



NADA Winter 2024 Dealer Attitude Survey Aid

We need to hear from you!

Your opinion is shared directly with your brand's senior leadership by NADA.

Go to www.nadasurvey.com for more information.

The Survey Aid below lets you see and share the questions on the current survey.

Since 1985, the NADA-designed and operated Dealer Attitude Survey has provided a valuable, anonymous tool to let dealers share their opinions about their manufacturers and the dealer-OEM relationship. Survey data is presented by NADA staff to each manufacturer, always accompanied by a NADA Board Director who owns that franchise.

NADA encourages you to involve your department managers in completing the survey.

General Instructions

Please answer the Franchise, Value, Policy, Finance and People Sections for each new vehicle franchise you sell at this dealership.

Please fill in the bubble for the franchise you are filling out the survey for:

<input type="radio"/> Acura	<input type="radio"/> Chrysler	<input type="radio"/> Infiniti	<input type="radio"/> Mazda	<input type="radio"/> Subaru
<input type="radio"/> Alfa Romeo	<input type="radio"/> Dodge	<input type="radio"/> Jaguar	<input type="radio"/> Mercedes-Benz	<input type="radio"/> Toyota
<input type="radio"/> Audi	<input type="radio"/> Fiat	<input type="radio"/> Jeep	<input type="radio"/> MINI	<input type="radio"/> Volkswagen
<input type="radio"/> BMW	<input type="radio"/> Ford	<input type="radio"/> Kia	<input type="radio"/> Mitsubishi	<input type="radio"/> Volvo
<input type="radio"/> Buick-GMC	<input type="radio"/> Genesis	<input type="radio"/> Land Rover	<input type="radio"/> Nissan	
<input type="radio"/> Cadillac	<input type="radio"/> Honda	<input type="radio"/> Lexus	<input type="radio"/> Porsche	
<input type="radio"/> Chevrolet	<input type="radio"/> Hyundai	<input type="radio"/> Lincoln	<input type="radio"/> RAM	

Confidential

User ID: _____ (7 digits)

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Current Topics – EV Adoption

NADA continues to monitor EV adoption challenges. Your input here helps NADA address this issue not only with your manufacturer, but also with the federal regulatory and legislative bodies that influence EV adoption.

Please choose the top 5 consumer hurdles to EV adoption that you are seeing in your showroom:

- ☐ EV Purchase Price (lease or buy)
- ☐ EV Cost of Ownership (charging, maintenance, insurance, etc.)
- ☐ Understanding Charging (home or public)
- ☐ EV Incentives (lease or buy)
- ☐ Driving Range
- ☐ No vehicles in consumer's desired segments (lifestyle)
- ☐ Perception of the brand
- ☐ Vehicle quality
- ☐ Market/marketing awareness
- ☐ Local utility electricity plans
- ☐ EV reliability concerns
- ☐ EV safety concerns
- ☐ EV environmental benefits/concerns
- ☐ Availability of local charging stations
- ☐ Long charging times

Are there other consumer EV adoption hurdles that you hear about that are not listed here?

With regards to Plug-In Hybrid Vehicles (PHEV)

[PHEV defined as: Vehicle containing an internal combustion engine and one or more electric engines whose battery can be recharged from an external electric power source]

Please indicate the degree to which you agree/disagree with the following statements concerning Plug-In Hybrid Vehicles (PHEV).

- My customers are familiar with Plug-In Hybrid vehicles
- My customers ask about Plug-In Hybrid vehicle options for my brand

- ☐ Strongly Agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly Disagree
- ☐ Not Applicable

Based solely on your market demand, (regardless of your current vehicle portfolio and excluding gas engine vehicles) would you encourage your manufacturer to invest more heavily in Plug-In Hybrids (PHEVs), Battery Electrics (BEVs), or invest equally?

I believe my manufacturer should invest:

- ☐ More heavily in PHEV
- ☐ Somewhat heavily in PHEV
- ☐ Equally
- ☐ Somewhat heavily in BEV
- ☐ More heavily in BEV

Do you have other comments about alternative powertrains?

