



Automotive  
Industry

GLOBAL

# CUSTOMER SATISFACTION PULSE STUDY

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# Study Objective & Methodology

**A Mystery Visit Study was conducted within the Automotive Industry to gain insights from an every day customer's point of view.**

This customer perspective brings out strengths, weaknesses and insights for this industry that might be **helpful for Automotive Brands to improve areas such as:**

- **Operations**
- **Employee Commitment**
- **Customer Experience**

## **Project Scope**

- **Brands evaluated: Ford, Jeep and Toyota**
- **Fieldwork Period: September 2015**
- **Global Locations across 10 countries**

Brazil (BR)	Germany (DE)	United Kingdom (UK)
Chile (CL)	India (IN)	United States (US)
China (CN)	Mexico (MX)	
France (FR)	Singapore (SG)	

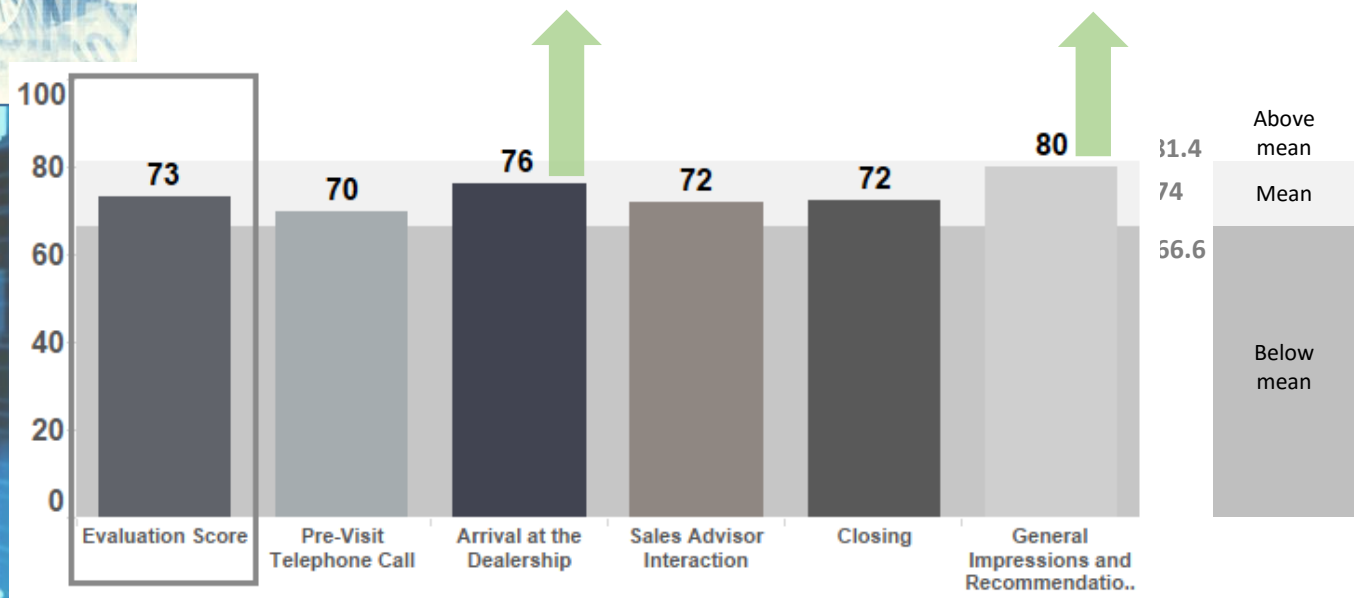
**Investigated 5 relevant touch-points of the customer journey:**

- **Pre-Visit Telephone Call**
- **Arrival at the Dealership**
- **Sales Advisor Interaction**
- **Sales Closing**
- **General Impressions and Recommendations**



# Overall Results

Arrival at the Dealership and General Impressions show their correlation to the Overall Evaluation Score with highest results.



