

AUTO MANUFACTURERS

A SPONSORSHIP CATEGORY UPDATE

ieg.TM

AUTO MANUFACTURERS

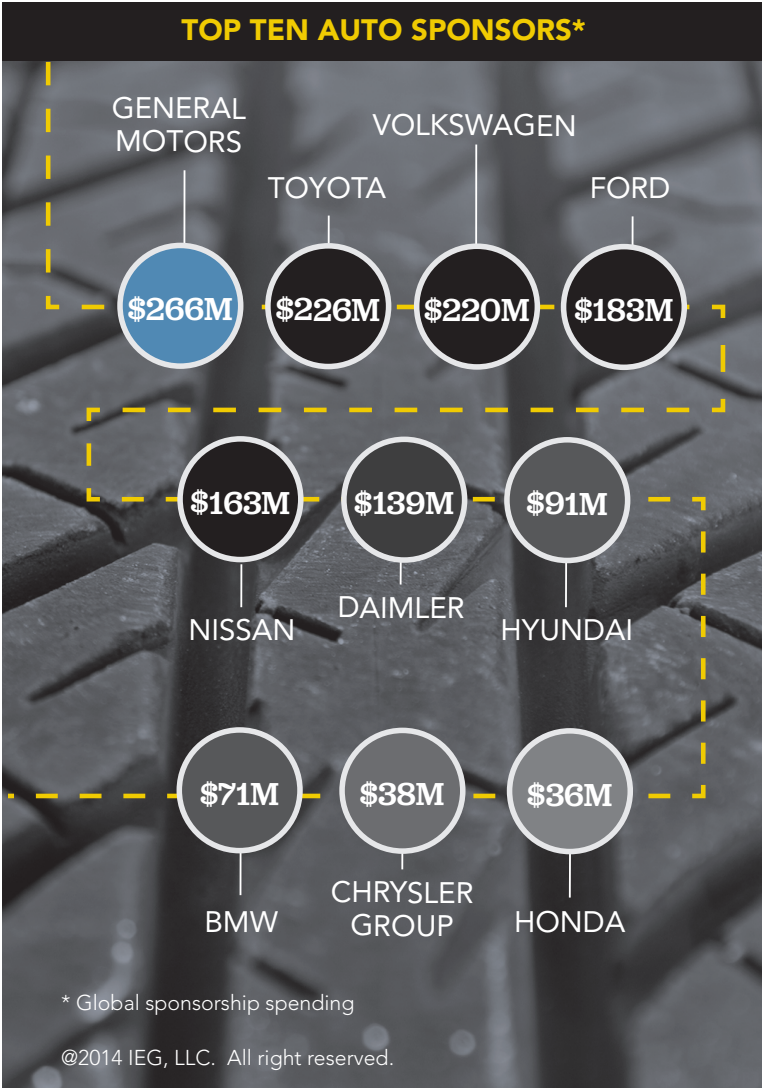
WHILE EVERY AUTO MANUFACTURER PUT THE BRAKES ON SPONSORSHIP AT THE END OF THE LAST DECADE, THEY ARE NOW HITTING THE SPONSORSHIP ACCELERATOR TO SHOWCASE VEHICLES AND REACH NEW AUDIENCES AS SALES REBOUND.

Annual global auto sales in 2013 hit a record 82.8 million vehicles, according to consulting firm IHS Automotive. As the industry completed a comeback from the depths of the Great Recession, so did sponsorship activity.

Automakers today typically use sponsorship to accomplish five key marketing objectives:

- Showcase new vehicles
- Reach new audiences
- Support brand positioning
- Reward existing customers
- Gain test drives

The importance of one-on-one marketing platforms for automakers cannot be understated. As an example of how vital interaction with actual vehicles is, Ford Motor Co.'s Lincoln brand reports a 30-point increase in positive opinion among consumers who experience its redesigned cars and SUVs.



