

*AI and the opportunity for*

# **Automotive Marketplaces.**

*A talk and an AI build, in parallel.*

ALASTAIR CAMPBELL

MarketCheck Cars Inc.

May 2026

01 / 18

AGENDA

# Three parts.

*A.I. is still in its infancy but it will change Marketplaces.*

## 01

### The disruption

A working product built in minutes.  
By the end you'll see what it produced.

## 02

### The data

The numbers on AI velocity, demand, and the economic stakes for marketplaces.

## 03

### The precedent

What history could tell us about navigating this shape of disruption.

MARKETCHECK

# MarketCheck, in one slide.

Automotive data across the USA, UK and Canada.

**3.5B**

**vehicle listings**

since 2016

**84.5K**

**dealership websites**

tracked daily

**272M**

**as-built live vehicles**

VIN-level identity

**98%**

**VINs sold at retail**

covered

THE STACK

**Real-time ingestion**

*Every vehicle, every day.*

**Validation**

*neoVIN™ — VIN-level identity.*

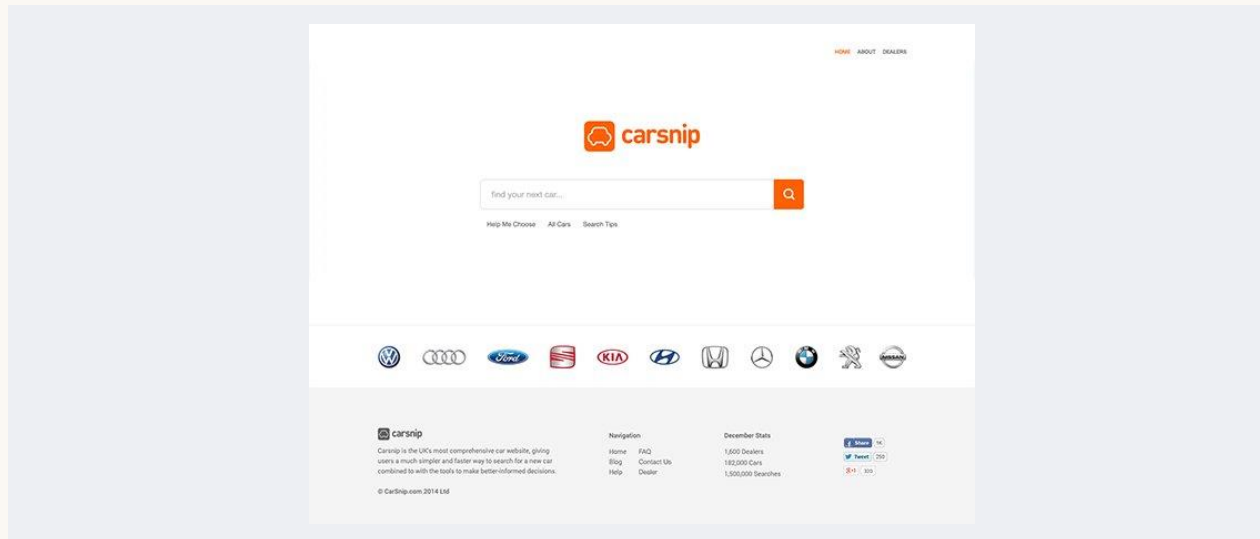
**Products**

*AskAuto, Price™, MarketMatch™, 360°.*

CARSNIP · 2016

# Carsnip, 2016.

*Same business, very different cost of building it.*



THEN

# £3m

Invested. Team of 30. Years of work.

TODAY

# Claude Code.

*Little cash outlay. Hours of work. One person and an LLM.*

AI IS WRITING THE CODE NOW

# AI is writing the code now.

40%

**of all public GitHub commits are now written by Claude Code alone.**

DOUBLED IN A SINGLE MONTH.

