



RESEARCH STUDY

The Road to Winning Drivers

What Drivers Want in Automotive Aftermarket Service

July 2013

Key takeaways

Drivers are Yours to Win

There is no clear differentiation between service chains in drivers' minds. Even committed drivers can be swayed.

Stand out in digital

Drivers do their research online before making a choice about service providers. Be where they are, using good information and even video to establish trust.

Connect across mobile devices

In an industry with no clear winners, it's critical to be there when drivers are stranded or researching service recommendations.

What we wanted to know

How does digital influence drivers in their automotive maintenance decisions?

What we did



Qualitative

Sterling Brands used Google+ to conduct socially enabled qualitative research in the form of online focus groups.

The study was conducted over four key events, which leveraged G+ capabilities:

- user-generated videos
- written posts
- uploaded images
- a series of Hangouts

Quantitative

Google Consumer Surveys used one- and two-question polls to gain further insight into service and maintenance consumer preferences.

Surveys ranged from 500 to 2,000 respondents, ages 18-44, and were fielded in May and June 2013.

The driver is yours to win.

Quality and trust trump price.

Offers and deals are important to drivers for vehicle service, but even more important is great customer service they can rely on.

81% of drivers agree that quality service is more important than price

Google+ Sterling Driver Insights Study,
Google Consumer Surveys 'With vehicle service, quality of service and a great customer
experience are more important than a low price or a good deal.' June 2013, A18-44, n=602

There is little differentiation among service brands.

THE OPPORTUNITY

Drivers tend to stay with one shop due to lack of differentiation among service providers rather than high satisfaction.

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They are all basically the same. No one stands out as being good or bad.

“

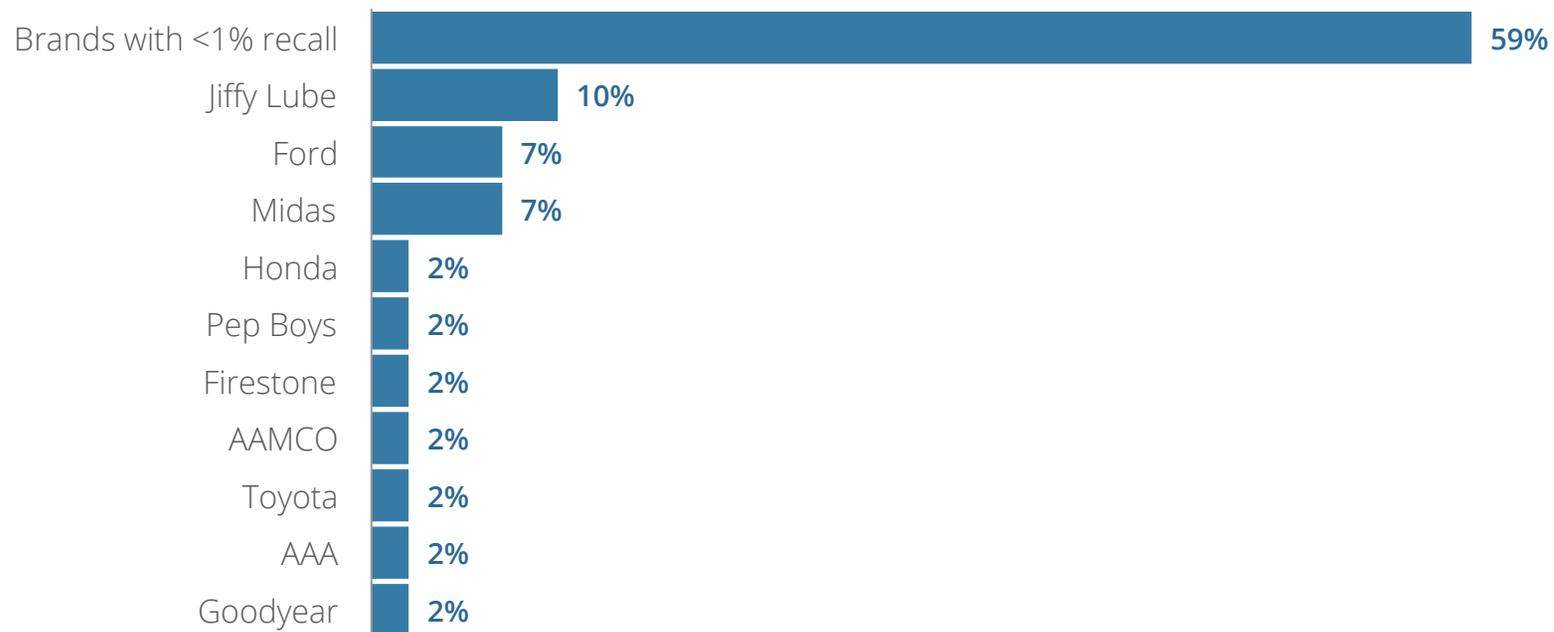
I go to the place across the street, I don't even remember what they're called.

