

# 2nd independent automobile dealer satisfaction survey

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## Introduction

Apart from the fluctuations in the market demand and regulatory changes, the financial success of a dealership depends mostly on good co-operation with the importer. The importer's activities have decisive influence on the quality and availability of cars, effectiveness of national advertising campaigns and attractiveness of discount offers. Furthermore, the importer sets the levels of dealer margins and additional investment costs, which has direct impact on the profitability of a given dealership. Similarly to the typical franchise contract, the specific nature of the importer-dealer relationship puts the latter in a weaker position. Additionally, due to high investment costs which the dealer must cover in order to enter (or leave) a given network, dealers must give in to the importers' pressure. This makes the dealer's activity a risky type of business; however, provided the relations with the importer are good, it can also be a very profitable one. What is the level of dealers' satisfaction with this co-operation?

As in the previous year, the study was carried out by the Polish Chamber of Automotive Industry Consulting (*Polska Izba Motoryzacji Consulting*) and the global consulting company Ernst & Young, in accordance with the EU and US standards.

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## Methodology



As in the previous year, the study was conducted in early autumn (1 September-31 October, 2008). The study participants were owners and managers of authorized dealerships with service centers. The individual aspects of 'dealer satisfaction' were evaluated by means of a 5-point scale (1 - lowest; 5 - highest rating).

The sample included min. 30% of all dealers of a given make, with the exception of makes with less than 20 dealerships in Poland. For such makes the minimum sample was set at 40%. The study did not cover makes with less than 10 dealerships in Poland. In total, the study resulted in 364 (331; 2007) make questionnaires, which amounts to 35% of the dealer market.

## Description

In accordance with international standards, the evaluation of 'dealer satisfaction' included three aspects of dealer-importer co-operation. The first evaluated aspect was product assessment, including all related elements, such as quality, availability and reliability. The second aspect was the producer's/importer's policy as the representative of an international concern. It consisted of evaluation of the dealer contract, competitiveness of market strategies and business approach. The third aspect concerned evaluation of the importer as a company conducting its activities in the Polish market, employing specific people and having its own corporate culture.

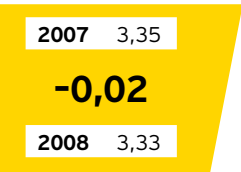
# General results

Out of 26 makes covered by the study, the highest overall dealer satisfaction rating (4.12) was scored by Mercedes (3rd place in 2007). Last year's winner, Volvo, came second, despite scoring higher than in 2007. As in the previous year, last place fell to Nissan (2.38) which also noted one of the smallest rating declines compared to 2007.

It is worth noting that there have been no dramatic changes in the final table in relation to last year. Volvo and Mercedes were the only makes to score over 4 points and strengthened their leading positions, increasing last year's scores. The only spectacular changes occurred in the case of American makes: Chrysler, GM (Opel and Chevrolet) and Ford. Chrysler scored half a point less than last year (a drop from 15th to 24th place), and Opel fell from 18th to 24th place. On the other hand, Ford achieved the highest increase - from 13th to 3rd place. Steep declines occurred in the case of BMW and Subaru - frequent leaders of dealer satisfaction studies in other EU countries.

**Table 1. General classification**

2008		Change*		
Make	Rating	Rating	Position	
1. Mercedes	4,12	+0,20	+2	
2. Volvo	4,07	+0,02	-1	
3. Ford	3,72	+0,39	+10	
4. Toyota	3,65	-0,09	0	
5. SEAT	3,63	+0,14	+2	
6. Suzuki	3,62	+0,22	+4	
7. Skoda	3,62	+0,01	-2	
8. BMW	3,49	-0,48	-6	
9. Honda	3,46	-0,03	-1	
10. Saab	3,45	N	N	
11. SsangYong	3,42	+0,06	0	
12. Volkswagen	3,35	0,00	0	
13. KIA	3,33	-0,07	-4	
14. Subaru	3,32	-0,17	-8	
15. Mitsubishi	3,30	0,00	-1	
16. Hyundai	3,30	+0,10	+1	
17. Alfa Romeo	3,28	+0,27	+5	
18. Citroen	3,27	+0,14	+1	
19. Audi	3,25	+0,14	+1	
20. Fiat	3,22	+0,02	-4	
21. Peugeot	3,11	+0,17	+2	
22. Renault	2,99	+0,05	+2	
23. Opel	2,96	-0,19	-5	
24. Chrysler	2,75	-0,50	-9	
25. Chevrolet	2,52	-0,55	-4	
26. Nissan	2,38	-0,55	-1	



\* Year over year changes of rating and position.



## Specific results

Last year's questionnaire started with a teasing question which pointed towards the past: 'Has your dealer business proved to be a profitable investment?'

As the answer to that question seems to be evident this year, it was replaced with two questions regarding the assessment of revenue growth over the past year and expected results in the coming year. In general analysis, the combination of these two evaluations replaced 'The assessment of investment in dealership.' Bearing in mind that the questions concerned somewhat different subjects, we decided not to compare the evaluations in a direct manner, but only to show changes in positions on the list.



Looking at Table 2, which shows assessment of last year's revenue growth and expectations for the coming year, we can see that Chrysler and Skoda dealers displayed the greatest decline in optimism about increased profitability of their dealerships, while Hyundai and Seat dealers showed much more optimism about their future than in the previous year.

The dealers were somewhat more critical of importers' business ethics than last year (Table 3). Last year's leaders maintained their positions, with a few exceptions. The last place, as in the previous year, fell to Nissan which scored the fewest points (1.44) of all the participants of the study.

Similarly to last year, the winner in 'importer's assistance to the dealer' category (assistance in sales, parts and service - Table 4) was Volvo, the only make to score over 4 points. Again, the bottom of the table was occupied by Chevrolet and Nissan.

Competitive quality of cars sold (Table 5) was rated the highest by BMW and Honda dealers, who thereby advanced one position compared to last year's results, among other reasons due to Subaru's fall from 1st to 5th place. Seat dealers were most satisfied with the improvement in quality of cars sold, while least satisfied were Volvo dealers which resulted in the drop of this make from 5th to 12th place.

**Table 2. Evaluation of profit increase in the present year and forecast for the coming year**

		2008		2008/2007
		Make	Rating	Rating*
1.	BMW		3,70	0
2.	Volvo		3,67	+1
3.	Mercedes		3,61	-1
4.	Subaru		3,58	0
5.	SEAT		3,54	+16
6.	Hyundai		3,54	+18
7.	Suzuki		3,50	+4
8.	Audi		3,44	+5
9.	SsangYong		3,33	+1
10.	Honda		3,32	-1
11.	Ford		3,08	+1
12.	Peugeot		3,07	+10
13.	Toyota		3,06	-7
14.	Skoda		3,00	-9
15.	Volkswagen		2,97	-7
16.	Mitsubishi		2,91	+2
17.	Saab		2,90	N
18.	Citroen		2,90	+1
19.	KIA		2,83	-5
20.	Chrysler		2,64	-13
21.	Opel		2,64	-4
22.	Fiat		2,48	-7
23.	Nissan		2,33	-3
24.	Renault		2,31	-8
25.	Chevrolet		2,07	0
26.	Alfa Romeo		1,86	-3

\* Evaluation of investment in dealership

**Table 3. Evaluation of importers' business ethics**

2008		2008/2007		
Make	Rating	Rating	Position	
1. Mercedes	4,19	0,00	+2	
2. Volvo	4,17	-0,11	0	
3. Subaru	3,64	-0,69	-2	
4. Ford	3,58	+0,51	+10	
5. SEAT	3,56	+0,46	+8	
6. Saab	3,47	N	N	
7. Suzuki	3,37	+0,33	+8	
8. Honda	3,36	+0,17	+1	
9. BMW	3,33	-0,60	-5	
10. SsangYong	3,28	-0,50	-5	
11. Skoda	3,24	-0,19	-4	
12. Toyota	3,08	-0,29	-4	
13. Alfa Romeo	3,05	+0,05	+3	
14. Chrysler	3,00	-0,67	-8	
15. KIA	2,93	-0,26	-5	
16. Hyundai	2,91	-0,19	-4	
17. Fiat	2,68	+0,04	+3	
18. Mitsubishi	2,67	-0,46	-7	
19. Volkswagen	2,61	-0,07	0	
20. Peugeot	2,52	+0,35	+4	
21. Citroen	2,42	-0,12	0	
22. Audi	2,33	-0,42	-4	
23. Opel	2,28	-0,25	-1	
24. Renault	2,28	+0,04	-1	
25. Chevrolet	2,09	-0,88	-8	
26. Nissan	1,44	-0,60	-1	

**2007** 3,13

**-0,15**

**2008** 2,98

**Table 4. Evaluation of importers' assistance**

2008		2008/2007		
Make	Rating	Rating	Position	
1. Volvo	4,22	-0,22	0	
2. Mercedes	3,85	+0,07	+1	
3. Ford	3,80	+0,34	+7	
4. SEAT	3,78	+0,30	+5	
5. Alfa Romeo	3,76	+0,50	+10	
6. Suzuki	3,74	+0,15	+1	
7. Skoda	3,57	-0,03	-1	
8. SsangYong	3,44	-0,28	-4	
9. Toyota	3,42	-0,03	+2	
10. BMW	3,40	-0,53	-8	
11. Volkswagen	3,37	+0,34	+7	
12. Fiat	3,28	-0,15	0	
13. Mitsubishi	3,27	-0,29	-5	
14. Saab	3,27	N	N	
15. Honda	3,26	-0,02	-2	
16. Audi	3,17	+0,17	+4	
17. Chrysler	3,05	-0,67	-12	
18. Citroen	3,02	-0,08	-1	
19. Peugeot	2,94	+0,21	+6	
20. Opel	2,86	-0,16	-1	
21. KIA	2,80	-0,02	+2	
22. Hyundai	2,79	-0,10	-1	
23. Renault	2,78	-0,09	-1	
24. Subaru	2,67	-0,47	-8	
25. Chevrolet	2,33	-0,93	-11	
26. Nissan	2,03	-0,78	-2	

