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Press Release

J.D. Power and *AUTO TEST* Report: Compensating for Flat Vehicle Sales, Germany's Automakers, Dealers Need to Focus on Loyalty, Purchase Factors and Improving Service Business

[Volvo Ranks Highest in Vehicle Owner Satisfaction in Germany:](#)
[Toyota Garners Three Model Awards in Their Respective Segments](#)

MUNICH: 27 June 2013 — With new-vehicle sales expected to remain sluggish in Germany during the coming years, loyalty and a heightened awareness of the factors that influence the purchase decision, as well as attention to building service relationships, become more vital to automakers and dealers, according to the J.D. Power 2013 Germany Vehicle Ownership Satisfaction StudySM (VOSS) released today in association with *AUTO TEST*.

The 2013 Germany VOSS examines owner satisfaction with one- to three-year-old vehicles, based on evaluations of four key measures that comprise the overall ownership experience (in order of importance): vehicle appeal (27%), which includes performance, design, comfort and features; ownership costs (25%), which includes fuel consumption, insurance and costs of service/repair; vehicle quality and reliability (24%); and service satisfaction (23%).

Volvo ranks highest in vehicle ownership satisfaction among the 25 vehicle brands included in the study. Volvo manages to inspire enthusiasm among its loyal owners even in lackluster times, especially since the brand delivers on many of the purchase considerations that are most important to premium vehicle buyers in the German market, as supported in the study.

Volvo ranks highest in 2013 with a score of 832. Volvo performs particularly well in vehicle quality and reliability and vehicle appeal. Toyota (816) follows Volvo in the rankings and performs particularly well in vehicle ownership costs and vehicle service. Rounding out the highest-ranked brands are Mercedes-Benz (810), Mazda (808) and Mitsubishi (807).

KEY FINDINGS

- Overall satisfaction among vehicle owners in Germany averages 789.
- Vehicle appeal (27%) and ownership costs (25%) are the two highest key drivers of overall satisfaction.
- After a one-year break, Volvo returns to rank highest in vehicle ownership satisfaction.
- The Toyota Prius (854), Honda CR-V (852) and Volvo V70/XC70 (849) achieve the highest scores in the study.

The study finds that the five highest-ranked automotive brands benefit from higher loyalty and recommendation rates. Some 44 percent of vehicle owners of these brands say they “definitely will” purchase the same brand again, while just 30 percent of owners of brands with below-study average satisfaction scores say they “definitely will” repurchase.

Similarly, 52 percent of owners of vehicles from among the five highest-ranked brands say they “definitely will” recommend their brand, while only 39 percent of owners of brands with below-industry average scores say they “definitely will” recommend. High satisfaction also impacts referrals. While 45 percent of owners of vehicles from brands with high satisfaction scores say they “definitely will” recommend their service dealer, only 36 percent of owners of vehicles from brands with satisfaction scores below the study average say the same.

“Owners of premium brands are more concerned about abstract concepts of ownership—such as safety, quality of workmanship, image, comfort and styling—compared with volume-brand owners who are more concerned with the practical elements of ownership—such as getting a good deal or buying a new vehicle with low fuel consumption,” said Mark Lendrich, senior research manager at J.D. Power Europe.

The study finds that among volume brands (46%), fuel consumption is the third-most-frequently cited consideration when purchasing a new vehicle, but is the 11th most frequently reported problem for buyers of premium brands (33%).

In 2013, both volume- and premium-brand models achieve high satisfaction scores. Mass-market brand Toyota achieves the highest scores in three of eight award segments. The Aygo ranks highest in the city car segment; the Yaris ranks highest in the small car segment; and the Prius ranks highest in the compact segment and is the highest-scoring model in the study. The Volkswagen Passat CC ranks highest in the mid-size segment.

Other models ranking highest in their respective segments include Honda CR-V (compact SUV); Opel Meriva (small MPV); Seat Altea (MPV); and Volvo V70/XC70 (large/luxury).

