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The Next Generation of Automotive Websites

Setting the bar for automotive retail websites to create a superior consumer shopping experience.

Over 45% of the web traffic to franchise dealership websites in the United States¹ originates from mobile devices; tablets and smartphones. This should not come as a surprise as mobile traffic has been increasing each year for most eCommerce websites in the United States. Despite this trend, companies selling website platforms to automotive retailers have been slow to respond with technologies that provide a “wow” experience for mobile shoppers.

2014 was the year of the “responsive” website; a term that implies that a dealer’s website content will display properly on all Internet enabled devices. In this report we will address the current shortcomings of the website technology offered to dealers, which may come as a surprise to some readers.

We will also discuss what consumers should be able to find on a dealer’s website. Consumers do not care about the technology that creates website pages. Consumers want a fast, relevant, and simple shopping experience. In the future, we will look back at this period in the automotive industry as Responsive 1.0.

Over 70% of franchise dealers in the United States that PCG surveyed stated that they were pleased with how their website functioned on a smartphone². With such high satisfaction rates, what would the second generation of responsive websites have to offer to interest auto dealers?

To answer that question, PCG Research surveyed hundreds of franchise dealers to see what website features are important for their business. We have included their responses in order to start a larger conversation within the automotive community, which will set the bar for responsive 2.0 platforms.

Our research also revealed that auto dealers need guidance on which website Key Performance Indicators (KPI) are aligned with customer satisfaction and which point to increased sales opportunities. It is within this context that website providers need to innovate and educate auto dealers that they are in the eCommerce business and will soon be completing sales transactions online.

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Forward

PCG has been evaluating and benchmarking automotive website platforms for over six years. In 2009, we embarked on a project to recognize the best website for automotive dealers based on their compliance and rankings in Google search results. The Automotive Search Marketing Awards (ASMA) set the industry on notice and a new award was created based on technical research — not based on how much a company advertised in trade publications.

Since those humble beginnings, the award process expanded to what is now the Automotive Website Awards (AWA). PCG is uniquely positioned in the automotive industry to evaluate the website needs of automotive dealers and the future trends that will benefit dealers the most. In this context, we are pleased to provide additional research on responsive websites and the new standards that future website platforms should be measured against.

Over the past six years we have identified a number of top performing websites which consisted of products produced by established companies as well as new startups. While past recognition is important to show that specific website platforms have been consistent in their technical leadership and ability to execute, dealers are primarily interested in how a website development company will continue to stay competitive in the future.

As you will learn, dealers want to be part of a website technology partnership that will insure that they stay ahead of the curve, and not fall behind. Dealers expect strong customer support. They want to be forewarned as new technologies emerge that can give their dealership a competitive edge. Dealers also expect website technology to work without interruption; their inventory needs to be online 24x7.

In the last 18 months, dealers have been bombarded with messages about the need to serve mobile shoppers. Even Google has recently issued warnings about search penalties for websites that are not “mobile-friendly.” While most major website platforms used by auto dealers are now mobile-friendly, the bar must be raised again; this time with the consumer experience in mind.

Over 600 automotive professionals were recently surveyed for the 2015 PCG Automotive Website Survey, which will be published in September 2015. We have included some of the data from the survey in this report. The data highlights how dealers feel about their current website providers.

Consolidation in the automotive service industry is underway. In the past year, a number of website companies have been purchased by larger companies seeking to build a more robust Digital Marketing Platform (DMP) for dealers. Not all dealers are pleased about this trend. It is causing disruption of service as well as fostering fears that customer service is bound to get worse.



Executive Summary

Dealers who are researching the latest features and innovations in automotive website platforms will be well served by reading this report. Based on our research and knowledge of the website marketplace, we have come to these conclusions:

- Despite more dealers switching to responsive/adaptive websites, the broader dealer community has been slow to embrace a full commitment to deliver an optimized shopping experience for consumers using a smartphone.
- Content delivery across desktop and mobile devices is inconsistent. Dealers are assuming consistency and/or are not aware how to inspect their website for content consistency.
- Conversion tracking and attribution are still elusive metrics for many automotive dealers especially in regards to finance and fixed operations marketing investments.
- As digital retailing software matures, allowing consumers to complete most of their vehicle purchase steps online, website companies must work to create software solutions to make the transactions seamless.
- Third-party website plugins are masking true visitor conversion metrics in Google Analytics. The auto industry must collaborate to define consistent metrics and actions that define conversion for auto dealers. This includes allowing Google Tag Manager to be installed on all web platforms.
- Website standards, such as those recommended by www.schema.org, are not taken seriously by some website development companies. This shows a disconnect with broader eCommerce development standards and best practices.
- As Google and Bing claim to reward websites based on their mobile speed and content formatting, the current automotive platforms differ greatly on their approach to mobile optimization.
- Website platforms seeking to deliver a robust set of features must create a seamless, intuitive management console. While some platforms have accomplished this, others have cobbled together many third-party tools that make management and reporting challenging.

It is critical that automotive dealers understand how to effectively evaluate their website platform choices. As the automotive industry moves closer to a full eCommerce experience, this research report will be invaluable for setting requirements for dealer website management tools and standards for improving the consumer shopping experience. There is no perfect website platform; the key is to find the balance of features and support that meet the needs of the dealership.

Dealers looking for a broader discussion of automotive website technology would be well served to purchase the [AWA Research report](#). The 330-page report, available in full color, reviews many of the top performing website, CRM, and technology platforms used by automotive dealers in the US, Mexico, Canada, and the EU. The book is available online on Amazon and the Apple iBook store.

A Transformation in Retail Automotive Sales

Over 20 years ago, auto dealers were told that they needed to be on the “Internet Highway” since consumers would be buying cars without the use of traditional marketing and sales channels. Dealers were told that they needed a robust virtual showroom to sell more vehicles. The hype was obviously premature.

Around the globe, consumers visit automotive retail showrooms to see in-stock vehicles, inquire about models/configurations, obtain vehicle pricing, apply for financing, and have their existing vehicle’s trade-in value established. The auto dealer’s website **finally** has the ability to become a virtual showroom, which could not be said just two years ago.

In the US, all of the listed objectives of a showroom visit are now offered online. In 2014, Dealer e-Process introduced CreditMiner, which allows a consumer to be pre-approved for financing in two seconds without having to provide their social security number or date of birth (DOB). Dealertrack Technologies has now demonstrated successful retail operations that have eliminated much of the traditional F&I office process by bringing decision-making to the website and showroom floor via iPad enabled technology.

Auto dealers know that they are behind in fully satisfying online auto shoppers. Dealers are upgrading their virtual showroom to responsive/adaptive website technology. Expectations for responsive or adaptive websites are very high because of the hype around mobile traffic. Some dealers who have inspected their new multi-screen compatible websites have not been pleased. The research in this report will show that:

Responsive websites are not created equally. The ideal virtual showroom experience is a marriage between personalized advertising, website content, and innovative conversion tracking.

In this report we will discuss the importance of having a mobile-friendly, eCommerce strategy in place to address the needs of consumers who are shopping for a new/used vehicle or interested in servicing their existing vehicle. We will also discuss the need for a personalized engagement experience that includes the seamless integration of manufacturer incentives with the dealership’s inventory marketing goals.

We will explore the benefits that native software technology can have on the consumer shopping experience. Together, we will look into how dealers can track the website behaviors and actions that consumers take when they connect with a dealership’s marketing strategy.

Dealers who are seeking to understand how to improve the measurement and ROI of their marketing investments are encouraged to read this report carefully. The current automotive retail transformation has come with a new set of vocabulary, acronyms, and promises. This report will help you remove the rose colored glasses and prepare you for when you shop for a new website platform. This is a very exciting time to be in the automotive retail business.

Defining Mobile Friendly

Much has been discussed and written about what Google considers a “mobile-friendly” website. Website developers and dealers are paying attention to Google since they define the rules for search results on Google.com.

Google has publically discussed the reasons behind their mobile-friendly algorithm update, commonly referred to as “Mobilegeddon⁴”, as well as the Google Insights Tool to measure website load times.

Once dealers understand how Google defines the term “mobile-friendly,” the conversation they have with their website vendors should quickly turn to what consumers want in a mobile automotive retail website experience and not what the dealer wants!

Research conducted by eMarketer.com in 2014 showed that consumers spend significantly less time researching autos on a smartphone when compared to other industries. Does that data indicate that the deep research associated with the consumer’s shopping process is not ideal for a mobile device?

It is our belief that the consumer’s desire to shop for autos using their mobile devices will increase, but current outdated website platform technologies have frustrated consumers who are doing more research on their smartphones. Can website platforms make deep research feasible on a smartphone?

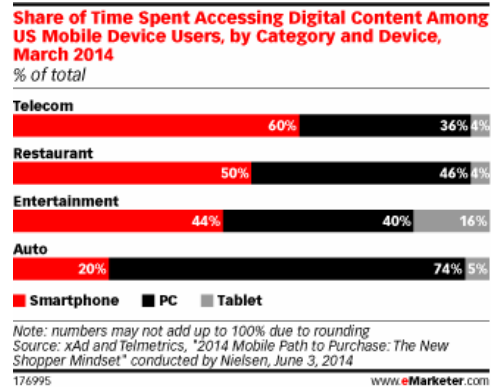
As website providers embrace multi-screen technology, which presents appropriately sized page designs for mobile, tablet, and desktop devices, then smartphone shopping time will increase.