**2007** 3,34

**-0,11**

**2008** 3,23

**Table 5. Evaluation of the quality of producers/importers' products**

2008		2008/2007		
Make	Rating	Rating	Position	
1. BMW	4,80	0,00	+1	
2. Honda	4,79	+0,14	+1	
3. Mercedes	4,56	+0,22	+7	
4. SEAT	4,50	+0,50	+10	
5. Audi	4,50	0,00	+1	
6. Subaru	4,50	-0,30	-5	
7. Volkswagen	4,38	+0,43	+8	
8. Suzuki	4,33	0,00	+1	
9. Hyundai	4,29	+0,05	+2	
10. Ford	4,25	+0,56	+7	
11. Skoda	4,22	-0,13	-4	
12. Toyota	4,19	-0,41	-8	
13. KIA	4,17	-0,17	-5	
14. SsangYong	4,17	+0,50	+4	
15. Mitsubishi	4,00	-0,13	-3	
16. Saab	4,00	N	N	
17. Volvo	3,83	-0,67	-12	
18. Opel	3,74	-0,31	-5	
19. Fiat	3,69	+0,26	+1	
20. Citroen	3,65	+0,01	-1	
21. Alfa Romeo	3,43	+0,43	+3	
22. Nissan	3,42	-0,44	-6	
23. Peugeot	3,38	-0,03	-2	
24. Renault	3,25	+0,16	-1	
25. Chrysler	2,29	-0,55	0	
26. Chevrolet	2,27	-1,03	-4	

**2007** 3,98

**-0,04**

**2008** 3,94

The dealership owner's evaluation of customer satisfaction (Table 6) seems to be one of the most subjective assessments, because in this case the dealer rates not only the importer, but also himself. This is why, as last year, the average rating was the highest in this category. Customer satisfaction increased spectacularly in the case of Ford and Audi which moved up the list by 15 and 14 positions, respectively. The greatest marked decrease in the level of post-sales customer satisfaction occurred in the case of Nissan and Ssangyong dealers.

The results in a 'product reliability' category (Table 7) combine reliability assessment in the first 3 months and in the long run with warranty programs supporting products sold. The leaders of this category were Asian and German makes: Honda, BMW, Suzuki and Mercedes, respectively. A major surprise was the 10th position of last year's leader - Toyota. Nevertheless, the average result of 3.99 for all makes can be considered very satisfying. As last year, French cars were not listed in the first 20 makes.



**Table 6. Evaluation of customer after-sales satisfaction**

	2008		2008/2007	
	Make	Rating	Rating	Position
1.	Honda	4,64	+0,21	+6
2.	Audi	4,63	+0,50	+14
3.	BMW	4,60	-0,20	-1
4.	Ford	4,55	+0,63	+15
5.	Hyundai	4,50	+0,04	+1
6.	Subaru	4,50	-0,30	-5
7.	SEAT	4,42	+0,20	+5
8.	Mercedes	4,33	+0,22	+9
9.	Toyota	4,31	-0,22	-5
10.	Volkswagen	4,29	+0,08	+3
11.	KIA	4,28	-0,28	-8
12.	Suzuki	4,22	-0,11	-2
13.	Saab	4,20	N	N
14.	SsangYong	4,17	-0,33	-9
15.	Volvo	4,17	-0,17	-6
16.	Skoda	4,17	-0,19	-8
17.	Mitsubishi	4,09	-0,16	-6
18.	Citroen	4,00	-0,14	-3
19.	Alfa Romeo	4,00	+0,40	+6
20.	Fiat	3,93	+0,19	+3
21.	Peugeot	3,86	+0,09	+1
22.	Opel	3,83	-0,22	-4
23.	Renault	3,79	+0,06	+1
24.	Nissan	3,67	-0,48	-10
25.	Chrysler	3,43	-0,40	-5
26.	Chevrolet	2,73	-1,07	-5

2007 4,19

-0,06

2008 4,13

**Table 7. Evaluation of product reliability and warranty policy**

	2008		2008/2007	
	Make	Rating	Rating	Position
1.	Honda	4,67	+0,21	+3
2.	BMW	4,67	+0,27	+4
3.	Suzuki	4,56	+0,51	+8
4.	Mercedes	4,48	+0,44	+8
5.	Volvo	4,44	0,00	0
6.	KIA	4,39	+0,02	+1
7.	SEAT	4,33	+0,21	+2
8.	Subaru	4,33	-0,13	-6
9.	Hyundai	4,31	-0,15	-6
10.	Ford	4,30	+0,36	+4
11.	Toyota	4,27	-0,22	-10
12.	SsangYong	4,17	+0,17	+1
13.	Mitsubishi	4,06	-0,19	-5
14.	Skoda	3,96	-0,14	-4
15.	Saab	3,93	N	N
16.	Audi	3,88	+0,02	+2
17.	Volkswagen	3,84	-0,07	-1
18.	Fiat	3,83	+0,16	+3
19.	Alfa Romeo	3,76	+0,56	+4
20.	Opel	3,70	-0,22	-5
21.	Renault	3,56	+0,25	+1
22.	Nissan	3,50	-0,21	-2
23.	Chrysler	3,29	-0,60	-6
24.	Citroen	3,28	+0,13	0
25.	Peugeot	3,19	+0,07	0
26.	Chevrolet	3,18	-0,54	-7

2007 3,96

+0,03

2008 3,99

**Table 8. Evaluation of distribution system**

2008		2008/2007		
Make	Rating	Rating	Position	
1. Volvo	4,50	+0,08	0	
2. Mercedes	4,39	+1,00	+12	
3. Saab	4,00	N	N	
4. SsangYong	3,92	+0,25	+3	
5. Skoda	3,92	+0,62	+11	
6. KIA	3,83	-0,08	-3	
7. BMW	3,80	-0,20	-5	
8. Suzuki	3,72	+0,77	+14	
9. Alfa Romeo	3,71	+0,01	-3	
10. Toyota	3,69	+0,35	+5	
11. Renault	3,65	+0,17	0	
12. Fiat	3,64	+0,03	-4	
13. Citroen	3,55	+0,05	-3	
14. Volkswagen	3,50	-0,29	-10	
15. Opel	3,48	+0,36	+4	
16. SEAT	3,42	-0,08	-7	
17. Mitsubishi	3,36	+0,21	+1	
18. Hyundai	3,36	-0,07	-5	
19. Ford	3,30	+0,18	+1	
20. Subaru	3,25	-0,45	-15	
21. Honda	2,97	-0,07	0	
22. Audi	2,94	+0,01	+2	
23. Peugeot	2,90	-0,30	-6	
24. Chevrolet	2,90	-0,05	-1	
25. Nissan	2,83	-0,60	-13	
26. Chrysler	2,64	+0,14	-1	

**2007** 3,40

**+0,11**

**2008** 3,51

**Table 9. Evaluation of importers' marketing programs**

2008		2008/2007		
Make	Rating	Rating	Position	
1. Mercedes	4,28	+0,56	+2	
2. Volvo	3,75	-0,08	-1	
3. Toyota	3,72	-0,07	-1	
4. Suzuki	3,61	+0,06	0	
5. Citroen	3,48	+0,15	+2	
6. Skoda	3,42	+0,04	0	
7. Saab	3,40	N	N	
8. Mitsubishi	3,32	+0,51	+9	
9. SEAT	3,29	-0,21	-4	
10. Hyundai	3,21	+0,41	+8	
11. Subaru	3,08	+0,08	+1	
12. Ford	3,08	+0,11	+1	
13. Volkswagen	3,03	+0,03	-4	
14. Audi	3,00	+0,43	+10	
15. SsangYong	3,00	+0,08	0	
16. Fiat	2,98	+0,15	0	
17. KIA	2,97	-0,03	-6	
18. Renault	2,88	+0,17	+3	
19. Honda	2,86	-0,14	-9	
20. Peugeot	2,71	+0,10	+2	
21. Opel	2,70	-0,25	-7	
22. BMW	2,60	-0,70	-14	
23. Alfa Romeo	2,57	-0,03	0	
24. Chevrolet	2,23	-0,57	-5	
25. Chrysler	2,14	-0,66	-5	
26. Nissan	1,83	-0,74	-1	

**2007** 3,05

**-0,01**

**2008** 3,04

Table 8 shows assessment of the car distribution system. In this category a final rating applied to the availability of particular models and waiting time for cars ordered. The best result again was achieved by Volvo. Mercedes moved up the list by 12 positions. Skoda and Suzuki also visibly improved their results, while Volkswagen, Subaru and Nissan fell down the list. The last place, as usual, fell to Chrysler, despite a slight improvement compared to the previous year.

Dealers voiced similar opinions on marketing programs (Table 9) that support the sales processes and contribute to the improvement of after-sales customer satisfaction (reducing so-called after-sales dissonance). It is worth highlighting the result of Mercedes which, as the only make, scored more than 4 points, leaving the competition far behind. The biggest change in the table was the drop of BMW by 14 positions.



The dealers assessed advertising support on the part of importers (Table 10) in a similar way. The highest marks were achieved by: Suzuki, Mercedes, Volvo and Toyota. Last place was taken by Nissan (15 positions lower than last year).

Table 11 shows assessment of importers' interest in product image and quality as well as loyalty marketing programs. Mercedes, Suzuki and Volvo scored over 4 points in this category. On the other hand, last year's leader, BMW, fell down the list by 17 positions.

Table 12 is a classification of importers' consent to independent activities undertaken by dealers in the field of marketing, advertising and customer retention programs. In general, compared to the previous year, the dealers had better opinions about importers in this respect. Ford topped the list (moving from the 16th position), while BMW fell from the 1st to 19th place.

