



# AUTOMOTIVE SERVICE REPORT

A Nationwide Survey of Vehicle Owners

**PART 1 OF 2**



13867 S Bangerter Pkwy #200  
Draper, UT 84020



(801) 492-9900



[www.AutoNetTV.com](http://www.AutoNetTV.com)

# Welcome to the AutoNetTV Automotive Service Report

The global COVID-19 pandemic has resulted in changes in consumer attitudes in many areas. AutoNetTV Media, Inc. and its customers wanted to understand the current attitudes of vehicle owner towards automotive service providers. Of specific interest is why consumers choose one provider over another, what offerings attract them to do business with a service facility as well as what helps retain their business. We also wanted to understand their perceptions of service recommendations and their feelings of trust in service professionals. We explored what actions or tools could be employed to increase customer trust in service recommendations.

AutoNetTV engaged Centiment, a Denver based research company, to survey 1,031 vehicle owners in the United States. Participants were over the age of 25 and routinely drive an automobile that

he or she personally owns. They were split evenly among male and female. Every state but North Dakota is represented by participants.

Prior to the survey, AutoNetTV polled a sampling of its service center customers for questions that they thought would be helpful in better understanding their customers and potential customers. Many of their questions were used in the survey.

This Part 1 release of the survey results covers questions related to consumer attitudes about service centers, including different facility types, and why they choose one facility over another.

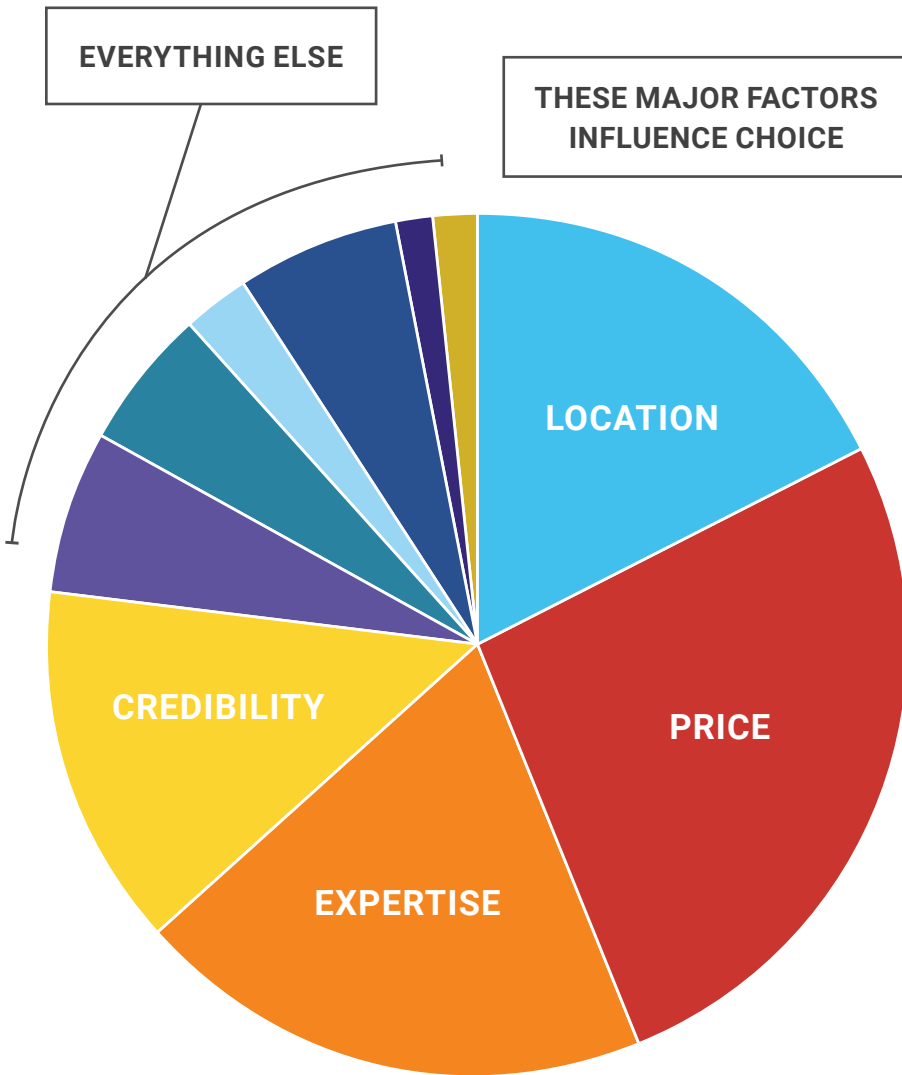
Part 2 release of results will cover questions related to consumer attitudes regarding Maintenance Services, their Trust in Recommendations, and How Service Professionals can Increase Both in their activities and/or interactions with vehicle owners.

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# #1: Choosing an Automotive Provider

When considering a specific automotive service provider to obtain your vehicle services (oil change, tire rotation, repairs, etc), what is the main reason you choose one provider over others?

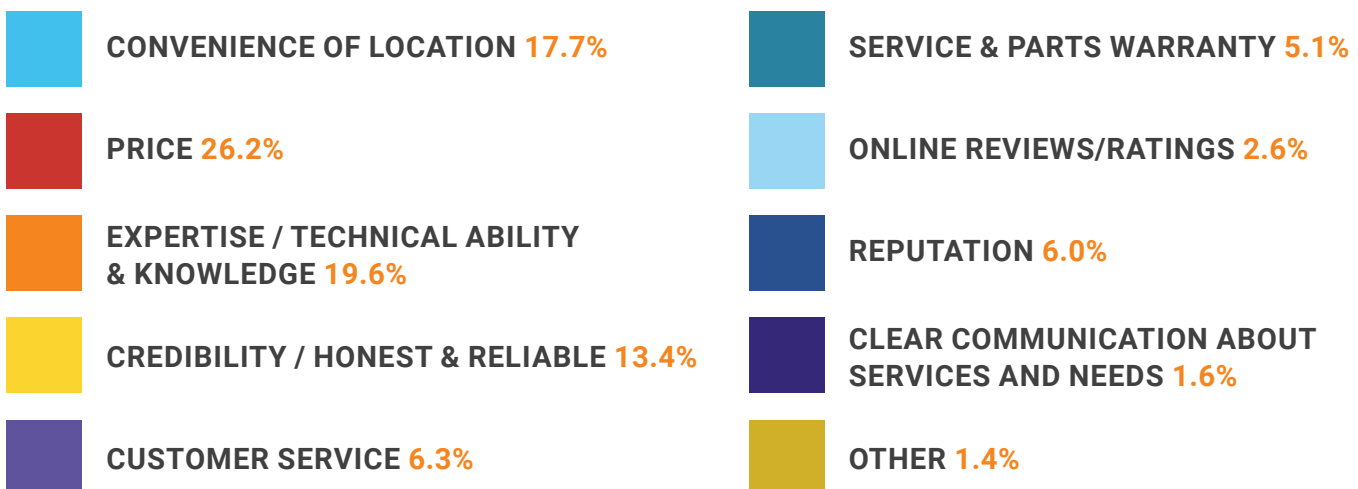


**T**he #1 criteria consumers used to select a service facility is price. Assuming a facility is following

best management practices, they are still subject to fixed infrastructure cost, buying power constraints, and the prevailing labor rates in their specific market. Their prices will reflect an acceptable profit margin, constraining the range in which pricing can be used to attract customers.