It is clear from eMarketer.com research that until recently, the automotive industry has lagged behind their peers in accommodating mobile auto shoppers. It took the automotive industry until 2014 to deliver a multi-screen compatible website platform to the majority of franchise dealers in the United States.

It is our hope that automotive dealers and marketing professionals reading this report will focus on creating the best consumer experience first and then focus on satisfying the fickle Google search engine. Dealers should not be satisfied with the fact that their website is multi-screen compatible if they have never inspected the pages and shopping process their website platform has delivered.

Mobile consumers are generally impatient. If your website pages load slowly or if they are difficult to navigate, they will quickly move to another local dealership website.

The focus of automotive website developers and franchise dealers must shift away from technology that serves only the dealer to focus on software solutions that satisfy the consumer. Website platforms with seamless integrations into CRM, vehicle marketing pricing, financial institutions, and service scheduling software have the greatest opportunity to pull away from a crowded marketplace of responsive websites.



Responsive vs. Adaptive Websites

The software techniques in which companies create a mobile-friendly website are often categorized as either responsive or adaptive. In recent months, a third type of design has entered the marketplace called Responsive Server Side (RESS) design. Let’s review the differences in these three strategies:

Adaptive Web Design (AWD) – The website uses the server or “server side” to decide what components, images, assets, and content to send to a specific device. This model uses different versions of HTML and sometimes different URL structures. For example, consumers may be taken to web address like <http://m.dealerwesbite.com> to define the mobile version of a website.

Responsive Web Design (RWD) – The website is designed to work on all device screen sizes by “responding” or stacking the components, images, assets and content using media queries to make adjustments to the layout on behalf of the user – “client side”

Responsive Web Design with Server Side Components (RESS) – This approach combines AWD “server side” and RWD “client side” elements to create what is known as **RESS**⁵. Websites use the same “responding” functionality as (RWD) while using server side components (AWD) to make decisions on what will and will not be sent to the user’s device.

Dealer e-Process first introduced their adaptive website technology to US auto dealers in 2009. The first major automotive website platform to introduce a responsive website in production was Dominion Dealer Solutions in 2012. Some of the largest automotive website providers, by volume, came to market with multi-screen website technology much later than US auto dealers would have liked.

Release Dates For Adaptive or Responsive Website Platforms							
Website Platform	2009	2010	2011	2012	2013	2014	2015
CDK Global						Black	
Dealer e-Process	Black						Green
Dealer.com					Black		
DealerFire					Red		
DealerInspire				Red			
DealerOn					Red		
Dominion Dealer Solutions				Red			
Naked Lime						Black	
Search Optics						Red	
VinSolutions							Red

Red=Responsive

Black=Adaptive

Green=RESS

Prior to having a true multi-screen compatible platform, most website companies offered franchise auto dealers separate desktop and mobile websites. When dealers had two separate websites (mobile and desktop), custom content (additional website pages) on the dealer's desktop website was not transferred automatically to their mobile website.

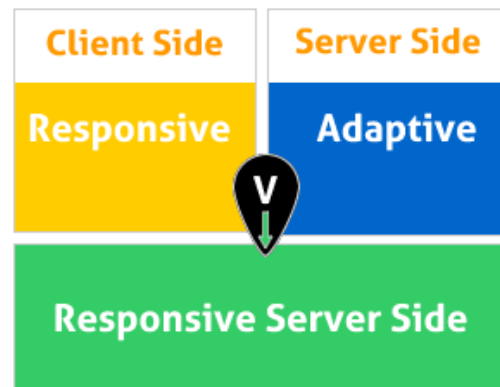
The problem of maintaining two different websites was not unique to the automotive industry. The inconsistency of website data was one of the main reasons why Google has encouraged businesses to create a single, mobile-friendly website that has the same content presented regardless of device type.

Today, automotive dealers are well aware that their websites must look outstanding on tablets and smartphones. Ironically, just three years ago, it was extremely difficult for website vendors to get franchise dealers to invest in developing a mobile website.

What is the ideal solution?

RESS appears to be winning converts and has been called the second generation of responsive website design. The RESS approach minimizes the data that is being passed to the client side thus reducing page load times. This is an important consideration for today's mobile shopper.

If pages take too long to load, the consumer will quickly move to another auto dealer website. The Google PageSpeed Insights Tool is one way in which web developers and dealers can measure the performance of their website platform. The tool can be found on this link: <http://bit.ly/WebPageSpeed>



In fact, Google has recently announced that it will start to identify websites that have slow load times in their search engine results pages. The full scope of the penalties for slow mobile websites is still unclear.

Reporting on Google PageSpeed Insights Data

We have gone back and forth on whether to include a table that compares the performance of different website platforms based on the PageSpeed Insights data. We chose not to because the results of the tests would be unfairly impacted by a number of factors that include the dealer's choice of chat companies, pop-up coupons, third-party plugins, as well as the core website platform.

Since the industry is in a state of rapid change, we encourage dealers to narrow down their choices of website providers and then conduct their own usability and speed tests based on a configuration that best mimics their set of third-party vendor and software tools.

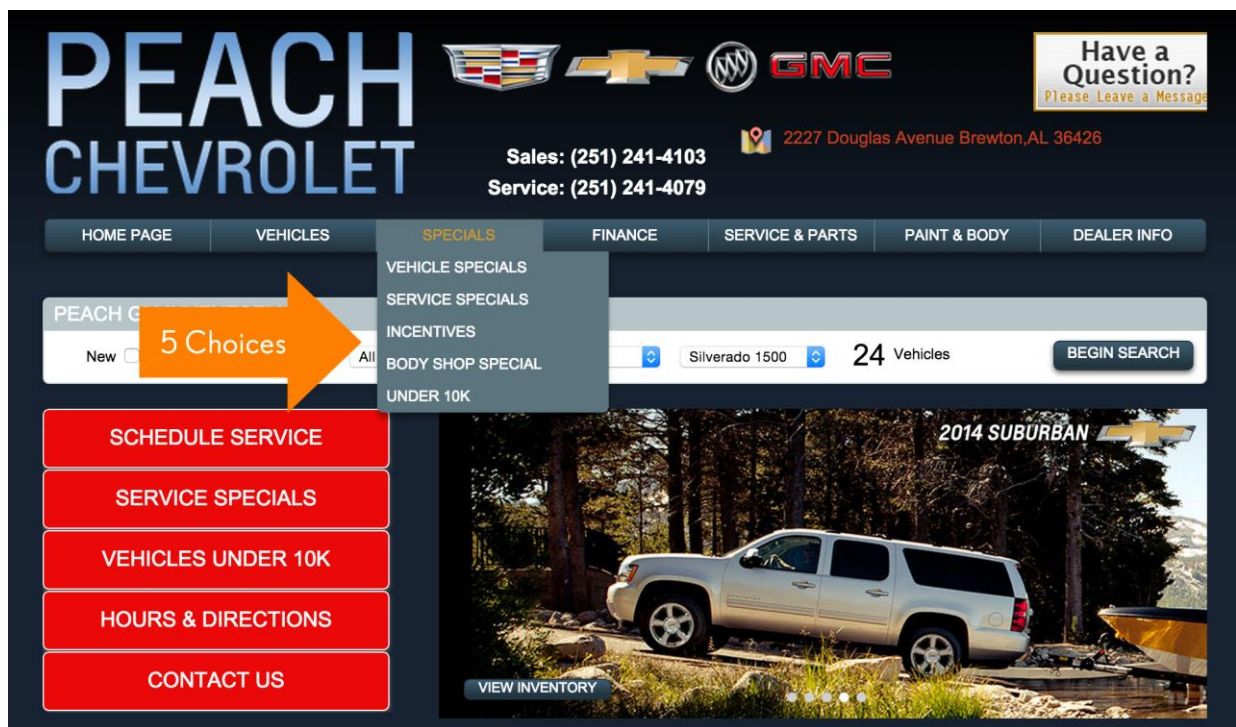
Shortcomings of Automotive Website Technology

When dealers shop for a multi-screen compatible website platform it is important to recognize that all platforms are not created equal. In this section we identify five shortcomings in website products offered for dealers that will impact the consumer experience, conversion, and/or sales attribution.

NAVIGATION AND MENUS

When a dealer purchases a website platform, the delivered website includes a base set of pages that are listed in the navigational menus.

In the example below, you will see that Peach Chevrolet has five choices under their Specials menu. The dealership also has a main navigational menu choice for “Paint & Body.” There are two sub-menus, under “Paint & Body”, on the desktop version of their website.



These menus were created by the dealership because they thought that they were relevant for local consumers who visited their website. It is clear that the dealer is investing to increase his fixed operations revenue by merchandising his website properly. Dealers who understand the need to add localized content specific to their dealership will add additional content pages to their website.

However, when a consumer visits the Peach Chevrolet website from an Apple iPhone 6, the website menus are completely different. If a consumer first visited this dealership website and learned about the services offered in their Body Shop, and then returned to the dealer's website on their smartphone, they would be unable to find any pages about the Body Shop.

