



LOTLINX COVID-19 MARKET ANALYSIS



At times of crisis, all dealers and automotive partners need to be armed with **the data** necessary to make **the smartest decisions** for their business.

This market overview analyzes current government, OEM, and consumer responses to the COVID-19 outbreak, as well as predictions for the future impact of the pandemic.

- **Trajectory:** China started seeing reversal of cases 4 weeks post quarantine and 8 weeks post initial panic, and its believed that the U.S. will follow a similar trajectory.
- **TV/Radio/Internet/Streaming** will primarily be consumed at the home.
 - More in home: Video, desktop traffic, streaming music and TV.
 - Significantly less Out of Home: mobile.
- **Market Presence:** We are advising our dealers to consider carefully any adjustments to their marketplace presence, and to maintain a strong bias toward preserving all low funnel traffic to SRP, VDP or service pages.
 - These types of marketing are the lowest funnel customers and typically the most likely to buy a vehicle or to schedule a service campaign. We recommend dealers to reassess their current marketing efforts and consider reducing spend on branding campaigns and third-party listing sites.
- **Consumer behavior** will change during these turbulent times, but they will still expect you to offer them insight into your brand.
- **Digital Retailing:** Dealers offering Free Home Delivery, Online Checkout, Over the Phone Sales, Delivery in the Parking Lot will garner more business over the next few months. We believe this will also speed up the Digital Retailing portion of your business after the market recovers. READ *“Just Faster”* by Brian Pasch

1.

Schedule a walk through of recommendations designed to maximize your outcomes with a dedicated LotLinX inventory strategist

2.

Evaluate the opportunities, not just problems, in your current market

3.

Find ways to leverage your existing services that will provide long-term support for current and potential customers

Marketing

- Assess your current marketing strategy
- Avoid removing all ads, especially anything that is low funnel traffic to SRP, VDP or service
- Analyze and re-prioritize marketing channels during the outbreak
- Consider reducing marketing spend on branding campaigns and third party listing sites

Branding

- Adjust marketing message
- Communicate how your dealership is being responsible and responding to the pandemic
- Align your messaging with Tier I and Tier II to have a consistent, strong brand statement

Maintain an online presence:

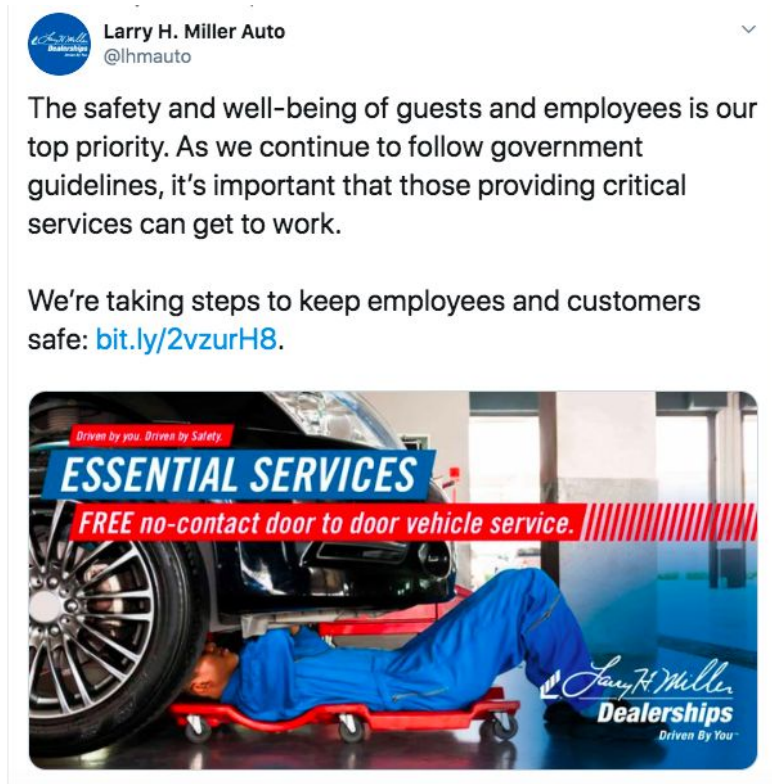
Consumers are still shopping for cars, and right now, they're online more than ever. Businesses that stop advertising in times of crisis are likely to lose share of mind and market. Stay present, but acknowledge the issue at hand.

Expand your current services:

Get your finger on the pulse of what consumers need in these turbulent times. Free at home deliveries and online check-outs are just some offerings that can go a long way in a consumer's mind.

Stay informed and inform your consumers:

Inform shoppers of in-stock inventory and available services. Transparently communicate how your business is being responsible, including statements about your strict adherence to CDC guidelines and your commitment to the community.



Focusing on services they *do offer* to help customers stay home and employees stay busy:

- Over-the phone and online service appointments
- Complimentary vehicle pick-up and drop-off services for service appointments

Adhering to social distancing guidelines:

- Fresh pair of gloves, protective seat covers and disinfectant wipes
- Frequent sanitation and additional hand sanitizing dispensers
- Six feet of distance between all customers and employees

By March 22nd, some **dealers began to reassess their marketing strategy**, responding to lockdown orders in their states. Those who did make changes view it as a temporary decision.

92%

Stayed
the course

8%

Re-aligned or paused
digital spend

70%

Of those who shifted
budget were in “shelter in
place” states

LOTLINX COVID-19 MARKET OVERVIEW

1. ECONOMIC IMPACT

4. OEM IMPACT

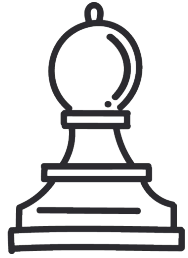
2. CONSUMER BEHAVIOR IMPACT

5. INDUSTRIES BEHAVIOR IMPACT

3. AUTOMOTIVE MARKET IMPACT

6. COMMUNITY IMPACT

ECONOMIC IMPACT



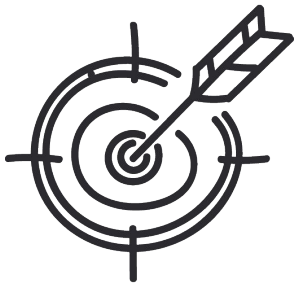
Self-Quarantine



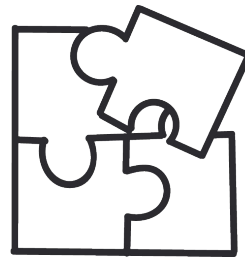
Event Cancellations

Non-Essential Business
Closures

School Closures



COVID-19 Testing



Resources (food, supplies)



Economic Relief



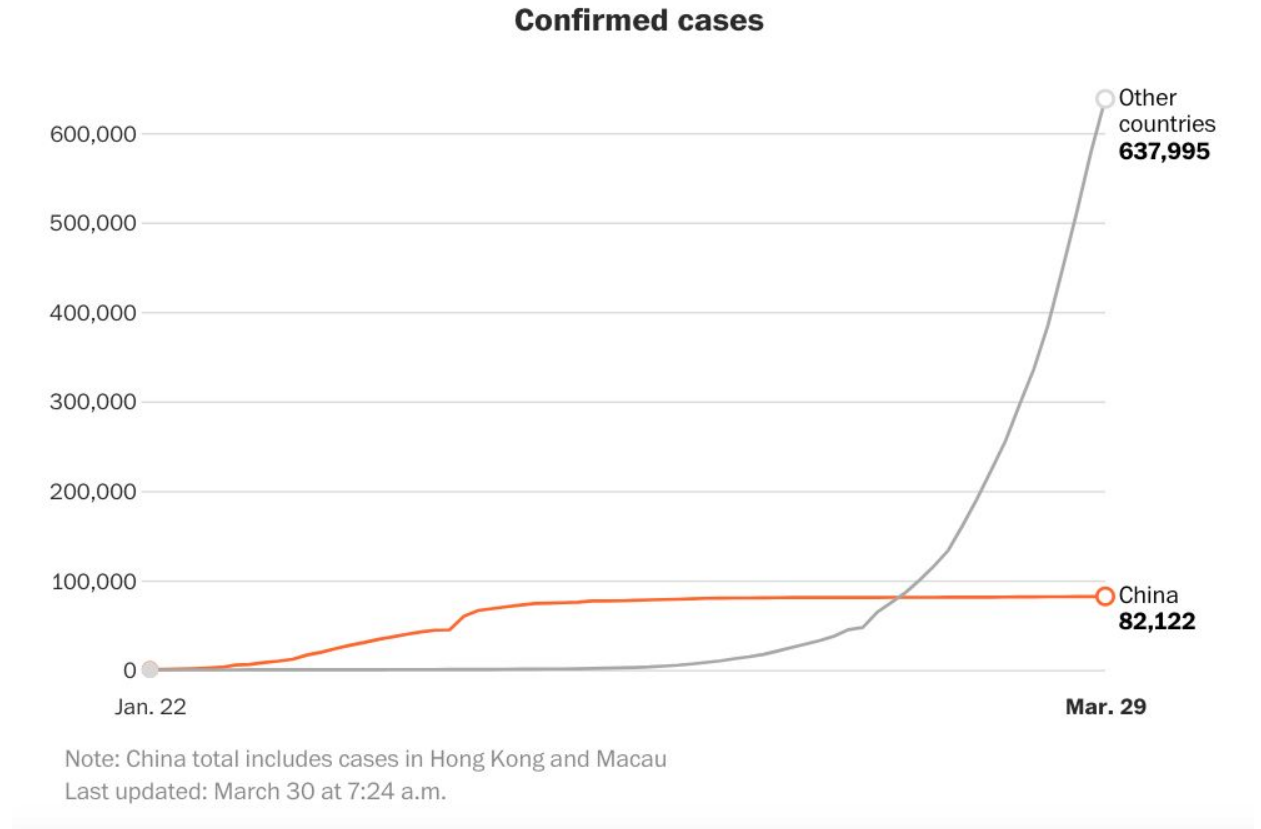
Healthcare Capacity

- Signed into law 3/27/20
- Highlights:
 - **Direct payments:** One-time direct deposit of up to \$1,200 to taxpaying Americans. Restrictions apply.
 - **Unemployment:** \$250 billion for an extended unemployment insurance program
 - **Small business relief:** \$350 billion dedicated to preventing layoffs and business closures. Companies with 500 employees> that maintain payroll can receive up to 8 weeks of cash-flow assistance.
 - **Large corporations:** \$500 billion will be allotted to provide loans, loan guarantees, and other investments.
 - **Hospitals and health care:** \$140 billion+ in appropriations to support the U.S. health system, provide personal and protective equipment for health care workers, testing supplies, increased workforce and training, accelerated Medicare payments, etc.
 - **Coronavirus testing:** All testing and potential vaccines for COVID-19 will be covered at no cost to patients.
 - **States and local governments:** \$150 billion to state, local and tribal governments. \$30 billion for states and educational institutions, \$45 billion for disaster relief, and \$25 billion for transit programs.
 - **Agriculture:** Agriculture Department bailout program increased to \$50 billion

[Source: The CARES Act Has Passed: Here Are The Highlights](#)

China started seeing reversal of cases as early as
4 weeks post quarantine &
8 weeks post initial panic.

Experts predict that the U.S. should follow a similar trajectory.



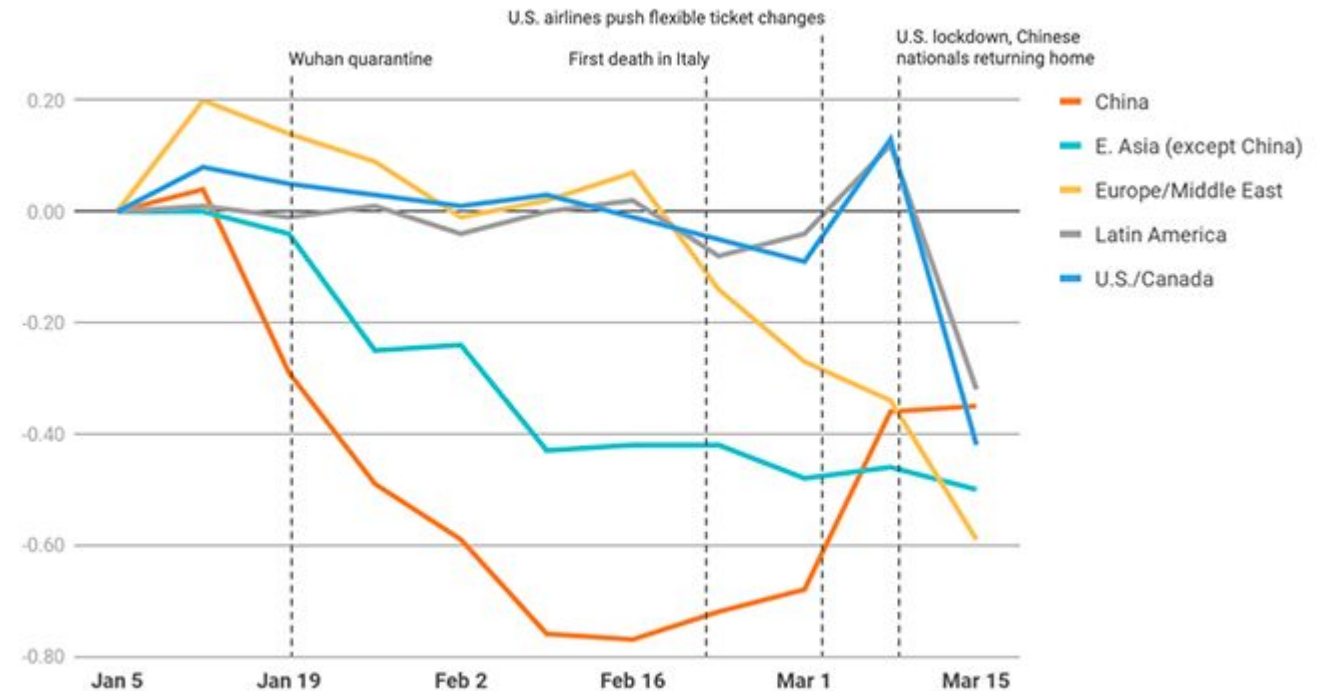
[Source: Mapping the spread of the Coronavirus in the U.S. and worldwide. The Washington Post](#)

In-market travel decline in China reversed

5 weeks post quarantine & 8 weeks post initial panic.

U.S. travel is currently on China's same path of decline due to shelter in place.

