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2018 Dealership Benchmarks

Motor Industry Services

Cars | Australia

Profit*focus*™

The 2018 Deloitte Motor Industry Services Dealership Benchmarks

It is our pleasure to present the 2018 Deloitte Motor Industry Services Dealer ship 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 reflects the different business models that dealers operate across the market in their quest to earn a profit. 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 and insurance) and also across the total dealership are isolated and taken as the reference point for the benchmarks. This data is then assimilated to reflect contemporary industry and market circumstances as well as long-held best practices.

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

We are always happy to discuss any aspect of these benchmarks so please feel free to contact a member of the Deloitte MotorIndustry Services team using the details provided at the back of this booklet or at **www.eprofitfocus.com**.

Contents

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)
- 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 2017, dealers in the Volume Market faced a slight decline in top line turnover largely due to a softer front end. However, a tight focus on maintaining overall dealership gross and on controlling costs saw the net profit benchmark in the Volume segment improve.

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 850 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*	3.6-4.0%
Days to dealership breakeven**	24

* Average Dealer NP%S 1.8%

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

Dealership structure	Orientation	GP %
New	35%	7-9%
Used	15%	9-11%
Parts	13%	22-26%
Service	37%	64-68%
	100%	**12-14%**

Front end (vehicle operations)	50%	
Back end (fixed operations)	50%	
Finance and insurance income	16% of total gross	
Other income and incentives	21% 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	$9,300
Net profit per employee per month	$2,750

Vehicle operations

Product	New	Used
Gross per unit*	$2,800	$2,600
Used/new ratio (retail)	n/a	0.5
Days supply	60-70	60-70
Stock turns p.a.	5-6	5-6
Gross ROI**	50%	60%

* 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	12	12
Gross per salesperson per month	$33,600	$31,200

Finance and Insurance (F&I)*

F&I Product	New	Used
Finance penetration	32-36%	30-34%
Finance income per contract	$2,700-$2,900	$2,700-$2,900
Finance per retail unit sold	$1000	$900
Insurance per retail unit sold	$180	$180

F&I selling gross per vehicle retailed	$930

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	$63,650

*The F&I Benchmarks reflect the top performances in the current market.
With significant regulatory change due in late 2018, many dealers are looking to restructure their F&I processes. In particular dealers are looking to lift new finance penetration to over 45% in order to offset expected declines in revenue per contract.

Fixed operations

Parts department	Sales mix %	GP %
Retail/counter	4%	23%
Wholesale/trade	25%	18%
Workshop	29%	34%
Warranty	19%	11%
Internal	23%	23%
Total	100%	23%

Operational benchmarks	
Days supply	40-55
Stock turns p.a.	8-9
Monthly sales per employee	$79,000
Monthly gross per employee	$18,200
$ Sales per $ salary	$21.00

Service department	Sales mix %	GP %
Labour		
– Retail	55%	80%
– Warranty	15%	74%
– Internal	30%	79%
Total labour sales	100%	80%
Sublet sales		11%
Total gross profit (% sales)		67%

Operational benchmarks	
Performance index (productivity x efficiency)	95-105%
Monthly labour sales per technician	$18,900
Monthly labour gross per technician	$15,100
Parts/labour ratio	$0.63
Ratio of chargeable to non-chargeable	1.8-2.0
Parts and service absorption	50-55%
Retention – relative service size**	$1,650

**Labour sales per new retail unit sold per month

Department profitability

	New		Used	
Vehicle operations	**% Gross**	**$/Unit**	**% Gross**	**$/Unit**
Gross*	100%	2,800	100%	2,600
Sales staff salaries and comms	19.9%	557	20.5%	533
Manager salaries and comms	8.1%	227	9.0%	234
Other salaries	6.0%	168	5.5%	143
Pre-delivery costs	8.8%	246	–	–
Free service/policy	2.2%	62	–	–
Used warranty	–	–	2.0%	52
Advertising	8.0%	224	9.0%	234
Training	0.5%	14	0.5%	13
Floorplan	10.0%	280	3.0%	78
Demonstrator expenses	3.0%	84	2.0%	52
Selling gross	**33.5%**	**$938**	**48.5%**	**$1,261**
Selling gross per salesperson		$11,300		$15,100
Selling gross per employee		$4,800		$8,400