\*All means above are based on scores (overall and by section)

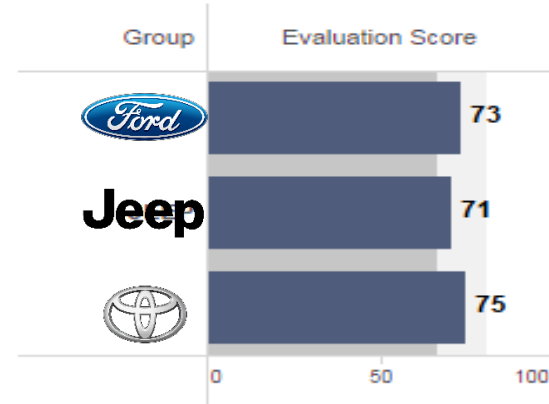


Pre-Visit Telephone Call shows the lowest score among the main sessions: the index of (70) is according to the mean, followed by Sales Advisor (72), and Closing (72) respectively.



# Overall Results by Brand

When considering an overall evaluation score, Toyota dealer results tended to be higher overall, followed by Ford and Jeep; although all brands rank relatively close to one another.



In global results, all brands present a good Overall Evaluation Score in Brazil and Singapore. However, in the other countries, there are more significant differences in results between brands measured.

Location Country	Ford	Jeep	Toyota	Grand Total
BR	86	84	88	86
CL	48	79	64	64
CN	78	72	79	76
DE	75	28	62	55
FR	48	75	78	67
IN	80		85	82
MX	70	67	60	66
SG	88	82	82	83
UK	92	21	54	56
US	72	73	77	74
<b>Grand Total</b>	<b>73</b>	<b>71</b>	<b>75</b>	<b>73</b>

Avg. Evaluation Score 50 100



# Overall Results by Touch Point

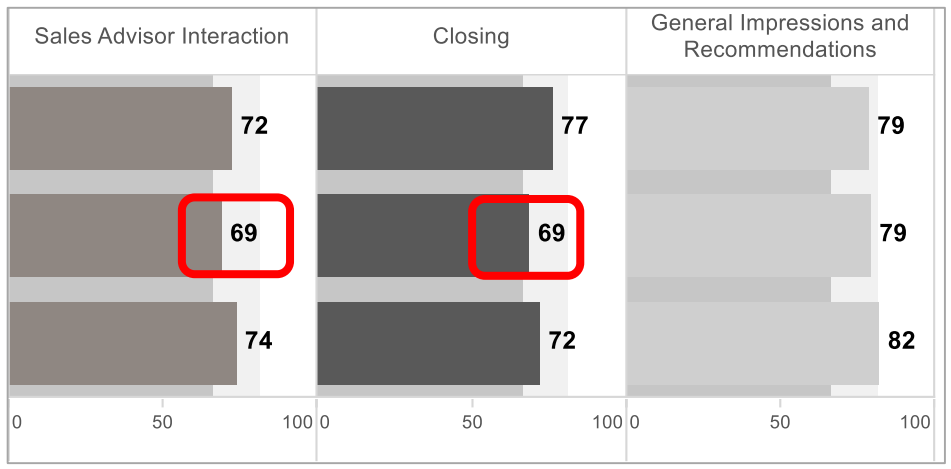
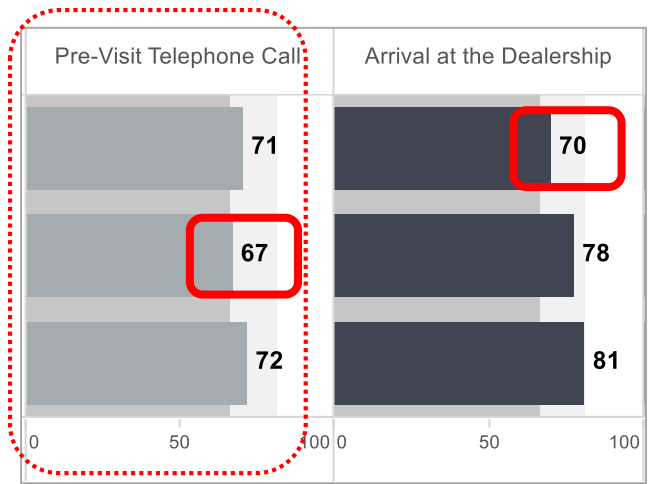
Although all Brands present a similar and positive Overall Evaluation Score, there are opportunities for improvement in all touch points, most prominently in Pre-Visit Telephone Calls, Sales Advisor Interaction, and Closing areas.

