



NFDA

NATIONAL FRANCHISED DEALERS ASSOCIATION

Consumer Attitude Survey 2019



Public Knowledge
Delivering Quality Insights

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INTRODUCTION

The National Franchised Dealers Association (NFDA) is pleased to present the findings of the Consumer Attitude Survey 2019. The structure of the survey has been redesigned to include more questions and participants and provide a more detailed insight into consumers' perceptions of franchised retailers, independent garages and non-franchised national chains amongst car owners.

This is the seventh issue of the survey. The study, executed by Public Knowledge, polled 2,000 consumers across the UK in a 15-minute online survey.

The survey is undertaken with five major objectives:

- Explore current market perceptions of franchised dealers and their competitors
- Understand current consumer aftersales behaviour
- Examine factors influencing consumer aftersales decision making
- Determine consumer opinions of the aftersales offering at franchised dealerships
- Assess awareness and understanding of the franchised dealership aftersales offering

This report is a summary of the survey and includes an overview of general consumer perceptions in the aftersales sector with a focus on a number of specific areas.

Overall, it is encouraging that satisfaction levels with the service provided by franchised dealers are high for the majority of the respondents. Additionally, consumers continue to see franchised dealerships as the safest and most trusted places for aftersales care.

The results of the survey are analysed to help franchised retailers understand and, where necessary, improve their performance in the aftersales sector.

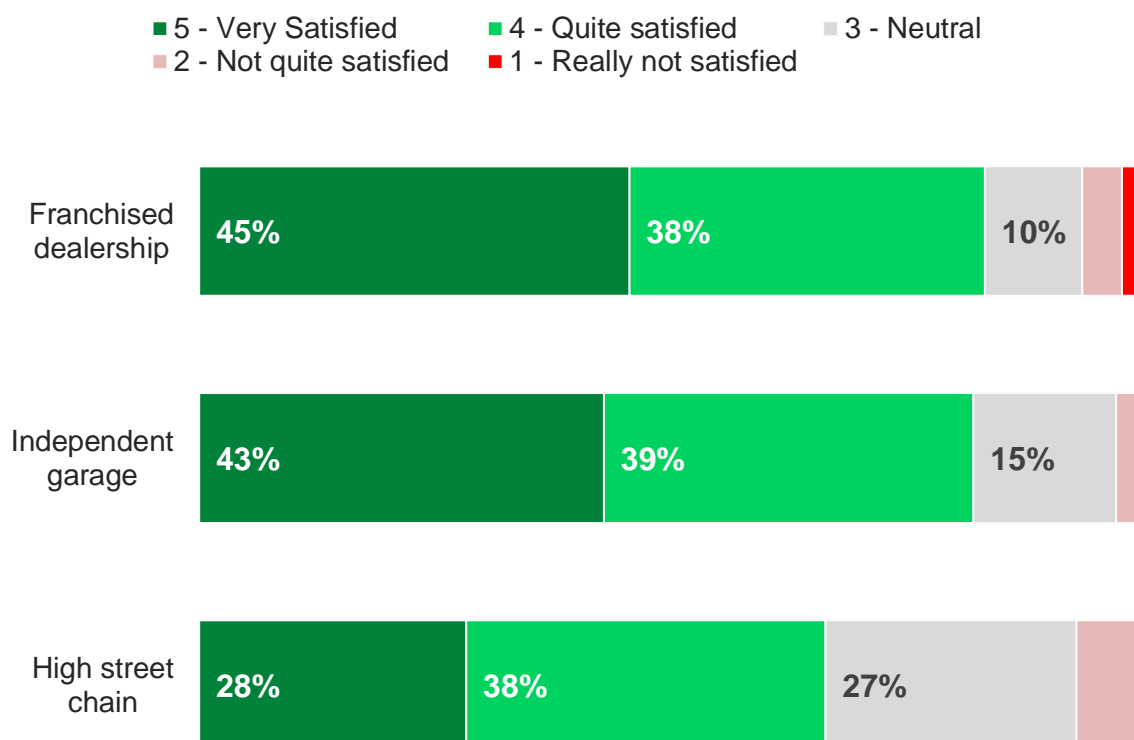
Sue Robinson

Director, National Franchised Dealers Association



SATISFACTION LEVELS

Thinking about your last experience at the following, please indicate on a scale of 1-5, where 1 is not very satisfied and 5 is very satisfied, how satisfied you were with your overall experience.