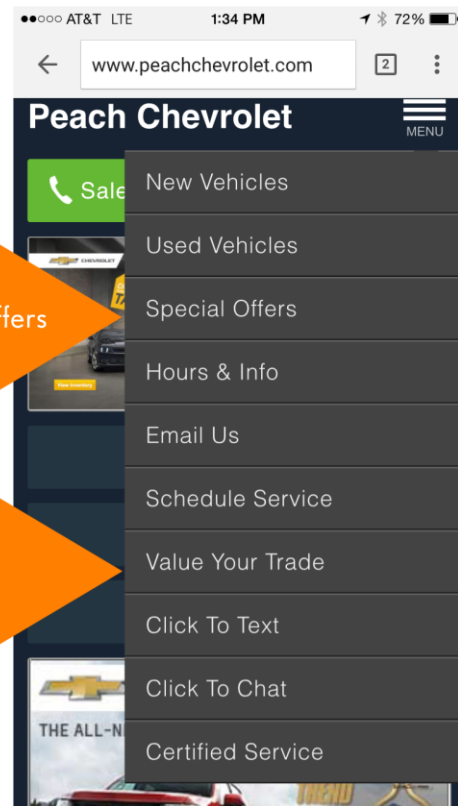
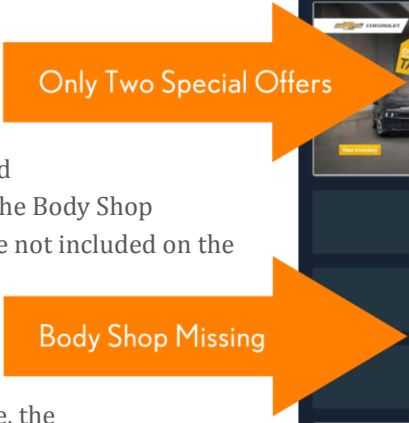
On the mobile presentation of Peach Chevrolet's website, if a consumer clicks on Special Offers, there are only two choices offered: Used Vehicle Specials and Service Specials. The Body Shop Specials and the Vehicles under 10K are not included on the menu system.

Even though the platform being used by Peach Chevrolet displays content appropriate to each device type, the platform is making content choices on behalf of the dealer and the consumer. This does not foster a consistent user experience.

Flexible Menus?

We spoke with CDK Global about this example and were told that the dealer has the choice of which pages show on the mobile version of their navigational menus. While we are pleased to know that this issue can be easily resolved, it is unclear if CDK Global customers know this. From our informal survey, CDK Global dealers assumed that all content would be automatically presented to a mobile shopper.

Until clear data is presented that specific menu choices can be eliminated on a mobile device, based on consumer click activity, it is our position that website vendors should not be judging the intent of mobile shoppers. We would prefer that a consistent shopping experience be presented, especially if core areas of the business are part of the website's main navigation.



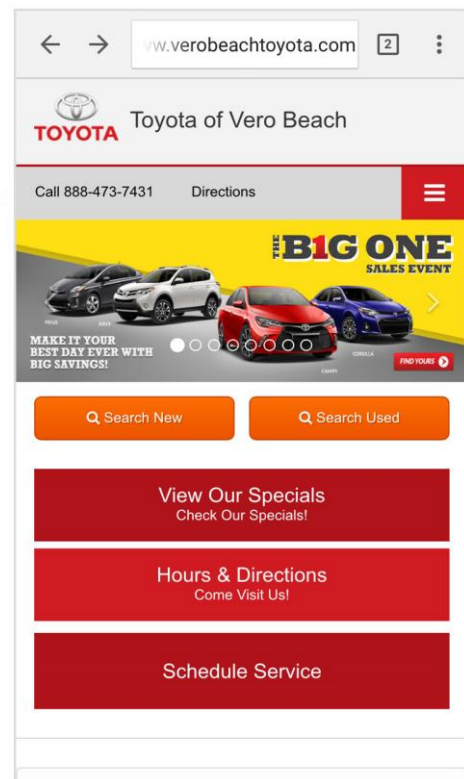
PHONE NUMBERS

Dealers often will display two or more phone numbers on their website. These numbers go directly to sales, service, parts, or finance. In the example below, Toyota of Vero Beach presents two phone numbers on every page of their website, when viewed on a desktop or tablet device.



However, when the same website is viewed on an Apple iPhone 6, there is **only one phone number displayed**. This may seem like an insignificant event, unless you are the Fixed Operations Manager who wants to track the ROI of their marketing investments to drive service customers to their website.

Mobile shoppers are seven times more likely to call a dealer than to submit a lead form. You would expect that the mobile website would display both phone numbers to correctly route the consumer to the best person to answer/service their needs.



This is a flaw that should not be overlooked, especially for dealer groups with advanced phone routing and/or multiple business units that depend on one website to drive consumer engagement.

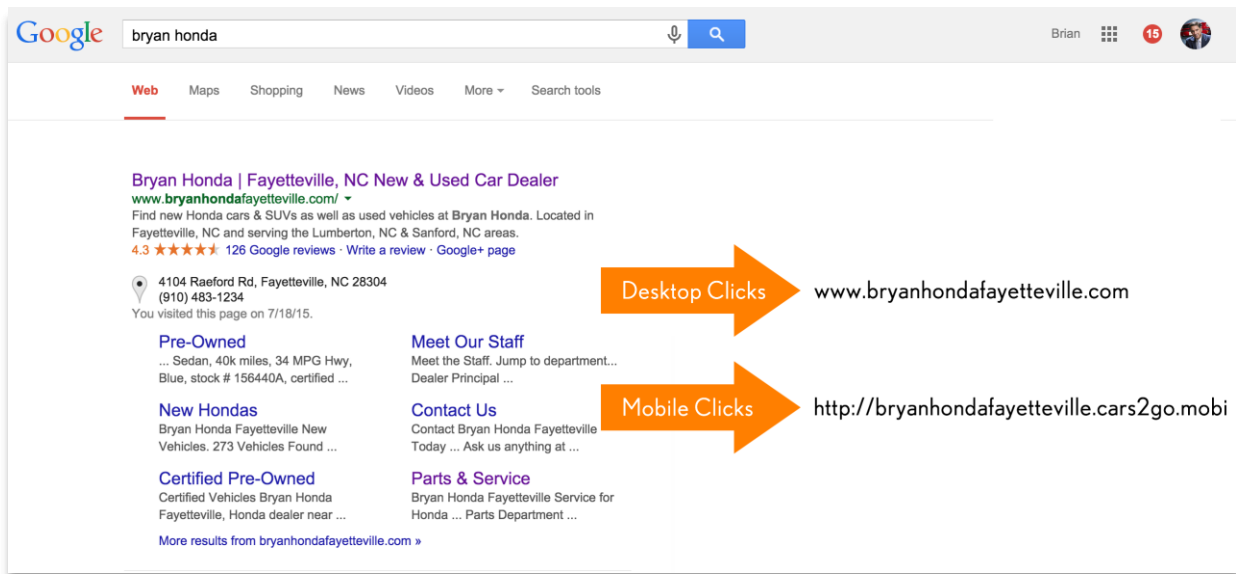
We spoke with DealerOn about this discovery on their website platform and were informed that their internal testing of their mobile design indicated that a single phone number is a better choice for consumers. We did not have the opportunity to review their research, which seems to contradict common sense, but look forward to doing so.

We were pleased to hear from DealerOn that their customers, who want to have both numbers show on their mobile optimized pages, can request that change from the DealerOn support team.

MULTIPLE URLS

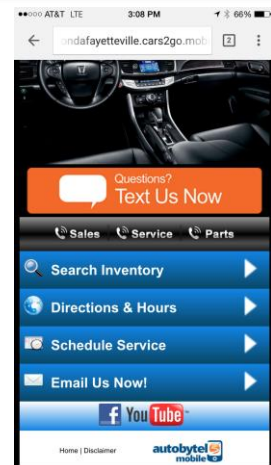
Despite the urgent need to provide consumers with a seamless multiscreen content delivery platform, auto dealers are still waiting for vendors to provide an upgrade to their website. It is still commonplace to see dealers operate with two separate websites; one for desktop and one for mobile shoppers.

In this example, when consumers search for Bryan Honda in Google they will be taken to a different website depending on which device they are using. The mobile shoppers are taken to a completely different domain than what Google considers the primary domain for the dealership.



Over 60% of the website content pages that are part of the desktop website experience are not included on the mobile website. The mobile website is basically an inventory search tool, a service scheduler, and an hours and directions page. All of the rich content on the primary desktop website is not presented to a mobile shopper.

With 30-60% of consumers reaching a dealership website via a smartphone, a dealer's investments in Search Engine Optimization (SEO) and content development are negated by having a separate stripped down mobile website. This type of execution is exactly what Google is preaching to end; consumer content should be made available regardless of which device a consumer is using at that moment.



While this VinSolutions website will eventually be upgraded to their new responsive platform, the delays in coming to market with an enterprise upgrade for their existing customers has been frustrating to their fans.

