



NAVIGATING THE
ELECTRIC VEHICLE
CURVE AHEAD

ACX IOM

MAKING THE CASE FOR IDENTIFYING AND ENGAGING PEOPLE NOW, WHEREVER THEY ARE ON THEIR PERSONAL JOURNEYS TO ELECTRIFIED TRANSPORTATION

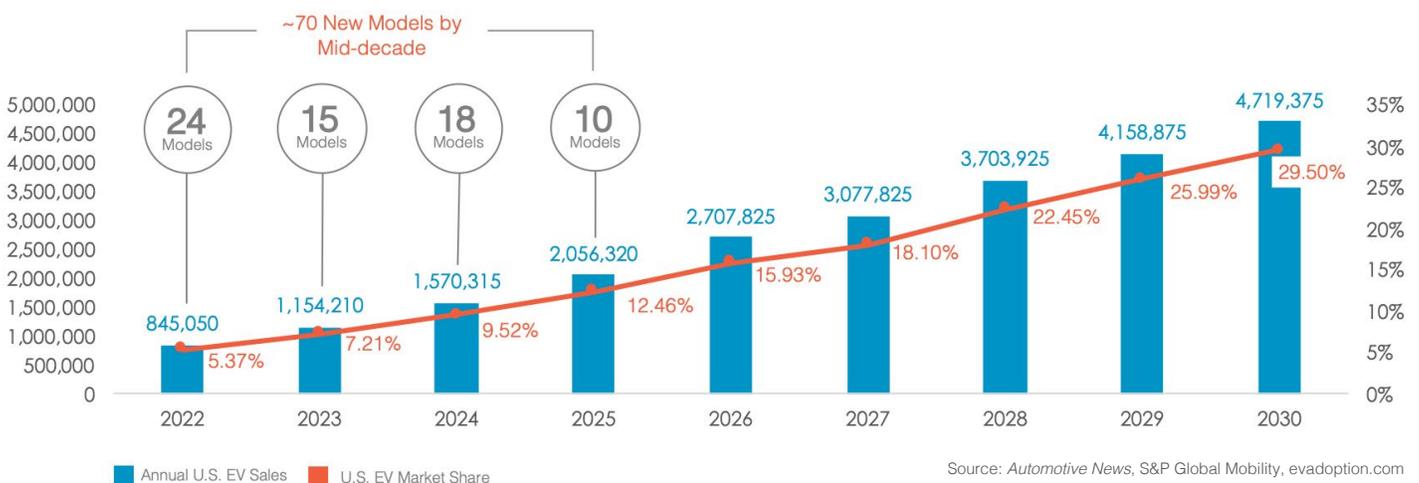


There have been countless stories surrounding the automotive industry's push to electric vehicles (EVs), and they have explored lots of topics – everything from navigating unprecedented supply chain disruptions that are requiring brands to balance investment in existing and new advanced automotive technologies, to the creation of new EV-only brands and iconic vehicles and nameplates now being offered with electrified powertrains. From new partnerships to proposed legislation and regulatory policies designed to curb climate change, drive infrastructure investment and spur economic growth. Make no mistake, the question is no longer if EVs will scale. EVs are here to stay for the foreseeable future. The question now is when most people will feel comfortable buying a vehicle powered by something other than an internal combustion engine (ICE).

THE TIPPING POINT FOR ELECTRIFICATION IS NOW

Not too long ago conversations about EVs included debate regarding when there might be some sort of tipping point to mass adoption of vehicles powered by electricity and other hybrid powertrains. A number of complex factors fueled that debate, but several consumer surveys reveal, and many experts agree, that as the total cost to own and operate an EV declines, people's interest will increase. The next three or four years will test that hypothesis, particularly in response to rising gas prices and other inflationary pressures, as approximately 70 new EVs hit U.S. markets by the end of 2025 and estimated EV market share in America exceeds 10 percent of the approximate 17 million new vehicles analysts forecast will be sold that year in the U.S. (Figure 1).¹