*Actual AI-assisted code is closer to 30–40%. The visible curve is a fraction of the real one.*

Source: SemiAnalysis · Feb 2026

WHERE USERS START

# Where users start is changing.

12x

## AI-driven referral traffic to retail sites.

*“Assume there's no search. You have to have your business planned as if search is zero.”*

Roger Lynch, CEO, Condé Nast · May 2026

July 2024 → February 2025

ORGANIC SEARCH

## Dropped 9% in 2025.

Adobe Digital Insights · 2026

FASTEST-GROWING REFERRAL

## AI is now #1.

Contentsquare · 2026

BY 2030

**Forty million journeys.**

**40M**

**AI-influenced car-buying journeys per year.**

US figure. Assume Europe scales similarly. · Source: BCG / OpenAI · May 2026

AND EVERYONE IS

# And everyone is building.

*Funded startups going directly for the dealer wallet or the consumer moment.*

## VOICE + AUTOMATION

Flai · YC '25 · \$4.5M

Toma · 9K appts / 90d

Mia Labs · \$20M Series A

## CONVERSATIONAL AI

Numa · phone agent

Brooke.ai · receptionist

Drivee AI · chat agent

## LEAD ENGAGEMENT

Matador AI · 1,500+ dealers

BDC.AI · autonomous BDC

Bitesize · reactivation

## VALUATION + VISIBILITY

Brego (UK) · valuations

Ekho GEO · AI search

Fullpath · \$50M raised

## CONSUMER AI SEARCH

Coches.net · ChatGPT app

SumAuto · WhatsApp

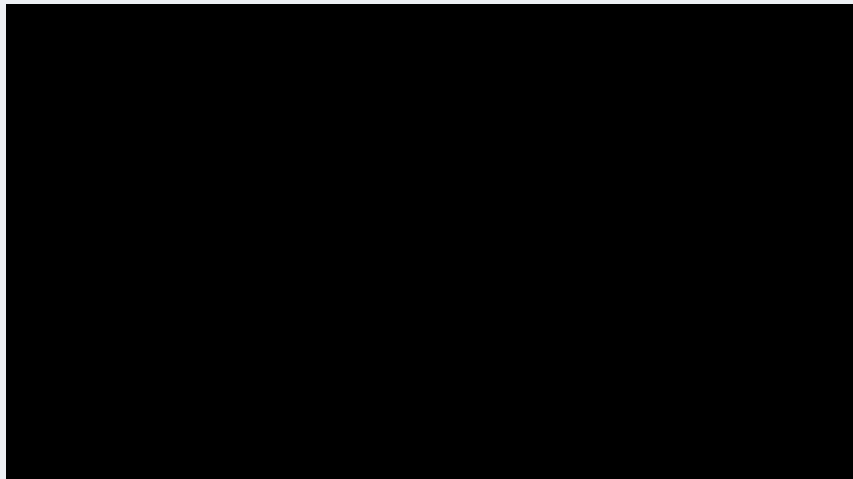
40+ more in production

*"Most of these companies are coming after a share of dealer wallet. Those that can replace your leads, will."*

BUILT IN ONE DAY

# Anyone can ship.

*A fully autonomous video-ad tool, built in 2 days. 33,000 lines of code.*



## THE TECH STACK

### Frontend

Next.js + React + TS, Tailwind, shadcn/ui

### Backend

Supabase (Postgres, Auth), AWS S3

### AI / media

OpenAI, ElevenLabs, NeoVIN, Remotion

### Infra

AWS Amplify, Lambda, Supabase Edge

*Pennies per video ad. Voiceover in the local language. Available to any dealer in any market today.*

A SEVEN-WEEK JOURNEY

# You own one stop on a seven-week journey.

4

**car-search websites**

*visited per buyer.*

Average UK buyer, 2025.

48

**days spent**

*deciding.*

Seven weeks. You see one of them.

Source: 2025 Motors Digital Touchpoints Survey

EVERYWHERE ELSE

# Leaking to a thousand places at once.

*Not to a competing marketplace. To everywhere else.*

LARGE PLATFORMS MOVING IN

- |            |                |                 |
|------------|----------------|-----------------|
| ChatGPT    | Claude         | Gemini          |
| Perplexity | Google AI Mode | Atlas / agentic |

SMALL BUILDERS MOVING IN

- |              |                  |                    |
|--------------|------------------|--------------------|
| Voice agents | WhatsApp bots    | Vertical AI search |
| Custom GPTs  | TikTok / YouTube | Affiliate AI sites |

*Every week another builder is in your dealers' inboxes. Cumulatively, it adds up.*

Where to focus?

