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## Now is a Critical Time for Automakers to Maintain Customer Confidence

*Clear differences in customer confidence and satisfaction exist between import and domestic vehicle owners*

**ROCHESTER, N.Y. – May 26, 2009** – Many historic events have taken place in the auto industry recently, and most of the automakers are getting negative press around them. The domestic automakers, however, are getting the lion's share of it. When the dust from this downturn settles, the automakers that consistently took care of their customers and gave them a reason to maintain confidence and trust in their brands will likely reap the rewards of strong satisfaction and loyalty. This will then culminate in higher sales.

Currently, almost three-quarters of Americans (72%) are extremely or very satisfied with the vehicle they drive, and four in five (80%) would recommend their vehicle to a friend or family member. When the results are compared across domestic and import vehicle owners, these metrics shift dramatically. Import vehicle owners overall are more satisfied with their vehicle, more likely to recommend it, and more confident in the company that stands behind it.

These are some of the findings of The Harris Poll, a new nationwide survey of 2,401 U.S. adults surveyed online between April 13 and 21, 2009 by Harris Interactive.

Slightly more than three-quarters (77%) of import vehicles owners are satisfied with their vehicle, while fewer (69%) of domestic vehicle owners are satisfied. While 86% of import owners would recommend their brand's line of vehicles to a friend or family member, 75% of domestic owners would do the same. Though opinions are shaped by many foundational aspects of experience and exposure to a vehicle brand, some of the recent trends in the auto industry are also playing a strong role in shaping vehicle owners' opinions. Some other findings are:

Maintaining a strong customer focus is critical. While automakers and dealerships continue to focus attention on their customers, their customers may not agree that it is business as usual. A little over three in five (63%) import owners agree that their vehicle's company sees them as a valued customer and just slightly fewer (58%) agree that their dealership is continuing to provide them with excellent customer service despite the tough economic conditions. Among domestic owners, close to half agree with each of these statements (48% and 49% respectively).

This time last year who would have thought that some longstanding vehicle brands would be on the verge of disappearing, and local dealerships for these brands as well as others would be closing? Looking forward, almost nine in ten (87%) import owners agree that the brand of vehicle they drive will still be in business 3 – 5 years from now and almost three-quarters (73%) agree that their primary dealership will still be in business during the same time frame. For domestic owners, only 70% agree that the brand of vehicle they drive will still be in business and just slightly more than half (54%) agree that their primary dealership will still be around.

- Having confidence in the management and direction of automakers is also critical in this environment. Only half (50%) of domestic vehicle owners have confidence in the management of the company for their vehicle and slightly more than half (53%) say that the company is moving in the right direction. Seven in ten (70%) import owners have confidence in the management of the company for their vehicle and about the same amount (72%) think the company is moving in the right direction.
- Of those who intend to buy or lease another new (not used) vehicle in the future, import owners are more likely to purchase the same brand than domestic owners (61% vs. 54%). Looking at the bigger picture, 85% of import owners will buy or lease another import brand, while 78% of domestic owners will buy or lease another domestic brand.

**So What?**

Maintaining the trust, satisfaction and confidence of customers is critical, especially when the market is struggling. It is clear that compared to domestic vehicle owners, import vehicle owners have higher levels of satisfaction, confidence and trust in their brands, and they are leaning toward purchasing the same brand or another import brand the next time they buy or lease a new vehicle. Domestic vehicle manufacturers which historically have the edge in new vehicle sales risk having that edge further erode if their customers continue to have lower levels of satisfaction with their buying and service experience, and lack trust and confidence in their future viability. Import vehicle manufacturers, though still struggling in this down market, have a unique opportunity now to not lose this edge and increase the gap between themselves and their domestic competitors. Capturing consumer trust and providing a superior customer experience will allow any automaker to maintain or improve its market position when these tough economic circumstances improve.

**TABLE 1**  
**SATISFACTION WITH CURRENT VEHICLE**

"How satisfied are you with your current [BRAND OF VEHICLE OWNED]?"

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
EXTREMELY/VERY SATISFIED (NET)	72	69	77
Extremely Satisfied	38	35	42
Very Satisfied	34	34	35
Satisfied	19	20	18
Somewhat Satisfied	7	9	4
Not At All Satisfied	2	2	1

Note: Percentages may not add up to 100% due to rounding

**TABLE 2**  
**AUTOMAKER WILL BE IN BUSINESS 3 – 5 YEARS FROM NOW**

"Please indicated how much you disagree or agree with the following statements about [BRAND OF VEHICLE OWNED]. I believe that [BRAND OF VEHICLE OWNED] will still be selling vehicles 3 – 5 years from now."

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
AGREE (NET)	77	70	87
Strongly Agree	47	35	63
Somewhat Agree	30	35	24
Neither Agree Nor Disagree	16	21	10
Somewhat Disagree	4	5	2
Strongly Disagree	3	4	1

Note: Percentages may not add up to 100% due to rounding

**TABLE 3**  
**RECOMMEND VEHICLE TO FRIENDS AND FAMILY**

"Please indicated how much you disagree or agree with the following statements about [BRAND OF VEHICLE OWNED]. I would recommend [BRAND OF VEHICLE OWNED]'s vehicles to friends and family."