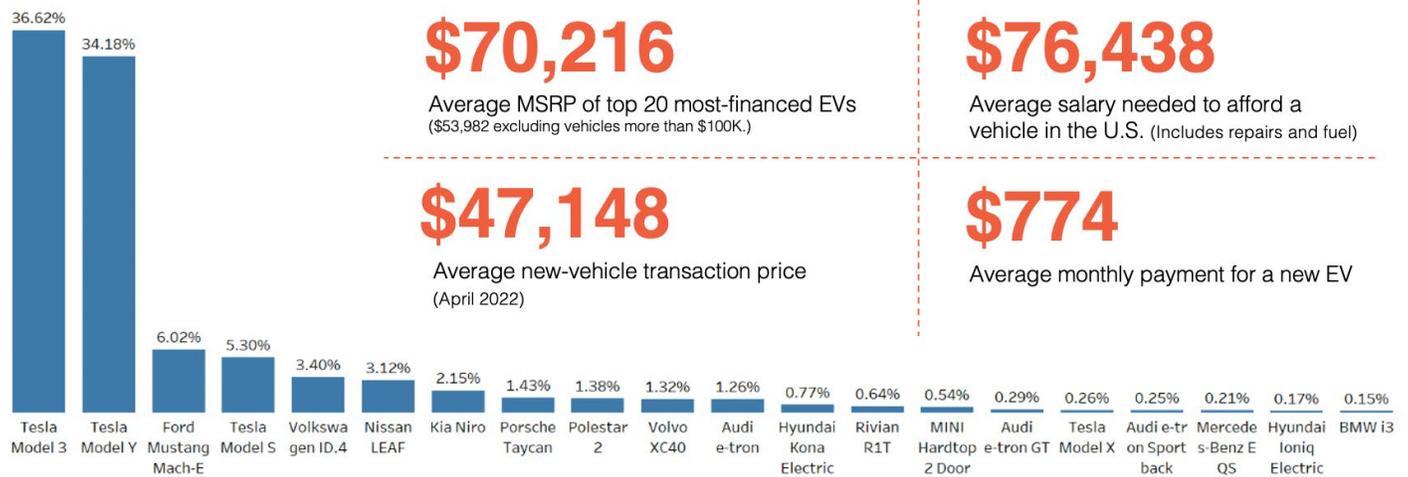
Figure 1: Number of EVs Launching in the United States



¹ "2022 auto industry forecast: Chance of pain" Automotive News October 18, 2021.

Consider this, the Nissan Leaf – the world’s first mass-marketed EV – was first introduced in the U.S. in December 2010.² Ten years later, in 2021, EVs represented about 4 percent of all new-vehicle sales.³ It took a decade to reach approximately 535,000 in annual sales of EVs in the United States.⁴ Moreover, those EVs that were sold were expensive. As of the fourth quarter of 2021, the average MSRP for the top 20 EVs financed in the U.S. topped \$70,000 with an average \$774 monthly payment (Figure 2).

Figure 2: Top 20 EVs Financed in the United States (Q4, 2021)



\$70,216

Average MSRP of top 20 most-financed EVs (\$53,982 excluding vehicles more than \$100K.)

\$76,438

Average salary needed to afford a vehicle in the U.S. (Includes repairs and fuel)

\$47,148

Average new-vehicle transaction price (April 2022)

\$774

Average monthly payment for a new EV

Source: Experian, Market Scan, Edmunds, US News, KBB, GoBankingRates.com

If a decline in the total cost to own and operate an EV is indeed a fundamental driver for more people making the move away from ICE-powered vehicles, then it’s not surprising that the pace for adoption thus far has been relatively flat. It’s expensive to own a vehicle in the U.S. On average, a person needs to earn more than \$76,000 in America to afford a vehicle⁵ and the average transaction price for a new vehicle in the U.S. exceeded \$47,000 as of April 2022.⁶

Simply put, until now it’s been expensive to buy an EV. But that’s about to change with the introduction of dozens of EVs that appeal to a wider demographic, in terms of both affordability and the diverse portfolio of vehicles that will be available ranging in size from subcompacts to full-size trucks and SUVs. As evidence, EV registrations in the U.S. more than doubled in the first quarter of 2022 compared to the first quarter of 2021.⁷

The rollout of EV models that appeal to a broader range of people leads analysts to believe, and industry executives to expect, a sustained adoption of EVs in America and market share to more than triple by mid-decade – reaching nearly 30 percent of all new-vehicle sales in the U.S. by 2030. In the near-term, inflationary pressures surrounding fossil fuels and other goods may also spur interest in people switching to vehicles powered by electricity. In other words, the tipping point for electrification is now.

COSTS TO OWN AND OPERATE: EVS, HYBRIDS AND ICE VEHICLES

ELECTRIC VEHICLES

OPERATING COSTS	OWNERSHIP COSTS
\$1,704	\$7,589
TOTAL COST PER YEAR: \$9,293	TOTAL COST PER DAY: \$25.46
	TOTAL COST PER MILE: \$0.62

HYBRIDS

OPERATING COSTS	OWNERSHIP COSTS
\$2,206	\$6,803
TOTAL COST PER YEAR: \$9,009	TOTAL COST PER DAY: \$24.68
	TOTAL COST PER MILE: \$0.60

ICE VEHICLES*

OPERATING COSTS	OWNERSHIP COSTS
\$4,422	\$6,225
TOTAL COST PER YEAR: \$10,647	TOTAL COST PER DAY: \$29.17
	TOTAL COST PER MILE: \$0.71

Source: AAA 2021 Your Driving Costs Report (Aug. 2021). ICE vehicles analysis represents average of all internal combustion engine-powered segments listed in AAA’s report. Assumes 15K miles per year. Operating costs include fuel and maintenance. Ownership costs includes insurance, license, registration, taxes and finance charges. <https://newsroom.aaa.com/wp-content/uploads/2021/08/2021-YDC-Brochure-Live.pdf>.