Google+ Sterling Driver Insights Study, Google Consumer Surveys, 'What service chain comes to mind when you think of vehicle service?', open ended responses, June 2013 n=830

There is little differentiation among service brands.

THE OPPORTUNITY

What service chain comes to mind when you think of vehicle service?



Google+ Sterling Driver Insights Study, Google Consumer Surveys, 'What service chain comes to mind when you think of vehicle service?', open ended responses, June 2013 n=830

Committed drivers can still be won.

1 in 3 drivers are uncommitted to a particular auto service provider, and even the committed drivers can be converted:

“

If my regular mechanic is busy, I'll just go to a Jiffy Lube or Lukoil - whichever has less wait time.

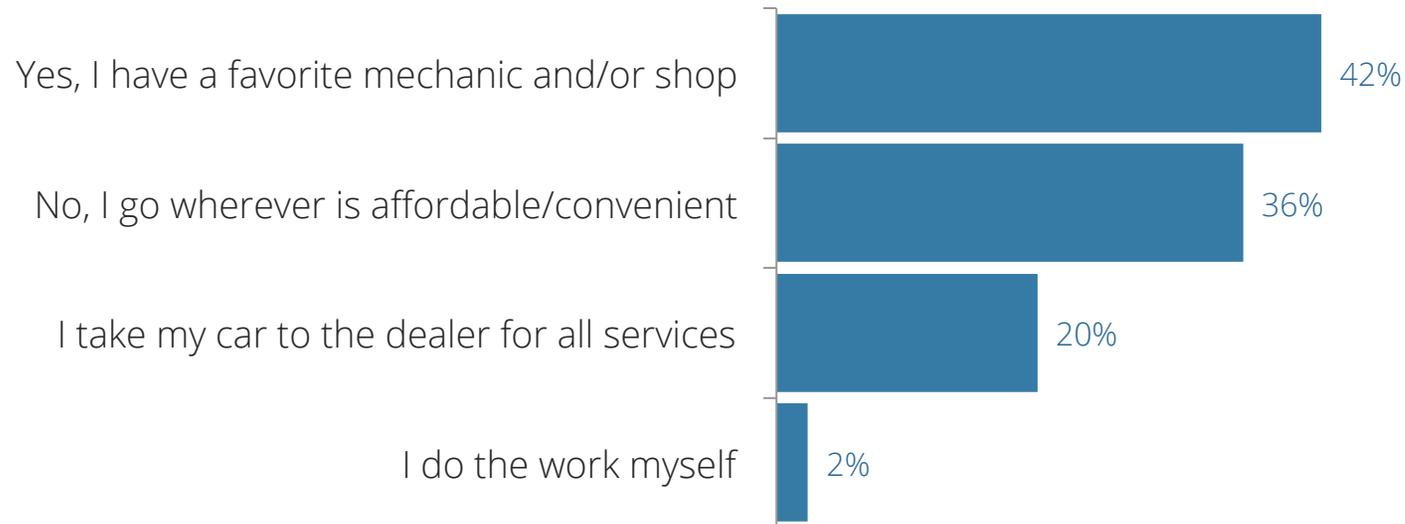
“

For big jobs, I trust my family mechanic. For routine stuff it doesn't really matter.

Google+ Sterling Driver Insights Study,
Google Consumer Surveys, 'What service chain comes to mind when you think of vehicle service?', open ended responses, June 2013 n=830

Committed drivers can still be won.