The next table (Table 13) shows the level of importers' acceptance for dealer activities not covered by the dealer contract. Last year's average rating in this category was less than 3 points, which was one of the worst results of all categories. This year's increase by 0.27 is the largest change in all the tables presented and a sign of general improvement in dealer satisfaction in this category.

**Table 10. Evaluation of importers' advertising support**

		2008		2008/2007	
		Make	Rating	Rating	Position
1.	Suzuki		4,00	+0,35	+2
2.	Mercedes		3,83	-0,11	-1
3.	Volvo		3,83	+0,33	+1
4.	Toyota		3,69	-0,15	-2
5.	Saab		3,60	N	N
6.	Subaru		3,42	+0,52	+6
7.	Skoda		3,33	-0,14	-2
8.	SEAT		3,29	-0,17	-2
9.	Volkswagen		3,26	+0,08	-1
10.	Fiat		3,23	+0,47	+4
11.	Citroen		3,23	-0,10	-4
12.	Mitsubishi		3,09	+0,40	+7
13.	Opel		2,96	-0,16	-4
14.	Audi		2,94	+0,29	+6
15.	KIA		2,92	+0,22	+2
16.	Hyundai		2,89	+0,35	+5
17.	Honda		2,89	+0,04	-4
18.	Peugeot		2,86	+0,15	-2
19.	Renault		2,79	+0,38	+3
20.	Ford		2,65	-0,04	-2
21.	Alfa Romeo		2,64	+0,64	+3
22.	Chevrolet		2,57	-0,43	-12
23.	SsangYong		2,42	+0,08	0
24.	Chrysler		1,93	-0,82	-9
25.	BMW		1,80	-0,10	0
26.	Nissan		1,79	-1,11	-15

**2007** 2,93  
**+0,06**  
**2008** 2,99

Table 11. Evaluation of importers' interest in dealers' opinions

2008		2008/2007		
Make	Rating	Rating	Position	
1. Mercedes	4,30	+0,26	+1	
2. Suzuki	4,19	+0,82	+6	
3. Volvo	4,17	+0,50	+2	
4. Toyota	3,69	-0,26	0	
5. Saab	3,60	N	N	
6. Ford	3,50	+0,32	+8	
7. Subaru	3,50	-0,50	-4	
8. Skoda	3,42	+0,12	+3	
9. SEAT	3,36	-0,16	-3	
10. KIA	3,35	+0,04	-1	
11. Honda	3,31	0,00	-1	
12. Alfa Romeo	3,22	+0,49	+7	
13. Mitsubishi	3,20	-0,17	-6	
14. Audi	3,17	+0,69	+10	
15. Hyundai	3,14	+0,37	+3	
16. Volkswagen	3,14	+0,07	0	
17. SsangYong	3,11	-0,03	-2	
18. BMW	3,07	-1,27	-17	
19. Citroen	3,05	+0,34	+2	
20. Fiat	2,95	+0,11	-3	
21. Peugeot	2,92	+0,56	+4	
22. Renault	2,90	+0,40	+1	
23. Opel	2,77	+0,15	-1	
24. Chevrolet	2,62	-0,58	-11	
25. Chrysler	2,57	-0,71	-13	
26. Nissan	2,00	-0,71	-6	

2007 3,19

**+0,05**

2008 3,24

Table 12. Importers' authorisation for dealers to conduct their own marketing initiatives

2008		2008/2007		
Make	Rating	Rating	Position	
1. Ford	4,23	+0,88	+15	
2. Mercedes	4,11	-0,11	0	
3. Skoda	4,08	+0,51	+8	
4. Toyota	4,03	+0,16	0	
5. Volvo	4,00	+0,33	+2	
6. Saab	4,00	N	N	
7. SEAT	3,92	+0,13	-2	
8. Volkswagen	3,91	+0,46	+7	
9. Alfa Romeo	3,86	+0,26	0	
10. Subaru	3,83	-0,07	-7	
11. Hyundai	3,82	+0,28	+2	
12. Honda	3,75	+0,07	-6	
13. Mitsubishi	3,73	+0,45	+7	
14. KIA	3,61	-0,03	-6	
15. SsangYong	3,58	+0,48	+8	
16. Citroen	3,50	+0,39	+6	
17. Fiat	3,46	+0,14	0	
18. Audi	3,44	+0,13	0	
19. BMW	3,40	-1,00	-18	
20. Suzuki	3,39	+0,08	-1	
21. Peugeot	3,26	+0,20	+3	
22. Opel	3,17	-0,30	-8	
23. Renault	3,13	+0,28	+2	
24. Chevrolet	3,07	-0,48	-12	
25. Chrysler	2,93	-0,65	-15	
26. Nissan	2,88	-0,27	-5	

2007 3,51

**+0,11**

2008 3,62

Table 13. Importers' authorisation for dealers to conduct activities not covered by dealer contract

2008		2008/2007		
Make	Rating	Rating	Position	
1. Volvo	4,17	+1,00	+5	
2. Mercedes	3,89	+0,78	+5	
3. Alfa Romeo	3,86	+1,06	+15	
4. SsangYong	3,83	+0,83	+11	
5. Ford	3,70	+0,70	+8	
6. Skoda	3,67	+0,67	+6	
7. SEAT	3,58	+0,23	-3	
8. BMW	3,50	-0,30	-7	
9. Volkswagen	3,47	+0,37	-1	
10. Mitsubishi	3,45	+0,39	0	
11. KIA	3,44	+0,39	0	
12. Saab	3,40	N	N	
13. Hyundai	3,36	-0,06	-10	
14. Subaru	3,33	-0,27	-12	
15. Fiat	3,25	+0,34	+1	
16. Citroen	3,05	+0,62	+5	
17. Honda	3,00	-0,07	-8	
18. Toyota	2,94	-0,26	-13	
19. Peugeot	2,67	+0,25	+3	
20. Suzuki	2,67	-0,33	-6	
21. Opel	2,65	-0,03	-2	
22. Audi	2,63	+0,34	+3	
23. Chevrolet	2,60	+0,20	+1	
24. Chrysler	2,57	-0,26	-7	
25. Renault	2,54	+0,13	-2	
26. Nissan	2,33	-0,24	-6	

2007 2,95

**+0,26**

2008 3,21

**Table 14.**  
Evaluation of  
co-operation  
with producers/  
importers

2008		2008/2007		
Make	Rating	Rating	Position	
1. Volvo	4,11	-0,11	0	
2. Mercedes	4,04	0,00	0	
3. SEAT	3,53	+0,50	+10	
4. Ford	3,50	+0,40	+7	
5. SsangYong	3,44	+0,22	+3	
6. Saab	3,40	N	N	
7. Toyota	3,31	-0,33	-3	
8. Skoda	3,30	-0,02	-1	
9. Suzuki	3,26	+0,26	+5	
10. Subaru	3,17	-0,43	-5	
11. Honda	3,14	+0,11	+1	
12. KIA	3,07	-0,04	-2	
13. BMW	3,07	-0,90	-10	
14. Volkswagen	2,99	+0,16	+3	
15. Mitsubishi	2,97	-0,16	-6	
16. Hyundai	2,93	+0,03	0	
17. Alfa Romeo	2,90	+0,10	+1	
18. Audi	2,88	+0,13	+2	
19. Fiat	2,83	+0,06	0	
20. Chrysler	2,71	-0,62	-14	
21. Peugeot	2,60	+0,21	+3	
22. Citroen	2,57	-0,05	+1	
23. Opel	2,51	-0,14	-2	
24. Chevrolet	2,33	-0,63	-9	
25. Renault	2,29	+0,02	0	
26. Nissan	1,61	-1,01	-4	

2007 3,09

**-0,07**

2008 3,02

**Table 15.** Evaluation  
of importers'  
managers

2008		2008/2007		
Make	Rating	Rating	Position	
1. Volvo	4,43	-0,03	0	
2. Mercedes	4,04	+0,04	0	
3. Ford	3,94	+0,60	+5	
4. Skoda	3,60	+0,18	+2	
5. Saab	3,56	N	N	
6. SsangYong	3,47	+0,27	+5	
7. SEAT	3,47	+0,10	0	
8. Toyota	3,31	-0,14	-3	
9. BMW	3,28	-0,36	-5	
10. Citroen	3,24	+0,03	0	
11. KIA	3,22	+0,03	+1	
12. Suzuki	3,18	-0,14	-3	
13. Volkswagen	3,14	+0,06	+3	
14. Subaru	3,13	-0,51	-11	
15. Mitsubishi	3,09	-0,03	0	
16. Hyundai	3,06	+0,12	+1	
17. Peugeot	3,00	+0,42	+7	
18. Honda	2,89	-0,25	-4	
19. Fiat	2,77	-0,05	+4	
20. Renault	2,75	-0,14	0	
21. Alfa Romeo	2,74	-0,10	0	
22. Opel	2,72	-0,20	-4	
23. Audi	2,68	-0,15	-1	
24. Chrysler	2,60	-0,57	-11	
25. Chevrolet	2,41	-0,49	-6	
26. Nissan	1,84	-0,57	-1	

2007 3,20

**-0,06**

2008 3,14

Table 14 shows evaluation of dealer-importer relations in the context of everyday co-operation, handling complaints and managing the network by the importer. In this category, as in the previous year, Volvo and Mercedes were first, while Renault and Nissan came last.

The dealers also evaluated the competence of importers' managers (Table 15). They assessed the following aspects: task management, goal achievement, realization of commitments to dealer and the quality of contact and assistance in fleet sales. Similarly to 2007, Volvo importer managers were the unquestionable leaders in this category. There was also no change in last place; it fell to Nissan which score tumbled 0.57 points compared to last year.