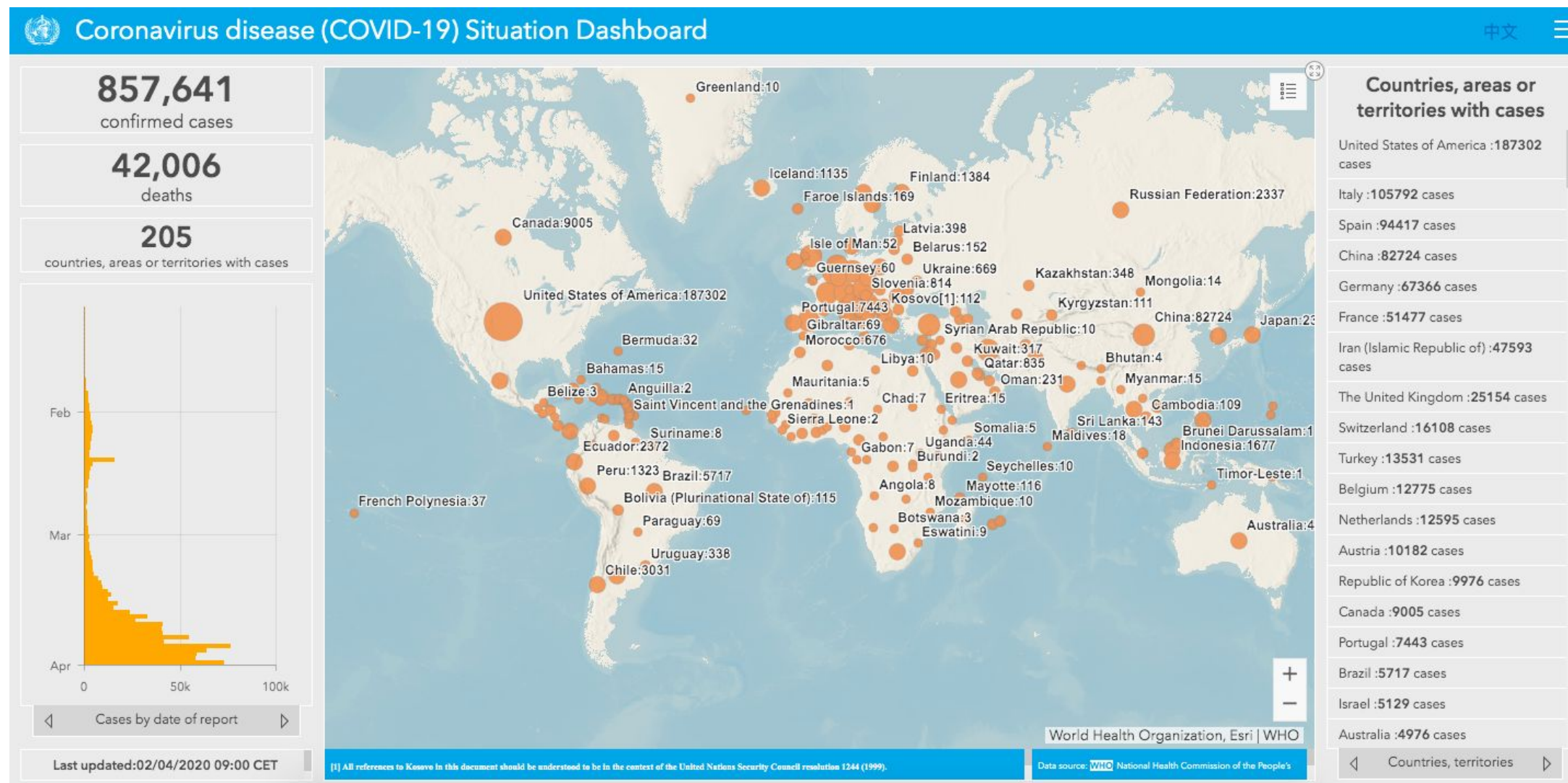
Year Over Year Change in Weekly Flight Search (January–March 21)



Source: Sojern Flight (Airline/OTA/Meta) Data, Flight searches Jan 12 to Mar 21, 2020 vs Jan 13 to Mar 23, 2019

[Source: COVID-19: Insights on Travel Impact. Sojern](#)

Current stages of the impact of COVID-19 around the world:

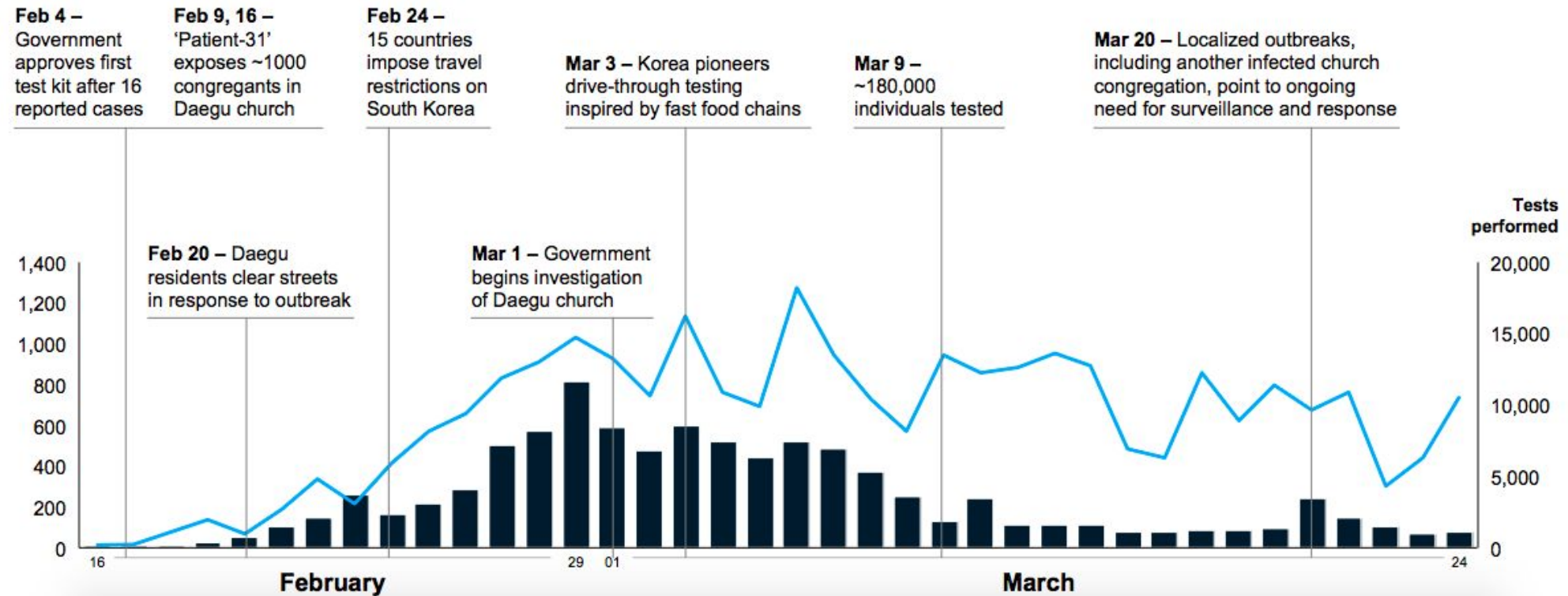


Effects of increased testing has lowered the number of cases in South Korea.

Incremental cases per day and tests performed in South Korea

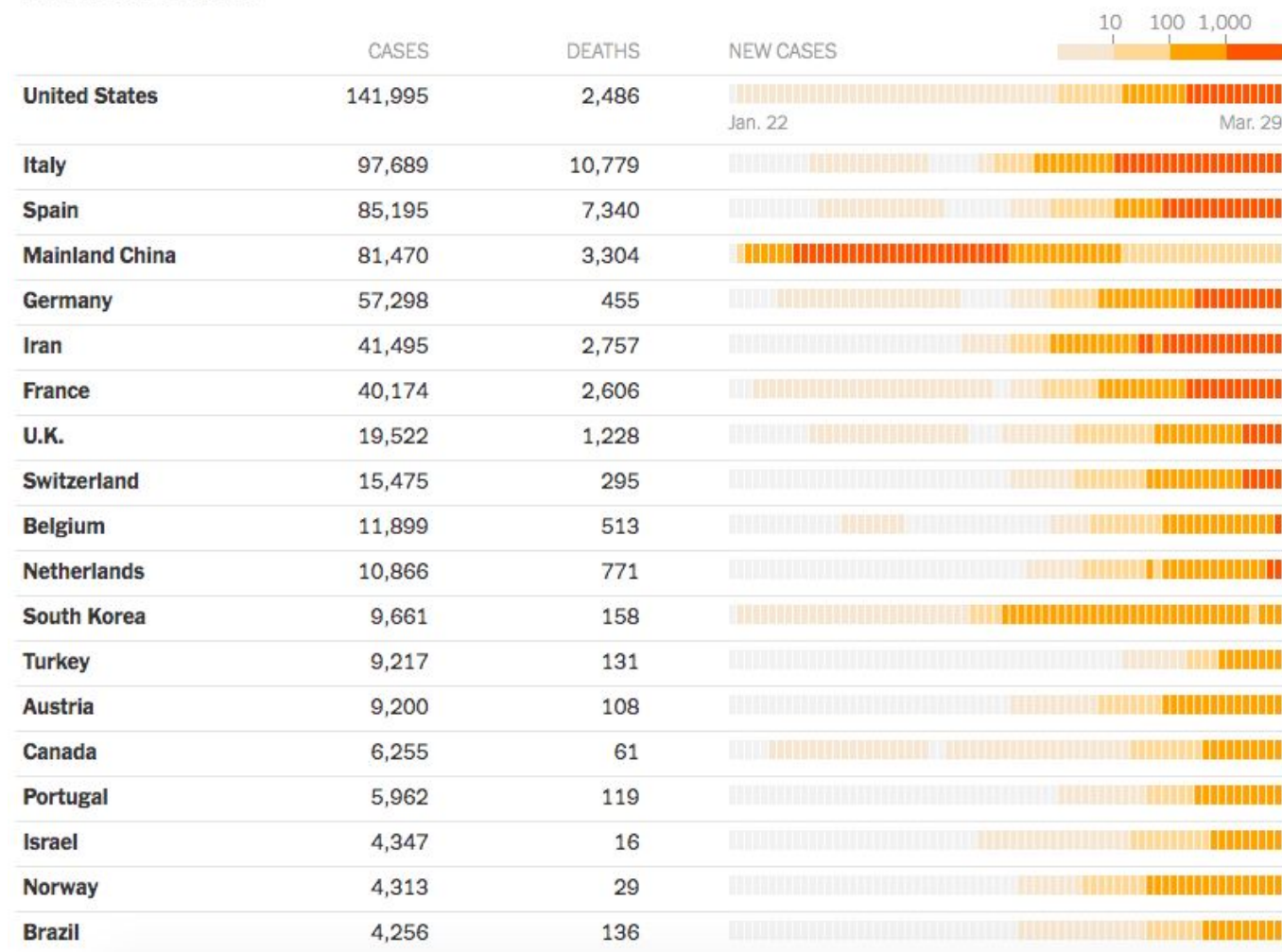
Number of reported cases

— Number of tests performed ■ New reported cases per day



Source: McKinsey & Company COVID-19 Briefing Materials

Confirmed cases



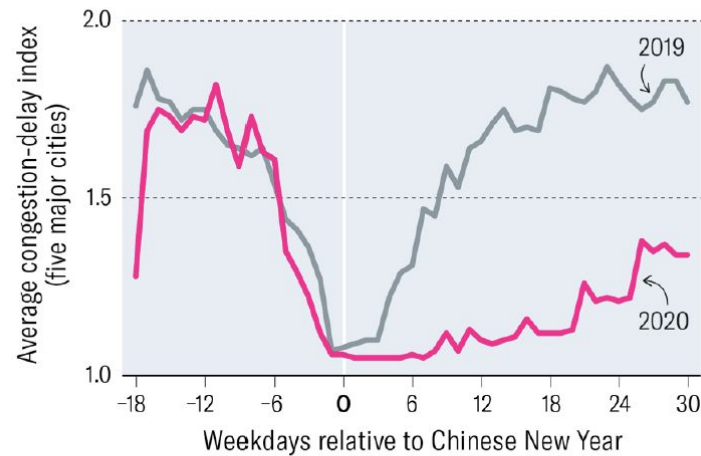
As of March 17h, the **number of cases has started to decline in China** as the country moves crisis response to recovery and post-recovery planning.

However, the U.S. now has the most confirmed cases in the world.

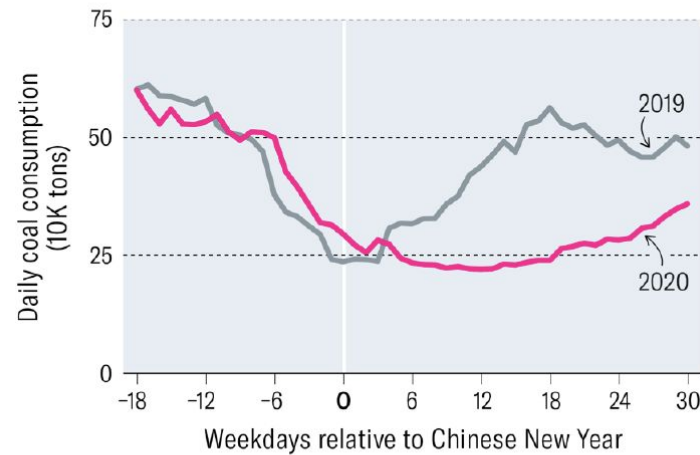
[Source: Coronavirus Map Tracking, The New York Times](#)

China is showing several areas of recovery, with **people and goods starting to move again, an increase in coal consumption, and property transactions resuming.**

PEOPLE & GOODS



COAL CONSUMPTION



PROPERTY TRANSACTIONS



[Source: How Chinese Companies Have Responded to Coronavirus HBR](#)

90%

of **Starbucks stores in China**
will be reopened by the end of
March, including in Wuhan
where the virus originated.



[Source: CNBC](#)

Optimistic that a potential **global economic downturn could be short-lived**, mitigating negative impacts on the worldwide ad market.

Most likely scenario: **“V-Shape”** A classic economic shock, **where growth eventually rebounds**.