Service Business Presents Enhanced Revenue Opportunity for Dealers

In light of a less-than-robust outlook for new-vehicle sales in Germany, automakers and dealers need to look for such other avenues as service and parts sales to boost revenues. The study finds that dealers capture 76 percent of industry-wide service spend on vehicles that are one to three years old, compared to aftermarket/non-dealer facilities, which get 24 percent of service spend. In the past 12 months, 65 percent of service visits for lube/oil changes, scheduled maintenance and repairs were performed by authorized dealers.

Vehicle owners indicate they spend more for basic services—such as oil changes and scheduled maintenance—at authorized dealers than at other service facilities. In contrast, owners indicate they spend less on repairs at dealerships than they do at other service facilities.

“When owners elect to bring their vehicle to an authorized dealership, it is an opportunity for dealerships to maintain and build exclusive relationships with their service customers,” said Lendrich. “This may help them avoid losing service customers and retain owner brand loyalty.”

The Internet Gains Ground as a Research Tool among Germany’s New-Vehicle Shoppers

Currently, more than 80 percent of Germany’s population is connected to the Internet, according to German government estimates from J.D. Power research. As a result, understanding how customers use the Internet when shopping for a new vehicle is imperative to gaining sales leads and bolstering brand awareness for automakers and dealers. The 2013 Germany VOSS results indicate that 70 percent of vehicle owners used the Web to shop for a new vehicle in 2013. Premium-brand owners (73%) use the Internet slightly more often than volume-brand owners (69%).

Nearly one-fifth (18%) of premium-brand owners say that they used an app (software application or program downloaded on a mobile device, such as a smartphone). New-vehicle owners indicate that they used a smartphone (22%) or tablet (14%) to research new vehicles.

The 2013 Germany Vehicle Ownership Satisfaction Study is based on 17,937 online evaluations by vehicle owners in Germany whose vehicles were originally registered new between January 2010 and December 2011. The survey was fielded in Germany in January through March 2013.

This annual J.D. Power study provides consumers with information to help them make purchase decisions about vehicle models sold in the Germany market, and helps manufacturers to understand what drives high levels of satisfaction among their customers. Additional study results are published exclusively in the July issue of *AUTO TEST*, which will be on sale beginning on June 28, 2013.

About J.D. Power

J.D. Power is a global marketing information services company providing performance improvement, social media and customer satisfaction insights and solutions. The company's quality and satisfaction measurements are based on responses from millions of consumers annually. Headquartered in Westlake Village, Calif., J.D. Power has offices in North America, Europe and Asia Pacific. For more information on [car reviews and ratings](#), [car insurance](#), [health insurance](#), [cell phone ratings](#), and more, please visit JDPower.com. J.D. Power is a business unit of McGraw Hill Financial.

About McGraw Hill Financial

McGraw Hill Financial (NYSE: MHFI), a financial intelligence company, is a leader in credit ratings, benchmarks and analytics for the global capital and commodity markets. Iconic brands include Standard & Poor's Ratings Services, S&P Capital IQ, S&P Dow Jones Indices, Platts, CRISIL, J.D. Power, McGraw-Hill Construction and Aviation Week. The Company has approximately 17,000 employees in 27 countries. Additional information is available at <http://www.mhfi.com>.

About *AUTO TEST*

AUTO TEST is a member of the international *AUTO BILD* group published by Axel Springer. Since 2003, *AUTO TEST* has been the leading special interest magazine for readers who are planning to buy a new car. More than 500 cars are tested each year, with more than 1.8 million kilometers driven to provide readers with detailed and objective model reviews to help them choose the best car for their money. Readers can also find tips on cutting running costs, used cars, service, finance and accessories.

