



Women's Attitudes to Car Servicing

Qualitative Research Findings

November 23, 2006





Objectives

- Explore women's attitudes towards car servicing and establish –
 - Behavioural/attitudinal patterns towards:–
 - Franchised garages;
 - Independent garages;
 - Underlying reasons for such behaviour and attitudes/beliefs;
 - Recommend appropriate counter-measures, as necessary.



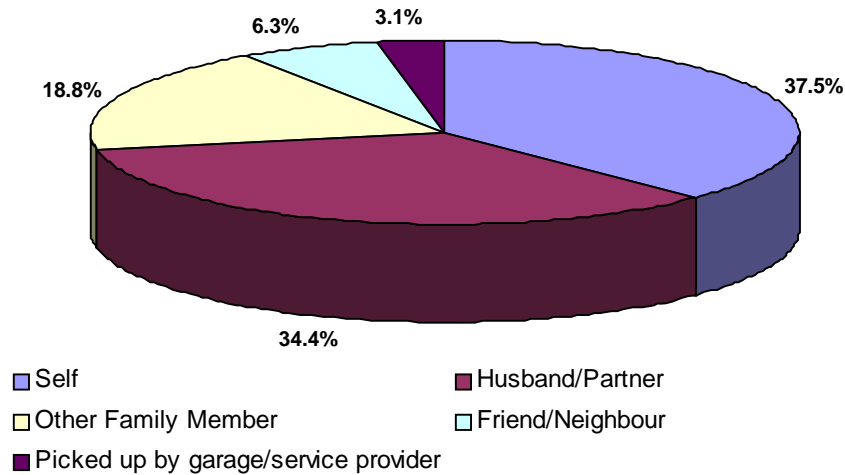
Sample Details & Methodology

- A combination of customer groups covering:-
 - Users of franchised dealers;
 - Users of independent and fast-fit garages;
 - Owners of volume vehicles;
 - Blue and white collar workers (B,C1,C2).



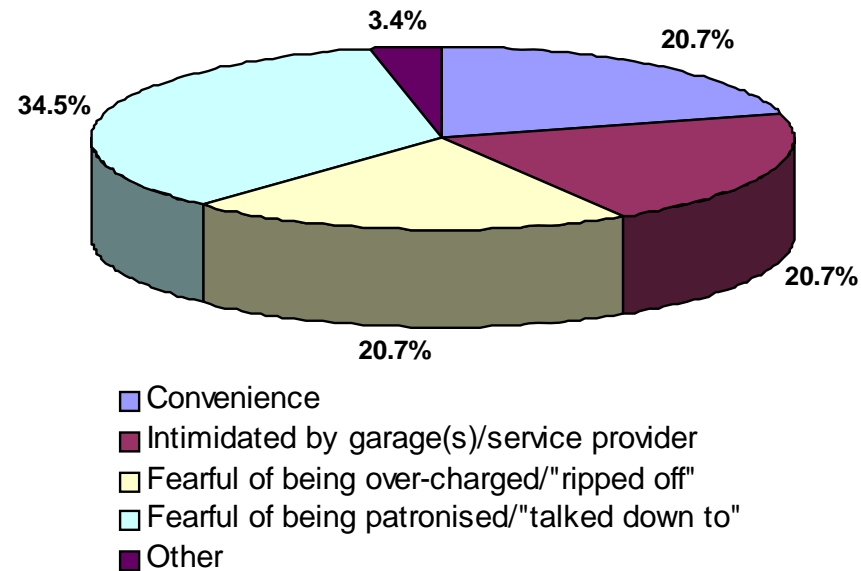
Research Findings Summary

Who takes your car to be serviced?



- Most women (59.5%) do not take their cars themselves to the garages for their servicing requirements – instead, they ask their family members/friends to take their car to the garage;
- This demonstrates, from the customer perspective, that women lack confidence when going to garages and, from the business perspective, that dealers are not exploiting courtesy cars (or pick-up & delivery) as a potentially marketing tool to generate more business.

