



AUTOMOTIVE SERVICE REPORT

A Nationwide Survey of Vehicle Owners

PART 2 OF 2



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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 owners 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 2 of the survey results focuses on consumer attitudes on Maintenance Services, trust in Recommendations they receive, and what Service Professionals can do to improve both.

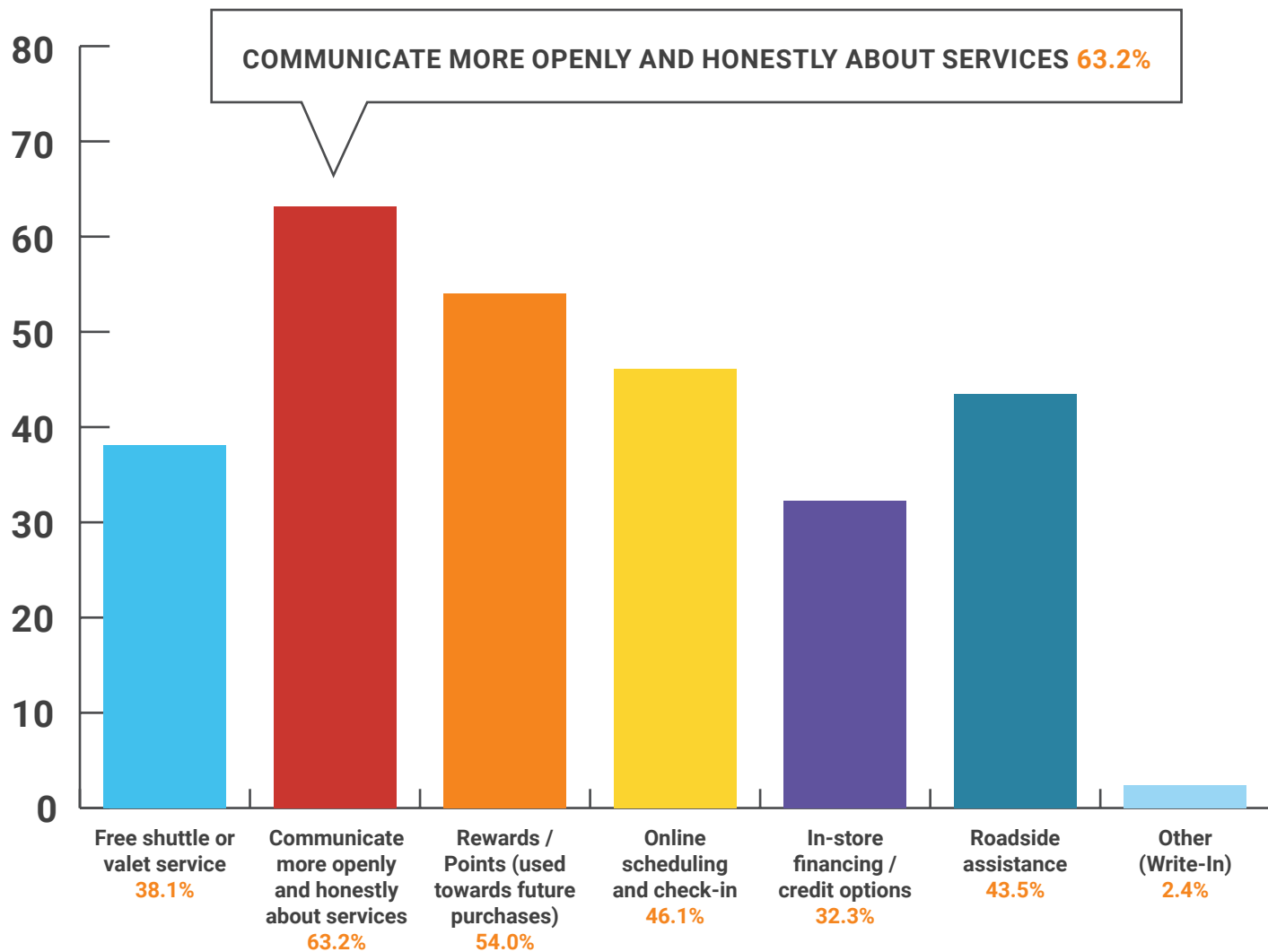
Part 1 release of the survey results covers questions related to consumer attitudes about service centers, including different facility types, and why they choose one facility over another.

TABLE OF CONTENTS

Question #1: How Providers Can Earn Loyalty	04
Question #2: What Prevents Regular Servicing	05
Question #3: Reminders to Obtain Services	06
Question #4: Effective Provider Communication	07
Question #5: Response to Provider Advice	08
Question #6: Mistrusting Recommendations	09
Question #7: How Advisors Can Improve Trust	10
Question #8: How Knowledge Affects Comfort	11
Question #9: Offer Better Information	12
Question #10: Comfort in Increased Knowledge	12
Question #11: Motivation for Maintenance	14
Question #12: Presentation Effect on Clarity	17
Questions #13-#15: Effectiveness of AutoNetTV Video	18
Question #16: Helpfulness of Video Aids	22

#1: How Providers Can Earn **Loyalty**

What can automotive service providers do to earn more loyalty and repeat business from you? Please select all that apply.



This question focuses on specific things service providers can do to earn more loyalty and repeat business from their customers. The option included several tangible things such as offering a Free Shuttle or Online Scheduling as well as the intangible option of “Communicate more openly and honestly about services.” Sixty-three percent of respondents chose this communication option (making it the #1 answer) as being important to earning more of their business.

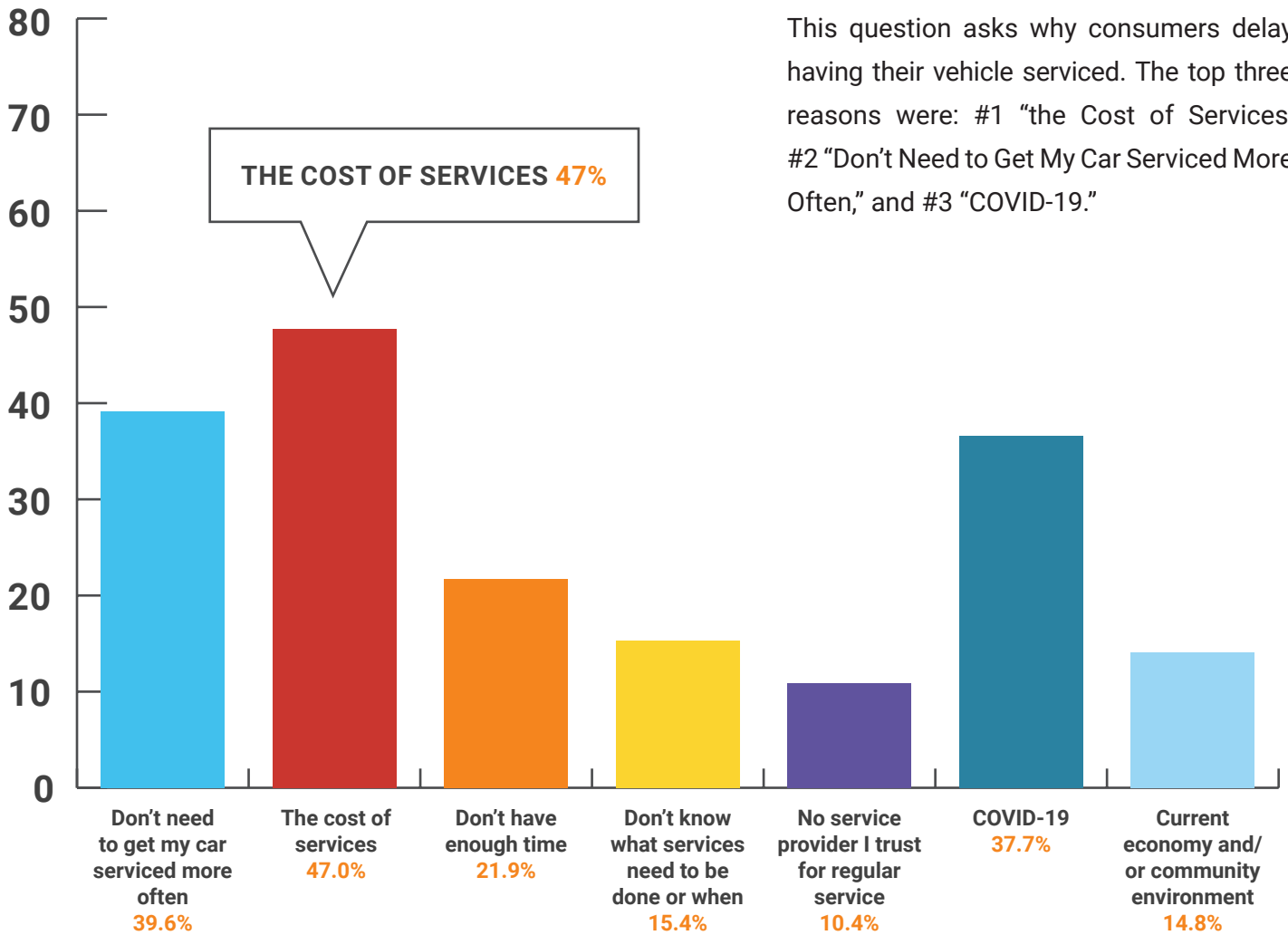
“Write-in” responses often reinforced the appropri-

ate communication theme: “Pleasant staff that resists talking down to me when they learn how little I know about cars.” “Honest advice regarding repairs.” “Customers don’t want to leave and feel ripped off.”

Research studies, and common practice, have consistently demonstrated the tie between improved communication and increased trust. This, as with other studies, reinforces the importance of providing more information about the service process, business practices, and vehicle service and repair recommendations.

#2: What Prevents Regular Servicing

What stops you from taking your vehicle(s) to be serviced more regularly? Please select all that apply.



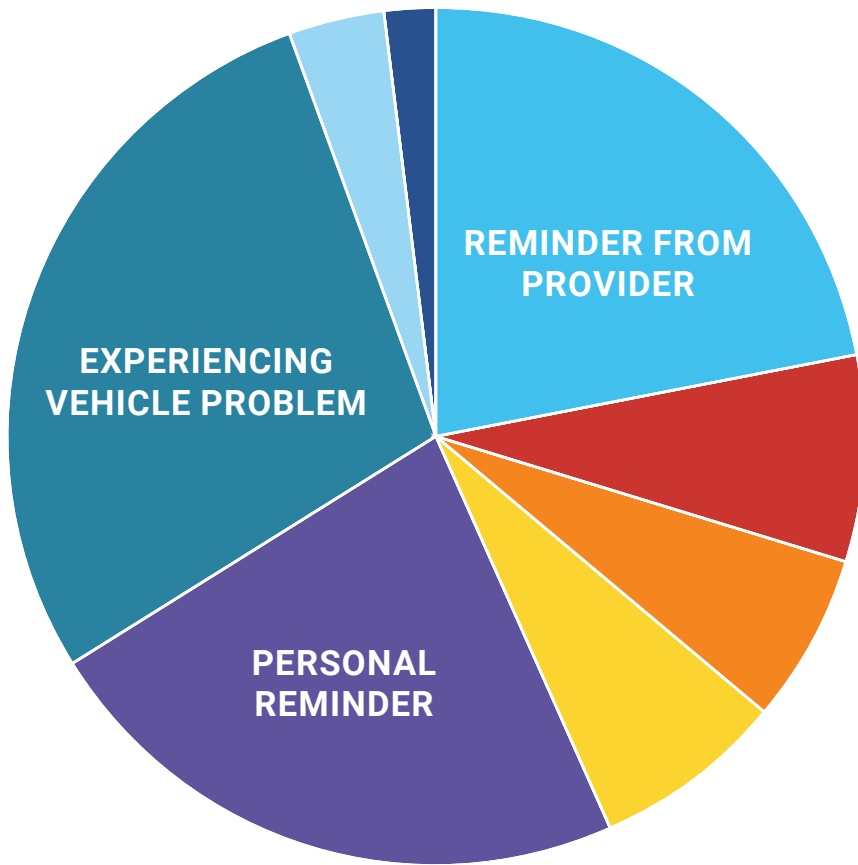
This question asks why consumers delay having their vehicle serviced. The top three reasons were: #1 "the Cost of Services," #2 "Don't Need to Get My Car Serviced More Often," and #3 "COVID-19."