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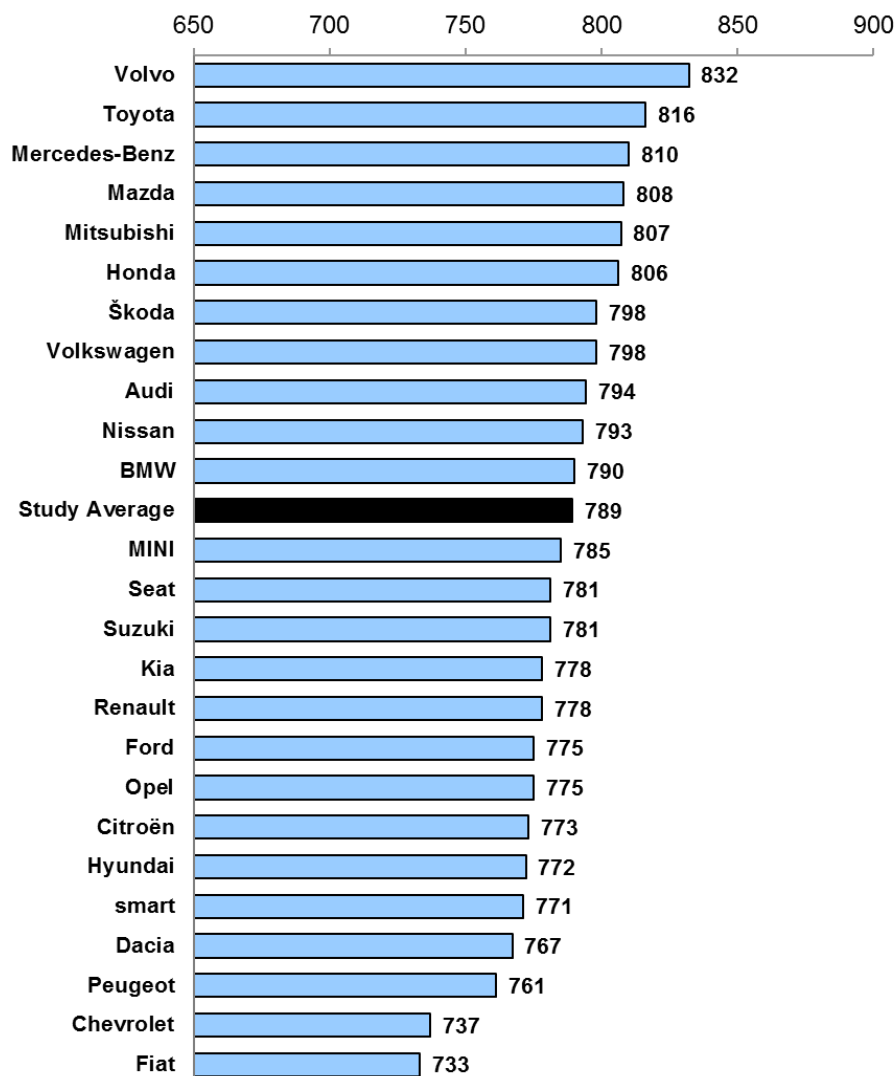
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NOTE: Four charts follow.

J.D. Power 2013 Germany Vehicle Ownership Satisfaction StudySM (VOSS)

VOSS Manufacturer Index Ranking

(Based on a 1,000-point scale)



NOTE: Some small-volume models not included in make averages.
Included in the study, but not ranked due to small sample size are Alfa Romeo and Porsche.

Source: J.D. Power 2013 Germany Vehicle Ownership Satisfaction StudySM (VOSS)

