



## The 4 Key Drivers of Car Shopper Satisfaction

How Transparency, Control, Education, and Support Win Deals



# Study Methodology



## Objective

Understand consumer needs and pain points within the dealership experience and identify how these are being addressed by thriving dealers.

## Methodology

1,090 vehicle buyers

- 740 New Buyers
- 350 Used Buyers

Purchased in past 12 months from a franchise dealership

Fielded January 3-22, 2025

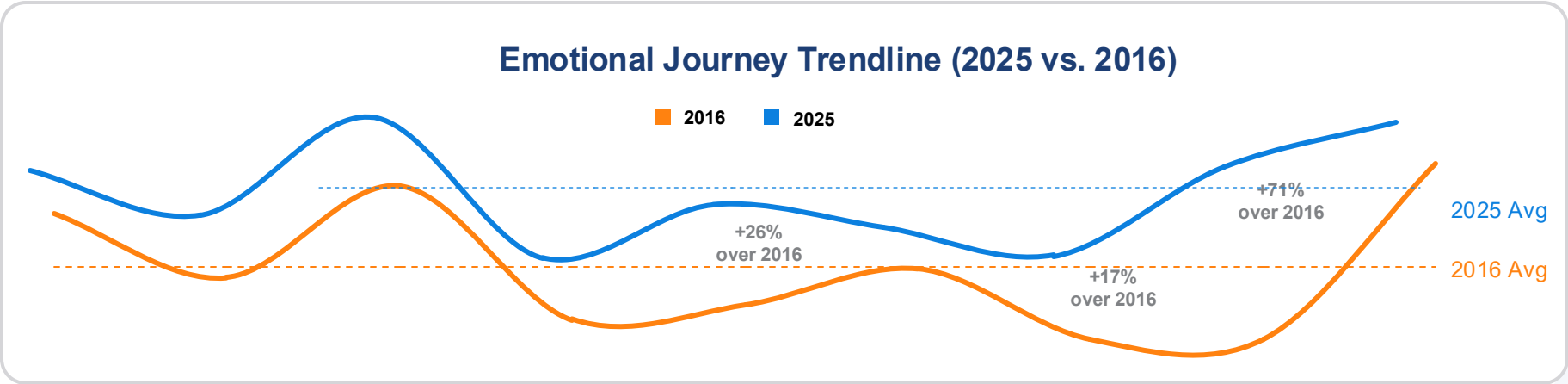
256 Franchise Dealers

- 61 Management roles
- 195 Marketing/sales roles

Fielded January 21 -30, 2025

# Growing positivity throughout the journey in the last decade

Some dips remain, particularly during the trade-in appraisal and when evaluating F&I products