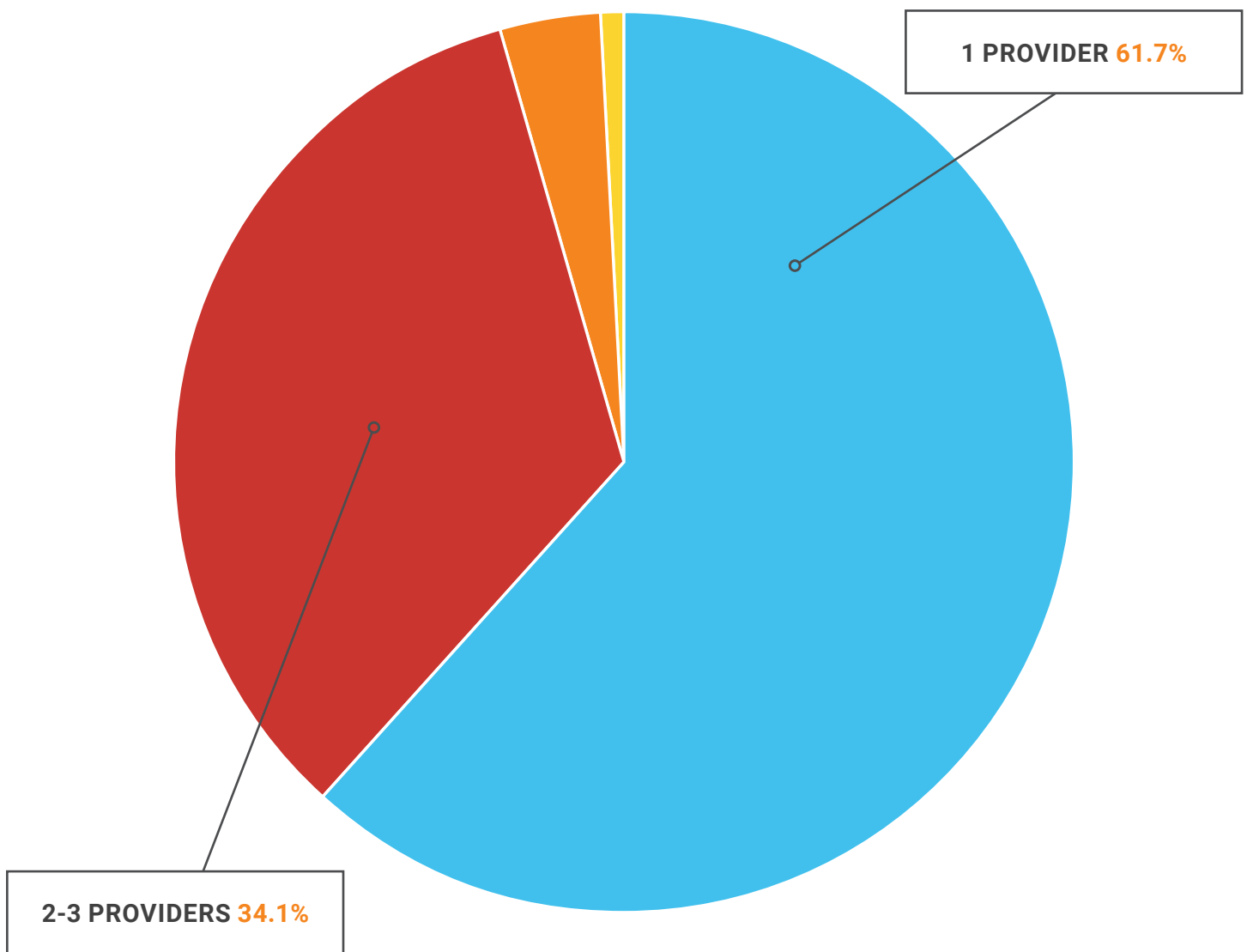
**The #2 reason** for choosing a location is expertise. This is something that can be developed, demonstrated, and communicated prospective customers. Communicating the same with current customers will allay concerns and strengthen their relationship.

**The #3 reason** is location. Service centers tend to draw their customers from a three-mile radius around their location—when they move, they will select a facility within an acceptable distance.



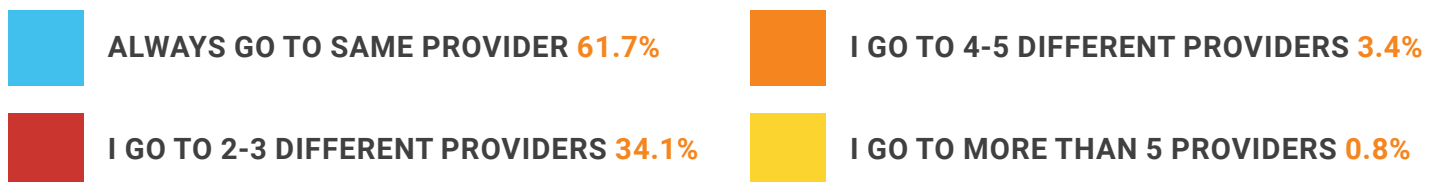
# #2: Service Providers **Frequented**

Which statement best describes how you service your vehicle?



**T**he survey found that **96% of consumers take their vehicles to three or fewer locations for all their service needs.** This seems to emphasize the importance of investing in customer satisfac-

tion through training (maintaining high levels of expertise) and customer communications that reinforce the reasons for doing business with their particular facility.



## “PLEASE RATE THE FOLLOWING ...”

**Q**uestion 3 probes how consumers value various offerings. Respondents rated a **parts and service warranty as the #1 offering** followed by having a complete range of services at one location. The #3 offering was Roadside Assistance, with a network of affiliated provider location coming in at #4. Peace of mind and convenience may be behind these selections.

The offerings valued the least were in-store fi-

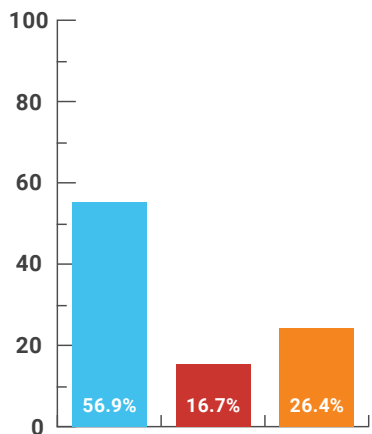
nancing (#9), shuttle or valet service (#8), and Touchless vehicle drop-off (#7). We anticipated that these offerings would have been more highly valued during the downturn and safety concerns related to COVID-19.

The top offerings can be obtained by individual facilities. Program or buying group affiliation often comes with regional or national warranty and service availability.

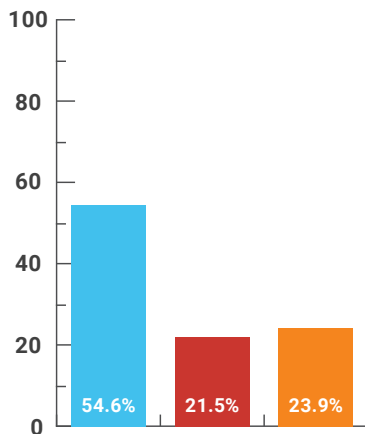


# #3: Importance of Facility Offerings

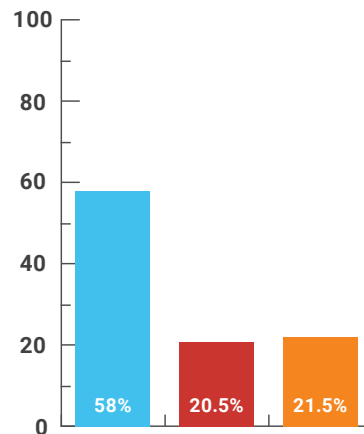
Please rate the following services, offerings, or benefits in terms of their value to you as a customer.



