



2019

WOMEN'S CAR BUYING REPORT AT TOP 7 US AUTO BRANDS

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INTRODUCTION

RE • SID • U • AL

Adjective - An internal after effect of experience that influences later behavior

EX • PE • RI • ENCE

Noun - Encounter or event

When someone walks off a dealership's lot, what is their residual of the experience? The entire visit or conversation might not stay with them, but the residual customer experience (CX) will fuel their feelings about the brand and business - and helps executives gain insight into what KPI's to emphasize and where to improve.

In this comprehensive report, women's CX are explored pre-, during-, and post- sales. Based on 5,391 car dealer reviews and the proprietary *SurveySpark*® opt-in questions, 94% of women self-report on over 30 data points on their experience, behaviors and preferences of their visit.

The car reviews are tied to a brand for the top seven US automotive brands - Chevrolet, Ford, Jeep, Honda, Nissan, Subaru and Toyota.¹ The science of the predictive analytics shows the attitudes, obstacles and

opportunities with this largely untapped market. The data shows some new touch points and how sellers can develop pathways to improve solutions and retention.

Women now account for 45% of new car purchases – approaching a tipping point. With this segment responsible for buying 7.74² million new vehicles in 2018, dealers need to re-examine the 'one size fits all' approach to marketing and better tailor to an ever-growing base of customers. As the industry evolves, it is crucial for business leaders to have open and responsive systems to compete. Valuing these buyers – through effective and creative market strategies - will increase dealers' overall sales. To do so requires an honest dialogue and assessment using meaningful performance metrics about what works and what is missing.

ABOUT | JoinWomenDrivers.com is the industry's premier platform for attracting, engaging and increasing sales to women+families through research, ratings and reviews. The company provides SEO family-friendly content, inspiring social posts, and predictive analytics via *SurveySpark*®. This platform prepares new data and insight into the Purchasing, Service Drive and Shopping CX giving dealers and OEMs access into what to emphasize and where to improve. @JoinWomenDrivers

¹ GoodCarBadCar.com - New Cars Sold in 2018 by Brand, Jan 3, 2019. Brands in this report are shown in alphabetical order. .

² Based on 17.2M New Cars Sold in 2018, NADA Market Beat, December 2018.

WHEN SHOPPING



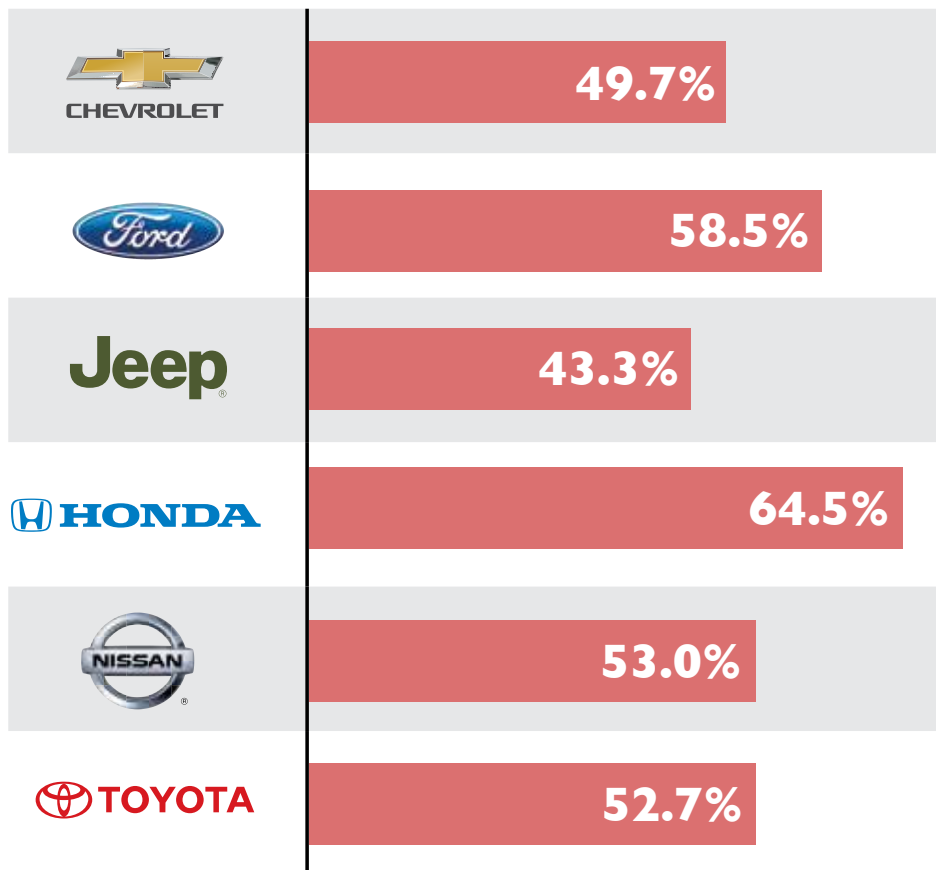
The Shopping CX results track when a customer visited a dealer - in person or via the website - and, did not buy. Almost 6 in 10 women who don't buy when they visit a dealer, don't return there. The main reason is "they didn't like the way they were approached or treated" and their expectations were not met.