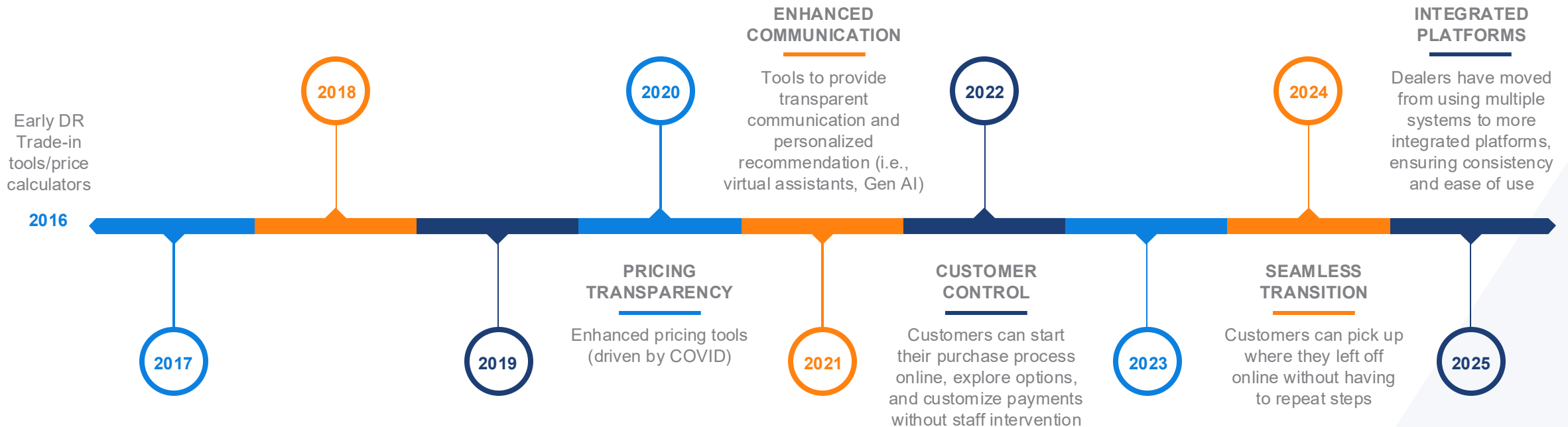


Engage with Staff*	Comparing Vehicle & Payments	Test Drive	Trade-In Appraisal	Negotiate Deal Terms	Apply for and Finalize Vehicle Finance*	Evaluate & Purchase F&I Products	Review and Sign**	Acquire the Vehicle*
Satisfied	In control	Excited	Satisfied	Satisfied	Hopeful	Satisfied	Satisfied	Excited
Confident	Confident	Satisfied	Hopeful	Confident	Confident	Confident	Excited	Satisfied
Hopeful	Hopeful	Confident	Disappointed	In control	Satisfied	In control	Confident	Confident
In control	Satisfied	In control	Confident	Excited	Excited	Overwhelmed	In control	In control
Excited	Excited	Hopeful	Excited	Hopeful	Worried	Empowered	Empowered	Empowered
Overwhelmed			Overwhelmed			Confused		

\*Significant wording change for step from 2016 | \*\*New step added in 2025 | 2025 Top Emotions among those who did the step | Sources: 2025 Key Drivers of Car Shopper Satisfaction