The next 'dealer satisfaction' indicator concerned training programs organized by the importer. It evaluated the quality and effectiveness of training programs as well as the convenience of dates. As far as sales training programs were concerned (Table 16), the dealers rated Volvo and Mercedes the best again while Subaru and Chevrolet were voted as the worst. The best car-service training programs were organized by Volvo and Toyota and the worst by Chevrolet and Nissan (Table 17).

**Table 16.**  
Evaluation  
of sales training  
programs

2008		2008/2007		
Make	Rating	Rating	Position	
1. Volvo	4,33	0,00	0	
2. Mercedes	3,96	-0,26	0	
3. Skoda	3,94	+0,15	+2	
4. Toyota	3,94	+0,25	+5	
5. Ford	3,87	+0,48	+8	
6. Mitsubishi	3,76	+0,22	+5	
7. SEAT	3,75	+0,06	+1	
8. Suzuki	3,74	-0,03	-1	
9. Audi	3,67	+0,50	+8	
10. KIA	3,63	-0,24	-6	
11. BMW	3,60	-0,53	-8	
12. SsangYong	3,50	-0,28	-6	
13. Citroen	3,40	+0,04	+1	
14. Saab	3,33	N	N	
15. Hyundai	3,19	+0,19	+3	
16. Peugeot	3,19	+0,19	+3	
17. Honda	3,17	-0,48	-7	
18. Volkswagen	3,06	-0,36	-6	
19. Chrysler	3,00	+0,36	+6	
20. Renault	3,00	-0,18	-4	
21. Alfa Romeo	2,90	+0,04	+2	
22. Fiat	2,75	-0,22	-2	
23. Opel	2,65	-0,28	-1	
24. Nissan	2,56	-0,40	-3	
25. Subaru	2,44	-0,29	-1	
26. Chevrolet	2,40	-0,83	-11	

**2007** 3,41

**-0,07**

**2008** 3,34

**Table 17.**  
Evaluation  
of car-service  
training programs

2008		2008/2007		
Make	Rating	Rating	Position	
1. Volvo	4,17	-0,06	+2	
2. Toyota	4,06	+0,13	+2	
3. Alfa Romeo	4,06	+0,52	+10	
4. Mercedes	4,04	-0,26	-3	
5. Ford	3,97	+0,74	+13	
6. Mitsubishi	3,76	+0,16	+6	
7. Suzuki	3,74	+0,11	+3	
8. SEAT	3,69	+0,05	0	
9. Skoda	3,59	-0,03	+2	
10. BMW	3,53	-0,73	-8	
11. Fiat	3,51	-0,17	-4	
12. KIA	3,47	-0,32	-7	
13. Volkswagen	3,39	+0,12	+3	
14. SsangYong	3,39	-0,33	-8	
15. Honda	3,38	-0,26	-6	
16. Audi	3,38	-0,13	-2	
17. Peugeot	3,33	+0,10	0	
18. Subaru	3,28	+0,28	+5	
19. Citroen	3,27	-0,04	-4	
20. Chrysler	3,24	+0,24	+2	
21. Hyundai	3,21	+0,24	+3	
22. Renault	3,21	+0,12	-1	
23. Saab	3,20	N	N	
24. Opel	2,99	-0,24	-5	
25. Chevrolet	2,82	-0,38	-5	
26. Nissan	2,43	-0,38	-1	

**2007** 3,50

**-0,03**

**2008** 3,47





Table 18 shows the evaluation of spare parts availability, taking into account waiting time and availability in normal and special modes. The results in this category varied extensively. As in the previous year, the best rating was given to Mercedes and the worst to Subaru and Chevrolet. BMW saw a marked drop in its position (from 2nd to 13th place).

The dealers once again expressed their dissatisfaction with the effectiveness of the DMS IT system imposed on them by the importer (Table 19). However, Mercedes and Suzuki dealers gave a better mark to the system operating inside the network compared to 2007. BMW, Audi and Chrysler dealers were less satisfied than in the previous year.

Table 20 shows dealers' opinions concerning importer car financing instruments. Here, the dealers took into account the competitiveness of offers for financing new and used cars, the length of the credit procedure and the overall assessment of credit programs as well as their coherence. This time the best marks were scored by Mercedes, Volvo, Citroen and its sister-make Peugeot.

The last question concerned overall evaluation of co-operation with the importer. The results in this table, similarly to the 2007 edition, fairly closely reflected the general results of the dealer satisfaction study (Table 21).

**Table 18. Evaluation of spare parts availability**

	2008		2008/2007	
	Make	Rating	Rating	Position
1.	Mercedes	4,70	+0,41	0
2.	Toyota	4,17	+0,14	+1
3.	Honda	4,17	+0,17	+2
4.	Ford	4,17	+0,19	+2
5.	Renault	4,07	+0,05	-1
6.	Peugeot	3,95	+0,09	+3
7.	Volvo	3,94	0,00	0
8.	Citroen	3,93	+0,50	+8
9.	Volkswagen	3,84	-0,09	-1
10.	Audi	3,83	+0,29	+4
11.	Fiat	3,81	+0,17	+1
12.	Skoda	3,70	+0,02	-2
13.	BMW	3,67	-0,40	-11
14.	Suzuki	3,56	+0,16	+4
15.	Alfa Romeo	3,52	+0,12	+2
16.	Chrysler	3,43	-0,13	-3
17.	Opel	3,41	-0,27	-6
18.	SEAT	3,34	+0,30	+2
19.	Mitsubishi	3,12	+0,18	+3
20.	SsangYong	3,11	+0,11	+1
21.	Nissan	3,08	-0,11	-2
22.	Saab	2,93	N	N
23.	Hyundai	2,86	-0,63	-8
24.	KIA	2,76	+0,07	0
25.	Subaru	2,33	0,00	0
26.	Chevrolet	2,31	-0,46	-3

2007 3,52

+0,01

2008 3,53

**Table 19. Evaluation of IT systems implemented by importers**

2008		2008/2007		
Make	Rating	Rating	Position	
1. Ford	3,70	+0,51	+5	
2. Volvo	3,68	-0,04	-1	
3. Mercedes	3,44	+0,89	+17	
4. Skoda	3,34	-0,16	-2	
5. Honda	3,30	+0,11	0	
6. Alfa Romeo	3,29	+0,35	+5	
7. Peugeot	3,14	+0,10	3	
8. Toyota	3,13	+0,41	9	
9. SEAT	3,11	-0,27	-6	
10. Fiat	3,04	-0,15	-3	
11. Suzuki	3,04	+0,80	+12	
12. Citroen	3,03	+0,49	+9	
13. Volkswagen	2,88	-0,21	-5	
14. Saab	2,70	N	N	
15. Mitsubishi	2,70	-0,18	-2	
16. SsangYong	2,67	-0,11	-1	
17. BMW	2,67	-0,57	-13	
18. Renault	2,58	-0,11	0	
19. Audi	2,58	-0,50	-10	
20. KIA	2,54	-0,37	-8	
21. Opel	2,47	-0,30	-5	
22. Chevrolet	2,29	-0,29	-3	
23. Hyundai	2,29	-0,07	-1	
24. Subaru	2,17	+0,10	+1	
25. Chrysler	2,10	-0,73	-11	
26. Nissan	1,94	-0,19	-2	

**2007** 2,86

**-0,02**

**2008** 2,84

**Table 20. Evaluation of financial products for purchasing cars**

2008		2008/2007		
Make	Rating	Rating	Position	
1. Mercedes	3,94	+0,25	+1	
2. Volvo	3,88	+0,54	+5	
3. Citroen	3,76	+0,96	+16	
4. Peugeot	3,73	+0,35	+2	
5. Ford	3,60	+0,55	+8	
6. Toyota	3,45	+0,02	-3	
7. BMW	3,35	-0,35	-6	
8. Fiat	3,34	-0,06	-3	
9. Skoda	3,33	-0,07	-5	
10. Renault	3,32	+0,08	0	
11. SEAT	3,25	+0,21	+3	
12. Alfa Romeo	3,25	+0,30	+3	
13. KIA	3,14	+0,30	+4	
14. Subaru	2,98	+0,95	+11	
15. Suzuki	2,97	+0,60	+6	
16. Opel	2,95	-0,31	-7	
17. Audi	2,91	+0,56	+5	
18. Hyundai	2,85	+0,54	+6	
19. Volkswagen	2,78	-0,43	-8	
20. Chevrolet	2,77	-0,40	-8	
21. Saab	2,76	N	N	
22. Honda	2,73	-0,09	-4	
23. SsangYong	2,71	+0,38	0	
24. Chrysler	2,64	-0,65	-16	
25. Mitsubishi	2,50	-0,08	-5	
26. Nissan	2,31	-0,62	-10	

**2007** 3,00

**+0,12**

**2008** 3,12

**Table 21. General evaluation of co-operation with importers**

2008		2008/2007		
Make	Rating	Rating	Position	
1. Mercedes	4,33	+0,33	+2	
2. Volvo	4,00	-0,33	-1	
3. BMW	4,00	-0,20	-1	
4. Suzuki	3,67	+0,27	+8	
5. SsangYong	3,67	0,00	+1	
6. Ford	3,65	+0,23	+5	
7. Skoda	3,59	-0,04	+2	
8. Honda	3,57	-0,07	0	
9. Toyota	3,56	-0,10	-4	
10. SEAT	3,50	+0,07	0	
11. Hyundai	3,43	+0,12	+4	
12. Saab	3,40	N	N	
13. KIA	3,33	-0,04	+1	
14. Subaru	3,33	-0,47	-10	
15. Alfa Romeo	3,14	+0,89	+10	
16. Volkswagen	3,12	+0,01	0	
17. Citroen	3,05	+0,20	+4	
18. Mitsubishi	3,00	-0,38	-5	
19. Audi	3,00	0,00	-1	
20. Peugeot	3,00	+0,18	+2	
21. Fiat	2,95	-0,09	-4	
22. Chrysler	2,86	-0,81	-15	
23. Opel	2,82	-0,13	-4	
24. Renault	2,79	0,25	-1	
25. Chevrolet	2,33	-0,57	-5	
26. Nissan	1,73	-0,67	-2	

**2007** 3,31

**-0,05**

**2008** 3,26

## General classification

Table 22.