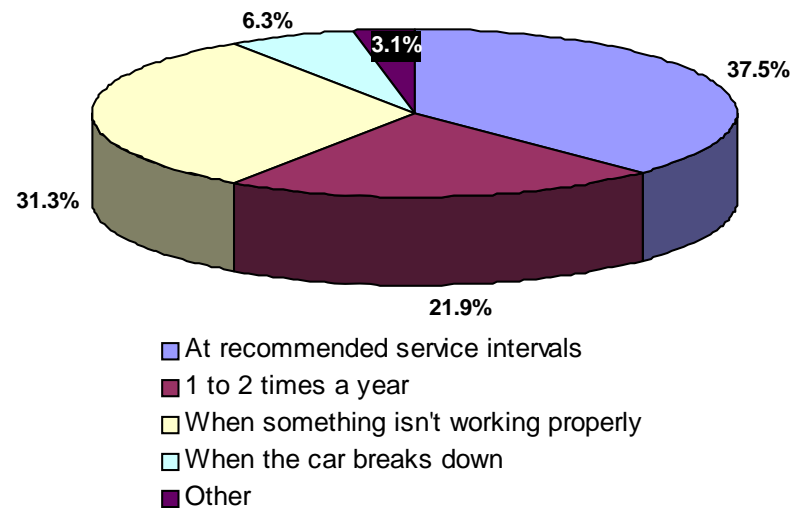
If someone other than you takes your car to be serviced, why is that?



- Only 20.7% claim that the main reason is convenience.
- Almost 76% of respondents confirm that the main reason for women asking their family or friends to take their cars to the garages is their fear of being either overcharged, patronised and/or intimidated.
- This results in the motor trade being viewed as a masculine arena and leads to the major alienation of a large number of female customers.

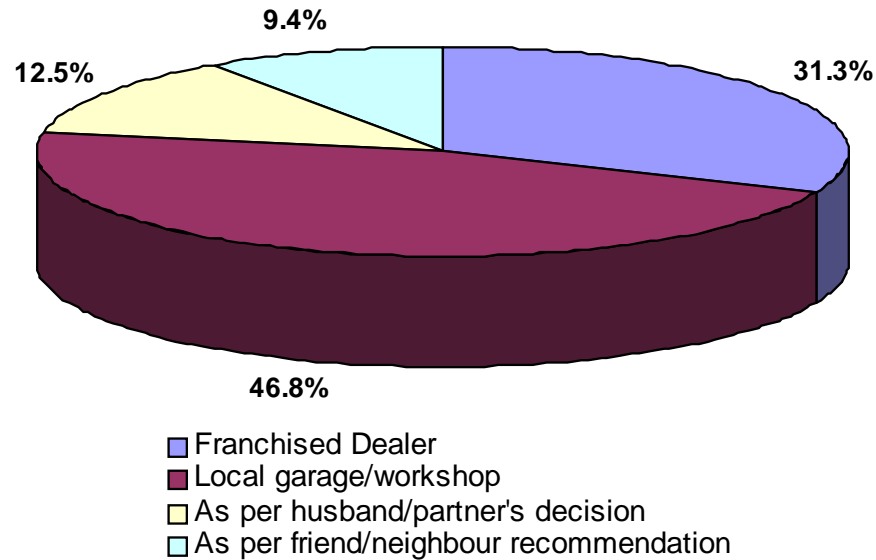


How often do you have your car serviced?