AUTOMAKERS DRIVE NEW ACTIVATION USING SOCIAL AND DIGITAL CONTENT

LIKE EVERY OTHER CATEGORY, AUTO MANUFACTURERS ARE INCREASINGLY ACTIVATING SPONSORSHIP THROUGH SOCIAL MEDIA AND DIGITAL PLATFORMS TO AMPLIFY THEIR MESSAGE AND ENGAGE CONSUMERS IN NEW AND UNEXPECTED WAYS.

AUDI AND ST. GEORGE OPENAIR CINEMA

Amplifying the on-site experience

The German automobile manufacturer in 2013 amplified its sponsorship of Sydney, Australia's St. George OpenAir Cinema by providing attendees an opportunity to share the experience with friends and family.

The automaker gave attendees the chance to make their own red carpet arrival by having their photo taken in an Audi R8 Spyder convertible. Attendees could receive the photo by email or have the image directly uploaded to their Facebook or Twitter accounts.

Audi posted the content on Twitter and other social media platforms with the #AudiAtTheMovies hashtag. The automaker sponsors the Sydney Film Festival and other film festivals in Australia.





DODGE AND MÖTLEY CRÜE

Using social media to extend promotional reach

Dodge is activating its sponsorship of legendary rock band Mötley Crüe's 2014 tour with the Dodge Chance To Be Bad giveaway offering an opportunity to win a 2015 Dodge Charger or Challenger, autographed guitars and other prizes.

Consumers who enter the promotion at www.DodgeChanceToBeBad.com can enhance their odds of winning by sharing custom links across Facebook, Twitter, Pinterest, Google+ and LinkedIn. In addition, fans of the Dodge Facebook page will be invited to like and comment on a weekly wall contest in exchange for the opportunity to win a package of exclusive Mötley Crüe collector items.

Dodge has used Mötley Crüe's single "Kickstart My Heart" in three 30-second commercials for the Charger and Challenger.

ACURA AND THE SUNDANCE FILM FESTIVAL

Aggregating and curating social conversation

Acura this year activated its four-year-old sponsorship of the Sundance Film Festival with a new social media program: the Acura Prism.

Aggregating trending information about the festival and displaying it as part of a large installation provided attendees real-time updates on films, actors and other relevant subject matter. Acura distributed the content via on-site kiosks located within the Acura Lounge, an experiential area that featured the Acura Tavern, a digital concierge and live music.

Acura also used the Acura Lounge to display the MDX and all-new RLX Sport Hybrid, the latter of which doubled as an online photo booth through which pictures could be directly posted to consumers' social media accounts.





LINCOLN AND BECK

Using digital content to support brand campaign

Ford Motor Co.'s Lincoln nameplate supported its "Hello Again" brand rejuvenation campaign through a partnership with musician Beck, around which it developed an interactive music video recreating David Bowie's "Sound and Vision."

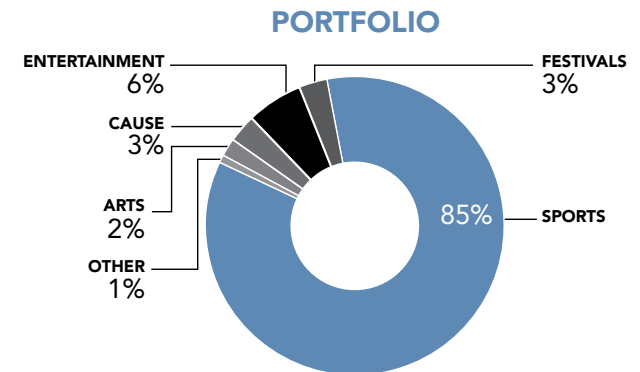
Capturing content with 360-degree cameras and microphones, the video offers viewers the opportunity to experience the show through a variety of lenses and sound origins from each and every seat in the house.

Attempting to contemporize its image and reach a new generation of car buyers, the luxury brand also has created interactive videos for singer/songwriter Aloe Blacc, as well as for its new partnership with the Tribeca Film Festival presented by AT&T.

MOST ACTIVE AUTO SPONSORS

PORTFOLIO AND ACTIVATION OVERVIEWS

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$266M	TOP PROPERTIES IN TERMS OF SPENDING:
	<ul style="list-style-type: none"> • Manchester United Football Club • National Football League • Hendrick Motorsports NASCAR team • Major League Baseball • Walt Disney World Resort



GENERAL MOTORS CO.