Make	Mark	1.	2.	3.	4.	5.	6.	7.	8.	9.
1. Mercedes	<b>4,12</b>	3,61	4,19 (0,00)	3,85 (+0,07)	4,56 (+0,22)	4,33 (+0,22)	4,48 (+0,44)	4,39 (+1,00)	4,28 (+0,56)	3,83 (-0,11)
2. Volvo	<b>4,07</b>	3,67	4,17 (-0,11)	4,22 (-0,22)	3,83 (-0,67)	4,17 (-0,19)	4,44 (0)	4,50 (+0,08)	3,75 (-0,08)	3,83 (+0,33)
3. Ford	<b>3,72</b>	3,08	3,58 (+0,51)	3,80 (+0,34)	4,25 (+0,56)	4,55 (+0,63)	4,30 (+0,36)	3,30 (+0,18)	3,08 (+0,11)	2,65 (-0,04)
4. Toyota	<b>3,65</b>	3,06	3,08 (-0,29)	3,42 (-0,03)	4,19 (-0,41)	4,31 (-0,22)	4,27 (-0,22)	3,69 (+0,35)	3,72 (-0,07)	3,69 (-0,15)
5. SEAT	<b>3,63</b>	3,54	3,56 (+0,46)	3,78 (+0,30)	4,50 (+0,50)	4,42 (+0,20)	4,33 (-0,13)	3,42 (-0,08)	3,29 (-0,21)	3,29 (-0,17)
6. Suzuki	<b>3,62</b>	3,50	3,37 (+0,33)	3,74 (+0,15)	4,33 (0)	4,22 (-0,11)	4,56 (+0,51)	3,72 (+0,77)	3,61 (+0,06)	4,00 (+0,35)
7. Skoda	<b>3,62</b>	3,00	3,24 (-0,19)	3,57 (-0,03)	4,22 (-0,13)	4,17 (-0,33)	3,96 (-0,14)	3,92 (+0,62)	3,42 (+0,04)	3,33 (-0,14)
8. BMW	<b>3,49</b>	3,70	3,33 (-0,60)	3,40 (-0,53)	4,80 (0)	4,60 (-0,20)	4,67 (+0,27)	3,80 (-0,20)	2,60 (-0,70)	1,80 (-0,10)
9. Honda	<b>3,46</b>	3,32	3,36 (+0,17)	3,26 (-0,02)	4,79 (+0,14)	4,64 (+0,21)	4,67 (+0,21)	2,97 (-0,07)	2,86 (-0,14)	2,89 (+0,04)
10. Saab	<b>3,45</b>	2,90	3,47 (N)	3,27 (N)	4,00 (N)	4,20 (N)	3,90 (N)	4,00 (N)	3,40 (N)	3,60 (N)
11. SsangYong	<b>3,42</b>	3,33	3,28 (-0,50)	3,44 (-0,28)	4,17 (-0,17)	4,17 (-0,17)	4,17 (+0,17)	3,92 (+0,25)	3,00 (+0,43)	2,42 (+0,08)
12. Volkswagen	<b>3,35</b>	2,97	2,61 (-0,07)	3,37 (+0,34)	4,38 (+0,43)	4,29 (+0,08)	3,84 (-0,07)	3,50 (-0,29)	3,03 (+0,03)	3,26 (+0,08)
13. KIA	<b>3,33</b>	2,83	2,93 (-0,26)	2,80 (-0,02)	4,17 (+0,50)	4,28 (-0,28)	4,39 (+0,02)	3,83 (-0,08)	2,97 (-0,03)	2,92 (+0,22)
14. Subaru	<b>3,32</b>	3,58	3,64 (-0,69)	2,67 (-0,47)	4,50 (-0,30)	4,50 (+0,04)	4,33 (+0,21)	3,25 (-0,45)	3,08 (+0,08)	3,42 (+0,52)
15. Mitsubishi	<b>3,30</b>	2,91	2,67 (-0,46)	3,27 (-0,29)	4,00 (-0,13)	4,09 (-0,16)	4,06 (-0,19)	3,36 (+0,21)	3,32 (+0,51)	3,09 (+0,40)
16. Hyundai	<b>3,30</b>	3,54	2,91 (-0,19)	2,79 (-0,10)	4,29 (+0,05)	4,50 (-0,30)	4,31 (-0,15)	3,36 (-0,07)	3,21 (+0,41)	2,89 (+0,35)
17. Alfa Romeo	<b>3,28</b>	1,86	3,05 (+0,05)	3,76 (+0,50)	3,43 (+0,43)	4,00 (+0,40)	3,76 (+0,56)	3,71 (+0,01)	2,57 (-0,03)	2,64 (+0,64)
18. Citroen	<b>3,27</b>	2,90	2,42 (-0,12)	3,02 (-0,08)	3,65 (+0,01)	4,00 (-0,14)	3,28 (+0,13)	3,55 (+0,05)	3,48 (+0,15)	3,23 (-0,10)
19. Audi	<b>3,25</b>	3,44	2,33 (-0,42)	3,17 (+0,17)	4,50 (0)	4,63 (+0,50)	3,88 (+0,02)	2,94 (+0,01)	3,00 (+0,08)	2,94 (+0,29)
20. Fiat	<b>3,22</b>	2,48	2,68 (+0,04)	3,28 (-0,15)	3,69 (+0,26)	3,93 (+0,19)	3,83 (+0,16)	3,64 (+0,03)	2,98 (+0,15)	3,23 (+0,47)
21. Peugeot	<b>3,11</b>	3,07	2,52 (+0,35)	2,94 (+0,21)	3,38 (-0,03)	3,86 (+0,09)	3,19 (+0,07)	2,90 (-0,30)	2,71 (+0,10)	2,86 (+0,15)
22. Renault	<b>2,99</b>	2,31	2,28 (+0,04)	2,78 (-0,09)	3,25 (+0,16)	3,79 (+0,06)	3,56 (+0,25)	3,65 (+0,17)	2,88 (+0,17)	2,79 (+0,38)
23. Opel	<b>2,96</b>	2,64	2,28 (-0,25)	2,86 (-0,16)	3,74 (-0,31)	3,83 (-0,22)	3,70 (-0,22)	3,48 (+0,36)	2,70 (-0,25)	2,96 (-0,16)
24. Chrysler	<b>2,75</b>	2,64	3,00 (-0,67)	3,05 (-0,67)	2,29 (-0,55)	3,43 (-0,40)	3,29 (-0,60)	2,64 (+0,14)	2,14 (-0,66)	1,93 (-0,82)
25. Chevrolet	<b>2,52</b>	2,07	2,09 (-0,88)	2,33 (-0,93)	2,27 (-1,03)	2,73 (-1,07)	3,18 (-0,54)	2,90 (-0,05)	2,23 (-0,57)	2,57 (-0,43)
26. Nissan	<b>2,38</b>	2,33	1,44 (-0,60)	2,03 (-0,78)	3,42 (-0,44)	3,67 (-0,48)	3,50 (-0,21)	2,83 (-0,60)	1,83 (-0,74)	1,79 (-1,11)
<b>Average</b>	<b>3,33</b>	<b>3,01</b>	<b>2,98</b>	<b>3,23</b>	<b>3,94</b>	<b>4,13</b>	<b>3,99</b>	<b>3,51</b>	<b>3,04</b>	<b>2,99</b>

Table 22 - cont.