While industry experts report that customers visit 1.6 dealerships before buying, analyzing that statistic by gender tells a different story. Half of women report going to one dealership and buying a car. The other half, however, report going to an average of 3 dealers – nearly two times the industry norm. Research shows the first engagement is the only one that matters; there are no second chances.

Dealers track the sales they generate. But measuring lost sales can be equally imperative to dealer principals. Training and coaching the frontline team to adopt attitudes and greetings that women consider trustworthy, engaging and respectful is paramount.

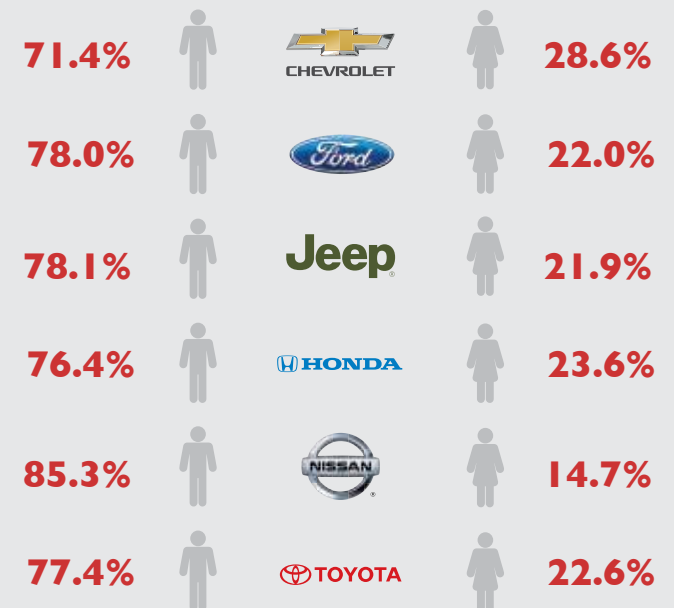
WHEN SHOPPING

PERCENT OF WOMEN THAT WENT TO THE DEALERSHIP UNACCOMPANIED

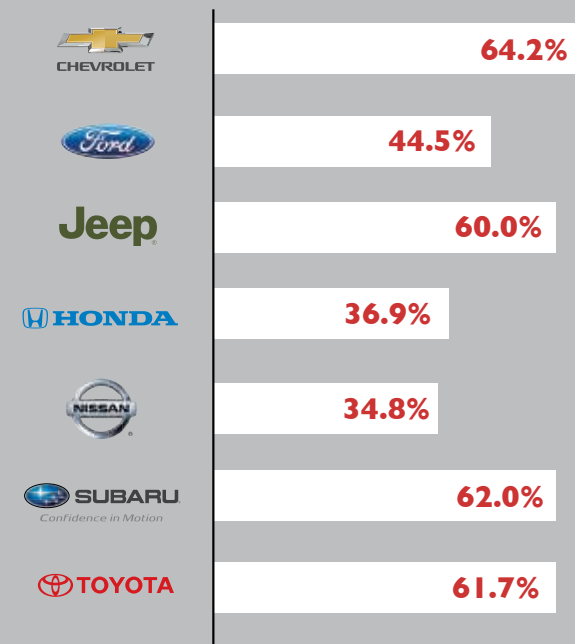


*Data for subaru is insufficient for Shopping.