All three most common responses may tie in with the pandemic because of economic pressures, driving fewer miles, and health and safety concerns. However, #2 (at 39.6%) also represents a customer education opportunity. Numerous studies by the Car Care Council have shown the vast majority of vehicles on the road have at least one unperformed maintenance or repair need. One of the reasons is that vehicle owners are unaware of their actual vehicle needs and recommended service intervals.

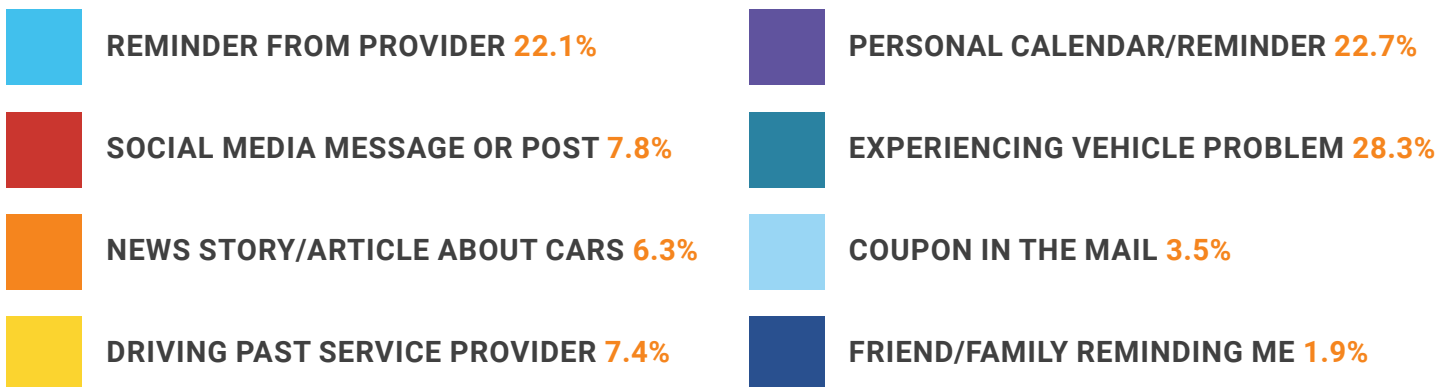
This is reinforced by our survey in which 15% say they "Don't Know What Services Need to be Done or When." This represents a great opportunity to obtain additional service work by communicating general vehicle service needs as well as customer-specific needs more openly and effectively. Perhaps some of this communication can focus on the cost benefits of proper vehicle maintenance, potential repair costs arising from neglected service and preserving the resale value of the vehicle.

#3: Reminders to Obtain Services

What is the #1 thing that usually prompts you to obtain services for your vehicle?

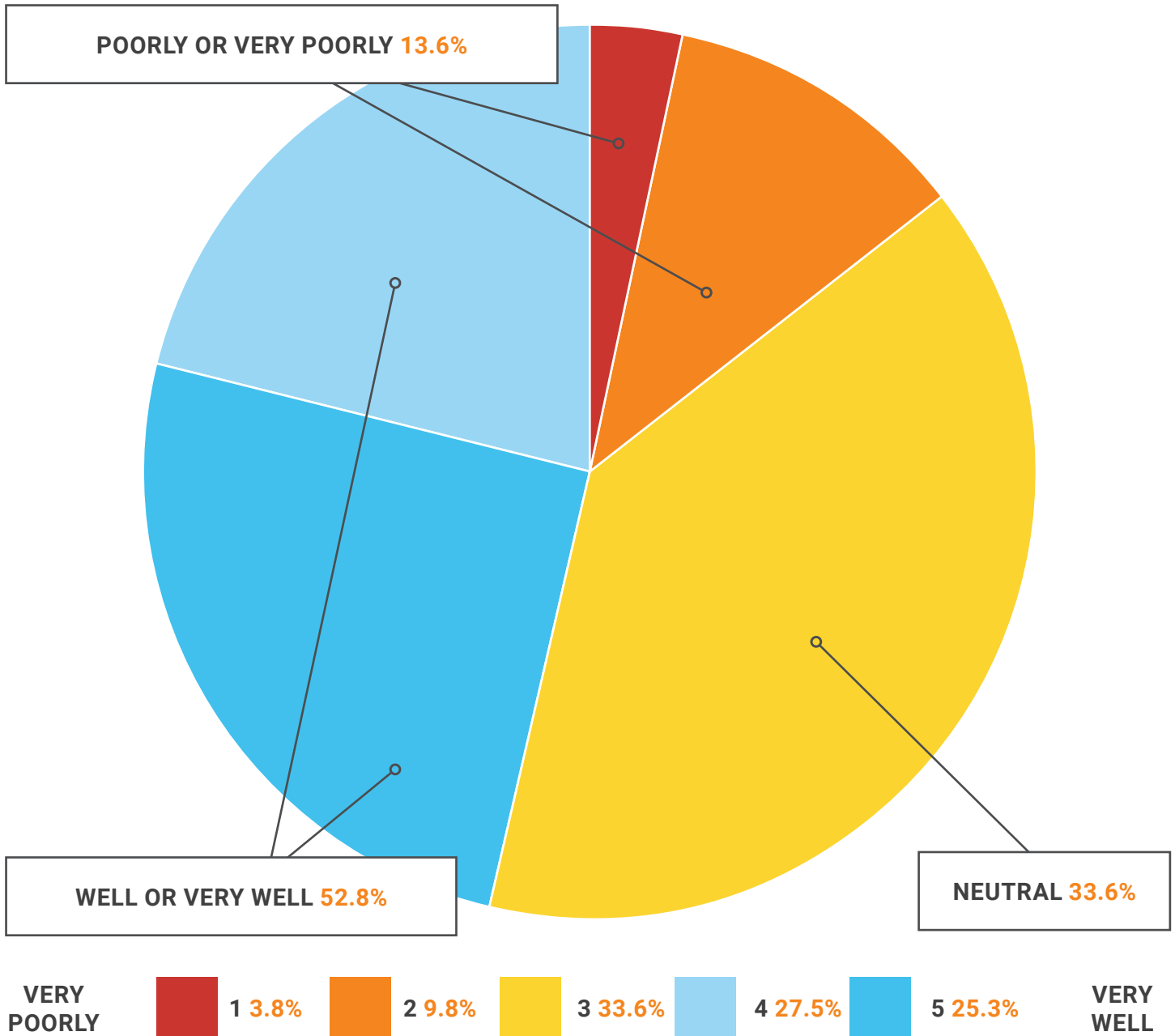


This question asks what prompts respondents to obtain services. The #1 answer, at 28.3%, is “Experiencing an Issue or Problem with their Vehicle. Next were “Email or other Reminders from Service Providers” (22.1%). This is significant because the service provider directly controls the quality and frequency of the messages they send to invite customers into their service bays for needed work. As underscored by previous questions (regarding building loyalty and getting a vehicle serviced more frequently) the facility can increase revenue with communication that empowers the customer with needed information to make a confident decision to obtain recommended maintenance services.



#4: Effective Provider Communication

Using a scale of 1 to 5, where 1 is VERY POORLY and 5 is VERY WELL, please rate how well you feel **most** automotive service providers communicate and explain vehicle needs and services.

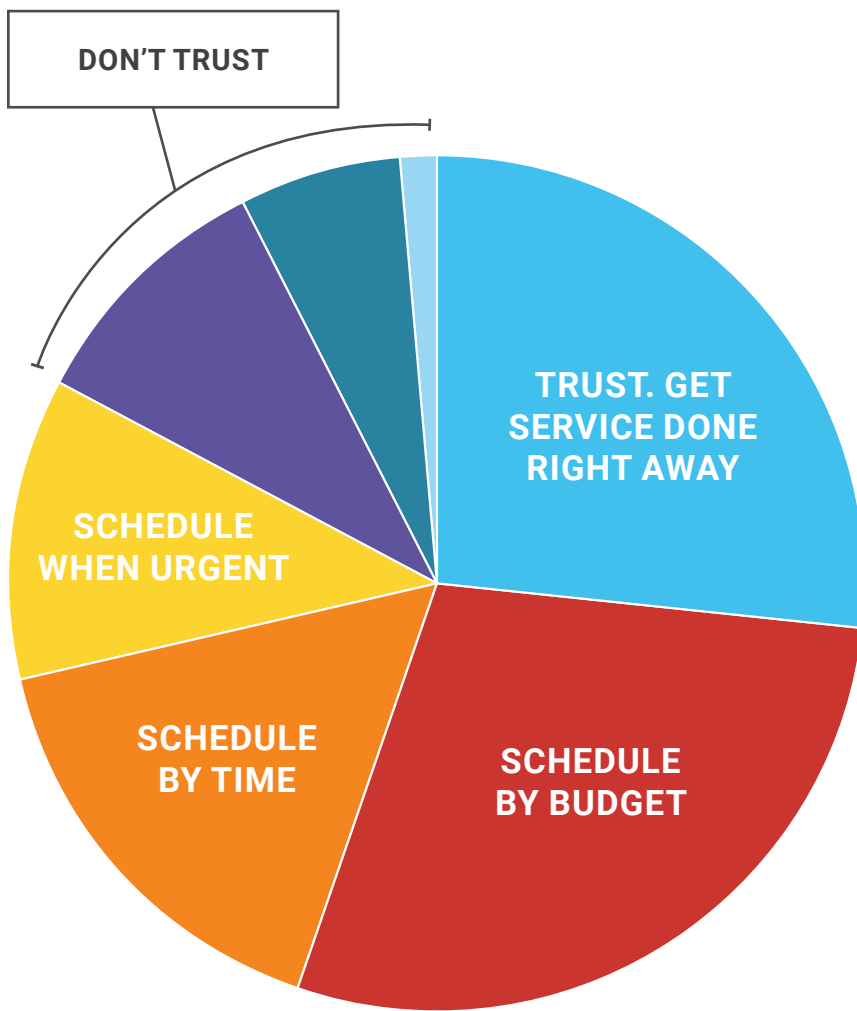


When asked how well service providers communicate and explain vehicle services and needs, the #1 option selected was neutral—chosen by 33.6% of

responses. But a combined rating of 52.8% for those who chose Well or Very Well reflects a very positive light on the professionals who interact with vehicle owners.