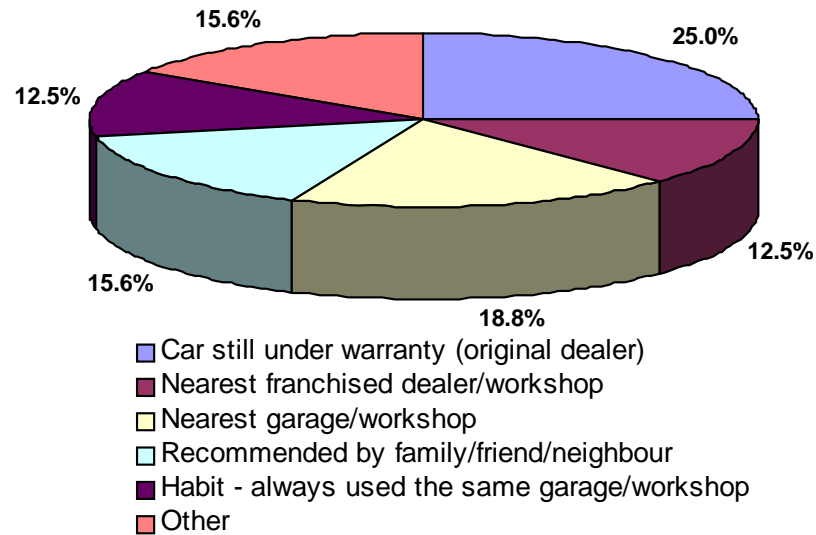
- Whilst majority of the female respondents (37.5%) have their cars serviced according to the recommended service intervals, it seems that garages do not necessarily use pre-emptive actions to help their customers (36.4% respondents) avoid breakdowns;
- This, arguably, is a result of the lack of communication between garages and their female customers;
- To ensure customers understand the processes and the importance of maintenance work, customer education should be prioritised at every garage to ensure that Service Advisors incorporate and use jargon-free communication with their customers so that customer understanding of their processes and procedures is easy.

What type of service provider do you ordinarily use?



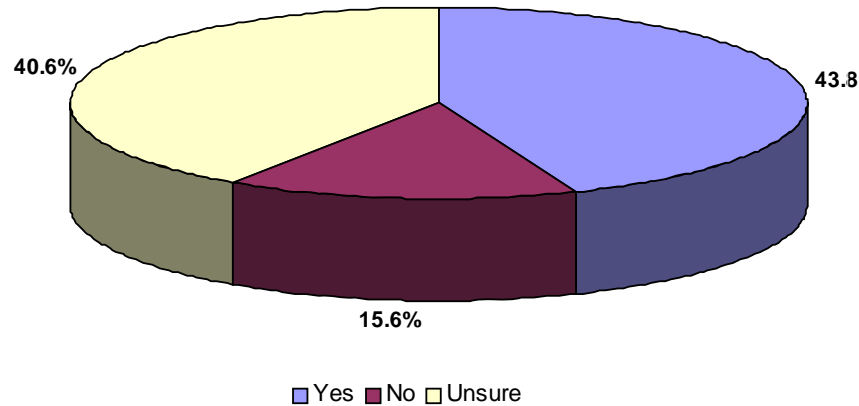
- The fact that vast majority (46.8%) of women use non-franchised garages for their car maintenance needs is generally in line with the overall aftermarket status-quo;
- Interestingly, nearly 22% of all respondents rely on the advice of their family members and/or friends; this 'grey area' may be an opportunity for both franchised and independent garages to exploit, given they become friendlier towards women customers.

Why do you use your current service provider?



- With 25% of respondents visiting franchised dealers to handle their warranty claims, proximity is a fairly advantageous feature for both franchised (12.5%) and independent repairers (18.8%);
- Unsurprisingly, customer experience is a major factor, as almost one-third of respondents were ready to travel to their recommended garage (15.6%) or go the garage of their habitual use (12.5%);
 - this is particularly of great importance to the franchised network, as proximity & coverage density are among their main weaknesses.