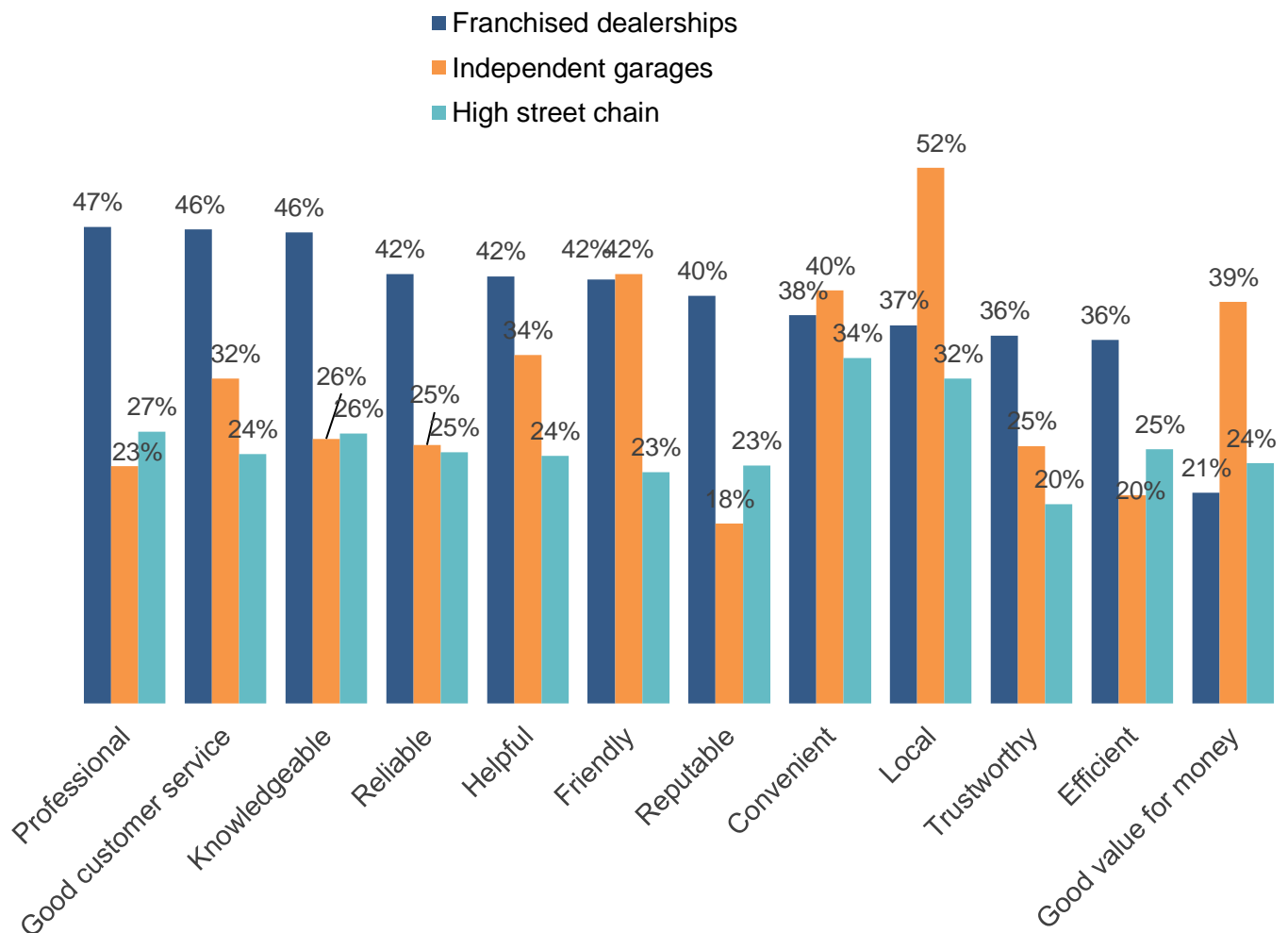
Satisfaction with franchised dealers has increased wave-on-wave and is now higher than that for independent garages. 83% of consumers said they were either satisfied or very satisfied with their experience at a franchised dealership. In summer 2018, the percentage of satisfied respondents was 78%, while one year ago, satisfaction levels were at 77%.

“We are delighted with the continued improvement in customer satisfaction with the service provided by franchised dealers highlighted in the latest Consumer Attitude Survey. As a body of dealers, we have continued to invest in researching what our customers think of the service we give. This evidence enables us to take consumer feedback and work as a group on continued improvements to our delivery of service to our customers, helping to differentiate ourselves in the market”

Richard Roberts, Chairman of the NFDA National Aftersales Working Group

GENERAL PERCEPTIONS

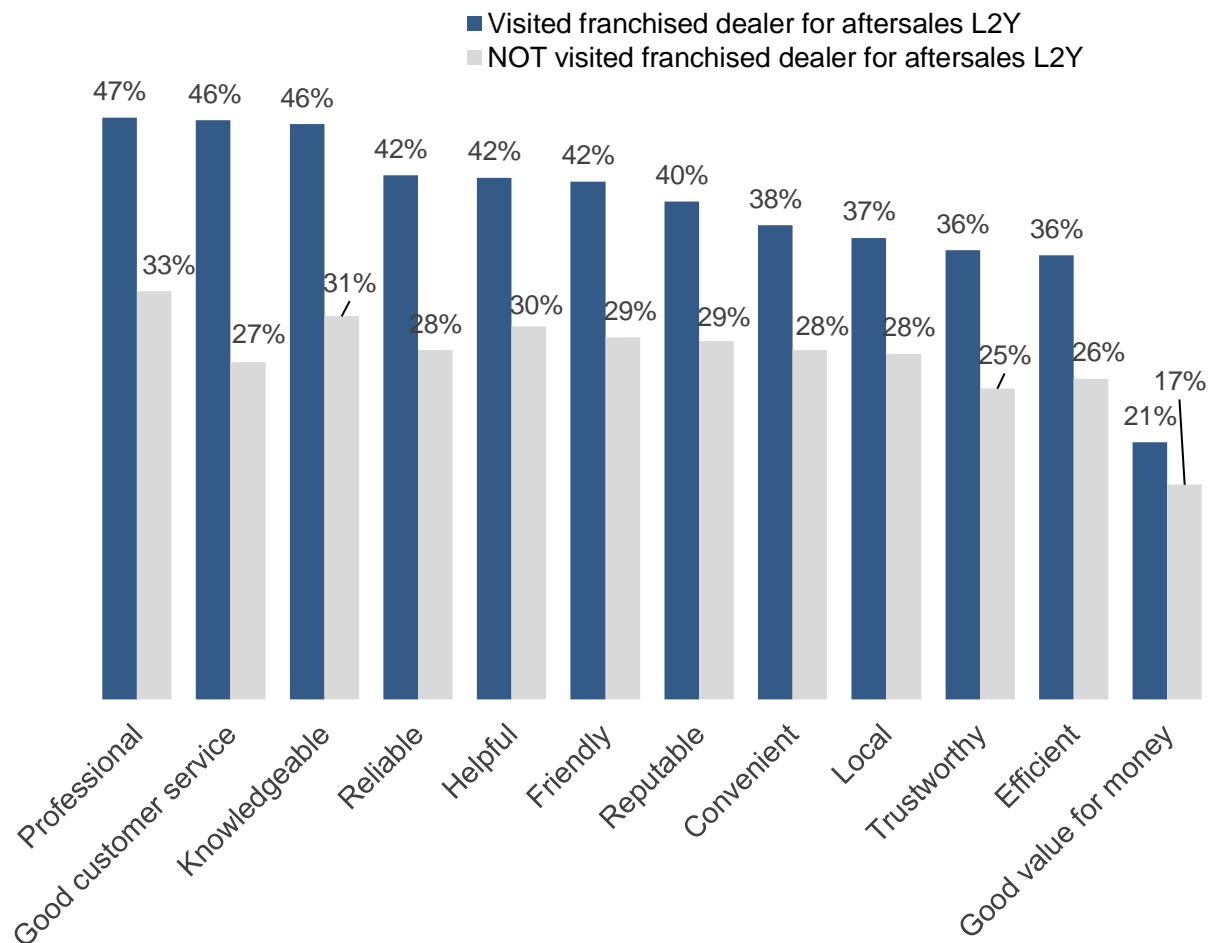
Which of the following words/phrases would you use to describe the following companies?