## Brand Opportunities:

**Ford** → the lowest score is *Arrival at the Dealership* which should be improved in order to compete with other brands.

**Jeep** → take actions to improve all touch points, mainly *Pre-Visit Telephone Call*, *Sales Advisor Interaction* and *Sales Closing*.

**Toyota** → maintain practices regarding *General Impressions and Arrival at the Dealership*. Use them as unique opportunities, work on improving interactions at other touch points.



# RESULTS BY KEY VARIABLES

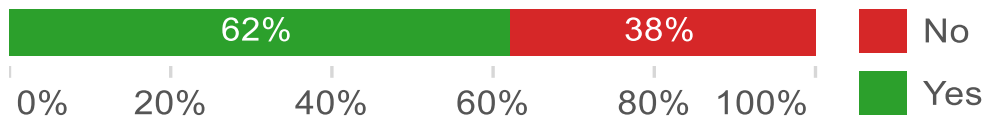
Variable selection based on negative impact on Overall Evaluation Score of each brand.



**KEY IMPACT:**

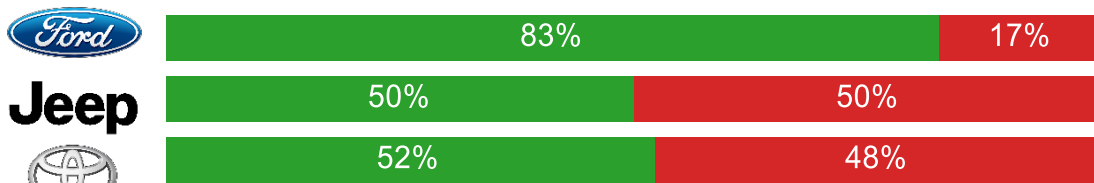
Almost 4 out of 10 calls completed to the dealerships were not answered as expected.

Was the phone answered within 2 rings by an associate and not an automated system?



Overall Results

Was the phone answered within 2 rings by an associate and not an automated system?



Question by Brand

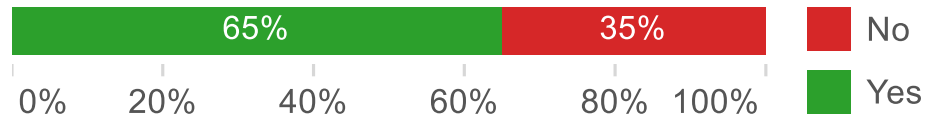
The low scores in this question were calls made to the Jeep and Toyota dealerships.

Ford dealers did a good job handling in-coming calls quickly and with a live person.

**KEY IMPACT:**

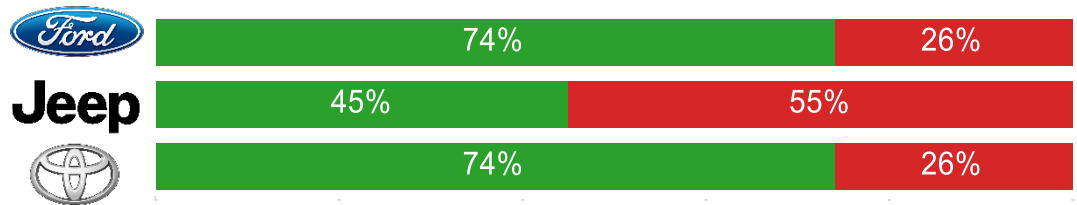
Overall, all 3 brands need to work on asking questions to determine potential buyer needs and preferences

Did the associate ask questions to better understand your needs/what you would like?



Overall Results

Did the associate ask questions to better understand your needs/what you would like?



Question by Brand

When filtered by brand, Ford and Toyota scored the same here, but have room for improvement.

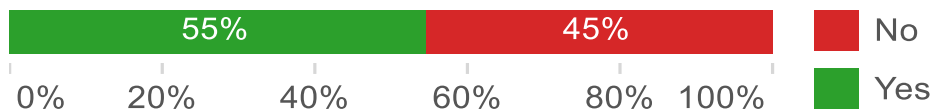
Jeep has more than a 50% opportunity to learn more about their perspective buyers.



