Online Auto Shoppers: Who Are They and How Do You Meet Their Needs?

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Table of Contents

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Online Auto Shoppers: Who Are They and How Do You Meet Their Needs?

The increased use of the Internet to market new and used cars and light trucks has also had a significant impact on automobile dealers. Through the Internet, consumers can easily access vehicle reviews; view pictures of vehicles; and compare models, features, and prices. Many Web sites allow consumers to research insurance, financing, leasing, and warranty options. As a result, consumers are generally better informed and spend less time meeting with salespersons. The Internet has clearly replaced the salesperson as the primary source of vehicle information.

—US Department of Labor, Bureau of Labor and Statistics[1]

Introduction

For more than a decade, J.D. Power and Associates has been tracking and analyzing the online habits and shopping behavior of new-vehicle buyers before they visit a dealership to purchase or lease a vehicle. As one would expect, the majority of those who purchase a new vehicle have access to the Internet—92%, according to the *J.D. Power and Associates 2011 Auto Offline Media Report℠—Winter.* While the average new-vehicle buyer spends 11.4 hours per week online for personal use, 22% spend more than 16 hours per week online. The fact that these buyers post on either online message boards, blogs, or forums indicates that new-vehicle buyers are very active online.

While 92% of new-vehicle buyers regularly use the Internet, 77% use it to help them in their vehicle-shopping process, according to data from the *J.D. Power and Associates/Compete, Inc. Web Site Performance Tool℠ (WSPT),* which tracks actual online behavior of new-vehicle buyers using Compete's panel of Internet users. This is corroborated by a finding in the *J.D. Power and Associates 2011 Auto Offline Media Report℠—Winter,* in which 76% of respondents say they use the Internet in their shopping process. While the frequency of consumers using the Internet to assist in vehicle shopping is highest during a period of a few weeks prior to the actual vehicle purchase, most Automotive Internet Users (or AIUs) start using the Internet months before they make a purchase. Even 6 months prior to purchase, more than half of AIUs have already started collecting information online to assist in their vehicle purchase decision.

While the majority of new-vehicle shoppers use the Internet to assist them in their search, far fewer use it to contact a dealer. Analysis of the *J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study℠* indicates that AIUs who use the Internet for automotive research are even less likely to submit an online lead than are AIUs who purchased a vehicle 5 years ago: in 2005, 32%[2] of AIUs submitted an online request, compared to 31% who did so in 2010.

"AIUs who use the Internet for automotive research are even less likely to submit an online lead than are AIUs who purchased a vehicle 5 years ago: in 2005, 32% of AIUs submitted an online request, compared to 31% who did so in 2010."

That is not to say there are fewer consumers submitting online requests to dealers—any growth in this area is due to the increase in the number of consumers shopping online for a vehicle, rather than the percentage of online shoppers who submit a request. It could be inferred that these savvy shoppers think they have accumulated enough knowledge from online resources to negotiate a deal without asking for a price quote or understand whether a particular vehicle has the specific features they are considering.

[1] *Career Guide to Industries, 2010-11 Edition: www.bls.gov/oco/cg/cginfo.htm#conditions*

[2] *J.D. Power and Associates 2005 New Autoshopper.com Study℠*

In the early days of automotive Internet shopping, many New Age pundits predicted the demise of the current franchise dealership system—consumers were not only going to shop for and collect vehicle data online, but also were going to complete the entire purchase process online, from beginning to end, without need of ever visiting a dealership. Although those predictions so far have turned out to be off the mark, dealers and manufacturers have changed the way they do business by adapting both online and offline to help meet the needs of these new types of shoppers. For the majority of shoppers, being able to "kick the tires" before buying a vehicle is still extremely important.

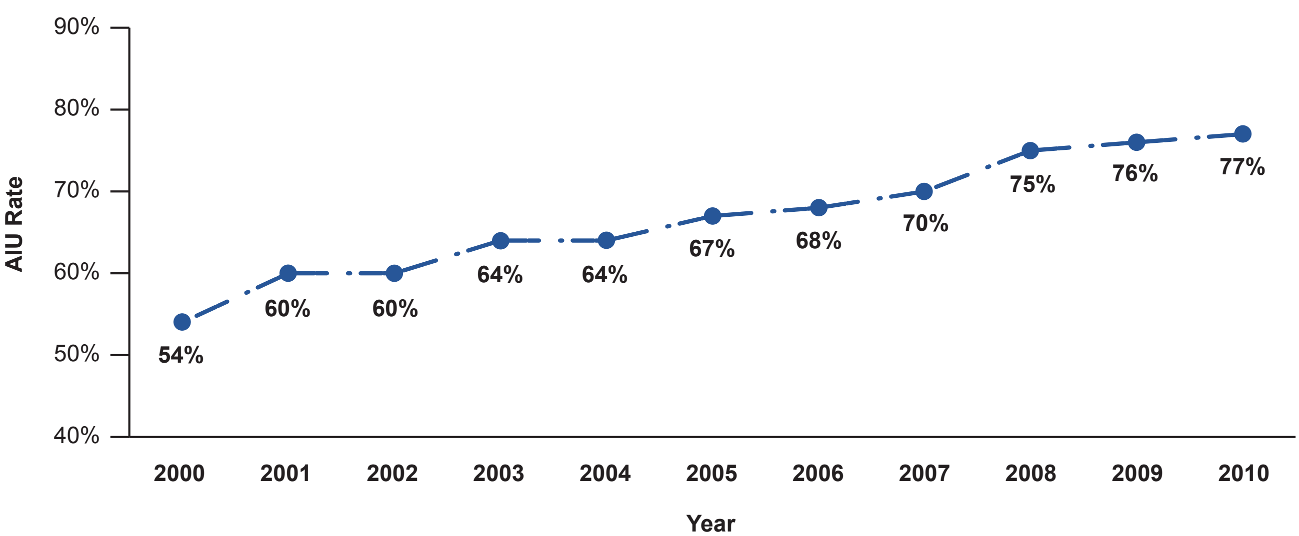
While the Internet has not replaced the dealer franchise system, it has changed the way consumers shop for new and used vehicles. This paper will explore how the Internet has affected the vehicle-shopping process from the consumer point of view by identifying the similarities and differences in the shopping behavior of four groups of new-vehicle shoppers: Non-AIUs (those who didn't use the Internet in their vehicle shopping process); AIUs (those who used the Internet in their vehicle shopping process); Submitters (those who sent an online request for information to a dealer); and OSBs (online submit buyers, or those who purchased from a dealer who responded to their online request).

> "While the rate of AIUs has increased dramatically during the past 10 years, the rate of growth has slowed more recently, increasing by only 1 or 2 percentage points per year for 2 years."

Who's Using the Internet to Shop for Vehicles

While 77%[3] of all new-vehicle buyers used the Internet to help them in their vehicle shopping process, the growth in the AIU rate has been very modest during the past 3 years, compared to an AIU rate of 67% in 2005 and 54% in 2000.[4] While the rate of AIUs has increased dramatically during the past 10 years, the rate of growth has slowed more recently, increasing by only 1 or 2 percentage points per year for 2 years.

Automotive Internet Usage among New-Vehicle Buyers: 2000–2010



Source: J.D. Power and Associates New Autoshopper.com Study,SM 2000–2008
J.D. Power and Associates/Compete, Inc. Web Site Performance ToolSM (WSPT), 2009–2010

Figure 1

[3] *J.D. Power and Associates/Compete, Inc. In-Market Buyer Behavior ToolSM*

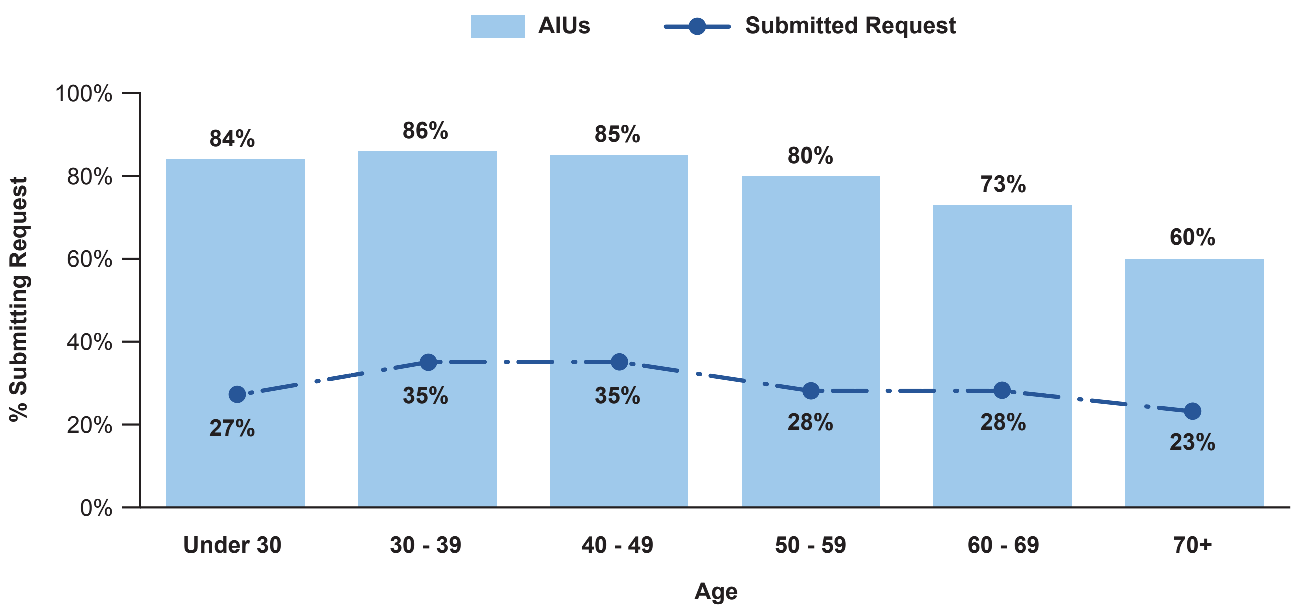
[4] *J.D. Power and Associates New Autoshopper.com Study,SM 2000 and 2005*

AIU Rate by Age

Because the AIU rate has stagnated during the past few years, some may question whether the number of such shoppers has peaked. The answer to this question is based on an examination of the AIU rate by the age of shoppers. While not dramatic, there are demographic differences between the way AIUs shop for a vehicle and consumers who do so in a more traditional way. According to data from the *2010 US Sales Satisfaction Index (SSI) Study,* shoppers under the age of 40 are the most likely to be AIUs, with about 85% using the Internet in their vehicle-shopping process. The fact that there is no difference in the AIU rate between shoppers in their twenties and those in their thirties suggests that the AIU rate will remain stable for the foreseeable future—in the high 80 to low 90 percent age range.

> “Shoppers under the age of 40 are the most likely to be AIUs, with about 87% using the Internet in their vehicle-shopping process.”

AIU and Submitting Online Request Rates by Age



*Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study*SM

Figure 2

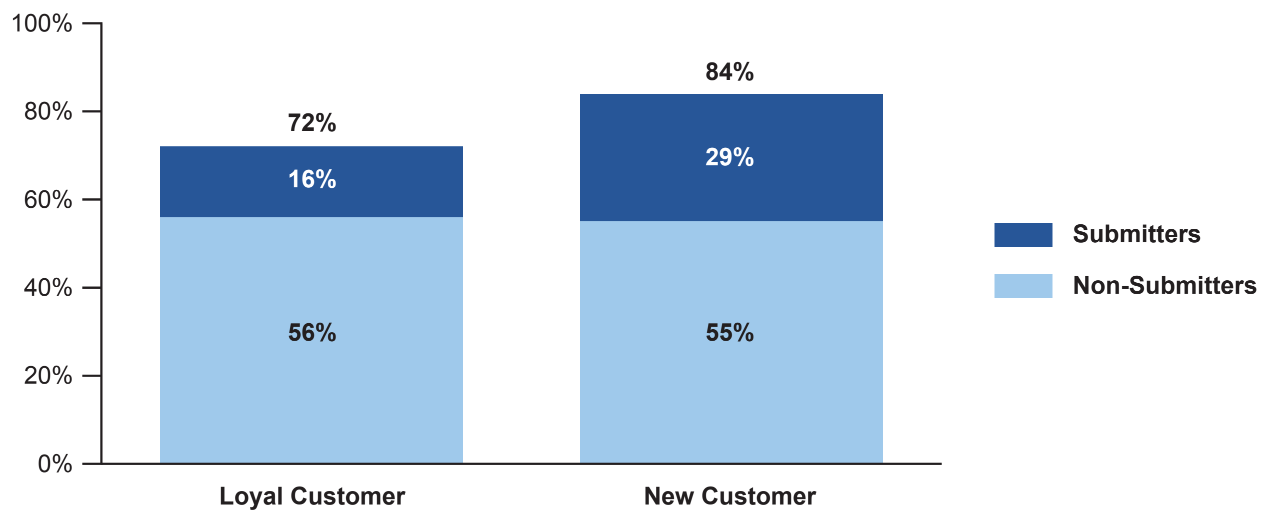
The AIU rate among those 50 years old and older is where the relationship between age and likelihood to use the Internet to shop for a vehicle becomes more apparent. The AIU rate drops slightly among those in their fifties (80% vs. 85% among those in their forties), according to the *2010 US Sales Satisfaction Index (SSI) Study.* New-vehicle buyers ages 70 and older are the least likely to use the Internet to assist in their vehicle shopping, with only 60% doing so.