Franchised dealerships are principally associated with **professionalism**, **good customer service**, and strong **knowledge** of aftersales and the consumers' vehicles.

Independent garages are most likely to be viewed as local, friendly, convenient, and offering good value, whilst high street chains tend to be viewed as convenient and local.

Which of the following words/phrases would you use to describe the following companies?



Those who have used a franchised dealer for aftersales care in the last two years are significantly more likely to associate them with positive attributes. The differential is highest for perceptions of good customer service.

TRUST

For the vehicle engines shown below, which of the following companies would you trust the most to carry out a service?

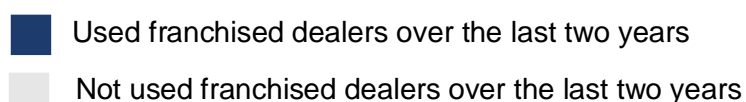
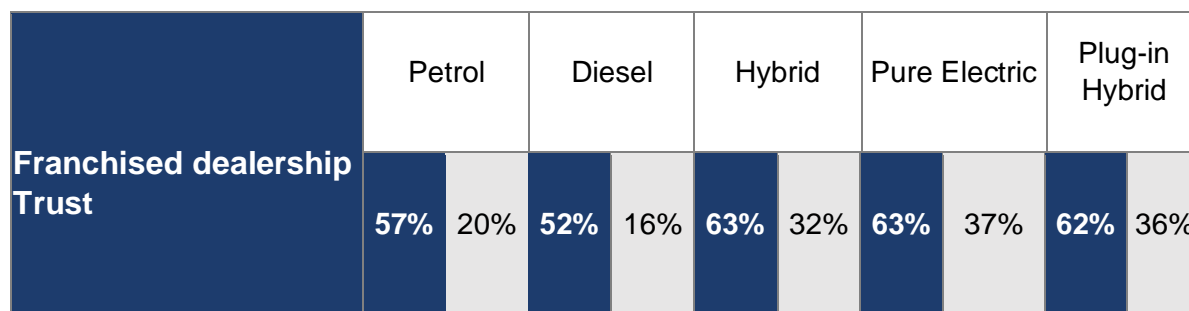
	Petrol	Diesel	Hybrid	Pure Electric	Plug in Hybrid
Franchised dealership	48%	43%	55%	56%	55%
Independent garage	33%	29%	11%	9%	9%
High street national chain	7%	9%	6%	6%	6%
Don't know	12%	19%	28%	29%	30%

Franchised dealers are the **'most trusted'** for servicing all engine types. Levels of trust rise significantly for hybrid, pure electric and plug-in hybrid cars. Notably, for these three categories, nearly one in three consumers responded they **'don't know'**.

"I am pleased to see that franchised dealerships are the most trusted place for aftersales service. The higher levels of trust from those who visited a franchised dealer over the last two years demonstrate the quality of the service we provide. We make significant investments to meet the fast-evolving consumer demand and our strong performance in the alternative fuel vehicles sector is a result of this".

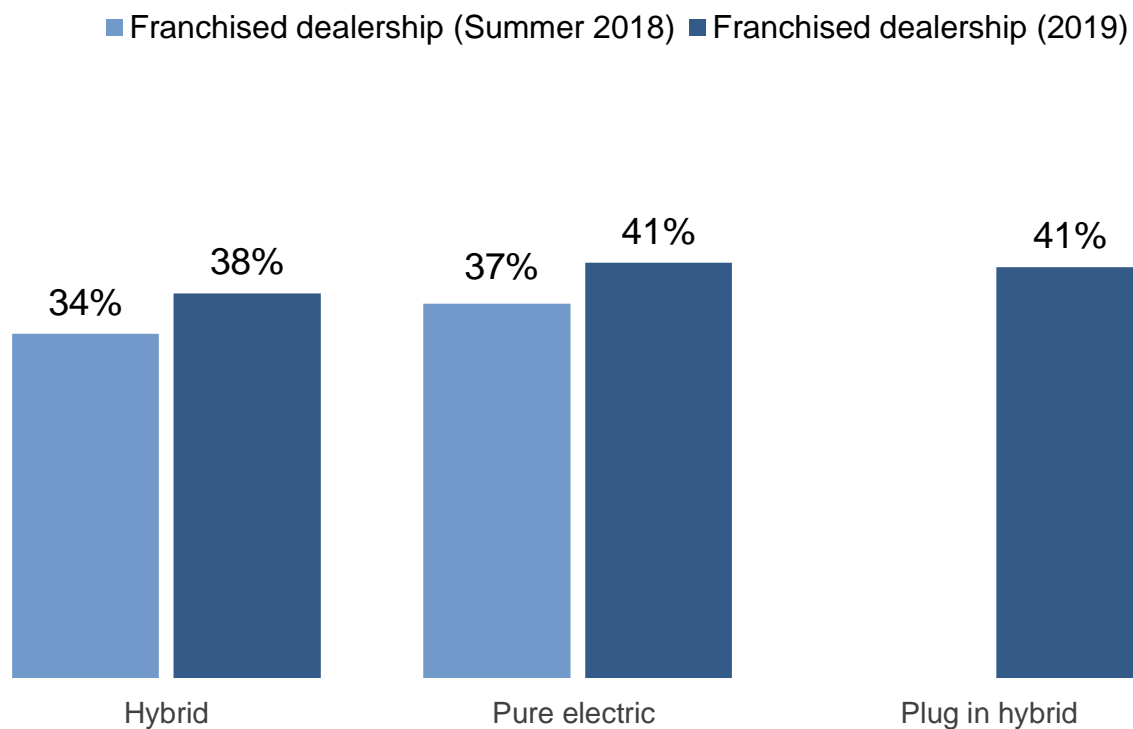
Andy Bruce, CEO of Lookers

Recent usage of franchised dealerships substantially boosts trust.