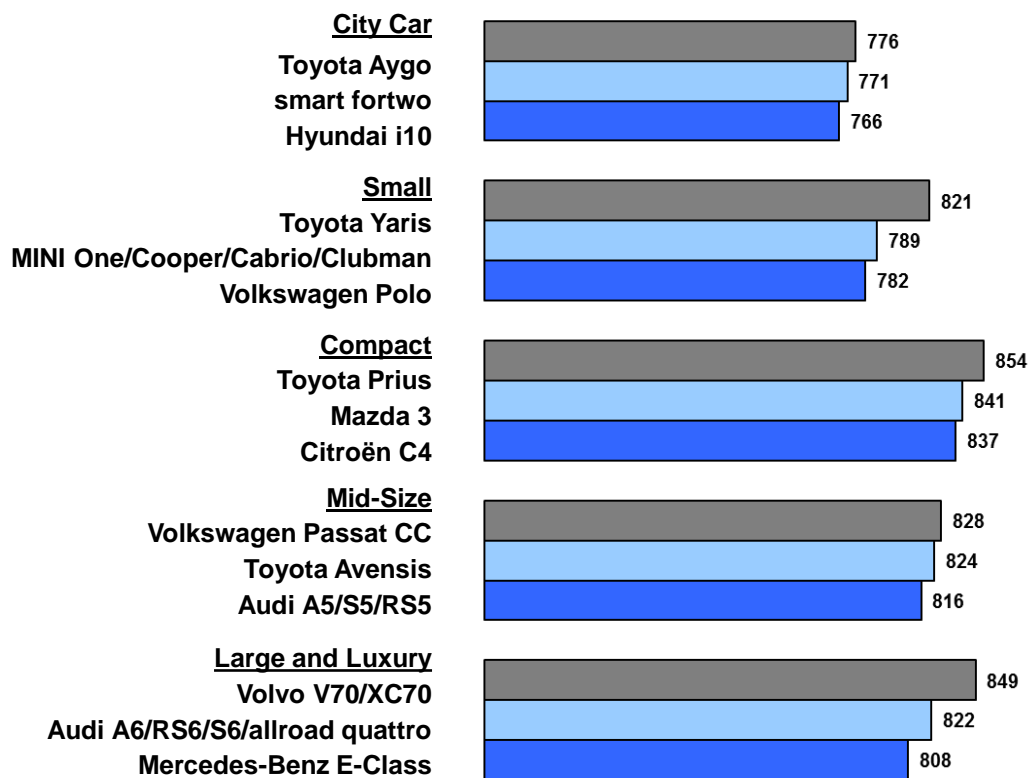
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2013 Germany Vehicle Ownership Satisfaction StudySM (VOSS)

Top Three Models per Segment Overall VOSS

(based on 1,000 point scale)



NOTE: For a segment award to be presented, there must be at least four models with sufficient sample that comprise 67 percent of market sales within an award segment. No Sporty or Large SUV awards has been presented due to insufficient market representation among rankable models in the segment.

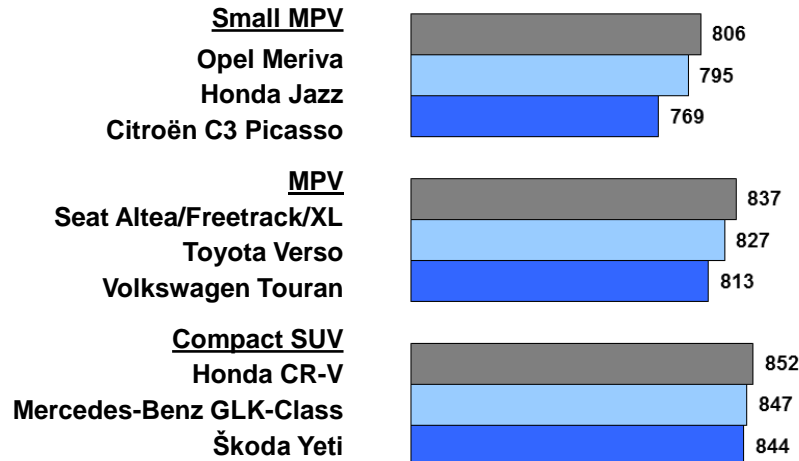
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2013 Germany Vehicle Ownership Satisfaction StudySM (VOSS)

Top Three Models per Segment Overall VOSS (based on 1,000 point scale)



