



Press Release

J.D. Power and Associates and *What Car?* Report: Frequency of Service Visits Rises as UK Aftermarket/Independent Service Centres Gain Market Share from Authorised Dealer Service Centres

Jaguar Ranks Highest in Vehicle Owner Satisfaction in the United Kingdom.
Led by the Jaguar XF

LONDON: 30 May 2012 —Despite a decline in annual new-vehicle sales, the average number of times vehicle owners visit authorised dealer service centres or aftermarket/independent service centres has increased to 3.1 this year, compared with 2.4 visits during the past two years, according to the J.D. Power and Associates/*What Car?* 2012 UK Vehicle Ownership Satisfaction StudySM (VOSS) released today.

The study finds that aftermarket/independent service centres have increased their share of average total vehicle service events to 39 percent in 2012, up 6 percentage points from 2011. Authorised dealer service centres' share of average total vehicle service events has decreased to 61 percent in 2012, down from 67 percent in 2011.

“Aftermarket/independent service centres are gaining market share from authorised service centres, as they have ramped up their efforts to expand or improve services and have added facilities,” said Marcus Behrendt, head of European operations for J.D. Power and Associates. “Other improvements possibly contributing to their growth rate are a focus on retail maintenance advertising and creating more customer-centric services, such as extended weekend hours and vehicle collection and delivery services.”

The study also finds that the average annual amount spent on service events has increased to £160 in 2012—a £24 increase compared with 2011—at authorised dealer service centres and £130 (£18 increase) at aftermarket/independent service centres. While this increased spending has resulted in owners being notably less satisfied with the cost of having their vehicle serviced or repaired, compared with prior years, owners who visit only authorised dealer service centres are more satisfied with the cost of their service (7.0 on a 10-point scale) than those who only visit aftermarket/independent service centres (6.6).

Service Satisfaction and Loyalty

Achieving service retention and loyalty is a key factor in improving the likelihood to repurchase the same brand of vehicle next time. The study finds the top five most impactful drivers of service retention are (in order of importance and the current level of occurrence):

1. All of the work completed right the first time (accomplished 93 percent of the time)
2. Immediately able to speak to service adviser (33%)
3. Vehicle ready when originally promised (85%)
4. Service adviser completely focused on you and your needs (81%)
5. The vehicle was returned cleaner than when brought in (59%)

“When these expectations are not met, they negatively impact owners’ service satisfaction, as well as the likelihood to repurchase the same brand of vehicle next time,” said Behrendt. “Currently, the ability to speak directly to a service adviser is the second-most-important driver, but occurs the least often. This is clearly an

area where service centres can enhance vehicle owners' experience and directly impact their level of satisfaction."

The study is based on owner evaluations of their vehicle and dealer across 67 attributes grouped in four measures of satisfaction. In order of importance, they are: vehicle appeal, which includes performance, design, comfort and features; ownership costs, including fuel consumption, insurance and costs of service/repair; vehicle quality and reliability; and dealer service satisfaction.

Overall satisfaction among vehicle owners in the UK averages 770 (on a 1,000-point scale) in 2012. On average, owners express the highest overall satisfaction with quality and reliability (852), while ownership costs has the lowest score (696).

2012 UK VOSS Ranking Highlights

Jaguar (828) ranks highest in vehicle owner satisfaction among manufacturers and performs particularly well in the service satisfaction, vehicle appeal, and vehicle quality and reliability measures. Following Jaguar in the rankings are Lexus and Škoda (each with a score of 801). Rounding out the top five rank positions are Honda (797) and Mercedes-Benz (794).

At the segment level, Jaguar receives one award for the XF model (executive luxury car). The Kia Sportage (compact SUV) achieves the highest score in the study (838).

At the segment level, Toyota and Volkswagen each have four models ranking in the top three in their respective segments, while Mercedes-Benz and Škoda each have three models ranking in the top three.

The 2012 UK Vehicle Ownership Satisfaction Study is based on 17,686 online evaluations by vehicle owners in the UK after an average of two years of ownership. The study was fielded from January to February 2012.

This annual J.D. Power and Associates study provides consumers with reliable and accurate information about many vehicle models, and helps manufacturers provide high levels of satisfaction to their customers. Additional study results are published exclusively in *WHAT CAR?*, which will be on sale Thursday, May 31, 2012.