Do you currently have a favored mechanic and/or service shop to perform routine vehicle maintenance?



Google+ Sterling Driver Insights Study, Google Consumer Surveys, 'What service chain comes to mind when you think of vehicle service?', open ended responses, June 2013 n=830

Drivers are looking for you online.

70,000,000 Monthly aftermarket service searches on Google

This opportunity represents

525K customers
a month

Their referrals make up another

100K customers

Drivers are looking online for help.

262,000 *“How to Change your Oil Filter”* videos

106,000 *“How to Change your Brake Fluid”* videos

12,900 *“How to Fix your Fuel Pump”* videos

These 3 topics alone represent

1 Year of video content

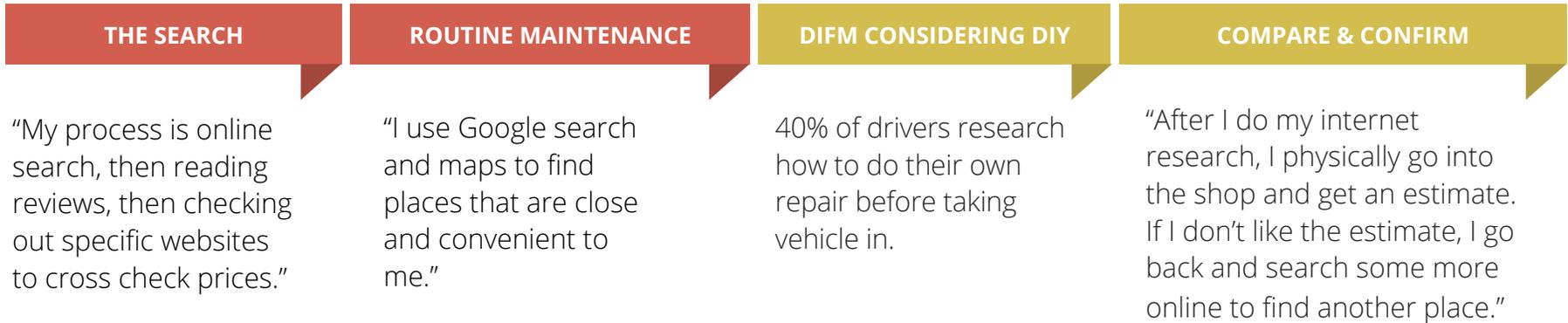
Create or align your brand with relevant content to *educate through video.*



Google Internal Data 2013

Digital moments matter throughout
a driver's journey.

Moments to win the undecided driver



The road is filled with moments to win over a driver in digital.

"If my regular mechanic is too busy, I'll just look for a chain service shop for basic stuff."

"I was on the side of the road and my regular mechanic was too far away - so I used my phone to search for a reputable place nearby."

"I share my opinions online all the time, especially when I feel that the service is exceptionally great, or bad."

THE REGULAR

THE STRANDED DRIVER

THE ADVOCATE

Moments to win the decided driver

Drivers start with a search.

In an industry with no clear winners, it's critical to connect with drivers whenever and wherever they are searching for their next service.

43% of drivers perform a search online or on their phone when deciding where to take their vehicle for service

Google+ Sterling Driver Insights Study.
Google Consumer Surveys "What online research did you perform prior to deciding where to take your vehicle for service?" Adults 18-44. n=239 June 2013

Drivers start with a search.



I use Google Search and Maps to find places that are close and convenient to me - then I read the ones that pop-up first and check their reviews.

DIGITAL RESEARCH CONDUCTED PRIOR TO DECIDING WHERE TO TAKE VEHICLE FOR SERVICE



Google+ Sterling Driver Insights Study.
Google Consumer Surveys "What online research did you perform prior to deciding where to take your vehicle for service?" Consumers that researched prior to deciding. Adults 18-44. n=239 June 2013

Routine maintenance is an introduction.

Busy drivers turn to convenient solutions for everyday car problems. Take advantage of the opportunity to build trust for repeat business.



I get the routine stuff done wherever's convenient on my way to or from work. For bigger stuff I go to my family's mechanic.



If my regular mechanic is too busy, I'll just look for a chain service shop for basic stuff.



The oil change is the first date.