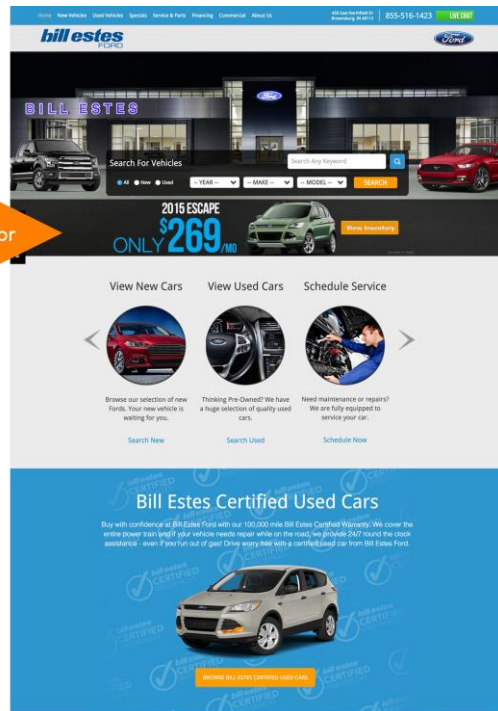
CONTENT DELIVERY

It should make sense that dealers deliver consistent navigation, content, and call to action messages across all consumer device types. A consistent consumer experience can allow marketing professionals to A/B test different designs and to compare desktop shopping behaviors to mobile shopping actions with more confidence.

However, if the website technology and user experience varies between desktop and smartphone, are dealers really able to conduct robust engagement studies?

In the example on the right, this dealer has an active banner rotator which displays their current offers on the desktop version of their website. The banners change every few seconds with a new vehicle offer and a payment per month to attract consumer interest.

Banner Rotator

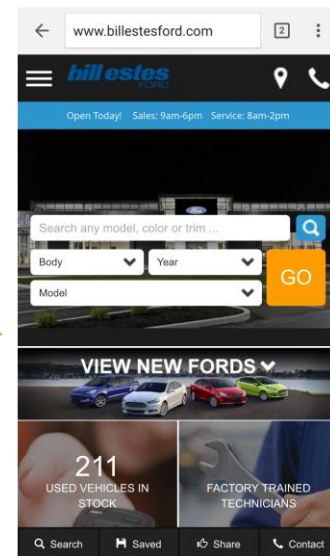


When the same website is viewed on an Apple iPhone 6, the banner rotator is omitted. What would seem to be an important element for integration with display advertising, retargeting, and home page customization is not available on a smartphone.

When we spoke with DealerInspire, they informed us that on a mobile device, banners are not a high engagement area of the home page, so they often omit the banner. We encourage DealerInspire to publish the data that supports their strategy. We look forward to reviewing the data and then commenting further.

Dealers need more control over the decisions being made on content delivery. Coordinating advertising investments and OEM compliance standards can be a challenge on some platforms. If a dealer is running a Google AdWords campaign with a \$269/month promotion of a 2016 Ford Escape, it would seem appropriate that the Escape banner would show on both the desktop and mobile device.

Banner Ads Missing



The auto industry needs an active discussion on what content is appropriate for shoppers that utilize multiple devices on their shopping journey.

CONVERSION BLIND SPOTS

Automotive website platforms have evolved over time to provide automotive dealers with greater insights into which marketing investment(s) triggered a consumer to call, chat, text, or submit a lead form for variable operations (vehicle sales). Unfortunately, dealers who are focused on increasing fixed operations (after sales) and finance revenue with online marketing investments have been unable to easily associate the marketing source of their leads.

The auto industry must work together to solve the "iframe blind spot."

The iframe blind spot is a result of how third-party service appointment forms (and many finance applications) are implemented on a dealership website. Third-party service appointment forms, like xTime shown below, are placed on a dealer's website using a web programming technique called iframe. An iframe allows a third-party website page to run inside another website page. In this example, xTime is running inside of BMW of Schererville's service appointment page.



What Customer Sees

What Google Analytics Sees

A consumer who visits a service appointment or finance application page on a dealer's website will not notice that the form is actually running on a different website. The iframe allows the third party form to seamlessly appear as part of the dealer's color scheme and layout, as shown above.

The activity inside the iframe is normally not visible to a dealership's website platform and their Google Analytics. So any data that is captured on the form is not connected to the website visit or which advertising source generated the click. Industry leaders must work together to solve this problem to create seamless integrations for service scheduling and finance applications.

INCOMPLETE SCHEMA.ORG MICRODATA

Over 10 million websites use the microdata tagging recommendations established by www.schema.org⁶. The Schema.org Community Group provides a forum for discussing all changes, additions and extensions to schema.org. In addition to providing a public setting for the day to day operation of the project, it serves as the mechanism for reviewing extensions and as a liaison point for all parties developing independent extensions to the schema.org core.

Why should websites use the microdata suggestions outlined by the website community? Here is an excerpt from their website:

Most webmasters are familiar with HTML tags on their pages. Usually, HTML tags tell the browser how to display the information included in the tag. For example, `<h1>Avatar</h1>` tells the browser to display the text string "Avatar" in a heading 1 format. However, the HTML tag doesn't give any information about what that text string means—"Avatar" could refer to the hugely successful 3D movie, or it could refer to a type of profile picture—and this can make it more difficult for search engines to intelligently display relevant content to a user.

Schema.org provides a collection of shared vocabularies webmasters can use to mark up their pages in ways that can be understood by the major search engines: Google, Microsoft, Yandex and Yahoo!

There are numerous microdata definitions that apply to automotive websites, yet only a few website companies have fully embraced microdata tags.

Only three of the seven website platforms listed in our comparison table have a strong implementation of the schema.org microdata tag; Dealer e-Process, DealerOn, and DealerFire.

Microdata tags can be used to define important parts of a dealership website page, that include:

- | | |
|--|---|
| <input type="checkbox"/> Dealership Name & Address | <input type="checkbox"/> Vehicle Availability (InStock/Order) |
| <input type="checkbox"/> Vehicle Year, Make, and Model | <input type="checkbox"/> Stock Number |
| <input type="checkbox"/> Vehicle Price | <input type="checkbox"/> Serial # (VIN#) |
| <input type="checkbox"/> Vehicle Condition (New/Used) | <input type="checkbox"/> Product Reviews |

By using microdata tags, dealership websites can be further optimized to appear stronger in search engine results. Microdata can also be used to tag breadcrumbs on navigational menus and product reviews by consumers. Website companies must be held accountable to stay current with eCommerce and search engine optimization standards embraced by the greater online community.

Dealers can test their website SRP and VDP pages for microdata by using the Google Structured Data Testing Tool which can be found here: <http://bit.ly/1NpQDkm>. If your pages fail this test, you could be running on an older version of your website platform software or your provider has not invested in microdata tagging.

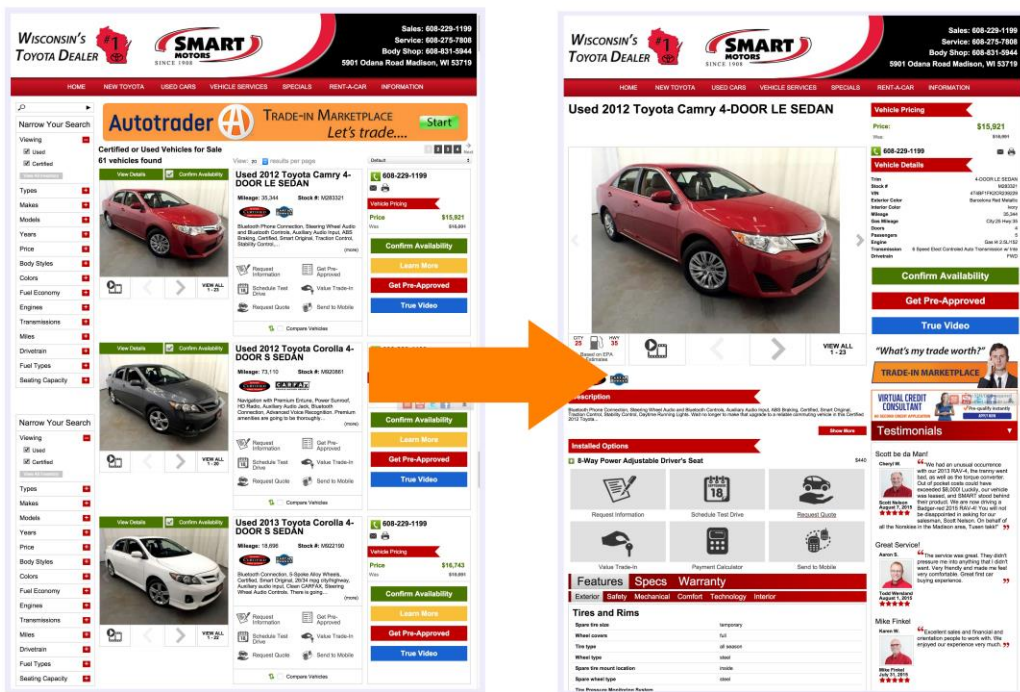
THE NEXT GENERATION OF AUTOMOTIVE WEBSITES



INCOMPLETE VEHICLE PERFORMANCE REPORTING

Most automotive franchise dealers do not think they are in the eCommerce business. However, consumers shop for a vehicle very similar to how they shop for other goods and services online. The only difference today is that vehicle purchases cannot be fully completed online. There is still the need for manual signing of documents that are associated with a vehicle delivery.

