



— VISION 2016 —

# TAKE CONTROL

A ROADMAP FOR **GROWTH**



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# Shifting the consumer into the driver's seat

How AutoNation is  
blending the online  
and in-store experience





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## Introducing:

- **Allan Stejskal**  
AutoNation
- **Dominic DeGuiseppe**  
Experian





# Shifting the consumer into the driver's seat



## Are consumers willing to make the leap to buying online?

- Industry trends

## Why is AutoNation making this transition?

- Why – Why this change? Why now?
- Opportunity – What is the goal?
- How – Data, tools and analytics being used to support change

## Future state of the industry

- How will consumers engage in the retail automotive landscape going forward?

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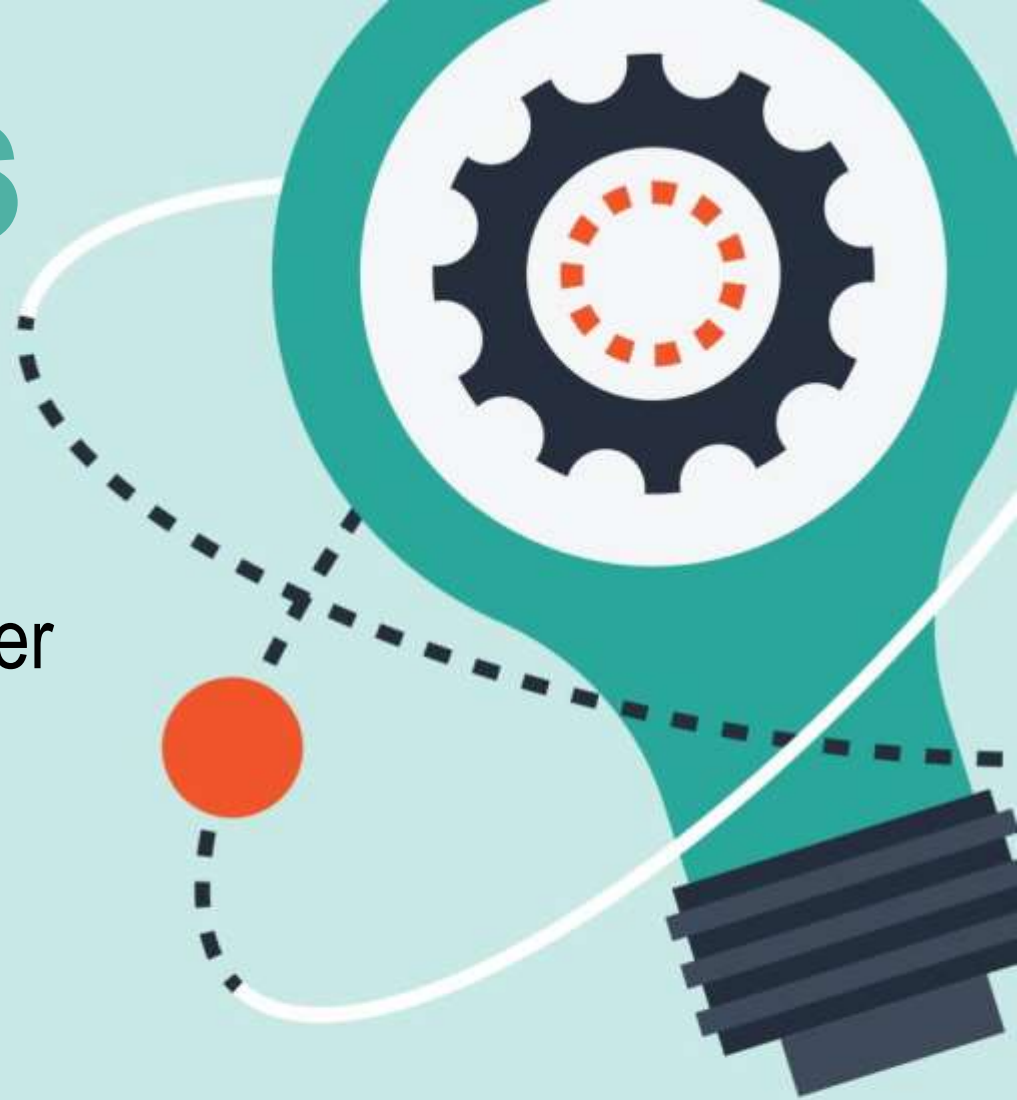