**KEY IMPACT:**

Contact information of potential buyers was collected only 55% of the time.

Did the associate collect your contact information before closing the conversation?



Overall Results

Did the associate collect your contact information before closing the conversation?



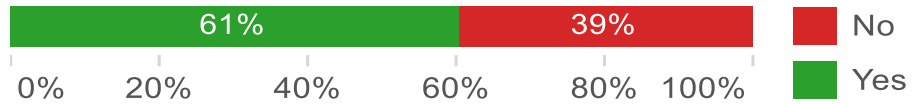
Question by Brand

All 3 brands are missing a key driver of future sales by not obtaining potential customer contact information. In this case, Jeep beat the competition 7% overall, but was still only 50/50.

**KEY IMPACT:**

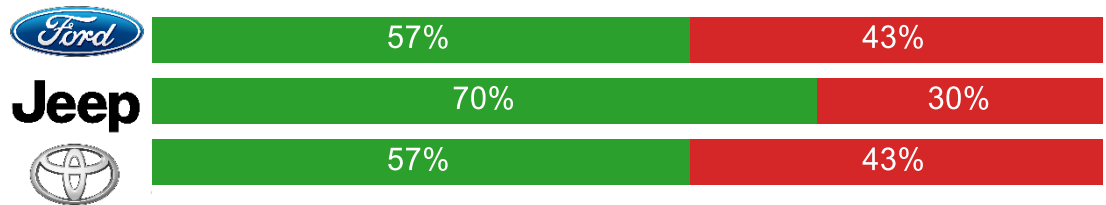
No welcome appears in almost 40% of dealer locations.

Did the reception area have a “Welcome” sign (such as sign display or TV)?



Overall Results

Did the reception area have a “Welcome” sign (such as sign display or TV)?



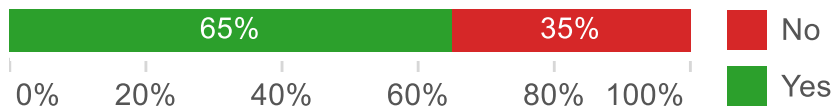
Question by Brand

Ford and Toyota results suggest that a strategically placed welcome could improve the customer arrival. In this case, Jeep beat the competition 13% overall again here, but could still improve considerably.

**KEY IMPACT:**

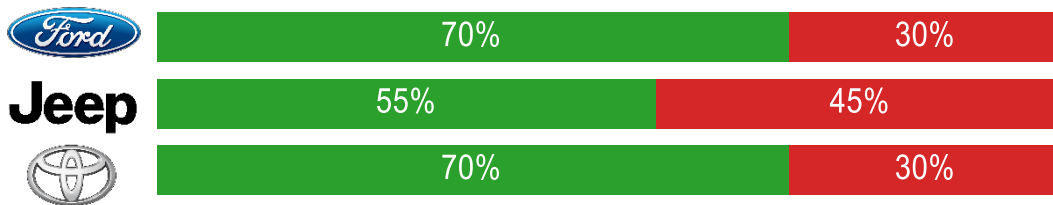
Knowing more about the current vehicle and usage is important to understanding customer needs.

Did the Sales Advisor ask questions about your current vehicle/mode of transportation?



Overall Results

Did the Sales Advisor ask questions about your current vehicle/mode of transportation?



Question by Brand

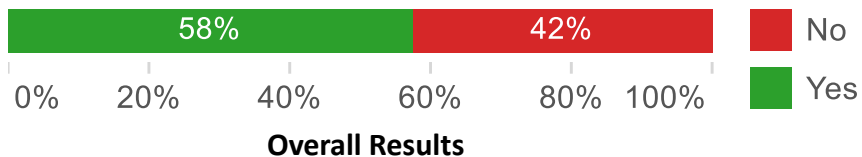
Jeep sales advisors could do a better job understanding the customer's current situation.

Ford and Toyota advisors ask more often, but still have room for improvement.

**KEY IMPACT:**

Knowing more about the customer's planned usage is very important to matching vehicle to buyer needs.

Did the Sales Advisor ask you about the purpose of use (city, countryside, highway, motorway) for vehicle of interest?