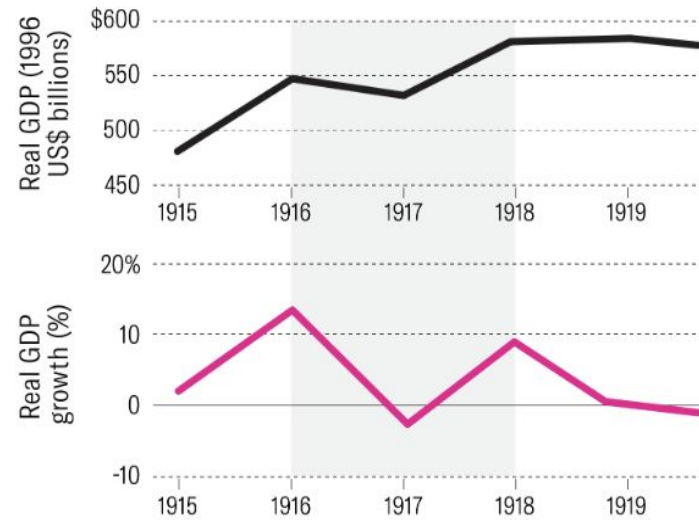
“V” scenario (likely)



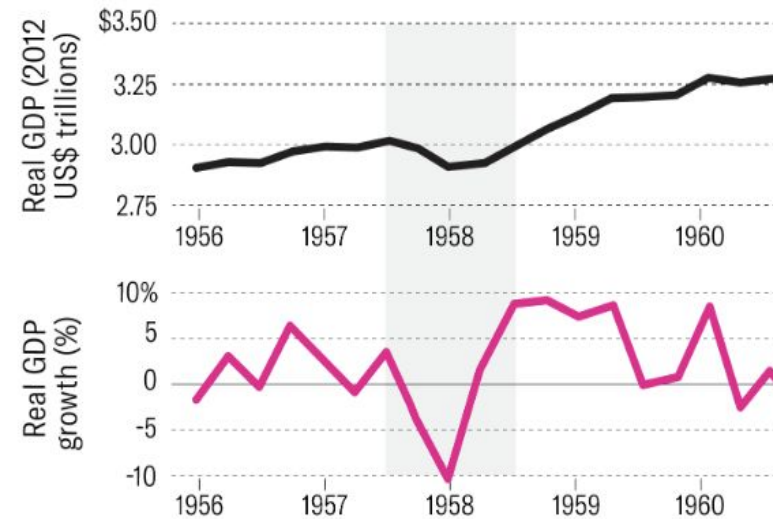
[Source: What Coronavirus Could Mean for the Global Economy. HBR](#)

Past epidemics have all been “V-Shaped”:

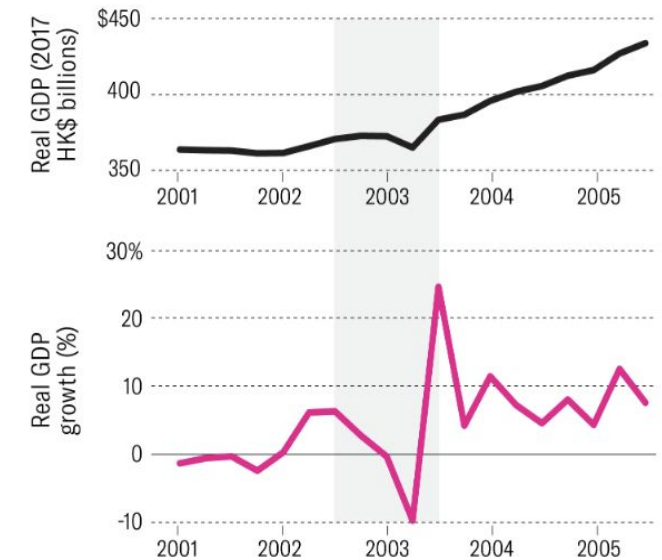
1918 Spanish flu – 675,000 U.S. deaths



1958 H2N2 (“Asian”) flu – 116,000 U.S. deaths



2002 SARS – 286 global deaths



Source: [What Coronavirus Could Mean for the Global Economy. Harvard Business Review](#)

The Coronavirus outbreak has been the **largest reported economic threat** across the globe.

The threat of decreased consumer demand is smallest in North America.

Potential risks to domestic economic growth in the next 12 months, % of respondents, by office location¹

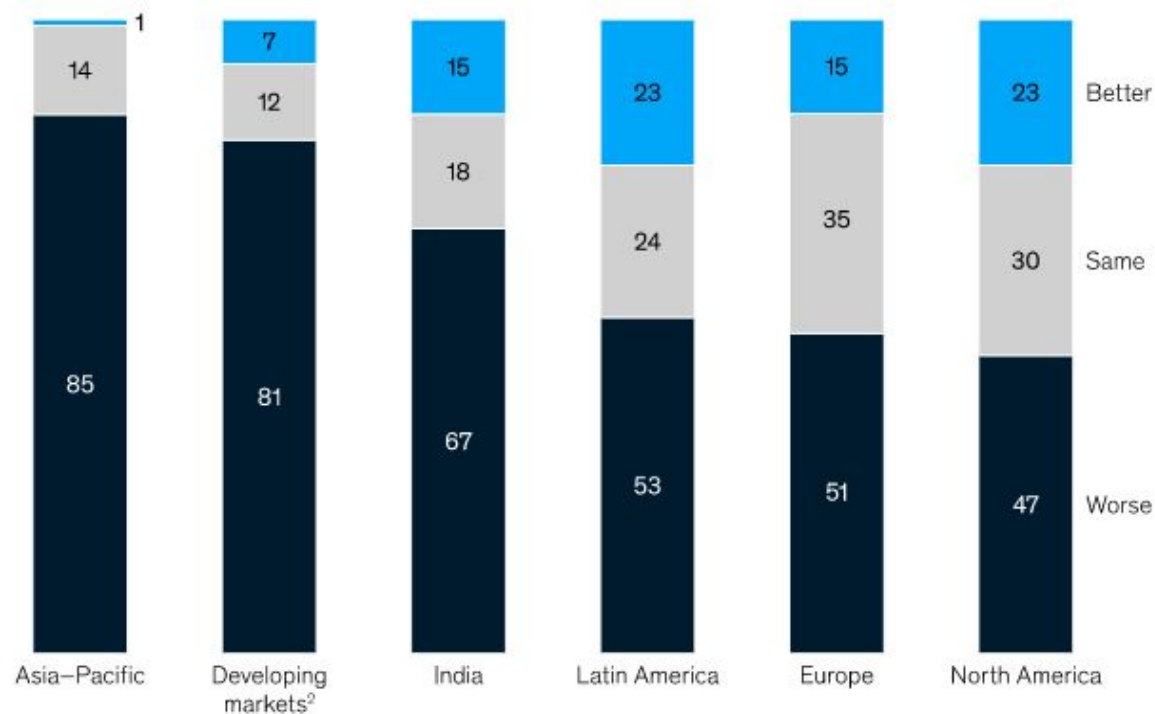


[Source: McKinsey & Company Implications for Business](#)

North America has the most positive economic outlook

compared to six months ago, compared to other regions.

Current economic conditions in respondents' countries, compared with 6 months ago,
% of respondents, by office location¹



¹The online survey was in the field from March 2 to March 6, 2020. Figures may not sum to 100%, because of rounding. In the Asia-Pacific, n = 119; in developing markets, n = 163; in India, n = 101; in Latin America, n = 73; in Europe, n = 436; and in North America, n = 260.

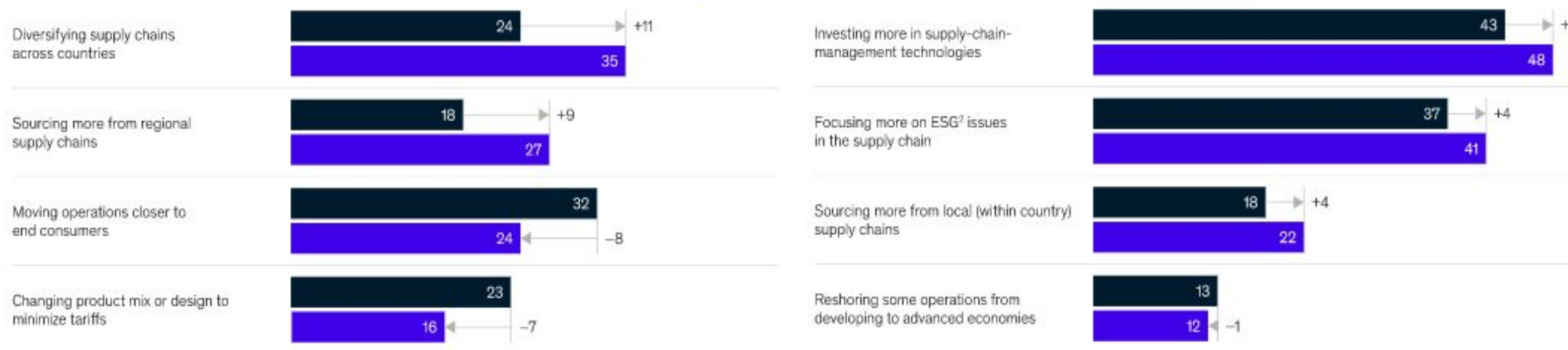
²Includes respondents in China, the Middle East, and North Africa.

Source: McKinsey & Company Implications for Business

Diversifying supply chains and regional sourcing will become priorities for future business strategies.

Biggest changes to companies' globalization strategies in the next 3 years,
% of respondents¹

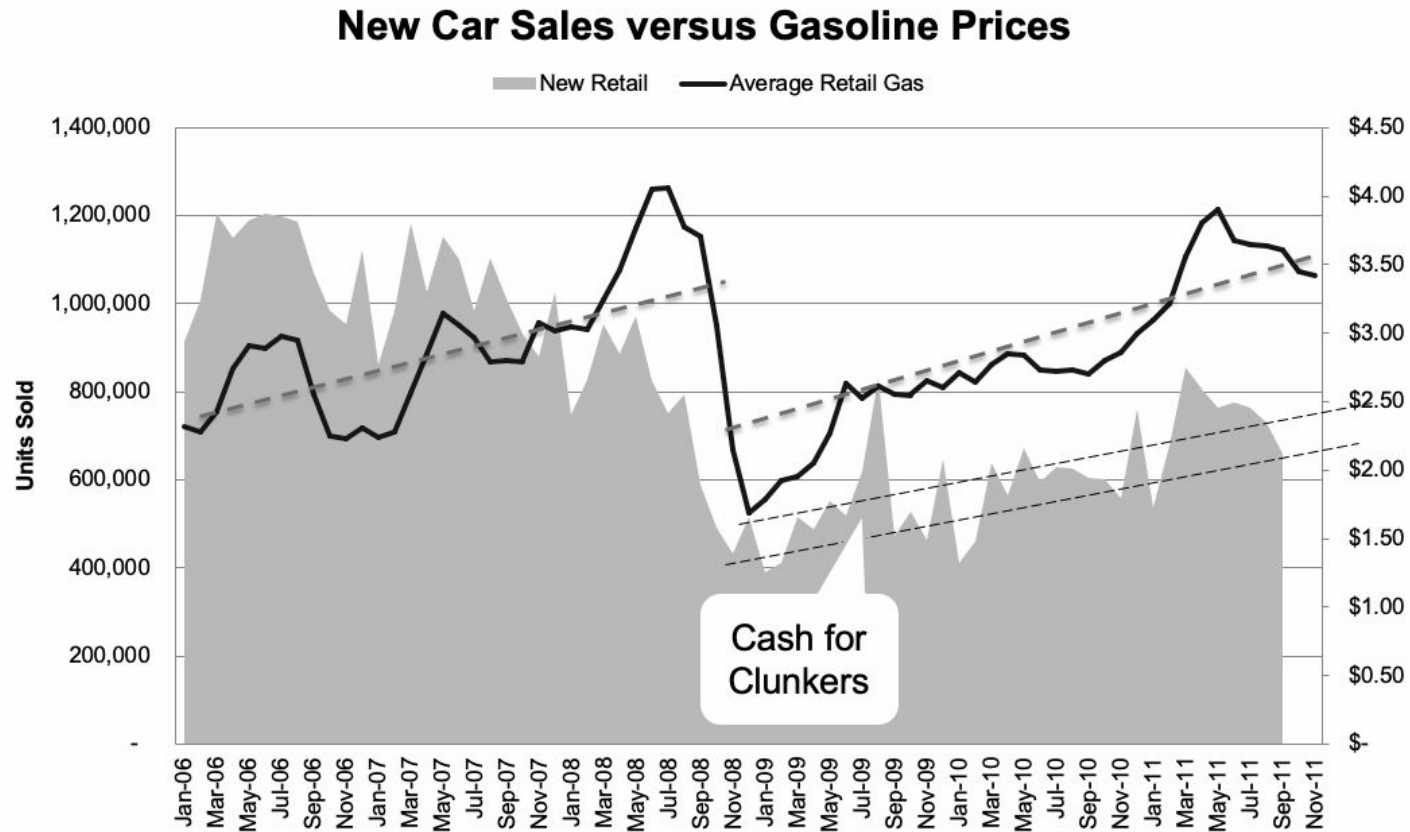
■ Dec 2019
■ Mar 2020



Source: McKinsey & Company Implications for Business

CONSUMER BEHAVIOR IMPACT

Cash for Clunkers showed the power of incentives to drive sales



9.6 million

Sales pace before
Cash for Clunkers

10.7 million

Sales pace following
Cash for Clunkers

[Source: Did 'Cash-for-Clunkers' work as intended?](#)

In 2020, we expect total media ad spending worldwide will reach

\$691.7 billion

up by 7.0% from 2019.