* Operating costs for ICE vehicles in the table above updated by Axiom to reflect the average price for a gallon of gas in the U.S. on June 13, 2022 (\$5.014 per gallon).

2 “A decade of innovation – the LEAF’s incredible journey” Nissan Motor Corporation December 4, 2021.

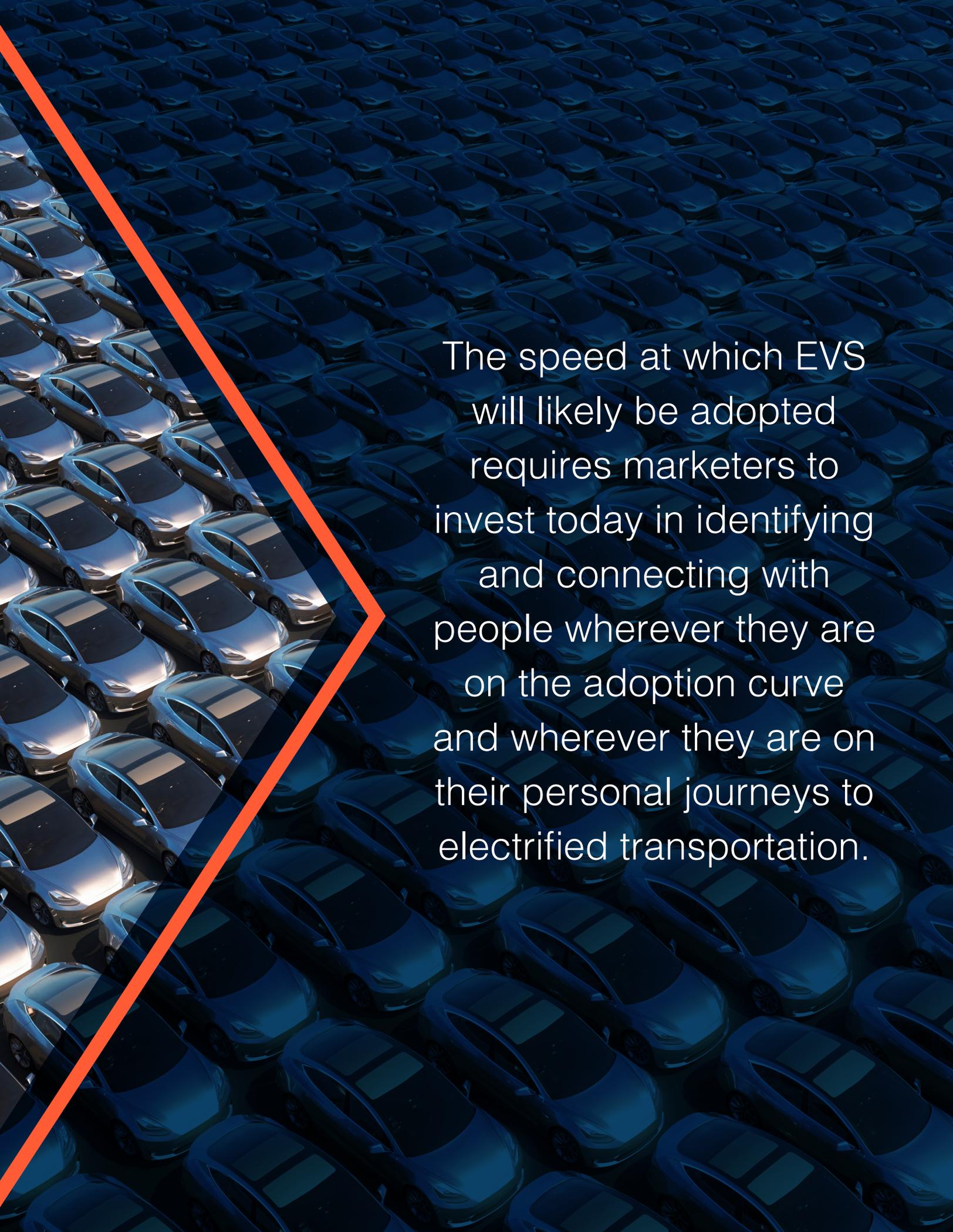
3 “Electric vehicles dominated Super Bowl ads but are still only 9% of passenger car sales” CNBC February 14, 2022.

4 Ibid

5 “This Is the Salary You Need To Afford a New Car in Your State” GoBankingRates.com June 24, 2021.

6 “New-Vehicle Prices Flirt with Record High in May, According to Kelley Blue Book, as Luxury Share Remains Strong” Cox Automotive June 9, 2022.

7 U.S. EV registrations surge 60% in Q1, driven by Tesla, Ford, new Korean models” Automotive News May 10, 2022.



The speed at which EVs will likely be adopted requires marketers to invest today in identifying and connecting with people wherever they are on the adoption curve and wherever they are on their personal journeys to electrified transportation.

