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News Release

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Not all vehicle owners are equal

BRYANSTON – As we all know, the South African motoring public is far from a uniform group of consumers. Given the number of languages, cultures, races and age groups in the market, this is hardly surprising. Based on our traditional view of people one could well expect that a 21-year old Afrikaans female may have different vehicle preferences to a 45-year old Xhosa male.

While different languages, races, genders and ages may play a part in the discrepancies between consumers, these differences also come from vastly different attitudes towards motor vehicles, and the behaviours and expectations that go hand-in-hand with these attitudes. While one person may regard their vehicle as their prize possession, another may only regard it as a necessary evil.

According to the Synovate Competitive Customer Satisfaction Index (CCSI), a syndicated survey of more than 55 000 vehicle owners per year, vehicle owners can be segmented into different *profiles*. Depending on the profile of each consumer, preferences vary about: the type of car purchased; the level of satisfaction with the sales and service process; and the quality expectations of the vehicle owner.

What are these profiles?

The majority of vehicles in the passenger vehicle market are sold to those vehicle owners who are profiled as **traditionalists** (29%). This group is has a relatively conservative outlook on life and like to “fit in with the crowd”. The rest of the market is made up of **family-focused** vehicle owners (26%) - those who base decisions on family needs and spaciousness. **Trendsetters** make up 18% of the market – these are the status drivers and will spend a lot of money to create the right image. They just have to be in the 'latest and the greatest'. **Enthusiasts,** who just love cars and the experience of driving make up 15% of the passenger vehicle market, while the last group, **A-to-Bers** (12%) really does not care about the type of car they drive as long as it does its job.

Which group is the easiest to please?

Traditionalists are certainly the most forgiving when it comes to service levels. On average, they rate satisfaction with the sales and service processes much higher than the rest of the groups.

These drivers are often described as 'typical South Africans'. Married with a couple of kids, 40-50 years of age, love sport, enjoy a beer (or a glass of wine), probably goes to church quite regularly and have a relatively conservative outlook on life.

"Fitting in with the crowd" is very important to them and they would rather buy a vehicle that is well-known and driven by many. They don't like to stand out or be noticed because of their car. Brands with a large dealer network go a long way in winning this group over – they like to know that they will be close to a dealer should anything go wrong with the car and urgently need attention.

Traditionalists are least involved with their cars – in 40% more cases than the average, this group of people they do not know whether their vehicles have a service plan. They are also the easiest to please when it comes to value for money and rate this aspect 7% higher than any of the other consumer profile groups.

Traditionalists notice fewer problems and are more tolerant. Scores given by this group suggest that their vehicles are fixed correctly the first time more often than the rest (a substantial 8% higher score). Traditionalists also seem to form a better relationship with their salesperson and rate them higher than the average vehicle owner.

Hardest to please?

On average, **A-to-Bers** rate satisfaction with the sales and service processes lowest amongst the rest of vehicle owners in the market. What makes this group so fussy?

When looking at some of the behaviour and attitudes demonstrated by this group, it is surprising that this group does not really care about the kind of car they drive. The car is a means to get from A to B and is chosen simply because it was the model that offered the highest specification for the purchaser's budget . They care about Rands and Cents instead of the brand or model they drive.

A-to-Bers prefer to arrange their own financing instead of allowing the dealer to do it – perhaps because this allows tighter control over their budget and finances to ensure that they are getting the best value for money at every stage.

A to Bers are also considerably less convinced that the package they were offered is value for money. 83% of A to Bers believe that the overall package was value for money, compared to the average of 87%. For them, even buying a vehicle is a grudge purchase where all the profiles enjoy the purchasing process

This perhaps explains why A-to-Bers are so critical with the sales and service process. They notice more problems with the vehicle after delivery and after the service and are less forgiving when dealers don't fulfil their promises – they feel as though they are not getting enough value for their money.

For more information on the various profiles in the vehicle market, please contact richard.rice@synovate.com

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About Synovate's CCSI

The Synovate CCSI is the largest survey in the South African automotive market – the Synovate Competitive Customer Satisfaction Index (CCSI) where over 55 000 vehicle owners are canvassed on issues such sales satisfaction, service satisfaction, product quality, brand image and customer behaviour. The results of this part of the survey reflect the opinions of 28 000 vehicle owners, making it the most reliable survey of its kind in South Africa.

These results feed the annual Synovate Quality Awards.

About Synovate

Synovate, the market research arm of Aegis Group plc, generates consumer insights that drive competitive marketing solutions. The network provides clients cohesive global support and a comprehensive suite of research solutions. Synovate employs over 5,500 staff in 50 countries.

More information on Synovate can be found at www.synovate.com and www.synovate.co.za