Most readers can relate to shopping online for consumer goods on websites like Amazon.com, BestBuy.com, or Macys.com. Most eCommerce websites allow a consumer to narrow their search for products in an attempt to get the shopper to visit a product details page. Careful analysis is done to inspect which products are being searched for, and which product pages have the highest conversion of page views to sales.



Search Results Page (SRP)

Vehicle Detail Page (VDP)

Automotive dealers also display their products online with similar search functionality. Search Result Pages (SRP) can show general interest in classes of vehicle that are offered for sale. Consumers who find a vehicle that matches their search requirements may click to the product page, which in the auto industry is called the Vehicle Detail Page (VDP). The example shown above from Dealer e-Process demonstrates a new trend to create more robust Search Results Pages (SRP) that do not require a click to a VDP.

What if data showed that a fully merchandised SRP generated more leads than a VDP?

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Dealers who understand that they are in the eCommerce business analyze which vehicles are getting the most activity, by inspecting SRP and VDP views by vehicle class, price, and/or style. Dealers who want to identify potential VIN merchandising problems will look at total SRP and VDP views per vehicle and how many calls, chats, texts, and lead forms are being triggered by these visits.

This type of analysis is critical for progressive dealers that are investing more of their marketing dollars to drive more shoppers to their websites.

Unfortunately many website platforms do not provide eCommerce insights to make it easy for dealers to identify those vehicles in stock that are having merchandising/traffic problems.

The next generation of automotive websites will integrate vehicle market pricing and vehicle activity to give dealers insights on how to optimize their inventory merchandising and advertising. In the report shown below from Dealer e-Process, a startling new trend is being investigated.

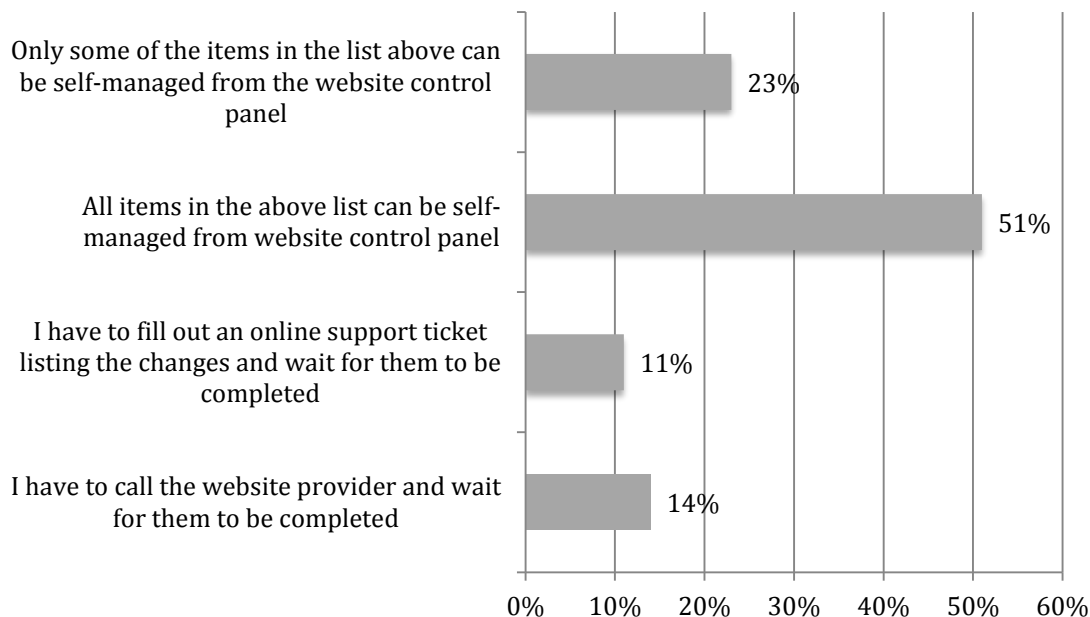
Since their platform's Search Results Pages (SRP) allow consumers to look at photos and engage in all call-to-action offers, they are seeing **that consumers will convert on an SRP even more than on a VDP**. This revelation is only being discovered since the company is committed to providing dealers with reports that would be expected by eCommerce companies. In the report below, real-time lead activity is shown for a dealer using the Dealer e-Process platform and you can see that SRP leads exceed VDP leads!

SRP	VDP	Other
155	102	18
Name : Kelley Wells Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 11:15 PM CST VDP +
Name : Fatai ijelu Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 9:42 PM CST SRP +
Name : Connie Rainey Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 8:05 PM CST SRP +
Name : Connie Rainey Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 8:01 PM CST SRP +
Name : Timothy Taylor Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 4:20 PM CST SRP +
Name : Timothy Taylor Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 4:18 PM CST VDP +
Name : Nancy Bruce Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 3:43 PM CST VDP +
Name : rolanda tate Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 2:10 PM CST SRP +
Name : Angie Temple Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 10:46 AM CST VDP +
Name : deshun sanders Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 9:48 AM CST VDP +
Name : Atari Powell Email : [redacted]	Lead Source : Get e-Price	Date : 7/22/2015 at 1:31 AM CST SRP +
Name : Geraldine Griffith Email : [redacted]	Lead Source : Get e-Price	Date : 7/21/2015 at 10:10 PM CST SRP +

SELF MANAGEMENT TOOLS

After reviewing automotive website platforms for the past six years, PCG is in a unique place to evaluate the features that make some website platforms stand out from their peers. Is there a perfect website platform for all dealers? No. With that said, we asked over 600 automotive managers and employees the following question:

When you need to add/change website content, change website menus, update specials, and/or advertising banners on the website, how would you describe the experience?



Most competent automotive website platforms have an open Content Management Software (CMS) backbone that allows dealers to add/change website pages without assistance from technical support. The best in class websites also allows dealers to easily integrate and update manufacturer rebates and special promotions on inventory listings.

Unfortunately, some dealers are still held back by their website platforms. Forty-nine percent of dealers surveyed said that they are required to call to technical support to make basic website changes.

The next generation of website platforms must increase the independent maintenance of dealership website pages to allow dealers to be more nimble when marketing opportunities arise.

Next Generation Website Checklist

The next generation of automotive websites must deliver a superior consumer experience that is consistent across all Internet enabled devices. This checklist can be used as a tool when dealers shop for their next website platform or when an upgrade is being considered.

Use this checklist to interview potential website companies. Be sure to request examples of current website customers so that you can test the presentation of data on desktop, tablet, and smartphone devices.

- Creates digital retailing tools to move consumers toward a self-directed purchase
- Integrates manufacturer incentives and rebates seamlessly
- Supports Google Tag Manager installations
- Offers intuitive web platform tools allowing for easy page creation and management
- Scales content and experiences to cater to the capabilities of each device
- Delivers a robust implementation of the schema.org markup language⁷
- Provides optimized vehicle photo galleries for each device
- Offers complete navigational menus across all device types
- Displays multiple phone numbers consistently on web pages across all device types
- Tracks consumer engagement on website pages including third-party plugins
- Integrates reporting for conversions on lead forms, chat, texting, and phone calls
- Offers "Google style" dynamic search bar with real-time feedback
- Offers robust tools for drag and drop page design on SRPs and VDPs
- Customizes consumer experience based on website and offsite data
- Integrates validated consumer reviews to build trust with shoppers

Dealers are advised to check their current website technology against this list. After checking your existing website platform, discuss any missing elements with your website provider to see if they plan to upgrade their platform in the near future.

We have also provided a comparison table of these features for eight website providers later in this report.

Recognizing Industry Leading Ideas

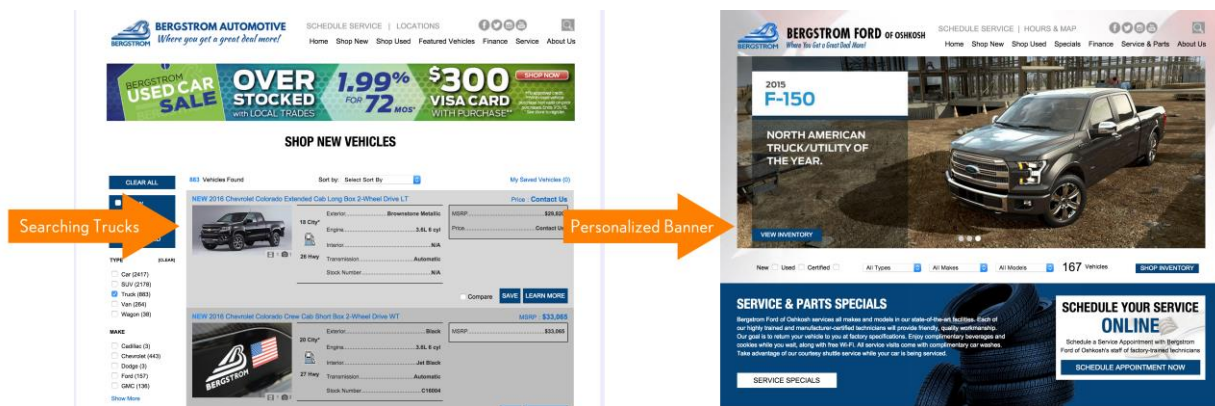
In this section, we highlight features that show how leading website companies are providing innovative ideas to automotive online marketing and consumer engagement. While no website platform is perfect, we recognize companies that continue to raise the bar for website innovation.