It is interesting to note that the likelihood that an AIU will take the next step and submit an online request for information declines with the age of the shopper, with one exception. AIUs under the age of 30 are less likely to submit an online request (27%) than those in their thirties or forties (35% in each age group). In fact, AIUs 50-70 years old are just as likely to submit an online request to a dealer as those under the age of 30. The question is, will these young shoppers change their behavior as they get older, or will the rate of online leads continue to stagnate and then decline as today’s younger generations age?

The Effect of the Internet on Loyalty

Another factor that may impact the AIU rate is the high loyalty many customers have for their dealership. Loyal customers may have little use for going online—after all, they already know what brand or model they are going to purchase and where to get it. Data from the *2010 US Sales Satisfaction Index (SSI) Study* shows that while loyal customers are less likely to use the Internet in their vehicle shopping process (72% vs. 84% for non-loyal customers), a sizable number of loyal customers still use the Internet to shop for a vehicle. Loyal customers are also less likely to submit an online request for information to a dealer.

AIU Submission Rate: Loyalty vs. New Customers



Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study[SM]

Figure 3

The *2010 US Sales Satisfaction Index (SSI) Study* findings also indicate that loyal customers who use the Internet to submit requests are just as likely to collect competitive information from other dealers as they are to send an online request to the dealership to which they are loyal—just 53% sent a request to the dealer from which they previously had purchased a vehicle. In other words, more than half of loyal Submitters decided to begin their dealer interaction online for their next vehicle purchase, even though they had an established relationship with a dealer. This suggests that the online lead process is not only a conquesting tool, but may also help a dealership maintain or increase loyalty among its current owner body. The takeaway is that dealers need to encourage their loyal customers to use the Internet to begin communicating with them when they are ready to purchase their next vehicle—otherwise, those customers may instead send an online request only to a competitor.

> “More than half of loyal Submitters decided to begin their dealer interaction online for their next vehicle purchase, even though they had an established relationship with a dealer.”

Premium and Import Buyers Are More Apt to Use the Internet for Vehicle Shopping

Premium, or luxury, brand shoppers are slightly more likely to be AIUs (82%) than Non-Premium new-vehicle shoppers (79%), and they also are slightly more likely to submit an online request (26% vs. 24%, respectively).

Similarly, import brand shoppers, compared with domestic brand shoppers, are even more likely to use the Internet in their shopping process (81% vs. 76%, respectively) and to submit an online request (27% vs. 19%, respectively). For example, shoppers of Japanese brands, with an AIU rate of 81%, are the most likely to submit an online request (28%). In contrast, domestic shoppers are the least likely to use the Internet in their vehicle shopping process (76% are AIUs), and are also the least likely to submit an online request to a dealer (19% of domestic buyers submit an online request, compared to 27% of import buyers).

Among vehicle brands, Acura shoppers are the most likely to submit an online request to a dealer (38%), compared with 24% industry average. Infiniti (37%); Mazda (34%); Audi (33%); Honda (31%); and Subaru (32%) also have large proportions of shoppers who submit online requests.

AIU Rate by Brand

	AIU Rate	Submitted Online Request	Purchased from a Dealer Who Responded to Request
Total	**79%**	**24%**	**15%**
Acura	87%	38%	24%
Audi	92%	33%	22%
BMW	85%	26%	14%
Buick	77%	19%	10%*
Cadillac	73%	20%	12%*
Chevrolet	76%	18%	10%
Chrysler	65%	14%	10%*
Dodge	73%	15%	8%
Ford	77%	20%	13%
GMC	78%	20%	9%
Honda	80%	31%	21%
Hyundai	80%	27%	15%
Infiniti	90%	37%	23%
Jaguar	76%	15%	#
Jeep	81%	19%	12%*
Kia	78%	22%	12%
Land Rover	84%	20%	11%*
Lexus	78%	23%	13%
Lincoln	70%	14%	9%*
Mazda	90%	34%	22%
Mercedes-Benz	79%	21%	12%
Mercury	69%	17%	8%*
MINI	94%	25%	16%*
Mitsubishi	78%	23%	12%*
Nissan	82%	24%	12%
Porsche	89%	20%	10%*
Ram	77%	20%	11%*
Scion	78%	16%	7%*
smart	80%*	18%	#
Subaru	91%	32%	19%
Suzuki	65%	12%	#
Toyota	78%	26%	16%
Volkswagen	87%	29%	18%
Volvo	84%	25%	14%

**Caution: Small Sample Size*

#Note: Insufficient Sample Size

Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study^SM

Figure 4

“Among vehicle brands, Acura shoppers are the most likely to submit an online request to a dealer (38%), compared with 24% industry average.”

With high percentages of shoppers sending online requests, Acura and Infiniti also lead the list for the number of buyers stating they purchased from a dealer who responded to their online request (24% and 23%, respectively). However, this equates to only 62% of those shoppers who submitted a request. While these percentages are above the industry average (60% of Submitters purchased from a dealer who responded to their request), there is still room for improvement. For example, approximately two-thirds of Audi, Honda, and Ford Submitters purchased from a responding dealer. While Ford dealers are excellent at closing online leads, they are below average in AIU rate (77% vs. 79% industry average) and in submission rate (20% vs. 24% industry average). Although Ford dealers do an excellent job of handling online requests, only 13% of sales result from online leads.

The brands with the lowest percentages of buyers sending dealers an online request for information are Suzuki (12%); Chrysler (14%); Lincoln (14%); Dodge (15%); Jaguar (15%); and Scion (16%). For many of these brands, the fact that so few of their buyers use the Internet for shopping in the first place hinders dealers' ability to achieve high rates of online requests. For example, only 65% of Chrysler and Suzuki buyers are AIUs, compared with the industry average of 79%. However, the Scion and Jaguar brands both have fairly average rates of AIUs among their buyers (78% and 76%, respectively)—yet these buyers are simply less likely to use the online request process.

Submitters By Brand

Submitters to Brands of British Origin Receive More Personal Contact

The relatively low online submission rate among buyers of brands with British origins—including Jaguar, Land Rover and MINI—may be due in part to a difference in how dealers approach shoppers interested in these niche-brand vehicles. For instance, J.D. Power research finds that dealers of these brands typically use a different approach in responding to shopper requests.

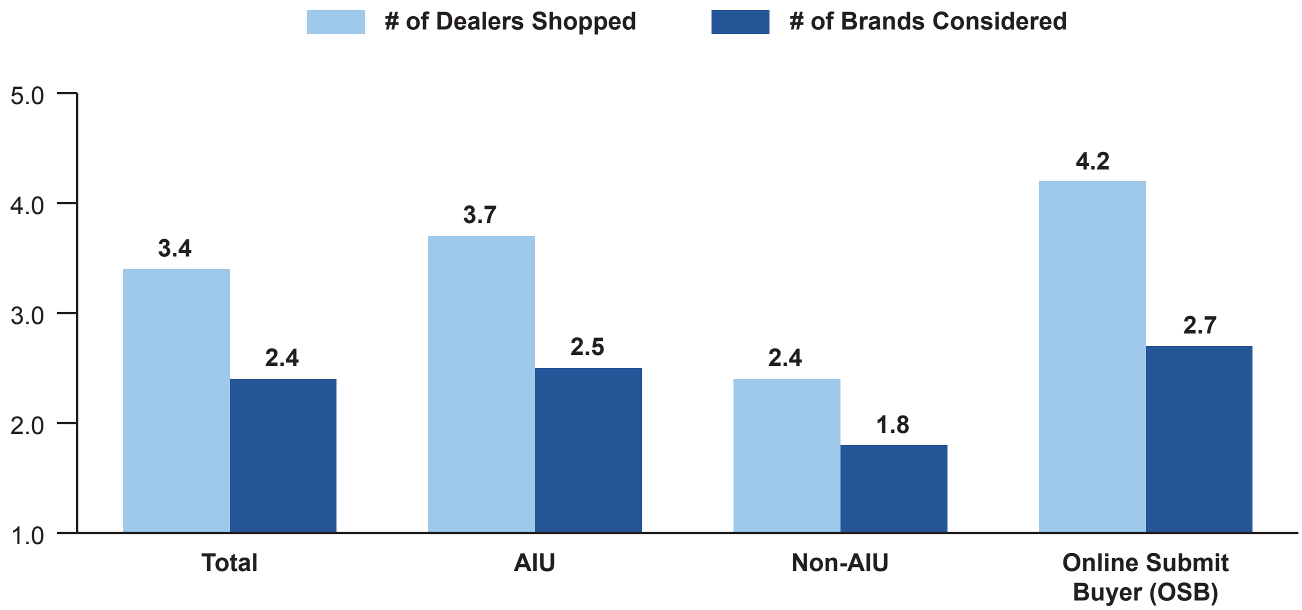
Shoppers of these brands who submit an online request are the most likely to say that the dealership responded to them with a phone call (40%, on average, compared with 28% industry average) and are least likely to say that the dealer responded via email (54% vs. 65% industry average). While buyers of British-origin brands are the most likely to be AIUs (89%), they are among the least likely to submit an online request, with only 23% doing so.

However, even though the dealer contacts these shoppers by phone, the response time is generally longer—averaging 16 hours, compared to the industry average of 12 hours. On the plus side, shoppers of these brands say they have more contact with the dealer before visiting the dealership (4.1 contacts, compared with 3.1 industry average) and are more likely to say that after visiting the dealership, they interacted with the same salesperson at the retail outlet that handled their online request (76% vs. 64% industry average). This is a positive sign, and may be one of the reasons why Jaguar has received the highest scores in the *J.D. Power and Associates US Sales Satisfaction Index (SSI) Study*℠ for the past 3 years.

The Internet's Impact on Dealer Choice

A common assumption is that shoppers use the Internet to assist in the new-vehicle shopping process to reduce the number of dealerships they need to visit. However, J.D. Power research shows that the opposite is in fact true—AIUs visit more dealerships (3.7, on average) than non-AIUs (2.4, on average). AIUs also consider slightly more brands in their shopping process than do Non-AIUs. On average, AIUs shop 2.5 brands, while Non-AIUs shop 1.8 brands. Additionally, AIUs who submit online requests tend to shop even more dealers than the average AIU (4.2. vs. 3.7, respectively). However, receiving an online request from someone does not mean they are going to be an easy sale. In fact, the data suggests that close rates are lower among submitters (because they are skipping more dealers) than for a typical walk-in shopper.