Chevy plays a starring role in GM's sponsorship portfolio as the lead brand in the company's five largest deals.

The auto giant has shifted its global sponsorship strategy after announcing the withdrawal of the Chevy brand from Europe beginning in 2015. GM dropped Chevy's sponsorship of FC Liverpool but will keep the brand's jersey deal with Manchester United, a partnership it will use to promote Chevy in Asian markets.

Chevy in July will kick off the seven-year Man U tie by sponsoring a pre-season game against the MLS Los Angeles Galaxy at the Rose Bowl in Pasadena, Calif. Chevy will stream the match on www.ChevroletFC.com.

Chevy in 2013 expanded its presence in soccer with a three-year tie to U.S. Soccer.

Buick's sponsorship portfolio includes the NCAA and a new tie with pro golfer Shanshan Feng, while GMC sponsors the Calgary Stampede, Whistler Blackcomb resort and a smattering of sports leagues and teams.

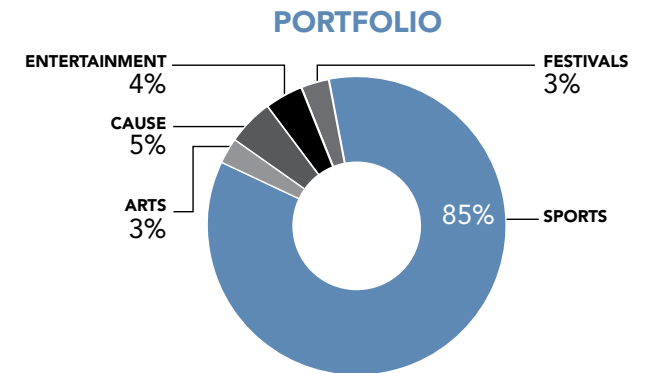
With the exception of sponsorship of the World Golf Championships event in Miami, Cadillac's focus is on proprietary events, and partnerships with publishers and other media companies.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$226M



TOP PROPERTIES IN TERMS OF SPENDING:

- Joe Gibbs Racing NASCAR team
- Michael Waltrip Racing NASCAR team
- Australian Football League
- FIFA Club World Cup presented by Toyota
- Toyota Center, Houston



TOYOTA MOTOR CORP.

Toyota is making a push further into the U.S. motorsports scene. It is set to replace Ford as the official automobile sponsor of the NHRA in 2015 and was the first major sponsor of Daytona International Speedway's \$400 million renovation. Toyota used the latter tie to celebrate its 10th anniversary in NASCAR.

New non-endemic deals include title of FC Dallas Stadium and sponsorship of Oprah Winfrey's "The Life You Want" speaking tour.

On the renewal front, Toyota this year extended its partnership with the Australian Football League for another two years and BASS fishing tournaments through 2017.

Toyota activates its long-running tie to the FIFA Club World Cup with on-site vehicle displays and consumer engagement programs. The automaker also provides vehicles for team officials and tournament staff.

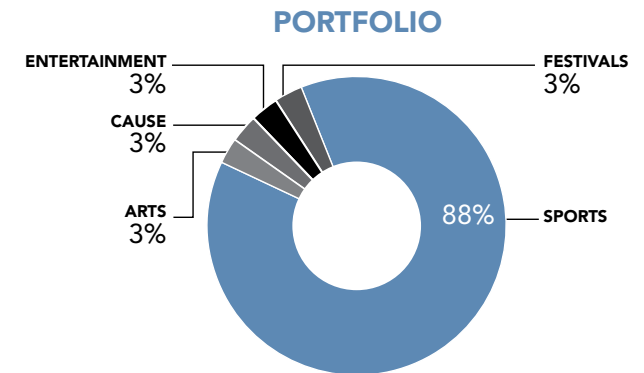
The portfolio for Toyota's Lexus luxury division includes the NBA New York Knicks and Chicago's United Center.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$220M



TOP PROPERTIES IN TERMS OF SPENDING:

- VfL Wolfsburg (German Bundesliga club)
- Sochi 2014 Winter Olympic Games
- Brazilian Serie A (soccer league)
- French Football Federation
- Brazilian Football Confederation



VOLKSWAGEN AG

Volkswagen in 2013 doubled down on soccer following a global review of its sponsorship portfolio. Ties include Major League Soccer in the U.S., the Brazilian Football Federation and ownership of VfL Wolfsburg, a team located in Volkswagen's German hometown. The automaker has continued to expand its presence in soccer, including a new tie to the French Football Federation.

