



2017 Dealership Benchmarks

Motor Industry Services

Cars | Australia | 20th Anniversary Special Edition

The 2017 Deloitte Motor Industry Services Dealership Benchmarks

It is our pleasure to present the 2017 Deloitte Motor Industry Services Dealership Benchmarks for the Australian car market.

The benchmarks are split into three market categories: the Volume Market segment, the Prestige Market segment and the Luxury Market segment. This segmentation aims to reflect the different dealer business models used to operate and generate a profit at the dealership level. 2016 was a year of market growth and margin challenges with the dealer profitability coming under pressure in the second half of the year. This demands that the dealers remain agile and adapt quickly to changing market conditions. It should be noted that while the business models in each segment are intrinsically impacted by the brands that dealers carry, the benchmarks are not a commentary on the positioning or esteem of those brands. Please refer to the introduction to each of the benchmark sections for more insight into the segmentation categories.

The benchmarks should be used as a guide to building a sustainable, long term business. The starting point is the data uploaded to the eProfitFocus system of more than 850 dealers in the Australian market for the 12 months leading up to the benchmark period. The performances of the top 30% of dealers in each for the key departments (new, used, parts, service and finance & insurance) and also across the total dealership are isolated and taken as the reference point for the benchmarks. This raw data is then assimilated to reflect contemporary industry and market circumstances as well as long-held best practices.

In addition, you will also find Customer Retention Management (CRM) benchmarks. CRM benchmarking is an excellent method for dealerships to monitor and set goals towards effective acquisition, satisfaction and retention of customers.

We are always happy to speak further with you on any aspect of these benchmarks so please feel free to contact a member of the Deloitte Motor Industry Services team using the details provided at the back of this booklet.

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Volume Market



Volume Market benchmarks

The Deloitte Motor Industry Services dealership benchmarks help dealers assess their performance against a hypothetical high performing dealer running a similar type of business operation.

Dealers who fall into the Volume Market classification tend to be dealers focussing on the volume side of the volume/margin equation. Characteristics of dealers in this segment typically have:

- Higher through-put (e.g. sales per sales person)
- Lower margins (e.g. gross per new vehicle retailed)
- A relatively low fixed cost base (as a percentage of gross); and
- A 'front-end' bias to their overall business orientation (i.e. more than half their gross profit is generated from selling new and used cars).

In 2016, dealers in the Volume Market took advantage of high volumes but also saw an increase in the cost base. This year also saw the 'front-end' bias dilute. This coupled with the pressure on gross led to retracted benchmarks for all parameters in 2017.

A note about these benchmarks

Benchmarking is an excellent method of monitoring performance and setting goals. These benchmarks are a measure of 'best practice' as identified in the industry and represent the top 30% of dealers in the eProfitFocus database of more than 800 dealers.

The intention of the benchmarks is to provide a 'guide only' for dealership performance. Some dealerships, due to certain geographic or demographic circumstances, cannot achieve all the guidelines.

For further clarification and interpretations of benchmarks please contact us at

1300 784 511

eprofitfocus@deloitte.com.au

Total dealership

Trading summary

Net profit as % of sales*	3.2-3.5%
Days to dealership breakeven**	24

* Average Dealer NP%\$ 1.8%

**Based on a full month i.e. 30 days

Dealership structure	Orientation	GP %
New	35%	7-9%
Used	14%	10-12%
Parts	14%	22-26%
Service	37%	64-68%
	100%	12-14%
Front end (vehicle operations)	49%	
Back end (fixed operations)	51%	
Finance and insurance income	18% of total gross	
Other income and incentives	15% of total gross	

Orientation = Where does the gross come from?

GP% = How strong are my margins?

Note these orientation benchmarks are aimed at building a balanced business that is sustainable over time.