DEALER GROUP PERSONALIZATION

Dealer groups, who have many stores in a centralized area, have been at a disadvantage in the past because their websites did not optimize the consumer experience that cross-shopped their stores. CDK Global is innovating the online marketing tools for dealer groups by leveraging consumer shopping behavior across multiple websites.

Here is a scenario to consider:

A consumer visits Bergstrom Automotive's group website at www.bergstromauto.com and searches for trucks. The consumer first selects to view all trucks in stock and then clicks on a new Chevrolet Colorado truck listed on the Search Results Page (SRP). They view the Vehicle Detail Page (VDP) and then leave without contacting the dealership.



The following day the same consumer visits a Bergstrom Ford dealership website located at www.bergstromfordofneenah.com. The home page banner of the website displays a Ford F-150 truck with a link to the dealership's in-stock inventory. The truck is being displayed because of the consumer's initial interest in the Chevrolet Colorado on the group's main website.

In fact, if the consumer later visits one of the other Bergstrom websites that offer trucks, the home page will be customized. This feature creates a mini-advertising network within the dealer group's website properties to streamline the navigation and improve the customer experience.

CDK Global is also enhancing the personalization within the dealer’s network of websites with other data that is available to their content and advertising engine. Website personalization is available today from a small number of website companies. However, providing personalization and custom advertising options within a group of websites is an innovation that should be carefully watched as data sheds light on the value of this type of coordinated merchandising.

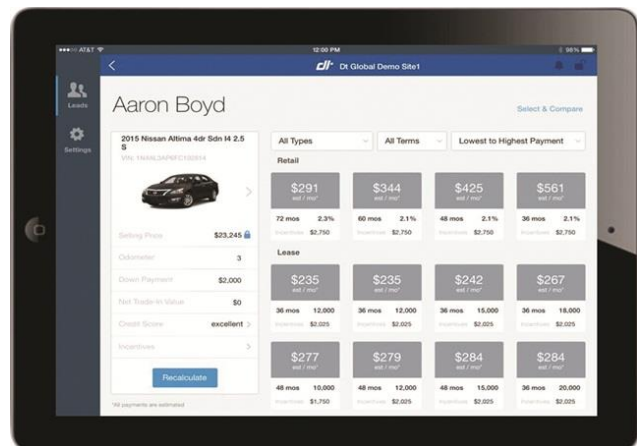
DIGITAL RETAILING TOOLS

Dealertrack Technologies is among the leading companies offering digital retailing tools that can be integrated into any website platform. Digital retailing software includes a unified set of consumer facing tools to allow vehicle trade-in, finance, lease payments, and loan approval without having to physically be present in the dealership.

Digital retailing software also includes tools to be used in the showroom to give consumers interactive control of the purchase process.

By giving consumers control of their choices, dealers can change the perception that purchasing a vehicle is a stressful process.

Some dealers are experimenting with using digital retailing tools to eliminate the need for a separate F&I sales step. Eliminating the “box” is a scary thought for many dealers, though, since F&I gross profits are key to the overall profitability of a dealership.



The next generation of responsive websites must include seamless tools to allow consumers to easily calculate the value of their trade, select financing options that match their credit worthiness, and purchase their vehicle online. Dealer.com has integrated digital retailing with their MyCars customer login feature. The company is pioneering the ability for consumers to create an account on a dealer’s website and allow them to receive similar value that they would find with user accounts on eCommerce websites.

Website platforms must also be able to track conversion inside of their digital retailing applications. This is a challenge since they often are presented on a website page that is not part of the dealership’s website. This challenge is similar to the iframe “blind spot” that dealers are faced with using the current technology designed for service scheduling and stand-alone finance applications.

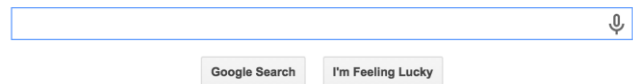
Without open standards for tracking engagement and conversion, the promise of a true digital retailing environment will be delayed. Multi-platform website technology, which is how it is implemented today, makes it difficult to track the true ROI of digital retailing.

THE NEXT GENERATION OF AUTOMOTIVE WEBSITES

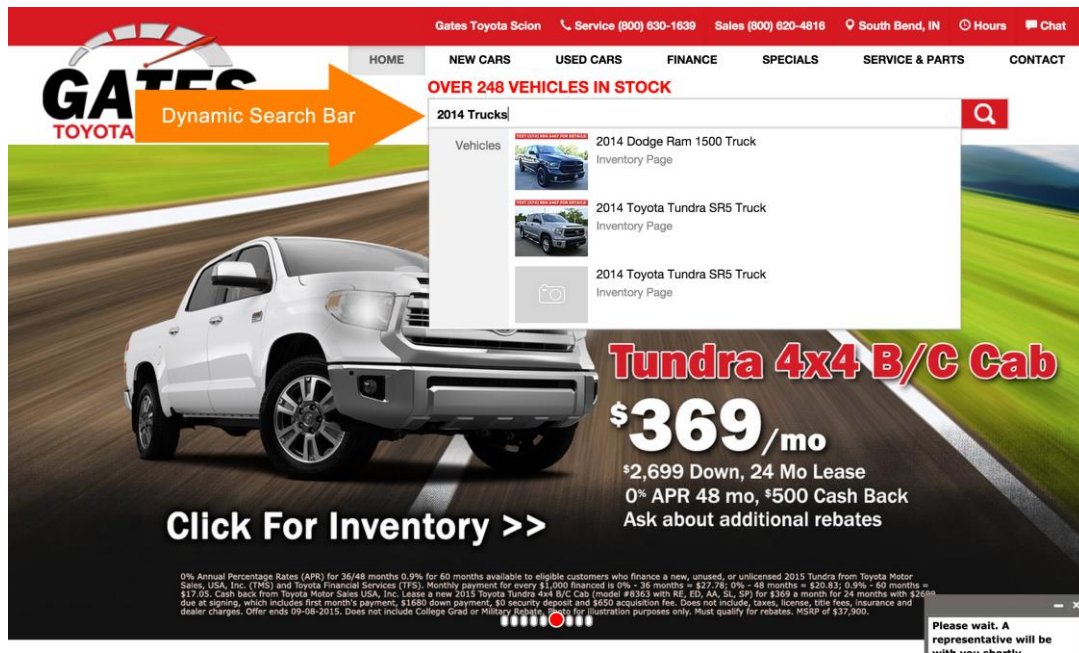


DYNAMIC INVENTORY SEARCH BAR

Consumers may not be aware how influential Google has been in educating consumers on how to search for products online. The simple Google interface is the standard for online search.



So why do so many dealership websites omit an open search tool? The ability to search for a vehicle on a dealership website by entering a year, make, and model is such a simple request, and yet, only **DealerFire** and **Dealer e-Process** offer this feature by default.



Consumers can conduct their own ad-hoc site search, on any page, to find information. In the example above, as the consumer types the word “special,” the Dealer e-Process platform will **dynamically** show vehicles and service coupons that are relevant to that keyword.

This is exactly how consumers have learned to search on Google. The feedback to keyword choices is instant, just like Google’s search engine. As a result, consumers quickly learn how to navigate through the hundreds of pages that are available on a typical dealership website. This value of the site search feature is amplified on a mobile device where screen space is limited.

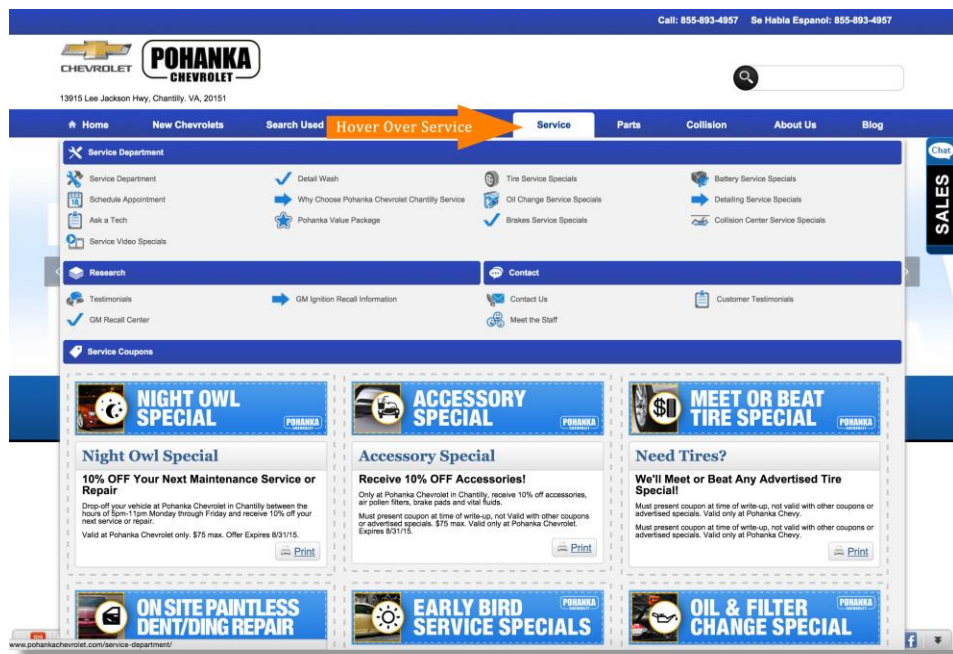
The ability for consumers to search for vehicles, parts, and service specials, like they do on Google, removes friction from the online shopping experience.