About J.D. Power and Associates

Headquartered in Westlake Village, Calif., J.D. Power and Associates is a global marketing information services company providing forecasting, 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. For more information on car reviews and ratings, car insurance, health insurance, cell phone ratings, and more, please visit JDPower.com. J.D. Power and Associates is a business unit of The McGraw-Hill Companies.

About The McGraw-Hill Companies

McGraw-Hill announced on September 12, 2011, its intention to separate into two public companies: McGraw-Hill Financial, a leading provider of content and analytics to global financial markets, and McGraw-Hill Education, a leading education company focused on digital learning and education services worldwide. McGraw-Hill Financial's leading brands include Standard & Poor's Ratings Services, S&P Capital IQ, S&P Indices, Platts energy information services and J.D. Power and Associates. With sales of \$6.2 billion in 2011, the Corporation has approximately 23,000 employees across more than 280 offices in 40 countries. Additional information is available at <http://www.mcgraw-hill.com/>.

About What Car?

Over one million consumers consult What Car? every month. The What Car? stable also includes the award-winning website whatcar.com, What Car? New Car Guide, What Car? Price Guide, What Car? TV, What Car?

Mobile and What Car? Video—available online or as a video podcast. What Car? is part of the Haymarket Media Group, the United Kingdom's largest independently owned publishing company with a portfolio of over 150 titles, ranging from specialist consumer magazines to business titles and customer publications, published via wholly owned subsidiaries, joint ventures and under license worldwide. www.whatcar.com

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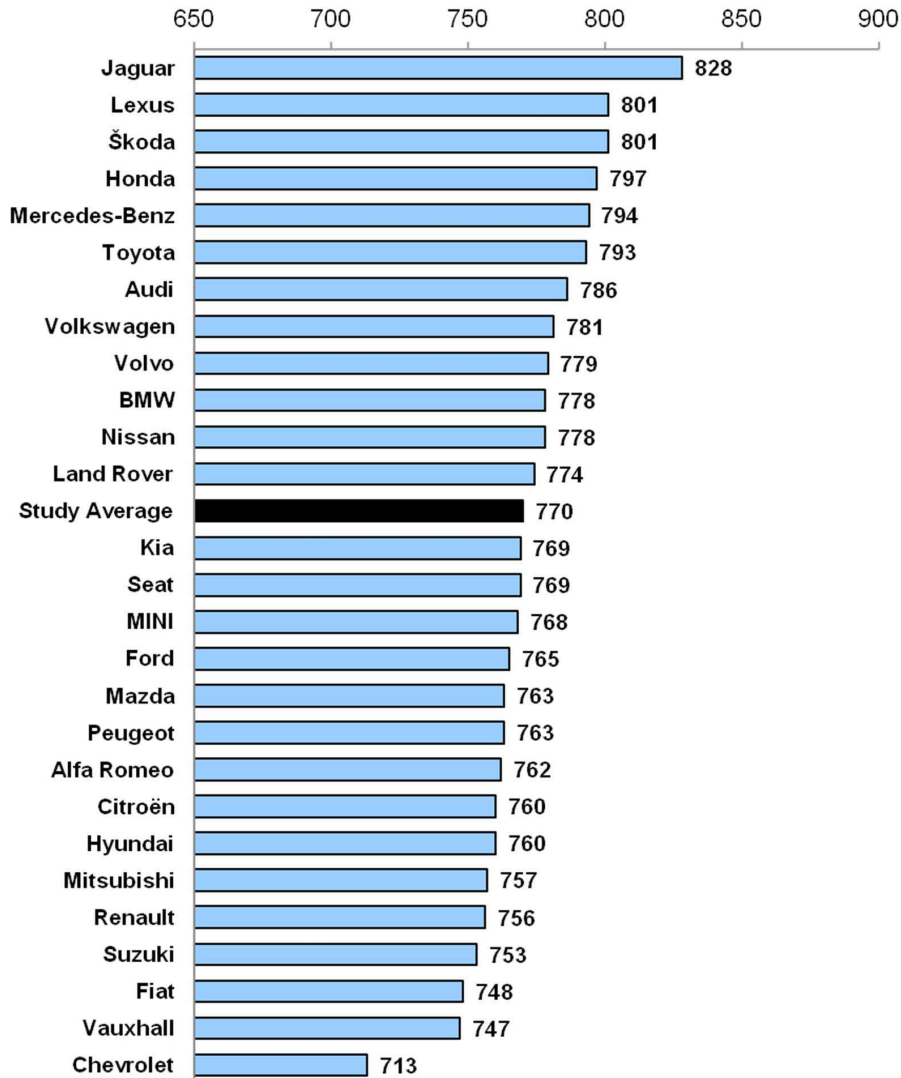
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NOTE: Three charts follow.