#5: Response to Provider Advice

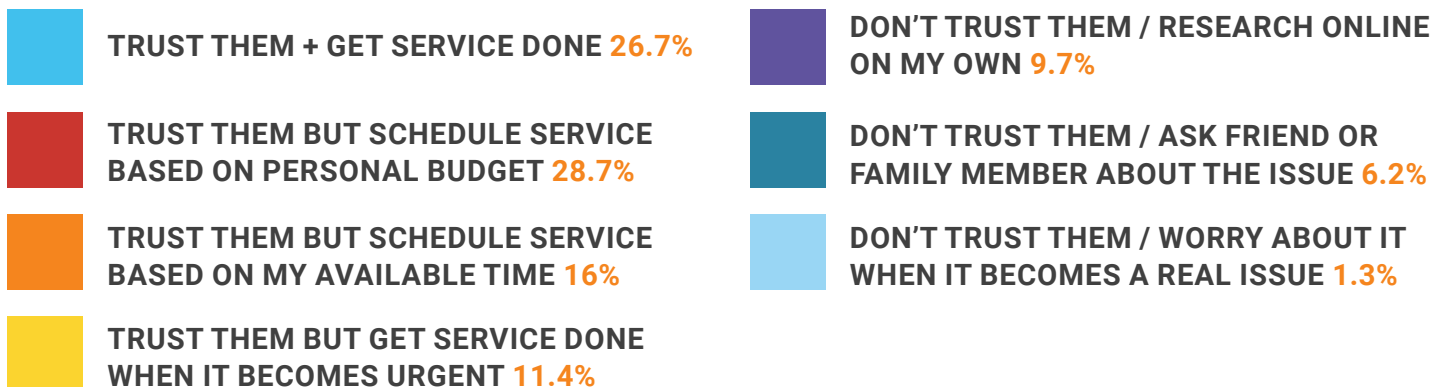
When a Mechanic or Service Advisor employee recommends certain services for your vehicle, what is your typical response?



The overwhelming majority (82.8%) on this question indicated that they trust the advisor. This reflects positively on the industry and contrasts with the perception often portrayed in news.

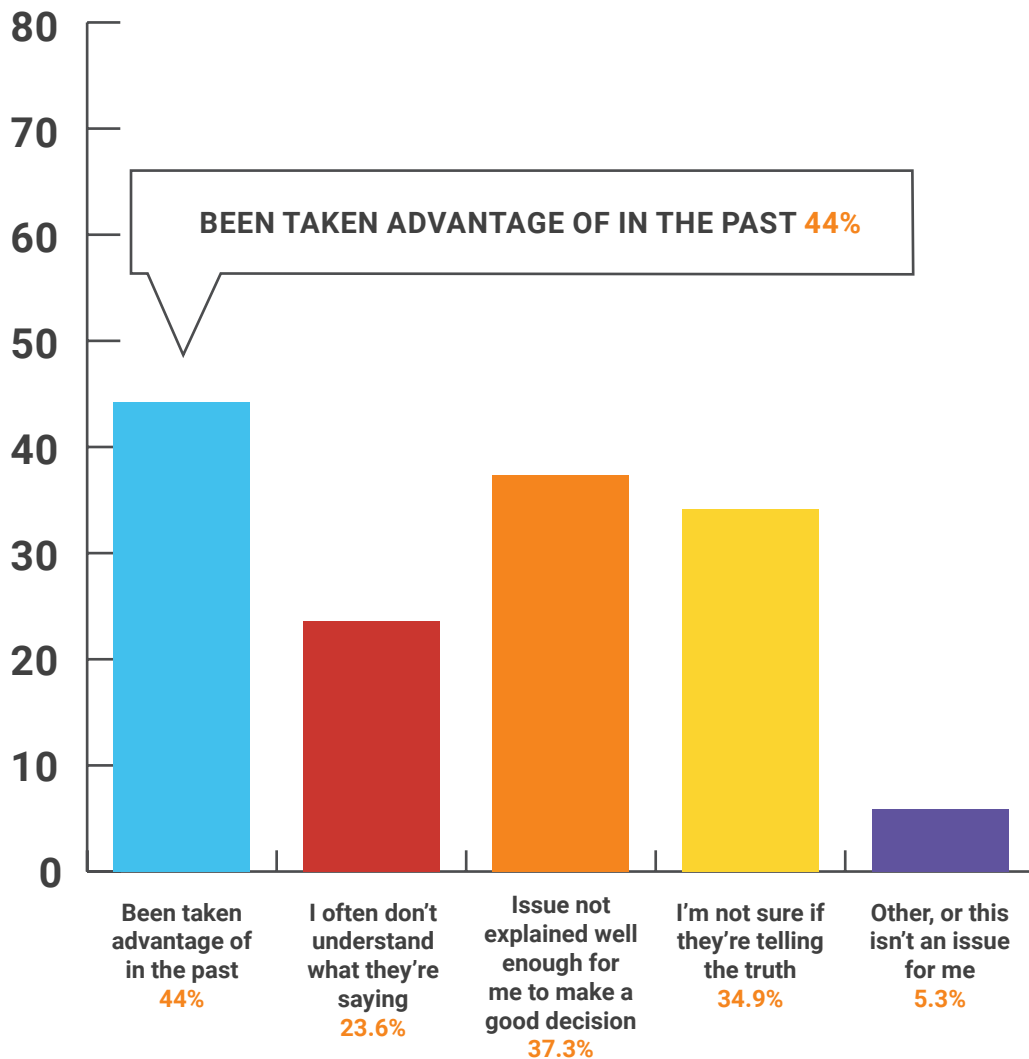
Regardless, 56.1% said they would not obtain the recommended service right away. That is 67.7% of those that trust the recommendations. Still, this should give Service Advisors confidence in their recommendations, even though they might not be accepted that day.

Reasons include budget, scheduling, and wanting to wait until the service becomes urgent. These all provide an opportunity for the Service Advisor to provide additional information to further inform their customer's decision. Depending on the service, the Service Advisor can then discuss the financial impact of postponing the recommendation, and/or help schedule an appointment for when funds will be available.



#6: Mistrusting Recommendations

If you don't trust the recommendation from a Mechanic or Service Advisor employee, why not?
Please select all that apply.

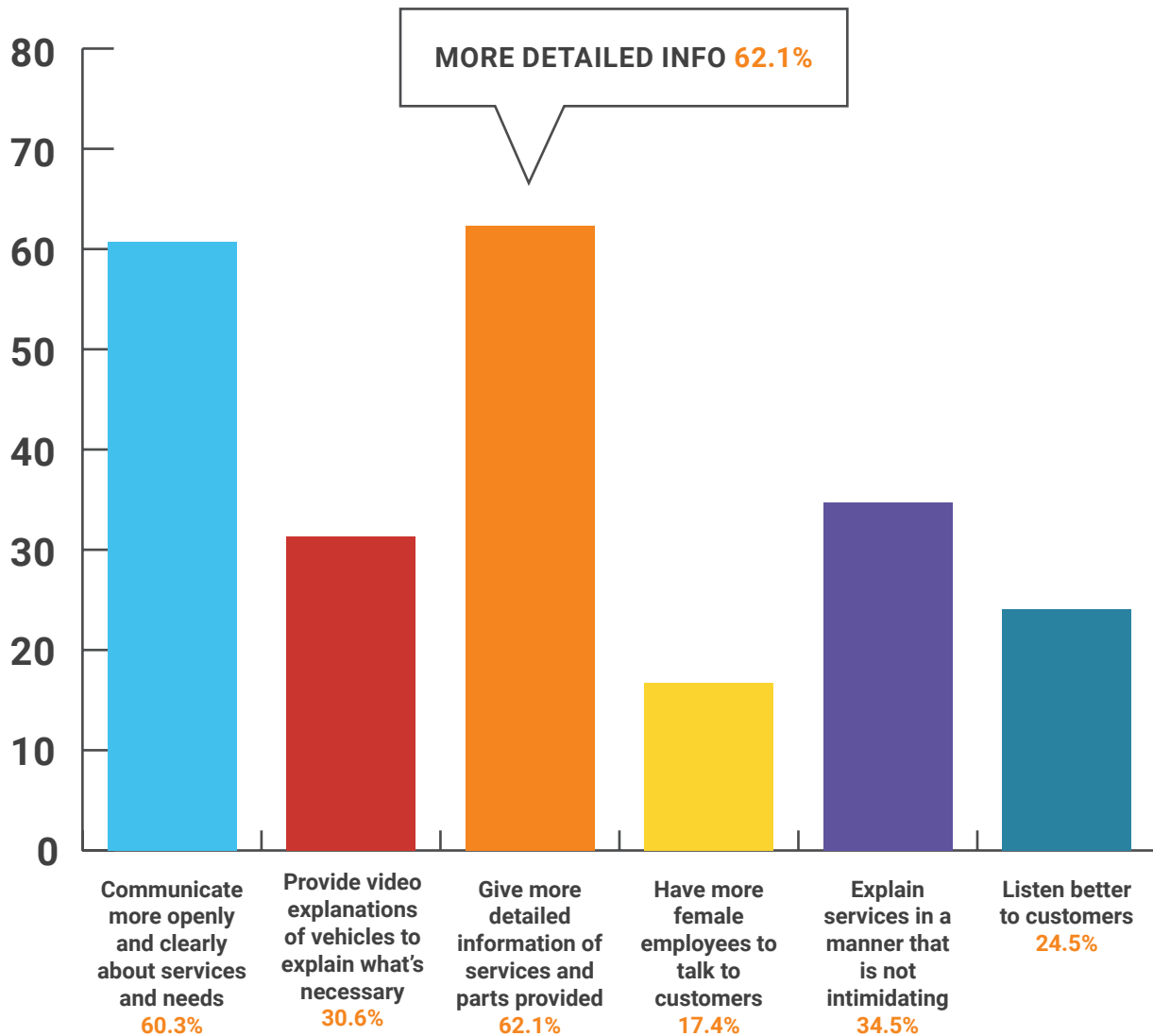


This question asked respondents why they sometimes may not trust a service recommendation and why not. The most frequent response was because they had “been taken advantage of in the past.” This reinforces the power of a previous negative experience. The wise Service Advisor, realizing that this is a common issue, will take action to ensure that each customer interaction is open, transparent, and contains all the information needed for the customer to reach an informed decision.

Options number 2, 3, and 4 all center around customer understanding—one with the respondent taking responsibility for not understanding, another placing responsibility on the Service Advisor, and last questioning the truthfulness of what they were being told. The failure here is in properly conveying enough credible information to instill trust and a high level of confidence. The Service Advisor can help establish their authority by bringing in third party information through various media.

#7: How Advisors Can Improve Trust

What actions can be taken by a Mechanic or Service Advisor employee to improve your trust in their recommendations? Please select all that apply.