Number of Brands and Dealers Shopped



Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study[SM]

Figure 5

Dealer Experience is King

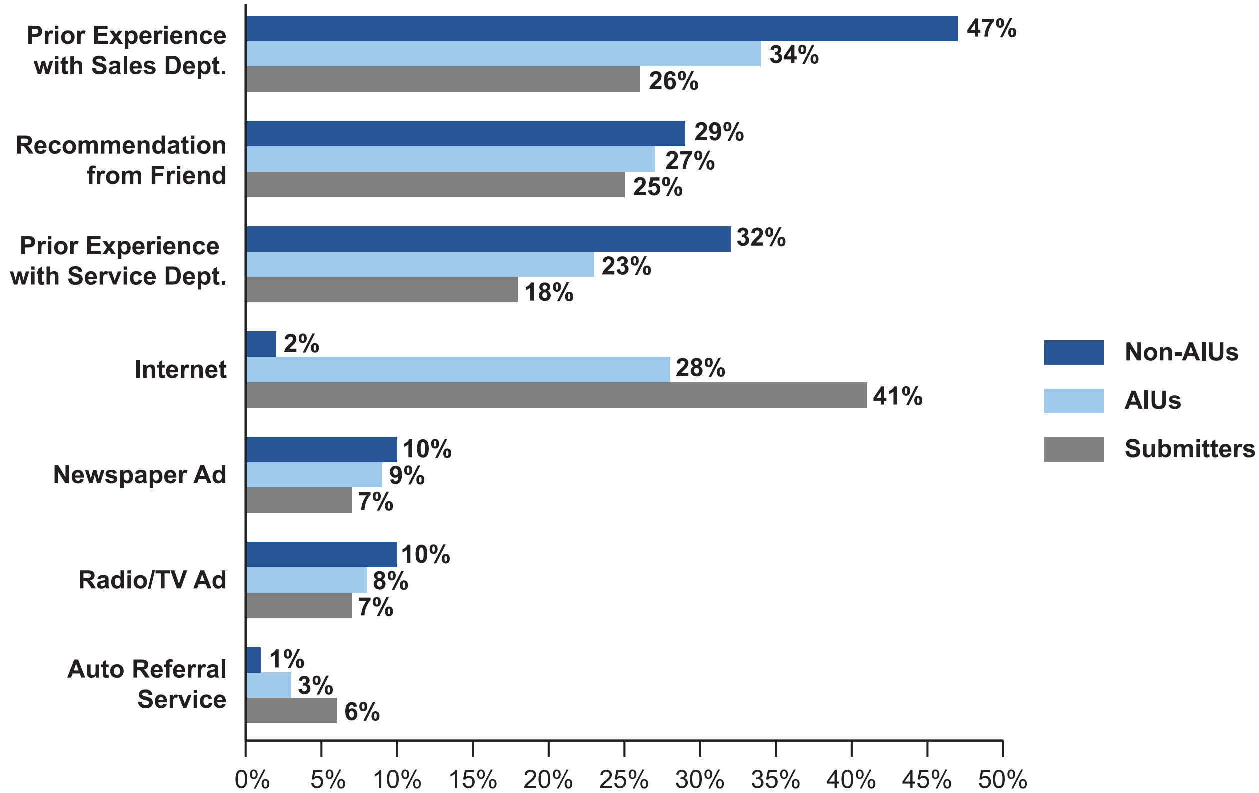
When asked the reason for visiting the dealership they purchased from, 37% of all new-vehicle buyers cite prior experience with the dealership's sales department. Likewise, 25% of shoppers cite that their prior experience with the dealership's service department was the factor that most influenced their decision to shop at the dealership. These percentages illustrate the importance of the dealer-customer relationship in attracting shoppers.

> "Even among AIUs, prior experience with the dealership's sales department is the No. 1 reason for choosing which dealers to shop (34%)."

The next-most-important reason mentioned by new-vehicle shoppers is recommendations from friends (27%). Information found online is the fourth-most-often cited reason (22%) for visiting a dealer, but is the most influential reason outside of their personal experience or that of friends or relatives.

Even among AIUs, prior experience with the dealership's sales department is the No. 1 reason for choosing which dealers to shop (34%). Internet information or online referrals is the second-most-influential reason in AIUs' decision-making process (28%). This indicates that the increase in Internet shopping has not reduced the need for dealers to focus on customer satisfaction, because even among those who say they used the Internet to help them decide which dealerships to shop, their prior experience with a dealer was still a stronger influence.

Reason for Visiting Dealership Purchased From



Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study℠

Figure 6

In general, online shopping does not have a significant influence on dealer choice unless an online request or referral is completed. Both AIUs and Non-AIUs say previous experience with the dealer's sales department is more important than Internet information as a reason for visiting a dealer. The opposite is true among those sending a dealer an online request, of which 41% indicate that Internet information or an online referral influenced their decision to visit the dealer from which they purchased their new vehicle, while the influence of a prior experience with dealership salespeople declines to 26%.

With regard to Non-AIUs, there are even more compelling reasons for a dealership to pay close attention. When these customers shop for a new vehicle, their experience with the dealership is even more influential. In comparison with the 34% of AIUs who cite a prior sales experience with the dealer as a major reason for visiting the store from which they ultimately selected their vehicle, nearly half (47%) of non-Internet shoppers do so.

Online Requests for Information

While prior sales experience with the dealer is the No. 1 reason for choosing to shop at a particular dealership, many AIUs first contact the dealer via an online request for information. It is interesting to note that 28% of AIUs say that the Internet was the major influence in deciding which dealer to shop, which is similar to the 31% of AIUs who submitted an online request to a dealer. The fact that 41% of shoppers who submitted an online request cite the Internet as a reason for deciding which dealers to shop indicates the importance of the online request process in driving traffic to the dealership.

Price Is Still the Most Prevalent Online Request

The process to request vehicle information online began a number of years ago as a request for a price quote, or RFP, process. Currently, shoppers are encouraged to send an online inquiry about anything they wish to know from a dealer. However, questions about new-vehicle price is still the most common reason shoppers send an online request to a dealer. A majority (90%) of those submitting a request say they wanted pricing information, while 63% wanted to know whether a particular model they were interested in was available at the dealership. Additional product information is requested by just 42% of shoppers.

> "Currently, shoppers are encouraged to send an online inquiry about anything they wish to know from a dealer. However, questions about new-vehicle price is still the most common reason shoppers send an online request to a dealer."

Dealer Response to Leads

Overall, dealers do an excellent job responding to online leads—97% of buyers indicate that they received a response from a dealer. However, dealers need to do more than just respond to a request, or lead, as less than two-thirds (60%) of shoppers who submit an online request decide to purchase their new vehicle from the dealer who responded to their request.

Dealer response rates are fairly consistent across all brands. For example, buyers of Honda, Volkswagen, and Porsche brands are most likely to say they received a response to their online request, with 99% who say the dealer responded, indicating that nearly all dealers realize the importance of responding to an online request.

Success with the Dealer Process

Internet Responses Build Relationships

A small, successful Hyundai dealership in Southern California uses the Internet to capture new business and cater to customers, as well as to enhance the manner in which the sales staff treats customers. Five or six years ago, one-third of this store's advertising budget was spent on the Internet; today, it has grown to 70% of the budget. Instead of advertising on TV or in local newspapers, this dealership is spending the lion's share of its advertising budget online.

Compared with print, online advertising is less expensive, more targeted, and offers the flexibility to be changed more frequently, according to a J.D. Power consultant who visited the store. Also, Internet displays can be changed; they are not static and links are available. An online shopper clicks on the dealership ad and is taken directly to the showroom, where they can look at both new and used vehicles, parts, service information, and other merchandise. Also, the shopper can set up a sales appointment and ask questions online.

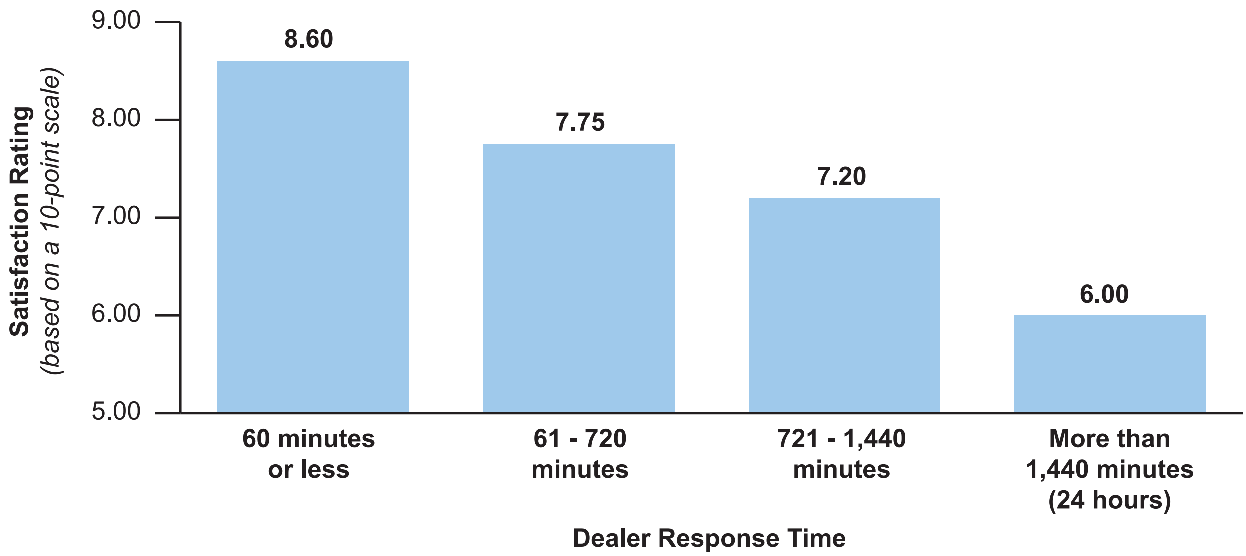
In addition to focusing on Internet advertising and communication, this dealership has special processes in place to make sure that shoppers are treated with respect. The customer care process begins on the Internet and continues with the in-store sales experience. The way to win profits is to build relationships through new-vehicle sales, which may actually lose money, and to realize back-end opportunities with F&I, service, and parts. In other words, it is a holistic approach, and it begins with correctly responding to online leads or requests.

All customers feel apprehension when they walk in to a dealership to look at a vehicle, according to the J.D. Power consultant. They are about to make a big purchase, and many buyers are making the second-biggest purchase of their life. They are wary of paying too much and getting in over their head. Building up trust and understanding and putting them at ease are key for enhancing the sales experience, according to the general manager of this profitable Hyundai store and J.D. Power study research findings.

Response Time

J.D. Power study results indicate that most new-vehicle shoppers who submitted an information request received a response from the dealer within 12 hours, which, in a world of real-time expectations, may not be fast enough for some shoppers. On the positive side, 33% of shoppers report that the dealer responded within 1 hour. At the other end of the spectrum, 5% of shoppers report that it took more than 24 hours to receive a response.

Satisfaction with Response Time



Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study[SM]

Figure 7

Timeliness impacts satisfaction. J.D. Power research indicates that satisfaction with the amount of time it takes to receive a response is fair: a rating of 7.75 on a 10-point scale. If a dealer responds to a new-vehicle shopper's online request within 1 hour, satisfaction increases to 8.6, but declines dramatically to 6.0 when a dealer takes more than 24 hours to respond, indicating that many shoppers expect near-immediate feedback after sending an inquiry.

Responding to online requests via telephone results in higher satisfaction with response time (8.14) than for email response (7.69) or an automated email response (6.56).

The Need to Respond Clearly and Directly to Online Requests

While the majority of dealers respond to online requests, they do not always provide the exact information about which shoppers are inquiring. J.D. Power research shows that 14% of AIUs say that the dealer only provided minimal information, while another 1% say that they never received any of the information they requested.

There are several likely reasons for this. Some dealers are reluctant to provide firm price quotes via email. They prefer to meet with the shopper at the dealership before discussing price. It may be assumed that this is the case for the 14% of shoppers who state that the dealer only provided minimal information. However, the data does not support this theory. Shoppers who request a price quote from a dealer are just as likely to say the dealer provided all of the information that was requested as are shoppers who inquired about the availability of a specific vehicle or for general product information. Therefore, a lack of a complete response does not appear to stem from dealers' reluctance to provide a price quote via email.

“J.D. Power research shows that 14% of AIUs say that the dealer only provided minimal information, while another 1% say that they never received any of the information they requested.”

Accurate answers and specific information to a request or question—whether about price, a specific vehicle or model feature, or whether a vehicle is in stock or a model is available with specific features—are key elements in satisfying new-vehicle buyers. When the dealer provides all of the information requested, the average satisfaction rating is 8.04, but declines to 6.24 when only part of the requested information is provided.