J.D. Power and Associates 2012 UK Vehicle Ownership Satisfaction StudySM (VOSS)

VOSS Manufacturer Index Ranking

(Based on a 1,000-point scale)



Included in the study, but not ranked due to small sample size are: Chrysler, Jeep, Porsche, SAAB, smart and Subaru.

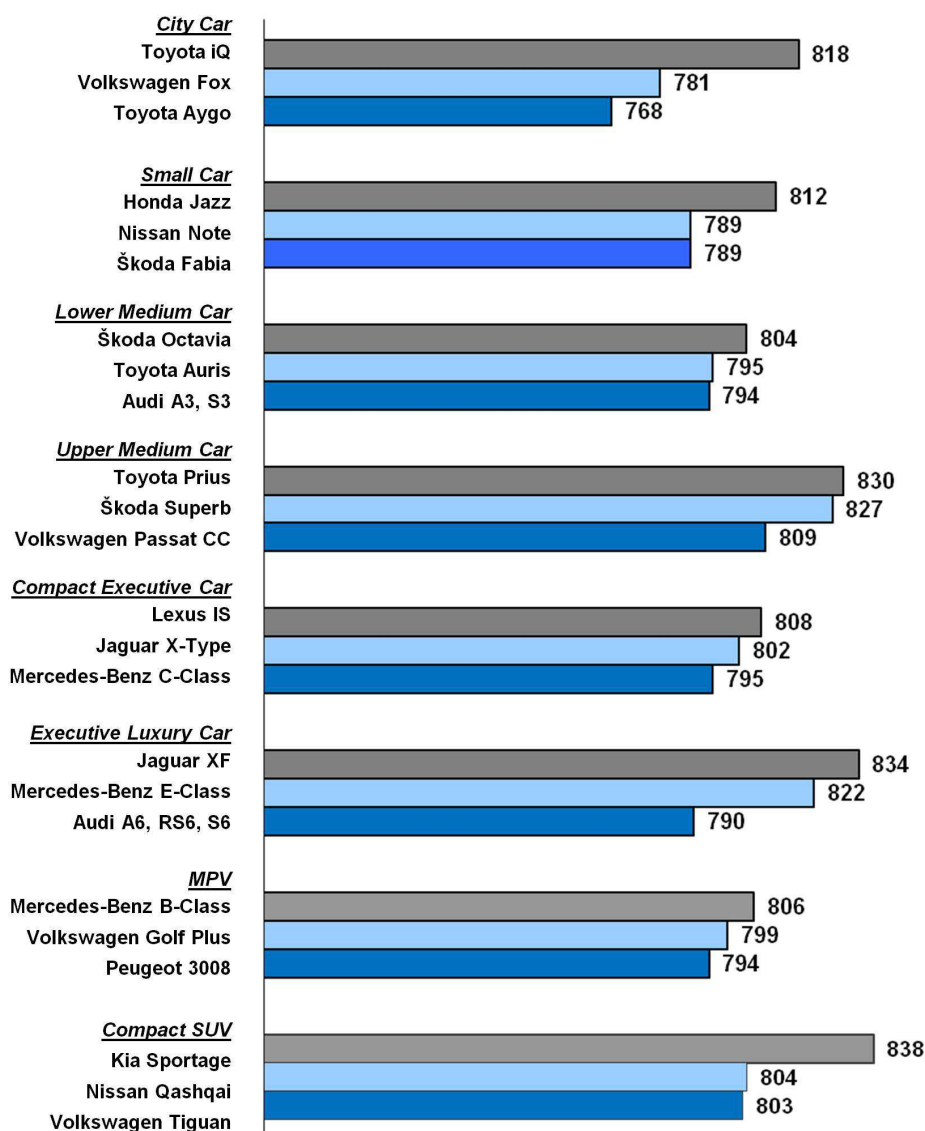
Source: J.D. Power and Associates 2012 UK Vehicle Ownership Satisfaction StudySM (VOSS)

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2012 UK Vehicle Ownership Satisfaction StudySM (VOSS)