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# SUCCESS

“ If there is any one secret of success, it lies in the ability to get the other person’s point of view and see things from that person’s angle as well as from your own. ”

— Henry Ford



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# Industry trends

## Cars sold per year:

- New car sales
  - ▶ Full year 2015 sales: 17.4 million units (broke record held since 2000)
  - ▶ 2016 forecast is approximately 17.6-17.8 million units
- Used car sales
  - ▶ 2015: approximately 41 million units
  - ▶ Sales channel: franchised dealer 37%; independent dealer 33%; and private party 30%
- More than 250 million vehicles on the road
- 3.5% of GDP; 15% of all retail sales

## Key players:

- 20 OEM / car companies with 40+ brands
- 17,500 franchise dealers; 30,000 independent
- 100's of lenders

## Spend:

- Advertising spend more than \$30 billion (50% OEM; 50% dealer)
  - ▶ Digital Ad spend \$14 billion, 18% YOY growth
- Sales incentives \$36 billion (\$2,200 / new cars sold)

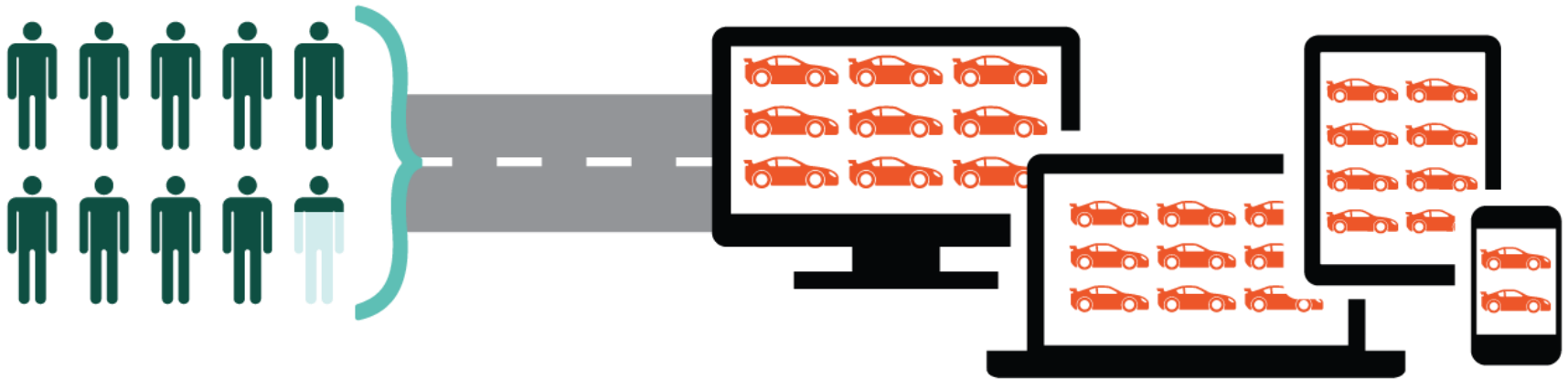
## Lending:

- \$480 billion annual auto originations. \$348 billion indirect, \$132 billion direct
- Cars financed: 85% new; 55% used
- Vehicle sales leased: 28% of new vehicles financed
- New car loan: average payment \$483 / month; length 67 months (longest in history); amount financed \$28,711 (all records)