People

Gross per employee per month	\$8,600
Net profit per employee per month	\$2,400

Vehicle operations

Product	New	Used
Gross per unit*	\$2,600	\$2,100
Used/new ratio (retail)	n/a	0.5
Days supply	55-65	65-75
Stock turns p.a.	6-7	5-6
Gross ROI**	63%	68%

* Includes holdback, bonuses, aftermarket and load reversals but excludes F&I

** Gross as a % of cost of sales x turns p.a.

People	New	Used
Units per sales staff per month	14	14
Gross per salesperson per month	\$36,400	\$29,400

Finance and Insurance (F&I)

F&I Product	New	Used
Finance penetration	32-36%	30-34%
Finance income per contract	\$2,400-\$2,600	\$2,700-\$2,900
Finance per retail unit sold	\$900	\$950
Insurance per retail unit sold	\$180	\$200

F&I selling gross per vehicle retailed	\$950
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People

Vehicles retailed per F&I staff per month	50-55
Salaries and commissions as a % of income	21%
F&I income per dept employee per month	\$60,000

Fixed operations

Parts department	Sales mix %	GP %
Retail/counter	5%	29%
Wholesale/trade	24%	19%
Workshop	28%	36%
Warranty	19%	11%
Internal	24%	20%
Total	100%	23%

Operational benchmarks

Days supply	40-55
Stock turns p.a.	8-9
Monthly sales per employee	\$78,000
Monthly gross per employee	\$17,900
\$ Sales per \$ salary	\$16.00

Service department	Sales mix %	GP %
Labour		
– Retail	57%	79%
– Warranty	13%	69%
– Internal	30%	77%
Total labour sales	100%	76%
Sublet sales		13%
Total gross profit (% sales)		65%

Operational benchmarks

Performance index (productivity x efficiency)	95-105%
Monthly labour sales per technician	\$16,400
Monthly labour gross per technician	\$12,500
Parts/labour ratio	\$0.60
Ratio of chargeable to non-chargeable	1.8-2.3
Parts and service absorption	50-55%
Retention – relative service size**	\$1,650

**Labour sales per new retail unit sold per month

Department profitability

Vehicle operations	New		Used	
	% Gross	\$/Unit	% Gross	\$/Unit
Gross*	100%	2,600	100%	2,100
Sales staff salaries and comms	17.9%	465	20.5%	431
Manager salaries and comms	8.3%	216	12.2%	256
Other salaries	5.0%	130	5.0%	105
Pre-delivery costs	8.0%	208	-	-
Free service/policy	2.2%	57	-	-
Used warranty	-	-	3.0%	63
Advertising	8.0%	208	10.0%	210
Training	1.0%	26	0.4%	8
Floorplan	10.0%	260	3.0%	63
Demonstrator expenses	2.0%	52	2.5%	53
Selling gross	37.6%	\$978	43.4%	\$911
Selling gross per salesperson		\$14,000		\$13,000
Selling gross per employee		\$5,500		\$6,500

* Includes holdback, bonuses, aftermarket and load reversals but excludes F&I

Fixed operations	Parts % gross	Service % gross
Salaries (non-chargeable)	25.0%	24.8%
Advertising and promotion	0.8%	0.9%
Training	0.2%	1.3%
Policy/freight	3.0%	1.7%
Tools and supplies	0.3%	0.2%
Equipment and vehicle maintenance	2.4%	3.2%
Sick/holiday – technicians	-	4.9%
Selling gross	68.3%	63.0%
Selling gross per technician	-	\$10,400
Selling gross per employee	\$12,200	\$5,000

Department profitability

	% Gross
Administration and salaries	7.7%
Training	0.1%
FBT (net of contributions)	0.5%
Payroll tax	3.3%
Superannuation	5.2%
Long service leave	0.5%
Rent (or mortgage interest)	10.8%
Rates and taxes	1.3%
Property maintenance/outside services	3.0%
Telephone	0.8%
Insurance (including workers compensation)	2.1%
Office supplies/stationery	0.6%
Professional fees	0.6%
Data processing	1.5%
Bank charges and taxes	0.5%
Interest (overdraft/working capital)	0.5%
Bad debts	0.1%
Depreciation	2.0%
Electricity	1.2%
Travel and entertainment	0.5%
Miscellaneous	2.9%
Total fixed expenses	46%

Prestige Market



Prestige Market benchmarks

The Deloitte Motor Industry Services dealership benchmarks help dealers assess their performance against a hypothetical high performing dealer running a similar type of business operation.