DIFFERENT VOLTS FOR DIFFERENT FOLKS

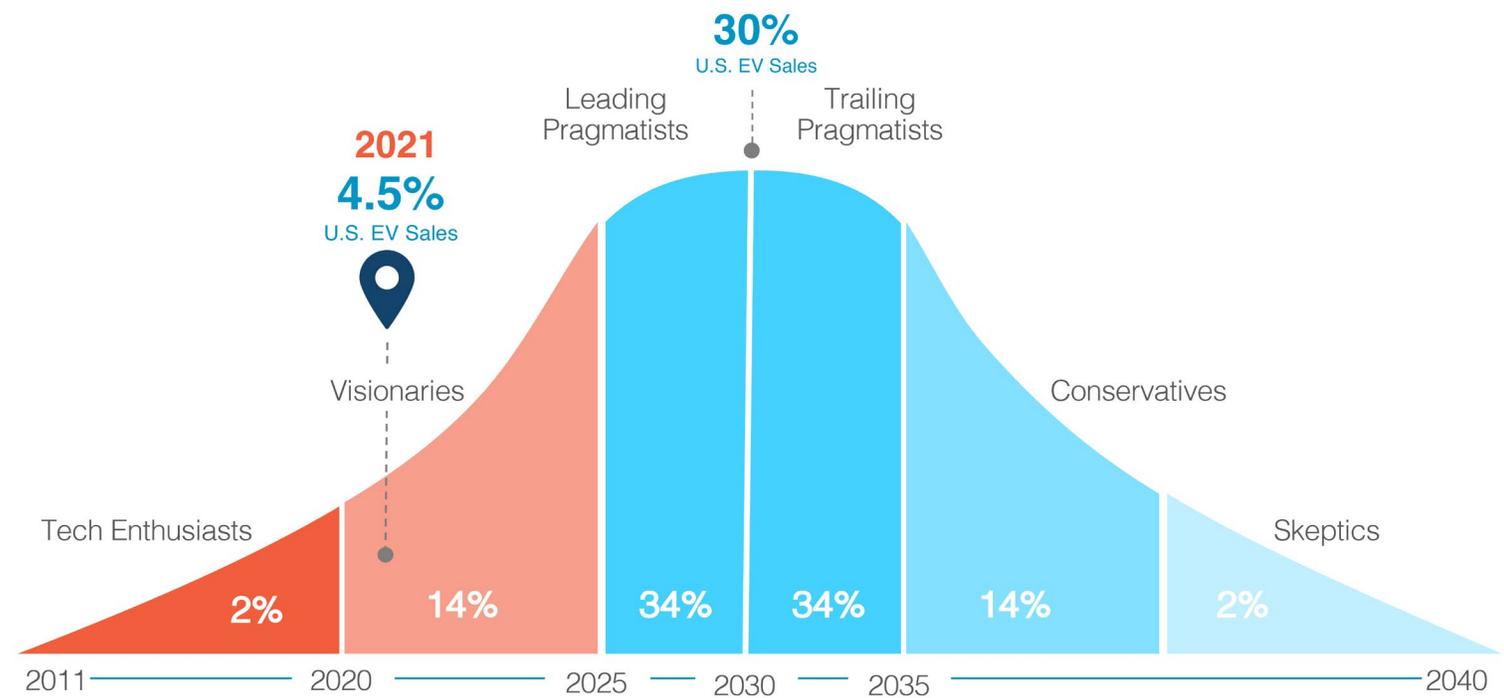
While having more vehicle options and different price points to choose from will result in more people considering and ultimately purchasing an EV, adoption will more than likely follow a traditional bell curve like the adoption of other innovative technologies and products like smartphones, CD and DVD players and flat-screen TVs – products that were expensive when first introduced and appealed to early adopters (often affluent tech enthusiasts) only to scale among everyday people as the cost to own and operate those products declined.

We believe the adoption of EVs in the U.S. will follow a similar pattern, both in the price of the vehicle as well as costs for maintenance, repair and daily operating costs like charging as ubiquity increases. In fact, we believe the time when EVs appealed to a narrow demographic of affluent tech enthusiasts is in the rearview mirror, and the U.S. market is entering a new phase of adoption (driven by dozens of new EVs launching by mid-decade) where vehicles powered by electricity appeal to a wider swath of people (Figure 3). This will be driven by several factors including affordability, inventory, quality, reliability and serviceability, and general population acceptance.

Of critical importance to automotive marketers is understanding the rapid acceleration in the number of people who may be interested in buying an EV and the time horizon for when those people may be in-market. Marketers working on EV-related campaigns need to understand the significant implications and opportunities associated with the EV adoption bell curve and further understand that the speed at which EVs will likely be adopted requires marketers to invest today in identifying and connecting with not only the visionaries and leading pragmatists, but everyone wherever they are on the adoption curve and wherever they are on their personal journeys to electrified transportation.

Education driven by multiple inflection points in an individual's daily life will play an important role in the adoption rate among most people, illustrating the critical role marketers must play and the diverse storytelling they must hone as part of their efforts to conquest and win market share among people ready to buy today and educating people still several years away from buying their first EV.