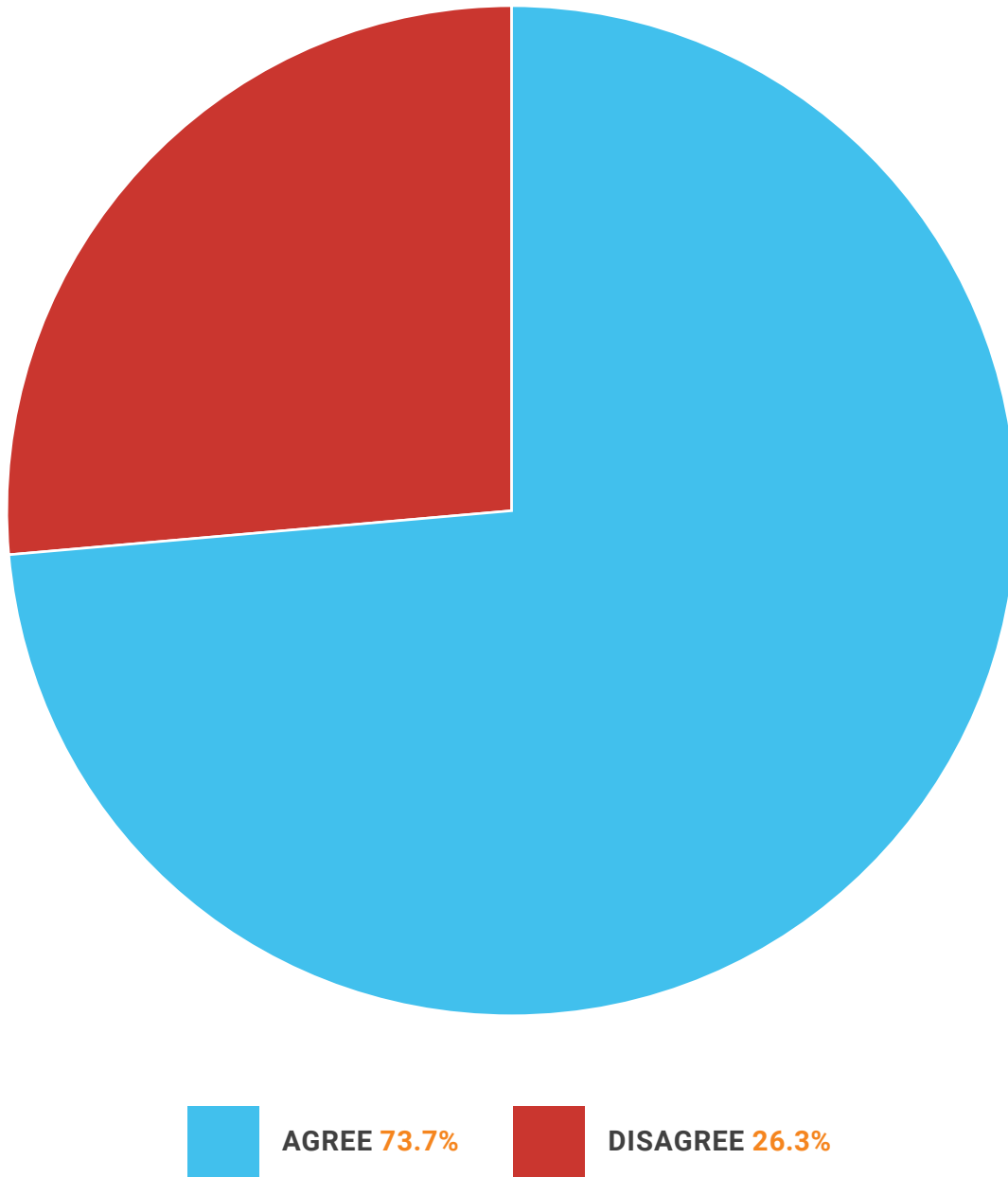


In answer to the question of what service professionals can do to increase trust, “Give more detailed information on service and parts” was the top selection. The second most selected response follows the same theme, “Have more open and clear communication about services and needs.” It appears that vehicle owners’ trust is strengthened with more infor-

mation regarding service recommendations when the information is presented in a way that is relevant, understandable, and clearly communicates the benefits of the recommended services. Better communication can be trained for and consumer education aides are readily available.

#8: How Knowledge Affects Comfort

Do you agree or disagree with the following statement? “My lack of knowledge regarding how vehicles work and the services needed makes me feel more anxious and/or uncomfortable at an automotive service provider.”



This question probes customers’ emotions regarding automotive service. Nearly three quarters (73.7%) of respondents agreed that a lack of knowledge regarding vehicle function makes them feel more anxious and/or uncomfortable at an automotive service provider. Anxiety and discomfort

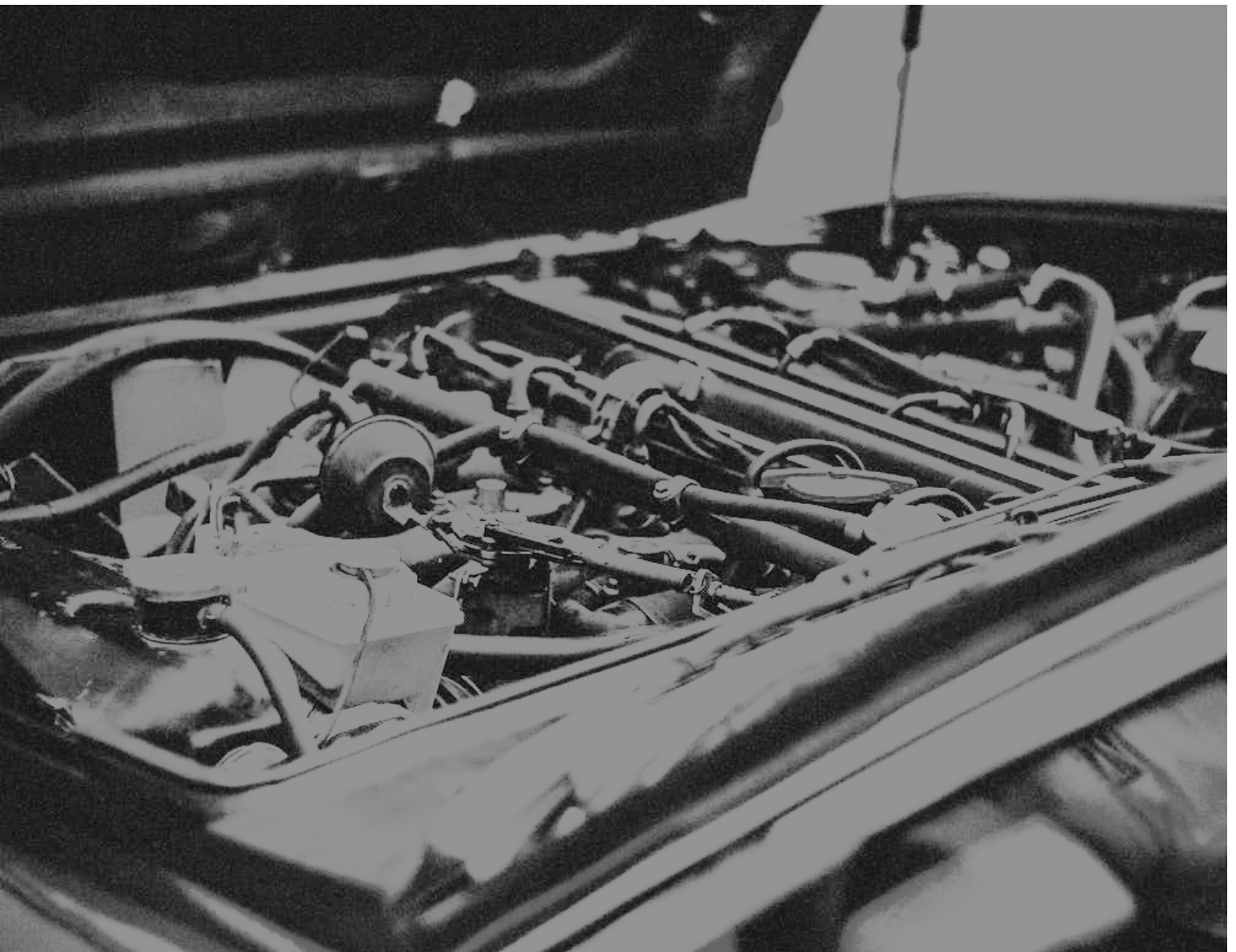
contribute to both hesitation to “say yes” to service recommendations and to a negative customer experience. As customers’ lack of knowledge is addressed with more effective communication, trust will be enhanced and the facility’s Customer Satisfaction Index (CSI) will improve.

“DO YOU AGREE, OR DISAGREE?”

Ninety-four percent of vehicle owners surveyed said "providing better information and explanations of vehicle services is a good thing for automotive service businesses to offer their customers" and 95% said explanations would make them "feel more comfortable at an automotive service provider."

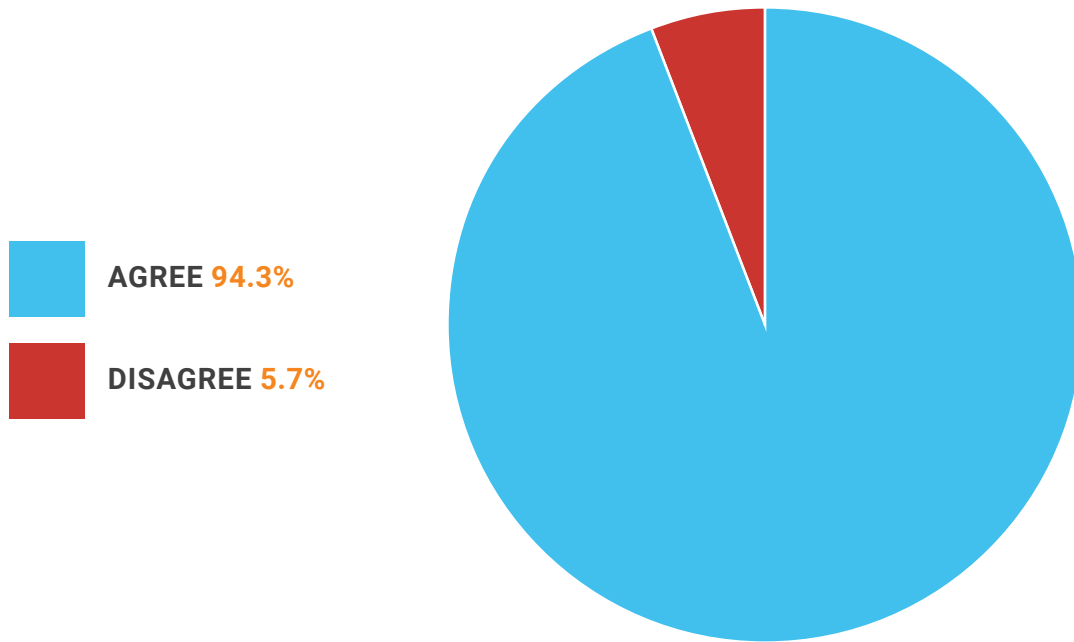
These results are consistent with other respons-

es demonstrating that vehicle owners want to learn more about how their vehicle works, and the various maintenance and repair needs of their vehicle. This presents an opportunity for a service provider to become the customers' primary source of meaningful vehicle service information. The resulting increased levels of trust and comfort should lead to greater repeat business.