Volkswagen of America in 2013 adopted a new sponsorship strategy that focuses on two marketing platforms: soccer and cycling. As part of the new strategy the automaker dropped its long-running involvement in endurance sports, including ties to the Bank of America Chicago Marathon, Long Beach International City Bank Marathon and Georgia's Peachtree Road Race.

Volkswagen leverages MLS and USA Cycling to create national marketing platforms that provide local reach. Case in point: the automaker leverages MLS to access athletes, the MLS Cup and other assets that can be used to create in-market promotions.

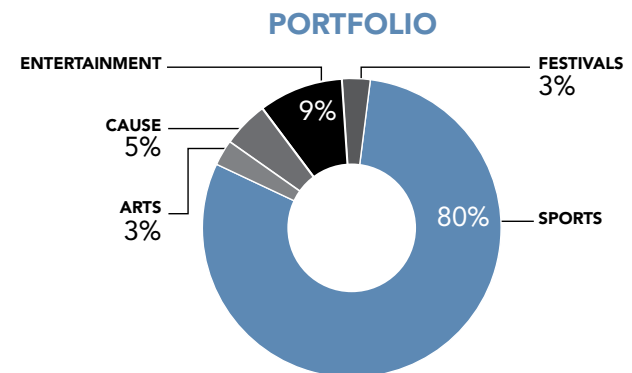
VW's Audi marque also is active in sponsorship, including deals with soccer clubs FC Bayern Munich, Real Madrid FC and FC Barcelona.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$183M



TOP PROPERTIES IN TERMS OF SPENDING:

- UEFA Champions League
- AT&T Stadium, Dallas
- Roush Fenway Racing NASCAR team
- New Zealand Rugby Union
- Professional Bull Riders



FORD MOTOR CO.

Ford this year announced it will end its 21-year-old partnership with UEFA Champions League at the conclusion of the 2014 season. Currently, the automaker is leveraging the tie to support the launch of the Ford Mustang in Europe.

Ford also is an active sponsor of music, a platform it uses to engage young adults and showcase vehicle technology. The automaker in 2013 worked with Live Nation to create a digital content series on LiveNation.com that featured music fans using a Ford Fiesta to locate items for their favorite bands' tour riders.

Ford in 2013 announced that it will drop its partnership with the NHRA, John Force Racing and other NHRA teams at the conclusion of the 2014 season. The company will maintain a presence in drag racing at the grassroots level.

The automaker sponsors the Professional Bull Riders on behalf of the Built Ford Tough brand platform. Ford activates the tie with Clash of the Cowboys, a webisode series and promotion that dangles tickets to the PBR Built Ford Tough World Finals.

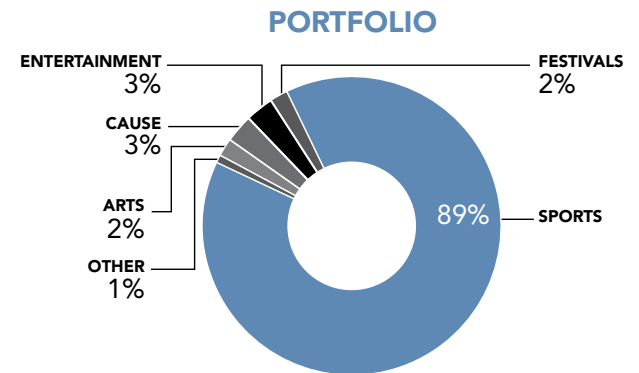
Ford over the past two years has used sponsorship to promote its Lincoln luxury brand. Lincoln focuses on three marketing platforms: thought leadership, art and design. Ties include the Grammys, Film Independent Spirit Awards and a new partnership with the Tribeca Film Festival presented by AT&T.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$163M



TOP PROPERTIES IN TERMS OF SPENDING:

- Infiniti Red Bull Racing F1 team
- Rio de Janeiro 2016 Olympic Games
- NCAA
- Club de Regatas Vasco da Gama (Brazilian soccer team)
- Royal Spanish Football Federation



NISSAN MOTOR CO.

