In order for your opinions to be included in the survey results, you must complete your survey online. Go to <u>www.nadasurvey.com</u>; then click Take Survey. You will need to have you unique User ID available to access the survey.

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NADA encourages the Dealer Principle or General Manager to involve his/her department managers- sales, service, parts, etc. – in the completion of the semiannual Dealer Attitude Survey. To facilitate this input, we have created this Survey Aid as a tool to help obtain the opinion of your staff before completing the survey online.

The Survey Aid mirrors the online survey. You can record your answers on paper and have a member of your staff enter them online.

Overall Attitude

The Overall Attitude questions are the cornerstone of the Dealer Attitude Survey. Since the inception of the survey in 1985, these questions have remained essentially the same and measure changes over time. Often, referred to as the Trend Questions, they ask about the franchise value, policies, and people.

Detailed Issues and Attitudes

The Detailed Issues and Attitudes questions capture the underlying issues that influence the value, policies, procedures, and people of your franchise operations. Although many of the questions are the same over time, they do change periodically as new issues arise in the industry.

Confidential User ID: _	(7 digits)
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General Instructions

Please answer **Franchise**, **ZIP Code**, **and the Value**, **Policy and People Sections** for each new vehicle franchise you sell at this dealership. The remaining questions only need to be answered once, for your entire dealership.

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Franchis	e (Select the	franchise you w	ant to evaluate from the	list below.)					
O Acur O Audi O BMV O Buic O Cadi O Chev O Chry O Dodg	V k-GMC illac vrolet vsler	O Fiat O Ford O Honda O Hyundai O Infiniti O Jaguar O Jeep O Kia	O Land Rover O Lexus O Lincoln O Mazda O Mercedes-Benz O MINI O Mitsubishi O Nissan	O Porsche O RAM O Subaru O Sprinter O Toyota O Volkswagen O Volvo					
Enter the Zi	p Code for the	physical location	of this franchise:	(5 digits))				
How many n	ew vehicles die	d you retail last ye	ear for only this franchise?	,,,					
Overall, how		u with your franchis	e?		O Very Satisfied	O Satisfied	O Neutral	O Dissatisfied	O Very Dissatisfied
Discuss the s		w about your franch	ise's Value and decide whet g ree , with each.	her you strongly agree,	Strongly Agree	Agree	Neutral) Disagree	O Strongly Disagree
agree, are neutral, disagree, or strongly disagree, with each. 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. Rate the value of your franchise on a scale of 1 to 10, where 1 is low and 10 is high					0000	0000		Ο	0 0
Value – D	Detailed Iss	ues and Attit	tudes						
whether you a with each. Evaluate you • F • C	are very satisfi r franchisor's cu Product reliability Dverall product r	ed, satisfied, neuti irrent product in th	ility "long-term"		OOO Very Satisfied	OOO Satisfied		OOO Dissatisfied	OOO Very Dissatisfied
			2	Convright 2018 National	Automo		aalara	Accoci	

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	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
 Evaluate your franchisor in the area of vehicle distribution: Allocation system Product availability Fairness 	0 0 0		0 0 0	Õ	0 0 0
 Evaluate your franchisor's marketing efforts: National advertising – new vehicle National advertising – certified pre-owned Digital (Includes OEM's brand websites & online leads) OEM sponsored dealer website platform Social media 	0000	00000	0000	00000	00000
Policy – Overall Attitude Discuss the statements below about your franchisor's policies and decide whether you strongly agree, agree, are neutral, disagree, or strongly disagree with each.		Agree	Neutral	Disagree	Strongly Disagree
 My franchisor considers dealer input before making decisions that affect dealers. My franchisor's policies support my efforts to achieve customer satisfaction. My franchisor's policies and procedures are fair. My franchisor's customer satisfaction system of rating my dealership is fair. 	OOOO Strongly Agree	₹ 0 0 0 0	v 0 0 0 0		0 0 0 0 St
Policy – Detailed Issues and Attitudes Evaluate your franchisor's responsiveness to dealer input in the following areas: Product Product Product quality Product advertising		O O O Satisfied		Ο	
 Evaluate your franchisor's dealer relations efforts: Franchisor to dealer communications Dealer Council to dealer communications National Council accomplishments Overall satisfaction 	0 0	00000	0	0 0	0 0
Evaluate the ease of doing business with your franchisor:	0	0	0	0	0