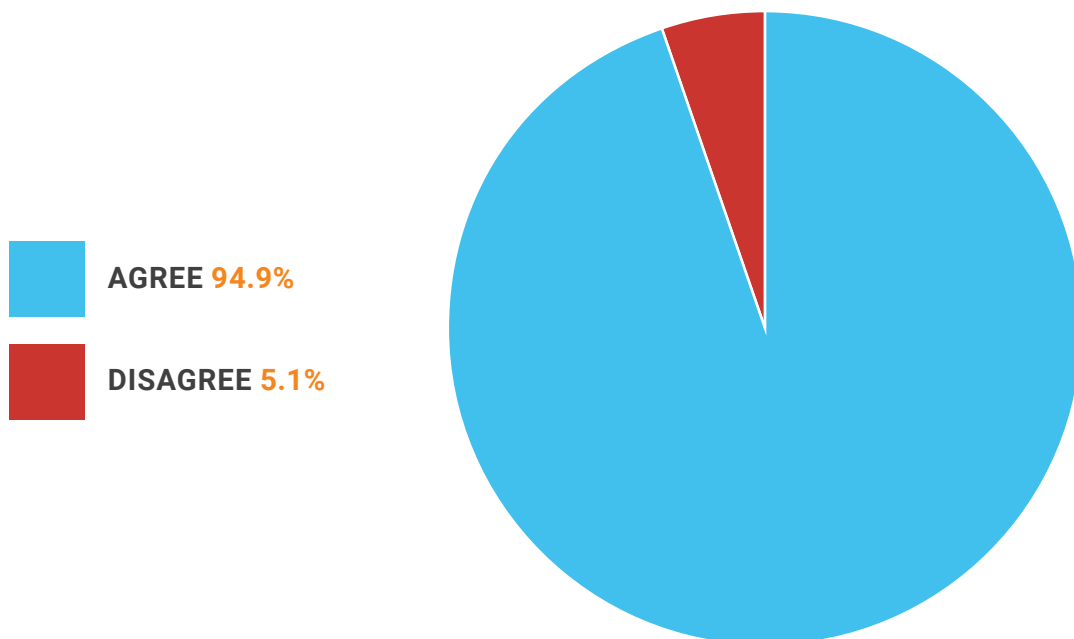
#9: Offer Better Information

Do you agree or disagree with the following statement? "Providing better information and explanations of vehicle services is a good thing for automotive service businesses to offer their customers."



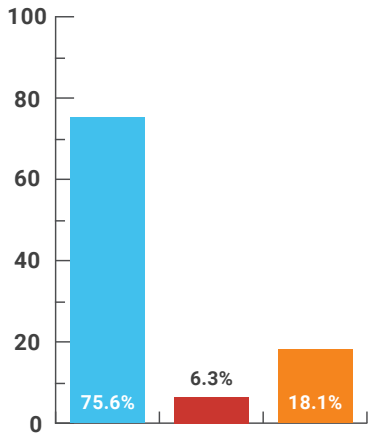
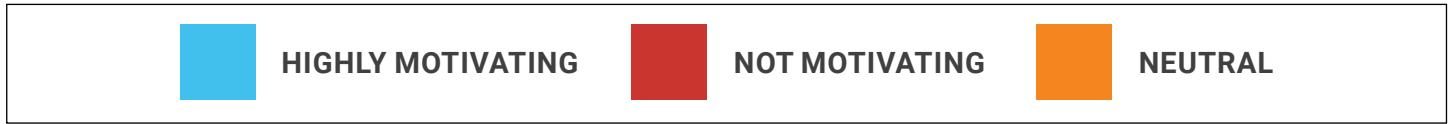
#10: Comfort in Increased Knowledge

Do you agree or disagree with the following statement? "Providing better information and explanations of vehicle services helps me to feel more comfortable at an automotive service provider."

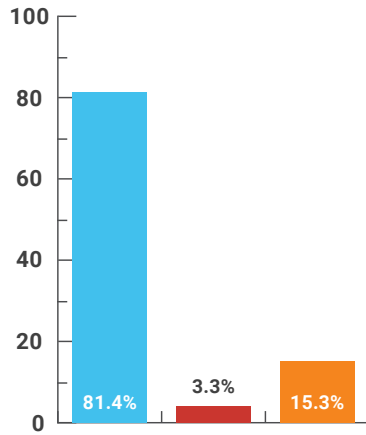


#11: Motivation for Maintenance

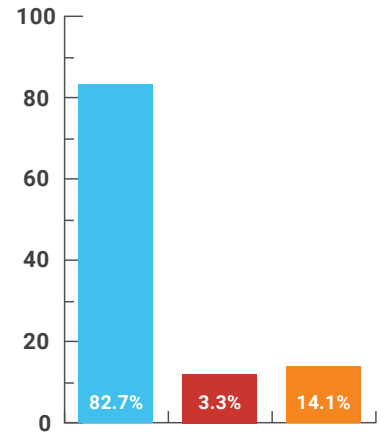
Please rate how the following motivate you to obtain regular maintenance services for your vehicle(s).



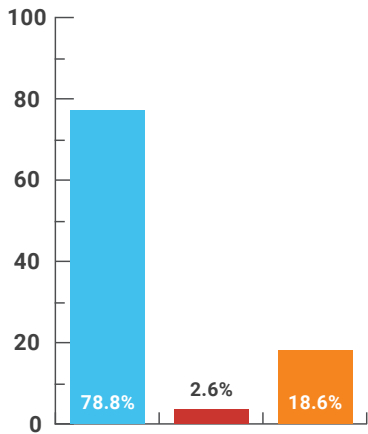
PREVENT EXPENSIVE REPAIRS



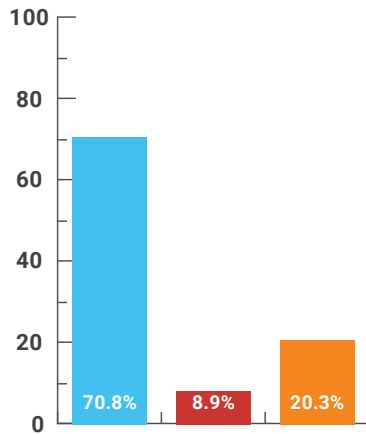
PREVENT FUTURE BREAKDOWN



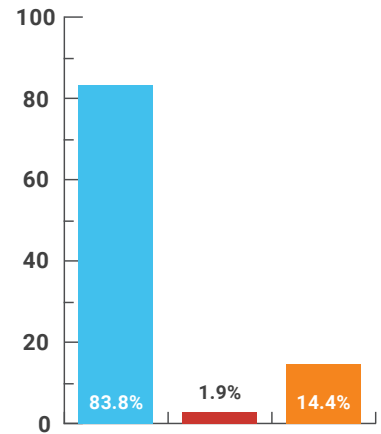
ENSURE RIDER SAFETY



ENSURE VEHICLE PERFORMANCE



PROTECT VEHICLE WARRANTY



MAKE VEHICLE LAST LONGER

This question asked respondents to rate what motivates them to obtain regular maintenance services. When combining the categories “Motivating” and “Highly Motivating,” we find “Ensuring that my car will last longer” coming in first (83.8%), “Ensuring Safety” next (82.7%), and “Preventing future care failure/break-

down” in third place (81.4%).

The top concerns may correlate with the increasing average vehicle age. Keeping these vehicles running well, safely, and failure free is highly motivating. Educational communications framed in these terms should be very motivating for customers.

EFFECTIVENESS OF PRESENTATION METHODS

The survey presented vehicle owners with information regarding Differential Service. Information was presented in three formats: text taken from a nationally recognized automotive service website (shown below), an image with pictures and text (shown on page 16), and a video (shown on page 16, [click to view](#)). The video was a consumer education video created by AutoNetTV for use by service facilities.

The survey respondent was asked to look at each and select which method “helped you understand the

topic best.” Video was the #1 response (69.1%), followed by the paragraphs of text (17.5%), and the image coming in at 13.5%. This is consistent with other research on the power of video versus other media. Video usage on a website increases time spent on the site by 88% (Mist Media). Also, prospects who view videos of a product are 85% more likely to buy (Internet Retailer).

Overall, in order to achieve effective and memorable communication, video is by far the most effective medium.

TEXT PROVIDED TO SURVEY PARTICIPANTS

When a car makes a left turn, the interior-facing wheels (on the left side) naturally turn slower than the exterior-facing wheels (on the right side) because the exterior-facing wheels have to travel farther to get the car around the corner. For this reason, the wheels of a car need to be able to revolve independently and at varying speeds to prevent slipping, and to keep the car moving with power around corners.

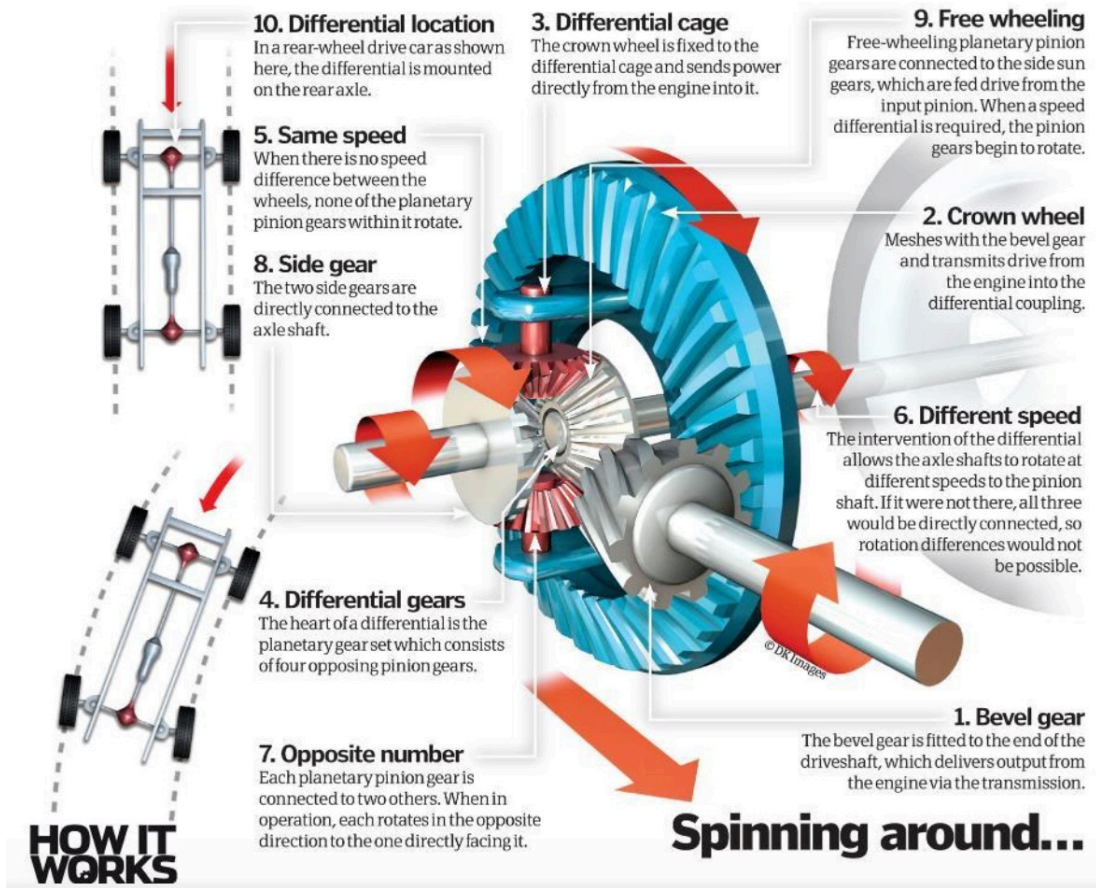
A car’s differential is a mechanical set of simple planetary gears that allows wheels to spin at independent speeds, and to be independently powered by the engine through the car’s drivetrain.

Whether or not your car has one or two differentials depends on how the wheels of your vehicle are powered. If you have a rear-wheel drive vehicle your car uses engine power to move only the rear wheels, so you will only have one differential mounted on the rear axle. If you have an all-wheel or four-wheel drive vehicle your car is built in a way that allows the engine to send power to all four wheels, so you will have both a front differential and rear differential. If you have a front-wheel drive vehicle, instead of a differential you will likely have a transaxle that functions as both the transmission and the differential. Rear wheel drive vehicles will have a differential in the rear end of the car.