# Three options. None obviously wrong.

*All three are visible today. They cannot all win.*

YOU OWN TODAY

DEALER RELATIONSHIPS AND BRAND TRUST

**01**

## Build your own

CarGurus Discover

Own UI and data end-to-end. Defensible product.  
But you build alone, and the consumer must come to you.

**02**

## Partner with a platform

OLX and others × OpenAI

Distribution at the speed of ChatGPT. But the user relationship sits with the platform, not the marketplace.

**03**

## Or...open the interface

Agent-readable layer

Every agent queries you. Default plumbing for the category. Trade exclusivity for ubiquity.

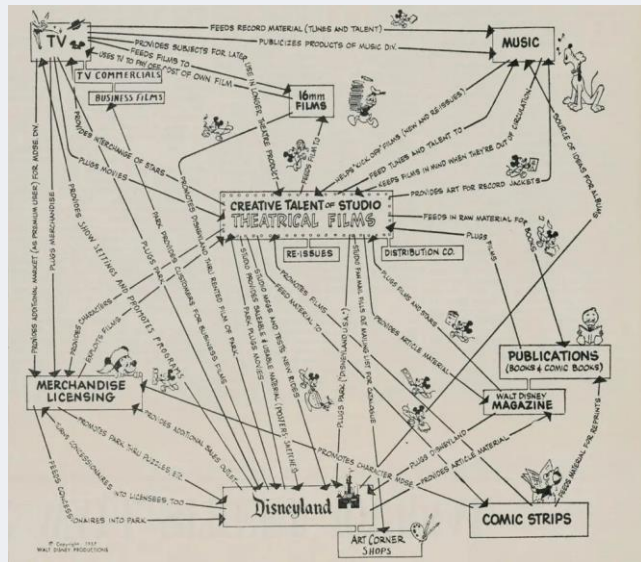
*"LLMs power the intelligence, but the edge comes from domain-specific data."*

Anabella Guimarey, El Cero Km · BCG / OpenAI · May 2026

WALT DISNEY, 1957

# Distributed channels. Centralised value.

Disney drew this in 1957. Every studio that didn't think this way is gone.



THE DIAGRAM

TV, music, films, parks, merchandise, comics. All separate businesses, all feeding each other.

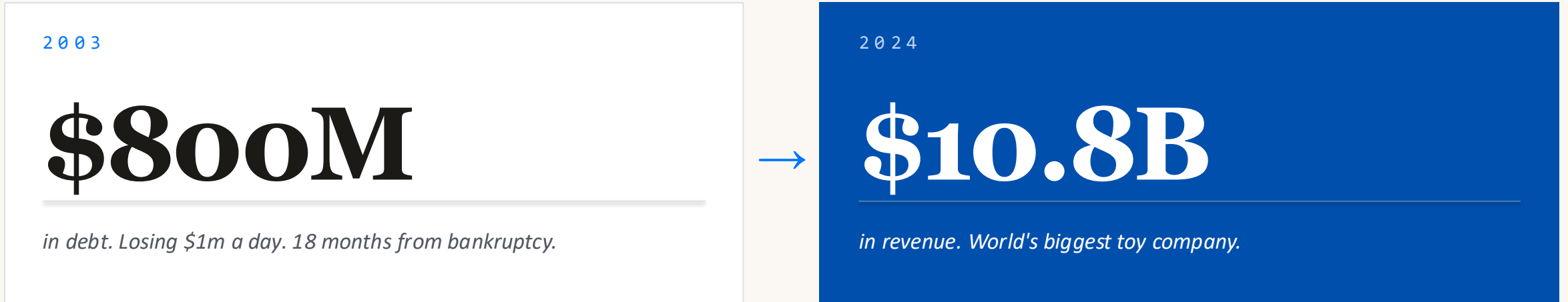
DISNEY MARKET CAP, 2026

# \$200B

LEGO

# Lego, when the model was under attack.

*Mega Bloks undercut them. Video games stole kids' attention. Sound familiar?*



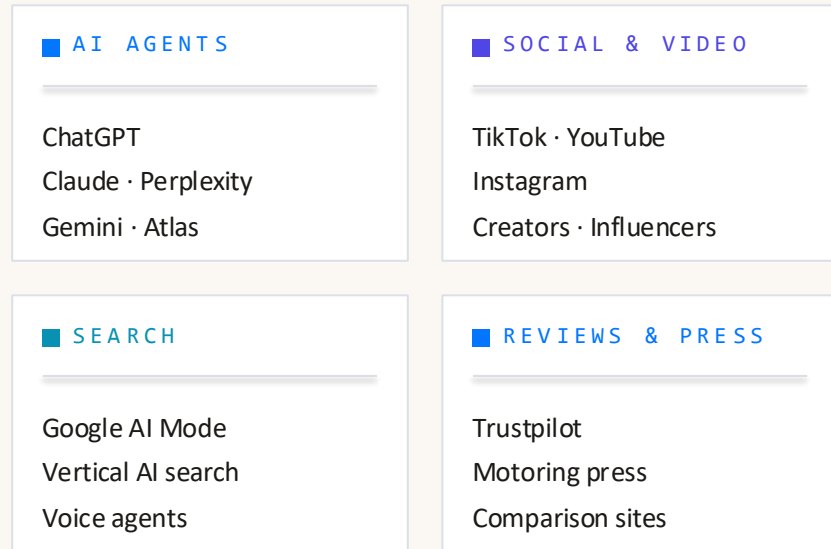
***They didn't fight the disruptors. They absorbed them.***

DISTRIBUTED CHANNELS, CENTRALISED VALUE

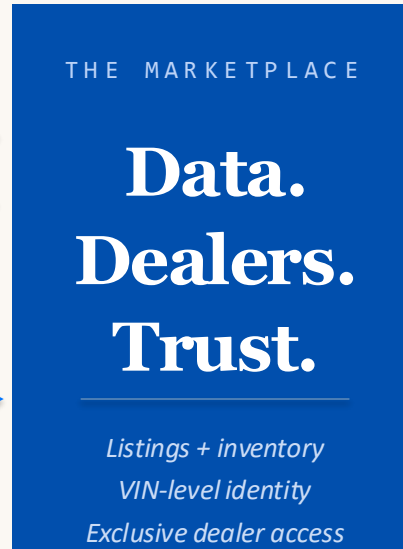
# The same shape, applied to marketplaces.

Open the data. Route the leads. Share the revenue. Keep the centre.

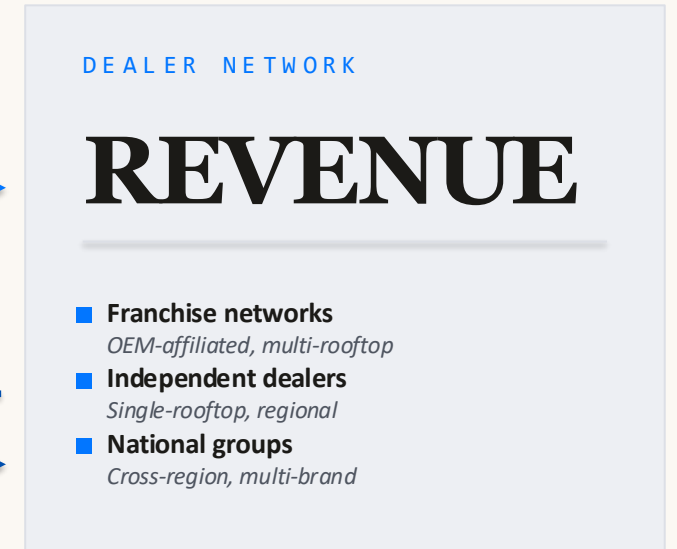
CHANNELS · WHERE CONSUMERS ARE



THE CENTRE



DEALERS · WHERE IT TRANSACTS



DATA + TOOLS  
REVENUE SHARE

LEADS  
ATTRIBUTION

QUALIFIED  
LEADS

INCOME  
LOYALTY

## DIFFERENT MATHS

# The incumbent and the challenger don't face the same maths.

## THE INCUMBENT'S DILEMMA

*Why opening up is hard for #1.*

- Every open interface risks cannibalising first-party traffic.
- Dealer relationships built over decades are at stake.
- Boards measure protected margin, not future optionality.
- The defensive bet is the rational bet for #1.