Nissan's sponsorship strategy is going through a major transition as the company places more focus on global properties.

In a deal that will represent its largest sponsorship, Nissan will replace Ford as the official automobile sponsor of the UEFA Champions League at the conclusion of the 2014 season. The four-year sponsorship includes branding at Champions League matches, media, hospitality and a host of other benefits.

Nissan also will sponsor Rio 2016, around which it will provide 4,500 vehicles to transport athletes, journalists and officials during the games.

Nissan North America, Inc. has dropped its long-running involvement in cycling (Team RadioShack, Amgen Tour of California, etc.), marathons (Boston Marathon, TCS New York City Marathon, etc.) and other endurance sports events as it transitions its portfolio to support corporate's new global sponsorship strategy.

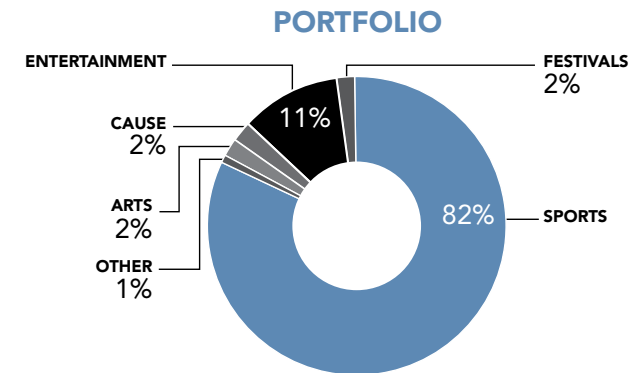
Luxury line Infiniti's sponsorships include the NCAA and the National Association of Basketball Coaches. Infiniti reportedly plans to drop its partnership with the Infiniti Red Bull Racing F1 team at the completion of the 2015 season.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$139M

TOP PROPERTIES IN TERMS OF SPENDING:

DAIMLER

- Mercedes AMG Petronas F1 team
- German Soccer Federation
- USTA US Open
- Mercedes-Benz Arena, Stuttgart
- Mercedes-Benz Fashion Weeks



DAIMLER AG

Mercedes-Benz sponsors high-profile sport, fashion and cultural events to promote its premium positioning, showcase its vehicles and engage customers and prospects.

Mercedes activates its sponsorship of the US Open with an on-site brand center where attendees can view the automaker's latest vehicles. The company also provides complimentary parking to Mercedes owners.

The automaker in 2013 expanded its long-running involvement in golf through a worldwide partnership of The Masters beginning at the 2014 tournament. Mercedes-Benz this year signed on as the official car partner of the Hong Kong Golf Assn. and title sponsor of the annual HKGA Mercedes-Benz Classic.

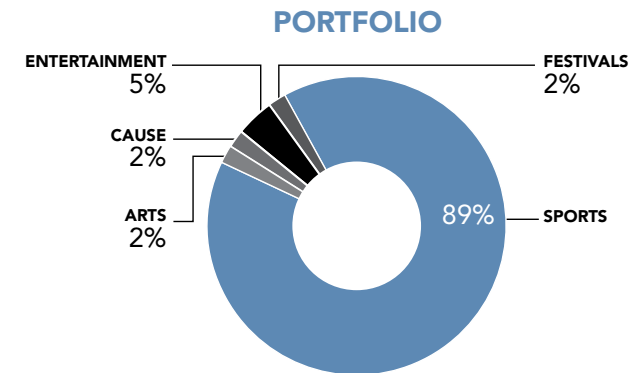
On the tennis front, Mercedes in 2013 inked a multiyear partnership with the ATP that affords official status at the Barclays ATP World Finals. The company provides S-Class and other vehicles for tournament staff and players.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$91M



TOP PROPERTIES IN TERMS OF SPENDING:

- FIFA
- UEFA
- 24 NCAA college athletic programs (IMG)
- Hyundai Tournament of Champions (PGA Tour tournament)
- Chinese Football Association



HYUNDAI MOTOR CO.