Mystery Shop of Online Lead Response from Dealers

To better understand how dealerships are meeting shoppers' needs, J.D. Power recently tracked online leads sent to a select group of dealerships during a 30-day period through mystery shops. A total of 304 leads were submitted, and email responses were categorized as either automated templates or personalized responses, and analyzed to determine best practices in Internet lead handling.

While data from the *2010 US Sales Satisfaction Index (SSI) Study* indicates that an overwhelming majority of dealers respond to online buyer requests, mystery shop data shows that attention to detail is a shortcoming by many dealers. Emails of more than half of dealers (56%) who use automated responses include errors related to grammar, spelling, or punctuation. Dealers who utilize personalized responses have an even higher incidence of errors, as 66% of responses contained some type of error. Accordingly, templates should be periodically proofread for errors, and fields that include auto-filled information (customer name, vehicle model information, etc.) should be checked for accuracy.

One best practice that most dealers are now instituting is to include salesperson contact information in the response. This lets the shopper know that they are dealing with an actual person. However, opportunities exist to add additional information to these responses.

Many shoppers who send online leads contact more than one dealership. Therefore, it is a best practice to include all pertinent dealer information in the response. However, according to the mystery shop data, only 25% of automated messages and 39% of personalized messages include hours of operation and/or directions to the dealership. This information can be easily included in the footer of the message, or as a link to the information on the dealership website.

Likewise, only 18% of automated messages and 8% of personalized messages contained information listing specific advantages of visiting the dealership. Including dealer-specific advantages can create differentiation and value for the shopper and increase the likelihood that the shopper actually visits the dealership.

While every salesperson knows that closing the sale is the most critical step in the sales process, it is often overlooked in responses to online inquiries. In online requests, the close is dependent on getting the shopper to visit the dealership in person. According to the mystery shop data, only 26% of automated responses and 35% of personalized responses ask for an appointment time. This suggests that there is opportunity to take a more proactive approach to securing appointments from shoppers through email.

Answering all of the shopper's questions in the first personalized email response can create transparency and credibility, which increases the likelihood that the shopper will want to do business with the dealership. In these mystery shops, 41% of first personalized responses included a complete response to the customer inquiry. Of those that only provided a partial response, 40% did not include the price of the vehicle and 60% did not address vehicle availability.

In some cases, the dealer may not have the specific vehicle in stock about which the shopper inquired. Recommending alternative vehicles can be effective, provided that the dealership has adequately addressed the shopper's specific questions. The mystery shop data finds that only 18% of dealerships offered an alternative vehicle (new or used) in any of the automated or personalized responses.

While dealers are doing an adequate job of responding to online inquiries in a timely manner, there is room for improvement in the quality of the responses provided. Dealers need to treat every online request as an opportunity to drive more quality traffic to their dealership. This can best be achieved by responding to the specific questions asked by the shopper in the request, in as much detail as possible, and inviting the shopper to visit the dealership to investigate further.

The Sales Process Starts Outside the Dealership

J.D. Power study findings also indicate that the sales process for online Submitters begins well before they visit a dealership. On average, dealers contact Submitters three times in response to their online requests prior to when they visit the dealership. It is important to establish a good relationship with shoppers in whatever mode they prefer: either by email, by phone, or in person.

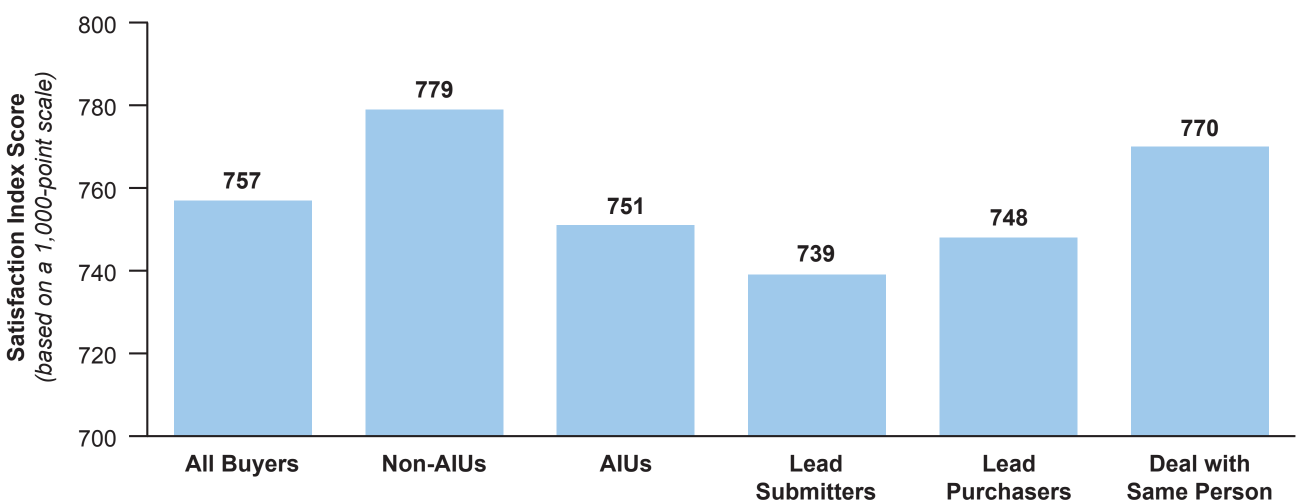
It is also important for the dealer to continue the online relationship into the dealership. New-vehicle shoppers expect to work with the same salesperson at the dealership that they dealt with either online or via the phone. For the most part, dealerships are meeting this expectation, as 64% of AIUs say that the salesperson they dealt with at the dealership was the same salesperson they dealt with online. BMW dealers provide a good example of conducting the sales process outside the dealership, as the average BMW buyer says that they interacted with a salesperson from the dealership 4.6 times before actually visiting the store. It is therefore not unexpected that BMW has among the highest rate of shoppers who requested information online from a BMW dealer who also interacted with the same salesperson when they visited the dealership.

AIU Satisfaction with the Sales Experience

In general, satisfaction with the selling dealer is higher among Non-AIUs (779 on a 1,000-point scale) than among AIUs (751). Satisfaction is significantly lower among AIUs who submit an online request to a dealer (739). This suggests that dealers are not meeting the expectations of those shoppers who submit online requests. These shoppers likely expect that the online lead process will make the process at the dealership much smoother and quicker. However, AIUs and Submitters spend about the same amount of time at the dealership from which they purchased their vehicle.

> “Satisfaction with the selling dealer is higher among Non-AIUs (779) than among AIUs (751). Satisfaction is significantly lower among AIUs who submit an online request to a dealer (739).”

Overall Satisfaction with Sales Experience

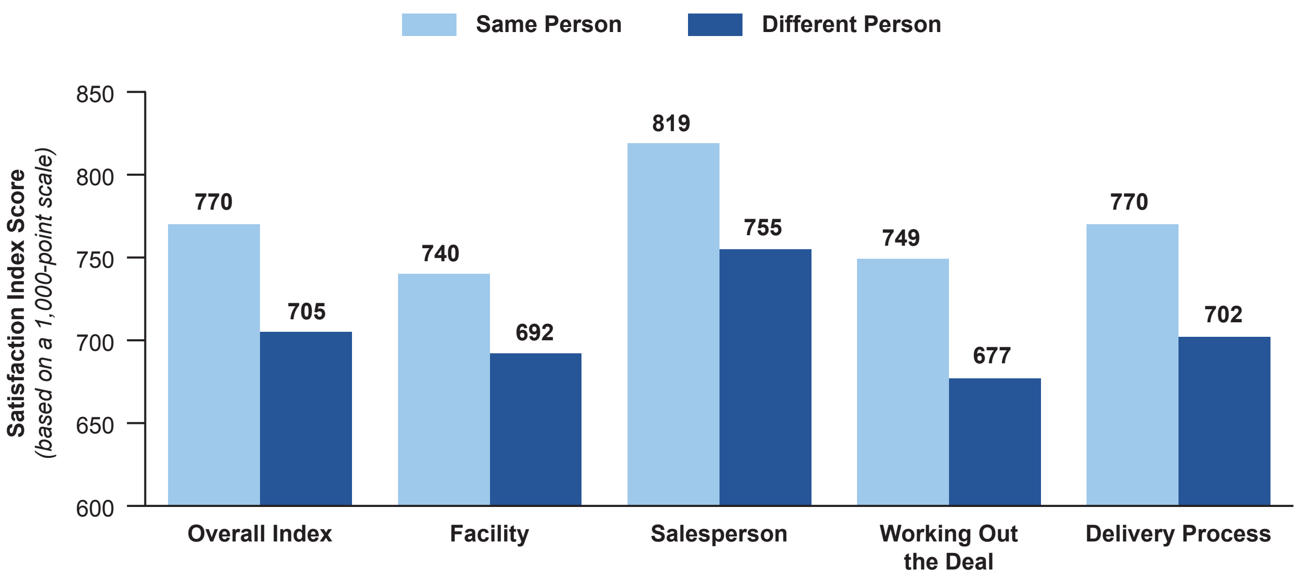


Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study[SM]

Figure 8

Notably, satisfaction is much higher among shoppers who submit an online request to a dealer and subsequently work with the same salesperson at the dealership that responded to them than among all buyers (770 vs. 757, respectively). In addition, satisfaction among these shoppers is much higher than the average among Submitters (748). This indicates that there are substantial benefits to be gained from ensuring that shoppers deal with the same salesperson at the dealership from start to finish, even when the deal begins with an online request for information.

Overall Satisfaction with Sales Experience among Submitters By Person They Dealt with At the Dealership



Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study[SM]

Figure 9

By comparing the satisfaction levels of Submitters who worked with the same salesperson at the dealership that they worked with online with those of Submitters who worked with different dealership personnel, it can be surmised why satisfaction is higher when shoppers work with the same dealer representative. While satisfaction scores are lower across the board between the two groups, the gap is largest for satisfaction with working out the deal (819 vs. 755, respectively—a significant 72-point gap). From this, it would appear that dealers are better able to meet pricing expectations when they ensure that shoppers deal with only one person at the dealership, whether that be online, via the phone, or in the dealership.

In addition, shoppers who deal with one salesperson who has total authority in determining a final price are the most satisfied with the sales process. Shorter negotiation time creates less pressure and also increases satisfaction, according to *2010 US Sales Satisfaction Index (SSI) Study* findings. This holds true for both AIUs and Non-AIUs; however, AIUs are less likely to say that they dealt with only one salesperson throughout the entire sales process.

> “Shorter negotiation time creates less pressure and also increases satisfaction, according to *2010 US Sales Satisfaction Index (SSI) Study* findings.”

Sales Pressure Affects Nearly 25% of AIUs at Dealership

AIUs are sensitive to sales pressure tactics, as 23% of these shoppers say they experienced some or too much pressure during the sales process, compared with only 17% of Non-AIUs.

Salespeople need to be aware of this and take extra precautions when working with a customer whom they are aware initially shopped online. Findings from the *2010 US Sales Satisfaction Index (SSI) Study* suggest that dealers could increase the likelihood of closing the sale if their salespeople apply less pressure to those customers they obtain through an online lead. While 27% of those who submitted an online request but did not purchase from that dealer say they experienced some pressure or too much pressure at the dealership from which they did purchase, only 23% of online Submitters who purchased a vehicle from the dealer to which they sent an online request experienced sales pressure.

Delivery Process Priorities Differ Slightly between AIUs and Non-AIUs

Overall, more than four in 10 AIUs (43%) indicate they preferred only a moderate explanation of the vehicle's controls and features at the time they took delivery, whereas 44% of Non-AIUs are most likely to say they preferred a detailed explanation. This may be due in part to the fact that AIUs have conducted a great deal of research and already understand much more about their new vehicle's features than do Non-AIUs before visiting the dealership.

Rejection and Purchase Reasons

Rejection Reasons

When asked why they didn't buy from a dealer they shopped, AIUs are more likely than Non-AIUs to say that the vehicle wasn't right for them (37% vs. 33%), according to the *2010 US Sales Satisfaction Index (SSI) Study.* This finding is somewhat counterintuitive, as one may conclude that the online shopping process would have helped to eliminate models from the consideration set and allowed shoppers to be more focused once they started visiting dealerships. This suggests that shoppers may be reluctant to completely strike a vehicle from their original consideration set based solely on information they found online. Another explanation may be that despite all the information and interactive tools provided on automotive shopping sites, online shoppers are still not able to collect all of the information they need in order to make a completely informed decision about which vehicle to purchase.