Figure 3: Electric Vehicle Adoption in the United States



Source: Axiom analysis



It is important to not lose sight of your existing customers that drive ICE-powered vehicles in efforts to today identify, target and engage potential EV buyers. Not mining your brand's first-party customer data may result in other brands conquering your current customers to their model of EV. As an example, Tesla ran no advertisements during the Super Bowl yet reported in its Q1, 2022 financial statements a surge in orders the day following the game as a result of other brands' EV commercials broadcast during the event.

A FRAMEWORK FOR HYPERTARGETING EV BUYERS

How to engage people now who may be interested in buying an EV today or tomorrow



It has taken a decade for EVs to reach approximately 5 percent of U.S. market share. However, that pace will only quicken in much the same way that the pace of technology innovation – regardless of product – has exponentially accelerated in the 21st century. Game-changing smartphone technologies first introduced in the early 2000s that are now ubiquitous worldwide are straightforward use cases that can be easily applied to the adoption of EVs. Now that the tipping point to electrification is here because of more affordable models that appeal to more people, the percentage of new-vehicle sales representing vehicles powered by electricity will, according to several forecasts from both industry analysts and automakers, multiply by as much as 6X by 2030 (Figure 3).

Automotive marketers should be cautious, however, to not be caught flatfooted. A future where EVs represent approximately 30 percent of U.S. market share will be upon us soon. In fact, when considering traditional automotive product development cycles, vehicles slated for introduction in the late years of the decade (2027-2030) are already in development.

Because of the rapid adoption of EVs, powered by the rapid evolution in how people think about vehicles powered by something other than fossil fuels, we believe automotive marketers cannot take a “one size fits all” approach in their marketing strategies. To do so, we believe, runs the risk of spending on advertising that does not appeal to people ready to buy today and risks not resonating in ways that helps convince people that an EV can soon fit into their lives.

We have developed the following framework to help brand leaders and marketers navigate the different consumer personas that fall along the EV adoption bell curve and outline the core mission automotive storytellers should focus on in personalizing EV marketing (Figure 4).

Figure 4: Framework for Hypertargeting EV Buyers



TECH ENTHUSIASTS

Conquest by communicating why new brands of EVs are better than the ones they drive today

Simply put, tech enthusiasts more than likely already own an EV. According to our modeling, they are highly educated, affluent and often work in professional or technical fields. Mostly married with older or adult children (sometimes living in the home), tech enthusiasts likely own multiple ICE vehicles or EVs. They are less concerned with the cost of owning and operating an EV, opting instead for the joy and prestige associated with driving an innovative and luxury vehicle.

Tech enthusiasts are also likely to be more forgiving when technology glitches occur, often equating updates to the innovative experiences they seek when driving to similar updates they frequently receive on their smartphones. In fact, many likely consider software and other technology updates facilitated by automakers as making their EVs better – further delivering a customer experience that helps build long-term brand loyalty.

Given the availability of electric models on the market when these people bought their EVs, tech enthusiasts likely own one specific brand that to date has dominated the EV market in the U.S. As new models of EVs from other manufacturers become available, the mission for marketers representing those brands should center on conquering these people by focusing advertising on why newly available EVs are better than the EV brands they drive today.

Winning new customers among this demographic might not be easy, however, given the fierce loyalty among many tech enthusiasts regardless if the brands they love are cars, smartphones or other innovative tech brands.

VISIONARIES

Win share by building trust among people ready to adopt electrified transportation

Like tech enthusiasts, visionaries are likely highly educated and often work in professional or technical fields, our modeling shows. They are middle- to high-income earners and likely own multiple vehicles. Many are married with pre-teen, teenage or adult children (sometimes living in the home). Visionaries also enjoy the status that comes with owning “cool” things.

Unlike tech enthusiasts, however, visionaries are likely more sensitive to cost and convenience. While they like the idea of owning an EV, many likely still don't completely trust the technology and have questions regarding how a vehicle powered by electricity might fit into their lives. Awareness of the rich portfolio of EVs coming to market is strong among these people based on significant investments automakers have made in advertising. And while visionaries may strongly consider adding an EV to the family fleet when they next purchase a vehicle, automotive marketers and retailers need to ensure they are armed with answers to pragmatic questions many will likely ask in making their final purchase decision, questions like:

- **How do federal tax incentives work? What are the incentives in this state?**
- **How much does it cost to install an EV charger in my garage?**
- **Does it cost a lot to maintain and service an EV?**
- **How many charging stations are in my neighborhood?**

Because of visionaries' strong interest in and ability to afford EVs, and because of their higher sensitivity to factors related to cost and convenience of owning and operating an EV, automotive marketers targeting visionaries should focus on winning share among the approximately 70 new models of EVs being launched by mid-decade.