Make	10.	11.	12.	13.	14.	15.	16.	17.	18.	19.	20.
1. Mercedes	4,30 (+0,26)	4,11 (-0,11)	3,89 (+0,78)	4,04 (0)	4,04 (-0,04)	3,96 (-0,26)	4,04 (-0,26)	4,70 (+0,41)	3,44 (+0,89)	3,94 (+0,25)	4,33 (+0,33)
2. Volvo	4,17 (+0,50)	4,00 (+0,33)	4,17 (+1)	4,11 (-0,11)	4,43 (+0,03)	4,33 (0)	4,17 (-0,06)	3,94 (0)	3,68 (-0,04)	3,88 (+0,54)	4,00 (-0,33)
3. Ford	3,50 (-0,50)	4,23 (+0,88)	3,70 (+0,70)	3,50 (+0,40)	3,94 (-0,60)	3,87 (+0,48)	3,97 (+0,74)	4,17 (+0,17)	3,70 (+0,51)	3,60 (+0,55)	3,65 (+0,23)
4. Toyota	3,69 (-0,26)	4,03 (+0,16)	2,94 (-0,26)	3,31 (-0,33)	3,31 (+0,14)	3,94 (+0,25)	4,06 (+0,13)	4,17 (+0,14)	3,13 (+0,41)	3,45 (+0,02)	3,56 (-0,10)
5. SEAT	3,36 (-0,16)	3,92 (+0,13)	3,58 (+0,23)	3,53 (+0,50)	3,47 (-0,10)	3,75 (+0,06)	3,69 (+0,05)	3,34 (+0,30)	3,11 (-0,27)	3,25 (+0,30)	3,50 (+0,07)
6. Suzuki	4,19 (+0,82)	3,39 (+0,08)	2,67 (+0,25)	3,26 (+0,26)	3,18 (+0,14)	3,74 (-0,03)	3,74 (+0,11)	3,56 (+0,16)	3,04 (+0,80)	2,97 (+0,60)	3,67 (+0,27)
7. Skoda	3,42 (+0,12)	4,08 (+0,51)	3,67 (+0,67)	3,30 (-0,02)	3,60 (-0,18)	3,94 (+0,15)	3,59 (-0,03)	3,70 (+0,02)	3,34 (-0,16)	3,33 (-0,07)	3,59 (-0,04)
8. BMW	3,07 (-1,27)	3,40 (-1)	3,50 (-0,30)	3,07 (-0,90)	3,28 (+0,36)	3,60 (-0,53)	3,53 (-0,73)	3,67 (-0,40)	2,67 (-0,11)	3,35 (-0,35)	4,00 (-0,20)
9. Honda	3,31 (0)	3,75 (+0,07)	3,00 (-0,07)	3,14 (+0,11)	2,89 (+0,25)	3,17 (-0,48)	3,38 (-0,26)	4,17 (+0,19)	3,30 (+0,11)	2,73 (-0,09)	3,57 (-0,07)
10. Saab	3,60 (N)	4,00 (N)	3,40 (N)	3,40 (N)	3,56 (N)	3,33 (N)	3,20 (N)	2,93 (N)	2,70 (N)	2,76 (N)	3,40 (N)
11. SsangYong	3,11 (-0,03)	3,58 (+0,48)	3,83 (+0,83)	3,44 (+0,22)	3,47 (-0,27)	3,50 (-0,28)	3,39 (-0,33)	3,11 (+0,11)	2,67 (-0,57)	2,71 (+0,38)	3,67 (0)
12. Volkswagen	3,14 (+0,07)	3,91 (+0,46)	3,47 (+0,37)	2,99 (+0,16)	3,14 (-0,06)	3,06 (-0,36)	3,39 (+0,12)	3,84 (-0,09)	2,88 (-0,21)	2,78 (-0,43)	3,12 (+0,01)
13. KIA	3,35 (+0,04)	3,61 (-0,03)	3,44 (+0,39)	3,07 (-0,04)	3,22 (-0,03)	3,63 (-0,24)	3,47 (-0,32)	2,76 (+0,07)	2,54 (-0,37)	3,14 (+0,3)	3,33 (-0,04)
14. Subaru	3,50 (+0,32)	3,83 (-0,07)	3,33 (-0,27)	3,17 (-0,43)	3,13 (+0,51)	2,44 (-0,29)	3,28 (+0,28)	2,33 (0)	2,17 (+0,10)	2,98 (+0,95)	3,33 (-0,47)
15. Mitsubishi	3,20 (-0,17)	3,73 (+0,45)	3,45 (+0,39)	2,97 (-0,16)	3,09 (+0,03)	3,76 (+0,22)	3,76 (+0,16)	3,12 (+0,18)	2,70 (-0,18)	2,5 (-0,08)	3,00 (+0,18)
16. Hyundai	3,14 (+0,37)	3,82 (+0,28)	3,36 (-0,06)	2,93 (+0,03)	3,06 (-0,12)	3,19 (+0,19)	3,21 (+0,24)	2,86 (-0,63)	2,29 (-0,07)	2,85 (+0,54)	3,43 (+0,12)
17. Alfa Romeo	3,22 (+0,49)	3,86 (+0,26)	3,86 (+1,06)	2,90 (+0,10)	2,74 (+0,1)	2,90 (+0,04)	4,06 (+0,52)	3,52 (+0,12)	3,29 (+0,35)	3,25 (+0,21)	3,14 (+0,89)
18. Citroen	3,05 (+0,34)	3,50 (+0,39)	3,05 (+0,62)	2,57 (-0,05)	3,24 (-0,03)	3,40 (+0,04)	3,27 (-0,04)	3,93 (+0,50)	3,03 (+0,49)	3,76 (+0,96)	3,05 (+0,20)
19. Audi	3,17 (+0,69)	3,44 (+0,13)	2,63 (+0,34)	2,88 (+0,13)	2,68 (+0,15)	3,67 (+0,50)	3,38 (-0,13)	3,83 (+0,29)	2,58 (-0,50)	2,91 (+0,56)	3,00 (0)
20. Fiat	2,95 (+0,11)	3,46 (+0,14)	3,25 (+0,34)	2,83 (+0,06)	2,77 (+0,05)	2,75 (-0,22)	3,51 (-0,17)	3,81 (+0,17)	3,04 (-0,15)	3,34 (-0,06)	2,95 (-0,09)
21. Peugeot	2,92 (+0,56)	3,26 (+0,20)	2,67 (-0,33)	2,60 (+0,21)	3,00 (-0,42)	3,19 (+0,19)	3,33 (+0,10)	3,95 (+0,09)	3,14 (+0,10)	3,73 (+0,35)	3,00 (-0,38)
22. Renault	2,90 (+0,40)	3,13 (+0,28)	2,54 (+0,13)	2,29 (+0,02)	2,75 (+0,14)	3,00 (+0,36)	3,21 (+0,12)	4,07 (+0,05)	2,58 (-0,11)	3,32 (+0,08)	2,79 (+0,25)
23. Opel	2,77 (+0,15)	3,17 (-0,30)	2,65 (-0,03)	2,51 (-0,14)	2,72 (+0,20)	2,65 (-0,28)	2,99 (-0,24)	3,41 (-0,27)	2,47 (-0,30)	2,95 (-0,31)	2,82 (+0,12)
24. Chrysler	2,57 (-0,71)	2,93 (-0,65)	2,57 (-0,26)	2,71 (-0,62)	2,60 (+0,57)	3,00 (-0,18)	3,24 (+0,24)	3,43 (-0,13)	2,10 (-0,73)	2,64 (-0,65)	2,86 (-0,81)
25. Chevrolet	2,62 (-0,58)	3,07 (-0,48)	2,60 (+0,20)	2,33 (-0,63)	2,41 (+0,49)	2,40 (-0,83)	2,82 (-0,38)	2,31 (-0,46)	2,29 (-0,29)	2,77 (-0,40)	2,33 (-0,57)
26. Nissan	2,00 (-0,71)	2,88 (-0,27)	2,33 (-0,24)	1,61 (-1,01)	1,84 (+0,57)	2,56 (-0,40)	2,43 (-0,38)	3,08 (-0,11)	1,94 (-0,19)	2,31 (-0,62)	1,73 (-0,67)
<b>Average</b>	<b>3,24</b>	<b>3,62</b>	<b>3,21</b>	<b>3,02</b>	<b>3,14</b>	<b>3,34</b>	<b>3,47</b>	<b>3,53</b>	<b>2,84</b>	<b>3,12</b>	<b>3,26</b>

## General classification

Table 23.

Make	Mark	1.	2.	3.	4.	5.	6.	7.	8.	9.
1. Mercedes	4,12	3. (-1)	1. (+2)	2. (+1)	3. (+7)	8. (+9)	4. (+8)	2. (+12)	1. (+2)	2. (-1)
2. Volvo	4,07	2. (+1)	2. (0)	1. (0)	17. (-12)	15. (-8)	5. (0)	1. (0)	2. (-1)	3. (+1)
3. Ford	3,72	11. (+1)	4. (+10)	3. (+7)	10. (+7)	4. (+15)	10. (+4)	19. (+1)	12. (+1)	20. (-2)
4. Toyota	3,65	13. (-7)	12. (-4)	9. (+2)	12. (-8)	9. (-5)	11. (-10)	10. (+5)	3. (-1)	4. (-2)
5. SEAT	3,63	5. (+16)	5. (+8)	4. (+5)	4. (+10)	7. (+5)	6. (-6)	16. (-7)	9. (-4)	8. (-2)
6. Suzuki	3,62	7. (+4)	7. (+8)	6. (+1)	8. (+1)	12. (-2)	3. (+8)	8. (+14)	4. (0)	1. (+2)
7. Skoda	3,62	14. (-9)	11. (-4)	7. (-1)	11. (-4)	16. (-9)	14. (-4)	5. (+11)	6. (0)	7. (-2)
8. BMW	3,49	1. (0)	9. (-5)	10. (-8)	1. (+1)	3. (-1)	2. (+4)	7. (-5)	22. (-14)	25. (0)
9. Honda	3,46	10. (-1)	8. (+1)	15. (-2)	2. (+1)	1. (+6)	1. (+3)	21. (0)	19. (-9)	17. (-4)
10. Saab	3,45	17. (N)	6. (N)	14. (N)	16. (N)	13. (N)	15. (N)	3. (N)	7. (N)	5. (N)
11. SsangYong	3,42	9. (+1)	10. (-5)	8. (-4)	14. (-5)	14. (-6)	12. (+1)	4. (+3)	15. (+10)	23. (0)
12. Volkswagen	3,35	15. (-7)	19. (0)	11. (+7)	7. (+8)	10. (+3)	17. (-1)	14. (-10)	13. (-4)	9. (-1)
13. KIA	3,33	19. (-5)	15. (-5)	21. (+2)	13. (+4)	11. (-8)	7. (+1)	6. (-3)	17. (-6)	15. (+2)
14. Subaru	3,32	4. (0)	3. (-2)	24. (-8)	6. (-5)	6. (+1)	8. (+2)	20. (-15)	11. (+1)	6. (+6)
15. Mitsubishi	3,30	16. (+2)	18. (-7)	13. (-5)	15. (-3)	17. (-6)	13. (-5)	17. (+1)	8. (+9)	12. (+7)
16. Hyundai	3,30	6. (+18)	16. (-4)	22. (-1)	9. (+2)	5. (-5)	9. (-6)	18. (-5)	10. (+8)	16. (+5)
17. Alfa Romeo	3,28	26. (-3)	13. (+3)	5. (+10)	22. (+3)	19. (+6)	19. (+4)	9. (-3)	23. (0)	21. (+3)
18. Citroen	3,27	18. (+1)	21. (0)	18. (-1)	20. (-1)	18. (-3)	24. (0)	13. (-3)	5. (+2)	11. (-4)
19. Audi	3,25	8. (+5)	22. (-4)	16. (+4)	5. (+1)	2. (+14)	16. (+2)	22. (+2)	14. (0)	14. (+6)
20. Fiat	3,22	22. (-7)	17. (+3)	12. (0)	19. (+1)	20. (+3)	18. (+3)	12. (-4)	16. (0)	10. (+4)
21. Peugeot	3,11	12. (+10)	20. (+4)	19. (+6)	23. (-2)	21. (+1)	25. (0)	23. (-6)	20. (+2)	18. (-2)
22. Renault	2,99	24. (-8)	24. (-1)	23. (-1)	24. (-1)	23. (+1)	21. (+1)	11. (0)	18. (+3)	19. (+3)
23. Opel	2,96	21. (-4)	23. (-1)	20. (-1)	18. (-5)	22. (-4)	20. (-5)	15. (+4)	21. (-7)	13. (-4)
24. Chrysler	2,75	20. (-13)	14. (-8)	17. (-12)	25. (0)	25. (-5)	23. (-6)	26. (-1)	25. (-5)	24. (-9)
25. Chevrolet	2,52	25. (0)	25. (-8)	25. (-11)	26. (-4)	26. (-5)	26. (-7)	24. (-1)	24. (-5)	22. (-12)
26. Nissan	2,38	23. (-3)	26. (-1)	26. (-2)	21. (-6)	24. (-10)	22. (-2)	25. (-13)	26. (-1)	26. (-15)