Inside your differential you’ll find lots of interlacing gears and bearings. These gears all rely on each other and a lubricant called differential fluid to keep the differential transferring power smoothly and seamlessly. Front differential, rear differential and limited slip differential (LSD) all require gear oil to lubricate and keep the differential drive components cool.

Since your vehicle cannot function without a differential, it’s highly recommend getting your differential inspected, and the differential fluid changed, as a part of your regular vehicle maintenance routine. How often differential service is required will vary from car to car based on vehicle make, model and mileage.

IMAGE PROVIDED TO SURVEY PARTICIPANTS

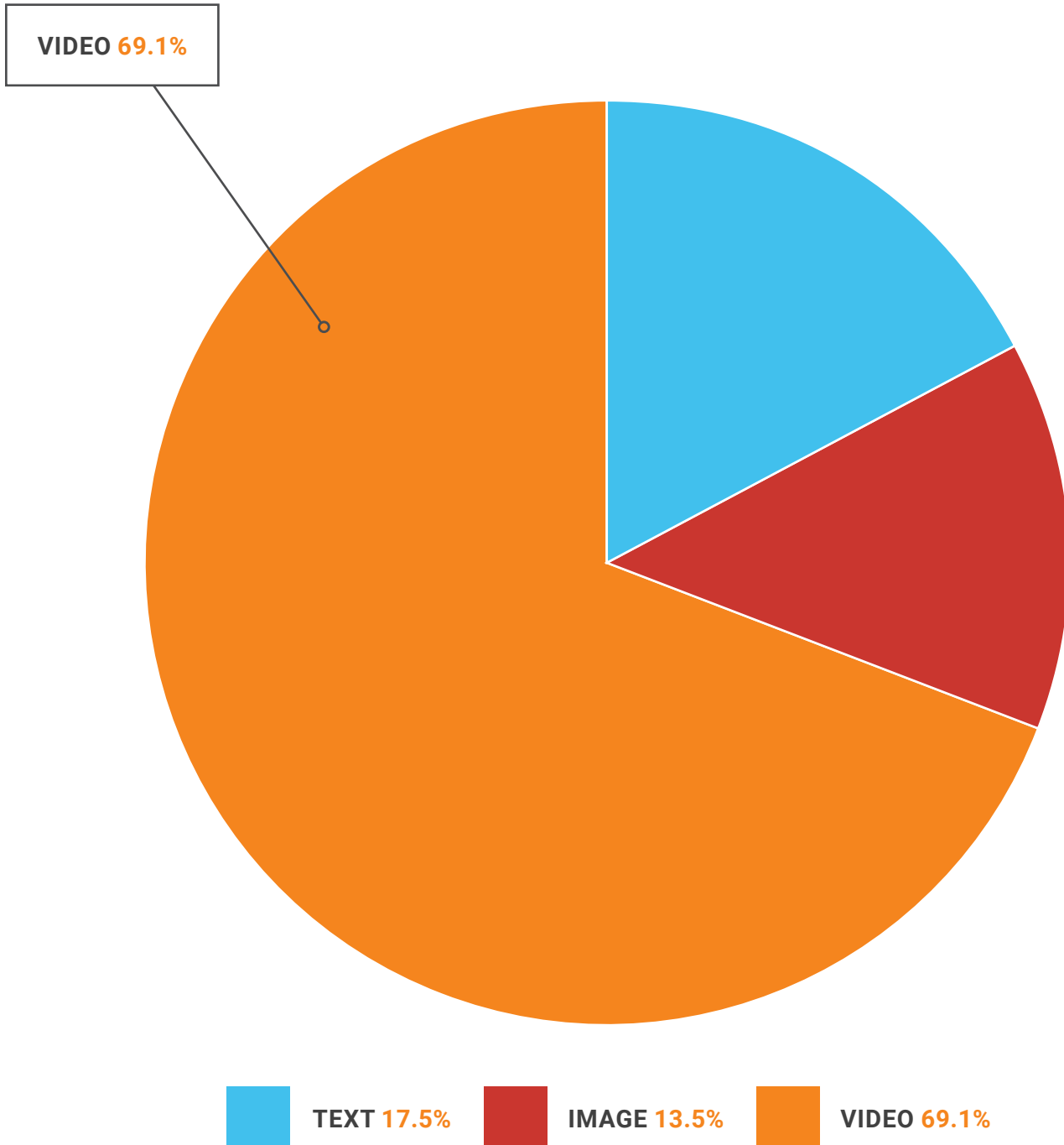


VIDEO PROVIDED TO SURVEY PARTICIPANTS: [CLICK HERE](#) OR BELOW TO WATCH



#12: Presentation Effect on Clarity

Which of the presentation methods helped you understand the topic best?



EFFECTIVENESS OF AUTONETTV VIDEO

Survey participants were shown another AutoNetTV video and asked several questions about their attitudes and responses to the video. We wanted to learn their opinion on the impact of videos like the AutoNetTV video. Specifically:

- **Increases Interest in Obtaining the Service (92%)**
- **Increases their Desire to Ask if their Vehicle Needs that Service (91.9%)**
- **Increase their Comfort with Accepting Service Recommendations (95.8%)**
- **Minimizes their Stress Regarding Vehicle Services (92.2%)**
- **Increases their Trust in the Employees at a Business that Showed Those Videos (94.7%)**
- **Increases their Receptivity to Vehicle Service Recommendations (94.9%)**
- **Increases Feelings of Credibility Towards a Service Provider that Showed Those Videos (95.4%)**
- **Increases their Desire to Return to a Service Provider that Showed Those Videos (95.9%)**

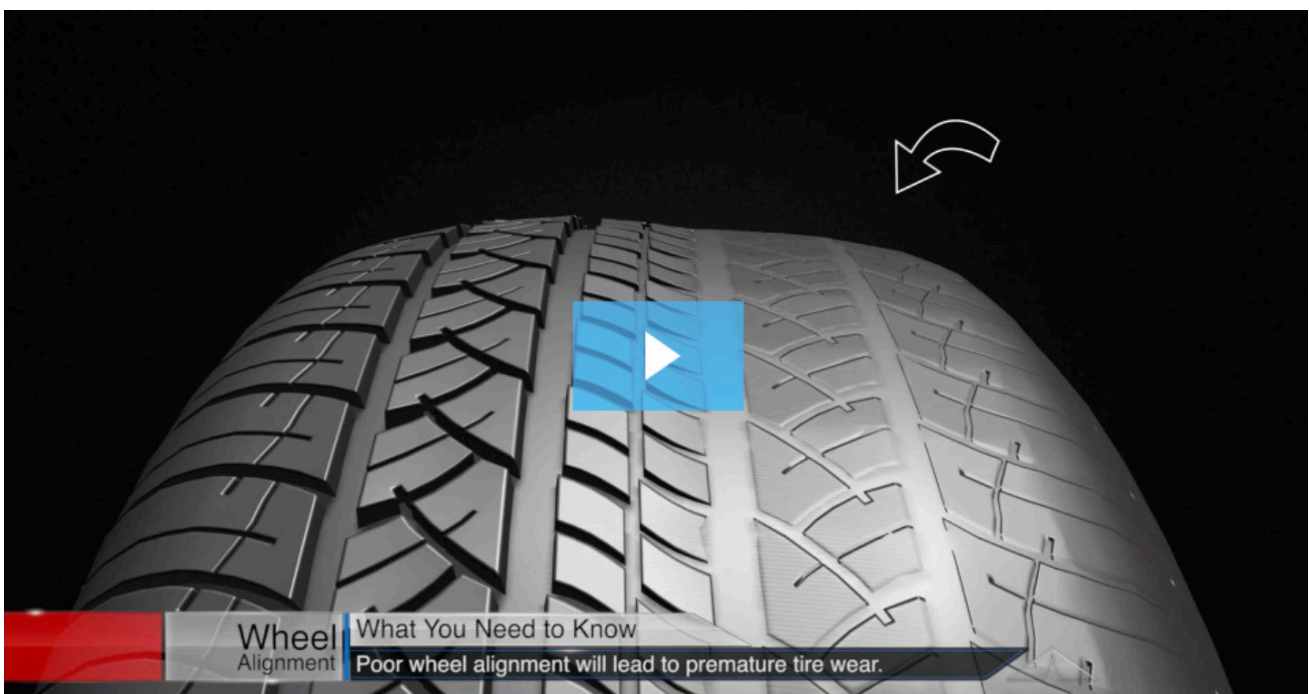
For every one of these attitudes/opinions, the vehicle owner responses said showing AutoNetTV Video positively increased those feelings “A Little or A Lot” for at least 91% of the participants.

Finally, respondents were asked, Do you agree or disagree with the following statement? “I would find it helpful if a Service Advisor or Mechanic showed me a brief video to help explain what’s wrong with my car and/or the type of service she/he is recommending.”

The results: **94.5% agreed with the statement.**

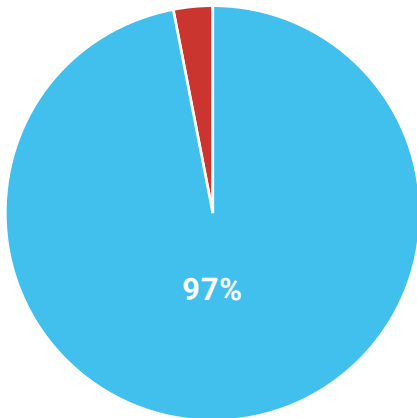
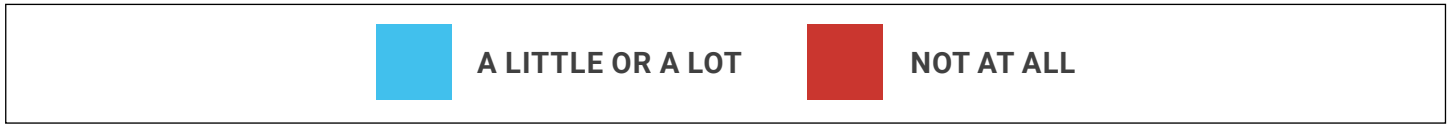
The answers to these questions seem to indicate that additional information about how their vehicle works, why services are recommended, the benefits of performing recommended services, and the potential negative ramifications of neglecting timely service are very important to vehicle owners. They agree that video is the most effective tool a service provider can use to convey that information powerfully and effectively.

[Click Here](#) or [Below](#) to Watch the **Second Video Shown to Participants**

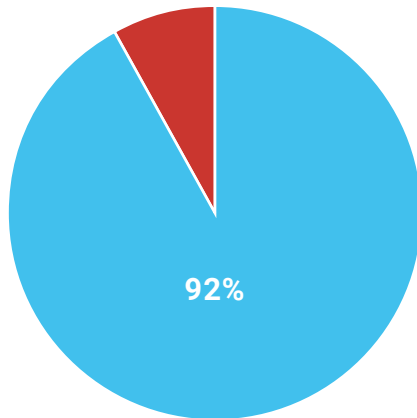


#13: Effect of AutoNetTV Video

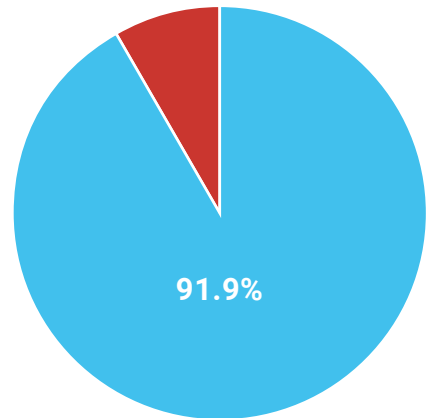
How much did that video that you just watched ...