Dealers who fall into the Prestige Market classification tend to be dealers focussing on finding a balance in the volume/margin equation. Characteristics of dealers in this segment typically have:

- Mid-range through-put (e.g. sales per sales person)
- Above average margins (e.g. gross per new vehicle retailed)
- A relatively low fixed cost base (as a percentage of gross); and
- A 'front-end' bias to their overall business orientation (i.e. more than half their gross profit is generated from selling new and used cars).

In 2016, dealers in the Prestige Market benefitted from strong volumes, but saw an increase in costs putting pressure on their profitability.

A note about these benchmarks

Benchmarking is an excellent method of monitoring performance and setting goals. These benchmarks are a measure of 'best practice' as identified in the industry and represent the top 30% of dealers in the eProfitFocus database of more than 800 dealers.

The intention of the benchmarks is to provide a 'guide only' for dealership performance. Some dealerships, due to certain geographic or demographic circumstances, cannot achieve all the guidelines.

For further clarification and interpretations of benchmarks please contact us at

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Total dealership

Trading summary

Net profit as % of sales*	3.5-3.8%
Days to dealership breakeven**	24

*Average Dealer NP%\$ 1.70%

**Based on a full month i.e. 30 days

Dealership structure	Orientation	GP %
New	38%	7-9%
Used	14%	12-14%
Parts	14%	20-24%
Service	34%	64-68%
	100%	12-14%
Front end (vehicle operations)	52%	
Back end (fixed operations)	48%	
Finance and insurance income	15% of total gross	
Other income and incentives	12% of total gross	

Orientation = Where does the gross come from?

GP% = How strong are my margins?

Note these orientation benchmarks are aimed at building a balanced business that is sustainable over time.

People

Gross per employee per month	\$8,100
Net profit per employee per month	\$2,300

Vehicle operations

Product	New	Used
Gross per unit*	\$2,800	\$2,400
Used/new ratio (retail)	n/a	0.5
Days supply	55-65	60-70
Stock turns p.a.	6-7	5-6
Gross ROI**	63%	82%

* Includes holdback, bonuses, aftermarket and load reversals but excludes F&I

** Gross as a % of cost of sales x turns p.a.

People	New	Used
Units per sales staff per month	14	14
Gross per salesperson per month	\$39,200	\$33,600

Finance and Insurance (F&I)

F&I Product	New	Used
Finance penetration	30-34%	33-37%
Finance income per contract	\$2,500-\$2,700	\$2,900-\$3,100
Finance per retail unit sold	\$830	\$1,000
Insurance per retail unit sold	\$205	\$225

F&I selling gross per vehicle retailed	\$975
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People	
Vehicles retailed per F&I staff per month	50-60
Salaries and commissions as a % of income	18%
F&I income per dept employee per month	\$66,500

Fixed operations

Parts department	Sales mix %	GP %
Retail/counter	4%	28%
Wholesale/trade	26%	17%
Workshop	30%	34%
Warranty	19%	10%
Internal	21%	21%
Total	100%	22%

Operational benchmarks

Days supply	50-60
Stock turns p.a.	6-7
Monthly sales per employee	\$91,000
Monthly gross per employee	\$20,000
\$ Sales per \$ salary	\$20

Service department	Sales mix %	GP %
Labour		
– Retail	58%	81%
– Warranty	13%	70%
– Internal	29%	77%
Total labour sales	100%	77%
Sublet sales		13%
Total gross profit (% sales)		66%

Operational benchmarks

Performance index (productivity x efficiency)	95-105%
Monthly labour sales per technician	\$17,200
Monthly labour gross per technician	\$13,200
Parts/labour ratio	\$0.65
Ratio of chargeable to non-chargeable	1.8-2.0
Parts and service absorption	50-55%
Retention – relative service size**	\$1,750

**Labour sales per new retail unit sold per month

Department profitability

Vehicle operations	New		Used	
	% Gross	\$/Unit	% Gross	\$/Unit
Gross*	100%	2,800	100%	2,400
Sales staff salaries and comms	17.0%	476	20.5%	492
Manager salaries and comms	8.0%	224	10.5%	252
Other salaries	5.0%	140	5.0%	120
Pre-delivery costs	7.0%	196	-	-
Free service/policy	1.5%	42	-	-
Used warranty	-	-	3.0%	72
Advertising	8.5%	238	9.0%	216
Training	3.0%	84	0.1%	2
Floorplan	9.0%	252	3.5%	84
Demonstrator expenses	2.0%	56	2.4%	58
Selling gross	39.0%	\$1,092	46.0%	\$1,104

Selling gross per salesperson	\$15,300	\$15,500
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Selling gross per employee	\$6,400	\$6,620
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* Includes holdback, bonuses, aftermarket and load reversals but excludes F&I

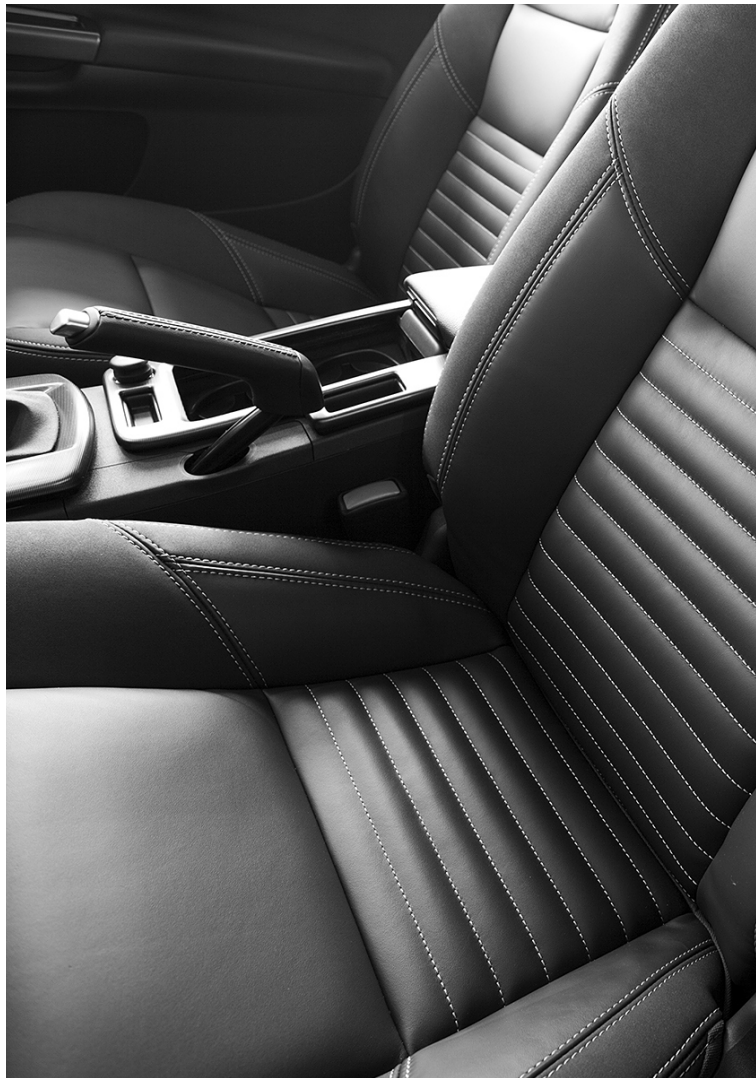
Fixed operations	Parts % gross	Service % gross
Salaries (non-chargeable)	24.0%	25.8%
Advertising and promotion	0.8%	0.8%
Training	0.2%	1.4%
Policy/freight	3.0%	1.6%
Tools and supplies	0.3%	0.1%
Equipment and vehicle maintenance	2.0%	3.3%
Sick/holiday – technicians	-	4.4%
Selling gross	69.7%	62.6%

Selling gross per technician	-	\$8,400
Selling gross per employee	\$14,000	\$6,500

Overheads

	% Gross
Administration and salaries	6.9%
Training	0.1%
FBT (net of contributions)	0.4%
Payroll tax	2.9%
Superannuation	4.8%
Long service leave	0.4%
Rent (or mortgage interest)	10.8%
Rates and taxes	1.2%
Property maintenance/outside services	2.6%
Telephone	0.7%
Insurance (including workers compensation)	2.0%
Office supplies/stationery	0.6%
Professional fees	0.5%
Data processing	1.5%
Bank charges and taxes	0.4%
Interest (overdraft/working capital)	0.5%
Bad debts	0.1%
Depreciation	2.0%
Electricity	1.1%
Travel and entertainment	0.5%
Miscellaneous	2.7%
Total fixed expenses	43%

Luxury Market



Luxury Market benchmarks

The Deloitte Motor Industry Services dealership benchmarks help dealers assess their performance against a hypothetical high performing dealer running a similar type of business operation.

Dealers who fall into the Luxury Market classification tend to be dealers focussing on finding a balance in the volume/margin equation. Characteristics of dealers in this segment typically have:

- lower through-put (e.g. sales per sales person)
- higher margins (e.g. gross per new vehicle retailed)
- an above average fixed cost base (as a percentage of gross); and
- a close to an even split between the 'front-end' and the 'back-end' in their overall business orientation (i.e. around half of their gross profit is generated from selling new and used cars).

In 2016, dealers in the Luxury market saw higher volumes but revenue came under pressure. These higher volumes led to the orientation shifting. This led to less retained margins and lower profitability in 2016.

A note about these benchmarks

Benchmarking is an excellent method of monitoring performance and setting goals. These benchmarks are a measure of 'best practice' as identified in the industry and represent the top 30% of dealers in the eProfitFocus database of more than 800 dealers.

The intention of the benchmarks is to provide a 'guide only' for dealership performance. Some dealerships, due to certain geographic or demographic circumstances, cannot achieve all the guidelines.

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Total dealership

Trading summary

Net profit as % of sales*	3.7-4.0%
Days to dealership breakeven**	24

*Average Dealer NP%S 1.80%

**Based on a full month, i.e. 30 days

Dealership structure	Orientation	GP %
New	43%	9-11%
Used	12%	10-12%
Parts	14%	21-25%
Service	31%	65-69%
	100%	12-14%
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Front end (vehicle operations)	55%	
Back end (fixed operations)	45%	
Finance and insurance income	14% of total gross	
Other income and incentives	9% of total gross	

Orientation = Where does the gross come from?

GP% = How strong are my margins?

Note these orientation benchmarks are aimed at building a balanced business that is sustainable over time.

People

Gross per employee per month	\$9,600
Net profit per employee per month	\$3,000

Vehicle operations

Product	New	Used
Gross per unit*	4,100	2,500
Used/new ratio (retail)	n/a	0.50
Days supply	65-75	65-75
Stock turns p.a.	5-6	5-6
Gross ROI**	55%	70%

* Includes holdback, bonuses, aftermarket and load reversals but excludes F&I

** Gross as a % of cost of sales x turns p.a.

People	New	Used
Units per sales staff per month	11	12
Gross per salesperson per month	\$45,100	\$30,000

Finance and Insurance (F&I)

F&I Product	New	Used
Finance penetration	34-38%	30-34%
Finance income per contract	\$2,000-\$2,200	\$2,100-\$2,300
Finance per retail unit sold	\$820	\$720
Insurance per retail unit sold	\$170	\$150

F&I selling gross per vehicle retailed	\$810
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People	
Vehicles retailed per F&I staff per month	50-55
Salaries and commissions as a % of income	19%
F&I income per dept employee per month	\$45,000

Fixed operations

Parts department	Sales mix %	GP %
Retail/counter	4%	27%
Wholesale/trade	27%	19%
Workshop	34%	35%
Warranty	20%	11%
Internal	14%	21%
Total	100%	23%

Operational benchmarks

Days supply	45-55
Stock turns p.a.	7-8
Monthly sales per employee	\$87,000
Monthly gross per employee	\$20,000
\$ Sales per \$ salary	\$17

Service department	Sales mix %	GP %
Labour		
– Retail	56%	78%
– Warranty	15%	69%
– Internal	29%	80%
Total labour sales	100%	77%
Sublet sales		12%
Total gross profit (% sales)		67%

Operational benchmarks

Performance index (productivity x efficiency)	95-105%
Monthly labour sales per technician	\$20,400
Monthly labour gross per technician	\$15,700
Parts/labour ratio	\$0.81
Ratio of chargeable to non-chargeable	1.8-2.3
Parts and service absorption	50-55%
Retention – relative service size**	\$1,950

**Labour sales per new retail unit sold per month

Department profitability

Vehicle operations	New		Used	
	% Gross	\$/Unit	% Gross	\$/Unit
Gross*	100%	4,100	100%	2,500
Sales staff salaries and comms	18.0%	738	21.5%	538
Manager salaries and comms	6.9%	283	8.1%	203
Other salaries	4.0%	164	4.0%	100
Pre-delivery costs	5.0%	205	-	-
Free service/policy	0.6%	25	-	-
Used warranty	-	-	3.0%	75
Advertising	9.0%	369	10.0%	250
Training	1.0%	41	0.2%	5
Floorplan	8.5%	349	3.5%	88
Demonstrator expenses	2.5%	103	2.0%	50
Selling gross	44.5%	\$1,823	47.7%	\$1,191
Selling gross per salesperson		\$20,100		\$14,700
Selling gross per employee		\$8,040		\$7,350

* Includes holdback, bonuses, aftermarket and load reversals but excludes F&I

Fixed operations	Parts % gross	Service % gross
Salaries (non-chargeable)	26.0%	26.4%
Advertising and promotion	0.7%	0.7%
Training	0.3%	2.1%
Policy/freight	3.0%	1.5%
Tools and supplies	0.2%	0.5%
Equipment and vehicle maintenance	1.5%	3.8%
Sick/holiday – technicians	-	4.4%
Selling gross	68.3%	60.6%
Selling gross per technician	-	\$9,500
Selling gross per employee	\$13,700	\$6,880

Overheads

	% Gross
Administration and salaries	5.9%
Training	0.1%
FBT (net of contributions)	0.6%
Payroll tax	2.7%
Superannuation	4.4%
Long service leave	0.6%
Rent (or mortgage interest)	11.0%
Rates and taxes	1.3%
Property maintenance/outside services	1.9%
Telephone	0.6%
Insurance (including workers compensation)	1.7%
Office supplies/stationery	0.7%
Professional fees	0.8%
Data processing	1.4%
Bank charges and taxes	0.6%
Interest (overdraft/working capital)	0.6%
Bad debts	0.1%
Depreciation	1.9%
Electricity	1.0%
Travel and entertainment	0.5%
Miscellaneous	2.3%
Total fixed expenses	41%

CRM

CRM benchmarking your dealership

In contrast to the generally accepted opinion, CRM is more than just a software solution. The best dealerships across the nation address the four pillars of comprehensive Customer Relationship Management equally.

The four pillars of CRM

People

Processes

Tools

IT Solution

For benchmark dealers, CRM is a combination of the marketing, sales and service departments' activities of effectively acquiring, satisfying and retaining customers. CRM benchmarking is an excellent method of monitoring the relevant operational performance and setting transactional goals in dealerships.

The five goals of CRM

1. Increase vehicle and service sales
2. Improve vehicle and service gross profits
3. Improve service retention and repurchases
4. Generate advocate customers
5. Reduce marketing expenses.

CRM benchmarks

These CRM benchmarks are a guide of Best Practices as identified in the Australian Motor Industry. The displayed figures represent the benchmark of what dealers need to aim for when implementing successful CRM operations.

Some dealerships, due to certain geographic or demographic circumstances, cannot achieve some of the benchmarks in practice. Nonetheless, we consider these CRM benchmarks to be realistic as 'a reference point' for a typical dealership in the Volume, Prestige and Luxury segments.