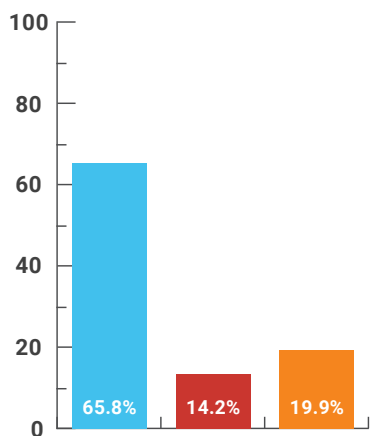
TOUCHLESS DROP-OFF/SERVICE



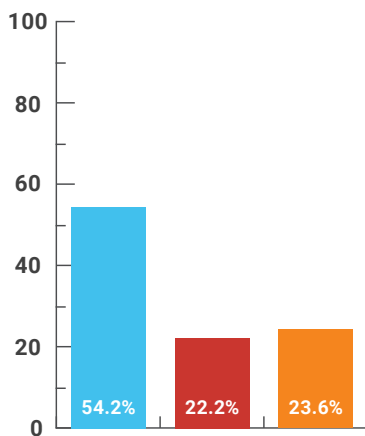
SHUTTLE OR VALET



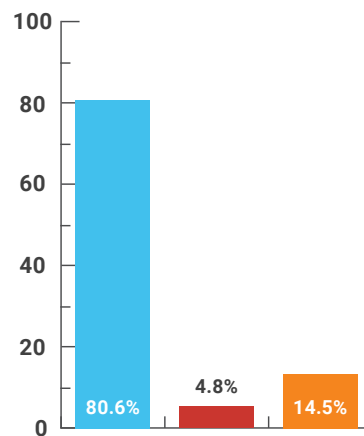
REWARDS/POINTS



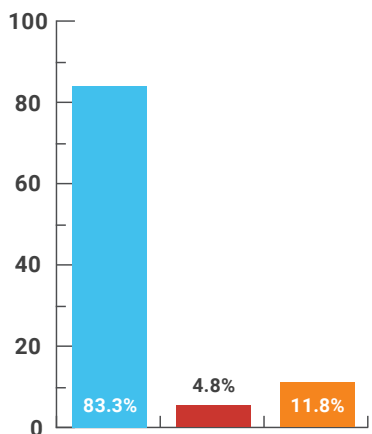
ONLINE SCHEDULING/CHECK-IN



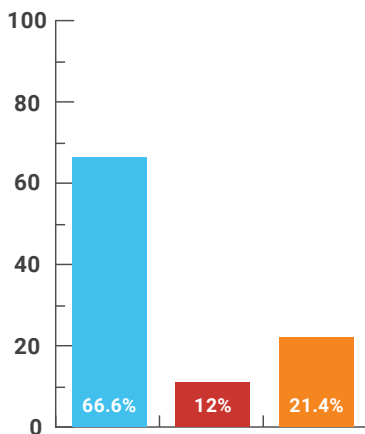
IN-STORE FINANCING/CREDIT



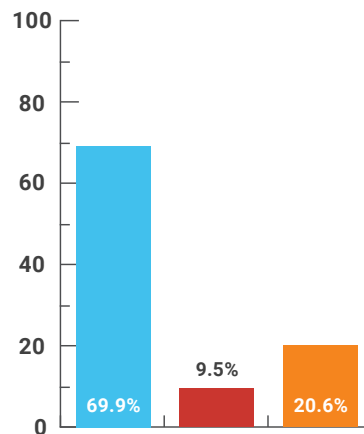
COMPLETE SERVICE, ONE PLACE



SERVICE/PARTS WARRANTY



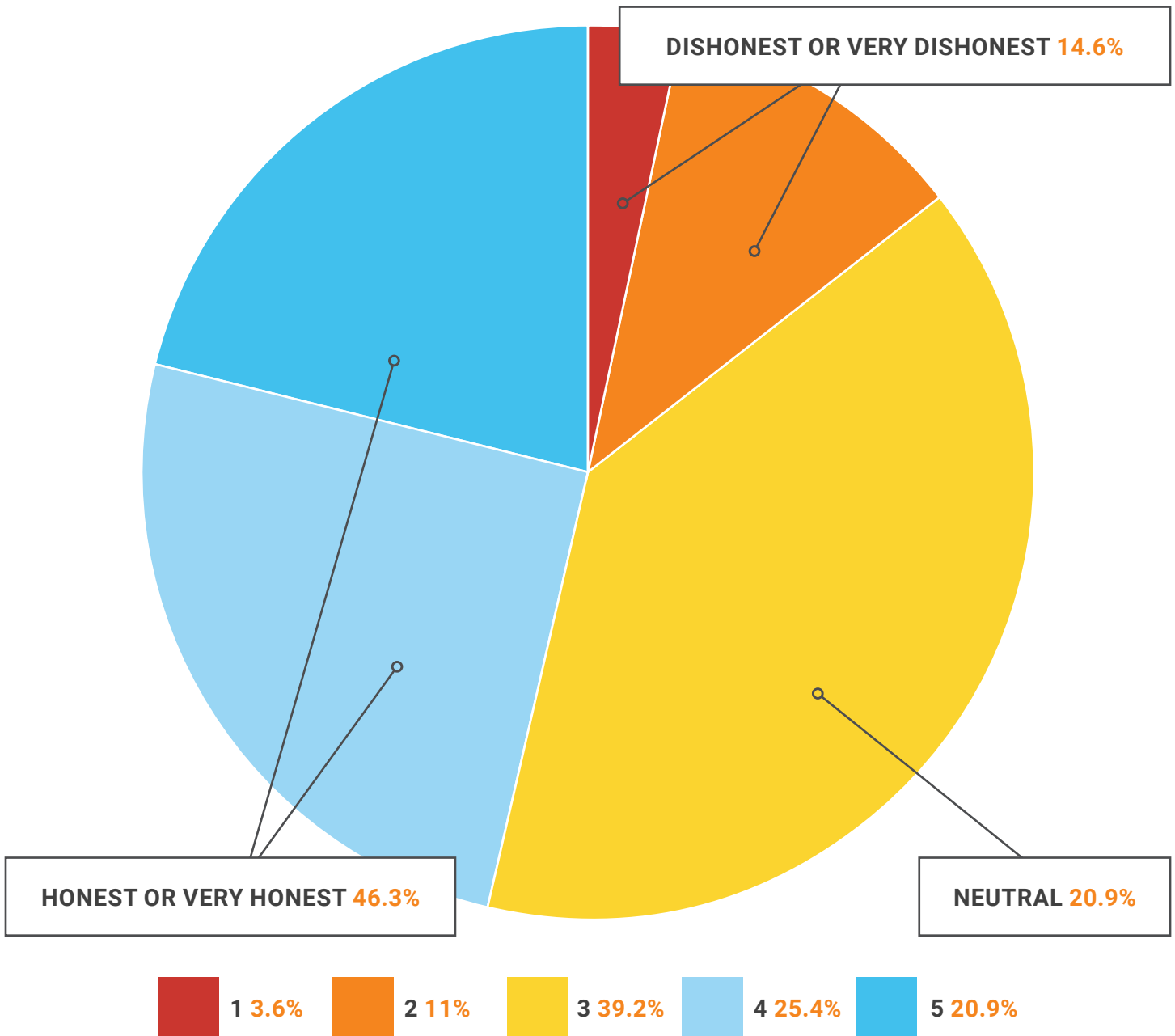
NATIONWIDE BRAND NETWORK



ROADSIDE ASSISTANCE

# #4: Honesty of Most Providers

How would you rate the honesty of most automotive service providers in the industry? Use a scale in which 1 represents the lowest level of honest and 5 represents the highest level of honesty.