Top Three Models per Segment Overall VOSS



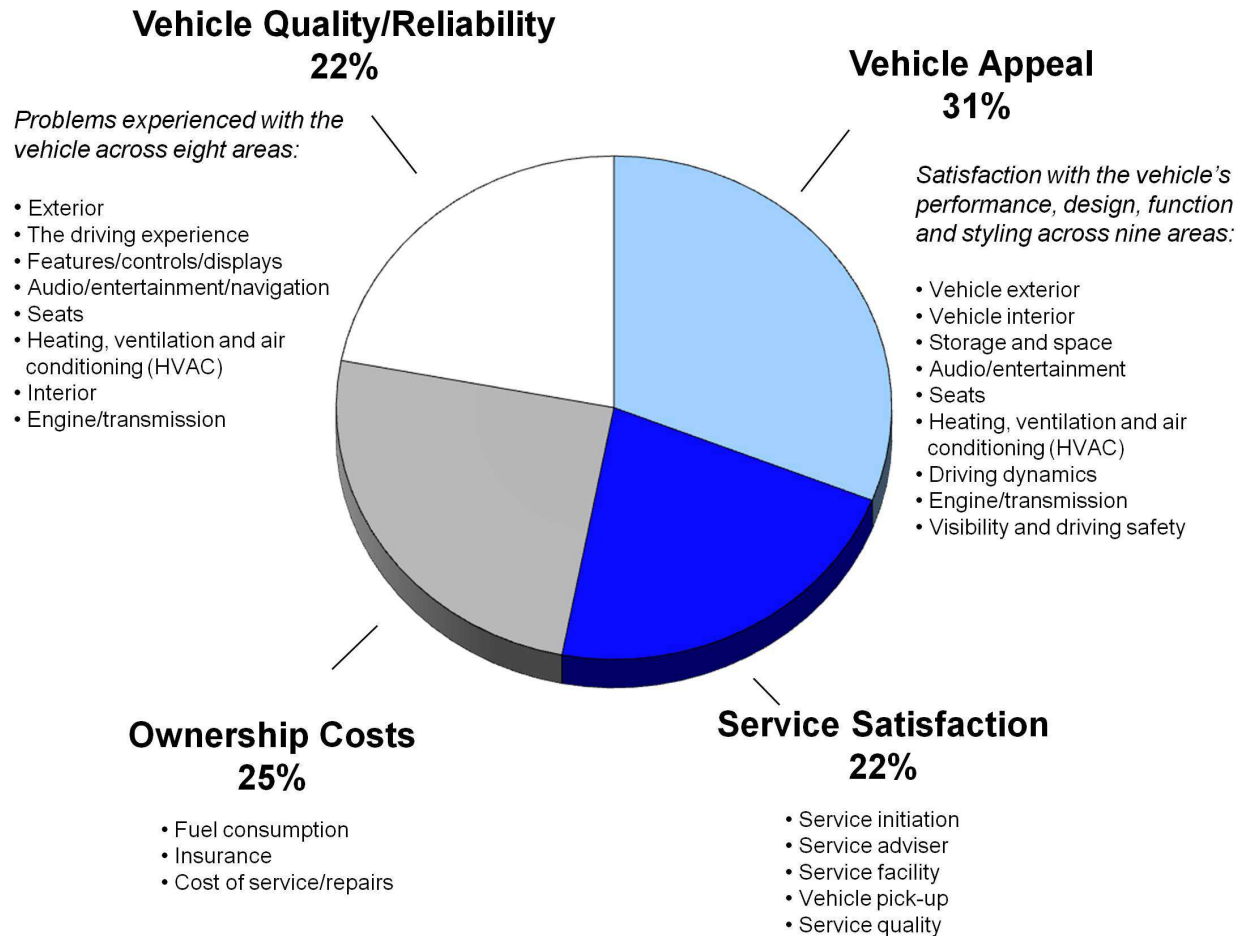
NOTE: For a segment award to be presented, there must be at least four models with sufficient sample that comprise 67 percent of market sales within an award segment. No Sporty Car or Large SUV awards have been presented due to insufficient market representation among rankable models in the segment.

Source: J.D. Power and Associates 2012 UK Vehicle Ownership Satisfaction StudySM(VOSS)

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2012 UK Vehicle Ownership Satisfaction StudySM (VOSS)

Measures Contributing to Overall Vehicle Ownership Satisfaction



Source: J.D. Power and Associates 2012 UK Vehicle Ownership Satisfaction StudySM (VOSS)

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