Critical to winning share will be efforts to build trust in the brand and EV technology by proactively addressing questions that may give these people pause and ultimately impact their final purchase decision. Relative to building brand trust, automotive brands' customers who drive ICE-powered vehicles could be a priority audience for marketers and retailers, leveraging existing trust in the brand to supercharge efforts to build trust in EV technology.

LEADING PRAGMATISTS

Win share by demonstrating how EVs can lower cost of living without impacting convenience

Inflationary pressures have increased significantly since the turn of the decade, and lingering uncertainty regarding geopolitical tensions, U.S. and global economics, supply chain constraints and the pandemic are increasingly contributing to a higher cost of living for most people.

As predominantly middle-income earners, leading pragmatists are likely more impacted and concerned with inflationary pressures and are likely already feeling the consequences and looking to reduce expenses as the daily cost of living increases. At the same time, leading pragmatists understand the convenience and sometime cost savings that can come from adopting new, innovative technologies. Illustrative example use cases include smart thermostats that can better manage home heating and cooling costs and do-it-yourself home security systems that are affordable and offer peace-of-mind and convenience via smartphone-enabled functionality.

The rising cost of living coupled with their understanding of and firsthand experiences with innovative technologies position leading pragmatists as an important demographic automotive marketers and retailers need to focus on engaging, particularly as supply chain issues begin to ease and more affordable EV models arrive in showrooms over the next 12 to 18 months. Rising interest rates and other government measures to curb inflation and climate change may further influence interest among these people, as might the outcomes of the 2022 and 2024 elections in the U.S.

Because of cost sensitivities among leading pragmatists, marketers and retailers looking to engage this demographic might consider strategies to win market share by targeting these people with offers that value the assets they already own while also reducing costs often needed to make the switch to electrification (Figure 5).

Figure 5: Strategies for Engaging Leading Pragmatists

STRATEGY	IMPACT
Leverage the inventory shortage and high price of used vehicles to make an exceptional trade-in offer.	Maximizing the value of the vehicle they drive today could entice leading pragmatists to sell and seek a replacement, ideally an EV.
Provide education on how switching to an EV can reduce the cost of living in the long term.	Understanding incentives that offset the cost to buy an EV and how operational costs are typically lower on an EV over the life of the vehicle can speak directly to the factors that influence leading pragmatists' purchasing decisions.
Communicate how EVs can fit into their daily lives.	Leading pragmatists are likely daily drivers, and their vehicles are essential to meeting their everyday needs. It's critical people in this demographic understand that EVs have the range to meet their requirements and also understand available charging options.
Make investments that offset costs often needed to make the switch to electrification.	The cost of installing home chargers or buying a charging subscription service may deter consideration among these people. Offering free home chargers with installation and annual maintenance services or complimentary charging subscriptions could offset those costs and concerns while also influencing a positive EV ownership experience.

TRAILING PRAGMATISTS

Educate people about EVs so they feel comfortable and confident about making the switch when ready to buy

Like leading pragmatists, trailing pragmatists are likely sensitive to and feeling the impact of inflationary pressures and the rising cost of living. As middle- to lower income earners, trailing pragmatists' vehicles are affordable and require lower daily costs to operate (e.g., come equipped with smaller, fuel-efficient engines, etc.). They are also likely daily drivers and rely heavily on their vehicles to meet their daily needs.

Trailing pragmatists are likely several years away from adopting EV technology, but the rising cost of living and months-long horizon some economists forecast before inflationary pressures begin to ease could serve as powerful reminders among people routinely looking for ways to lower their household expenses.

Today, however, EVs are simply too expensive for trailing pragmatists. Still, automotive marketers and retailers should not ignore them nor wait to engage them at some point when the cost to buy an EV has declined.

The objective in engaging trailing pragmatists today should center on education, because they are still early in their journey of considering an EV. While the cost of EVs continues to decline over the next several years, marketers and retailers should use the time to help trailing pragmatists understand EV technology, how electrification can lower costs, and how making the switch will not impact their daily activities. Doing so will help build trust-based relationships with these people and help them feel confident they are making the right decision when they can afford it and are ready to buy their first EV.

CONSERVATIVES AND SKEPTICS

Education helps transform people into EV enthusiasts

For conservatives and skeptics, EV technology is likely something they don't understand or trust and cannot envision how a vehicle powered by electricity can fit into their daily lives. People in these demographics likely do and will continue to have the same reservations that have been routinely associated with EVs, including concerns with cost, convenience and range. Those concerns might very likely include limited access to at-home charging opportunities and daily activities like long commutes to and from work. Those concerns are likely exacerbated by a limited portfolio of affordable EVs available today.

As more models become available, costs decline and charging infrastructure scales, switching to EVs likely could become a more affordable option and make more sense for conservatives and skeptics who, like leading and trailing pragmatists, are also cost conscious and sensitive to fluctuations in daily cost of living. People in these demographics are also several years away from buying an EV, and like trailing pragmatists, automotive marketers and retailers have the opportunity to engage conservatives and skeptics now and focus that engagement on education and building trust and confidence in the technology.