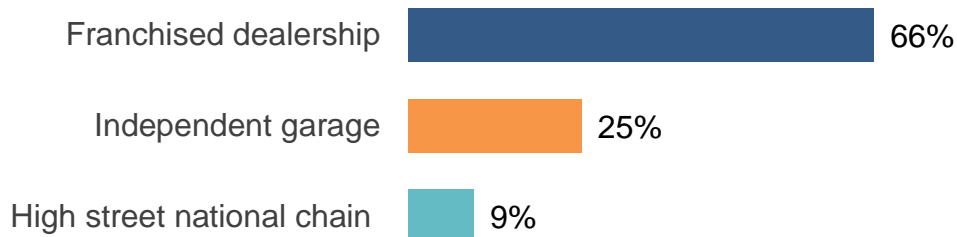
Significantly high percentages of those who say they do not use franchised dealers for aftersales care would nevertheless trust them the most for hybrid and pure electric cars.

Proportion who trust franchised dealers most among those who always use independent or high street national chains.



SAFETY

From a safety viewpoint, which of the following companies do you think it would be safest to get your car serviced by?



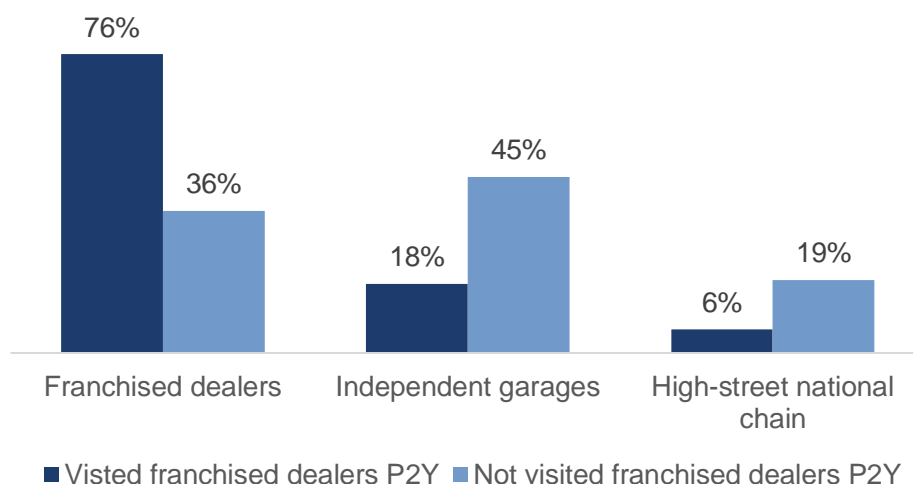
Two thirds of respondents consider franchised dealers the safest place for car servicing.

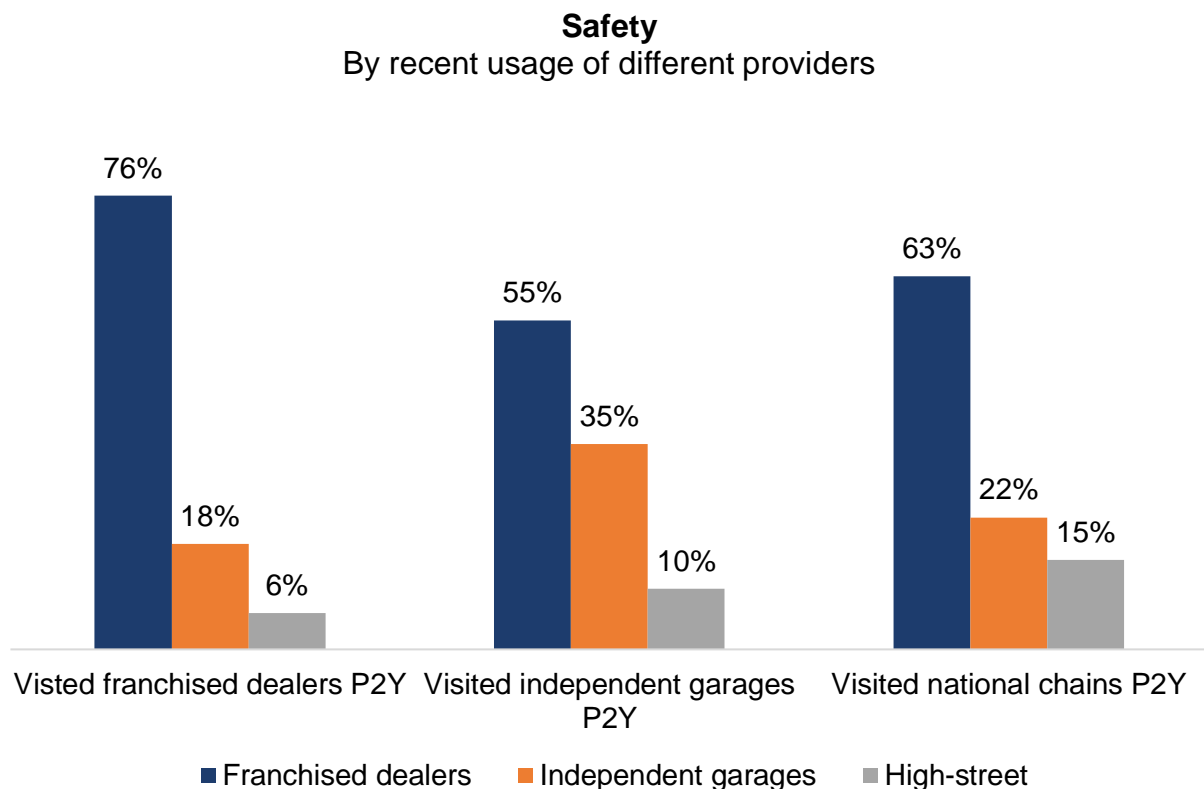
Aligning with usage, those who feel franchised dealers are safest are more likely to be older drivers and drivers of newer cars. However, there is no difference according to whether the brand is volume or prestige.