MEGA MENUS

In the last 10 years, the number of content pages on dealership websites has been on the increase, as dealers realize the need to include original content for SEO. However, for many dealers, their website menus have become cumbersome and unruly.

According to Dave Page, partner at Dealer e-Process, “A thorough testing of how consumers use a website’s menus revealed that the traditional navigation menus, used in the auto industry, were ripe for redesign.”

Mega-Menus allow consumers to visually see all the popular options on the dealer’s website, while also being beneficial to the dealer for SEO purposes.



The improved visualization and navigation is not the only benefit. The Mega-Menu design also has improved the search visibility of website pages that were previously neglected by website designers. By including all website pages in the Mega-Menus, page relevance to Google has increased which has improved SEO rankings.

In the example above, as a consumer hovers their mouse over the traditional menu bar, a customized set of dropdown screens appear to visually entice consumers to engage with website content. The example shows relevant pages and inventory that are associated with the hover over “Service.”

The visual tools provided on this menu are much more engaging for consumers who visit the website. The menu iconization also helps create a user-friendly research environment. This approach has been used in other automotive retail websites, including www.meineke.com.

CUSTOMIZABLE VEHICLE DETAIL PAGES (VDP)



The dealership's vehicles (products) are displayed on Vehicle Detail Pages (VDP). Having the ability to fully customize how those products are displayed is not common in the automotive industry.

Website providers often will offer a fixed set of VDP templates, but all have limitations. Dealer e-Process is the first company to offer fully customizable and responsive Vehicle Detail Page (VDP) designs.

In the example on the left, the dealer's Vehicle Detail Pages (VDP) are created using a

series of widgets, which enables drag-and-drop redesign. Each widget can be moved to any place on the page, which allows for A/B testing of VDP design to see which converts better when consumers view vehicles online.

The ability to customize the VDP design is important, but so is the marketing content that is associated with each vehicle. Dealer e-Process has a complete library of widgets that allow dealers to create simple or robust content delivery on each Vehicle Detail Page. Their VDP tools include all commonly available vehicle features as well as:

- ✓ Largest Photo Size in the Industry
- ✓ eAutoPayments
- ✓ Vehicle Details & Installed Options
- ✓ eAuto Appraise
- ✓ 8 Customizable Pricing Fields
- ✓ Used Vehicle Original MSRP Data
- ✓ Vehicle Inventory Videos
- ✓ 360 Degree Interior and Exterior Views
- ✓ Vehicle Owner Manuals
- ✓ Vehicle Brochures
- ✓ NHTSA Safety Crash Test Ratings
- ✓ Vehicle Green Scores
- ✓ Vehicle Awards & Accolades
- ✓ Vehicle Window Stickers
- ✓ Customized Thank You Pages
- ✓ Automated Incentives and Specials
- ✓ Similar Vehicles
- ✓ Customer Testimonials
- ✓ Dynamic Call Tracking on New and Used

UPGRADED ADVERTISING REPORTS BY CHANNEL

The quality of dealership advertising reports must also be improved. In fact, too many dealers are operating online advertising campaigns with little visibility into the effectiveness of their marketing dollars. Dealers cannot evaluate the quality of their advertising click traffic by only metrics such as:

- Cost per Click (CPC)
- Click Thru Rate (CTR)
- Cost per Lead (CPL)
- Impressions
- Bounce Rate

Dealers need a new set advertising reporting tools that show their investment in each vehicle as well as what percentage of their click traffic is actually searching for vehicles. Dealers would be shocked to see just how ineffective some paid advertising campaigns are at driving shoppers to their website.

When dealers understand that they are in the eCommerce business, they will start to require management reports which gives them granular inspection of each product that they are marketing online.

Dealers need to understand the **channels** that are available to drive traffic to their website such as AdWords, Facebook, Twitter, LotLinx, YouTube, Craigslist, etc.

Defining New Key Performance Indicators (KPI)

New standards for online advertising and referral traffic must include engagement data on vehicle Search Results Pages (SRP) and Vehicle Detail Pages (VDP). The industry should consider defining a **Cost per Vehicle Engagement (CPVE)** metric which would reflect the click activity on vehicle pages for chat, financing tools, photo galleries, and videos.



Comparison of Automotive Website Platforms

We have summarized some of the key features that we believe constitute the next generation of automotive website platforms. We have included seven popular website companies. A more complete review of all prominent website platforms can be found in the 2015 Automotive Website Awards (AWA) research report.

To create the table, our team conducted public research on numerous website examples⁸. We also invited each company to respond to a questionnaire to assist our completion of this table. *Since all dealers may not be on the website company's latest platform, inconsistencies can exist when an audit is conducted.*

Features	CDK Global	Dealer.com	Dealer eProcess	DealerFire	DealerOn	Naked Lime	VinSolutions
Creates digital retailing tools to move consumers toward a self-directed purchase	○	●	●	○	○	○	○
Integrates manufacturer incentives and rebates seamlessly	●	●	●	●	●	●	●
Supports Google Tag Manager installations	●	●	●	●	●	●	●
Offers intuitive web platform tools allowing for easy page creation and management	●	●	●	●	●	●	●
Scales content and experiences to cater to the capabilities of each device	●	●	●	●	●	●	●
Delivers a robust implementation of the schema.org markup language	●	○	●	●	●	●	●
Provides optimized vehicle photo galleries for each device	●	●	●	●	●	●	●
Offers complete navigational menus across all device types	●	●	●	●	●	●	○
Displays multiple phone numbers consistently on web pages across all device types	●	●	●	●	●	●	●
Tracks consumer engagement on website pages including 3rd party plugins	●	○	●	●	●	●	●
Integrates reporting for conversions on lead forms, chat, texting, and phone calls	●	○	●	●	●	●	●
Offers "Google style" dynamic search bar with real-time feedback	●	○	●	●	○	○	○
Offers robust tools for drag and drop page design on SRPs and VDPs	●	○	●	○	○	●	○
Customizes consumer experience based on website and offsite data	●	○	○	○	○	○	○
Integrates validated consumer reviews to build trust with shoppers	●	●	●	○	●	●	○

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Notes on this table

While all website providers can include digital retailing tools on their SRP and VDP pages, only two website companies have developed their own software tools. The advantage to these companies is that they can track conversion more accurately and can eventually build native tools to eliminate the iframe blind spot.

While some companies feel that the mobile experience should have reduced choices and phone numbers, we disagree. Phone numbers for sales, service, and parts that appear on the desktop version of the dealership's website should be available on a smartphone. In some cases, we were told by website companies that the dealer chose a layout with less phone numbers to be displayed on a smartphone.

Since most website companies do not own their own chat and texting solutions, conversion tracking and reporting is hindered when dealers attempt to track the effectiveness of their marketing investments. Website technology vendors and platform providers have been slow to integrate shared data using Application Program Interface (API) communication. The industry must evolve to create more accurate conversion reports for all referral traffic and all methods of consumer engagement.

While some website companies will argue that dealers do not need to have tools that allow drag-and-drop design control over Search Results Pages (SRP) and Vehicle Detail Pages (VDP), it is our position that as

dealers realize that they are in the eCommerce business, full control of their product pages will become the new standard.

Final Considerations

Today the automotive industry is enjoying a robust sales environment. Massive mergers and acquisitions are occurring while interest rates are low and cash flow is strong. The consolidation of “mom and pop” dealerships is not the only area that is being targeted by investors. The companies that serve auto dealers are also going through massive consolidation.

In the past 18 months, billions of dollars of transactions have closed. Cliff Banks, author of [The Banks Report](#) as well as in my white paper “[The Six Horsemen of Automotive Innovation](#)”, predicated vendor consolidation. Today there are only four horsemen left in the race and the opportunity for greater disruption is ever-present.

Despite all the hype, dealers are still looking for the innovations that these mergers had promised. For the most part, mergers have slowed the promises made by many companies, which has only served to frustrate the larger dealer body.

It is in this context that dealers and OEMs have to be careful about putting all their eggs in one basket. Any time a large merger occurs, there are key executive departures that defined the original formula for success. Aside from leadership vacuums, large mergers also create customer service and sales challenges while figuring out the new integrations of the companies.