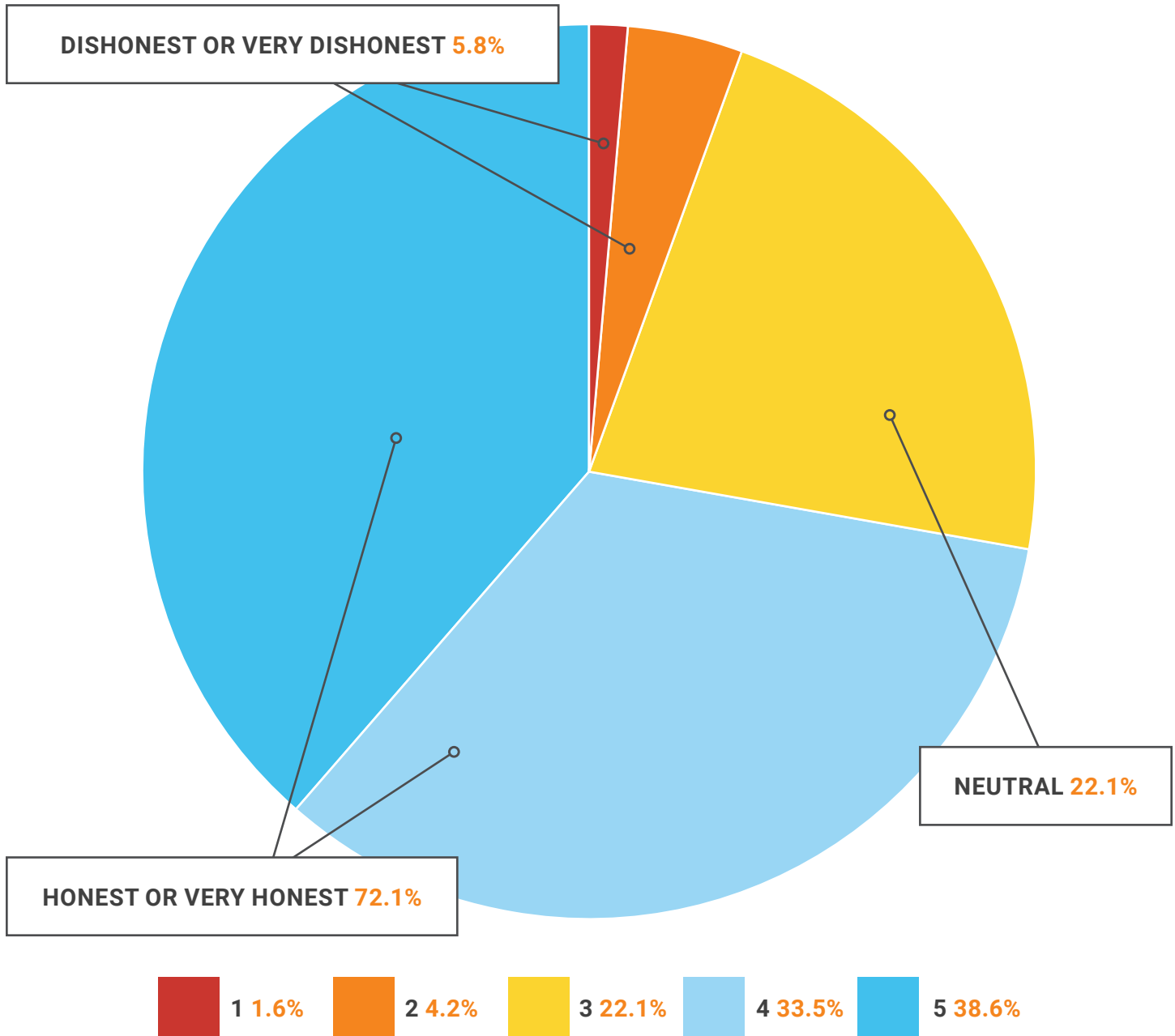
This question probes respondent's perception of the honesty of their preferred service provider. Less than 15% rated the automotive industry, as a whole, as having a Low or Very Low level

of honesty. The largest response was neutral at 39% revealing an opportunity to be positively influenced by the behavior of and communication with service professionals.



# #5: Honesty of Preferred Provider

How would you rate the honesty of your preferred automotive service provider? Use a scale in which 1 represents the lowest level of honest and 5 represents the highest level of honesty.



The percentage of responses rating the preferred service provider as having a Very high level of honesty is nearly double the same response for the industry as a whole. This reinforces the importance of behaving honestly as well as the impact of open and honest communications with

customers to building trust. As seen in the question above regarding the “loyalty” of customers, with 62% taking their vehicle to the same provider for all of their services, the perception of honest behavior by a service provider leads to greater customer retention and, therefore, more service business.

## “PLEASE RATE THE FOLLOWING ...”

In addition to asking vehicle owners to rank the considerations they had when choosing one location over another, we also wanted to see if consumers had different perceptions among the primary types of automotive service facilities: Quick Lubes, Repair Centers, Tire Centers, and new car Dealerships. **For Questions 6-9**, we provided a randomly chosen picture of each type of location to aid in identifying the type of service facility.

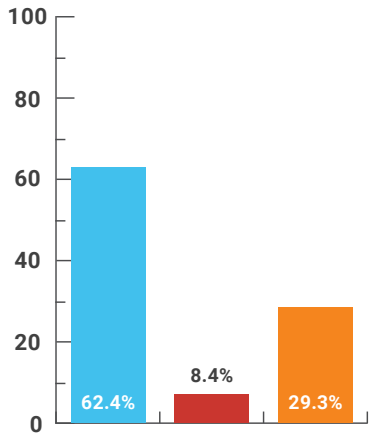
Dealerships received the highest number of Very Good (5) ratings in every category. When also including Good (4) ratings, new rankings emerge in

some areas. For Convenience, Quick Lubes (62.4%) edged out Dealerships (62.0%) for the top spot. For Price, Quick Lubes again take the top spot with 52.8%, with Tire Centers earning second place with 50.4%. Dealerships remain the top-rated location type for the remaining categories (when combining Good and Very Good ratings) for Expertise, Credibility, Customer Service, and Warranties. The less complex and less time consuming services typically offered at a Quick Lube facility likely impacted the consumers’ perception of Expertise and Warranty for those locations.

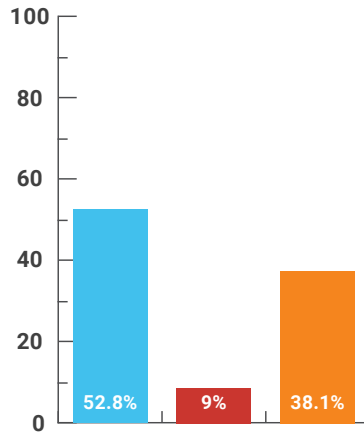


# #6: Quick Lube Attribute Ratings

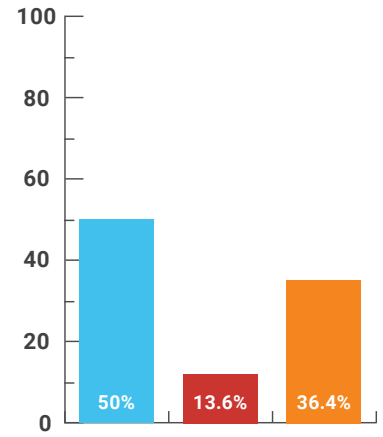
Please rate Quick Lubes on the following attributes.