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

Fixed operations	**Parts % gross**	**Service % gross**
Salaries (non-chargeable)	22.5%	22.6%
Advertising and promotion	0.5%	1.0%
Training	0.5%	1.5%
Policy/freight	0.6%	1.5%
Tools and supplies	0.5%	0.4%
Equipment and vehicle maintenance	1.2%	3.0%
Sick/holiday – technicians	–	5.0%
Selling gross	**74.2%**	**65.0%**
Selling gross per technician	–	$9,800
Selling gross per employee	$13,500	$5,200

Dealership overheads

	% Gross
Administration and salaries	8.9%
Training	0.1%
FBT (net of contributions)	0.5%
Payroll tax	3.4%
Superannuation	5.3%
Long service leave	0.5%
Rent (or mortgage interest)	11.4%
Rates and taxes	1.4%
Property maintenance/outside services	2.9%
Telephone	0.7%
Insurance (including workers compensation)	2.0%
Office supplies/stationery	0.7%
Professional fees	0.7%
Data processing	1.7%
Bank charges and taxes	0.5%
Interest (overdraft/working capital)	0.7%
Bad debts	0.1%
Depreciation	2.0%
Electricity	1.1%
Travel and entertainment	0.5%
Miscellaneous	3.3%
Total fixed expenses	48.0%

Overheads are shown as a percentage of total dealership gross profit. This includes gross profit from the New, Used, Parts and Service departments (but excludes net F&I income which is brought into dealership profit at a selling gross level).

Prestige Market


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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)
- 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 2017, dealers in the Prestige Market once again benefited from strong sales growth and were able to translate that into an uplift in gross profit. However, the resources needed to secure that growth came at a cost and ultimately profitability remained flat for the Prestige Benchmark.

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 850 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*	3.5-3.9%
Days to dealership breakeven**	24

*Average Dealer NP%S 1.70%

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

Dealership structure	Orientation	GP %
New	37%	8-10%
Used	15%	10-12%
Parts	13%	22-26%
Service	35%	65-69%
	100%	**13-15%**

Front end (vehicle operations)	52%
Back end (fixed operations)	48%
Finance and insurance income	14% of total gross
Other income and incentives	20% 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	$8,900
Net profit per employee per month	$2,500

Vehicle operations

Product	New	Used
Gross per unit*	$3,150	$2,600
Used/new ratio (retail)	n/a	0.4
Days supply	65-75	65-75
Stock turns p.a.	5-6	5-6
Gross ROI**	55%	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	11	13
Gross per salesperson per month	$36,100	$33,800

Finance and Insurance (F&I)*

F&I Product	New	Used
Finance penetration	32-36%	31-35%
Finance income per contract	$2,500-$2,700	$2,500-$2,700
Finance per retail unit sold	$885	$860
Insurance per retail unit sold	$160	$180

F&I selling gross per vehicle retailed	$860

People	
Vehicles retailed per F&I staff per month	45-55
Salaries and commissions as a % of income	22%
F&I income per dept employee per month	$56,100

*The F&I Benchmarks reflect the top performances in the current market.
With significant regulatory change due in late 2018, many dealers are looking to restructure their F&I processes. In particular dealers are looking to lift new finance penetration to over 45% in order to offset expected declines in revenue per contract.

Fixed operations

Parts department	Sales mix %	GP %
Retail/counter	4%	20%
Wholesale/trade	31%	21%
Workshop	30%	33%
Warranty	19%	11%
Internal	16%	20%
Total	**100%**	**23%**

Operational benchmarks	
Days supply	55-65
Stock turns p.a.	6-7
Monthly sales per employee	$89,400
Monthly gross per employee	$20,600
$ Sales per $ salary	$21.00

Service department	Sales mix %	GP %
Labour		
– Retail	58%	80%
– Warranty	16%	74%
– Internal	26%	78%
Total labour sales	**100%**	**78%**
Sublet sales		13%
Total gross profit (% sales)		**67%**