OF THOSE ACCOMPANIED BY ANOTHER % THAT WENT WITH A MAN VS. % THAT WENT WITH A WOMAN



PERCENT OF SHOPPERS THAT ENDED UP BUYING AT THIS DEALERSHIP



WHEN PURCHASING



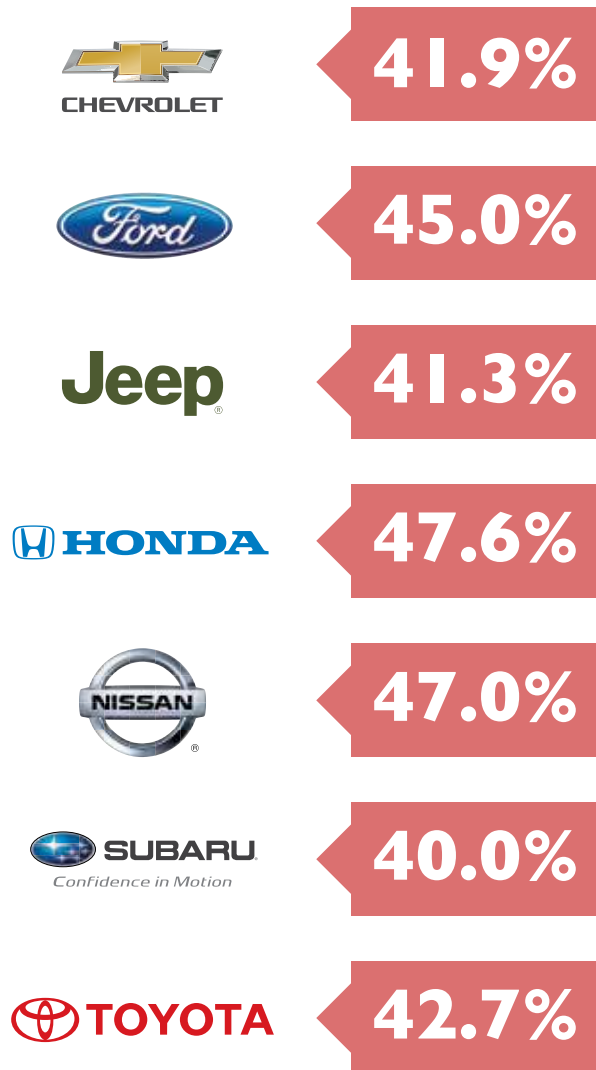
As consumer behavior has an impact on the vehicle models manufactures are producing, consumers also have a hand in changing the expectations of the car buying experience. Empowered women shoppers who may or may not be breadwinners now expect more from their visit. Dealership culture has seen a shift, but the data shows more must be done to recruit and retain women buyers and meet their unique expectations and needs.

To understand whether your culture and CX match, going beyond CSI is a must. Start with having a healthy dialogue with employees of all levels, but especially at the very front lines. They hear the most direct feedback daily. Pay attention to Social Media. How are customers and the community reacting to your business? It is important to note that as you listen, make sure to follow through with course correcting initiatives. If problems persist after someone has promised a resolution, it becomes harder to steer the ship back. When investigating the micro, don't forget the macro.