INCREASE YOUR UNDERSTANDING OF THE SERVICE?



INCREASE YOUR INTEREST IN OBTAINING THE SERVICE?

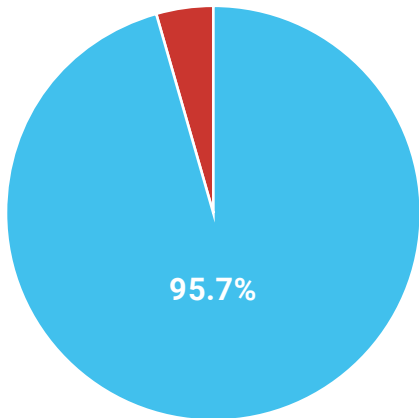
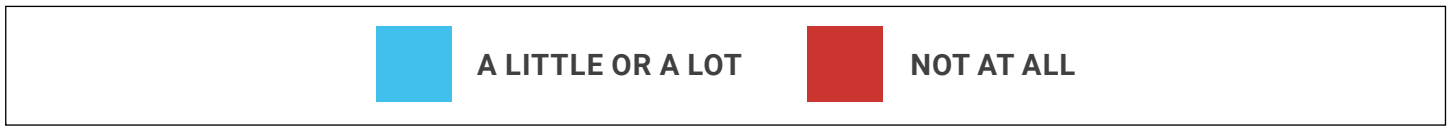


INCREASE YOUR DESIRE TO ASK IF YOUR VEHICLE NEEDS SERVICE?

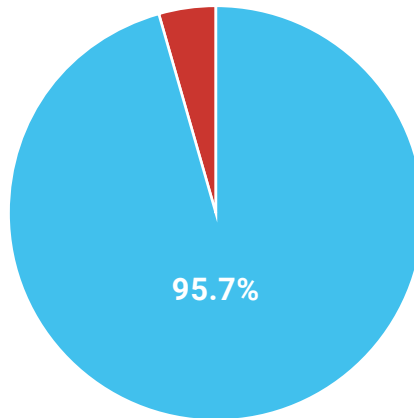


#14: Effect of AutoNetTV Videos

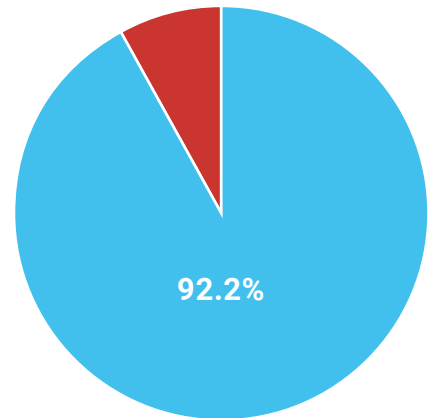
How much would videos like the one that you just watched ...



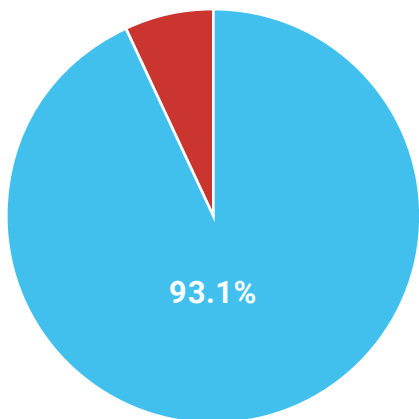
INCREASE YOUR COMFORT WITH ACCEPTING AUTOMOTIVE SERVICE RECOMMENDATIONS?



INCREASE YOUR CONFIDENCE IN MAKING AUTOMOTIVE SERVICE DECISIONS?



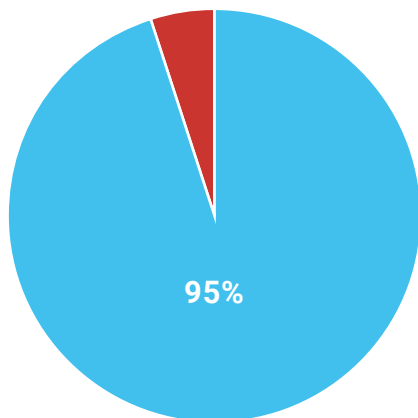
MINIMIZE YOUR STRESS REGARDING VEHICLE SERVICES?



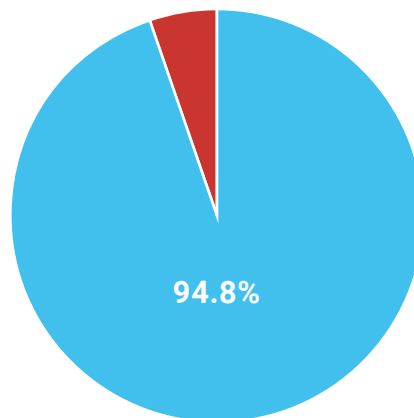
INCREASE TRUST IN RECOMMENDATIONS MADE BY EMPLOYEES AT AN AUTOMOTIVE SERVICE BUSINESS?

#15: Impact of AutoNetTV Videos

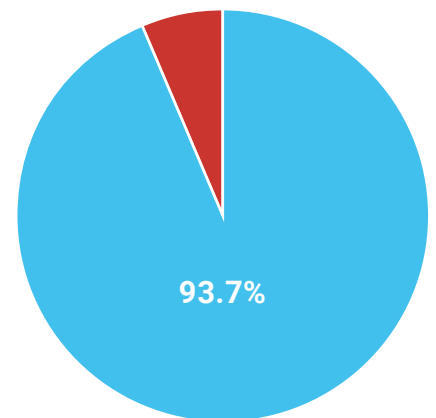
If automotive service providers displayed videos like the one that you just watched for their customers, how would it impact ...



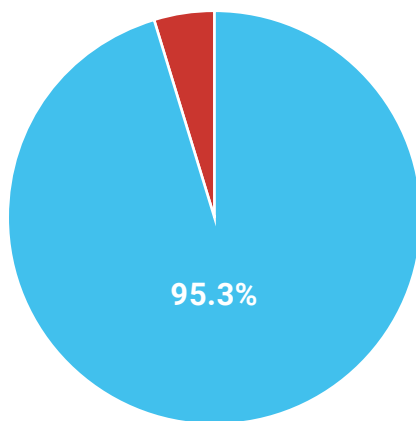
YOUR RECEPTIVITY TO VEHICLE SERVICE RECOMMENDATIONS?



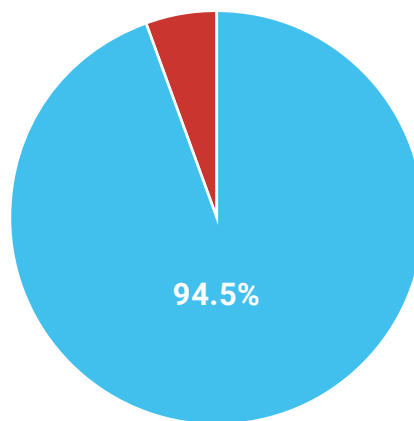
YOUR TRUST IN THE EMPLOYEES AT THE PROVIDER?



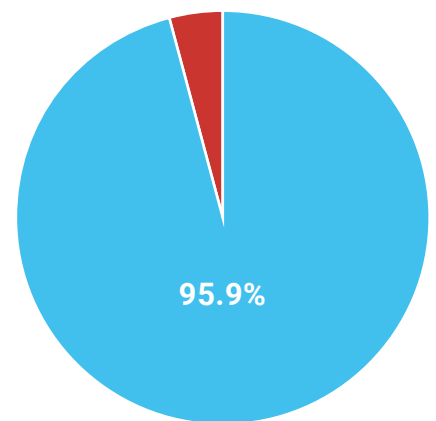
YOUR WILLINGNESS TO OBTAIN ADDITIONAL SERVICES DISCUSSED?



YOUR OVERALL FEELINGS OF CREDIBILITY TOWARDS THAT SERVICE PROVIDER?



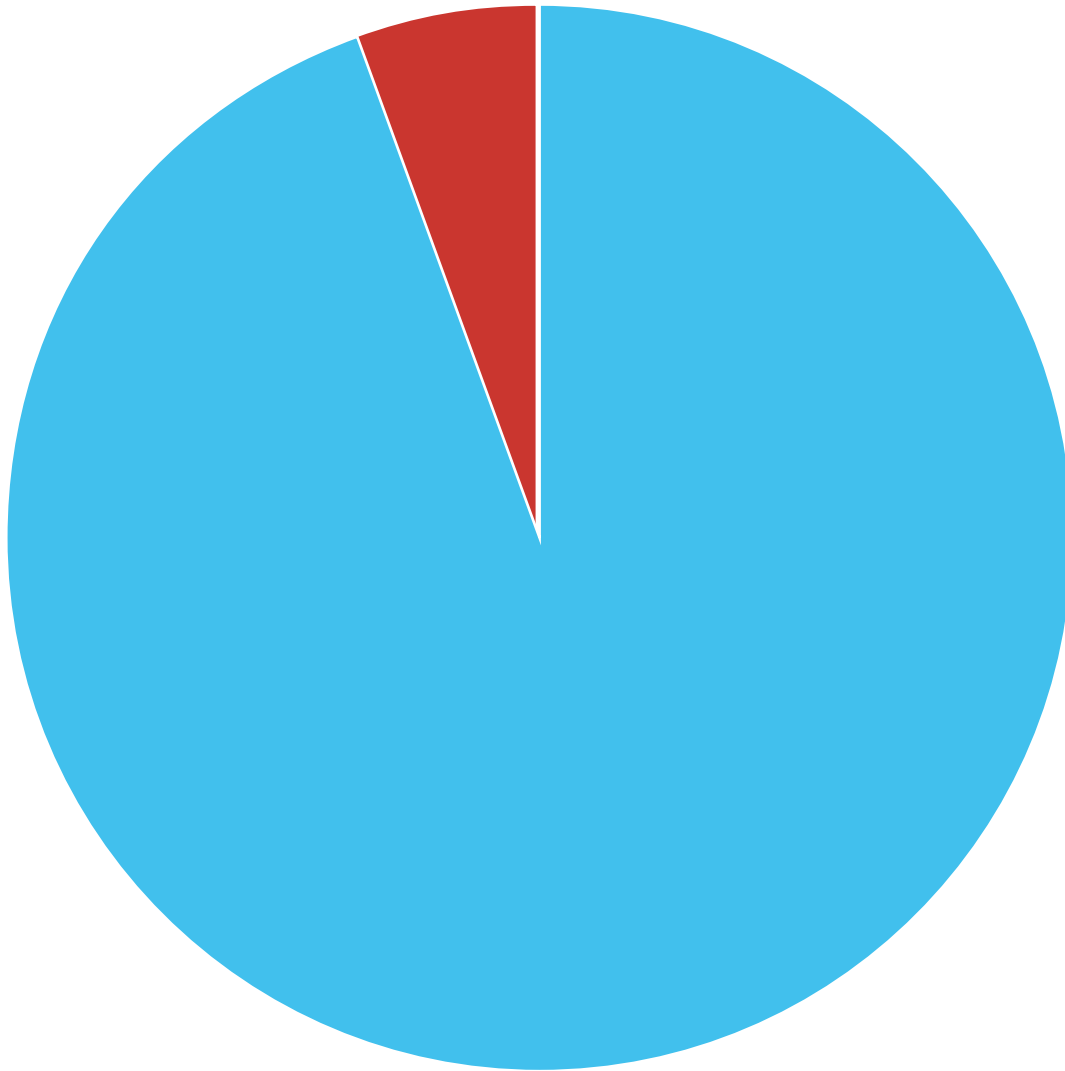
YOUR COMFORT IN DISCUSSING VEHICLE SERVICES WITH THE EMPLOYEES AT THE PROVIDER?



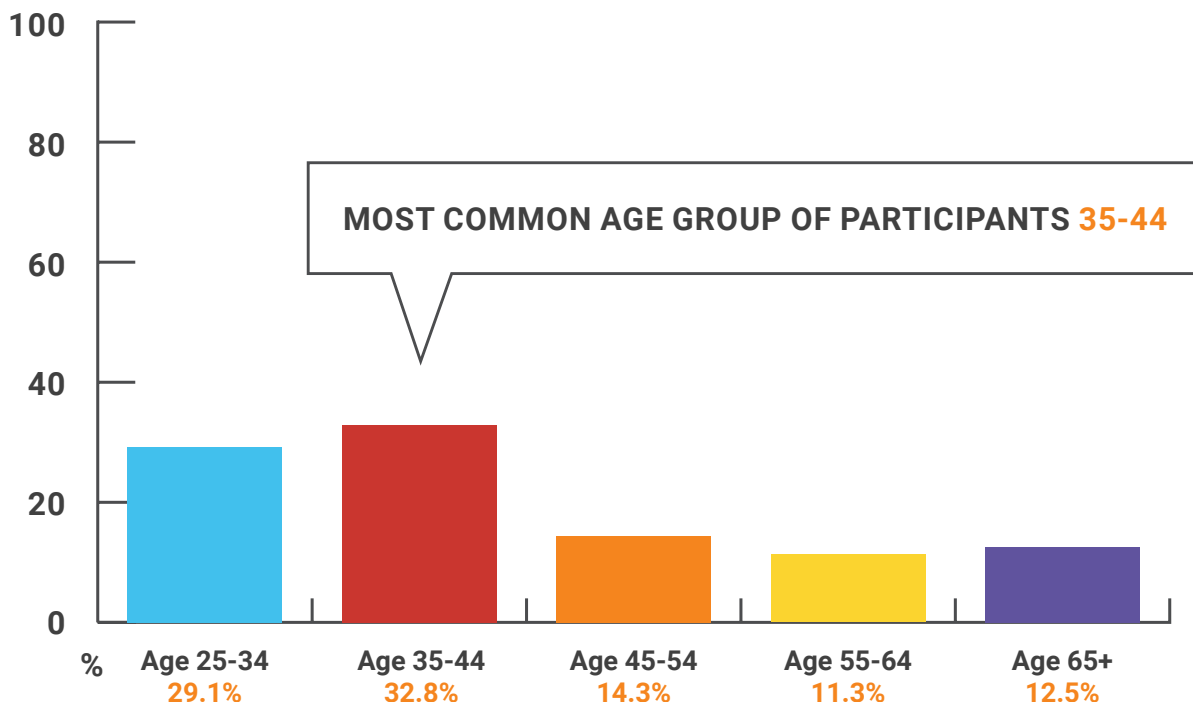
YOUR DESIRE TO RETURN TO THAT SERVICE PROVIDER IN THE FUTURE?

#16: Helpfulness of Video Aids

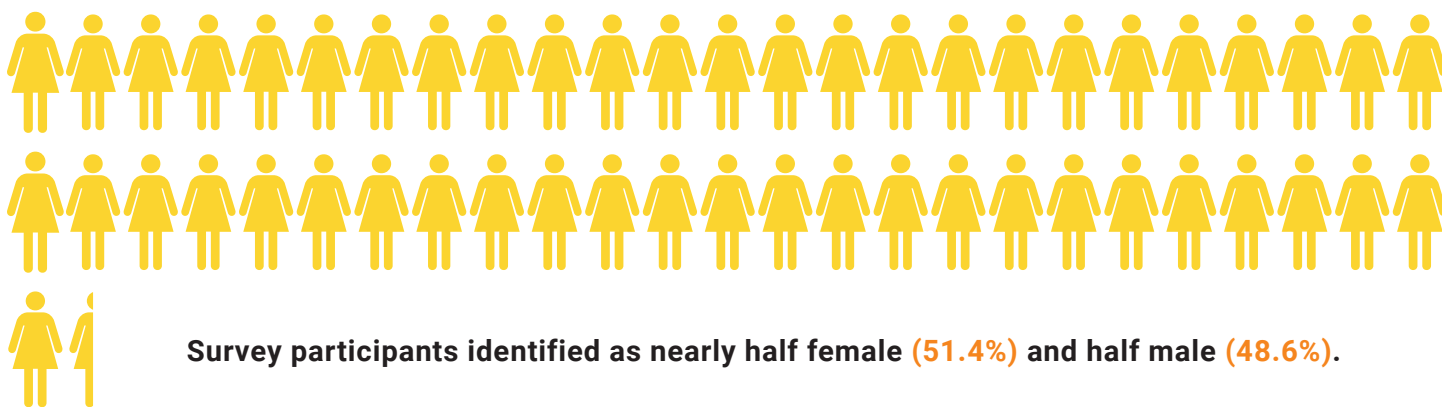
Do you agree or disagree with the following statement? "I would find it helpful if a Service Advisor or Mechanic showed me a brief video to help explain what's wrong with my car and/or the type of service she/he is recommending."



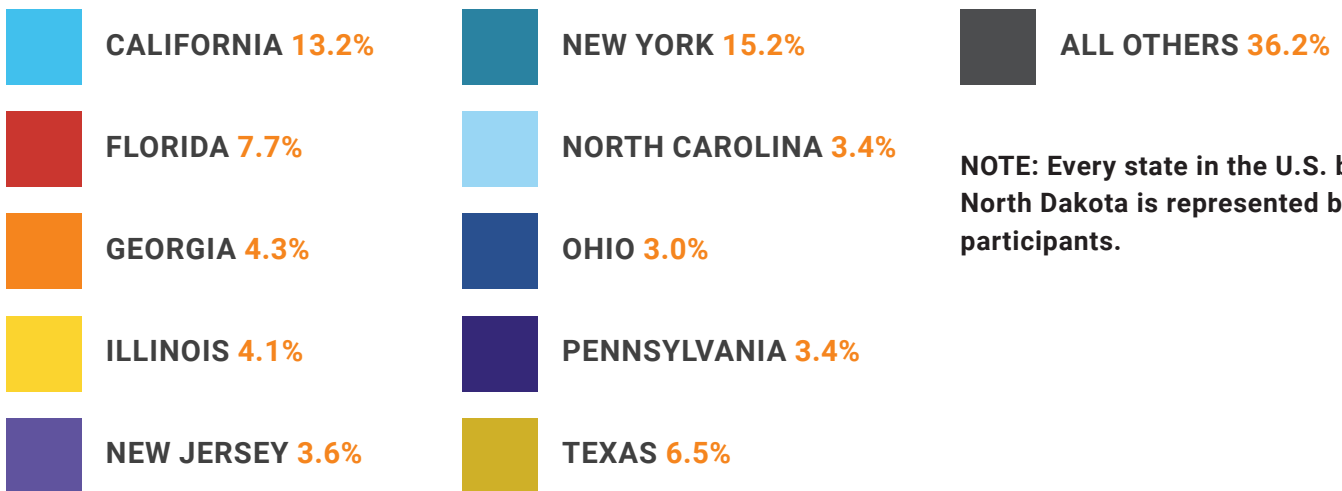
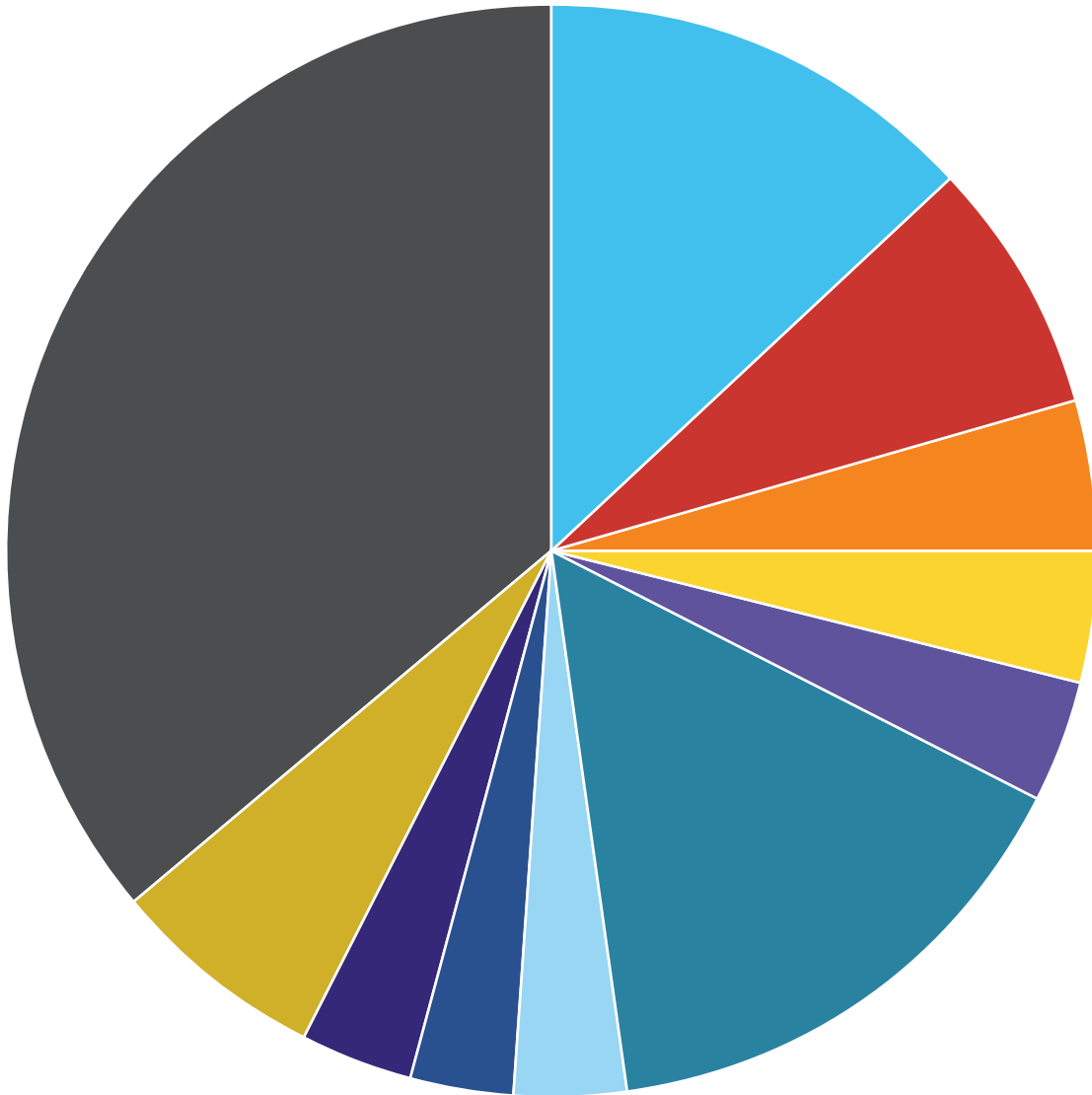
What is Your Age Range?



With Which Gender Do You Identify?



In Which State Do You Live?



Automotive Service Report

2020-2021 nationwide survey of vehicle owners within the United States, part two of two.