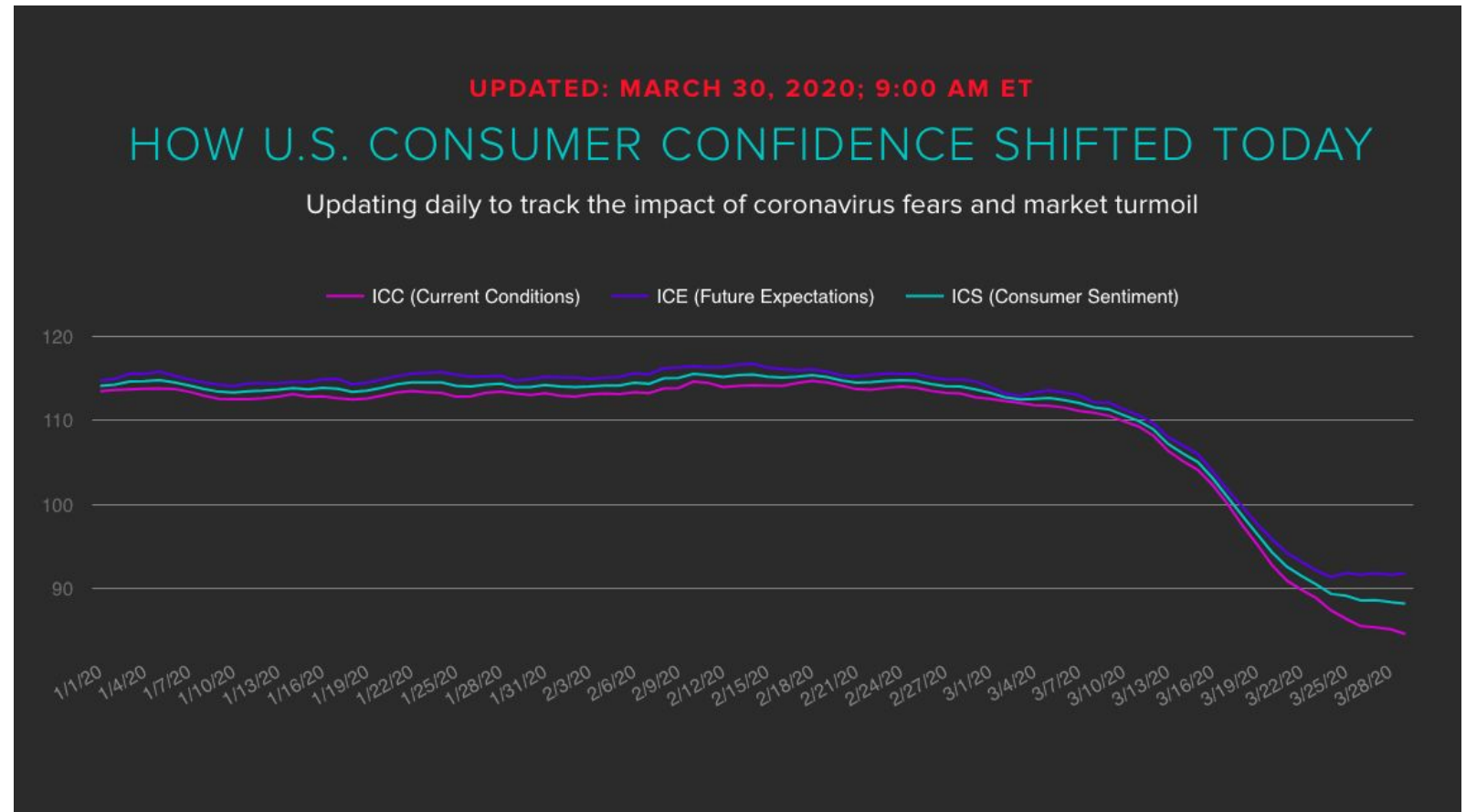
[Source: How COVID-19 Has—And Has Not—Affected Global Ad Spending, E-Marketer](#)

96%

of Gen Zs are concerned

90%

of Baby Boomers are concerned

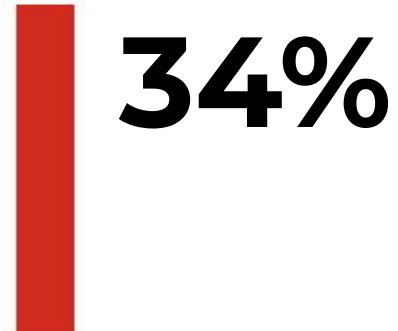


[Source: How U.S. Consumer Confidence Shifted Today, The Morning Consult](#)

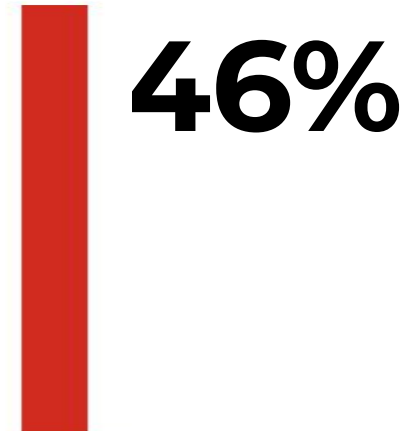
[Source: Coronavirus: how consumers are actually reacting, GlobalWebIndex](#)



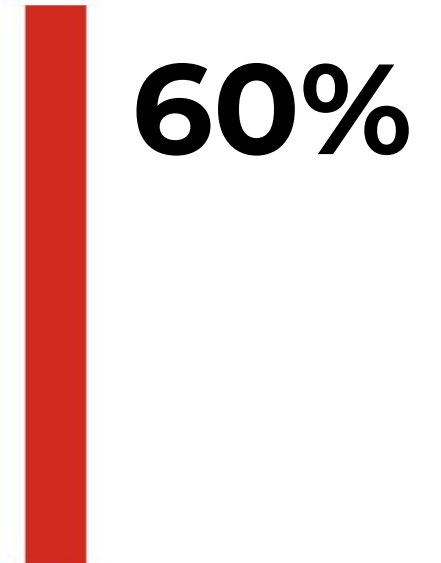
Say they panic about running out of essentials, ending up making panic purchases



Believe this is going to be worse than an economic recession with the risk of people losing jobs



Are worried about falling sick

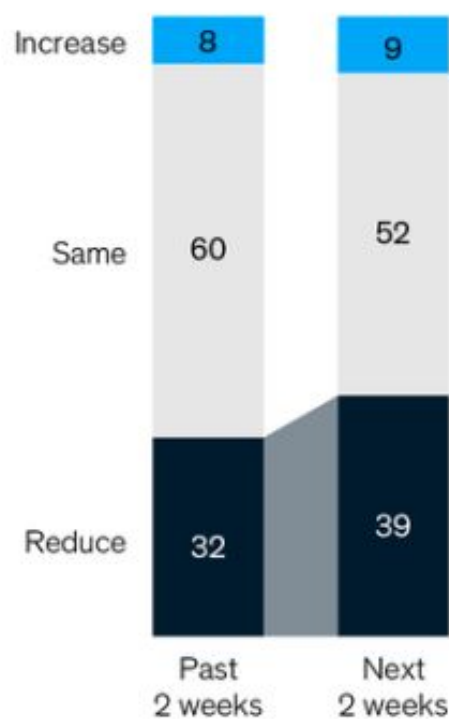


Feel the situation demands them to be more proactive about financial planning and security for the future

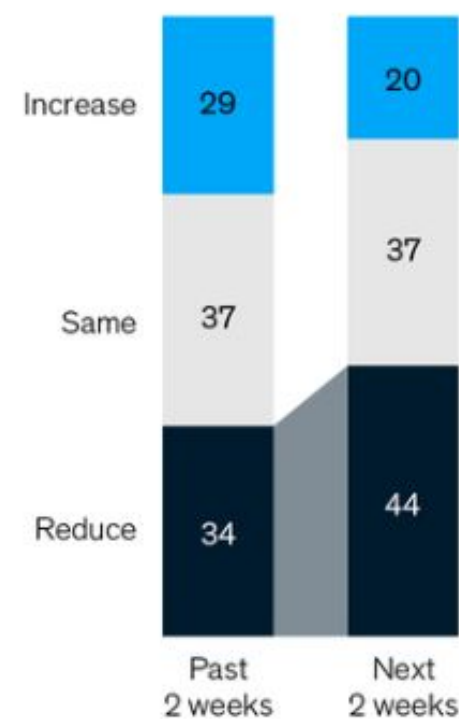
[Source: What do consumers expect from brands? Kantar](#)

1/3 of U.S. consumers already report reduced income, while **70% of respondents** believe their finances will be impacted by more than 2 months.

Change in household income,^{1,2}
% of respondents



Change in household
spending,^{1,2} % of respondents



[Source: McKinsey & Company Implications for Business](#)

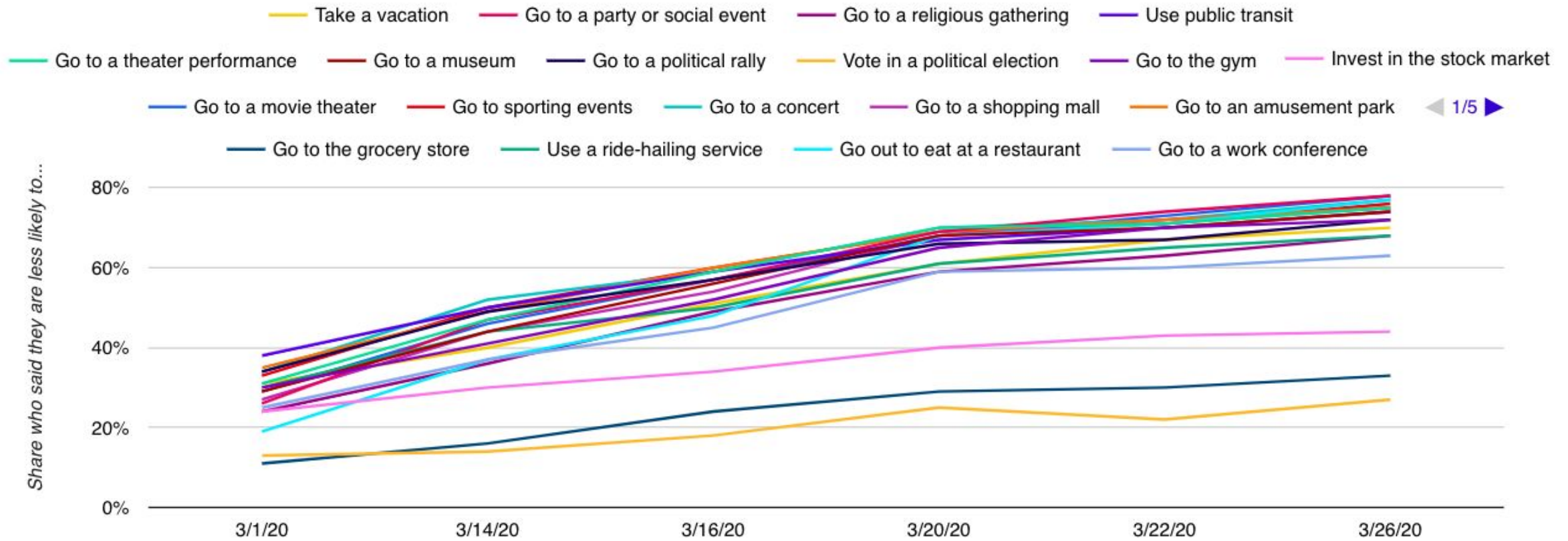
8 in 10 consumers have changed their behaviors

because of the virus and are less likely to participate in out of home activities.



U.S. consumers have been drastically **adjusting their leisure activities** since the outbreak.

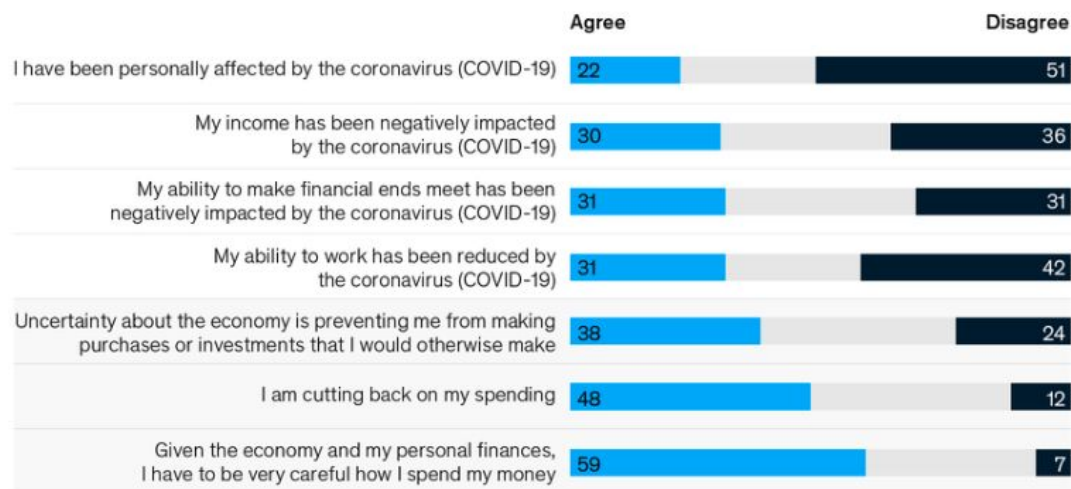
Share of U.S. adults who said they are less likely to do the following, based on fears over the coronavirus



Source: [Tracking Public Opinion on the Coronavirus, The Morning Consult](#)

While many consumers have not yet been personally affected or negatively impacted by the virus, a large percentage are **cutting back on spending and being careful with their money.**

Overall sentiment in the general population in the US,¹ % of respondents



Expected spend per category over the next 2 weeks compared to usual,¹ net intent²

■ Increase ■ Stay the same ■ Decrease

Groceries	+14	Footwear	-47
Snacks	-7	Apparel	-50
Tobacco products	-14	Jewelry	-53
Take out/delivery	-22	Accessories	-55
Alcohol	-23	Entertainment at home	+3
Non-food child products	+4	Books/magazines/newspapers	-10
Household supplies	+1	Consumer electronics	-36
Personal care products	-11	Out of home entertainment	-63
Skincare and makeup	-38	Petcare services	-35
Furnishing and appliances	-44	Fitness and wellness	-40
		Personal care services	-49

Source: McKinsey & Company Implications for Business

↑ 20%

Online

↑ 44%

Mobile gaming

↑ 14%

Watching videos

↑ 14%

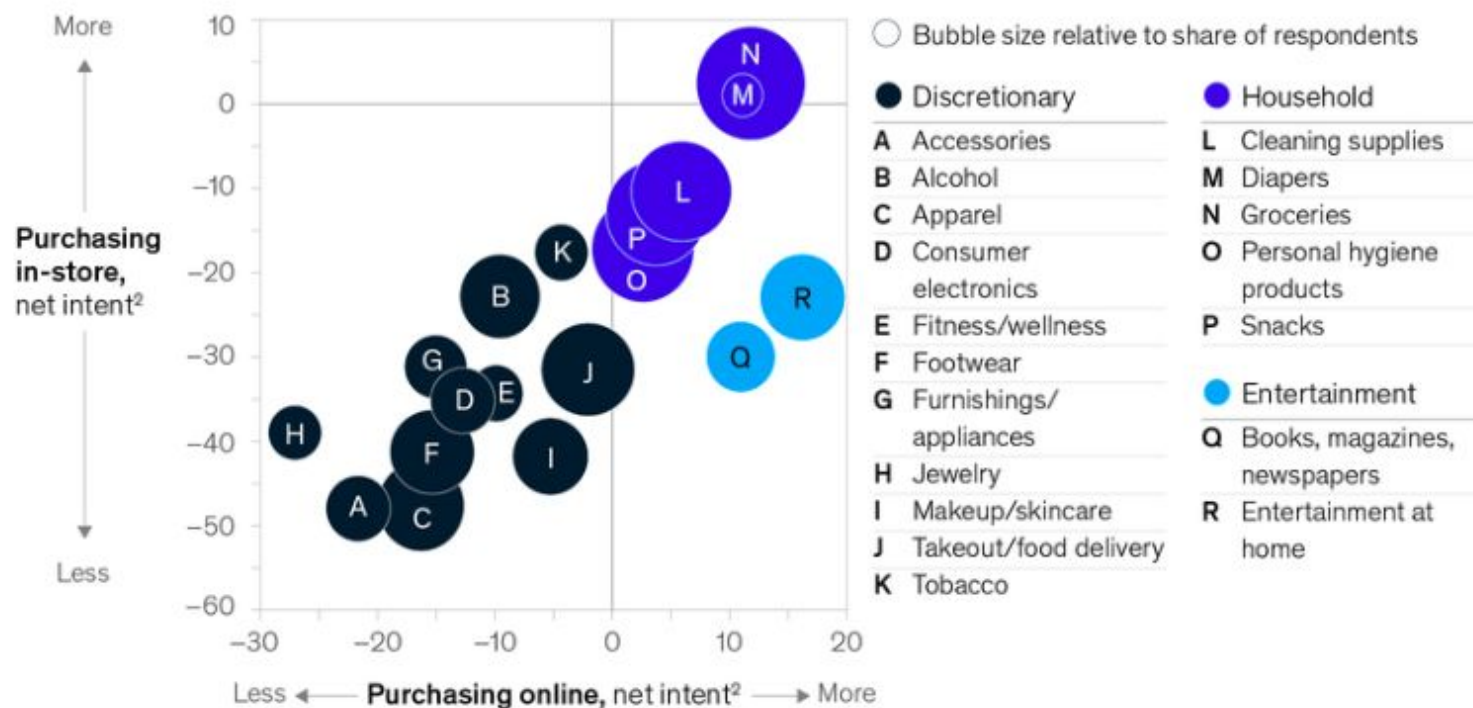
Reading news

[Source: Brand lessons from China in connecting with consumers during COVID-19 outbreak, Warc](#)

Online shopping trends continue to be on the rise, especially for

household essentials and entertainment.

Expected change in shopping channel per category over the next 2 weeks¹



[Source: McKinsey & Company Implications for Business](#)

Consumption of news and media is

**evolving toward
television, online,
& social,**

while moving away from print.

Expected change time allocation over the next 2 weeks,¹ % of respondents

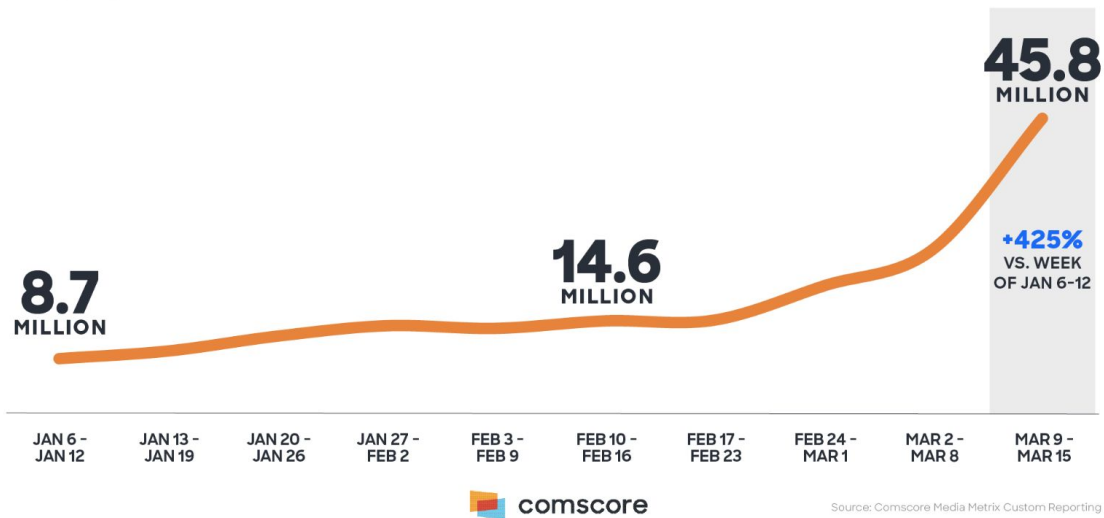
Net intent²

	Increase	Stay the same	Decrease	
Live news	43	46	11	+32
Movies or shows	42	46	12	+29
Reading news online	40	48	13	+27
TV	38	51	12	+26
Texting, chatting, messaging	34	57	9	+25
Video content	33	54	13	+19
Social media	33	53	14	+19
Reading for personal interest	27	53	20	+7
Video games	22	53	25	-3
Online groceries	23	47	30	-7
Reading print news	13	55	32	-19
Working	11	55	34	-24

[Source: McKinsey & Company Implications for Business](#)

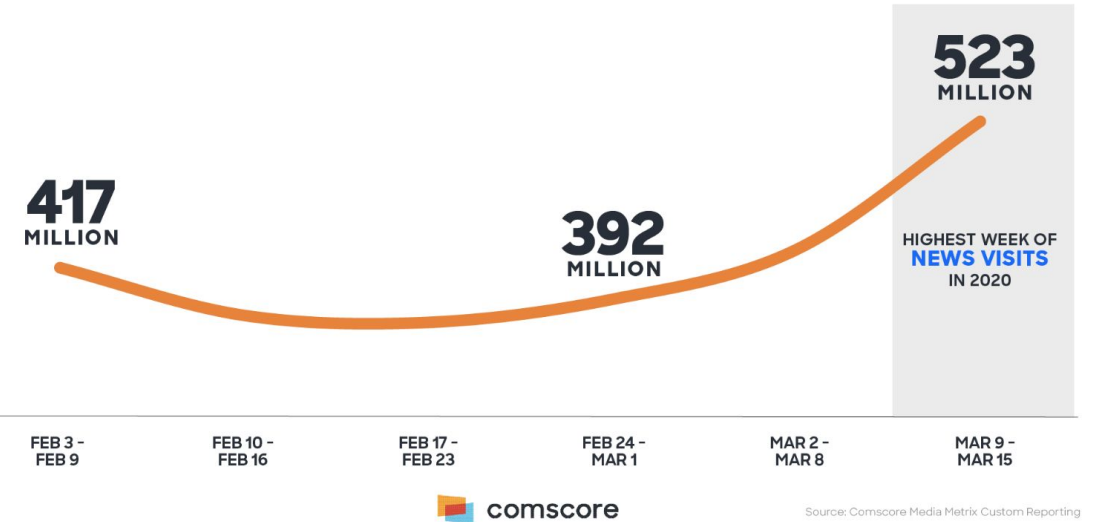
Total Digital Visits to Top Government Sources

CDC, NIH, WHO




Total Digital News Site Visits

AGGREGATE DATA OF ~40 SELECTED NEWS SITES



[Source: Media Consumption during the Coronavirus Pandemic, Comscore](#)

The Myers Report predicts an
**increase in Broadcast
 Network TV, Social Media,
 PR, Video Game Advertising,
 & Content Marketing
 consumption.**

 Comparison of Pre-Coronavirus and Post-Coronavirus The Myers Report 2020 Data and Forecast	% Change		\$ Change		%Loss(Gain)
	2020 Pre	2020 Post	2020 Pre	2020 Post	Post\$ compares to Pre\$
Direct-to-Trade Promotion/Slotting Allowances**	-3.0%	-3.0%	130,403	128,941	-1.1%
Shopper Marketing (FSI's, Consumer Promotion, Co-op, OTT TV)**	-2.3%	-4.0%	79,947	78,595	-1.7%
Direct Mail/ E-Mail Marketing**	-7.0%	-13.8%	28,847	26,725	-7.4%
Search Marketing (Online & Mobile)**	6.0%	4.0%	57,133	56,055	-1.9%
Cable/Satellite Network Television	-3.3%	-6.0%	27,792	27,006	-2.8%
Local & National Spot Broadcast TV	10.0%	7.4%	25,114	24,523	-2.4%
Experiential/Event Marketing (excluding digital)**	-2.4%	-11.8%	22,462	20,299	-9.6%
Print-Originated Newspaper Advertising	-4.6%	0.8%	14,953	15,809	5.7%
Mobile & Apps Advertising (excluding Mobile Search)	18.0%	11.0%	51,633	48,570	-5.9%
Broadcast Network TV	-1.8%	2.2%	19,709	20,513	4.1%
Audio	6.3%	5.9%	19,921	19,850	-0.4%
Consumer Print-Originated Magazine Advertising	-3.4%	-2.8%	12,602	12,682	0.6%
Social Marketing (digital)**	11.1%	12.1%	30,514	30,789	0.9%
Out-of-Home	2.8%	1.3%	9,058	8,928	-1.4%
Branded Entertainment/Product Placement**	1.5%	-1.4%	9,155	8,893	-2.9%
Online-Originated Display (Banner) Advertising	-11.2%	-11.2%	4,557	4,557	0.0%
Yellow Pages **	-3.2%	-3.2%	4,587	4,587	0.0%
Local/Regional Cable TV	4.5%	4.5%	5,235	5,235	0.0%
Business-to-Business Media**	-7.5%	-8.7%	4,390	4,330	-1.4%
Online Originated Video Advertising	19.8%	19.8%	20,742	20,742	0.0%
Public Relations (offline)**	-8.0%	-2.0%	2,330	2,482	6.5%
Broadcast Syndication	-0.6%	-0.6%	2,509	2,509	0.0%
Videogame Advertising/Virtual Gaming Currency	5.5%	6.8%	2,190	2,217	1.2%
Content Marketing/Site Development**	4.3%	11.3%	2,684	2,863	6.7%
Digital Place-Based Video Media (excl. cinema)	3.2%	0.0%	1,377	1,334	-3.1%
Cinema Advertising	0.6%	-6.6%	805	747	-7.2%
Interactive, VOD & Addressable TV Advertising***	38.0%	42.0%	2,536	2,610	2.9%
Hispanic Media	3.2%	3.2%	7,035	7,035	0.0%
TOTAL	1.8%	-0.1%	600,220	589,423	-1.8%

Legacy/Linear Total	-3.9%	-4.8%	350,823	347,483	-1.0%
Digital Total	11.0%	7.7%	249,397	241,940	-3.0%
Media Advertising Total	6.2%	4.8%	227,768	224,864	-1.3%
Media Advertising -- Legacy / Linear	-0.3%	-0.5%	112,622	112,397	-0.2%
Media Advertising -- Digital	13.4%	10.8%	115,147	112,467	-2.3%
** Shopper Marketing/Promotion/Search/PR	-0.8%	-2.9%	372,452	364,559	-2.1%
**Shopper Marketing/Promotion/Search/PR -- Legacy / Linear	-5.5%	-6.8%	238,201	235,086	-1.3%
**Shopper Marketing/Promotion/Search/PR -- Digital	9.0%	5.1%	134,250	129,472	-3.6%

Source: The Myers Report Marketing & Media Economic Data and Forecasts 2000-2025

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[Source: Media Economy: How Far Down is Down? The Myers Report](#)

Across all key dayparts, TV viewing levels are up:

	3/11-3/16 vs 3/2-3/10 % Diff
Daypart	PUT - A25-54
M-F 4A-7A (Loc)	4%
M-F 5A-7A (Loc)	0%
M-F 7A-9A (Loc)	4%
M-F 9A-12P (Loc)	19%
M-F 12P-3P (Loc)	19%
M-F 3P-4P (Loc)	29%
M-F 4P-7P (Loc)	18%
M-F 5P-630P (Loc)	18%
M-F 7P-8P (Loc)	4%
M-Su 8P-11P (Loc)	5%
M-Su 11P-1130P (Loc)	11%
M-Su 1130P-130A (Loc)	10%

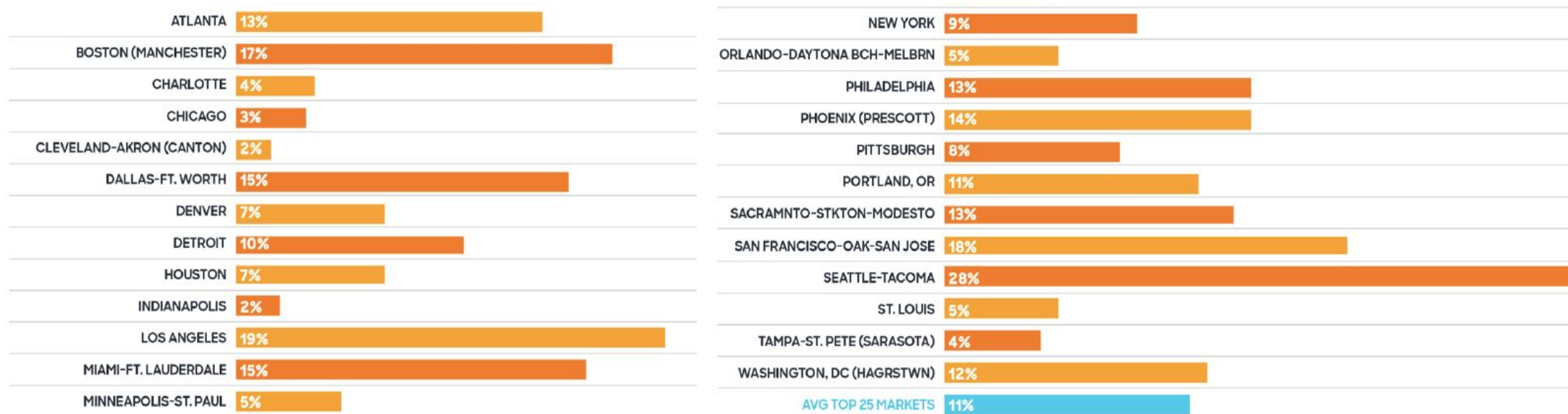
						3/11-3/16 vs 3/2-3/10 % Diff	Date Ranges: 03/11/2020- 03/16/2020			Date Ranges: 03/02/2020- 03/10/2020		
						P25-54	P25-54			P25-54		
Market	Daypart	Net	Stn	Rtg	PUT	Rtg	Imps	PUT	Rtg	Imps	PUT	
NEW YORK	M-F 4A-7A (Loc)	NBC	WNBC	19%	4%	0.57	40.3	7.41	0.48	33.8	7.13	
NEW YORK	M-F 5A-7A (Loc)	NBC	WNBC	10%	0%	0.68	47.6	8.00	0.62	43.9	8.00	
NEW YORK	M-F 7A-9A (Loc)	NBC	WNBC	1%	4%	1.05	74.0	12.4	1.04	73.6	11.9	
NEW YORK	M-F 9A-12P (Loc)	NBC	WNBC	30%	19%	0.60	42.4	13.6	0.46	32.7	11.4	
NEW YORK	M-F 12P-3P (Loc)	NBC	WNBC	13%	19%	0.35	24.9	14.6	0.31	22.2	12.2	
NEW YORK	M-F 3P-4P (Loc)	NBC	WNBC	49%	29%	0.82	57.8	16.80	0.55	38.7	13	
NEW YORK	M-F 4P-7P (Loc)	NBC	WNBC	42%	18%	1.18	82.8	21.9	0.83	58.3	18.6	
NEW YORK	M-F 5P-630P (Loc)	NBC	WNBC	40%	18%	1.16	81.9	22.4	0.83	58.6	19	
NEW YORK	M-F 7P-8P (Loc)	NBC	WNBC	19%	4%	1.12	79.1	29	0.94	66.6	27.8	
NEW YORK	M-Su 8P-11P (Loc)	NBC	WNBC	-16%	5%	1.05	74.2	33.5	1.25	88.2	31.9	
NEW YORK	M-Su 11P-1130P (Loc)	NBC	WNBC	20%	11%	1.28	90.4	27.8	1.07	75.6	25.1	
NEW YORK	M-Su 1130P-130A (Loc)	NBC	WNBC	4%	10%	0.70	49.6	17.8	0.67	47.5	16.1	

Source: WNBC (New York)

The top 25 local markets saw, on average, **an 11 percent increase in daily households viewing local news.**

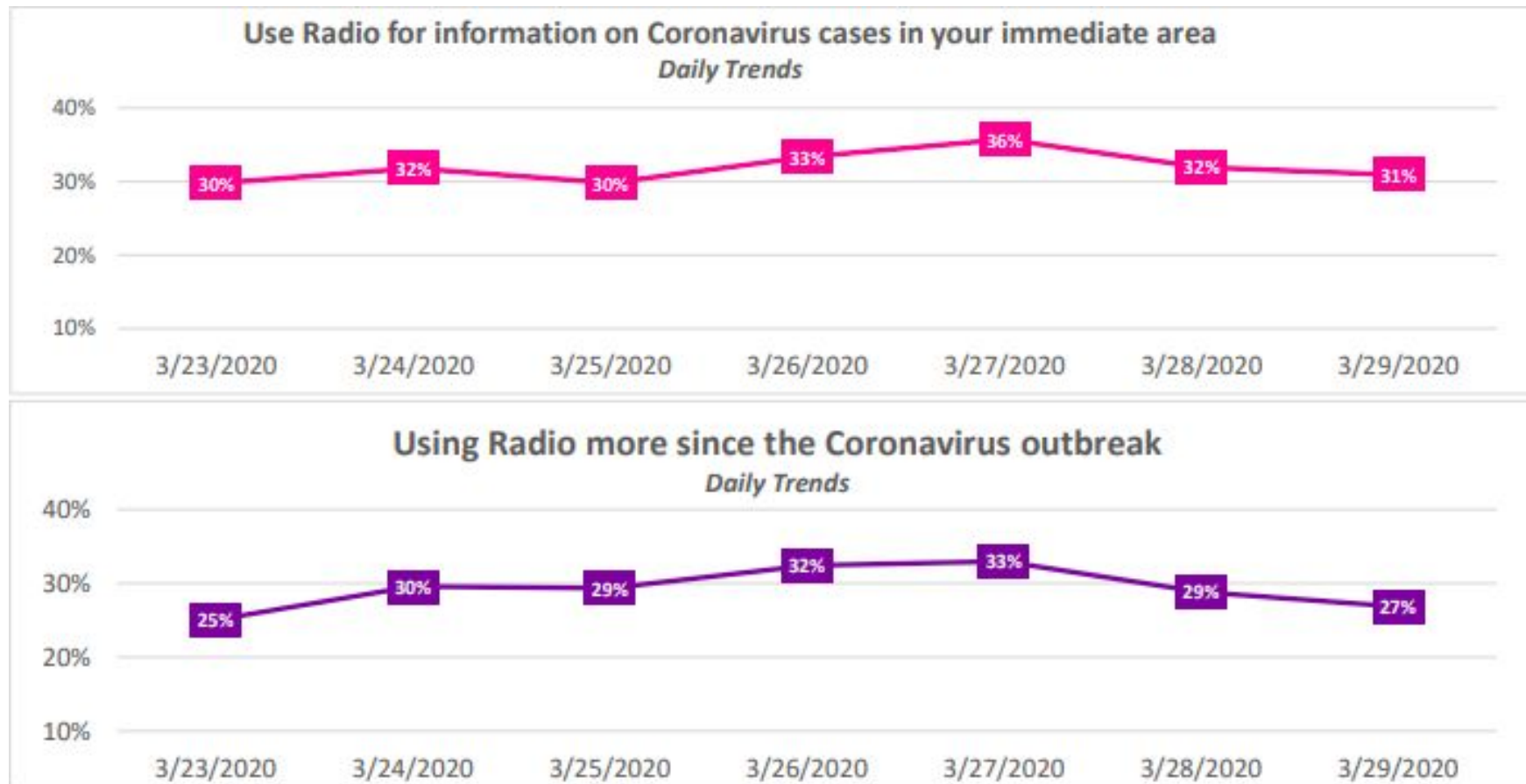
Local Newscasts: Average Household Viewership in Top 25 Markets

PERCENT CHANGE – WEEK OF MARCH 9 VS. WEEK OF FEB. 10



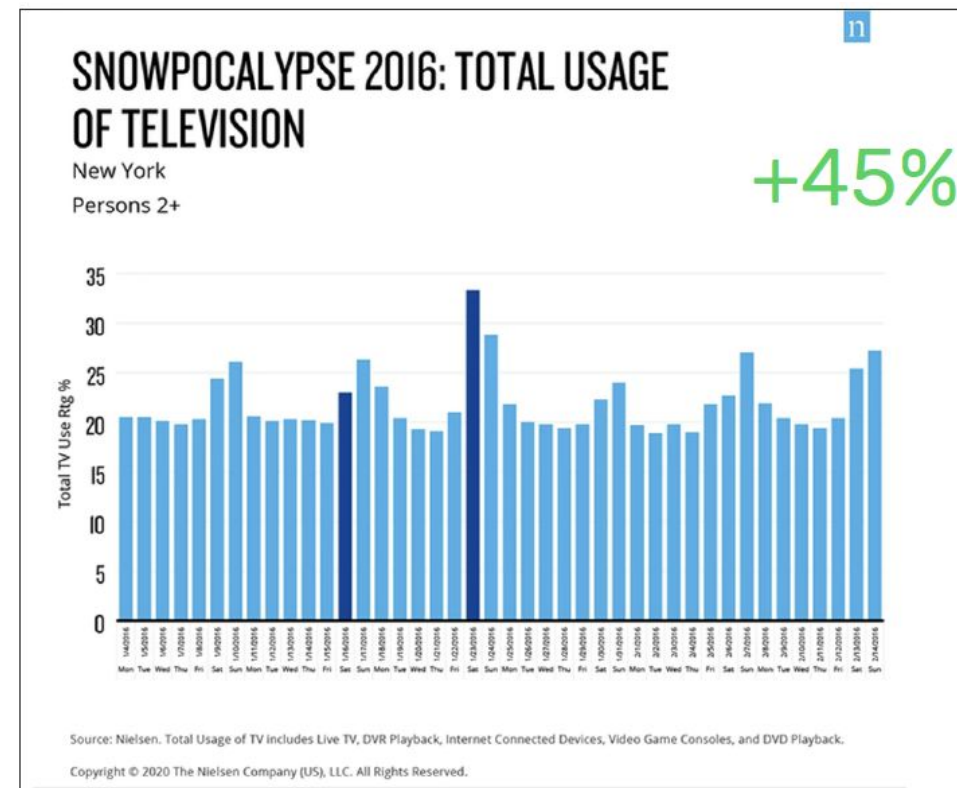
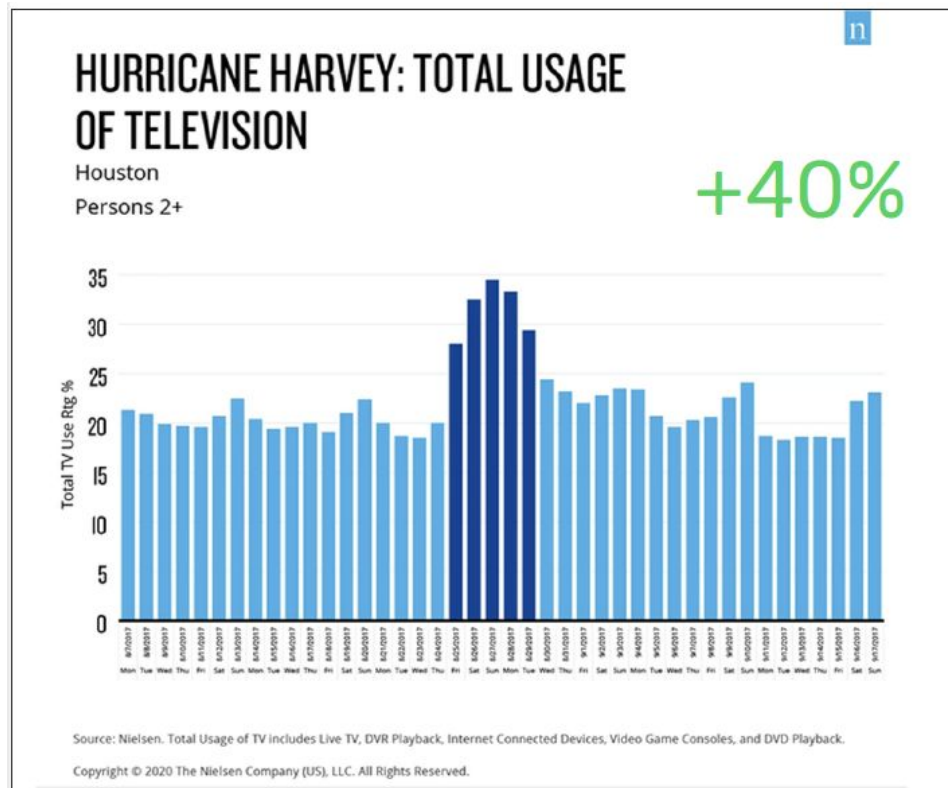
[Source. Media Consumption during the Coronavirus Pandemic. Comscore](#)

Radio listenership is trending up, as **27% of users report using it more since the outbreak**, and 31% are using it to keep informed about local cases.



Source: Daily COVID-19 Update: Concern + Media Consumption, Nuvooodoo

During two previous crises that kept people housebound, consumers watched **61% more streaming video content**. Predictions show that Coronavirus will have consumers follow a similar trajectory, **expecting streaming video content to rise by over 60%**.

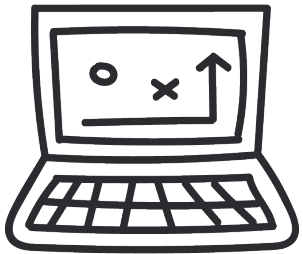


[Source: Self-Isolating Because of Coronavirus? You're Probably Watching TV, AdWeek](#)



Twitter has seen that COVID-19 related content is **shared every 45 milliseconds** and **#coronavirus** is **now the second most used hashtag of 2020**.

[Source: Brand communications in times of crisis, Twitter](#)



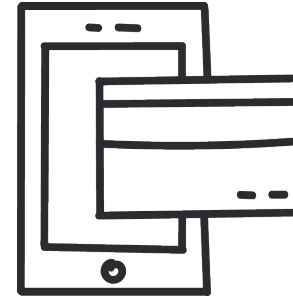
Education

Shift from offline to online



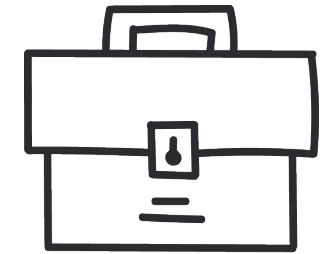
Service Delivery

Transformation from
IRL to virtual



E-Commerce

Continued growth, attracting
older generations

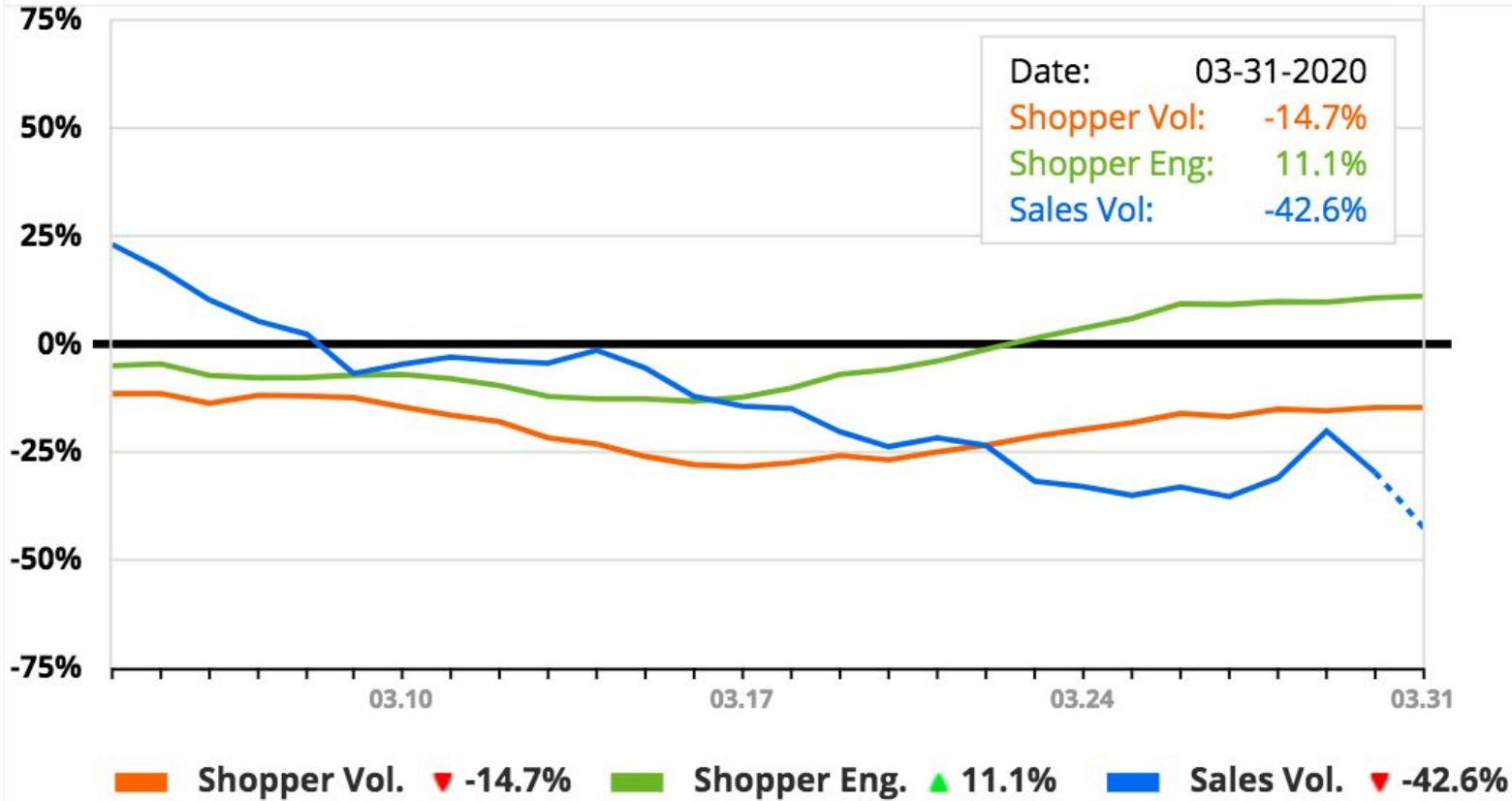


Traditional Businesses

Accelerated digital
transformation efforts

[Source: What do consumers expect from brands? Kantar](#)

AUTOMOTIVE MARKET IMPACT

vs February 2020

Immediately we have seen a huge and expected drop in sales volume

but an increase in shopper engagement

even with lower shopper volume. Shoppers are now sitting at home and spending more time looking at the cars they plan to buy in the future.

Across the board, sales volumes are down while
pickups are enjoying higher shopper volumes and engagement.

National : All Brands

Body Style	Shopper Volume week over week change	Shopper Engagement week over week change	Sales Volume week over week change
PICKUP	▲ +32.85%	▲ +34.52%	▼ -4.58%
VAN	▼ -2.46%	▲ +0.85%	▼ -15.76%
COUPE	▲ +14.73%	▲ +21.86%	▼ -16.99%
SEDAN	▼ -7.03%	▲ +0.73%	▼ -25.77%
HATCHBACK	▼ -6.59%	▼ -4.44%	▼ -26.25%
CONVERTIBLE	▲ +4.41%	▲ +10.73%	▼ -27.77%
CUV	▼ -3.72%	▼ -0.64%	▼ -27.89%
SUV	▲ +7.03%	▲ +12.2%	▼ -29.39%
WAGON	▼ -4.79%	▲ +1.17%	▼ -35.33%

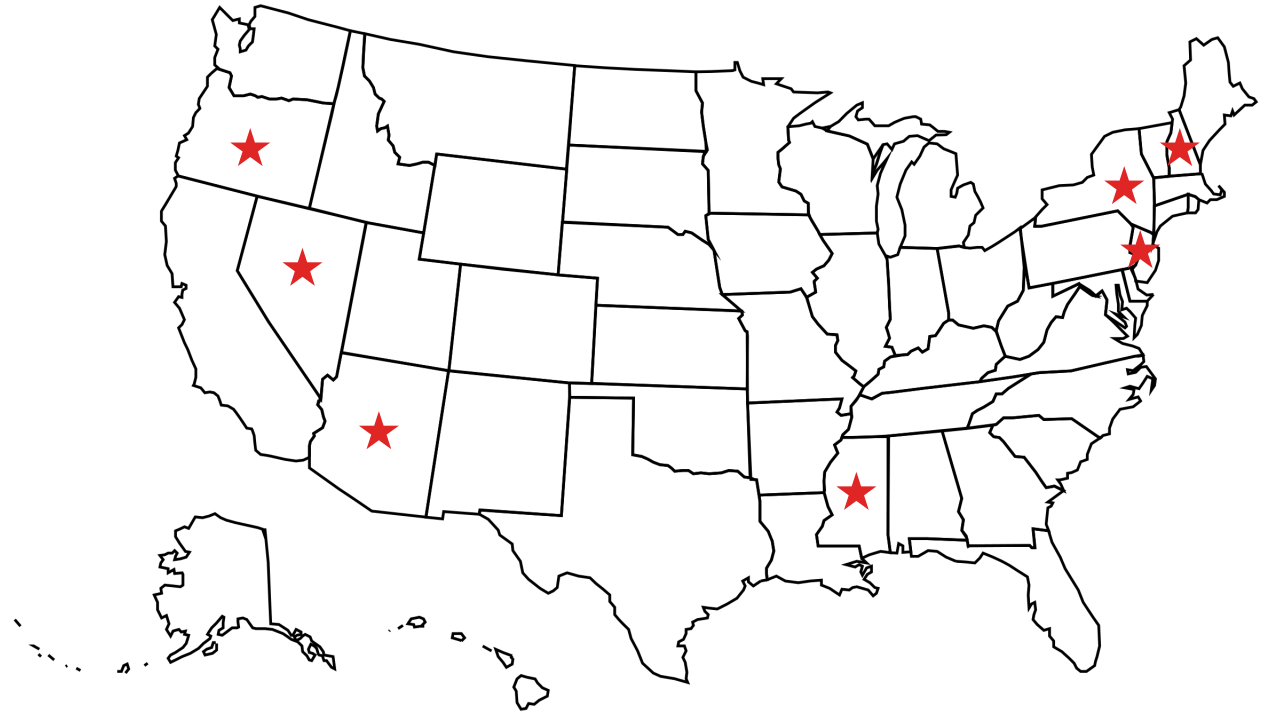
National : All Brands

Cond.	Make	Model	Shopper Volume week over week change	Sales Volume week over week change
New	RAM	1500	▲ +57.15%	▲ +0.0%
New	FORD	F-150	▲ +76.43%	▲ +30.14%
Used	FORD	F-150	▲ +3.23%	▼ -15.58%
New	CHEVROLET	SILVERADO	▲ +38.48%	▲ +8.01%
New	JEEP	WRANGLER	▲ +23.69%	▼ -35.37%
Used	RAM	1500	▲ +0.98%	▼ -42.75%
New	RAM	2500	▲ +46.07%	▼ -2.1%
New	JEEP	GRAND CHEROKEE	▲ +30.53%	▼ -40.33%
New	FORD	EXPLORER	▲ +42.23%	▼ -24.01%
Used	CHEVROLET	SILVERADO	▲ +0.67%	▼ -32.71%

States issuing nonessential business closures, including automotive sales:

Alaska	Massachusetts
California	Michigan
Colorado	Minnesota
Connecticut	Montana
Delaware	New Mexico
Florida	North Carolina
Georgia	Ohio
Hawaii	Oklahoma
Idaho	Pennsylvania
Illinois	Rhode Island
Indiana	Texas
Kansas	Washington
Kentucky	West Virginia
Louisiana	Wisconsin
Maine	Vermont
Maryland	Virginia

★ approved for automotive sales



[Source: ABC News States With Statewide Nonessential Business Closures](#)

[Source: Automotive News COVID-19 Headlines](#)

OEM IMPACT

1 MILLION+

people employed in automobile parts
and manufacturing in the U.S.

1.3 MILLION

people work for auto dealerships
in the U.S.



UAW ✓
@UAW

We spent hours tonight in talks with the leadership of the Big 3, demanding that they do the right thing for our members. The companies have agreed to new measures that will increase adherence to CDC recommendations on social distancing in the workplace.



Follow-Up on Big 3 Discussions | UAW

As you know, the UAW has strongly requested that the Big 3 automakers cease production for ...

uaw.org

The United Auto Workers union called on the three major U.S. manufacturers to shut their factory doors for two full weeks.

[Source: The New York Times](#)

GENERAL MOTORS

**U.S. Manufacturing Suspension:**

Through 3/30, no official date for restart.

Plants making ventilators.

Consumer Aid:

Providing 0% interest on 84-month loans and 120-day deferred payments on new-vehicle purchases for select customers.

Messaging:

FORD MOTOR COMPANY

**U.S. Manufacturing Suspension:**

Through 4/14, no official date for restart.

Michigan plant making respirators.

Consumer Aid:

The Ford Motor Credit Co. allows for up to 6 months of payment relief.

General Aid:

The Ford Fund is donating \$500,000 to nonprofit groups and food delivery.



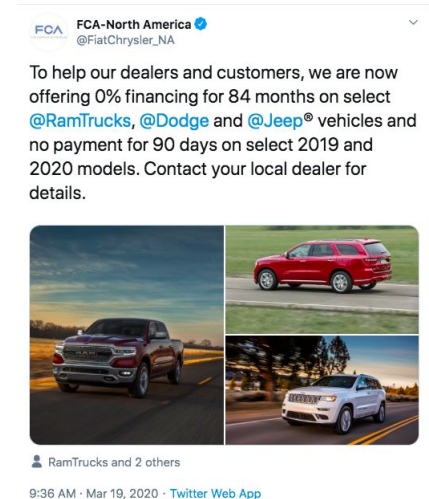
FIAT CHRYSLER AUTOMOTIVES

**U.S. Manufacturing Suspension:**

Through 4/14

Consumer Aid:

0.9% financing for 84 months and no payment for 90 days on select models.

Messaging:

HONDA



U.S. Manufacturing Suspension:
Through 4/7

Consumer Aid:

90-Day Deferred Payment on new vehicle sales financed by Honda Financial Services for qualified customers. \$1,000 cash toward new models.

HONDA

A message to our customers about COVID-19

The COVID-19 pandemic is impacting the lives of our customers, communities and neighbors. Beyond the most important need to stay healthy, we know that many are also experiencing financial stresses.

Honda is here to help.

If you're a Honda Financial Services Account Holder:

- **Available Hardship Help:** Payment extensions and deferrals, as well as late fee waivers are available. For more information, please visit [HondaFinancialServices.com](https://hondafinancialservices.com). We appreciate your patience as we are experiencing high call volumes.

If you need to purchase a new or used vehicle right now, we can help make it easier:

- **90 Days to First Payment Program:** 90-Day Deferred Payment on new vehicle sales financed by Honda Financial Services for qualified customers/1
- **Loyalty Purchase Assistance Cash:** \$1,000 toward the purchase or lease of a new Honda model (certain exclusions apply)
- **Certified Pre-owned Vehicle Special APRs:**
 - Honda: Civic, Accord and CR-V from April 17, 2020 to June 1, 2020

If your vehicle requires repair or maintenance, in so far as your state and local governments have recognized transportation as an essential need, your local Honda dealer service operation should be open and able to help you.

We hope you'll join us in protecting the health of our families and communities by following the advice of the Centers for Disease Control and your local health authorities.

Together we will make it through these challenging times.

NISSAN



U.S. Manufacturing Suspension:
Through early April

Dealer Aid:

Lowering floorplan rates and offering assistance programs for mortgages and loans.

Consumer Aid:

Offering 90-day deferred payments for select customers.



Nissan
@NissanUSA

In these uncertain times, we're here to help current and future Nissan owners financing through NMAC in the US impacted by COVID-19 with payment options and special offers. Applies to select models. Call 1-800-456-6622 or click the link below for details.

spr.ly/60141sNF4

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HYUNDAI



U.S. Manufacturing Suspension:
Through 4/13

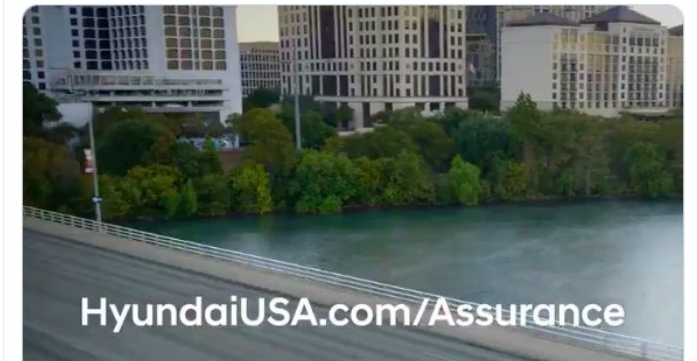
Consumer Aid:

Deferring payments on select models for 90 days. Assurance Job Loss Protection will make up 6 months of payments for customers who buy in the next 7 weeks.



Hyundai USA
@Hyundai

We want to help make things better and help you focus on what matters most. So in response to recent world events, we're launching a payment deferral program for current and new Hyundai owners called Hyundai Assurance. Learn more: hyundaius.co/2xDfR23



HyundaiUSA.com/Assurance

TOYOTA

**U.S. Manufacturing Suspension:**

Through 4/20. **Plants making face shields, masks, and ventilators.**

Consumer Aid:

Payment relief options from Toyota Financial Service. Deferred payments for 90 days on select vehicles.



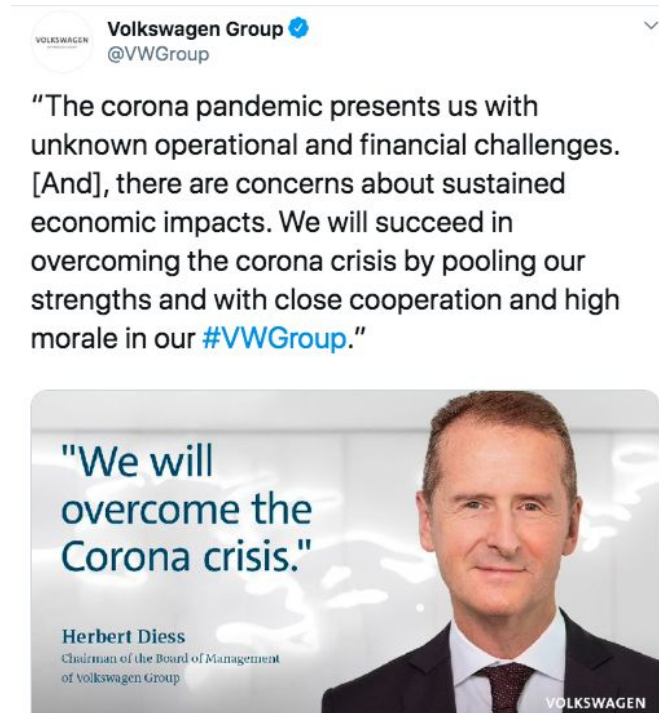
We are here for you. Stay up to date with how we're responding: toyota.us/2WxE1pg



VOLKSWAGEN

**U.S. Manufacturing Suspension:**

Through 4/6

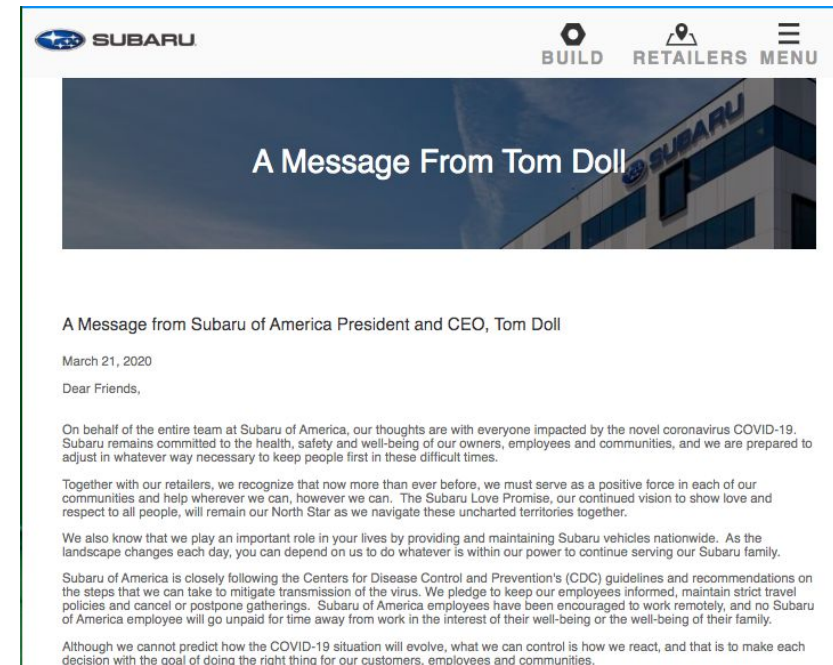
Messaging:

Gratifying figures 2019, major challenges 2020
www.volkswagenag.com
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SUBARU

**U.S. Manufacturing Suspension:**

Through 4/17

Messaging:

INDUSTRIES IMPACT

UBER

Changes in Service:

- Suspending “pool” rides
- Free Uber Eats delivery from local businesses

Messaging:

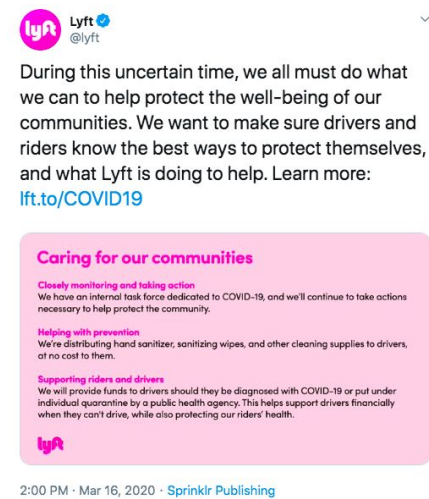


LYFT

Changes in Service:

- Suspending shared rides
- Offering compensation to sick drivers

Messaging:



AMERICAN AIRLINES

Changes in Service:

- Waiving flight change fees through 4/30
- Changing flight schedules to eliminate unnecessary travel

Messaging:



We're waiving change fees for customers who have travel plans through April 30.

American Airlines

Coronavirus: Latest Information from American Airlines
American Airlines is in close contact with U.S. and international authorities, as well as public health officials, and continues to ...
news.aa.com

12:09 AM · Mar 10, 2020 · Sprout Social

DELTA

Changes in Service:

- Assisting with flight cancellations and waiving fees
- Addressing proper cleaning procedures

Messaging:



We understand you have questions. We are waiving change fees broadly, but above all, rest assured that the value of your ticket won't be lost if you need to make a change. Learn more about our simplified waivers when making changes to your upcoming flight.



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AMTRAK

Changes in Service:

- No change fees for cancellations
- Updates on suspended services
- Guides for cancelling reservations

Messaging:



Safety is our top priority. We are closely monitoring the coronavirus with the help of public health experts, and we are:

Offering no change fees on reservations made through 4/30/20

Maintaining a safe, clean environment

Learn more:



Coronavirus Update | Amtrak
amtrak.com

9:30 AM · Mar 11, 2020 · Salesforce - Social Studio

GOOGLE

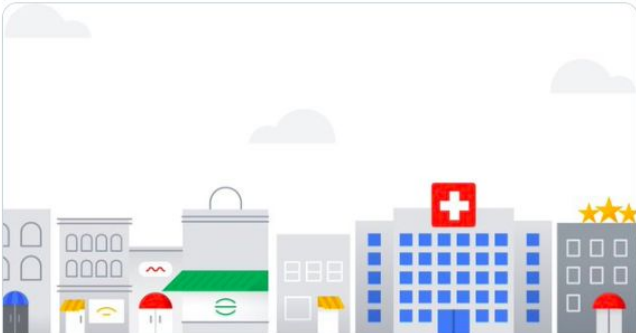
Changes in Service:

- Small and medium-sized businesses receiving \$340 million in Google Ad credits.
- \$250 million in ad grants for government organizations



Sundar Pichai
@sundarpichai

We're committing \$800M+ in new #COVID19 response efforts, incl \$340M in @GoogleAds credits for SMBs worldwide, \$250M in ad grants for @WHO & 100+ govt orgs globally, a \$200M investment fund for NGOs & banks to help small businesses access capital, and more



DEALERSOCKET

Changes in Service:

- Giving test drive technology free for 100 days
- Consumers can request test drives at any location

Messaging:



DealerSocket
@DealerSocket

COVID-19 is affecting all of us, especially DealerSocket customers on the front line. We're here to share their stories of response, communication, and adaptation. You can read their stories here: lnkd.in/gPw65Sg

#weareautomotive



Inside the Dealership: Honda of Cleveland | DealerSocket
Honda of Cleveland is coming off a 20-unit weekend with hope and a plan to keep leads flowing and the service drive humming during these uncertain time...

DIGITAL AIR STRIKE

Changes in Service:

- Retailing platform can conduct sales and vehicle servicing through video and virtual messaging
- Free for 30 days

Messaging:



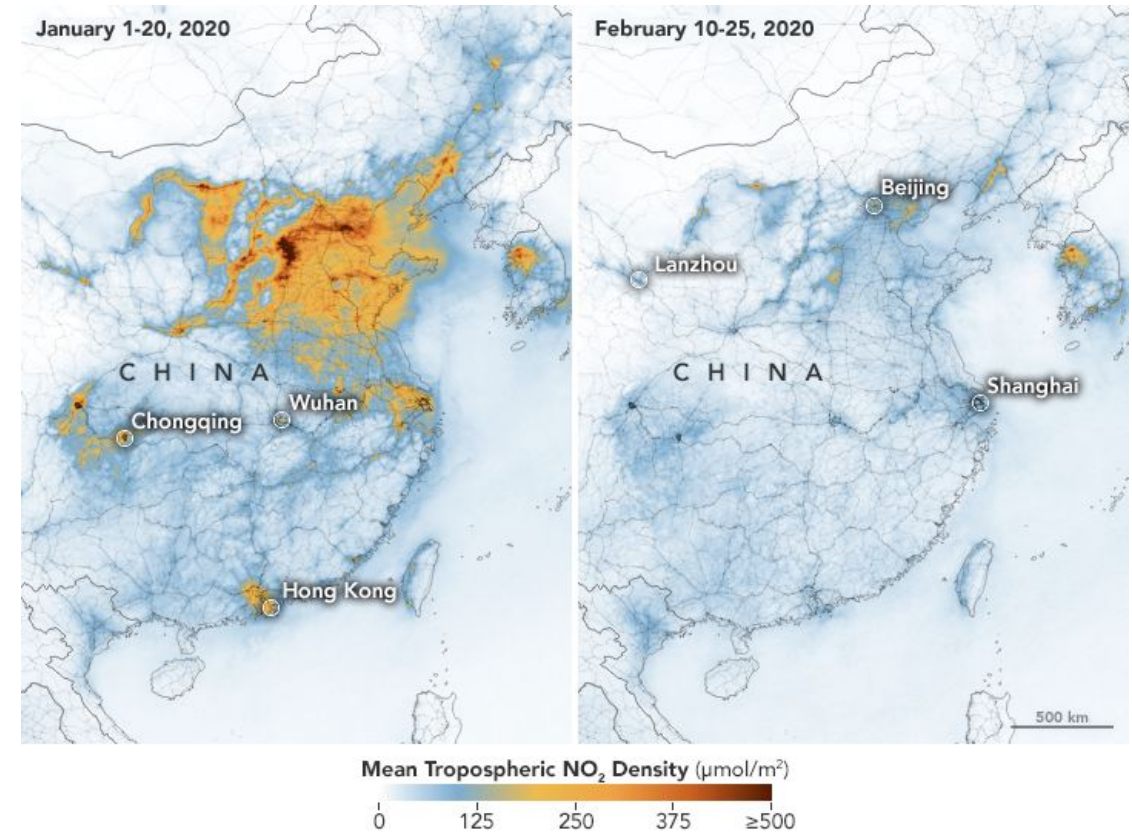
Digital Air Strike
@DigitalAirStrk

Digital Air Strike is here to help dealers thrive during the Covid-19 Pandemic. Join us for FREE webinars this week to learn top tips to use video, AI, and social media to communicate with customers and allow them to do more online! Reserve your spot 📧 bit.ly/3d6Ydno

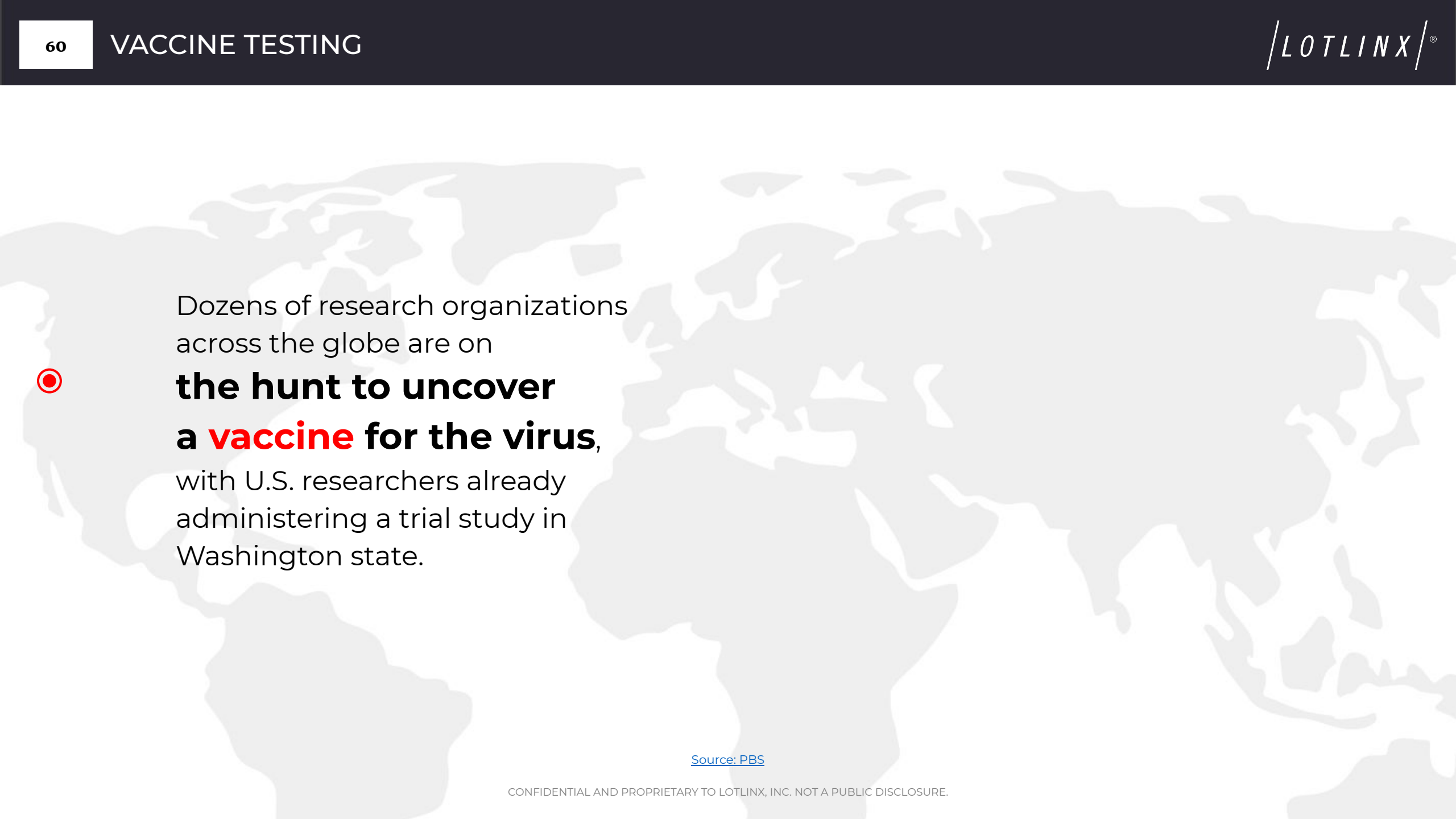


POSITIVE IMPACT

Social distancing in areas like China and Italy has resulted in **decreased traffic and industrial business pollution** and reduced the amount of nitrogen dioxide emissions in the air.



[Source: Earth Observatory](#)



Dozens of research organizations
across the globe are on

**the hunt to uncover
a vaccine for the virus,**

with U.S. researchers already
administering a trial study in
Washington state.

[Source: PBS](#)

1.

DIGITAL RETAILING

As trends continue to shift toward digital, it is more important than ever to be advertising online.

2.

HOME DELIVERY & ONLINE ORDERS

Now is the time to expand services to appeal to online-focused consumers.

3.

INVENTORY DRIVEN MARKETING

The sales approach is shifting toward targeting individual consumers. To do this, advertising must focus on your must-sell inventory as opposed to general messaging.

4.

UTILIZING DATA

Dealers need to continue to stay informed of fluctuating market data to make informed marketing decisions.



Drawing attention to expanded consumer services can be as easy as adding badges to your digital advertisements.

YOUR IMPACT

“If a window of opportunity appears, don't pull down the shade.”

- Tom Peters