Hyundai sponsors on its own and with sister brand Kia Motors Co.

Hyundai sponsorships include 24 college athletic programs, the Hyundai Tournament of Champions PGA Tour stop and the Chinese Football Assn., while Hyundai/Kia ties include FIFA and UEFA.

Hyundai Motor America credits its sponsorship of college sports with building brand perception and purchase consideration: 71 percent of fans surveyed said they had an improved opinion of Hyundai as a result of the sponsorship, while 68 percent were at least somewhat likely to consider buying a Hyundai vehicle.

Hyundai in 2013 extended its three-year-old title of the Hyundai Tournament of Champions through 2015. The automaker uses the sponsorship in part to promote its premium Genesis and Equus vehicles.

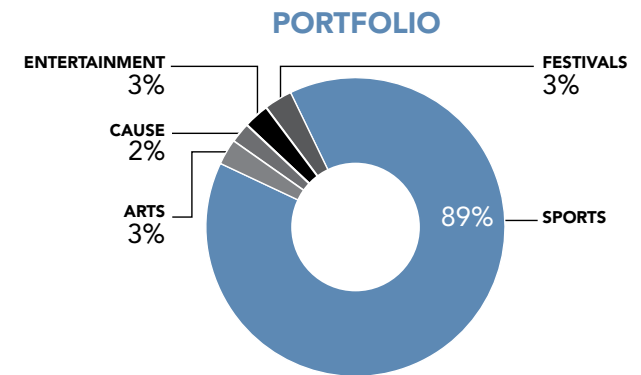
Other Kia ties include the Australian Open, NBA and Kia X Games Asia.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$71M



TOP PROPERTIES IN TERMS OF SPENDING:

- MotoGP
- BMW Championship (PGA Tour tournament)
- BMW Masters (European Tour tournament)
- French Rugby Federation
- European Tour



BMW AG

With more than 25 years in golf and 40 years in the arts, BMW has long used sponsorship to promote the BMW brand promise of creativity and innovation. From a global perspective, the automaker focuses on three platforms: motorsports, golf and sailing, all of which it uses to support its premium brand positioning.

BMW activates sponsorship to showcase its engineering prowess. BMW Designworks USA helped redesign the U.S. Bobsled team's two-man bobsled for the 2014 Sochi Olympic Games. The automaker promoted its involvement with the team through a documentary dubbed *Driving on Ice* that ran on NBC, NBCOlympics.com and BMW.com. BMW also showed the documentary in dealerships.

BMW partnered with the U.S. Olympic Committee in 2010 on a six-year deal.

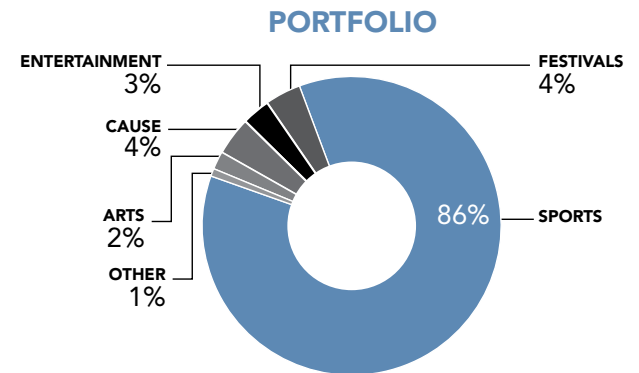
BMW owns the European Tour's BMW International Open, a golf tournament located near the company's hometown of Munich.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$38M



TOP PROPERTIES IN TERMS OF SPENDING:

- Juventus Football Club (Italy)
- Professional Rodeo Cowboys Assn.
- Winter X Games
- Kentucky Derby/Churchill Downs
- Red Bull Signature Series



CHRYSLER GROUP LLC

Chrysler Group sponsors on behalf of its brands—namely Jeep, Ram Truck and Dodge.