SUPERCHARGING HYPERTARGETING OF EV BUYERS

Innovations in data, identity and technology can drive personalized, real-time CX at scale

A number of complex factors present challenges for automotive marketers and retailers and their efforts to engage people in ways that result in them buying an EV. Consider:

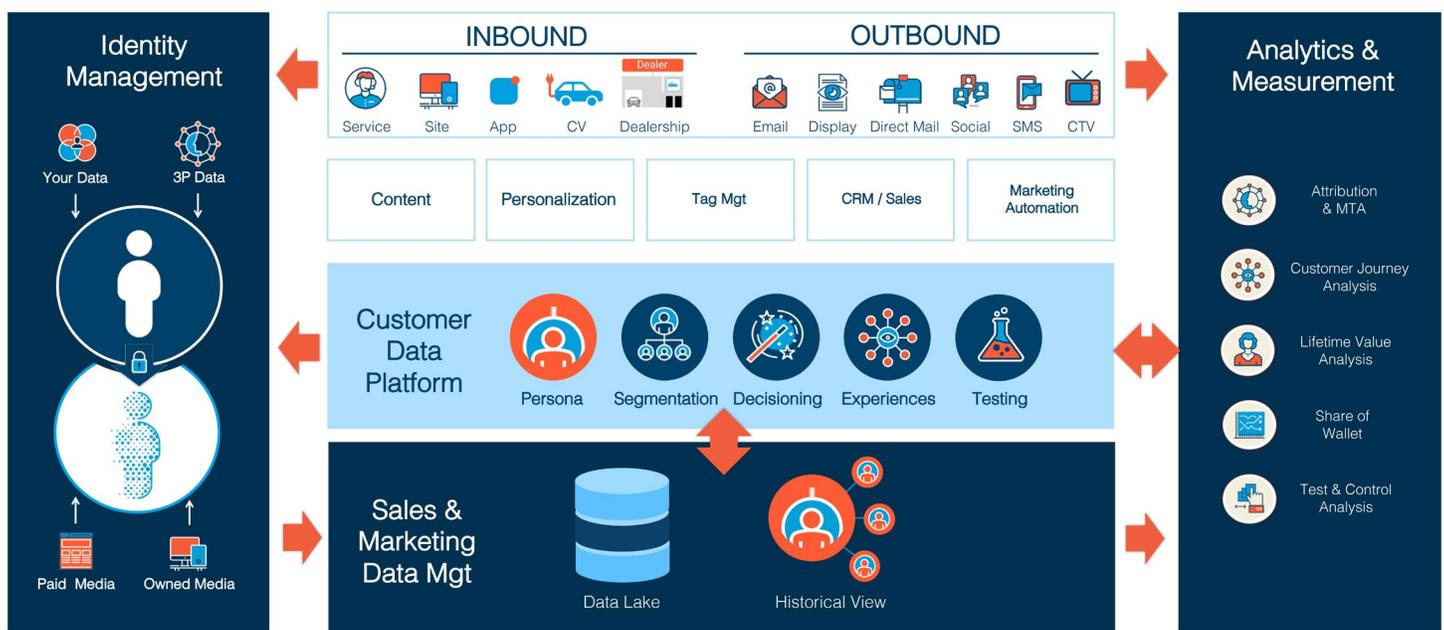
- **A large percentage of Americans who may be interested in EVs have diverse opinions regarding the technology and readiness to make the switch.**
- **There is a growing expectation among people for personalized, omnichannel experiences from the brands they choose to engage and do business with.**

- An extended but sustained growth trajectory of EV penetration and percentage of new-vehicle sales requires continuous, years-long engagement to build trust in EV technology and the brands behind those vehicles.
- There will be a continued entry of brands in the vehicle electrification business ecosystem (e.g., charge point providers, battery recycling and replacement providers, EV charging subscription service providers, local, state and federal governments, etc.) that will influence the EV customer experience.
- The impact of technology changes like the deprecation of third-party cookies and evolving regulation surrounding the privacy and protection of consumer data.

Navigating these complexities while also delivering the customer experiences people want in ways that create the most resonance can be hard for automotive storytellers. Brands that get it right can expect revenue increases of up to 15 percent and enjoy as much as 40 percent more growth versus their competition.⁸ At the same time, brands that don't embrace creating personalized customer experiences risk missed opportunities, which can lead to significant losses in lifetime customer value.

The good news is that innovations in data, identity and technology allow the creation of an integrated marketing system fueled by data and identity solutions that help create 360-degree views of people and help power a brand's customer data platform (Figure 6).

Figure 6: Bringing Data, Identity and Technology Together in an Integrated Marketing System



THE RESULT? Real-time personalization at scale and the ability to engage people wherever they fall on the EV adoption bell curve with personalized storytelling that can move forward the critical missions automotive marketers and retailers have related to each demographic (e.g., conquest, win share or educate). Moreover, automotive storytellers are also better able to measure attribution and impact by adopting and harnessing the full power of an integrated marketing system that brings together data and identity and activates that data via technologies like customer data platforms (CDPs).