Perceptions of safety provided by franchised dealers are driven by an association with **relevant technical equipment (74%)** and **specialist expertise (64%)**.

Usage of franchised dealers in the aftersales sector boosts perceptions of safety significantly.

Perceptions of safety by franchised dealer users





Franchised dealers are seen as the safest provider of aftersales care also by those who have visited an independent garage or a high-street national chain in the past two years.

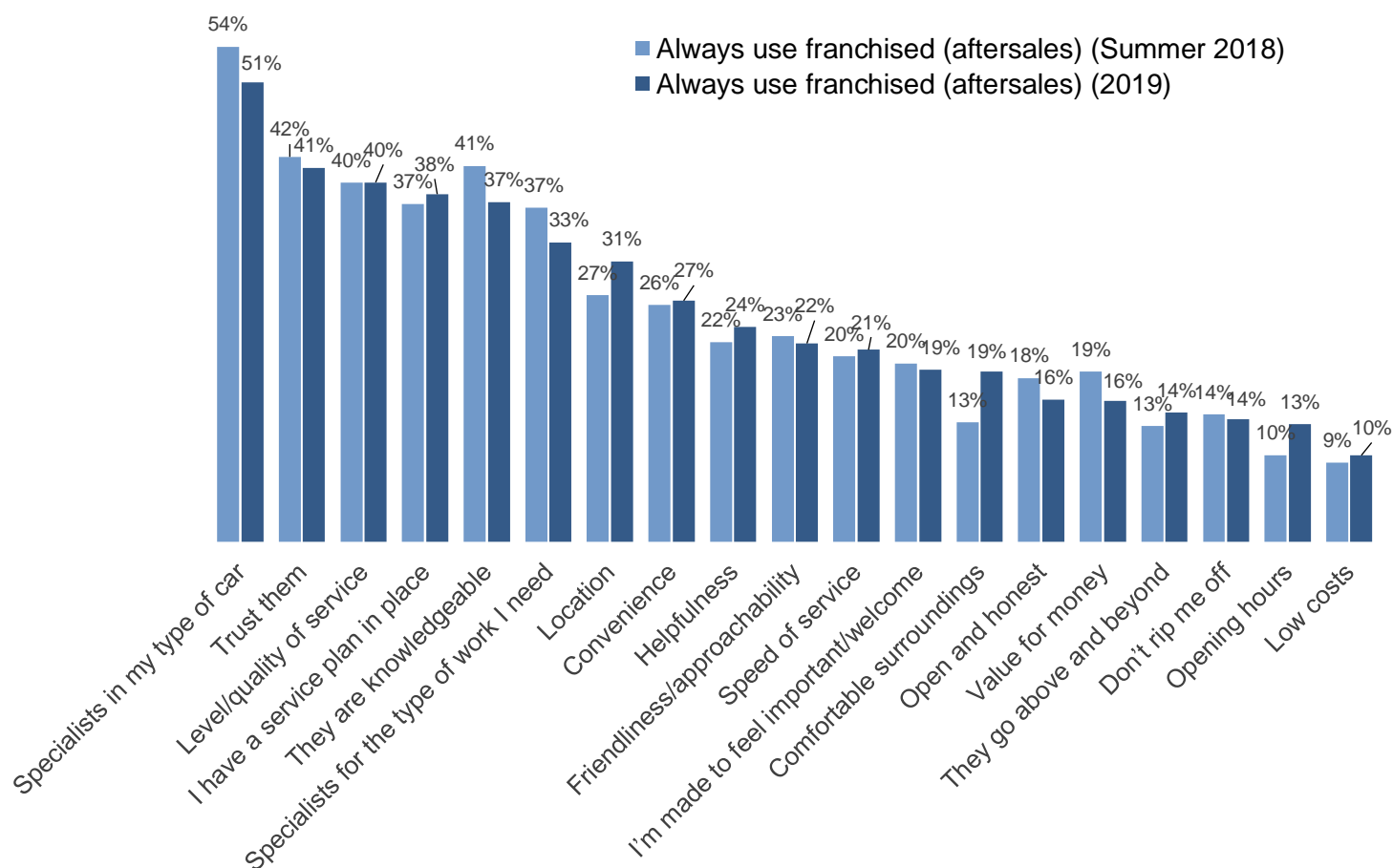
In particular, 55% of those who have visited independent garages in the past two years and 63% of those who have visited high-street national chains feel franchised dealers are the safest.

“It is encouraging that the majority of UK motorists see franchised dealerships as the safest place for car servicing. We invest heavily in technical equipment and specialist training to ensure the highest standards of safety. The findings of the survey are testament to the efforts franchised retailers have been making to provide our customers with the best possible experience”.

Daksh Gupta, CEO of Marshall Motor Group

WHY CONSUMERS CHOOSE FRANCHISED DEALERS?