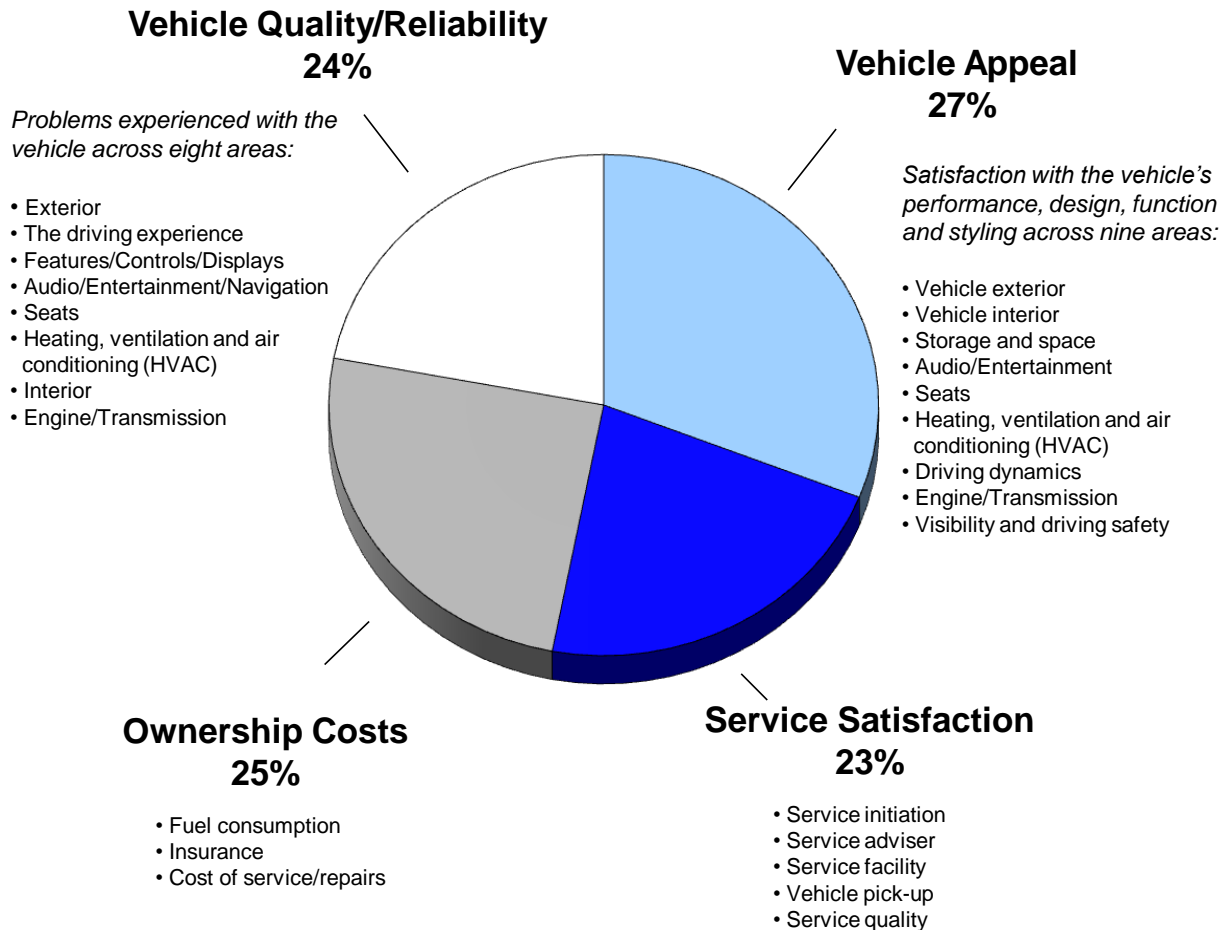
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J.D. Power 2013 Germany Vehicle Ownership Satisfaction StudySM (VOSS)

Measures Contributing to Overall Vehicle Ownership Satisfaction



Source: J.D. Power 2013 Germany Vehicle Ownership Satisfaction StudySM (VOSS)

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