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		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfie
 Evaluate your franchisor's customer satisfaction rating system: My franchisor's <u>sales</u> customer satisfaction rating (CSI) system: My franchisor's <u>service</u> customer satisfaction rating (CSI) service 	• •	0 0	0 0	0 0	0 0	0 0
 is fair. My franchisor uses my CSI score fairly. (Example: impact c etc.) 	on bonuses, rewards program,	, O	0	0	0	0
 Evaluate your franchisor's new vehicle sales incentives: Industry competitiveness Fairness to my dealership Fairness to dealership of all sizes Efforts to avoid complexity Considers my product availability Competitiveness of <u>new</u> vehicle <u>leasing</u> plans and program 	S	0	000000	0000	0000	000000
 Evaluate your franchisor's certified used car program: Provides additional profit opportunity for my dealership. Overall value of the program 		0 0	0 0	0 0	0 0	0 0
Do you use your franchisor's captive/manufacturer preferred finance source?		Ye	sО	No	0	
 If yes, evaluate your franchisor's captive/manufacturer preferred fina Competitiveness of <u>new vehicle financing</u> plans and progra Overall satisfaction 		O O Very Satisfied	O O Satisfied	O O Neutral	O O Dissatisfied	O O Very Dissatisfied
 Please select a non-captive lender that you use from the list below to 5th 3rd Bank Ally Financial Bank of America Bank of the West BB&T Bank BMO Harris Bank NA Capital One Auto Finance Chase Auto Finance Exeter Finance Corp. Huntington National Bank 	evaluate. O RBS Citizens O Regional Acceptance O SunTrust Bank O TD Auto Finance O US Bank O USAA Federal Savings Ba O Wells Fargo Dealer Servic O World Omni Financial O My non-captive lender is r on this list	ces				

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In order for your opinions to be included in the survey results, you must complete your survey	ey
online.	

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 20C. If selected, evaluate your non-captive lender on the following: Competitiveness of <u>new vehicle financing</u> plans and programs Overall satisfaction 	O O Very Satisfied	O O Satisfied	O O Neutral	O O Disagree	O O Very Dissatisfie
People – Overall Attitude Discuss the statements below about your franchisor's people and decide whether you strongly agree, agree, are neutral, disagree, or strongly disagree with each.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
• The sales contact of this franchise is helpful.	0	0	0	0	0
 Evaluate your franchisor's sales contact in the areas of: Fulfillment of commitments Decision-making authority Accessibility 	O O O Very Satisfied	O O O Satisfied	O O O Neutral	O O ODissatisfied	O O O Very Dissatisfied

Accessibility

Answer below question only if you strongly agree/agree with "The sales contact of this franchise is helpful". Please select from the attributes below the one which best describes your sales contact. (Select only one.)

- O Helps me sell cars
- O Responsive/Gets me answers quickly
- O Experience
- O Has the proper job training to be effective
- O Works in my best interest

Please select from the attributes below the one that represents the biggest IMPROVEMENT opportunity for your sales contact. (Select only one.)

- O Helps me sell cars
- O Responsive/Gets me answers quickly
- O Experience
- O Has the proper job training to be effective
- O Works in my best interest

Discuss the statements below about your franchisor's people and decide whether you strongly agree, agree, are neutral, disagree, or strongly disagree with each.	Strongly Agree Agree Neutral Disagree Strongly Disagr
• The Fixed Operations (Service & Parts) of this franchise is helpful.	00000

The Fixed Operations (Service 8 •

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People – Detailed Issues and Attitudes

Discuss the following aspects of your franchisor's people (i.e., field staff, Sr. Management, etc.) and decide whether you are very satisfied, satisfied, neutral, dissatisfied, or very dissatisfied with each.		Very Satisfied	Satisfied	ral	Dissatisfied	Very Dissatisfied
Evaluate v	our franchisor's part operations :	Very	Sati	Neutral	Diss	Ver
	Stock order availability	0	0	0	0	0
•	Emergency order availability	õ		õ		
Evaluate y	our franchisor's regional management :					
•	Overall capabilities	0	0	0	0	0
•	Fulfillment of commitments	0	0	0	0	0
•	Visibility in the field	0	0	0	0	0
•	Timeliness of response to dealer inquiries	0	0	0	0	0
Evaluate y	our franchisor's national senior management:	~	~	~	~	~
•	Overall effectiveness	0	0	0		0
•	Overall leadership ability			0		
•	Accessibility	0	0	0	0	0
Evaluate y	our franchisor's sales training efforts:	0	~	~	~	~
•	Cost effectiveness			0		Ő
•	Adds value			0		0
•	Convenience			0		0
•	OEM sponsored training meets my needs	0	0	0	0	0
Evaluate y	our franchisor's fixed operations training efforts:					
•	Cost effectiveness	Ο	0	0	0	Ο
•	Adds value			0		Ο
•	Convenience	0	0	0	0	0
•	OEM sponsored training meets my needs	0	0	0	0	0
. Evaluate	your franchisor's fixed operations contact in the areas of:					
•	Handling of customer complaints	0	0	0	0	С
•	Fulfillment of commitments			0		С
•	Decision-making authority	0	0	0	0	C
•	Accessibility	0	0	0	0	0
Faciliti	es					