⁸ "The value of getting personalization right—or wrong—is multiplying" McKinsey November 12, 2021.

ILLUSTRATIVE USE CASES

Leveraging innovations in data, identity and technology to engage people in their uniquely individual EV ownership lifecycles

Conquest

Target affluent people who seek luxury and who own an EV that are or will soon be in the market for their next vehicle.

Win Share

Target people who can afford an EV, enjoy “cool things,” may own an EV and are or soon to be in the market for their next vehicle.

Educate

Find, engage and educate people – particularly existing customers – not yet ready to buy an EV and may be 18-36 months away from buying their next vehicle.

Upgrade

Target people who own an EV or luxury ICE-powered brand vehicle with offers to upgrade to a vehicle that's better and costs about the same as they are paying today.

Service, Repair and Maintenance

Locate and engage people that own an EV in a specific geographic region with offers for routine service and maintenance or repair.

Charging Services

Locate and engage people that own an EV in a specific geographic area with charging related subscription services or information related to charge point providers and convenient charging station locations.



CREATING LIFETIME CUSTOMER VALUE AFTER THE SALE

EV purchases create opportunities to drive engagement and loyalty

As already noted, delivering the personalized customer experiences people expect can have a significant positive impact on revenue and a brand's advantage against its competitors. Personalization can also drive value in the form of more targeted media spend, resulting in opportunities to reduce cost or recognize greater returns on campaign investments.

Beyond selling the vehicle, however, it's equally important for automotive marketers and retailers to understand opportunities to engage people after they buy an EV. Doing so not only creates the opportunity to deliver delightful CX surrounding the entire ownership experience that can help drive brand loyalty but also unlocks other opportunities to generate revenue. How much opportunity? According to our research and analysis, approximately \$1,800 per vehicle in charging revenue (Figure 7). That equates to more than \$12,000 in revenue from charging alone when considering most Americans on average own 6.79 vehicles in their lifetime.

What's more, our research and analysis shown below in Figure 7 further reveals that revenue from subscription services (e.g., vehicle health monitoring, charging station location services, infotainment, etc.) can generate more than \$13,000 in revenue per vehicle. Combined, the profits generated from selling an EV as well as revenue from vehicle service, charging and subscription services, can generate more than \$28,000 in customer value per vehicle – nearly \$200,000 in customer lifetime value for brands able to keep customers coming back when ready to buy or lease again.

Figure 7: Customer Value per New EV and Lifetime

Retail Gross Profit Per New Vehicle ⁹ (Includes F&I)	\$3,790.00
Average Annual Maintenance/Repair Cost ¹⁰ (.077 cents per mile at 15,000 annually for 8.4 years)	\$9,702.00
Estimated EV Charging Revenue ¹¹ (Per vehicle)	\$1,800.00
Average Annual Subscription Services Cost ¹² (\$135 per month for 8.4 years)	\$13,635.00
Advertising Cost Per New Vehicle Sold ¹³ (Mass brand)	(\$602.00)
Total Net Customer Value Per New EV	\$28,325.00
Total Net Lifetime Customer Value	\$192,327.00

Source: Acxiom analysis

CONCLUSION

The migration from vehicles powered by fossil fuels to vehicles powered by electricity has begun, and while the adoption of EVs will be a years-long process, that future is here and the tipping point is now. As EV market share in the U.S. grows as more affordable models become available, competition among brands will increase. It's important for automotive marketers and retailers to engage people now wherever they fall on the EV adoption bell curve and wherever they are in their personal journeys to EV adoption. The stakes are just too high to not do so.

Complexity surrounds understanding people, where they are in their journeys and engaging them in personal ways through the media channels they prefer (e.g., younger buyers via social media, etc.) and with messaging that speaks to some of the factors that may influence decisions to buy an EV. The better ability automotive storytellers have to create engagement that takes into account which demographic people fall into, the media channels they prefer and the core objectives of campaigns targeting those people (e.g., conquest, win share, or educate) the better chance those marketers and retailers have in winning the hearts and minds of people thinking about buying an EV. Moreover, success can also result in unlocking new areas of revenue generation unique to EVs and result in significant contributions in customer lifetime value.

Certainly, accomplishing personalization at scale is hard, but it's far from impossible. Innovations in data, identity and technologies like CDPs are allowing the implementation of integrated marketing systems that can create real-time personalization while also lowering media spend and increasing attribution and measurement.

⁹ "NADA sees record profits for dealers" *Automotive News* January 3, 2022.

¹⁰ "Your Driving Costs 2021" *American Automobile Association (AAA)* August 2021.

¹¹ *Rivian Automotive, Inc. S-1 Securities and Exchange Commission (SEC)* October 1, 2021.

¹² "Car buyers balk at monthly fees for add-on features" *Axios* May 2, 2022.

¹³ "2021 Franchised Dealer Financial Profile" *NADA* 2021.

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