# How are consumers buying?

93%



of people seek to buy a car using some form of digital process



# How are consumers buying?

## 10 years ago

Buyers visited an average of

5



Dealerships

## Today

Buyers visit between

1-2



Dealerships



**75%**  
of people  
would consider  
conducting



the entire  
purchase  
**online**





People  
would even  
consider



skipping the  
test drive



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a lot is  
still the same



**80%**  
of buyers  
check prices  
from an  
average of

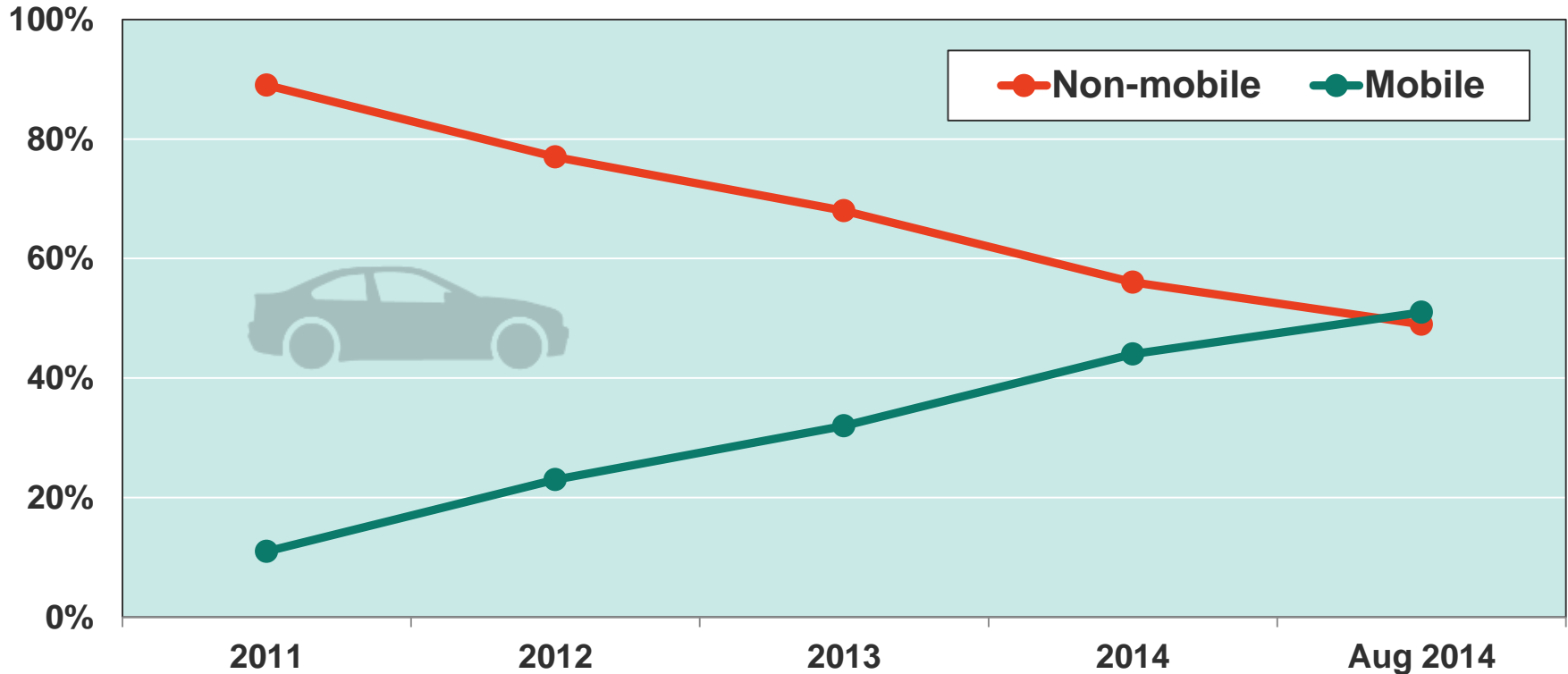
10 dealers  
online before  
picking the  
right one

Dealers Challenged by Smartphone Car Buyers,  
Detroit Free Press, January 2015



# Consumer behavior is changing as mobile is dominating

## Percentage of retail traffic



Source: Branding Brand (September 2014)

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# Competition is coming fast with an experience to better meet the needs of consumers