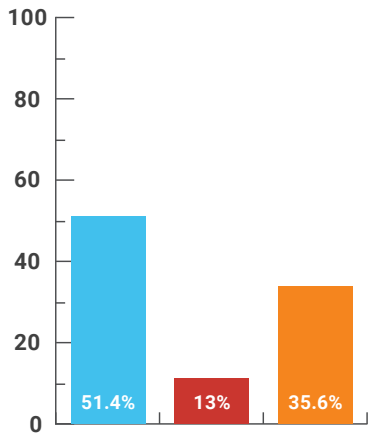
CONVENIENCE



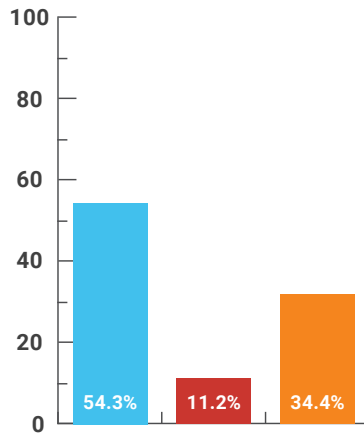
PRICE



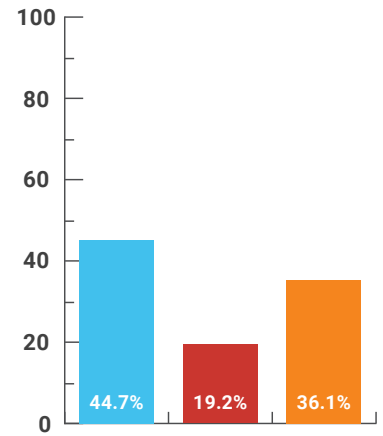
EXPERTISE



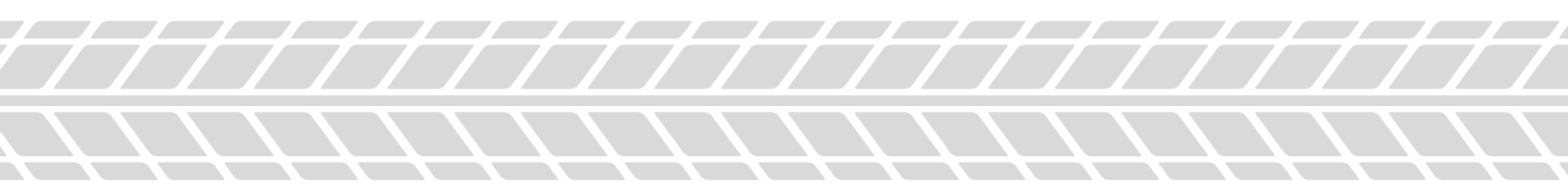
CREDIBILITY



CUSTOMER SERVICE

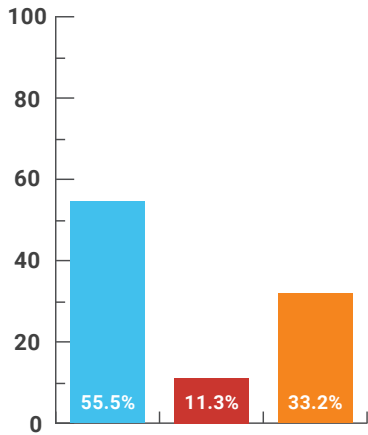


WARRANTIES

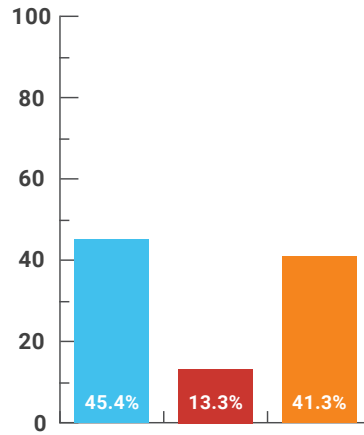


# #7: Repair Centers Attribute Ratings

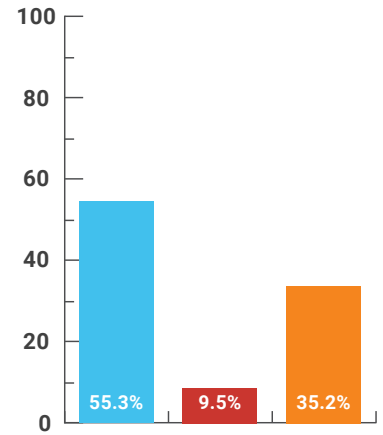
Please rate Repair Centers on the following attributes.



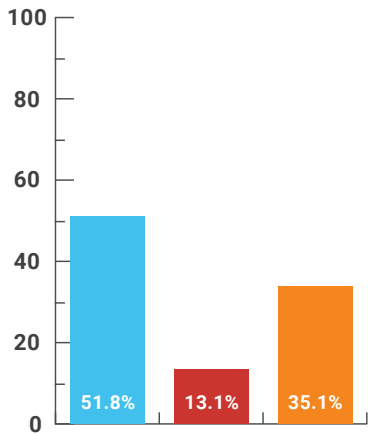
CONVENIENCE



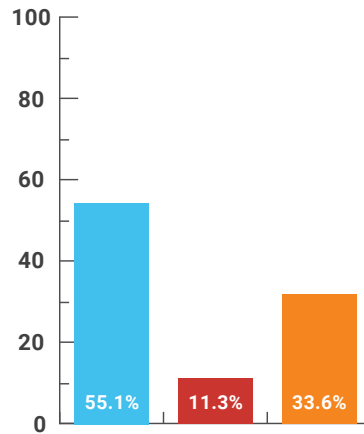
PRICE



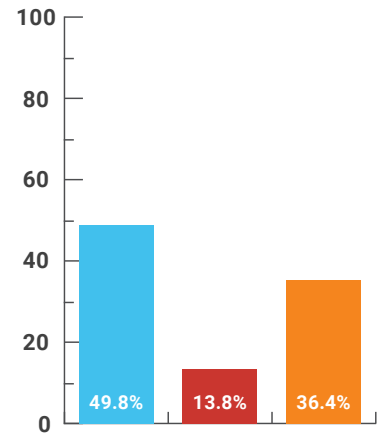
EXPERTISE



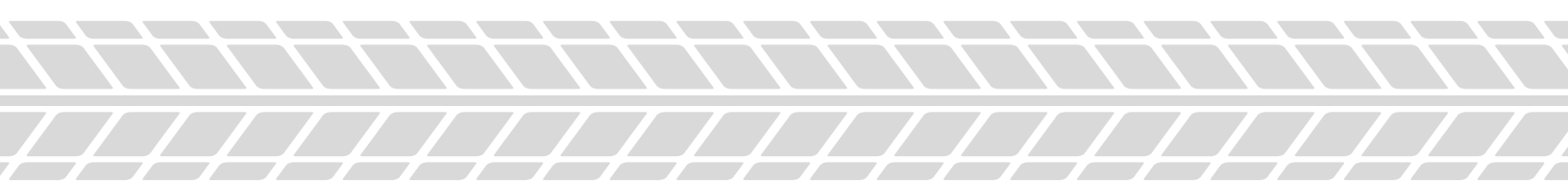
CREDIBILITY



CUSTOMER SERVICE

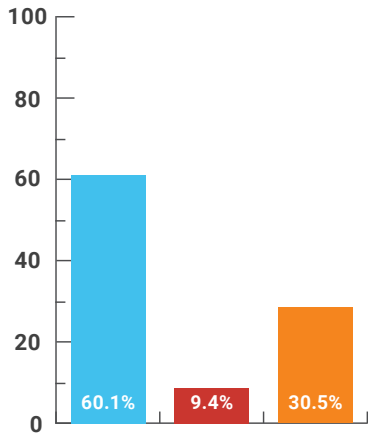


WARRANTIES

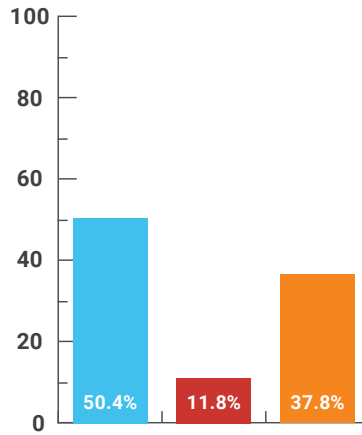


# #8: Tire Centers Attribute Ratings

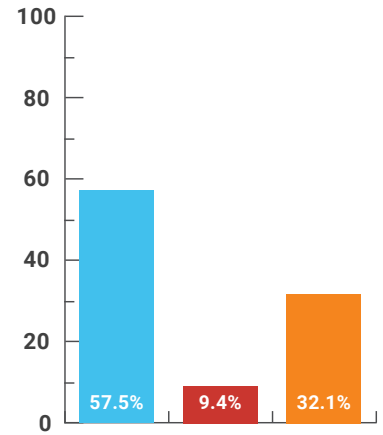
Please rate Quick Lubes on the following attributes.