# Last decade defined by the introduction and evolution of digital retailing technology

## Changes Seen Over Time (2025 vs. 2016)

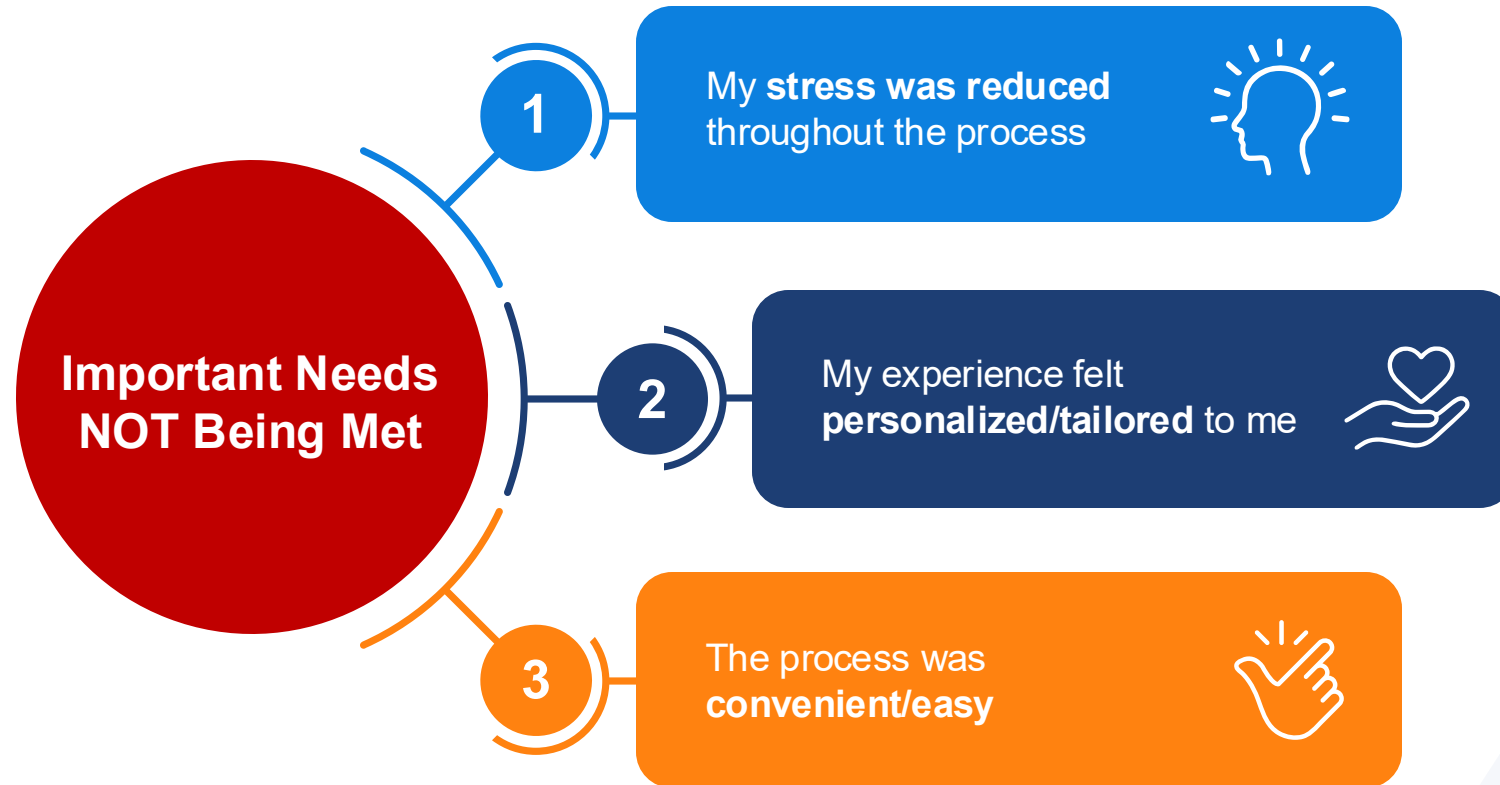


# These 4 drivers of satisfaction create trust, reduce friction, and give buyers confidence



# Convenience, personalization, and stress reduction are continued opportunities

## Experienced During Purchase



# Idle time is top friction point, but friction felt when finalizing the deal can result in a higher likelihood to abandon the purchase

## Top 5 Most Unpleasant Points in the Journey

*(Among Those Who Completed Each Step)*

1. Waiting/idle time at the dealership
2. Select/purchase F&I products
3. Get a trade-in offer /  
Apply for and finalize financing (tie)
4. Negotiate/finalize the deal terms
5. Determine what you can afford

**24%**

Considered dropping out during purchase journey

## Points in the Journey When Buyers Most Consider Abandoning Purchase

*(Among Those Who Consider Abandoning)*

1. Negotiations (44%)
2. Trade-in offer (23%)
3. Determine affordability (22%)
4. Apply for financing (21%)
5. Compare vehicles & payments (20%)



# Dealers with higher customer satisfaction are significantly more likely to offer tools that provide personalization and control.



## Dealers with improved customer satisfaction are more likely to offer (vs. same/decline)...

(89% vs. 67%)

Personalized deal terms/financing recommendations

(84% vs. 71%)

Clear understanding of finance terms, fees, and other deal components

(78% vs. 63%)

Personalized recommendations for F&I products that fit their needs and budget

(74% vs. 58%)

Ability to submit a deal through your dealership website or third-party listings sites

(70% vs. 57%)

Ability to pick up in-store where they left off online without having to repeat steps



# These offerings also contribute to significant gains across the dealership

Changes in the Past 12 Months Among Dealers With Improved Customer Satisfaction (vs. same/decline)