"When asked why they didn't buy from a dealer they shopped, AIUs are more likely than Non-AIUs to say that the vehicle wasn't right for them (37% vs. 33%), according to the *2010 US Sales Satisfaction Index (SSI) Study.*"

Reasons for Rejection

	AIUs	Non-AIUs	Submitters	Purchase from Submit Dealer
Decided this make/model wasn't right for my needs	37%	33%	35%	36%
Dealer's price was too high	31%	33%	34%	36%
Dealer didn't have the exact vehicle I wanted in stock	27%	27%	28%	29%
Decided this make/model was too expensive	20%	23%	18%	18%
I just wasn't ready to buy when I was at this dealer	19%	22%	15%	14%
Dealer wouldn't give a straight answer about price	17%	19%	20%	20%
Dealer didn't offer enough for my trade-in	14%	19%	13%	13%
Dealer staff applied too much sales pressure	13%	14%	14%	14%
Dealer was too busy/did not focus enough attention on me	11%	11%	12%	11%
Dealer staff was rude/not courteous	10%	9%	11%	11%
Dealer was not completely honest with me	10%	11%	12%	13%
Dealer staff didn't seem knowledgeable	9%	9%	9%	9%
Dealer was not conveniently located	8%	7%	8%	7%
Dealer was unable to provide adequate financing	5%	11%	6%	6%

Source: J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study℠

Figure 10

Another difference between AIUs and Non-AIUs with regard to reasons for not purchasing a vehicle they shopped at a dealership is that Non-AIUs are more likely to report they weren't offered enough for their trade-in (19% vs. 14% for AIUs). Many vehicle shopping sites provide information on trade-in values, and this information likely helps to set realistic expectations among AIUs about the value of their used vehicle.

Dealer Responsiveness Trumps Low Price

As previously discussed, regardless of the initial reason for visiting a dealership, both AIUs and Non-AIUs indicate that the primary reason for purchasing from their chosen dealer is that they were treated well. In fact, among both groups of buyers, how they were treated by the dealer was cited more often as a reason than was getting the lowest price.

However, among AIUs, those who completed an online request or query were slightly more likely to mention low price (54%) than dealer treatment (51%) as the primary reason for buying from the dealership. This difference is larger among those who purchased from the dealer to whom they submitted their online request. Among these shoppers, 58% cite price as the reason for purchasing from the dealer, compared with 52% who cite dealer treatment, according to the *2010 US Sales Satisfaction Index (SSI) Study.*

Results from this study also indicate that those new-vehicle buyers who submit an online request are more likely than those who do not to reject a dealer because the price is too high (34% vs. 30%, respectively), and because the dealer won't give them a straight answer regarding the vehicle price (20% vs. 15%, respectively). This suggests that while AIUs may not be more price-sensitive than Non-AIUs, satisfaction of those who submit online requests is driven more by price than it is for other shoppers.

During the online shopping process and through communication they had with the dealership based on their online request, online submitters most likely had a very clear idea of exactly what they expected to pay for their vehicle. When the actual dealer's price is different from the price they expected to pay, it creates a lack of trust or negative feeling about the dealership.

"Results from the *2010 US Sales Satisfaction Index (SSI) Study* indicate that new-vehicle buyers who submit an online request are more likely than those who do not to reject a dealer because the price is too high (34% vs. 30%, respectively), and because the dealer won't give them a straight answer regarding the vehicle price (20% vs. 15%, respectively)."

Price vs. Monthly Payment

While both AIUs and Non-AIUs are more likely than other shoppers to focus on the total price paid for a vehicle rather than a low monthly payment, AIUs place the most importance on the total price paid, with 66% indicating it is more important than a low monthly payment, compared with 54% of Non-AIUs. Shoppers submitting online requests are even more likely to be focused on the total price paid, as 73% indicate it is more important than a low monthly payment. Dealers may find this insight useful in negotiations with customers obtained through an online lead.

Conclusion

Understanding New-Vehicle Buyer Behavior Helps with Sales Strategies

Today, more than three-fourths of new-vehicle buyers use the Internet in their vehicle shopping process. This is likely to slowly increase to approximately 90% in the long term, based on the high AIU rate among shoppers under the age of 40. Due to high AIU rates, dealers must consider their Internet shoppers as the norm and no longer use unique processes and procedures for this particular type of customer.

The Internet has given manufacturers, independent online auto sites, and dealerships the opportunity to create many online resources, and shoppers who use the Internet are generally better informed and expect to spend less time in the sales process at the dealership. J.D. Power research indicates that despite the abundance of online information, the importance of the dealership experience is still paramount to all new-vehicle buyers. Providing accurate and comprehensive responses to online buyer requests is critical to bridging the online experience with the dealer experience.

Building relationships is key to dealers' success. Understanding that AIUs have different priorities in their new-vehicle shopping process than do Non-AIUs is also key to appealing to these different types of shoppers, as is understanding that even loyal customers need to be catered to online, since 72% are online shoppers and 16% of them submit online requests to dealerships.

Once they visit the dealership, those shoppers who started their relationship with the dealer through an online request expect the process to go much more smoothly and quickly than the typical retail purchase process. They expect to deal with the same salesperson they dealt with online and that the vehicle they are interested in will be ready for their inspection at the dealership. Dealers who meet these needs are more likely to close the sale than are those who treat online leads like every other customer. AIUs are much more sensitive to sales pressure techniques and are more likely to walk out of the dealership because the salesperson was rude or discourteous. Salespeople need to be extremely courteous while working with these shoppers.

While shoppers who submit an online request are likely to be more price conscious than other customers, salespeople need to realize that these shoppers, on the whole, are more focused on getting the options and features that meet their needs. Because Internet shoppers have already determined which options and features they want, the salesperson needs to make sure they are matching the shopper to the vehicle that will completely meet their needs, and avoid trying to pressure them into purchasing a different vehicle with content that they didn't specify and doesn't meet their needs.

An area of opportunity for dealers to improve satisfaction among shoppers submitting online leads is to find ways to reduce the time they spend at the dealership when purchasing their vehicle. Shoppers who submit online and ultimately buy from that dealer (OSBs) spend more time at the dealer, on average, than do AIUs and Non-AIUs. The majority of this extra time is spent on price negotiation and completing paperwork in F&I. Dealers should work with these shoppers before they visit the dealership (via phone or email) to help expedite the F&I process.

“An area of opportunity for dealers to improve satisfaction among shoppers submitting online leads is to find ways to reduce the time they spend at the dealership when purchasing their vehicle.”

The following best practices are recommended for dealerships working with AIUs and Submitters:

- Online leads must be treated with the same attention and professionalism as shoppers visiting the dealer showroom. Just because a Submitter may need several separate communications (via the phone or email) it doesn't mean that they are less likely to purchase from your dealership.
- Respond immediately with a personal email response addressing the shopper's questions, or via a phone call if possible. Automated responses are nearly worse than no response. Remember: your dealership is likely not the only one being shopped.
- Just because a loyal customer contacts you online for information, don't assume you have won their business or that you are the only dealer from which a quote has been requested. Even loyal Submitters are willing to change dealers for the right vehicle at the right price.
- A modified sales process for online Submitters is warranted, including less emphasis on service introductions, quicker delivery process, and a streamlined F&I process.
- Set an appointment via email in order to assure that the same salesperson responding to the shopper online will be available to meet that shopper in person at the dealership.
- Online Submitters who select a vehicle and agree on a price before visiting the dealership expect a more timely process while at the dealership. Ensure that the vehicle they are interested in is ready for them to inspect when they arrive at the dealership.
- During the online response or phone call, offer to email any preliminary paperwork, forms, or sales information in order to streamline and facilitate the sales and F&I processes when the shopper arrives at the dealership.

Sources

J.D. Power and Associates/Compete, Inc. Web Site Performance Tool℠ (WSPT)

J.D. Power and Associates New Autoshopper.com Study℠

J.D. Power and Associates 2010 US Sales Satisfaction Index (SSI) Study℠

J.D. Power and Associates 2011 Auto Offline Media Report℠—Winter

For more information about J.D. Power and Associates automotive products and services, please contact:

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Appendix

Origin

	Total	Premium	Non-Premium	Domestic	Import	British	German	Swedish	Japanese	Korean
Used Internet to help shop for new vehicle										
%Yes	79%	82%	79%	76%	81%	89%	85%	84%	81%	79%
Submitted online purchase/price request to any dealer										
%Yes (Based to Total)	24%	26%	24%	19%	27%	23%	26%	25%	28%	25%
%Yes (Based to AIUs)	31%	32%	30%	25%	34%	26%	31%	30%	35%	32%
Got response from a dealer										
%Yes (Based to Submitters)	97%	96%	98%	97%	98%	95%	97%	97%	98%	97%
Purchased vehicle from a dealer who responded to request										
%Yes (Based to Submitters)	60%	59%	60%	59%	60%	60%	60%	57%	61%	54%
Type of information requested online										
Vehicle price quote	90%	89%	90%	85%	92%	83%	88%	82%*	93%	86%
Vehicle availability	63%	63%	63%	70%	60%	61%	69%	72%*	59%	61%
Product information	42%	47%	42%	47%	40%	62%	49%	53%*	38%	45%
Other	4%	3%	4%	4%	4%	5%	4%	7%*	3%	4%
Time taken by dealer to contact you after submitting online request										
Mean / Minutes	730	814	718	673	752	978*	813	1250*	734	768
Time taken by dealer to contact you after submitting online request (categories)										
60 minutes or less	33%	29%	33%	36%	31%	28%*	32%	19%*	31%	32%
61 - 720 minutes	30%	32%	30%	30%	30%	17%*	27%	25%*	30%	30%
721 - 1440 minutes	32%	32%	32%	29%	34%	45%*	34%	42%*	34%	33%
More than 1440 minutes	5%	7%	5%	5%	5%	9%*	7%	14%*	5%	5%
Type of response from dealer to online request										
An email from an actual person	65%	64%	65%	60%	67%	54%*	65%	72%*	68%	65%
A call from someone at the dealership	28%	31%	28%	34%	26%	40%*	29%	21%*	25%	29%
An automated response	6%	5%	6%	5%	6%	4%*	6%	5%*	6%	4%
Other	1%	0%	1%	1%	1%	2%*	0%	1%*	1%	2%
Dealer response to requests for information										
Provided all the specific information I asked for	85%	87%	84%	86%	84%	89%*	87%	86%*	84%	81%
Provided minimal information	14%	12%	14%	13%	14%	10%*	12%	14%*	14%	16%
Did not provide the information I asked for	1%	1%	1%	1%	2%	1%*	1%	0%*	2%	3%
Number of times in contact with dealer prior to visit										
Mean / Weighted Average (Based to Submitters)	3.1	3.7	3.0	3.2	3.1	4.1*	3.7	3.5*	3.0	2.9
Person responded to online request same person dealt with at dealer										
%Yes (Based to Submitters)	64%	71%	63%	66%	63%	76%*	74%	75%*	62%	60%