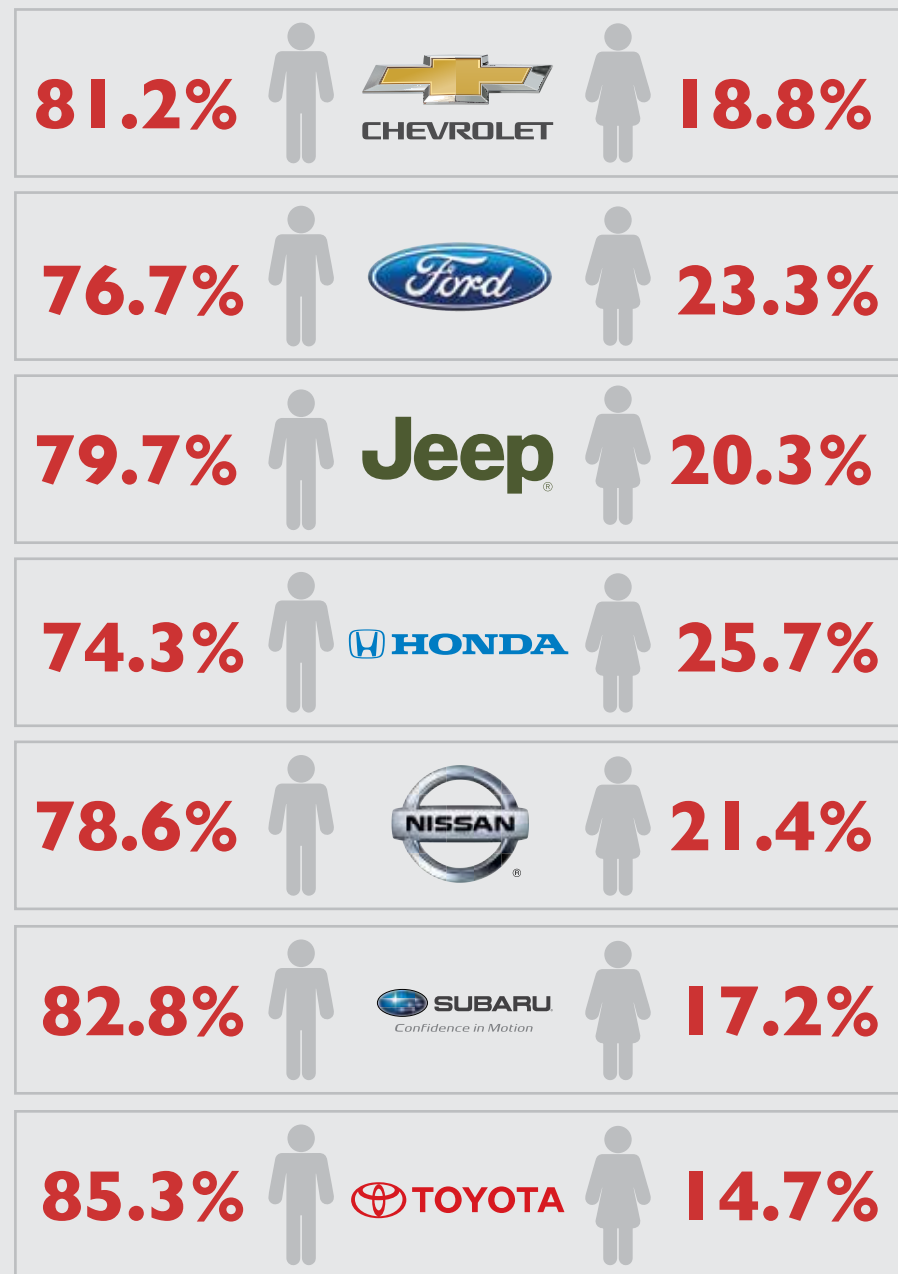
Be relevant and distinguish your store by communicating how you provide a total solution – beyond the mundane “price and best people”. Why? Because these are dated, watered-down messages in a sea of noise. Ads that are exclusively price driven continue to ignore what the decision-maker is looking for during her automotive consumer journey – trust and a truly great CX.

WHEN PURCHASING

PERCENT OF WOMEN THAT WENT TO THE
DEALERSHIP UNACCOMPANIED AND PURCHASED



OF THOSE ACCOMPANIED BY ANOTHER
% THAT WENT WITH A MAN VS. % THAT WENT WITH A WOMAN



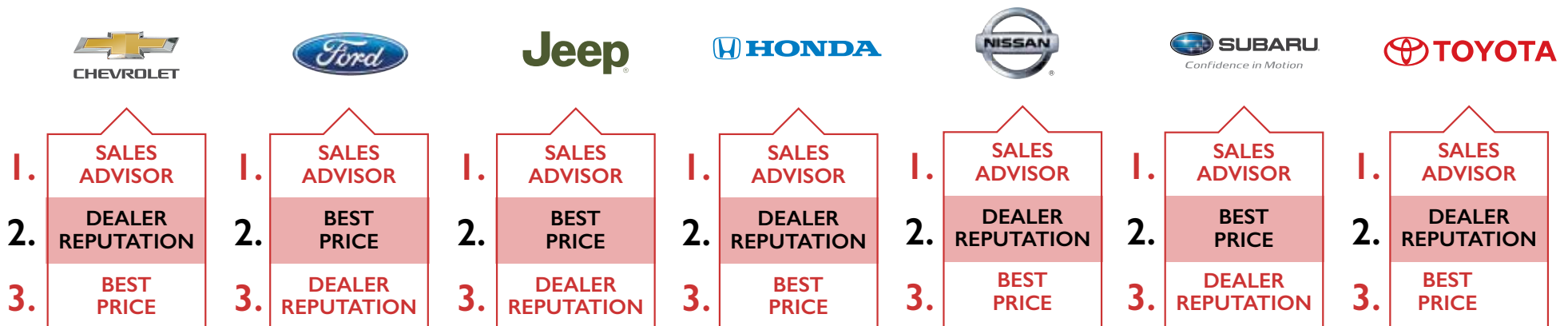
WHEN PURCHASING



Trust tops the list of reasons why women buy from their sales consultants – and their consultant is the #1 influencer at a dealer. Price is still important, but not a differentiator, since women know they can find a car elsewhere within a narrow price margin. It is the consultant's attitude and impression that makes all the difference. The initial contact and the creation of trust is critical to establishing credibility and making an outstanding first impression.