## THE CHALLENGER'S OPENING

*Why the maths flips at #2.*

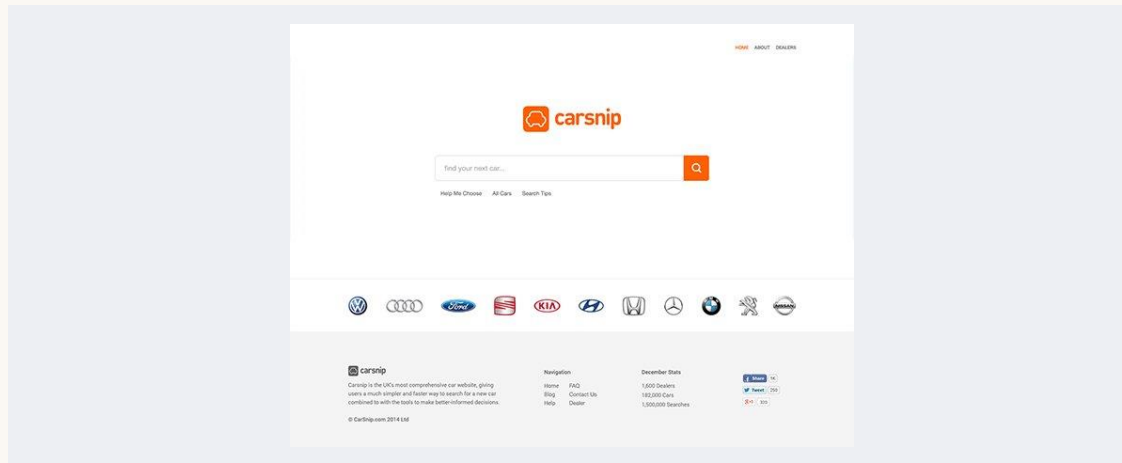
- Less first-party share to protect, more to gain.
- Distribution beats first-party reach when reach is small.
- Becoming default plumbing locks in the next generation.
- The offensive bet is the rational bet for #2.

*"We'll be careful about how much data we share." · AutoTrader UK · H1 2026*

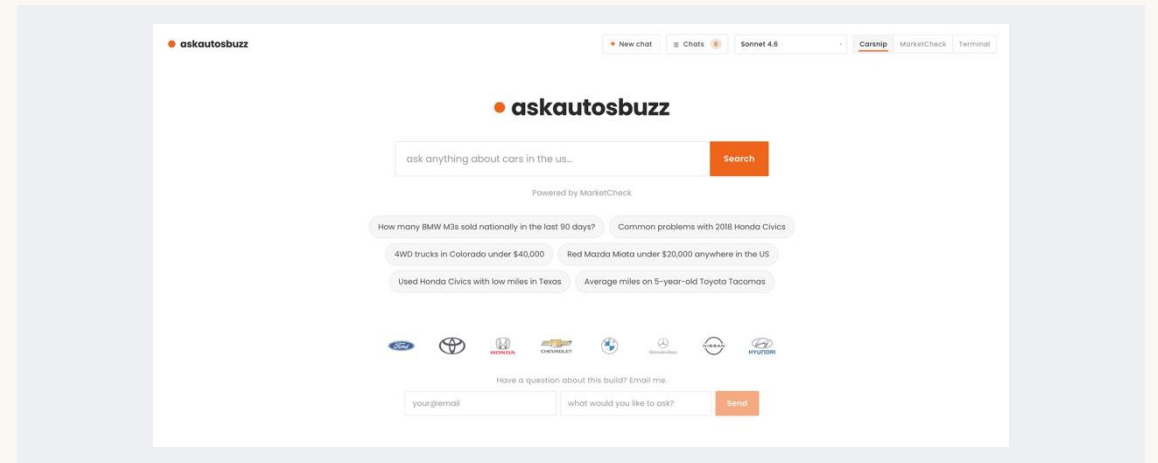
FROM £3.89M TO AN AFTERNOON

# £3.89m, ten years ago. An afternoon, today.

CARSNIP · 2016



ASKAUTOSBUZZ · 2026



*The question isn't whether someone builds the future.  
It's whether you build it.*

TRY IT YOURSELF

# Try it yourself.

OPEN THE BUILD

[askautosbuzz.com](https://askautosbuzz.com)

username

your email

password

autosbuzz2026



*Expert table 5 later this afternoon. Come and talk through how AI is changing our businesses.*