Evaluate the reasonableness of your franchisor's approach to **dealership facility requirements**:

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Future

	e statements below about your franchisor's people and decide whether you gree, agree, are neutral, disagree, or strongly disagree with each.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
•	Overall, this franchise has a clear strategy for the future.	0	0	0	Ŭ	0
•	It is clear to me how my dealership fits in this franchisor's overall future strategy.	0	Ο	0	0	Ο
•	I understand my OEM's electric vehicle strategy.	0	Ο	Ο	0	0
•	I agree with my OEM's electric vehicle strategy.	0	Ο	Ο	0	0
•	My dealership is prepared for the future of electric vehicle.	0	Ο	Ο	0	0
•	I am satisfied of my OEM's communication on the electric vehicle strategy.	0	Ο	Ο	0	0
•	There is an interest in electric vehicle from the customer base.	0	0	0	0	0

Please help your 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 OEM. 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: <u>industryrelations@nada.org</u>

Audi, BMW, Buick-GMC, Cadillac, Chevrolet, Chrysler, Dodge, Fiat, Ford, Jeep, Lexus, Lincoln, Mazda, MINI, RAM and Toyota will be asked to complete some additional questions. These questions can only be viewed in the online survey.

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Takata Airbag Recalls

(Please skip this section if your franchise is not affected by the Takata recall.)

You have almost completed the survey! Now we have a few questions regarding the Takata airbag recalls. Your answers to these questions could be crucial to the recall process, and would be greatly appreciated!

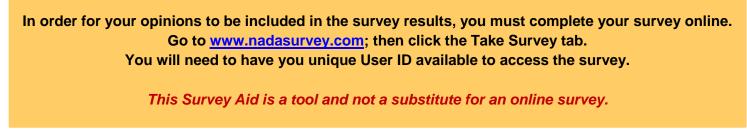
In one or two words, how would you describe your dealership's experience with your OEM when it comes to their engagement regarding the Takata airbag recalls?

What changes could your OEMs make to improve your ability to assist with the Takata airbag recalls repair efforts and owner outreach? Please be as specific as possible.

From your perspective, what services, offers, incentives or other strategies could your OEMs use to accelerate the completion of the Takata airbag recalls? Again, please be as specific as possible.

How important do you think the Takata airbag repair services are compared to the repair services your dealership provides in other recalls? (Please select one.)

- O Much more important
- O Somewhat more important
- O Equally important
- O Somewhat less important
- O Much less important
- O Don't know (volunteer only)



This evaluation was completed by:

General Manager

Both

Optional Overview of NADA's Meeting With Your Franchisor's Senior Management

Upon the survey's completion, NADA meets with your franchisor's senior management to review their franchise-level results. When they become available, NADA plans to email an overview of the meeting to dealers who participated in the survey.

If you do **NOT** want to receive the overview, please indicate this below.

_____I do NOT want to receive the overview of the survey results.

Survey Confirmation

You'll receive confirmation that your survey has been submitted in **two ways**. You can **print your confirmation immediately**, as well as **receive it by e-mail**.

To obtain a confirmation acknowledging the receipt of your completed survey, you must specify your dealership name and e-mail address below.

To protect the integrity of your survey responses, it is recommended that the confirmation be e-mailed directly to your dealership.

Dealership name: _____

E-mail address: _

Please re-type your e-mail address:



Printable Survey Confirmation

If your computer is connected to a printer, you can print your own official survey confirmation from the NADA Chairman, Mark Scarpelli, indicating that your Winter 2018 Dealer Attitude Survey has been submitted to NADA. Just follow the instructions on the next page.



E-mail Survey Confirmation

Everyone who inputs their e-mail address will receive an official confirmation via e-mail from the NADA Chairman, Mark Scarpelli, indicating that their Winter 2018 Dealer Attitude Survey has been submitted and received by NADA (www.nadasurvey.com).

To ensure proper delivery of the confirmation e-mail to you, please add chairman@nadasurvey.com to your safe/trusted sender list and adjust your SPAM filter to approve the sender. If you are not sure how to add this e-mail address or adjust your SPAM filter, please contact your e-mail administrator.

<u>IMPORTANT</u>: If you do not receive a response from us, please check your Junk mail or SPAM e-mail folder first, as it may have been filtered there for your review.