**Caution: Small Sample Size*

Make

	Total	Acura	Audi	BMW	Buick	Cadillac	Chevrolet	Chrysler	Dodge	Ford
Used Internet to help shop for new vehicle										
%Yes	79%	87%	92%	85%	77%	73%	76%	65%	73%	77%
Submitted online purchase/price request to any dealer										
%Yes (Based to Total)	24%	39%	33%	25%	19%	21%	18%	13%	15%	20%
%Yes (Based to AIUs)	31%	44%	36%	30%	25%	28%	24%	21%	21%	26%
Got response from a dealer										
%Yes (Based to Submitters)	97%	98%	98%	95%	96%*	96%*	97%	94%*	93%	96%
Purchased vehicle from a dealer who responded to request										
%Yes (Based to Submitters)	60%	62%	65%	55%	51%*	61%*	55%	71%*	51%	66%
Type of information requested online										
Vehicle price quote	90%	96%	87%	88%	83%*	84%*	80%	82%*	90%*	87%
Vehicle availability	63%	56%	76%	71%	66%*	56%*	70%	79%*	60%*	68%
Product information	42%	30%	49%	52%	44%*	45%*	51%	35%*	48%*	46%
Other	4%	4%	2%	5%	3%*	2%*	3%	7%*	4%*	5%
Time taken by dealer to contact you after submitting online request										
Mean / Minutes	730	728	934	898	796*	900*	578	894*	741*	706
Time taken by dealer to contact you after submitting online request (categories)										
60 minutes or less	33%	36%	21%	29%	38%*	33%*	42%	14%*	43%*	35%
61 - 720 minutes	30%	27%	35%	24%	18%*	35%*	28%	29%*	21%*	31%
721 - 1440 minutes	32%	30%	36%	38%	40%*	20%*	27%	56%*	32%*	28%
More than 1440 minutes	5%	6%	8%	9%	5%*	12%*	3%	1%*	3%*	7%
Type of response from dealer to online request										
An email from an actual person	65%	75%	72%	62%	65%*	67%*	66%	61%*	59%*	55%
A call from someone at the dealership	28%	21%	24%	30%	27%*	29%*	30%	30%*	36%*	38%
An automated response	6%	3%	3%	8%	8%*	3%*	2%	8%*	5%*	7%
Other	1%	0%	0%	0%	0%*	0%*	3%	0%*	0%*	1%
Dealer response to requests for information										
Provided all the specific information I asked for	85%	85%	88%	85%	89%*	89%*	87%	74%*	79%*	85%
Provided minimal information	14%	13%	11%	13%	8%*	10%*	13%	19%*	18%*	14%
Did not provide the information I asked for	1%	1%	1%	1%	3%*	1%*	0%	7%*	3%*	1%
Number of times in contact with dealer prior to visit										
Mean / Weighted Average (Based to Submitters)	3.1	3.3	3.4	4.6	3.4*	3.1*	3.1	2.8*	3.3*	3.0
Person responded to online request same person dealt with at dealer										
%Yes (Based to Submitters)	64%	67%	78%	77%	54%*	60%*	65%	60%*	71%*	66%

**Caution: Small Sample Size*

Make *(continued)*

	GMC	Honda	Hyundai	Infiniti	Jaguar	Jeep	Kia	Land Rover	Lexus	Lincoln
Used Internet to help shop for new vehicle										
%Yes	78%	80%	80%	90%	76%	81%	78%	84%	78%	70%
Submitted online purchase/price request to any dealer										
%Yes (Based to Total)	21%	32%	27%	37%	16%	20%	22%	20%	23%	14%
%Yes (Based to AIUs)	26%	39%	34%	41%	20%	24%	28%	24%	29%	20%
Got response from a dealer										
%Yes (Based to Submitters)	96%	99%	97%	98%	#	98%*	96%	94%*	94%	95%*
Purchased vehicle from a dealer who responded to request										
%Yes (Based to Submitters)	45%	66%	54%	62%	#	60%*	56%	57%*	57%	63%*
Type of information requested online										
Vehicle price quote	88%*	95%	88%	92%	#	88%*	82%	85%*	90%	81%*
Vehicle availability	71%*	54%	63%	61%	#	79%*	55%	78%*	59%	69%*
Product information	53%*	29%	45%	45%	#	51%*	46%	54%*	54%	47%*
Other	6%*	2%	3%	4%	#	1%*	6%	0%*	1%	0%*
Time taken by dealer to contact you after submitting online request										
Mean / Minutes	725*	718	788	816	#	639*	726	1030*	688	633*
Time taken by dealer to contact you after submitting online request (categories)										
60 minutes or less	27%*	35%	26%	30%	#	44%*	43%	21%*	28%	34%*
61 - 720 minutes	33%*	26%	35%	31%	#	20%*	21%	22%*	39%	33%*
721 - 1440 minutes	36%*	35%	33%	31%	#	32%*	32%	47%*	29%	28%*
More than 1440 minutes	3%*	4%	6%	8%	#	3%*	5%	10%*	5%	4%*
Type of response from dealer to online request										
An email from an actual person	70%*	71%	73%	62%	#	64%*	48%	54%*	56%	60%*
A call from someone at the dealership	27%*	23%	21%	32%	#	29%*	45%	43%*	38%	37%*
An automated response	3%*	6%	3%	6%	#	7%*	5%	3%*	7%	3%*
Other	0%*	1%	2%	0%	#	0%*	2%	0%*	0%	0%*
Dealer response to requests for information										
Provided all the specific information I asked for	84%*	86%	83%	83%	#	86%*	77%	94%*	89%	88%*
Provided minimal information	15%*	14%	15%	15%	#	14%*	18%	6%*	8%	12%*
Did not provide the information I asked for	1%*	0%	1%	2%	#	0%*	5%	0%*	3%	0%*
Number of times in contact with dealer prior to visit										
Mean / Weighted Average (Based to Submitters)	3.6*	3.0	2.9	3.9	#	3.8*	2.8	4.6*	3.5	3.3*
Person responded to online request same person dealt with at dealer										
%Yes (Based to Submitters)	62%*	65%	59%	67%	#	77%*	62%	77%*	75%	77%*

**Caution: Small Sample Size*

#Note: Insufficient Sample Size

Make *(continued)*

	Mazda	Mercedes-Benz	Mercury	MINI	Mitsubishi	Nissan	Porsche	Ram	Scion	smart
Used Internet to help shop for new vehicle										
%Yes	90%	79%	69%	94%	78%	82%	89%	77%	78%	80%*
Submitted online purchase/price request to any dealer										
%Yes (Based to Total)	34%	20%	17%	26%	23%	24%	19%	20%	16%	17%*
%Yes (Based to AIUs)	38%	26%	24%	27%	29%	29%	22%	26%	21%	22%*
Got response from a dealer										
%Yes (Based to Submitters)	97%	97%	100%*	94%*	94%*	98%	99%*	98%*	98%*	#
Purchased vehicle from a dealer who responded to request										
%Yes (Based to Submitters)	65%	56%	50%*	65%*	55%*	52%	53%*	54%*	43%*	#
Type of information requested online										
Vehicle price quote	95%	86%*	#	82%*	96%*	91%	87%*	85%*	#	#
Vehicle availability	66%	60%*	#	54%*	61%*	60%	66%*	83%*	#	#
Product information	44%	60%*	#	67%*	52%*	39%	44%*	33%*	#	#
Other	3%	4%*	#	7%*	6%*	4%	0%*	3%*	#	#
Time taken by dealer to contact you after submitting online request										
Mean / Minutes	725	722*	#	949*	828*	682	923*	377*	#	#
Time taken by dealer to contact you after submitting online request (categories)										
60 minutes or less	29%	30%*	#	31%*	32%*	33%	16%*	36%*	#	#
61 - 720 minutes	34%	34%*	#	16%*	23%*	31%	33%*	51%*	#	#
721 - 1440 minutes	34%	31%*	#	43%*	40%*	32%	44%*	13%*	#	#
More than 1440 minutes	4%	5%*	#	10%*	5%*	4%	7%*	0%*	#	#
Type of response from dealer to online request										
An email from an actual person	76%	51%*	#	54%*	51%*	58%	62%*	41%*	#	#
A call from someone at the dealership	21%	43%*	#	38%*	45%*	37%	33%*	46%*	#	#
An automated response	3%	6%*	#	5%*	2%*	4%	6%*	13%*	#	#
Other	0%	0%*	#	3%*	2%*	1%	0%*	0%*	#	#
Dealer response to requests for information										
Provided all the specific information I asked for	83%	88%*	#	87%*	86%*	79%	77%*	97%*	#	#
Provided minimal information	17%	10%*	#	12%*	14%*	18%	23%*	2%*	#	#
Did not provide the information I asked for	0%	1%*	#	1%*	0%*	3%	0%*	1%*	#	#
Number of times in contact with dealer prior to visit										
Mean / Weighted Average (Based to Submitters)	3.2	4.1*	#	4.0*	3.0*	2.9	5.4*	3.5*	#	#
Person responded to online request same person dealt with at dealer										
%Yes (Based to Submitters)	69%	67%*	#	76%*	71%*	62%	79%*	66%*	#	#

**Caution: Small Sample Size*

#Note: Insufficient Sample Size

Make *(continued)*

	Subaru	Suzuki	Toyota	Volkswagen	Volvo
Used Internet to help shop for new vehicle					
%Yes	91%	65%	78%	87%	84%
Submitted online purchase/price request to any dealer					
%Yes (Based to Total)	32%	13%	26%	29%	25%
%Yes (Based to AIUs)	35%	19%	33%	33%	30%
Got response from a dealer					
%Yes (Based to Submitters)	97%	#	98%	99%	98%
Purchased vehicle from a dealer who responded to request					
%Yes (Based to Submitters)	60%	#	61%	64%	57%
Type of information requested online					
Vehicle price quote	89%	#	92%	89%	81%*
Vehicle availability	65%	#	61%	70%	73%*
Product information	36%	#	45%	42%	54%*
Other	4%	#	5%	4%	7%*
Time taken by dealer to contact you after submitting online request					
Mean / Minutes	795	#	768	742	1256*
Time taken by dealer to contact you after submitting online request (categories)					
60 minutes or less	22%	#	29%	40%	19%*
61 - 720 minutes	36%	#	33%	21%	25%*
721 - 1440 minutes	37%	#	33%	33%	42%*
More than 1440 minutes	5%	#	5%	6%	14%*
Type of response from dealer to online request					
An email from an actual person	78%	#	66%	70%	71%*
A call from someone at the dealership	14%	#	24%	24%	22%*
An automated response	6%	#	10%	5%	6%*
Other	2%	#	0%	1%	1%*
Dealer response to requests for information					
Provided all the specific information I asked for	80%	#	85%	87%	86%*
Provided minimal information	16%	#	12%	13%	14%*
Did not provide the information I asked for	4%	#	2%	0%	0%*
Number of times in contact with dealer prior to visit					
Mean / Weighted Average (Based to Submitters)	2.9	#	2.8	3.2	3.5*
Person responded to online request same person dealt with at dealer					
%Yes (Based to Submitters)	71%	#	52%	73%	74%*

**Caution: Small Sample Size*

#Note: Insufficient Sample Size

Segment

	Total	Compact Conventional	Compact CUV	Compact MPV	Compact Premium Conventional	Compact Premium CUV	Compact Premium Sporty
Used Internet to help shop for new vehicle							
%Yes	79%	79%	81%	79%	83%	88%	84%
Submitted online purchase/price request to any dealer							
%Yes (Based to Total)	24%	26%	25%	25%	28%	28%	25%
%Yes (Based to AIUs)	31%	33%	31%	32%	33%	32%	30%
Got response from a dealer							
%Yes (Based to Submitters)	97%	98%	98%	97%	98%	96%	97%
Purchased vehicle from a dealer who responded to request							
%Yes (Based to Submitters)	60%	62%	51%	60%	61%	60%	57%
Type of information requested online							
Vehicle price quote	90%	89%	95%	81%	90%	86%	83%*
Vehicle availability	63%	57%	55%	68%	62%	59%	59%*
Product information	42%	40%	39%	41%	46%	39%	36%*
Other	4%	6%	2%	4%	3%	4%	5%*
Time taken by dealer to contact you after submitting online request							
Mean / Minutes	730	753	900	683	767	950	997*
Time taken by dealer to contact you after submitting online request (categories)							
60 minutes or less	33%	34%	22%	33%	30%	25%	23%*
61 - 720 minutes	30%	26%	32%	35%	31%	28%	27%*
721 - 1440 minutes	32%	35%	37%	26%	33%	39%	40%*
More than 1440 minutes	5%	5%	9%	5%	5%	8%	10%*
Type of response from dealer to online request							
An email from an actual person	65%	69%	75%	52%	63%	65%	60%*
A call from someone at the dealership	28%	25%	20%	42%	31%	27%	37%*
An automated response	6%	5%	4%	5%	6%	7%	3%*
Other	1%	1%	1%	0%	0%	0%	0%*
Dealer response to requests for information							
Provided all the specific information I asked for	85%	85%	81%	86%	86%	86%	81%*
Provided minimal information	14%	12%	16%	14%	11%	14%	19%*
Did not provide the information I asked for	1%	3%	3%	0%	2%	0%	0%*
Number of times in contact with dealer prior to visit							
Mean / Weighted Average (Based to Submitters)	3.1	2.8	2.9	2.9	3.7	3.5	3.8*
Person responded to online request same person dealt with at dealer							
%Yes (Based to Submitters)	64%	63%	60%	75%	72%	68%	73%*