Women use dealer reviews 50% more than men³. These reviews help shape beliefs and interest about visiting your store. But reviews also are a key part of your brand and reputation building and are a vital component for improving the CX. Consider having a special section for women customers on your website where they can read authentic reviews by other women who have visited. This allows them to focus on what matters when they shop and buy. Service reviews are equally important, since customers can be uneasy when coming in for service or repairs and want to have rapport and trust with their advisor.

TOP 3 REASONS WOMEN BOUGHT AT THIS DEALERSHIP



³ Ipsos Socialouge Poll, 2014

WHEN PURCHASING

Successful sales consultants with high EQ understand their job is to listen closely and assist, not pressure or convince. They are there to 'get' and 'guide' the buyer.

UNSATISFIED WITH
CONSULTANT'S GREETING

FELT PRESSURED BY
SALES CONSULTANT

UNSATISFIED WITH
CONSULTANT'S LISTENING



5.2%

8.9%

7.1%



9.1%

8.4%

12.0%



3.5%

8.4%

3.4%



4.0%

8.1%

6.6%



6.0%

10.9%

10.9%



8.1%

8.5%

7.1%



4.8%

5.7%

5.0%

WHEN PURCHASING

AVERAGE NUMBER OF DEALERSHIPS VISITED WHEN BUYING



1.70



1.82



1.57



1.70



1.73



1.92



1.67

Creating an atmosphere where the buyer feels welcome, understood, and has the experience of being in control of their buying experience are the ingredients to a successful sale. A woman's recommendation is a sales consultant's highest compliment and creates more business opportunity for that store and the individual. Satisfied customers talk about their experience and recommend the business to those in their circle and social sphere.

TOP 2 WAYS WOMEN HEARD ABOUT THEIR DEALERSHIP

PERCENTAGES ARE OUT OF 100%



1. PRIOR PURCHASE | 29.5%
2. FRIENDS & FAMILY | 26.6%



1. PRIOR PURCHASE | 28.5%
2. FRIENDS & FAMILY | 25.3%



1. FRIENDS & FAMILY | 31.5%
2. PRIOR PURCHASE | 28.6%



1. FRIENDS & FAMILY | 28.2%
2. PRIOR PURCHASE | 23.0%



1. FRIENDS & FAMILY | 28.5%
2. PRIOR PURCHASE | 17.7%



1. FRIENDS & FAMILY | 27.0%
2. PRIOR PURCHASE | 22.4%







1. PRIOR PURCHASE | 28.7%
2. FRIENDS & FAMILY | 22.7%

WHEN PURCHASING

TOP 7 EMOTIONS FELT DURING BUYING PROCESS

Buying a vehicle creates a range of feelings and emotions that women self-report. 'Excited' was at the top of the list for all brands, so it was removed to level the playing field. Maintaining high 'relaxed and confident' levels are the most important to help the negotiation proceed towards a sale. Successful front-line consultants bring forth more positive emotions from buyers and create a better overall experience. It's natural to be 'apprehensive and nervous' about buying a car; it is a top buying decision in any person's life. Mitigating anxiety can be achieved by ensuring a customer doesn't become overwhelmed by too many choices. Successful consultants are keen observers of body language.

Boosting 'confidence' keeps the dialogue and interest on track. Confident buyers ask questions and reach a decision more quickly.

 1. Confident 2. Apprehensive 3. Relaxed 4. Nervous 5. Overwhelmed 6. Intimidated 7. Confused	 1. Relaxed 2. Confident 3. Nervous 4. Apprehensive 5. Overwhelmed 6. Intimidated 7. Frustrated	 1. Relaxed 2. Apprehensive 3. Nervous 4. Confident 5. Overwhelmed 6. Intimidated 7. Frustrated	 1. Apprehensive 2. Confident 3. Nervous 4. Relaxed 5. Overwhelmed 6. Intimidated 7. Confused
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WHEN PURCHASING

Half of women consumers go to one dealer when buying a car; the other half visit nearly three dealerships. Further, 60% of women report buying a car from outside their home turf dealership.