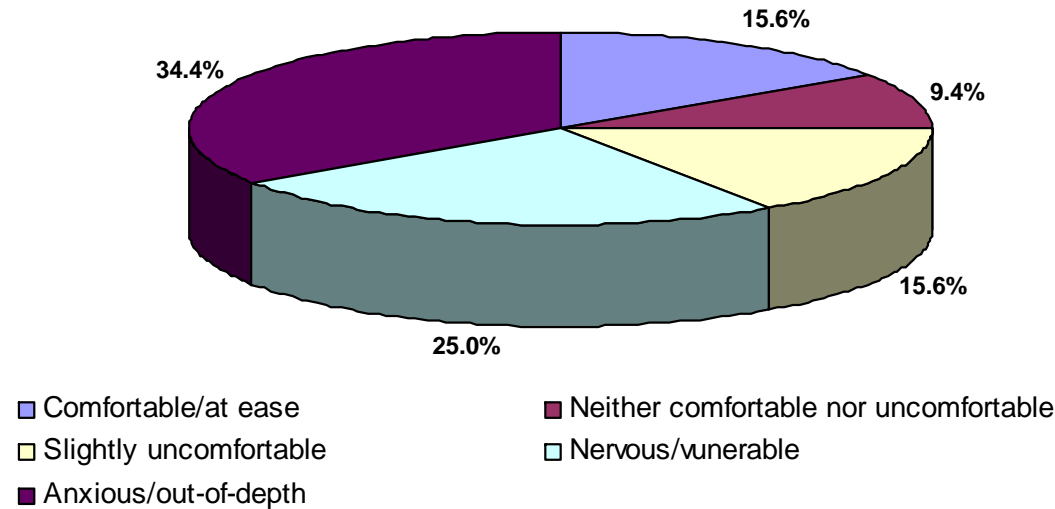
Do you trust them?




- When asked whether they trusted their garages, less than half of the women polled said 'yes', with 15.6% giving a negative answer and a significant 43.8% being unsure.
- Surprisingly, amongst those respondents who did not trust their garages, 80% were critical of the franchised dealer network.
- The worst news for manufacturers is that 62.5% of women drivers have started to question franchised dealers' integrity and to distrust franchised garages although still using them for under-warranty work and maintenance.
- Amongst those 43.8% of women who do trust their garages, only 21% do so in regard to franchised dealers, with the remaining 79% trusting independents.



How do you feel when you walk into the garage/Service Reception?



- With 15.6% of female respondents feeling comfortable/at ease when visiting garages, it is worth noting that 40% of these women feel confident because they are visiting a recommended garage.
- Hence, trust building between garages and their customers is the most important factor and the key factor in bringing customers into the comfort zone when dealing with the garages.



Recommendations & Conclusion



Research Value & Application

- With research having identified the major concerns for both franchised & independent sectors, it is car manufacturers who must take action to ensure their long-term survival, since:-
 - Women have a major say in choosing A-, B-, or C-sector cars, representing about 50% of the whole market
 - By satisfying female customers and addressing their aftersales concerns and anxieties, manufacturers would make a big step to ensuring repeated new car and aftersales purchases and, hence, securing their growth sustainability.
 - Failure to address the issues identified in this research are likely to result in the loss of millions of pounds worth of profits and the creation of negative long-term consequences.



Recommendations

- Future prosperity of the franchised dealers and independent repairers is dependant on the trust and depth of their relationships with the customers.
- Hence, in order to sustain long-term growth and competition, it is important that manufacturers develop strategies and approaches that would enable them to nurture and deepen their relationships with their customers base.
- The first step in this direction should be for manufacturers to start implementing the detailed strategy targeting the development of their networks Service Advisors and Service Managers.



Recommendations

- **Manufacturers have to also ensure that Dealer Principals are aware of the impact that Service Advisors have upon their long-term business growth and general profitability, and that they are urged to build trustworthy relationships with customers during the very important warranty period.**
- **Hence, manufacturers have to make sure that Aftersales Departments within dealerships understand that they play an important and vital role as the “pre-sales” function for future repeat purchases.**