Jeep is tied to Juventus FC and in 2014 marked its 11th year as the exclusive automotive sponsor of ESPN's Winter X Games. Jeep used the event to launch a new TV advertising campaign for the Jeep Wrangler Polar Edition. The brand activated the tie with the "Polar Quest" online sweepstakes that dangled a Jeep Wrangler and other prizes.

Ram claims two of the other top Chrysler Group sponsorships—exclusive automotive sponsor of the Kentucky Derby and Churchill Downs racetrack for the past five years, and official automotive sponsor of the PRCA, a partnership that began in 1982 under the Dodge brand.

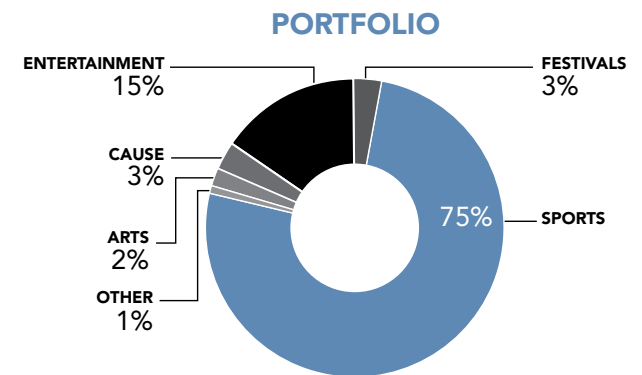
Dodge sponsors music tours, action sports and other properties that support the brand's positioning of power, passion and performance. Ties include Mötley Crüe's tour—a sponsorship that supports the use of the band's songs in TV ads for the Dodge Charger and Challenger—and the Red Bull Signature Series of action sports events, a partnership designed to promote the Dodge Dart to millennials.

ESTIMATED 2013 GLOBAL SPONSORSHIP SPEND: \$36M

TOP PROPERTIES IN TERMS OF SPENDING:

HONDA
The Power of Dreams

- Honda Center
- Disneyland
- National Hockey League
- Honda Classic (PGA Tour tournament)
- Indy Racing League IZOD IndyCar Series



HONDA MOTOR CO.

Honda has not made any splashy new deals in recent years, instead sticking with a diverse portfolio that includes sports, music, festivals and more.

While many automakers are hesitant about committing to long-term relationships, Honda is the exception. The company has sponsored the Honda Civic Tour for 13 years, Little League Baseball for 18 years and the Honda Classic PGA Tour stop for more than three decades.

Honda's music portfolio includes the Austin City Limits Music Festival in Texas and the Governors Ball Music Festival in New York City. The automaker activates the festivals with the Honda PhotoBooth, online sweepstakes and social media platforms built around the #HondaStage hashtag.

Luxury division Acura's sponsorships include the Sundance Film Festival and the New Orleans Jazz & Heritage Festival presented by Shell.

ABOUT IEG AND ESP PROPERTIES

IEG has shaped and defined sponsorship over three decades. It is the globally recognized source for industry insights, trends, training and events via sponsorship.com, its annual conference, online publications, trend reports, surveys and webinars.

IEG is part of ESP Properties, a WPP company. As a commercial and creative advisor for rightsholders, ESP Properties helps organizations unlock greater value from their audiences and brand partnerships.

Our consulting team assesses and advises how to grow the value of rightsholders' commercial programs. We do this through a full range of services across data, digital and content development to better understand audiences and create more relevant ways to engage with them. This provides brand partners with new ways to connect with communities of fans and followers, growing the potential value of commercial partnerships.

Our sales team provides partnership strategy and sales representation to the world's most active sponsors, within and beyond the WPP network of brand clients. Through WPP we have extensive contacts and deep insights into what it takes to create successful partnerships.

For more information about the value of sponsorships and partnerships, IEG and ESP Properties, please visit www.sponsorship.com, www.espglobal.com, or call Dan Kowitz at 312/725-5114.



DAN KOWITZ

Senior Vice President, Business
Development, ESP Properties