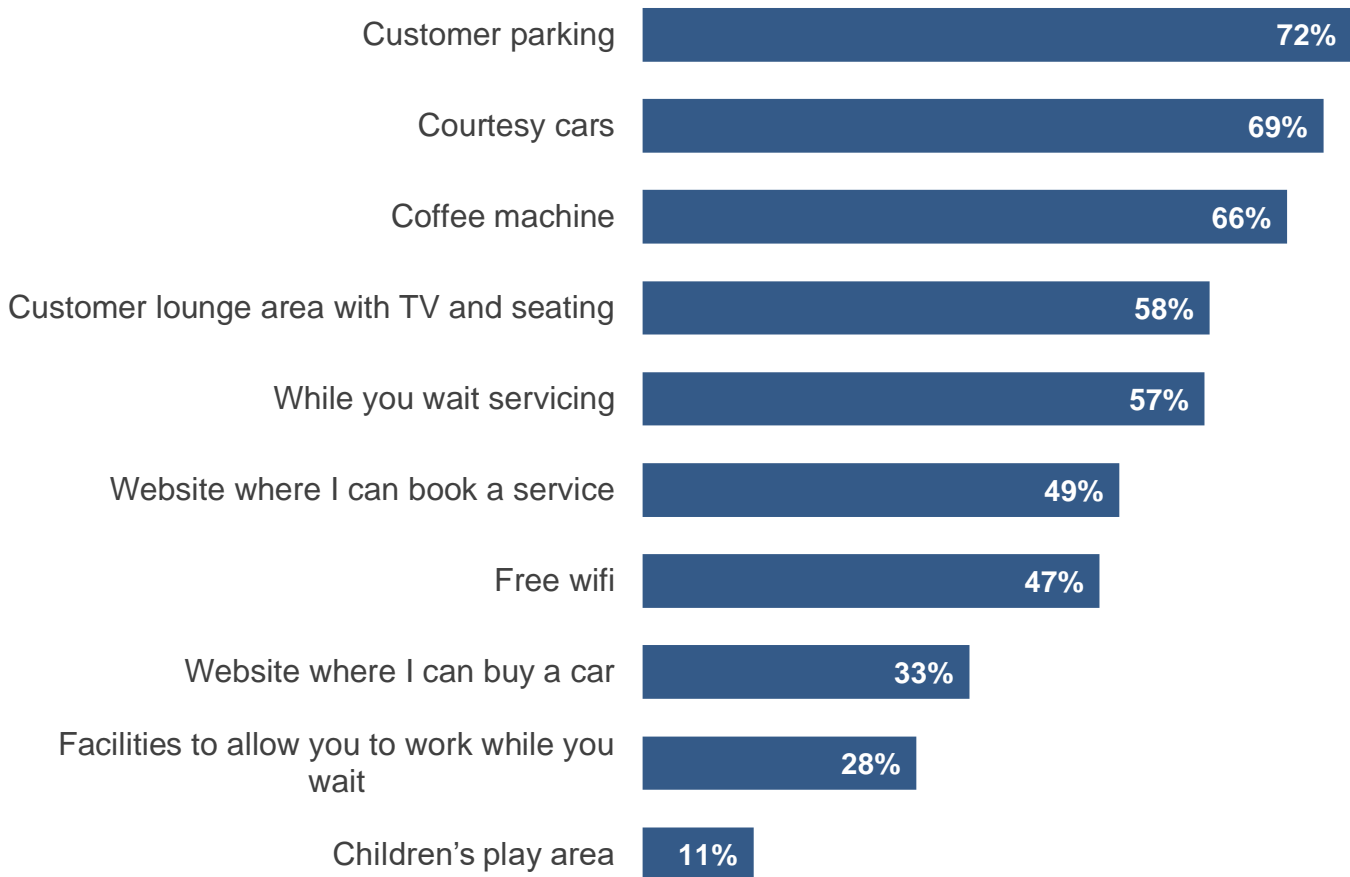
You tell us you use franchised dealer as your main provider of aftersales car care services. Why do you use them over other service providers available? What are the benefits to you?



Loyalty to franchised dealerships for aftersales care is driven primarily by their **specialist knowledge, quality of service**, and the **trust** that this supports.

Specialisation is the key driver differentiating franchised dealers.

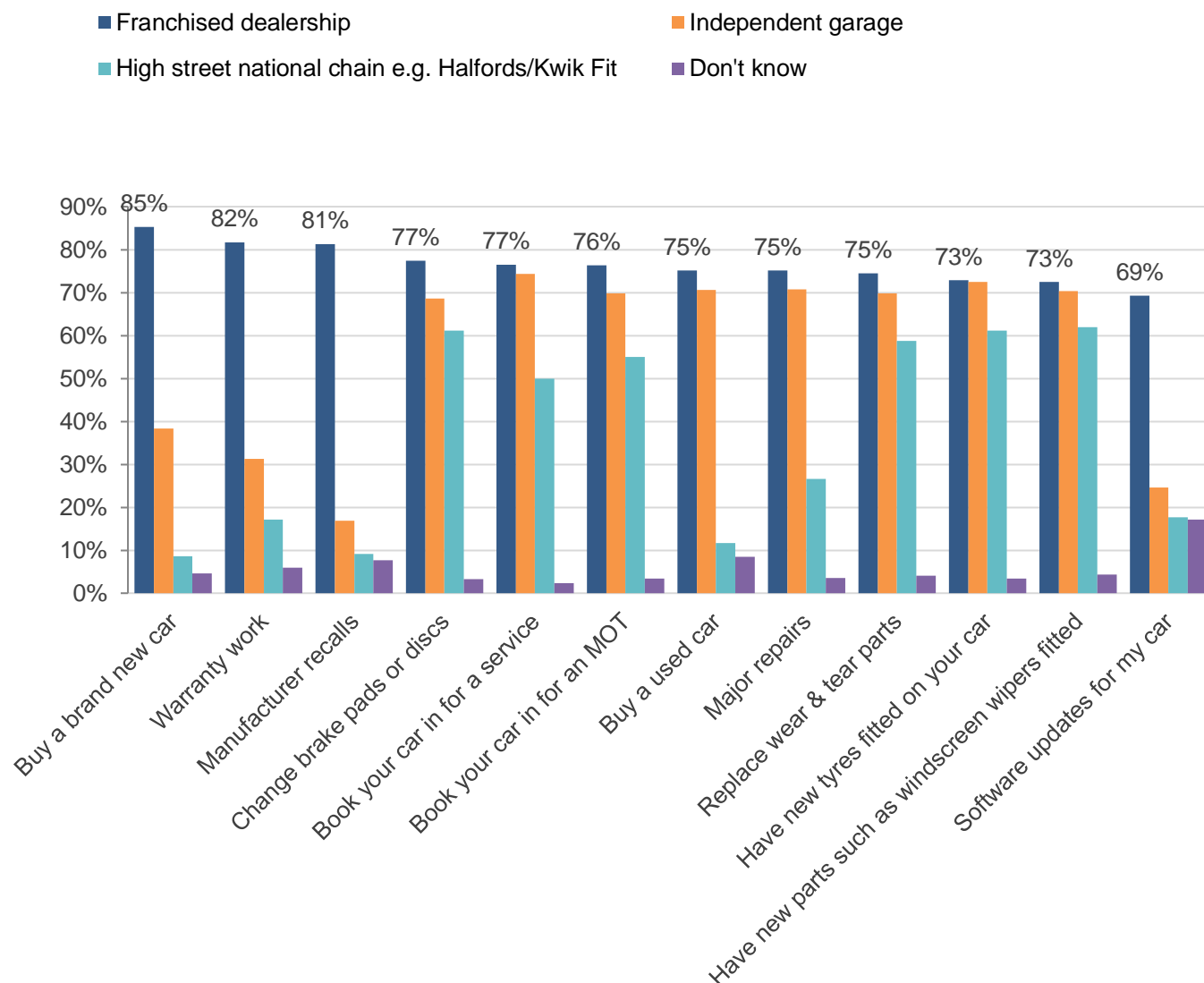
What facilities do you expect a franchised dealer to have?