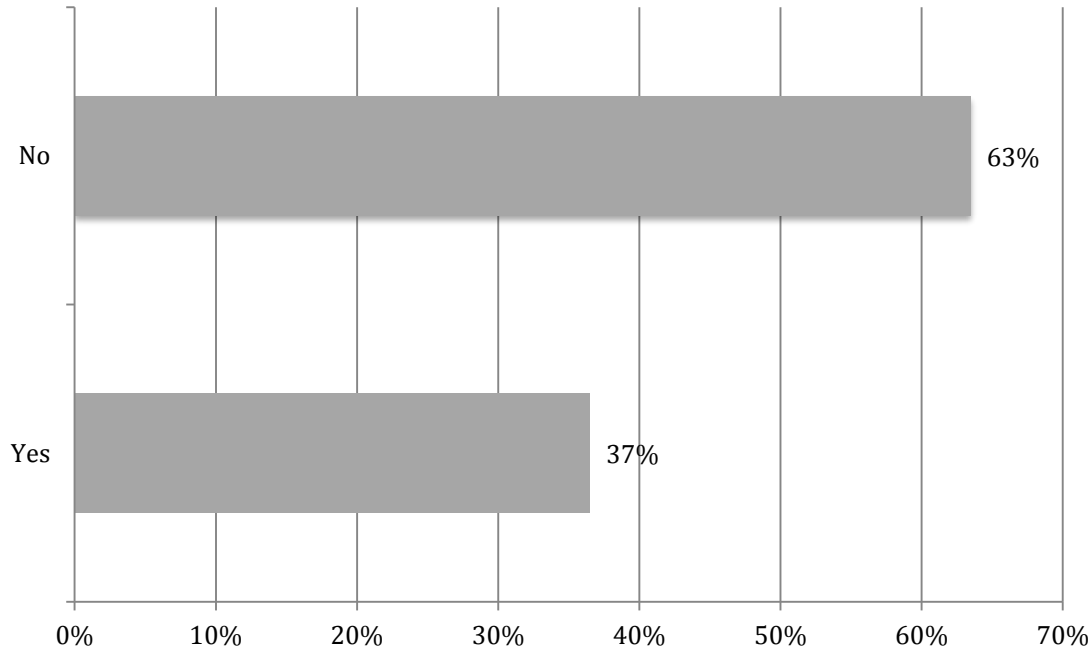
It is our position that OEMs and dealers are NOT best served by having a single website provider across all their franchise locations. When one website platform is chosen, competition is eliminated and laziness can set in with the website provider. When multiple choices exist, competitive forces keep each development team busy to deliver the best products and consumer experience for dealers.

Dealers who want a more boutique customer support experience will find that smaller website companies have the ability to meet their needs. It is not that larger website companies do not have superstars on their support teams, it is just that scaling to serve thousands of dealers is a challenge. When you add in that larger companies often secure OEM contracts, dealers often have to abandon great technology because the OEM is forcing the dealership to use only one platform.

When we surveyed dealers about the influence of OEM mandated platforms on their choice of primary websites, the responses were very enlightening. 63% of the dealers surveyed, as part of the 2015 PCG Automotive Website Survey, said that their OEM requirements had little influence on their current choice of primary website.

Dealers are not confident that their OEM partners are making the best decisions for their business in regards to website vendor selections.

Was your choice in website company influenced by OEM requirements or a list of approved vendors?



The responses from dealers in the 2015 PCG Automotive Website Survey highlight their desire to be entrepreneurs and to stand out from their local franchisees. While the OEM can understand their position, brand consistency and data sharing are a much higher priority than dealer website choice. Can there be a middle ground?

The automotive industry must work together to develop new data sharing standards. The last time a data standard was developed was 15 years ago, in the year 2000. That is when the ADF/XML file formats were established for lead sharing between websites, CRM platforms, and third-party lead providers.

The auto industry must define independent data sharing standards that will reduce the cost to OEMs who want to give dealers a choice of website platforms and advertising providers. Without open data sharing standards, OEMs are forced to limit choices to dealers.

The bigger question is who will demand that the vendor community meet to create these new data standards? It is our opinion that it must be led by an OEM team who believes in dealer choice, but also demands that they can maximize their advertising and marketing investments across their dealer network.

CDK Global – A Potential White Knight?

There is also a possibility that CDK Global, which has rich experience dealing with OEMs, could decide to depart from their exclusive stance on website technology. Would it be beneficial for CDK Global to allow other website companies to contribute to their advertising and analytics platform?

If CDK Global creates an open reporting platform, where multiple companies could integrate via an Application Program Interface (API), dealers and OEMs could benefit greatly. CDK Global would have a platform that could compete with OEM dealer management companies like Shift Digital.

The one unknown is if CDK Global would be more transparent with their operating margins and more competitive vs. other OEM management choices.

A mature, open Digital Marketing Platform (DMP) with consolidated reporting to the OEMs, could put into question the current “middleman” model — a model that we reviewed in a previous PCG Research report. You can download a copy here: <http://bit.ly/1QCMuvr>.

It will take bold leadership from CDK Global to unite companies that have previously seen each other as competitors. If vendors don’t unite, then their margins will be compressed by middlemen. Margin compression can degrade customer support services or will require dealers to pay higher prices.

The Giant in The Making

What about Cox Automotive? Could their pending merger with Dealertrack Technologies yield a robust Digital Marketing Platform (DMP) that could directly challenge the Shift Digital model? The possibility exists, yet Cox Automotive will have at least two years of integration headaches to deal with first. This could hinder their ability to compete with CDK Global if they wanted to offer a competing OEM DMP model.

The merger will likely result in VinSolutions getting out of the website business. We believe that their customers will be migrated to the Dealer.com platform. The merger will also likely result in Dealer.com CRM being phased out and VinConnect becoming the CRM platform of choice. These two decisions, along with eliminating the overlap in inventory management and marketing pricing tools, will keep the Cox Automotive busy to avoid defections due to product consolidation delays.

Educating The Dealer Community

Dealers should demand more from their website vendors but they need to be educated on the features that can impact their online marketing strategies. The checklist that we created in this report is one tool to guide a discussion between dealers and website providers. Our hope is that dealers will have a renewed purpose to create an enhanced consumer experience to increase sales, service, and brand loyalty.

Dealers can also use the information in this report to inform their OEM dealer advisory boards to make smarter choices for the dealer network: choices that are based on facts, innovation, and sales performance. Our industry must work together to reimagine the online car shopping experience for consumers! It is time for dealers to invest in [digital marketing education and certification](#) and PCG is leading that charge.

References

¹ Average website traffic from 600 dealership website in the United States inspected by PCG Companies.

² 2015 Automotive Website Survey conducted by PCG Companies and CBT Automotive Network.

³ Google's Mobile Friendly Test - <http://bit.ly/1Ay05AF>

⁴ Mobilegeddon – Recent articles on this update can be found on SearchEngineLand.com including this update in May 2015 <http://selnd.com/1KocuHl>

⁵ Origins of RESS by author Luke Wroblewski <http://www.lukew.com/ff/entry.asp?1392>

⁶ As documented by <http://schema.org>

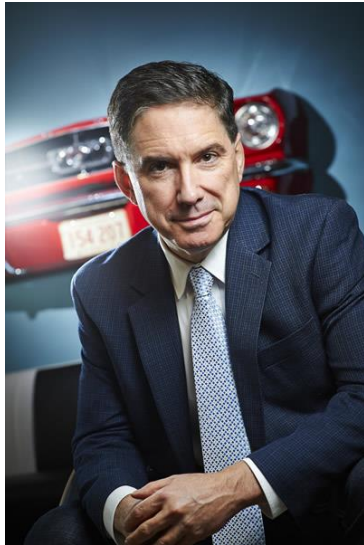
⁷ Google Structured Data Tool can be found here: <http://bit.ly/1NpQDkm>

⁸ Website Feature Comparison based on random website selections by vendor. Readers can inspect website features for each vendor listed in the feature comparison table by visiting:

- CDK Global: www.classicchevrolet.com
- Dealer.com: www.prestigevolvo.com
- Dealer eProcess: www.smarttoyota.com
- DealerFire: www.gatestoyota.com
- DealerOn: www.youngertoyota.com
- Naked Lime: www.lancastertoyota.com
- VinSolutions: www.kengrodyford.com

⁹ PCG and Northwood University press release announcement <http://bit.ly/1M4UBA6>

About PCG Research



Brian Pasch, founder of PCG Companies, formed PCG Research to provide comprehensive product research for the automotive community. Brian has been actively involved with automotive franchise dealers since 2005.

Prior to working in the automotive industry, Brian ran a large Information Technology team in the direct response industry. He oversaw the creation of an industry-leading data warehouse for a consumer telemarketing and direct mail data. Prior to that role, Brian worked as a Senior Telecom Analyst at Goldman Sachs in New York City.

Brian has authored three best selling books for the automotive industry: “Mastering Automotive Digital Marketing,” “Selling Cars in a Digital Age,” and “Unfair Advantage.” His books are available on the Apple iBook store as well as Amazon.com. His books are also being used at **Northwood University** to educate the next generation of automotive professionals⁹.

Brian is now pioneering a new style of online education for the automotive industry. Details on his strategy can be found by visiting www.pcgtraining.com.

Brian is an active conference speaker, 20 Group presenter, and coach to both dealers and members of the vendor community. Brian has presented workshops at NADA, Digital Dealer, DrivingSales Executive Summit, Kain Automotive Workshops, Automotive Boot Camp, AutoCon, VinWorx, and the Digital Marketing Strategies Conference.

Brian has led PCG’s expansion into international markets where his training curriculum is being utilized by dealer groups and manufacturers as part of a change management process.

PCG is also the driving force behind the automotive industry’s most respected annual awards for marketing technology, the [AWA Awards](#). Each year Brian and the PCG team conduct in-depth product reviews to assist dealers choose the best technology for their business operations.

PCG has an online Learning Center for automotive professionals to master skills associated with digital marketing, sales process, and Google Analytics.

For information regarding this report or to inquire about contracting with PCG Research to create a research report, please contact:

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