	AVERAGE # OF MILES TRAVELED TO DEALERSHIP	AVERAGE TIME AT DEALERSHIP BUYING CAR	CLOSEST DEALERSHIP TO HOME FOR BRAND PURCHASED
 CHEVROLET	21.7 MILES	2 HOURS 43 MINS	37% - YES 63% - NO
 Ford	19.9 MILES	2 HOURS 39 MINS	39% - YES 61% - NO
 Jeep	22.5 MILES	2 HOURS 26 MINS	31% - YES 69% - NO
 HONDA	15.9 MILES	2 HOURS 42 MINS	43% - YES 57% - NO
 NISSAN	23.7 MILES	2 HOURS 52 MINS	47% - YES 53% - NO
 SUBARU <small>Confidence in Motion</small>	21.7 MILES	3 HOURS	47% - YES 53% - NO
 TOYOTA	20.6 MILES	2 HOURS 45 MINS	54% - YES 46% - NO








DIGITAL

A dealer's website is the #1 site women use when buying a car. That's the good news. Nationally, however, they rated dealerships websites at 76% or a "C" in being helpful and informative. Collectively, OEMs, web providers and dealers have work to do to bridge the gap to add value.

Most dealer websites continue to be pictorially product-centric. Consumers engage more fully when they feel welcomed by lifestyle images from various cultures, life-stages and demographics. Informative content about car buying and the ownership experience draws viewers in and establishes credibility to the CX. High SEO-owned content allows for greater interaction with the dealer brand. This digital and social marketing strategy adds stickiness and is a way to stand out.

Sight is the top sense consumers utilized here – visual platforms with clean design, consumer images and video create trustworthiness and engage viral guests.

TOP 5 WEBSITES WOMEN RESEARCHED BY BRAND

	1. Dealer
	2. OEM
	3. KBB
	4. AutoTrader.com
	5. Consumer Reports
	1. Dealer
	2. OEM
	3. KBB
	4. AutoTrader.com
	5. Carfax
	1. Dealer
	2. KBB
	3. OEM
	4. AutoTrader.com
	5. Edmunds
	1. KBB
	2. Dealer
	3. OEM
	4. Edmunds
	5. Consumer Reports
	1. KBB
	2. Dealer
	3. OEM
	4. Consumer Reports
	5. Cars.com
	1. OEM
	2. KBB
	3. Dealer
	4. Consumer Reports
	5. Edmunds
	1. Dealer
	2. KBB
	3. OEM
	4. Consumer Reports
	5. Carfax

DIGITAL

FOUND DEALER'S WEBSITE
HELPFUL & INFORMATIVE



84.6%



87.3%



76.7%



75.7%



83.7%










89.3%



80.0%

DIGITAL










						 SUBARU <small>Confidence in Motion</small>	
VISITED DEALERS FACEBOOK PAGE	49.3%	48.1%	44.7%	33.4%	47.3%	28.6%	28.0%
SAID POSTS WERE HELPFUL; OF INTEREST	87.3%	92.8%	92.2%	64.7%	88.9%	81.8%	74.6%
BECAME A FAN OR LIKED FACEBOOK PAGE	73.6%	76.4%	72.0%	54.5%	85.3%	61.1%	64.1%

WHEN AT SERVICE DRIVE

Most customers don't look forward to the task of bringing a vehicle in for service as it takes time out of the day and typically is an inconvenience. For a dealership, service revenue is huge to the bottom line, and helps thread customer retention. But women report a vast drop-off in communication, performance or expectations resulting in reduced profits for your dealership.

Nationally, 25% of women report that the amount paid was not consistent with the estimate received. Using new metrics to gauge the follow-up and trust level of interactions will increase retention and help your business realize a new future.



	 CHEVROLET			 HONDA	 NISSAN	 SUBARU Confidence in Motion	 TOYOTA
REPORTED THEY WON'T USE THIS SERVICE CENTER IN THE FUTURE	17.4%	8.2%	8.8%	11.5%	17.9%	8.9%	18.0%
DID NOT RECEIVE FOLLOW-UP COMMUNICATION AFTER SERVICE VISIT	20.4%	9.7%	28.5%	18.0%	32.1%	23.2%	23.9%
% OF BUYERS THAT WANT AN OVERNIGHT VEHICLE	69.5%	62.8%	69.5%	69.9%	66.3%	79.7%	67.6%