Customer parking, courtesy cars, a comfortable waiting area, and while you wait servicing are expected by the majority of the market at a franchised dealership. Volume brand drivers generally have higher expectations than drivers of prestige brands.

AWARENESS OF OFFERING

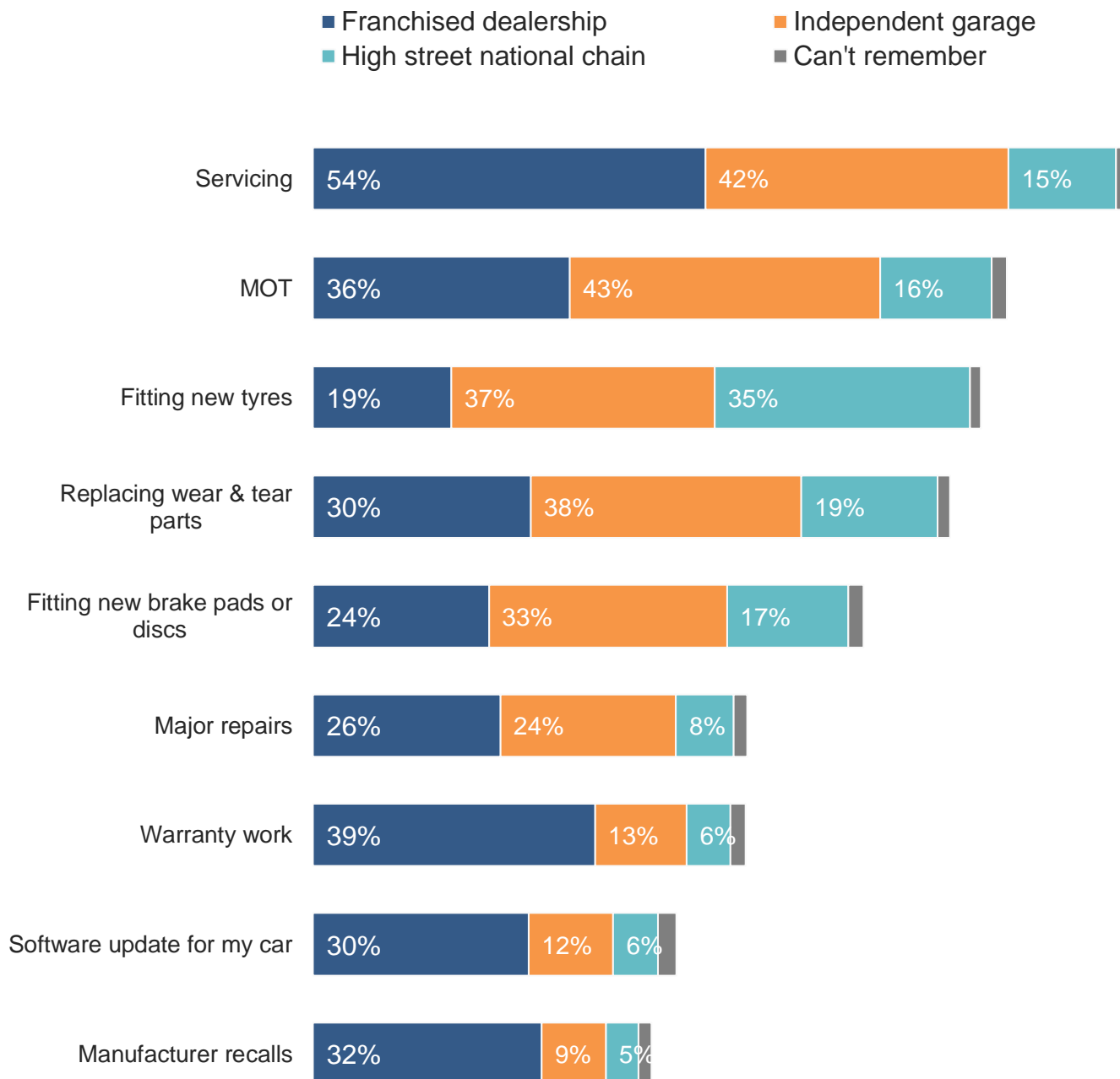
At which of the following companies do you think that you could get the following services?



In relation to other aftersales care providers, franchised dealers are more associated with offering a wide array of aftersales services.

Franchised dealers continue to score well **for buying a brand new car, warranty work and manufacturer recalls.**

Within the past two years, where have you visited for the following...?