Table 23 - cont.

Make	10.	11.	12.	13.	14.	15.	16.	17.	18.	19.	20.
1. Mercedes	1. (+1)	2. (0)	2. (+5)	2. (0)	2. (0)	2. (0)	4. (-3)	1. (0)	3. (+17)	1. (+1)	1. (+2)
2. Volvo	3. (+2)	5. (+2)	1. (+5)	1. (0)	1. (0)	1. (0)	1. (+2)	7. (0)	2. (-1)	2. (+5)	2. (-1)
3. Ford	6. (-4)	1. (+15)	5. (+8)	4. (+7)	3. (+5)	5. (+8)	5. (+13)	6. (+2)	1. (+5)	5. (+8)	6. (+5)
4. Toyota	4. (0)	4. (0)	18. (-13)	7. (-3)	8. (-3)	4. (+5)	2. (+2)	2. (+1)	8. (+9)	6. (-3)	9. (-4)
5. SEAT	9. (-3)	7. (-2)	7. (-3)	3. (+10)	7. (0)	7. (+1)	8. (0)	18. (+2)	9. (-6)	11. (+3)	10. (0)
6. Suzuki	2. (+6)	20. (-1)	20. (+3)	9. (+5)	12. (-3)	8. (-1)	7. (+3)	13. (+4)	11. (+12)	15. (+6)	4. (+8)
7. Skoda	8. (+3)	3. (+8)	6. (+6)	8. (-1)	4. (+2)	3. (+2)	9. (+2)	12. (-2)	4. (-2)	9. (-5)	7. (+2)
8. BMW	18. (-17)	19. (-18)	8. (-7)	13. (-10)	9. (-5)	11. (-8)	10. (-8)	14. (-11)	17. (-1)	7. (-6)	3. (-1)
9. Honda	11. (-1)	12. (-6)	17. (-8)	11. (+1)	18. (-4)	17. (-7)	15. (-6)	3. (+2)	5. (0)	22. (-4)	8. (0)
10. Saab	5. (N)	6. (N)	12. (N)	6. (N)	5. (N)	14. (N)	23. (N)	21. (N)	14. (N)	21. (N)	12. (N)
11. SsangYong	17. (-2)	15. (+8)	4. (+11)	5. (+3)	6. (+5)	12. (-6)	14. (-8)	20. (+1)	16. (-13)	23. (0)	5. (+1)
12. Volkswagen	16. (0)	8. (+7)	9. (-1)	14. (+3)	13. (+3)	18. (-6)	13. (+3)	9. (-1)	13. (-5)	19. (-8)	16. (0)
13. KIA	10. (-1)	14. (-6)	11. (0)	12. (-2)	11. (+1)	10. (-6)	12. (-7)	24. (0)	20. (-8)	13. (+4)	13. (+1)
14. Subaru	7. (+8)	10. (-7)	14. (-12)	10. (-5)	14. (-11)	25. (-1)	18. (+5)	25. (0)	24. (1)	14. (+11)	14. (-10)
15. Mitsubishi	13. (-6)	13. (+7)	10. (0)	15. (-6)	15. (0)	6. (+5)	6. (+6)	19. (+3)	15. (-2)	25. (-5)	18. (+2)
16. Hyundai	15. (+3)	11. (+2)	13. (-10)	16. (0)	16. (+1)	15. (+3)	21. (+3)	23. (-8)	23. (-1)	18. (+6)	11. (+4)
17. Alfa Romeo	12. (+7)	9. (0)	3. (+15)	17. (+1)	21. (0)	21. (+2)	3. (+10)	15. (+2)	6. (+5)	12. (+3)	15. (+10)
18. Citroen	19. (+2)	16. (+6)	16. (+5)	22. (+1)	10. (0)	13. (+1)	19. (-4)	8. (+8)	12. (+9)	3. (+16)	17. (+4)
19. Audi	14. (+10)	18. (0)	22. (+3)	18. (+2)	23. (-1)	9. (+8)	16. (-2)	10. (+4)	19. (-10)	17. (+5)	19. (-1)
20. Fiat	20. (-3)	17. (0)	15. (+1)	19. (0)	19. (+4)	22. (-2)	11. (-4)	11. (+1)	10. (-3)	8. (-3)	21. (-4)
21. Peugeot	21. (+4)	21. (+3)	19. (-6)	21. (+3)	17. (+7)	16. (+3)	17. (0)	5. (+3)	7. (+3)	4. (+2)	20. (-5)
22. Renault	22. (+1)	23. (+2)	25. (-2)	25. (0)	20. (0)	20. (+6)	22. (-1)	4. (-1)	18. (0)	10. (0)	24. (-1)
23. Opel	23. (-1)	22. (-8)	21. (-2)	23. (-2)	22. (-4)	23. (-1)	24. (-5)	17. (-6)	21. (-5)	16. (-7)	23. (-4)
24. Chrysler	25. (-13)	25. (-15)	24. (-7)	20. (-14)	24. (-11)	19. (-4)	20. (+2)	16. (-3)	25. (-11)	24. (-16)	22. (-15)
25. Chevrolet	24. (-11)	24. (-12)	23. (+1)	24. (-9)	25. (-6)	26. (-11)	25. (-5)	26. (-3)	22. (-3)	20. (-8)	25. (-5)
26. Nissan	26. (-6)	26. (-5)	26. (-6)	26. (-4)	26. (-1)	24. (-3)	26. (-1)	22. (-2)	26. (-2)	26. (-10)	26. (-2)

The dealers were also asked about the most desirable dealer authorization. Every 3rd dealer would choose its own make again, which means a 3% increase compared to last year. It is also worth noting that all BMW dealers who participated in the study were determined to stay in their network.

The most desired authorization among Polish dealers was Toyota.

It is good to see that, compared to the previous year, over 50% fewer dealers chose to 'ignore' the question about the desired make or said that if they could do it all over again, they would not have invested their money in a dealership. Below we present the percentage of dealers of individual makes who would not decide to invest in the dealership again.

The next edition of the dealer satisfaction study will be held in Poland in September and October 2009.