Routine maintenance is an introduction.

73% would return to a service center they visited for preventative maintenance for future large repairs

Google+ Sterling Driver Insights Study. Google Consumer Surveys, 'Would you consider going back to the same service center for larger repairs?', amongst respondents who had taken their vehicle in for preventative maintenance in the last 12 months, June 2013, n=663, Aftermarket Partner Quote

DIFMers still research like DIYers.

Drivers research their repairs before bringing in their vehicles. Leverage the power of video to educate and build trust.



I watch YouTube tutorials and learn how to fix small things myself. It would be great to have more of those.



I want YouTube tutorials, but a lot of them currently are poorly shot - they should create a figure, an authority, who really knows his stuff and film more close-ups.

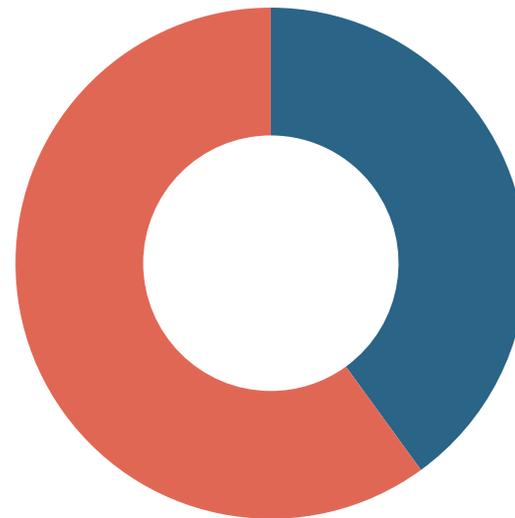
Google+ Sterling Driver Insights Study.
Google Consumer Surveys "Did you research how to do the repair yourself before taking your vehicle in?"
Adults 18-44. n=635 June 2013

DIFMers still research like DIYers.

40%

of drivers research how to do their own repair before taking vehicle in

60%
did not research how to do repair



40%
researched how to do repair before taking vehicle in

Google+ Sterling Driver Insights Study.
Google Consumer Surveys "Did you research how to do the repair yourself before taking your vehicle in?"
Adults 18-44. n=635 June 2013

Savvy drivers do their homework.

Even after shop visits, drivers continue online research for price comparison and confirmation of technician advice.



My process is online search, then reading reviews, then checking out specific websites to cross-check prices.



I take the mechanic's advice and then I go home and research the parts and labor online. Then I go back in with more knowledge.



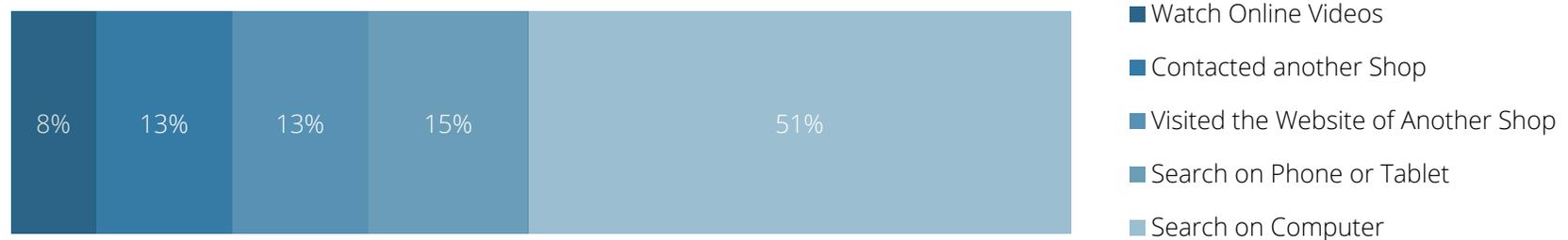
After I do my internet research, I physically go into the shop and get an estimate. If I don't like the estimate, I go back and search some more online to find another place.

Google+ Sterling Driver Insights Study.
Google Consumer Surveys "Did you do any of the following to research the parts, price, or labor recommended?" Adults 18-44. n=638 June 2013

Savvy drivers do their homework.