CRM and marketing

Every customer relationship begins with effective marketing.

Marketing effectiveness means:

1. Generate as many high quality Leads as possible
2. Increase return on every dollar spent in marketing
3. Improve customer experience.

Lead origin

Channel and enquiry type	New vehicle	Used vehicle
Dealership website	31%	10%
Phone-ins (website phone number)	21%	5%
Walk-ins (website solicited)	25%	7%
Online lead providers*	12%	70%
Phone-ins (traditional media only)	6%	5%
Walk-ins (traditional media only)	5%	3%
	100%	100%

*Average of all lead providers

Marketing/advertising costs

Per new vehicle	Volume	Prestige	Luxury
Benchmark dealers	\$238	\$238	\$400
Average dealers	\$240	\$243	\$345

Marketing campaign effectiveness metrics (traditional and online)

Metric	Sample calculation
1. Total number of leads generated	200
2. Total costs of campaign	\$15,000
3. Total units sold via campaign	20
4. Total GP of units sold via campaign	\$40,000

CRM and sales

How effective is your sales team at converting new market leads, referrals and repeat customers into sales.

Sales effectiveness means:

1. Maximise closing ratios and F&I penetration
2. Increase GP per sale and sales staff
3. Improve customer experience.

The Road to Sale

Conversion ratios	AVG staff	Top staff
Enquiries/leads**	100%	100%
Appointments*	70%	92%
Test drives*	45%	73%
Offers*	33%	58%
Sales*	22%	35%
F&I contracts*	6%	15%

Units per month (based on BM)	Volume	Prestige	Luxury
Test drives*	29	31	27
Offers*	23	25	22
Sales*	14	14	11
F&I contracts*	5	5	4

* % of enquiries/leads

** All channels: internet, phone, lead-providers and traditional

Online lead handling	Response time
Benchmark sales staff	<10 minutes
Average sales staff	<2 hours
Minimum acceptable standard	same day

CRM and service

Once acquired, how do you retain customers in service?

Service effectiveness means:

1. Increase service retention
2. Increase vehicle repurchase probability
3. Improve customer experience.

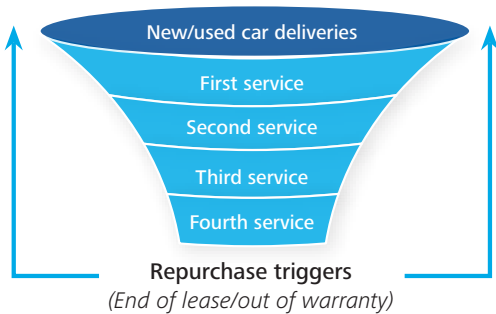
Service retention

Year after purchase	Metro	Rural
Handover/follow-up service	100%	100%
First year	91%	93%
Second year	82%	87%
Third year	68%	77%
Fourth year	49%	58%
Fifth year	40%	49%

How many customers, who bought their vehicle at the dealership have their car serviced at the dealership again?

The customer retention funnel

'Creating customers for life'



Repurchase intention

Customer type	Metro	Rural
All customers	33%	45%
F&I	50%	54%
Non-F&I	24%	37%

The Big 4 CRM measures

1. Customer orientation

New vehicle sales	Metro	Rural
Conquest customers (unsolicited)	62%	48%
Referral customers	13%	22%
Repeat customers	25%	30%
Total new vehicle sales	100%	100%

2. Customer profitability*

New vehicle customer profitability	National
Conquest customers (unsolicited)	100%
Referral customers	142%
Repeat customers	193%

* Customer profitability as % of conquest business (100%).

3. Dealership advocacy**

Customer	National
Advocates – positive word of mouth	80%
Indifferent customers	18%
Detractors – negative word of mouth	2%

** The dealership's ability to create advocate customers.

4. Customers' perception of effort in dealing with dealership

Effort	National
Customers who perceive low levels of effort	82%
Customers who perceive neutral levels of effort	11%
Customers who perceive high levels of effort	7%



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