Question by Brand

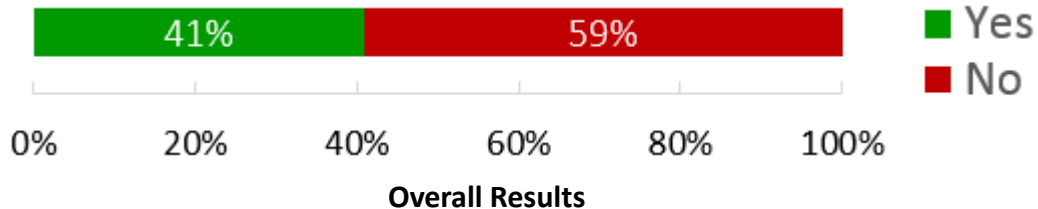
When asking about vehicle use, Jeep sales advisors reversed the tables by 18%. Clearly, Jeep brand culture plays a part.

Ford and Toyota advisors are not asking about use almost 50% of the time.

**KEY IMPACT:**

Lack of competitor knowledge leaves opportunity on the table.

Did the Sales Advisor compare the vehicle to its competitors?



Did the Sales Advisor compare the vehicle to its competitors?



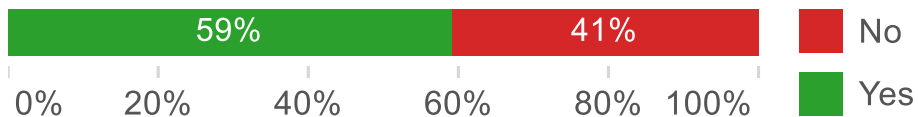
Ford nor Toyota sales advisors provided information comparing their vehicles to competitors less often than Jeep, but not by much.

Jeep advisors did slightly better, but still missed this opportunity to sell the positive brand strengths.

**KEY IMPACT:**

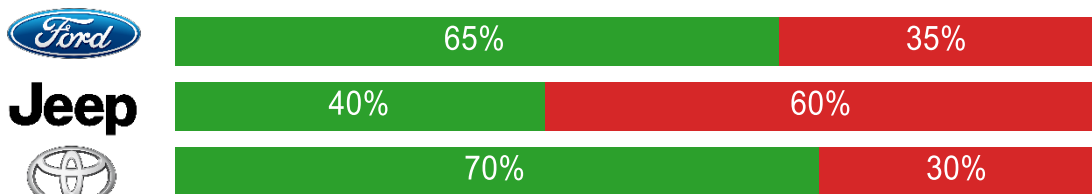
Understanding price tolerance is key to base sales and to upselling.

Did the Sales Advisor ask your price range?



Overall Results

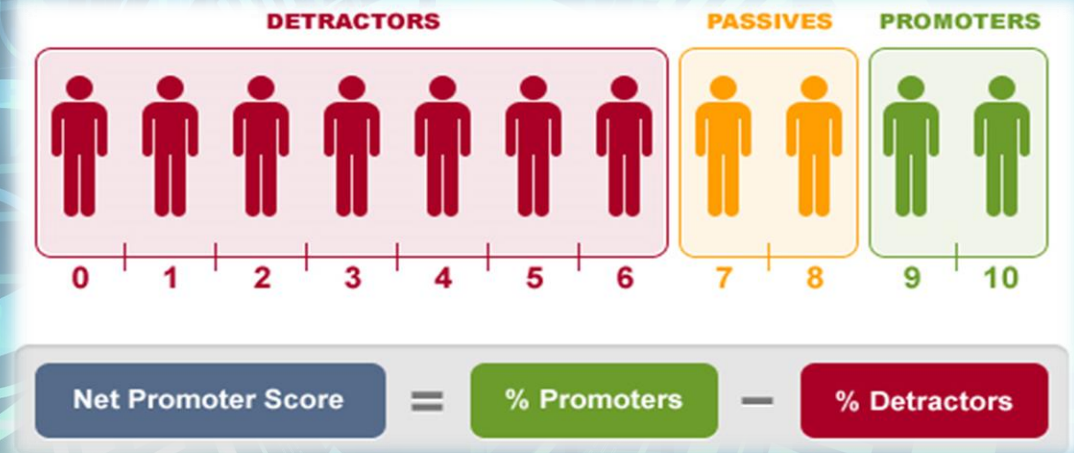
Did the Sales Advisor ask your price range?



Question by Brand

Each of the 3 brands studied have opportunities for improvement on this front. Jeep missed this advantage by 25% and greater compared to Ford and Toyota.

NPS is an absolute number, which is equal to the difference between percentage of Promoters and Detractors



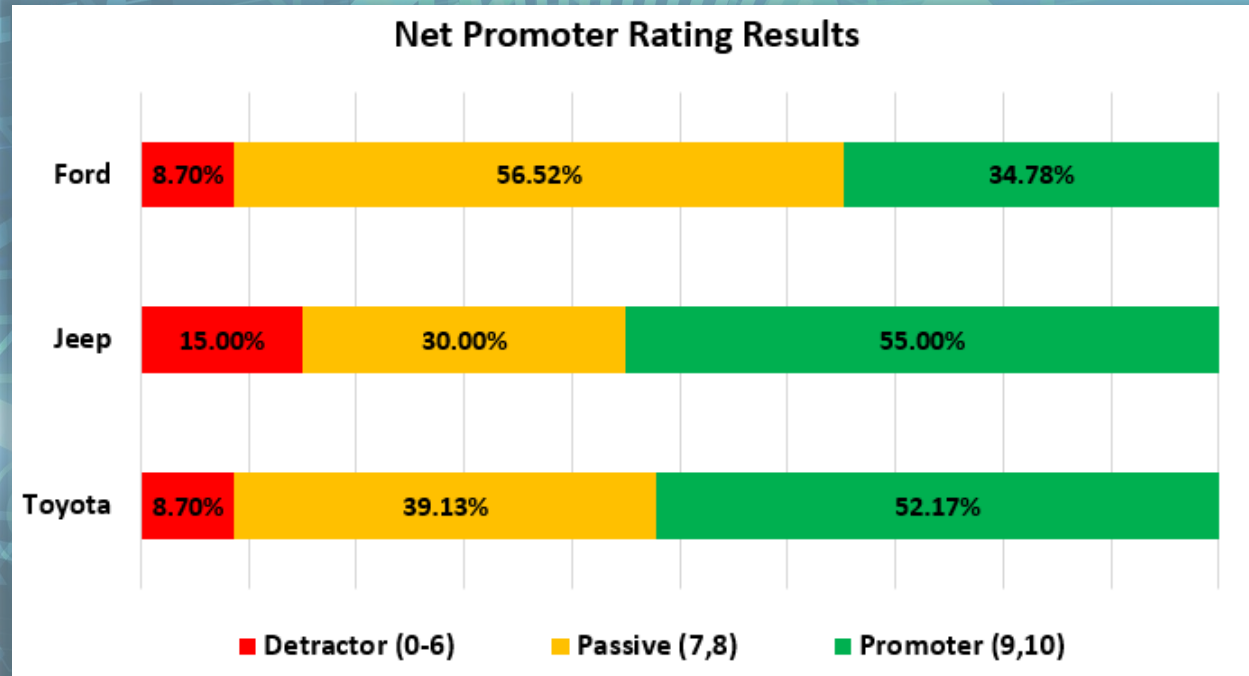
The Net Promoter Score (NPS) is an important metric for measuring the customer's experience through a rating of their likelihood to recommend based upon their experience.

*On a scale of 0 to 10, how would you rate your experience at this dealership?*

**Detractors** (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

**Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

**Promoters** (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth

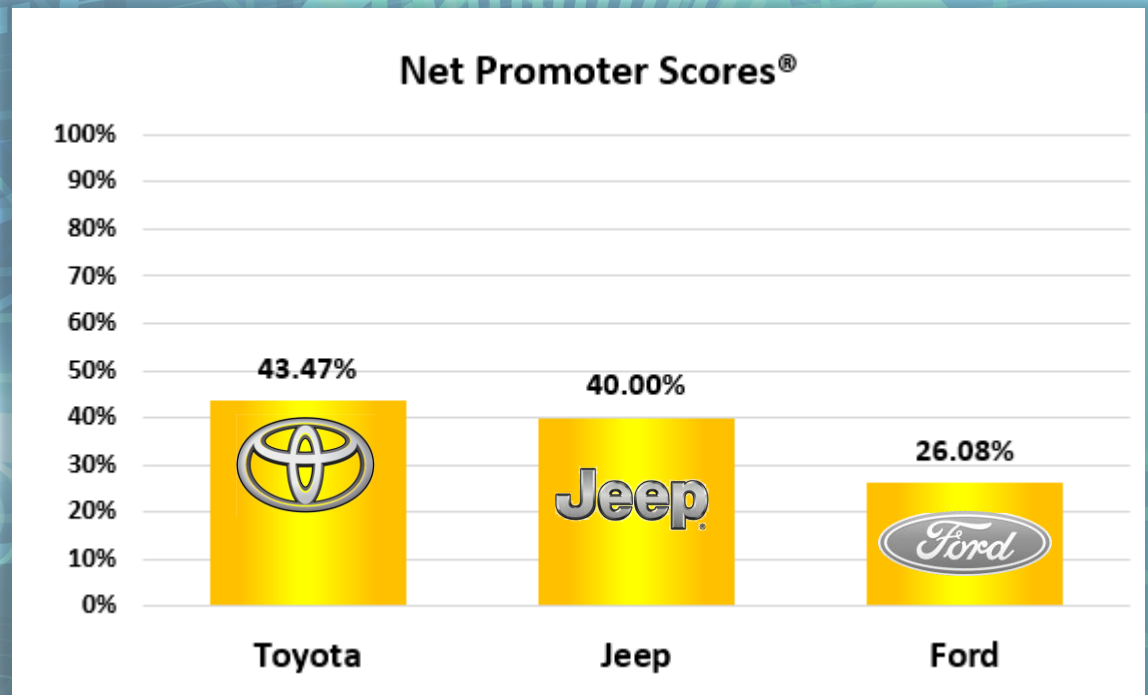


NPS scores in this study have high results in the Passive range.

Passive customers are more open to hearing about competitor value and offers. These results point to a large opportunity to move potential customers from one brand to another.



NPS is an absolute number, which is equal to the difference between percentage of Promoters and Detractors



In this study, once the passive results are removed from the picture, Toyota has the highest NPS score for recommendation based on the experience. Jeep is next with Ford trailing at a little over 25%.

# STUDY INSIGHTS



***Although this particular study is small in scope, the overall results show clear indications of a lack of positive outcomes in Key Performance Indicators during the sales process.***

***While 'reality is perception' in the Automotive Industry, a strategic place to update those perceptions is during buyer interactions with sales advisors.***

***Clearly, understanding what the potential buyer is looking for in a vehicle, how they will use the vehicle and what price range they are comfortable in, are all key aspects of moving a potential buyer into the direction of a purchase. Those points are being missed more than 40% of the time by all 3 brands.***

***Meeting buyers' specific needs while exceeding their perceptions is directly correlated to NPS scores across all areas.***



# STUDY HIGHLIGHTS



***Across these 3 brands, Toyota tends to show a better result, achieving the highest scores in most of the variables as well as showing a higher NPS index score. However, even then, Toyota sales advisors are leaving about 30% on the table when it comes to achieving key sales process goals.***



***In cases where the sales advisor is engaged, asking questions to learn about the customer needs in order to match the customer to the right car, the results show a direct correlation to more than 12% more positive outcome overall.***



***In the 10 countries tested, sales advisors compared their brand to others only 41% of the time on average. Again, sales persons are missing this large opportunity to clearly point out the positive results for buyers if they choose their brand.***



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A close-up photograph of a hand holding a white tablet. The tablet screen displays the BARE INTERNATIONAL logo, which consists of the word 'BARE' in a large, serif font, followed by a dark blue square icon containing a white document with a folded corner. Below this, the word 'INTERNATIONAL' is written in a smaller, sans-serif font. At the bottom of the screen, the tagline 'Revealing the True Nature of Business' is visible. The background of the image is a blurred blue and white pattern, possibly representing data or a business environment.

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# CUSTOMER SATISFACTION BENCHMARK STUDY

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