Operational benchmarks	
Performance index (productivity x efficiency)	95-105%
Monthly labour sales per technician	$18,700
Monthly labour gross per technician	$14,600
Parts/labour ratio	$0.70
Ratio of chargeable to non-chargeable	1.8-2.0
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 % Gross	New $/Unit	Used % Gross	Used $/Unit
Gross*	100%	3,150	100%	2,600
Sales staff salaries and comms	21.3%	671	20.3%	528
Manager salaries and comms	7.3%	230	8.9%	231
Other salaries	5.7%	180	5.4%	140
Pre-delivery costs	7.0%	221	–	–
Free service/policy	1.4%	44	–	–
Used warranty	–	–	2.0%	52
Advertising	9.2%	290	8.0%	208
Training	0.5%	16	0.3%	8
Floorplan	10.4%	328	2.8%	73
Demonstrator expenses	2.8%	88	2.2%	57
Selling gross	**34.4%**	**$1,082**	**50.1%**	**$1,303**

	New	Used
Selling gross per salesperson	$12,400	$16,900
Selling gross per employee	$6,500	$9,400

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

Fixed operations	Parts % gross	Service % gross
Salaries (non-chargeable)	23.0%	24.0%
Advertising and promotion	0.5%	0.9%
Training	0.3%	1.5%
Policy/freight	1.0%	1.6%
Tools and supplies	0.2%	0.6%
Equipment and vehicle maintenance	1.0%	3.1%
Sick/holiday – technicians	–	6.0%
Selling gross	**74.0%**	**62.3%**

	Parts	Service
Selling gross per technician	–	$9,100
Selling gross per employee	$15,200	$6,000

Dealership overheads

	% Gross
Administration and salaries	8.6%
Training	0.1%
FBT (net of contributions)	0.6%
Payroll tax	3.2%
Superannuation	5.0%
Long service leave	0.4%
Rent (or mortgage interest)	11.5%
Rates and taxes	1.5%
Property maintenance/outside services	3.0%
Telephone	0.7%
Insurance (including workers compensation)	1.9%
Office supplies/stationery	0.6%
Professional fees	0.6%
Data processing	1.6%
Bank charges and taxes	0.5%
Interest (overdraft/working capital)	0.4%
Bad debts	0.1%
Depreciation	1.9%
Electricity	1.1%
Travel and entertainment	0.6%
Miscellaneous	2.6%
Total fixed expenses	**47.0%**

Overheads are shown as a percentage of total dealership gross profit. This includes gross profit from the New, Used, Parts and Service departments (but excludes net F&I income which is brought into dealership profit at a selling gross level).

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)
- 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).

While Luxury dealers saw some growth in top-line turnover during 2017, this was accompanied by a fall in the gross margins for vehicles sales. Coupled with rises in fixed and semi-fixed expenses, this led the Luxury Benchmark for net profit to fall quite significantly.

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 850 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*	2.7-3.1%
Days to dealership breakeven**	25

*Average Dealer NP%S 1.2%

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

Dealership structure	Orientation	GP %
New	39%	7-9%
Used	11%	8-10%
Parts	15%	22-26%
Service	35%	65-69%
	100%	11-13%

Front end (vehicle operations)	50%
Back end (fixed operations)	50%
Finance and insurance income	10% of total gross
Other income and incentives	23% 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	$10,600
Net profit per employee per month	$2,600

Vehicle operations

Product	New	Used
Gross per unit*	4,350	2,400
Used/new ratio (retail)	n/a	0.50
Days supply	70-80	65-75
Stock turns p.a.	4-5	5-6
Gross ROI**	40%	55%

* 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	8	14
Gross per salesperson per month	$33,100	$33,600

Finance and Insurance (F&I)*

F&I Product	New	Used
Finance penetration	34-38%	30-34%
Finance income per contract	$2,600-$2,800	$2,300-$2,500
Finance per retail unit sold	$970	$720
Insurance per retail unit sold	$190	$170

F&I selling gross per vehicle retailed	$850

People	
Vehicles retailed per F&I staff per month	45-50
Salaries and commissions as a % of income	23%
F&I income per dept employee per month	$55,300

*The F&I Benchmarks reflect the top performances in the current market.
With significant regulatory change due in late 2018, many dealers are looking to restructure their F&I processes. In particular dealers are looking to lift new finance penetration to over 45% in order to offset expected declines in revenue per contract.