CARVANA

One-stop digital shop



ROADSTER

Browse, build and buy – delivery included



beepi

First digital peer-to-peer marketplace

**SHIFT**

Used card, premium experience

**TRED**

Sell your car for the \$\$ you deserve

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# Liquid expectations

## Direct

Competing directly  
with your service



## Experiential

Setting expectations  
across industries

UBER



## Perceptual

Changing customer  
expectations

Google now

amazon echo





# Effort requires an integrated solution from online to store



**Online**



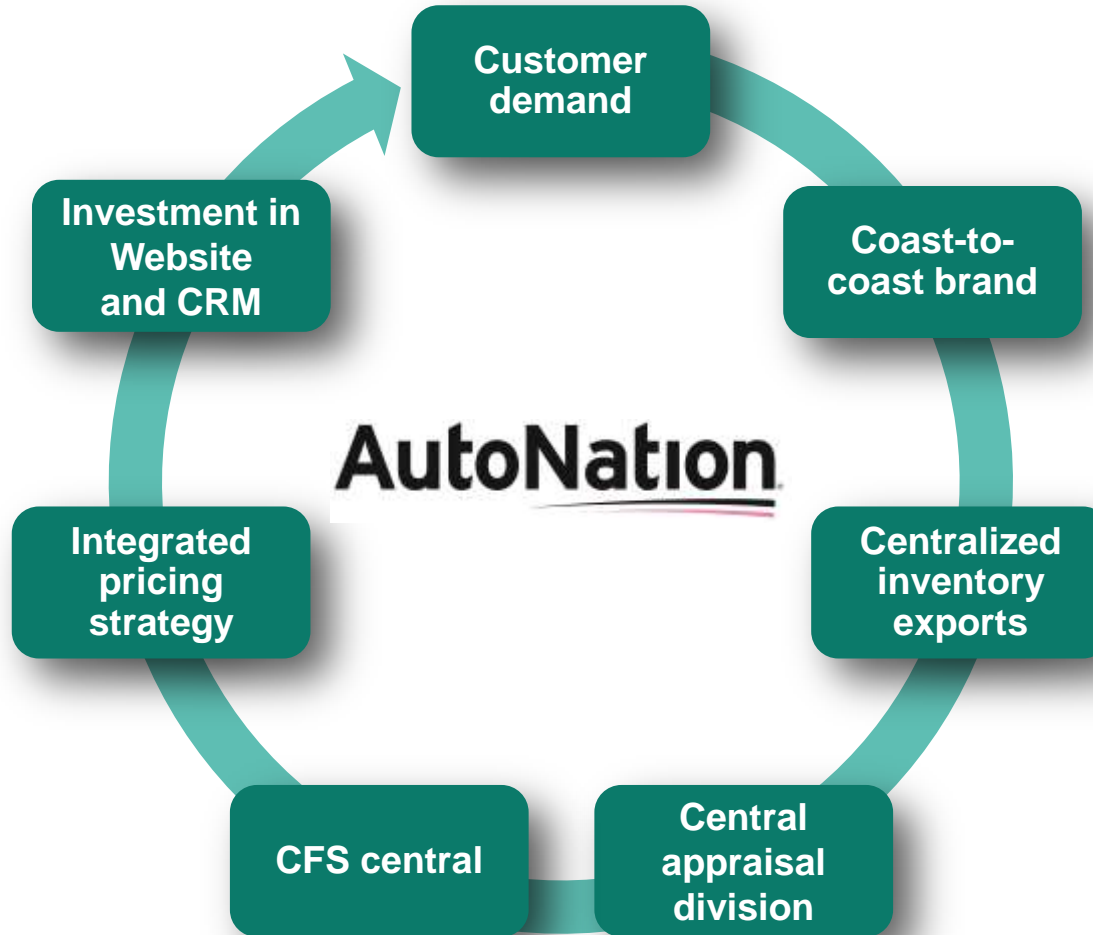
**In-store**



**Call center**



# The foundation is ready



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**AutoNation EXPRESS** CALL (888) 240-9961 Click To Chat FAQ

## Start The Finance Process


**Get Pre-Qualified Today**

Our pre-qualification is an easy, quick start toward your car buying goal. Just take a few minutes and complete the information below.