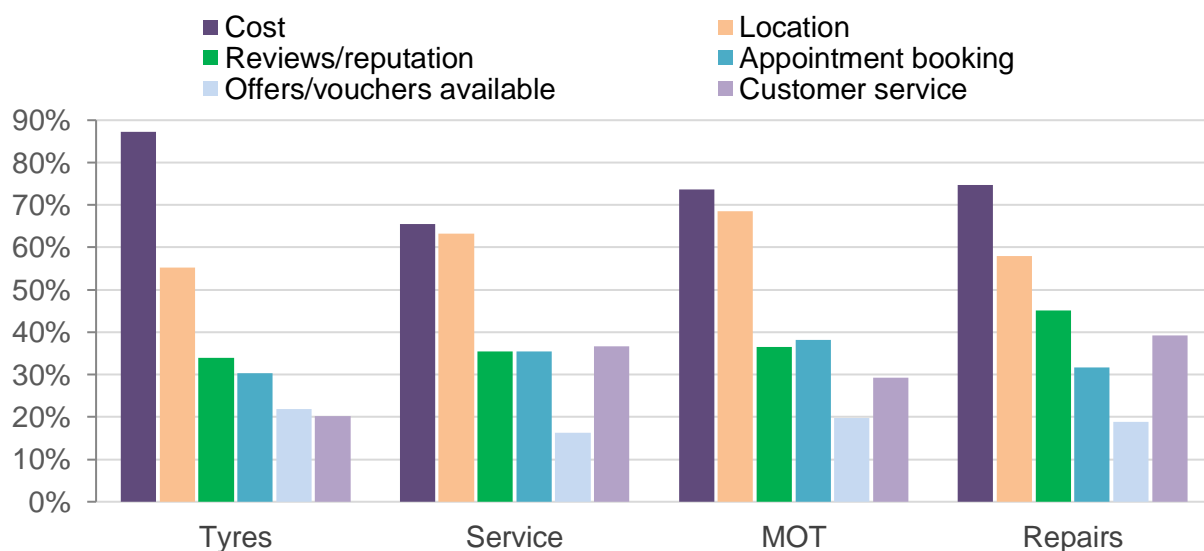
Aside from warranty work, franchised dealers are most likely to be used for servicing and MOTs.

SERVICE BOOKING

Which of the methods below is your one preferred way to book your car in for the following?

	MOT	Service	Repairs	Tyres
Phone	51%	54%	58%	41%
Internet	32%	31%	24%	28%
In person before the day	12%	12%	14%	17%
In person on the day	2%	2%	3%	13%
Other	4%	1%	1%	1%

What have you researched online?

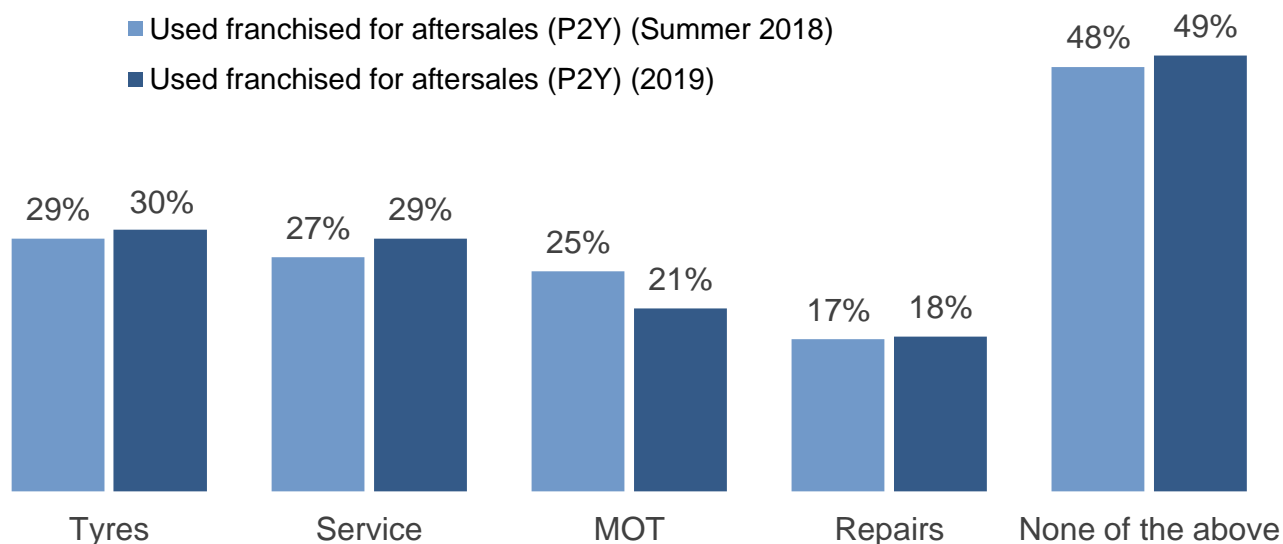


Reputation is most important when researching repairs and tyres are the most cost-sensitive purchase. In fact, location is less important when researching tyre renewal, this suggests that people could be willing to travel further to get a good price for tyres.

INTERNET RESEARCH

In the past, have you used the internet to research any of the following for your car?

Services for which internet research was used



Internet research has remained broadly stable year-on-year. However, among this year's respondents, a significantly lower proportion of those using franchised dealers for aftersales care have used the internet to research MOTs. Those who use independent garages or high street chains for aftersales servicing are more likely to shop around on the internet.

CONCLUSION

The seventh issue of the NFDA Consumer Attitude Survey has revealed a number of interesting insights into the behaviour and perceptions of UK motorists in the aftersales sector.

Notably, customer satisfaction levels have risen, and it is encouraging to see that satisfaction is now higher with franchised dealers than with independent garages.

Franchised dealers continue to be seen by the vast majority of consumers as professional, knowledgeable and able to provide good customer service. Positively, there has been an increase in the number of consumers viewing franchised dealerships as helpful, friendly and local. The fact that usage of franchised dealers encourages consumers to associate them with positive attributes demonstrates the high quality of their services.

Franchised dealers continue to be the most trusted for servicing all engine types. The level of trust for hybrid, pure electric and plug-in hybrid cars is a promising sign looking at the future of the market.

Safety remains a key element of the franchised dealers offering as two thirds of consumers see them as the safest in the aftersales area. The positive perceptions are primarily due to their technical equipment and specialist expertise.

Overall, the main reasons why consumers choose franchised dealers for aftersales care are their professionalism, trustworthiness and quality of service. As part of their experience, the vast majority of consumers expect franchised dealers to have customer parking and to offer courtesy cars.

In terms of consumers' familiarity with the different services offered, a larger proportion of consumers now associate franchised dealers with low value works such as fitting new tyres or windscreen wipers. Interestingly, the use of the internet to research aftersales services has remained stable.

The Consumer Attitude Survey is carried out to provide franchised retailers with an in-depth understanding of consumers' perceptions in the aftersales sector. The findings of the survey give franchised dealers the opportunity to address any potential issues and continue to improve their offering.

The National Franchised Dealers Association (NFDA) represents franchised car and commercial vehicle retailers in the UK

For more information, please visit: www.nfda-uk.co.uk

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