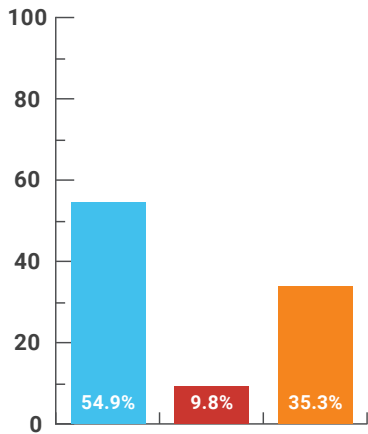
CONVENIENCE



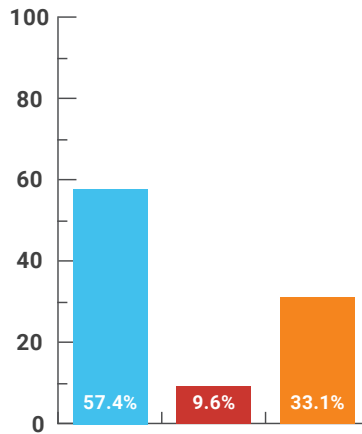
PRICE



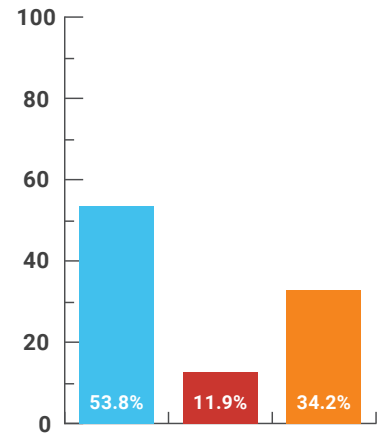
EXPERTISE



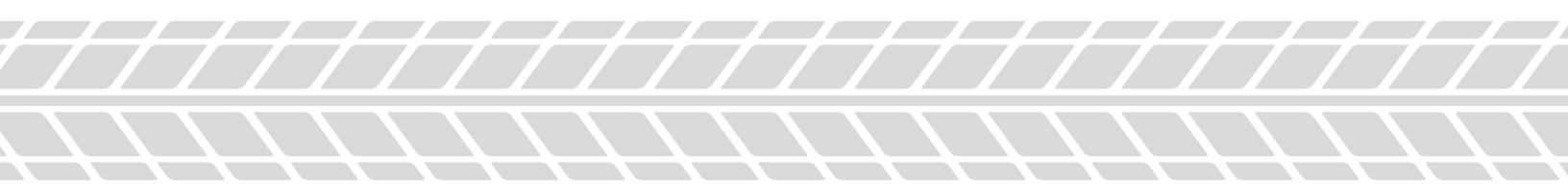
CREDIBILITY



CUSTOMER SERVICE

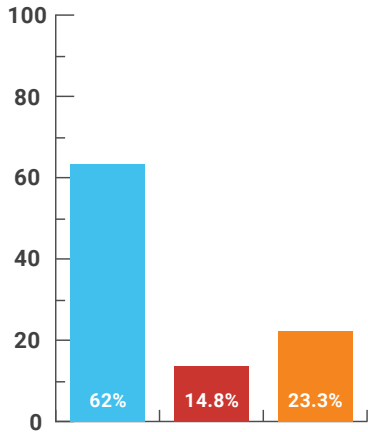


WARRANTIES

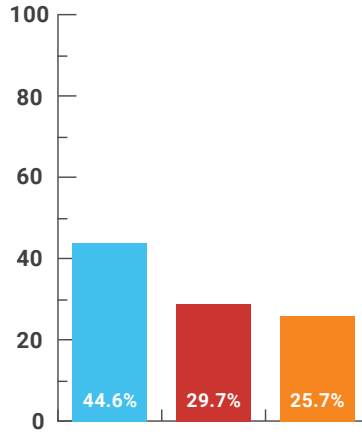


# #9: Dealerships Attribute Ratings

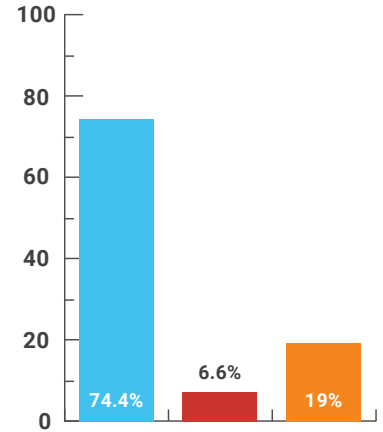
Please rate Dealerships on the following attributes.



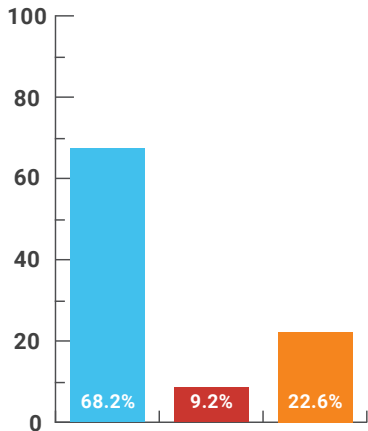
CONVENIENCE



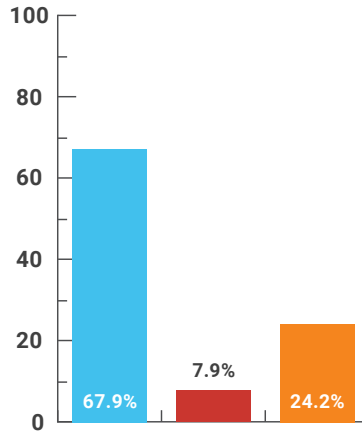
PRICE



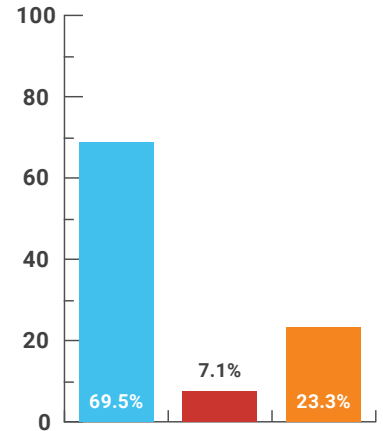
EXPERTISE



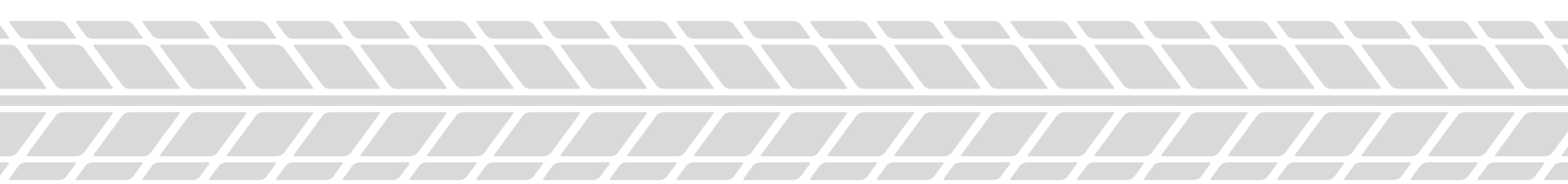
CREDIBILITY



CUSTOMER SERVICE



WARRANTIES



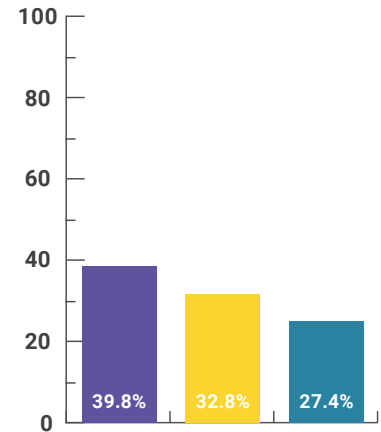
# #10: Trusted Source of Vehicle Advice

Rate the following sources in terms of their levels of trustworthiness in providing vehicle care advice.