- Competitive Interest Rates
- Safe, Secure and Fast
- Saves Time at Our store



**MY VEHICLE DETAILS** Need Help?

	<b>Personal Information</b>		
<b>Year</b> 2016	<b>FIRST NAME</b> Dominic	<b>MIDDLE INITIAL</b> 	<b>LAST NAME</b> DeGiuseppe
<b>Make</b> Chevrolet	<b>EMAIL ADDRESS</b> dominic.degiuseppe@experian.com	<b>PHONE NUMBER</b> (830) 841-1734	
<b>Model</b> Corvette	<b>CURRENT ADDRESS</b> 1060 W. Addison St.	<b>APT/SUITE/OTHER</b> 	
<b>Trim</b> Z51 3LT	<b>CITY</b> Chicago	<b>STATE</b> IL	<b>ZIP CODE</b> 60613

I understand that by clicking on the I AGREE button immediately following this notice, I am providing written instructions to AutoNation under the Fair Credit Reporting Act authorizing AutoNation to obtain information from my personal credit profile or other information from Experian. I authorize AutoNation to obtain such information solely to prequalify me for financing options. **I AGREE**

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America's Largest Automobile Retailer.  
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**Only name and address required**

**No hard inquiry logging**

**Consumer learns available financing options**

**Seamless online to instore experience**



MY VEHICLE DETAILS



Year	2016
Make	Chevrolet
Model	Corvette
Trim	Z51 3LT



**Congratulations Dominic! You're pre-qualified for an auto loan up to \$1,000,000.**

The pre-qualified auto loan amount is only valid at any AutoNation store. This offer is not guaranteed if you do not meet our criteria, including providing acceptable property as collateral.

Please complete the finance application below to **lock in your rate today** or click on the button below to access your My AutoNation.

[Go To My AutoNation](#)

Personal Information

DATE OF BIRTH

Month  Day  Year

EDUCATION LEVEL

Select

SOCIAL SECURITY NUMBER

VERIFY SOCIAL SECURITY

Chat Now



# Integrated with each step of the journey

**AutoNation**

FIND A VEHICLE FINANCING VALUE MY TRADE-IN SPECIAL OFFERS SERVICE & REPAIRS FIND A STORE

2015 Honda Civic Automatic Price: \$22,819 Fort Lauderdale, FL

**2015 Chevrolet Malibu 4dr Sdn LT w/1LT**  
VIN: 3G2PVA5L5G2221877

2015 Dodge Charger Automatic Price: \$29,565 Fort Lauderdale, FL

### What I've Already Completed

Here's everything you've done so far. You can always see the details or make changes right here.

- My Car is Reserved** - Status: Completed  
CAR RESERVED until Sunday July 16, 2015. Add to Calendar
- My Appointment is Scheduled!** - Status: Completed  
Friday July 16, 2015 10:00 PM. Add to Calendar
- My Offer is Ready!** - Status: Completed  
CHECKED OFFER \$14,195. View
- My Payments Are Completed!** - Status: Completed  
Buy for \$1336 per month for 36 months at 4.9% finance. Lease for \$224 per month for 36 months at \$299. Show more payments
- My Financing Application is Submitted!** - Status: Completed  
A notification will be sent to verify address or phone on your application to approve. Submit to lender
- Protect My Car!** - Status: Completed  
Learn more or be done about all the ways to protect your investment. Show my status

**My Car is No Longer Reserved** - Status: Expired  
Reservation expired July 23. Show details

**My Appointment Date Has Passed** - Status: Expired  
Appointment was scheduled for July 17, 2015. Show details

**My Certified Offer Has Expired** - Status: Expired  
Expired July 20. Car value change automatically voided. View offer or a current offer good for 1 hour until all my financing done. Request New Offer

**My Payments Have Expired** - Status: Expired  
Buy for \$1336 per month for 36 months at 4.9% finance. Lease for \$224 per month for 36 months at \$299. Show more payments

**My Application Has Expired** - Status: Expired  
Lender's request for application to be completed after 10 days. Apply again

**STORE INFORMATION**  
AutoNation Chevrolet Fort Lauderdale  
1330 North Federal Highway  
Fort Lauderdale, FL 33304  
(954) 418-0000  
1.8 miles away  
Store hours: Today - 9:00am-7:00pm  
Service hours: Today - 7:00am-7:00pm  
Need help? Have one of our store representatives contact you. Contact me

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Learn more or be done about all the ways to protect your investment. Show my status

### What I've Missed

The following items have passed their expiration date but can apply to be re-submitted.

