

Audience Action Plan

Strategic approach to response and recovery



2020 Sales recovery



Worst is behind us as vehicle sales grew more than **70%** from April to May



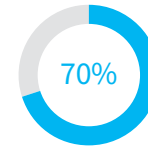
Public transportation concerns along with low fuel costs could yield **incremental vehicle purchases** in the coming months and years



3 million leases will expire before the end of 2020 representing a ripe opportunity to reach consumers ready to buy



Engage opportunistic consumers now to ensure business continuity in 2021 by **leveraging better consumer data**



Advertising during COVID-19

Over 70% of consumers either agree or are indifferent about marketing during the coronavirus outbreak (eMarketer 2020)



Consumer loyalty

Nomads - consumers who don't demonstrate loyalty to specific auto brands - represent over half of the buyers that are in-market now - this represents a critical conquest opportunity



Nearly 7 million new retail vehicles to be sold between May-December 2020

9 million in-market consumers are ready to buy without strong loyalty to a specific brand

3 million consumers are coming off lease this year

100+ new vehicle introductions and refreshes are planned for 2020-2021

1.4 million in-market US households own a discontinued brand

Five-point action plan

- 1 Maintain loyalty** – protect the base with a sound communication plan and going back to fundamentals
- 2 Eliminate waste** – mass marketing is out, data-driven performance marketing becomes the new normal
- 3 Capitalize on opportunities** – off-lease and deal-seekers are ready to hear about options
- 4 Leverage incentives** – deal terms are better than ever
- 5 Measure what matters** – measuring vehicle sales demonstrates true ROI