**Chart 1. Percentage of dealers who would choose their make again (■ - 2007, ■ - 2008)**

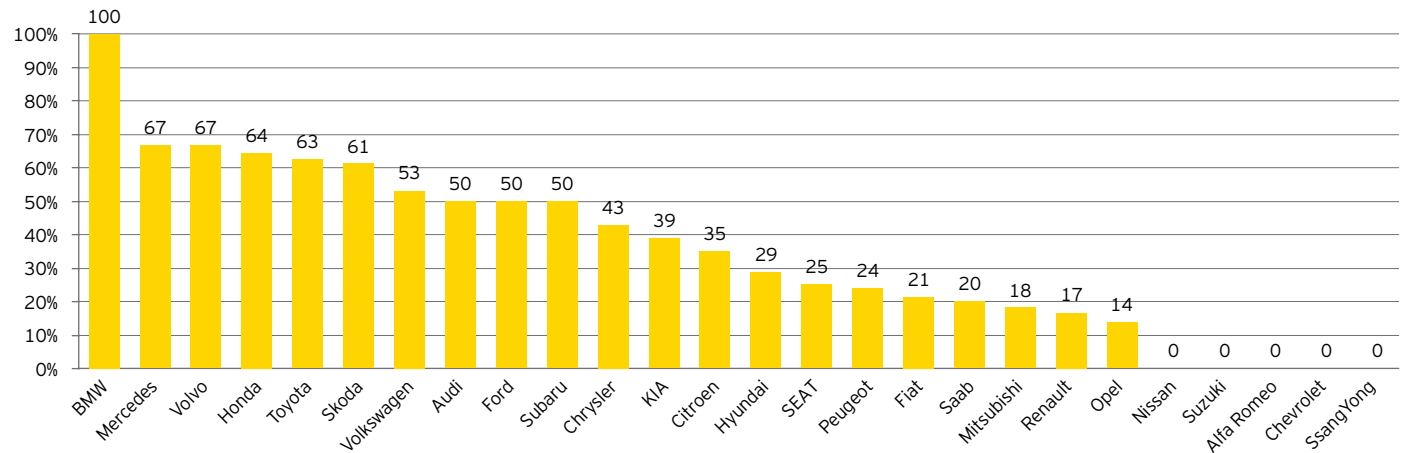
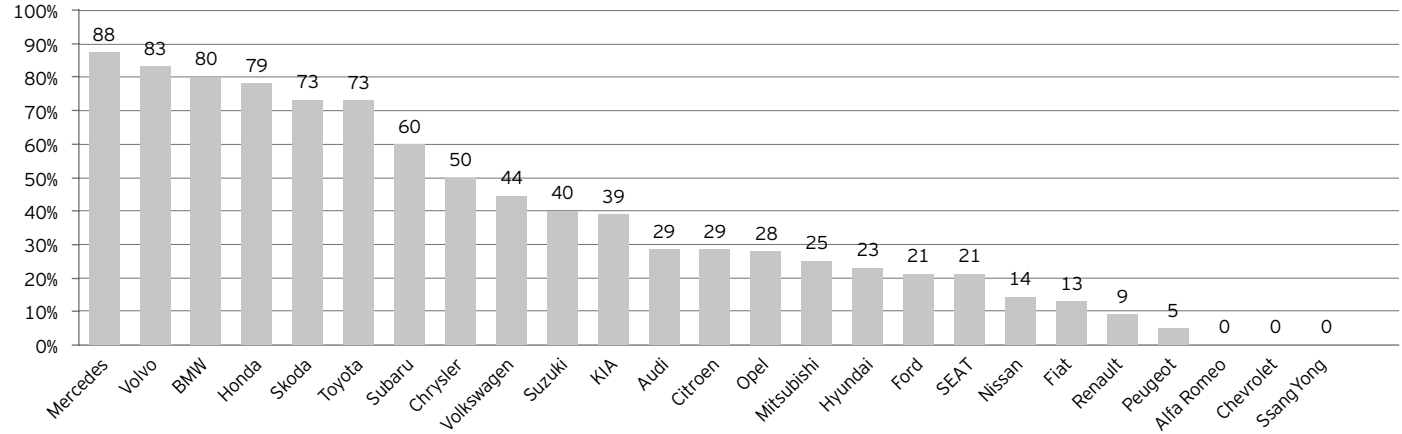
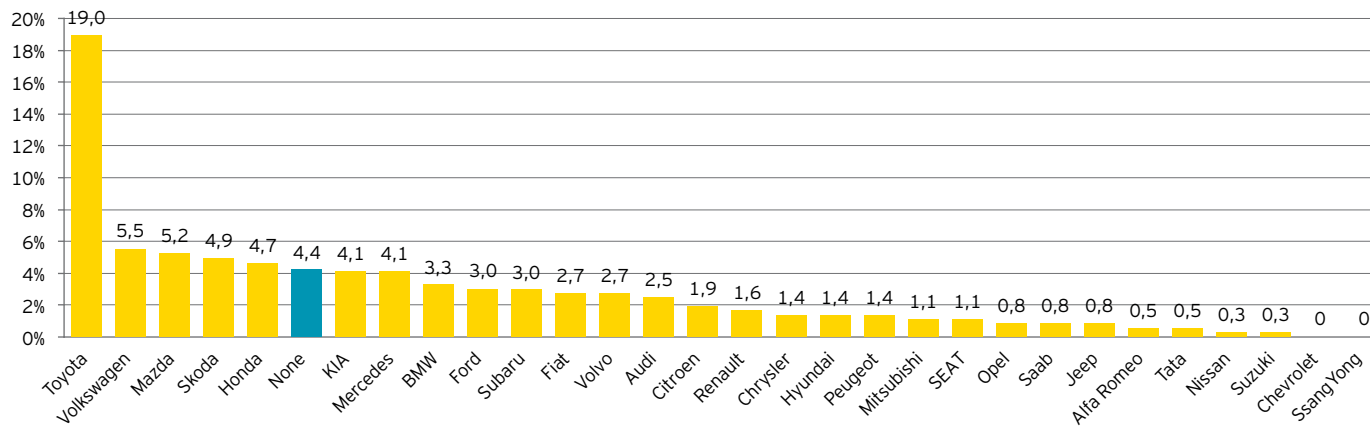
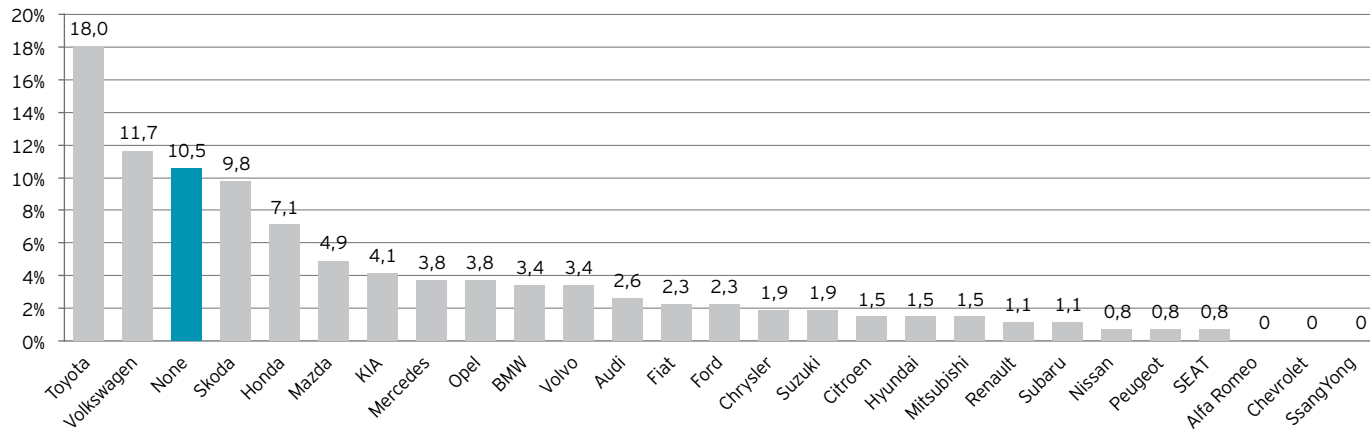
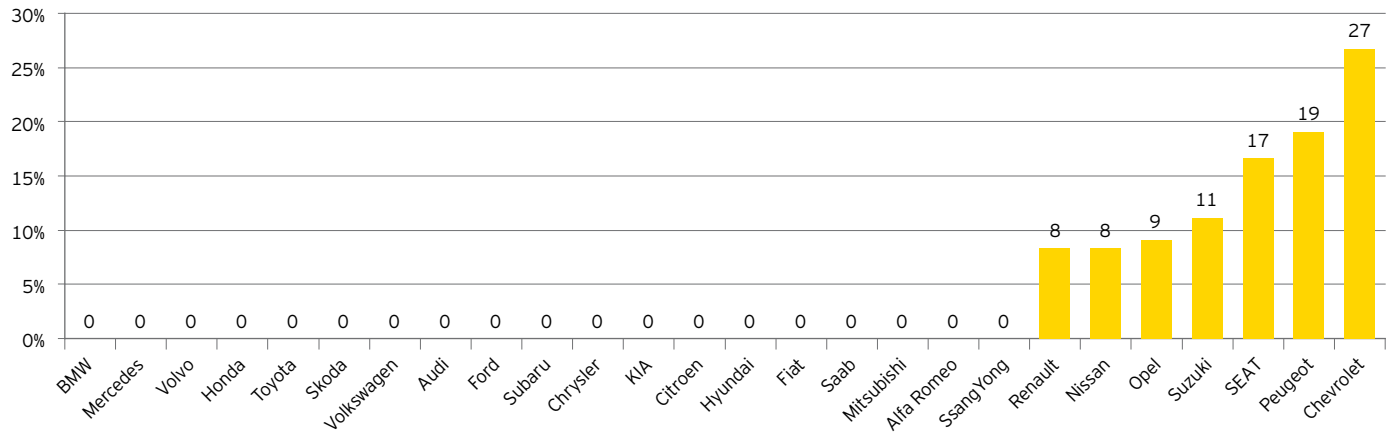
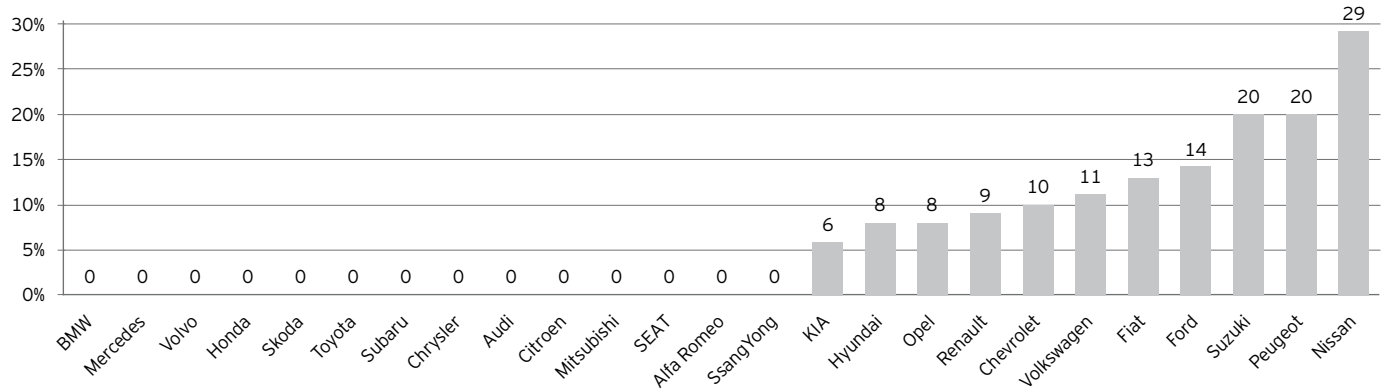


Chart 2. If I had a second chance, I would choose to be the dealer of... (■ - 2007, ■ - 2008)





**Chart 3. Percentage of dealers of individual makes who would not decide to open a dealership again (■ - 2007, ■ - 2008)**





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