Fixed operations

Parts department	Sales mix %	GP %
Retail/counter	6%	22%
Wholesale/trade	34%	21%
Workshop	29%	33%
Warranty	19%	11%
Internal	12%	21%
Total	100%	23%

Operational benchmarks	
Days supply	55-65
Stock turns p.a.	6-7
Monthly sales per employee	$91,000
Monthly gross per employee	$21,000
$ Sales per $ salary	$22.00

Service department	Sales mix %	GP %
Labour		
– Retail	58%	78%
– Warranty	16%	73%
– Internal	26%	80%
Total labour sales	100%	77%
Sublet sales		12%
Total gross profit (% sales)		68%

Operational benchmarks	
Performance index (productivity x efficiency)	95-105%
Monthly labour sales per technician	$20,700
Monthly labour gross per technician	$15,900
Parts/labour ratio	$0.80
Ratio of chargeable to non-chargeable	1.7-2.1
Parts and service absorption	50-55%
Retention – relative service size**	$2,300

**Labour sales per new retail unit sold per month

Department profitability

	New		Used	
Vehicle operations	**% Gross**	**$/Unit**	**% Gross**	**$/Unit**
Gross*	100%	4,350	100%	2,400
Sales staff salaries and comms	21.0%	914	20.0%	480
Manager salaries and comms	7.0%	305	9.8%	235
Other salaries	6.0%	261	3.0%	72
Pre-delivery costs	6.5%	283	–	–
Free service/policy	1.0%	44	–	–
Used warranty	–	–	1.8%	43
Advertising	11.0%	479	8.0%	192
Training	0.7%	30	0.3%	7
Floorplan	10.0%	435	3.7%	89
Demonstrator expenses	5.0%	218	6.5%	156
Selling gross	31.8%	$1,381	46.9%	$1,126

Selling gross per salesperson	$10,500	$15,800
Selling gross per employee	$5,500	$8,750

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

Fixed operations	**Parts % gross**	**Service % gross**
Salaries (non-chargeable)	22.0%	25.5%
Advertising and promotion	0.5%	1.0%
Training	0.5%	2.5%
Policy/freight	1.5%	1.5%
Tools and supplies	0.2%	1.0%
Equipment and vehicle maintenance	1.0%	7.0%
Sick/holiday – technicians	–	4.5%
Selling gross	74.3%	57.0%

Selling gross per technician	–	$9,100
Selling gross per employee	$15,600	$6,000

Dealership overheads

	% Gross
Administration and salaries	8.2%
Training	0.1%
FBT (net of contributions)	0.7%
Payroll tax	2.8%
Superannuation	4.5%
Long service leave	0.5%
Rent (or mortgage interest)	12.8%
Rates and taxes	1.5%
Property maintenance/outside services	2.2%
Telephone	0.6%
Insurance (including workers compensation)	2.1%
Office supplies/stationery	0.7%
Professional fees	1.1%
Data processing	1.6%
Bank charges and taxes	0.8%
Interest (overdraft/working capital)	0.7%
Bad debts	0.1%
Depreciation	1.9%
Electricity	1.1%
Travel and entertainment	0.6%
Miscellaneous	2.6%
Total fixed expenses	**47.0%**

Overheads are shown as a percentage of total dealership gross profit. This includes gross profit from the New, Used, Parts and Service departments (but excludes net F&I income which is brought into dealership profit at a selling gross level).

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	$224	$290	$479
Average dealers	$226	$271	$440

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*	7%	12%

Units per month (based on BM)	Volume	Prestige	Luxury
Test drives*	25	24	17
Offers*	20	18	13
Sales*	**12**	**11**	**8**
F&I contracts*	4	4	3

* % 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.

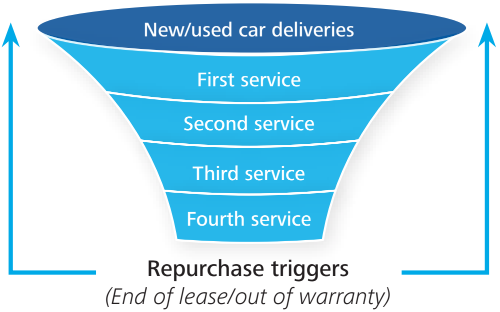
Service retention

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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