- My Car is No Longer Reserved** - Status: Expired  
Reservation expired July 23. Show details
- My Appointment Date Has Passed** - Status: Expired  
Appointment was scheduled for July 17, 2015. Show details
- My Certified Offer Has Expired** - Status: Expired  
Expired July 20. Car value change automatically voided. View offer or a current offer good for 1 hour until all my financing done. Request New Offer
- My Payments Have Expired** - Status: Expired  
Buy for \$1336 per month for 36 months at 4.9% finance. Lease for \$224 per month for 36 months at \$299. Show more payments
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Service hours: Today - 7:00am-7:00pm  
Need help? Have one of our store representatives contact you. Contact me

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**Enhance** human moments

**Remove** the unpleasant moments

And for goodness' sake  
**don't force digital**





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**For additional information,  
please contact:**

**Dominic.Deguiseppe@experian.com**



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# Share your thoughts about Vision 2016!

Please take the time now to give us your feedback about this session. You can complete the survey in the mobile app or request a paper survey.

1 Select the Survey button and complete

2 Select the breakout session you attended

Vision Conference  
Breakout Session Survey

Experian

1. How would you rate the presenters' knowledge?  
 Excellent  Above average  Average  Below average  Poor

2. How would you rate the presenters' delivery?  
 Excellent  Above average  Average  Below average  Poor

3. How would you rate the presenters' time management?  
 Excellent  Above average  Average  Below average  Poor

4. How useful was the session information?  
 Very useful  Somewhat useful  Neutral  
 Somewhat not useful  Not useful

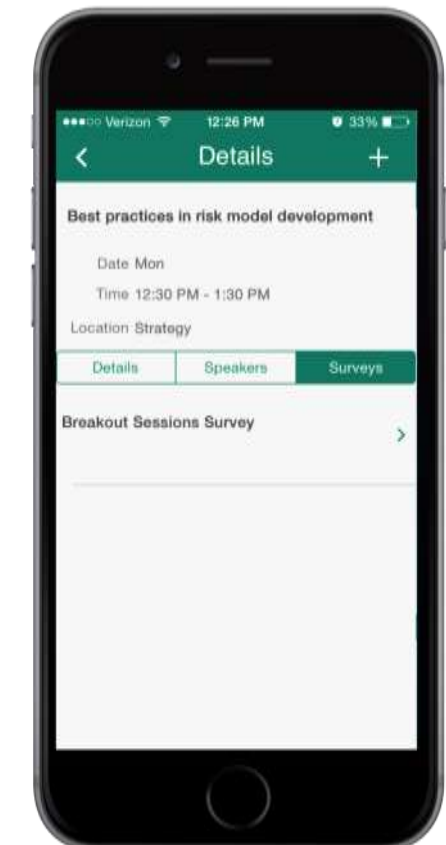
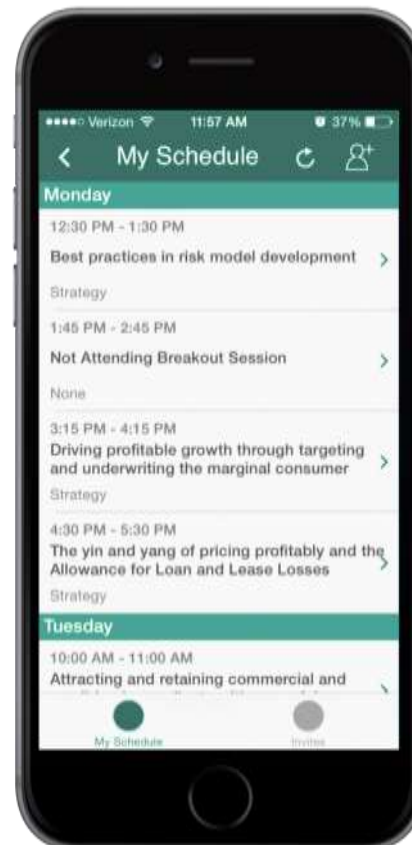
5. How would you rate the session on being current?  
 Very current  Somewhat current  Neutral  
 Somewhat not current  Not current

6. How relevant was the session content to the title and description?  
 Very relevant  Somewhat relevant  Neutral  
 Somewhat not relevant  Not relevant

7. How would you rate the level of content?  
 Too advanced  Just right  Too basic

8. Why did you attend this session? (Check all that apply)  
 Relates to my business  The presenter(s)  Interest in new product  
 Compelling session description  Increase product knowledge

9. Do you have any additional comments?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





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