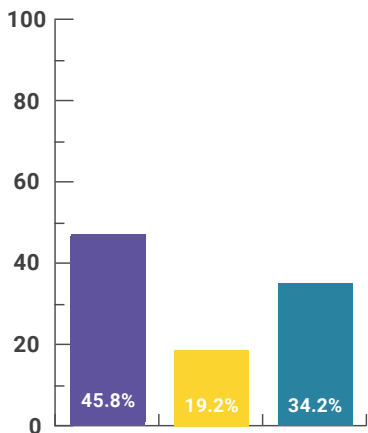


The percentage of customer responses that rate the preferred service provider as having a high level of honesty is nearly double the same response for the industry as a whole. This reinforces the importance of behaving honestly as well as the impact of open and honest communications with customers to

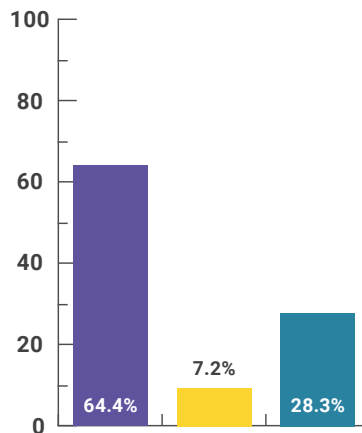
building trust. As seen in the previous question regarding the “loyalty” of customers, with 62 percent taking their vehicle to the same provider for all of their services, the perception of honest behavior by a service provider leads to greater customer retention and, therefore, more service business.



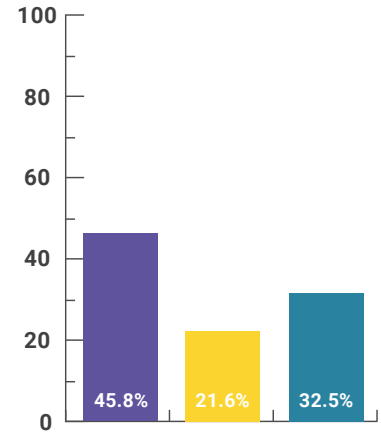
SOCIAL MEDIA



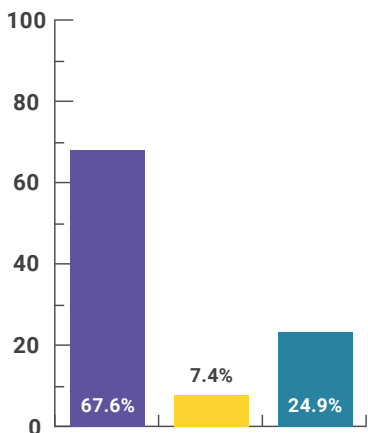
NEWS STORY OR ARTICLE



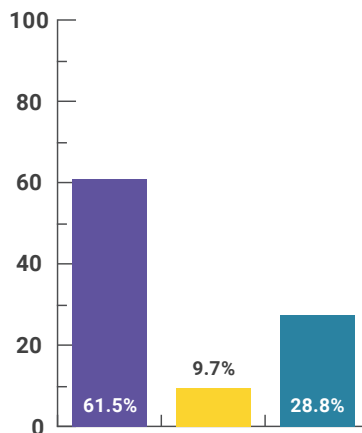
SERVICE ADVISOR / MECHANIC



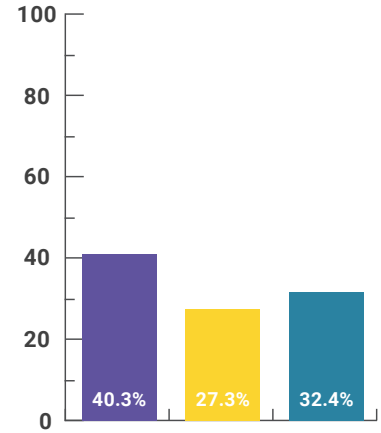
YOUTUBE VIDEO



FAMILY MEMBER OR FRIEND

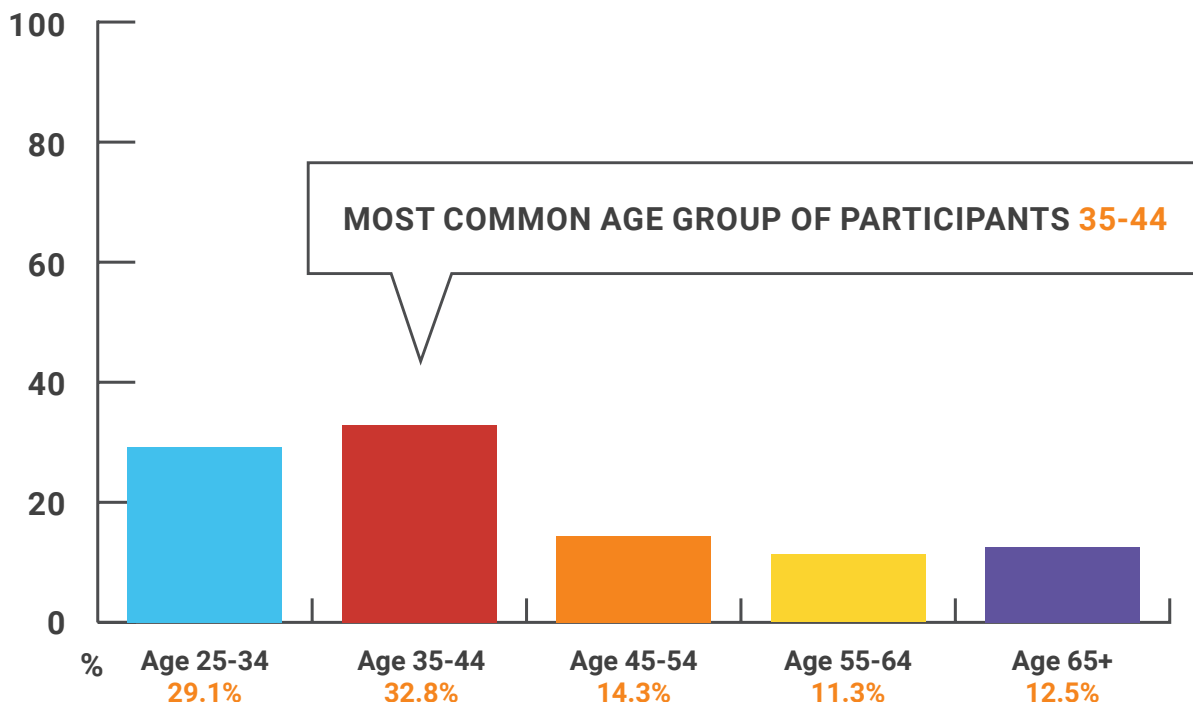


ONLINE RESEARCH / SOURCES

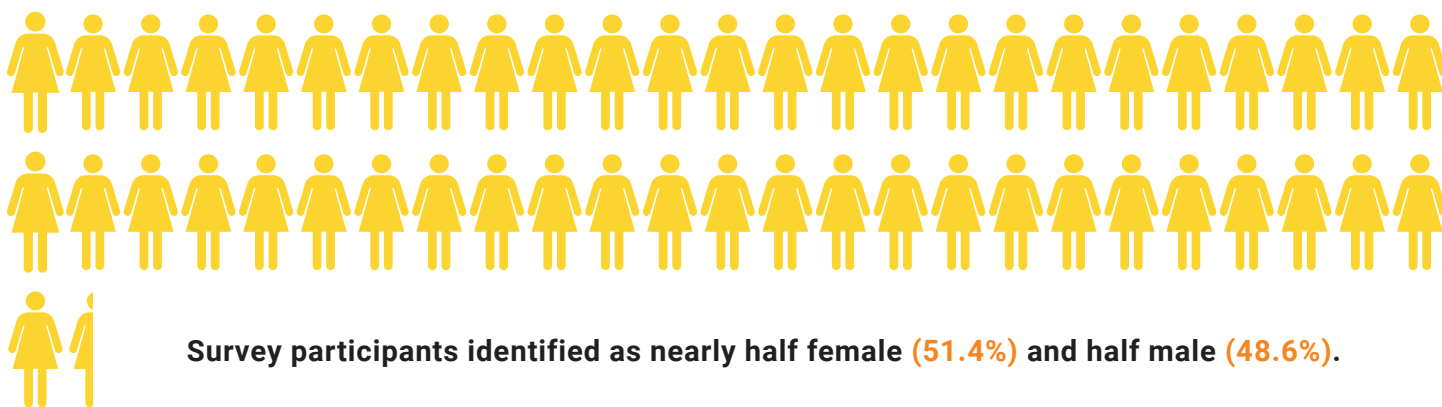


TV ADS

# What is Your Age Range?

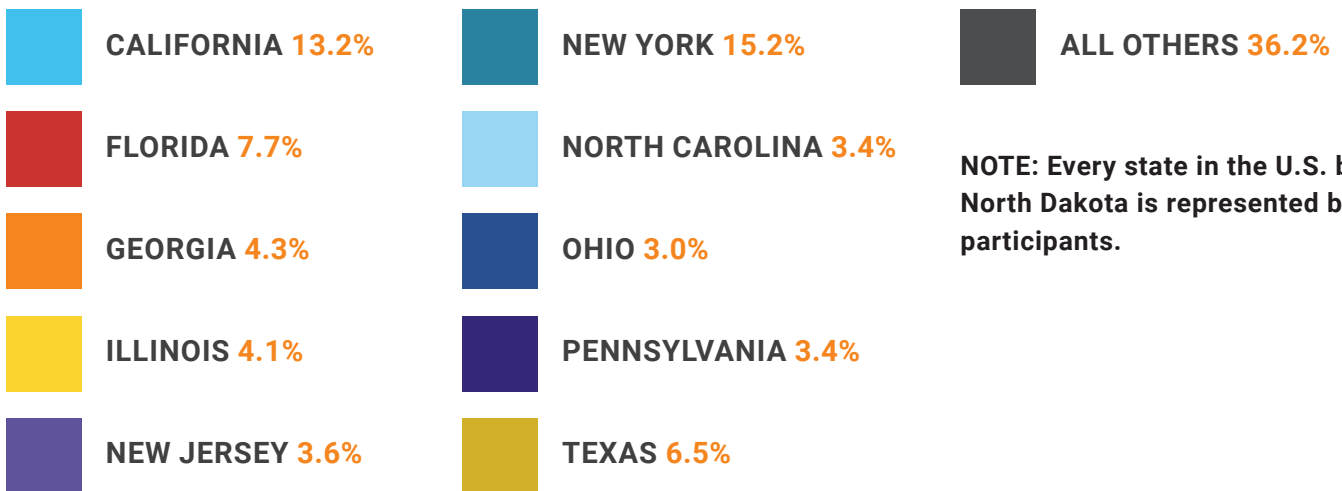
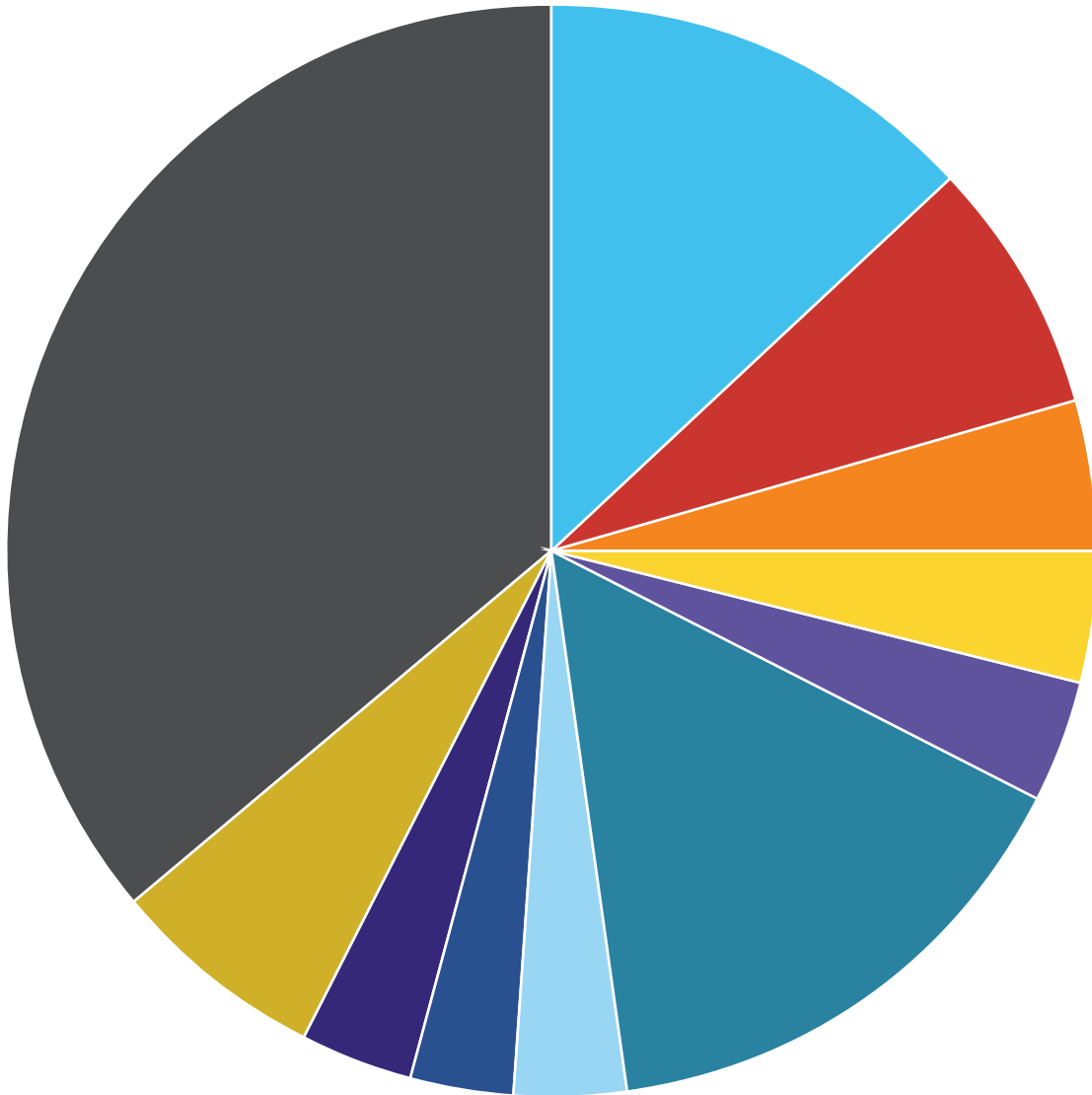


# With Which Gender Do You Identify?





# In Which State Do You Live?



## Automotive Service Report

August 2020 nationwide survey of vehicle owners within the United States, part one of two.