**Caution: Small Sample Size*

#Note: Insufficient Sample Size

Segment *(continued)*

	Compact Sporty	Compact Utility	Large Conventional	Large Pickup	Large Premium Conventional	Large Premium Sporty	Large Premium Utility
Used Internet to help shop for new vehicle							
%Yes	86%	81%	72%	75%	71%	75%*	77%
Submitted online purchase/price request to any dealer							
%Yes (Based to Total)	28%	23%	17%	20%	18%	8%*	21%
%Yes (Based to AIUs)	33%	28%	23%	27%	25%	11%*	27%
Got response from a dealer							
%Yes (Based to Submitters)	96%	98%	99%	98%	93%*	#	96%*
Purchased vehicle from a dealer who responded to request							
%Yes (Based to Submitters)	71%	60%	57%	59%	57%*	#	47%*
Type of information requested online							
Vehicle price quote	89%*	88%*	84%*	89%	#	#	85%*
Vehicle availability	64%*	73%*	68%*	71%	#	#	72%*
Product information	38%*	48%*	48%*	43%	#	#	57%*
Other	4%*	2%*	2%*	4%	#	#	4%*
Time taken by dealer to contact you after submitting online request							
Mean / Minutes	799*	624*	585*	522	#	#	638*
Time taken by dealer to contact you after submitting online request (categories)							
60 minutes or less	31%*	41%*	34%*	40%	#	#	36%*
61 - 720 minutes	30%*	25%*	36%*	35%	#	#	27%*
721 - 1440 minutes	33%*	31%*	28%*	21%	#	#	34%*
More than 1440 minutes	6%*	3%*	2%*	4%	#	#	3%
Type of response from dealer to online request							
An email from an actual person	63%*	63%*	66%*	57%	#	#	61%*
A call from someone at the dealership	26%*	28%*	29%*	33%	#	#	37%*
An automated response	8%*	8%*	5%*	8%	#	#	2%*
Other	3%*	0%*	0%*	2%	#	#	0%*
Dealer response to requests for information							
Provided all the specific information I asked for	83%*	84%*	82%*	89%	#	#	91%*
Provided minimal information	15%*	15%*	18%*	11%	#	#	9%*
Did not provide the information I asked for	1%*	1%*	0%*	0%	#	#	0%*
Number of times in contact with dealer prior to visit							
Mean / Weighted Average (Based to Submitters)	3.4*	3.9*	3.1*	3.3	#	#	4.3*
Person responded to online request same person dealt with at dealer							
%Yes (Based to Submitters)	74%*	74%*	65%*	66%	#	#	74%*

**Caution: Small Sample Size*

#Note: Insufficient Sample Size

Segment *(continued)*

	Large Utility	Midsize Conventional	Midsize CUV	Midsize Pickup	Midsize Premium Conventional	Midsize Premium CUV	Midsize Premium Sporty
Used Internet to help shop for new vehicle							
%Yes	81%	77%	83%	79%	79%	83%	87%
Submitted online purchase/price request to any dealer							
%Yes (Based to Total)	25%	20%	27%	26%	24%	26%	20%
%Yes (Based to AIUs)	31%	26%	32%	33%	30%	32%	23%
Got response from a dealer							
%Yes (Based to Submitters)	96%	97%	96%	99%	99%	95%	100%*
Purchased vehicle from a dealer who responded to request							
%Yes (Based to Submitters)	58%	63%	60%	64%	58%	62%	55%*
Type of information requested online							
Vehicle price quote	86%	93%	86%	89%	84%	91%	#
Vehicle availability	69%	56%	71%	71%	62%	65%	#
Product information	50%	42%	51%	38%	44%	49%	#
Other	6%	4%	3%	2%	3%	3%	#
Time taken by dealer to contact you after submitting online request							
Mean / Minutes	770	659	737	1030	781	845	#
Time taken by dealer to contact you after submitting online request (categories)							
60 minutes or less	31%	37%	31%	23%	31%	28%	#
61 - 720 minutes	32%	30%	30%	32%	33%	32%	#
721 - 1440 minutes	29%	29%	36%	32%	28%	30%	#
More than 1440 minutes	8%	4%	3%	12%	9%	10%	#
Type of response from dealer to online request							
An email from an actual person	58%	68%	62%	65%	62%	68%	#
A call from someone at the dealership	36%	24%	31%	31%	33%	28%	#
An automated response	5%	6%	7%	3%	5%	3%	#
Other	1%	2%	1%	1%	0%	0%	#
Dealer response to requests for information							
Provided all the specific information I asked for	89%	83%	87%	84%	85%	87%	#
Provided minimal information	10%	17%	12%	14%	12%	12%	#
Did not provide the information I asked for	1%	0%	1%	1%	3%	1%	#
Number of times in contact with dealer prior to visit							
Mean / Weighted Average (Based to Submitters)	4.5	2.8	3.1	2.9	3.2	3.8	#
Person responded to online request same person dealt with at dealer							
%Yes (Based to Submitters)	73%	54%	69%	67%	70%	68%	#

**Caution: Small Sample Size*
#Note: Insufficient Sample Size

Segment *(continued)*

	Midsize Premium Utility	Midsize Sporty	Midsize Utility	Midsize Van	Sub-Compact Conventional
Used Internet to help shop for new vehicle					
%Yes	80%	87%	84%	79%	78%
Submitted online purchase/price request to any dealer					
%Yes (Based to Total)	26%	28%	31%	29%	26%
%Yes (Based to AIUs)	32%	32%	37%	36%	34%
Got response from a dealer					
%Yes (Based to Submitters)	91%*	98%	98%	98%	96%
Purchased vehicle from a dealer who responded to request					
%Yes (Based to Submitters)	56%*	64%	56%	62%	63%
Type of information requested online					
Vehicle price quote	#	86%*	95%	92%	87%
Vehicle availability	#	69%*	68%	64%	70%
Product information	#	38%*	34%	37%	34%
Other	#	2%*	3%	2%	6%
Time taken by dealer to contact you after submitting online request					
Mean / Minutes	#	598*	707	698	694
Time taken by dealer to contact you after submitting online request (categories)					
60 minutes or less	#	45%*	33%	31%	29%
61 - 720 minutes	#	24%*	27%	27%	34%
721 - 1440 minutes	#	28%*	35%	42%	33%
More than 1440 minutes	#	4%*	4%	0%	3%
Type of response from dealer to online request					
An email from an actual person	#	61%*	66%	59%	54%
A call from someone at the dealership	#	35%*	31%	29%	39%
An automated response	#	2%*	2%	12%	6%
Other	#	1%*	0%	0%	1%
Dealer response to requests for information					
Provided all the specific information I asked for	#	84%*	90%	77%	81%
Provided minimal information	#	15%*	9%	21%	17%
Did not provide the information I asked for	#	1%*	1%	2%	2%
Number of times in contact with dealer prior to visit					
Mean / Weighted Average (Based to Submitters)	#	2.7*	3.3	2.9	2.6
Person responded to online request same person dealt with at dealer					
%Yes (Based to Submitters)	#	68%*	66%	58%	60%

**Caution: Small Sample Size*

#Note: Insufficient Sample Size

Shopping Process

	Total	AIU Yes	AIU No	Submitted request Yes	Submitted request No	Person responded to online request same person dealt with at dealer Yes	Person responded to online request same person dealt with at dealer No
Purchased from this dealer before							
Yes	35%	32%	48%	23%	35%	19%	23%
No	65%	68%	52%	77%	65%	81%	77%
What Influenced decision to visit dealership vehicle purchased from							
Prior experience with dealership sales department	37%	34%	47%	26%	38%	20%	23%
Recommendation from a friend, family member or colleague	27%	27%	29%	25%	28%	20%	19%
Prior experience with dealership service department	25%	23%	32%	18%	25%	14%	17%
Internet information or online referral	22%	28%	2%	41%	22%	55%	48%
Newspaper advertisement (of this dealer)	9%	9%	10%	7%	9%	5%	6%
Radio or TV advertising (by this dealer)	8%	8%	10%	7%	8%	7%	8%
Auto referral service or broker (AAA, credit union, etc.)	3%	3%	1%	6%	2%	8%	9%
Why choose to purchase from this dealer instead of other same make dealers							
Dealer treated me well	53%	52%	54%	51%	52%	55%	46%
Convenient location	40%	41%	39%	37%	42%	30%	42%
Offered me the best deal/lowest price	38%	40%	29%	54%	34%	62%	51%
Dealer had the exact vehicle (color, options, etc.) I wanted	31%	33%	21%	40%	30%	45%	41%
Dealer was able to get me financed	9%	9%	10%	10%	8%	12%	9%
No particular reason	6%	5%	9%	2%	6%	2%	4%
Dealer talked/pressured me into buying	2%	1%	2%	1%	1%	1%	1%
Knew exact vehicle wanted before visiting dealer							
Yes	60%	64%	47%	75%	59%	83%	79%
No	40%	36%	53%	25%	41%	17%	21%
Selecting your vehicle: Time spent							
Mean / Weighted Average	68.17	69.51	62.93	64.88	71.57	56.39	62.82
Selecting your vehicle: Time spent (categories)							
15 minutes or less	13%	13%	13%	18%	12%	24%	18%
16 - 30 minutes	21%	21%	23%	21%	20%	23%	23%
31 - 60 minutes	38%	38%	41%	35%	39%	31%	36%
61 - 120 minutes	19%	20%	18%	18%	20%	16%	16%
121 minutes or more	8%	9%	6%	8%	9%	6%	8%
Selecting your vehicle: Took too long							
Yes	3%	3%	3%	3%	3%	2%	3%
No	97%	97%	97%	97%	97%	98%	97%
Negotiating your deal: Time spent							
Mean / Weighted Average	53.4	53.92	51.35	55.99	53.01	48.13	63.58
Negotiating your deal: Time spent (categories)							
15 minutes or less	19%	20%	17%	24%	19%	34%	19%
16 - 30 minutes	30%	29%	34%	25%	30%	24%	22%
31 - 60 minutes	33%	33%	33%	30%	34%	25%	31%
61 - 120 minutes	13%	13%	13%	15%	12%	12%	19%
121 minutes or more	5%	5%	4%	7%	5%	6%	8%
Negotiating your deal: Took too long							
Yes	16%	16%	13%	19%	15%	13%	24%
No	84%	84%	87%	81%	85%	87%	76%
Between negotiating deal and beginning final paperwork: Time spent							
Mean / Weighted Average	44.62	44.62	44.63	47.35	43.35	45.39	51.53