62% of drivers research the service technician's recommendation

METHOD OF RESEARCHING TECHNICIAN'S RECOMMENDATIONS



Google+ Sterling Driver Insights Study.
Google Consumer Surveys "Did you do any of the following to research the parts, price, or labor recommended?" Adults 18-44. n=638 June 2013

Show off your knowledge with video.



I'd like it if they spent a bit more time explaining things to me. I know they are busy, but it would make me trust them more.



You can look up videos on YT, but the videos are not good enough, not detailed enough. There is no ONE provider of informative readings and video about cars- There should be one.



I would recommend that they prove themselves to me by providing YouTube videos about why they are the best man or service provider for the job. I have to admit that sharing discounts and promotions are pretty huge to me but knowing that the job will be done right is even bigger!

Google+ Sterling Driver Insights Study.

Bring drivers back by making their lives easier.

THE REGULAR



Since our world is becoming more and more digital... Enough with sending me something in the mail that I'm just going to throw away (thanks for the reminder, but what a waste of paper).



I would like reminders for service. I have a lot going on with my kids, so sometimes I forget to do basic things like an oil change.



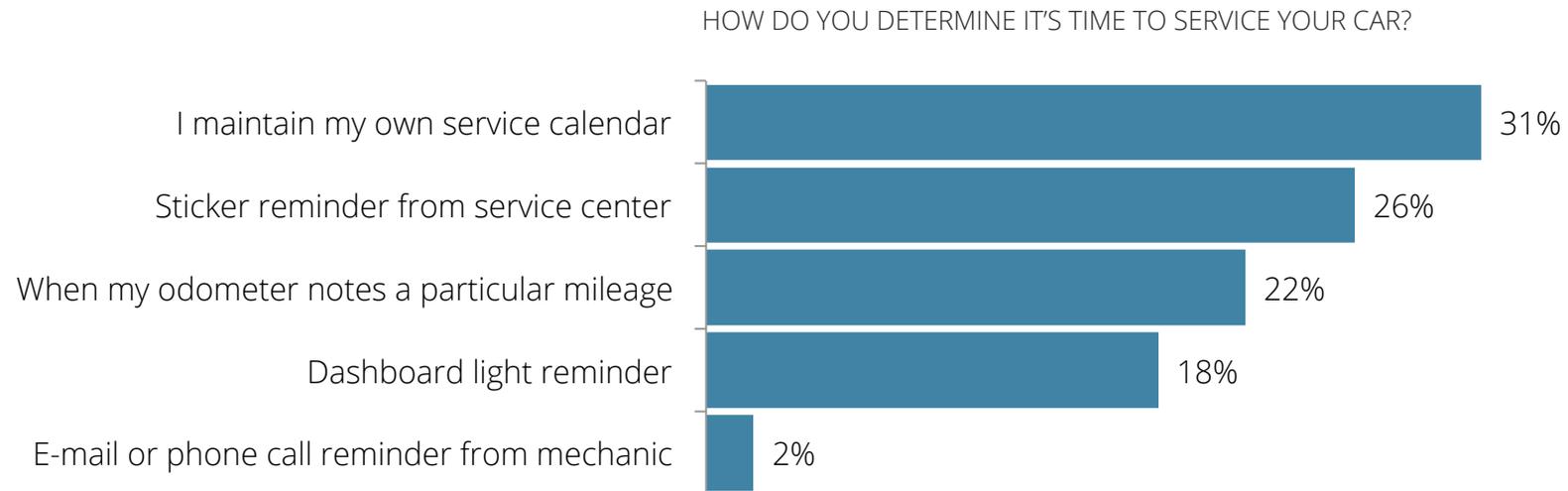
It would be great to have a way to track my service myself - and be able to access it from anywhere.

Google+ Sterling Driver Insights Study, Google Consumer Surveys 'How do you determine it's time to service your car?' June 2013, A18-44, n=1315

Bring drivers back by making their lives easier.



Only 2% of vehicle owners get digital reminders from their service provider



Google+ Sterling Driver Insights Study, Google Consumer Surveys 'How do you determine it's time to service your car?' June 2013, A18-44, n=1315

Connect across mobile devices.

Stranded drivers can be gained for life if they can find you at the moment they need you the most.



I was on the side of the road and my regular mechanic was too far away - so I used my phone to search for a reputable place nearby - it was a good experience, I'll probably go back to the new place.