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
AGREE (NET)	80	75	86
Strongly Agree	46	39	55
Somewhat Agree	34	36	31
Neither Agree Nor Disagree	14	17	9
Somewhat Disagree	4	5	2
Strongly Disagree	3	3	3

Note: Percentages may not add up to 100% due to rounding

**TABLE 4**  
**AUTOMAKER SEES ME AS A VALUED CUSTOMER**

"Please indicated how much you disagree or agree with the following statements about [BRAND OF VEHICLE OWNED]. I believe that [BRAND OF VEHICLE OWNED] sees me as a valued customer."

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
AGREE (NET)	55	48	63
Strongly Agree	27	24	30
Somewhat Agree	28	24	33
Neither Agree Nor Disagree	33	38	27
Somewhat Disagree	7	8	6
Strongly Disagree	5	6	4

Note: Percentages may not add up to 100% due to rounding

**TABLE 5  
DEALERSHIP SERVICE**

"Please indicated how much you disagree or agree with the following statements about [BRAND OF VEHICLE OWNED]. I believe that [BRAND OF VEHICLE OWNED]'s dealership continues to provide me with excellent service despite the tough economic conditions the automotive industry is going through."

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
AGREE (NET)	53	49	58
Strongly Agree	30	28	33
Somewhat Agree	23	21	25
Neither Agree Nor Disagree	37	41	31
Somewhat Disagree	5	4	6
Strongly Disagree	5	6	5

Note: Percentages may not add up to 100% due to rounding

**TABLE 6  
AUTOMAKER'S PRODUCTS ARE MOVING IN THE RIGHT DIRECTION**

"Please indicated how much you disagree or agree with the following statements about [BRAND OF VEHICLE OWNED]. [BRAND OF VEHICLE OWNED]'s products are moving in the right direction."

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
AGREE (NET)	61	53	72
Strongly Agree	30	24	38
Somewhat Agree	31	29	34
Neither Agree Nor Disagree	30	35	23
Somewhat Disagree	6	8	4
Strongly Disagree	3	4	1

Note: Percentages may not add up to 100% due to rounding

**TABLE 7  
CONFIDENCE IN AUTOMAKER'S MANAGEMENT**

"Please indicated how much you disagree or agree with the following statements about [BRAND OF VEHICLE OWNED]. I have confidence in the management of [BRAND OF VEHICLE OWNED]."

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
AGREE	58	50	70
Strongly Agree	27	21	36
Somewhat Agree	31	29	34
Neither Agree Nor Disagree	30	34	24
Somewhat Disagree	8	11	4
Strongly Disagree	4	5	2

Note: Percentages may not add up to 100% due to rounding

**TABLE 8**

**PRIMARY DEALERSHIP I USE WILL BE IN BUSINESS 3 – 5 YEARS FROM NOW**

"Please indicated how much you disagree or agree with the following statements about [BRAND OF VEHICLE OWNED]. I believe the primary [BRAND OF VEHICLE OWNED] dealership I use will still be in business 3 – 5 years from now."

Base: Owns a vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
AGREE	62	54	73
Strongly Agree	34	27	44
Somewhat Agree	28	27	29
Neither Agree Nor Disagree	28	33	22
Somewhat Disagree	5	6	3
Strongly Disagree	6	7	4

Note: Percentages may not add up to 100% due to rounding

**TABLE 9**

**FUTURE PURCHASE INTENTION – SAME VERSUS DIFFERENT BRAND**

"If you were to purchase or lease a new vehicle today, what manufacturer would you be most likely to purchase/lease? If you are not sure, please provide your best guess."

Base: Intends to purchase or lease new (not used) vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
Will Purchase the Same Brand	57	54	61
Will Purchase a Different Brand	43	46	39

Note: Percentages may not add up to 100% due to rounding and "Other" responses

**TABLE 10**

**FUTURE PURCHASE INTENTION – IMPORT VERSUS DOMESTIC**

"If you were to purchase or lease a new vehicle today, what manufacturer would you be most likely to purchase/lease? If you are not sure, please provide your best guess."

Base: Intends to purchase or lease new (not used) vehicle

	Total	Domestic Owners	Import Owners
	%	%	%
Will Purchase an Import Brand	53	20	85
Will Purchase a Domestic Brand	46	78	14

Note: Percentages may not add up to 100% due to rounding and "Other" responses

**Methodology**

This Harris Poll was conducted online within the United States April 13 and 21, 2009 among 2,401 adults (aged 18 and over). Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents' propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Interactive avoids the words “margin of error” as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in Harris Interactive surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in the Harris Interactive panel, no estimates of theoretical sampling error can be calculated.

***These statements conform to the principles of disclosure of the National Council on Public Polls.***

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***The Harris Poll*<sup>®</sup> #52, May 26, 2009**

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**About Harris Interactive’s Automotive and Transportation Research Group**

Harris Interactive’s Business & Industrial sector provides thought leadership, strategic research and consulting for the global automotive industry. Our automotive experts have over 50 years of global experience in understanding the needs and challenges of clients across the full spectrum of the industry, including vehicle manufacturers, automotive suppliers, automotive retail and service. For more information on our portfolio of research products and solutions, please visit [www.harrisinteractive.com/ATR](http://www.harrisinteractive.com/ATR).

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