Shopping Process *(continued)*

		AIU		Submitted request		Person responded to online request same person dealt with at dealer	
	Total	Yes	No	Yes	No	Yes	No
Between negotiating deal and beginning final paperwork: Time spent (categories)							
15 minutes or less	30%	30%	29%	30%	30%	33%	26%
16 - 30 minutes	30%	29%	31%	27%	30%	26%	28%
31 - 60 minutes	27%	27%	26%	27%	27%	26%	28%
61 - 120 minutes	10%	10%	10%	11%	9%	10%	12%
121 minutes or more	4%	4%	4%	5%	4%	5%	6%
Between negotiating deal and beginning final paperwork: Took too long							
Yes	23%	24%	18%	28%	23%	23%	32%
No	77%	76%	82%	72%	77%	77%	68%
Discussing/signing paperwork: Time spent							
Mean / Weighted Average	38.65	39	37.22	41.63	37.84	39.34	44.76
Discussing/signing paperwork: Time spent (categories)							
15 minutes or less	23%	22%	25%	22%	23%	24%	18%
16 - 30 minutes	41%	41%	42%	38%	42%	38%	36%
31 - 60 minutes	29%	29%	26%	31%	29%	28%	35%
61 - 120 minutes	7%	7%	6%	9%	6%	8%	9%
121 minutes or more	1%	1%	1%	1%	1%	1%	2%
Discussing/signing paperwork: Took too long							
Yes	15%	16%	13%	20%	15%	15%	25%
No	85%	84%	87%	80%	85%	85%	75%
Between completing the paperwork and delivery process: Time spent							
Mean / Weighted Average	29.77	29.21	31.98	31.12	28.34	29.55	34.69
Between completing the paperwork and delivery process: Time spent (categories)							
15 minutes or less	44%	45%	41%	43%	46%	46%	37%
16 - 30 minutes	31%	31%	32%	31%	31%	30%	34%
31 - 60 minutes	19%	19%	21%	20%	18%	18%	21%
61 - 120 minutes	4%	4%	5%	5%	4%	5%	6%
121 minutes or more	1%	1%	1%	1%	1%	1%	2%
Between completing the paperwork and delivery process: Took too long							
Yes	12%	12%	10%	14%	12%	11%	19%
No	88%	88%	90%	86%	88%	89%	81%
Taking delivery: Time spent							
Mean / Weighted Average	28.07	27.92	28.69	28.99	27.44	28.45	29.69
Taking delivery: Time spent (categories)							
15 minutes or less	43%	43%	42%	43%	44%	43%	43%
16 - 30 minutes	36%	36%	36%	35%	37%	36%	34%
31 - 60 minutes	17%	17%	18%	18%	16%	17%	20%
61 - 120 minutes	3%	3%	3%	3%	3%	3%	3%
121 minutes or more	1%	1%	0%	1%	0%	1%	1%
Taking delivery: Took too long							
Yes	5%	5%	4%	6%	5%	4%	11%
No	95%	95%	96%	94%	95%	96%	89%
Total time spent at dealer vehicle purchased from							
Mean / Weighted Average	246.21	247.96	239.32	252.4	245.96	231.35	266.5
Total time spent at dealer vehicle purchased from (categories)							
120 minutes or less	17%	16%	19%	18%	16%	25%	13%
121 - 180 minutes	20%	20%	20%	19%	21%	20%	15%
181 - 240 minutes	20%	20%	21%	20%	21%	18%	21%

Shopping Process *(continued)*

	Total	AIU Yes	AIU No	Submitted request Yes	Submitted request No	Person responded to online request same person dealt with at dealer Yes	Person responded to online request same person dealt with at dealer No
Total time spent at dealer vehicle purchased from (categories) - ***continued***							
241 - 300 minutes	15%	16%	15%	15%	16%	12%	18%
301 - 360 minutes	11%	11%	11%	10%	11%	8%	13%
361 minutes or more	16%	17%	14%	19%	16%	17%	19%
Level of sales pressure felt at dealer							
No pressure	78%	77%	83%	76%	78%	81%	69%
Some pressure	20%	21%	15%	22%	20%	18%	27%
Too much pressure	2%	2%	2%	2%	2%	1%	3%
Person(s) dealt with when negotiating for new vehicle							
I only dealt with one salesperson, who had to obtain authorization from his/her supervisor to close the deal	50%	51%	46%	49%	51%	47%	49%
I only dealt with one salesperson, who had total authority in deciding my deal	22%	21%	26%	23%	20%	32%	15%
I personally dealt with both salespeople and their manager(s)	19%	19%	18%	20%	19%	14%	24%
I personally dealt with two or more salespeople	6%	6%	6%	6%	6%	5%	10%
I only dealt with the manager	3%	3%	3%	3%	4%	2%	2%
Person at dealer responsible for helping sign final paperwork							
Finance or Business Manager	72%	74%	67%	75%	73%	77%	76%
My Salesperson	15%	14%	18%	14%	14%	14%	13%
Sales Manager	8%	8%	8%	7%	8%	5%	7%
Unsure	5%	5%	7%	4%	5%	4%	4%
Overall Rating: Experience working out the deal							
Mean / Weighted Average	7.32	7.25	7.57	7.12	7.31	7.52	6.72
Preferred way dealer demonstrates vehicle during delivery							
I prefer a detailed explanation of the vehicle during delivery	40%	40%	44%	39%	40%	39%	39%
I like a moderate explanation of the vehicle	43%	43%	40%	43%	43%	43%	41%
I like a brief explanation of the vehicle	17%	17%	16%	18%	17%	18%	20%
Time dealer staff spent with you during delivery process							
Did not spend enough time	8%	8%	6%	9%	7%	7%	12%
Just the right amount of time	89%	88%	91%	87%	89%	89%	83%
Too much time	4%	4%	3%	4%	3%	4%	5%
Total # of dealers rejected	**4.1**	**4.2**	**3.4**	**4.5**	**4.1**	**4.3**	**4.3**
Total # of other brand dealers visited	**3.7**	**3.7**	**3.2**	**3.9**	**3.7**	**3.7**	**3.7**
Reason why vehicle not purchased from this dealer							
Decided this make/model wasn't right for my needs	75%	77%	61%	75%	78%	72%	75%
Dealer's price was too high	64%	64%	62%	72%	60%	73%	79%
Dealer didn't have the exact vehicle I wanted in stock	55%	55%	50%	60%	53%	64%	52%
Decided this make/model was too expensive	41%	40%	44%	37%	42%	38%	35%
I just wasn't ready to buy when I was at this dealer	39%	38%	41%	32%	42%	26%	37%
Dealer wouldn't give a straight answer about price	35%	35%	35%	41%	31%	44%	38%
Dealer didn't offer enough for my trade-in	29%	28%	36%	28%	28%	29%	25%
Dealer staff applied too much sales pressure	27%	27%	27%	29%	26%	31%	26%
Dealer was too busy/did not focus enough attention on me	22%	23%	21%	25%	21%	24%	19%
Dealer was not completely honest with me	21%	21%	20%	25%	19%	28%	24%
Dealer staff was rude/not courteous	20%	21%	16%	24%	20%	25%	16%
Dealer staff didn't seem knowledgeable	18%	18%	17%	19%	18%	20%	16%
Dealer was not conveniently located	16%	17%	14%	17%	17%	16%	13%
Dealer was unable to provide adequate financing	12%	11%	20%	12%	11%	12%	13%

Shopping Process *(continued)*

	Total	AIU		Submitted request		Person responded to online request same person dealt with at dealer	
		Yes	No	Yes	No	Yes	No
Most influential reason why vehicle not purchased from this dealer							
Decided this make/model wasn't right for my needs	54%	56%	41%	55%	57%	53%	56%
Dealer's price was too high	27%	27%	26%	33%	24%	32%	39%
Dealer didn't have the exact vehicle I wanted in stock	27%	27%	26%	29%	26%	29%	27%
I just wasn't ready to buy when I was at this dealer	22%	22%	23%	18%	24%	13%	20%
Decided this make/model was too expensive	18%	18%	18%	16%	20%	17%	12%
Dealer didn't offer enough for my trade-in	9%	9%	13%	9%	8%	10%	10%
Dealer wouldn't give a straight answer about price	7%	8%	6%	10%	6%	11%	7%
Dealer staff was rude/not courteous	7%	7%	6%	8%	7%	8%	5%
Dealer staff applied too much sales pressure	7%	7%	7%	8%	6%	10%	7%
Dealer was too busy/did not focus enough attention on me	7%	7%	6%	7%	6%	6%	4%
Dealer was not completely honest with me	6%	6%	3%	7%	6%	8%	6%
Dealer was not conveniently located	5%	5%	4%	6%	5%	4%	7%
Dealer was unable to provide adequate financing	3%	3%	5%	3%	3%	3%	5%
Dealer staff didn't seem knowledgeable	3%	3%	3%	2%	3%	2%	3%
What influenced decision to visit dealer							
Prior experience with dealership sales department	62%	62%	67%	61%	62%	58%	55%
Internet information or online referral	48%	54%	9%	69%	45%	69%	71%
Prior experience with dealership service department	45%	45%	45%	45%	45%	48%	41%
Radio or TV advertising (by this dealer)	40%	39%	45%	37%	40%	33%	35%
Newspaper advertisement (of this dealer)	35%	34%	41%	32%	35%	27%	34%
Recommendation from a friend, family member or colleague	31%	30%	36%	27%	32%	24%	27%
Auto referral service or broker (AAA, credit union, etc.)	5%	5%	2%	9%	3%	12%	9%

J.D. POWER AND ASSOCIATES®

Turning Information Into Action®

About J.D. Power and Associates

J.D. Power and Associates is a global marketing information services company operating in key business sectors across a variety of industries, providing customer satisfaction research, market research, automotive forecasting, social media research, and performance improvement programs. Established in 1968, the company has been listening to consumers and business customers; analyzing their opinions and perceptions; and refining research techniques and study methodologies to offer some of the most advanced product quality, customer satisfaction, and tracking research available today. The company's quality and satisfaction measurements are based on responses from millions of consumers annually. J.D. Power and Associates is a business unit of The McGraw-Hill Companies.

For more information about J.D. Power's suite of products and services, e-mail information@jdpa.com or call 888.537.6937.

J.D. Power and Associates Services

Custom Continuous Research

J.D. Power and Associates conducts custom, proprietary research and customer satisfaction measurement and tracking with *Acutrend,™* a new tool that allows companies to continuously monitor the customer experience for your company in comparison to your competitors' companies. *Acutrend* combines real-time customer satisfaction data with J.D. Power customer satisfaction benchmark data for your industry, providing an unprecedented view of performance at the most detailed level of the customer experience and giving your company the information to make improvements that keep it competitive and profitable. *To learn more about Acutrend, please visit: jdpower.com/tracking*

Automotive Forecasting

The J.D. Power Automotive Forecasting team is comprised of statisticians, economists, and experts in demographics who combine their knowledge of consumer behavior with the latest statistical modeling techniques to measure and track the global automotive industry. The team leverages its consumer and forecasting databases to predict sales, production, powertrain configurations, demand for future technologies, product cycle plans, and trends in vehicle prices and contenting. *To learn more about Automotive Forecasting, please visit: jdpower.com/forecasting*

Mystery Shopping

J.D. Power and Associates' mystery shopping programs evaluate how consistently employees communicate their company's mission, vision, values, and brand promise, primarily through measuring sales and service process execution. To measure consistency across the customer experience, J.D. Power deploys mystery shoppers to assess their employees' performance across a range of identified customer touch points. This provides objective, highly actionable and tactical information that allows organizations to compare their performance with key competitors, better understand operational strengths and weaknesses, and develop strategies for improvements. *To learn more about mystery shopping programs, please visit: jdpower.com/mysteryshopping*

Power Information Network® (PIN)

The Power Information Network (PIN) provides clients across Canada and the United States with real-time automotive information, analysis, and decision-support tools to reduce risk exposure, improve marketing and remarketing effectiveness, and increase profitability. PIN automotive solutions are based on the collection and analysis of daily new- and used-vehicle retail transaction data. Details from these transactions are evaluated to create products that focus on key measures, including price, cost, profit, finance, lease, and trade-in values. *To learn more about PIN, please call 800.947.6988 or e-mail customersupport@powerinfonet.com or visit: jdpower.com/PIN*

Call Center Certification Programs

J.D. Power and Associates call center certification programs help consumers and B2B customers identify product and service providers that deliver an outstanding customer experience. To become certified, the client call center must meet or exceed the customer satisfaction benchmark established by the most recent J.D. Power and Associates customer satisfaction research study. Call centers that become certified may then have the opportunity to license the J.D. Power brand to enhance consumer recognition of their certification. *To learn more about call center certification programs, please visit: jdpower.com/certificationprograms*

Consulting

J.D. Power and Associates' consulting services assist clients in developing competitive advantages by helping them understand and integrate the Voice of the Customer into their strategic planning and operational activities. The methodologies employed are practical and proven, yielding measurable results and providing clients with assistance in developing and refining processes and products from concept through sales and service. *To learn more about consulting services, please visit: jdpower.com/consulting*

Social Media Strategic Listening Solutions

Consumers are providing businesses with more unprompted information than ever before. However, this immense amount of data presents new challenges. How does your business collect it, make it relevant, turn into profit, sort it, and turn it into action? J.D. Power and Associates brings you advanced social media research solutions that easily integrate into your existing research and surpasses the basic monitoring tools many companies use today. J.D. Power's solutions help you understand what's being said, who's saying it, how it compares with your competition, and what you should do about it. *To learn more about Social Media Intelligence, please visit: businesscenter.jdpower.com*