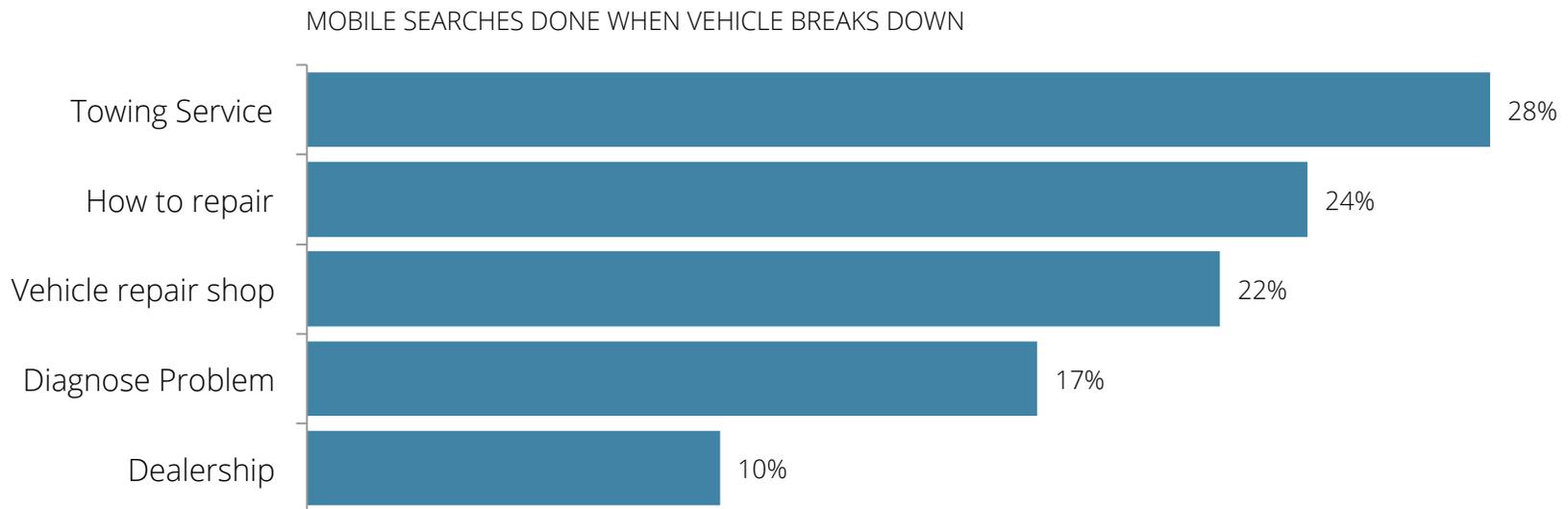


We always have our phones with us - phones and cars should be more connected.

Google+ Sterling Driver Insights Study. Google Consumer Surveys "searches on mobile phone when vehicle breaks down" Adults 18-44. n=342 June 2013

Connect across mobile devices.

Stranded drivers can be gained for life if they can find you at the moment they need you the most.



Google+ Sterling Driver Insights Study. Google Consumer Surveys "searches on mobile phone when vehicle breaks down" Adults 18-44. n=342 June 2013

Consider the full value of a happy customer.

THE ADVOCATE

1 in 4

drivers will post a review when they find a service provider they like

“

I share my opinions online all the time especially when I feel that the service is exceptionally great, or bad.

“

If you go that extra mile...not only am I going to come back, but I'll tell my peers as well.

Google+ Sterling Driver Insights Study, Google Consumer Surveys 'How likely are you to return to the service provider that most recently completed routine repairs or service on your vehicle??' February 2013, A18-44, n=578 & 'How likely are you to post a review after a positive or negative experience after getting your vehicle serviced?' June 2013 n=667

Key takeaways

Drivers are Yours to Win

There is no clear differentiation between service chains in drivers' minds. Even committed drivers can be swayed.

Stand out in digital

Drivers do their research online before making a choice about service providers. Be where they are, using good information and even video to establish trust.

Connect across mobile devices

In an industry with no clear winners, it's critical to be there when drivers are stranded or researching service recommendations.

Thank you.

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