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Value—Overall Attitude

Please indicate the degree to which you agree/disagree with the following statements concerning your franchise's **value**.

- The **value of my franchise** has increased over the **past 12 months**.
- The **value of my franchise** will increase over the **next 12 months**.
- My franchisor's **products are what customers want**.
- My franchisor's **product quality** is competitive.
- I am satisfied with my franchisor's efforts to retain loyal customers.
- I am satisfied with my franchisor's efforts to conquest new customers.

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

Rate the value of your franchise on a **scale of 1 to 10**, where 1 is low and 10 is high. _____

Value—Detailed Issues and Attitudes

Please indicate the degree to which you are satisfied/dissatisfied with the following:

Evaluate your franchisor's **current product** in the following areas:

- Product reliability in first 90 days
- My franchisor's policy on warranty goodwill is flexible enough to meet my customer satisfaction needs.

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Evaluate your franchisor in the areas of **vehicle distribution**:

- Fairness

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

Please indicate the degree to which you agree/disagree with the following statements concerning your franchisor in areas of vehicle distribution:

- My franchisor provides an effective mechanism to track new vehicles in transit.

Please indicate the degree to which you are satisfied/dissatisfied with the following:

Evaluate your franchisor's **marketing efforts**:

- Overall Satisfaction
- New Vehicle Digital Marketing

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Policy—Overall Attitude

Please indicate the degree to which you agree/disagree with the following statements concerning your franchisor's **policies**.

- My franchisor sales and service policies support my efforts to achieve customer satisfaction
- My franchisor sales and service policies and procedures are fair
- My franchisor **considers dealer input** before making decisions that affect dealers
- My franchisor is **easy to do business** with

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

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Policy—Detailed Issues and Attitudes

Evaluate your franchisor's **responsiveness to dealer input** in the following areas:

- Product
- Product quality
- Tier 3 (local/market) advertising

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Please indicate the degree to which you agree/disagree with the following statements concerning your franchisor's **dealer relations communications and efforts**:

- I understand the top working priorities of my dealer Council/Advisory Board

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

Please indicate the degree to which you are satisfied/dissatisfied with the following statements concerning your franchisor's **dealer relations communications and efforts**:

- Franchisor to dealer communications
- Dealer Council to dealer communications
- Overall Satisfaction with dealer relations

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Please indicate the degree to which you agree/disagree with the following statements concerning your franchisor's **policies**.

- My franchisor's **customer satisfaction system** of rating my dealership is fair

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

Please indicate the degree to which you agree/disagree with the following statements concerning your franchisor's policies.

- My franchisor's recognition and incentive programs motivate my dealership personnel

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree
☐ Not Applicable

Please indicate the degree to which you are satisfied/dissatisfied with the following statements concerning your franchisor's policies.

Evaluate your franchisor's **new vehicle sales incentives**:

- Industry competitiveness
- Fairness to my dealership
- Fairness to dealers of all sizes
- Efforts to avoid complexity
- Competitiveness of new vehicle leasing plans and programs

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Evaluate your franchisor's **certified used car program**:

- Overall value of the program

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Please select the answer option(s) that best describe your situation regarding **parts operations**:

- ☐ Stock order availability is an issue
- ☐ Recall parts order availability is an issue
- ☐ I have no major parts supply issues

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Finance

Do you use your franchisor's **captive/manufacturer preferred finance source**? Yes ☐ No ☐

If **yes**, do you use your captive finance company for your vehicle floorplan? Yes ☐ No ☐

If yes, evaluate your franchisor's captive/manufacturer preferred finance arm:

- Overall satisfaction
- Purchase policy consistency
- Finance approval transaction time
- As floor plan source (if applicable)
- Lease-end processes
- Effectiveness of auto-decisioning/deal approval system
- Credit buyers/analyst support
- Branch office/sales personnel support
- Online dealer support

Very Satisfied
Satisfied
Neutral
Dissatisfied
Very Dissatisfied

Please select a non-captive lender that you use from the list below to evaluate.

<input type="radio"/> 5th 3rd Bank	<input type="radio"/> Credit Acceptance Corp.	<input type="radio"/> Truist (formerly BB&T & SunTrust)
<input type="radio"/> Ally Financial	<input type="radio"/> Exeter Finance Corp.	<input type="radio"/> TD Auto Finance
<input type="radio"/> Bank of America	<input type="radio"/> Huntington National Bank	<input type="radio"/> US Bank
<input type="radio"/> Bank of the West	<input type="radio"/> PNC Bank	<input type="radio"/> Wells Fargo Dealer Services
<input type="radio"/> BMO Harris Bank NA	<input type="radio"/> RBS Citizens	<input type="radio"/> World Omni Financial
<input type="radio"/> Capital One Auto Finance	<input type="radio"/> Regional Acceptance	<input type="radio"/> My non-captive lender is not on this list
<input type="radio"/> Chase Auto Finance	<input type="radio"/> Santander Consumer USA	

Do you use your non-captive finance company for your vehicle floorplan? Yes ☐ No ☐

If yes, evaluate your non-captive lender on the following:

- Overall satisfaction
- Purchase policy consistency
- Finance approval transaction time
- As floor plan source (if applicable)
- Lease-end processes
- Effectiveness of auto-decisioning/deal approval system
- Credit buyers/analyst support
- Branch office/sales personnel support
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Satisfied
Neutral
Dissatisfied
Very Dissatisfied

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People—Evaluation

Please indicate the degree to which you are satisfied/dissatisfied with the following:

Evaluate your franchisor's **national senior management**:

- Overall effectiveness
- Accessibility to dealers

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Evaluate your franchisor's **regional management**:

- Overall effectiveness
- Accessibility to dealers
- Communication adds value

☐ ☐ ☐ ☐ ☐

Please indicate the degree to which you agree/disagree with the following statements concerning your franchisor's **people**.

- The **sales contact** of this franchise is helpful.

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

Please indicate the degree to which you are satisfied/dissatisfied with the following:

Evaluate your franchisor's **sales contact** in the areas of:

- Fulfillment of commitments
- Decision-making authority
- Accessibility

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Please indicate the degree to which you agree/disagree with the following statements concerning your **franchisor's people**.

- The **Fixed Operations (Service & Parts) contact** of this franchise is helpful.

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

Please indicate the degree to which you are satisfied/dissatisfied with the following:

Evaluate your franchisor's **fixed operation contact** in the areas of:

- Handling of customer complaints
- Fulfillment of commitments
- Decision-making authority
- Accessibility

☐ Very Satisfied
☐ Satisfied
☐ Neutral
☐ Dissatisfied
☐ Very Dissatisfied

Evaluate your franchisor's **sales training efforts**:

- OEM sponsored training meets my needs

☐ ☐ ☐ ☐ ☐

Evaluate your franchisor's **fixed operation training efforts**:

- OEM sponsored training meets my needs
- My franchisor supports **my efforts** for technician recruitment

☐ ☐ ☐ ☐ ☐

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Future

Please indicate the degree to which you agree/disagree with the following statements concerning your franchisor's **future strategy**.

- I trust the strategic direction of my OEM
- It is clear to me how my dealership fits in this future strategy
- I trust that current leadership can execute this strategy

☐ Strongly Agree
☐ Agree
☐ Neutral
☐ Disagree
☐ Strongly Disagree

Do you have comments to add?

Please help your franchisor's management better understand your responses. Take a moment to explain what you see as the most pressing issues for your dealership as well as your franchise. Your comments continue to provide important context to the survey scores. Your OEM management team pays close attention to these comments.

These responses ARE confidential. Not even NADA knows who writes which comment. If you ever have a concern with confidentiality, please email us at: industryrelations@nada.org

Did you feel pressure from your manufacturer personnel to answer this survey's questions in a specific way? Yes ☐ No ☐

If so, please tell us specifically what happened: