

Synovate Quality Awards - Sales & Service 2004

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Synovate releases the South African motor industry's latest Customer Satisfaction Research results.

BMW's dealers have topped Audi and Toyota offering the best after-sales and service experience. This is according to the latest results released by global market research company Synovate, as part of their annual Quality Awards based on the Competitive Customer Satisfaction Index (CCSI) of the South African automotive industry.

BMW was in first position with 81.5%, followed by Audi (79.4%) and Toyota (79.2%) in second and third position respectively. These three brands retained the same rankings they achieved during the previous survey in 2003.

The LCV race was closely contested between all the brands, but was eventually topped by Nissan (79.4%).

When it came to customer satisfaction when buying a new car, Chrysler/ Jeep beat Mercedes-Benz and Toyota to the top slot.

On the Light Commercial Vehicle (LCV) side, Toyota and Mitsubishi led the race. Nissan showed the most improvement in this segment.

"Once again, the South African automotive industry has demonstrated their commitment to the highest levels of customer satisfaction," said Albert McLean, managing director of Synovate South Africa. "Our company has been measuring customer satisfaction for more than 15 years in the South African motoring environment, and has found that South African automotive dealers have become some of the most sophisticated users of customer satisfaction research in the world."

Synovate introduced a questionnaire change in the beginning of 2004 and the changes reflected dramatic shifts in customer expectations. "New elements of service delivery were added to the questionnaire in response to changing customer requirements, and in turn created new demands on automotive manufacturers and their dealer networks as customers became increasingly discerning," said McLean.

"Altogether it is an outstanding performance from the industry given the intense competition and focus on customer satisfaction" says McLean. "Not only was the industry able to kick their performance up a gear in response to new and higher expectations, they were able to do this in a relatively short space of time."

"An interesting aspect of the results is that there is now virtual parity between the Passenger Car and LCV scores. This has been driven by some of the brands that have light commercial vehicle owners as a large part of their customer base and demonstrates that 'bakkie' owners now enjoy the same level of service as their passenger car counterparts," said McLean.

This research forms part of the largest survey in the South African automotive market - the Synovate Competitive Customer Satisfaction Index (CCSI) where over 50 000 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 in the country.

"The market leading methodology used during this research has been developed in partnership with the local automotive manufacturers and we are therefore able to deliver rapid and detailed feedback to dealers and manufacturers. This establishes a reliable platform for the improvement of service delivery. All of which is of ultimate benefit to the customer," said McLean.

"During the research that was conducted it became obvious customers were not willing to compromise on any aspect of service. The dealer cannot, therefore, afford to drop their service levels at any time during a transaction," said McLean. "Not only do they understand, very clearly, the impact that poor service delivery has on their business, but they are able to react very quickly to changes in the market place and in customer demands."

The Synovate Quality Awards and CCSI results are endorsed by the Department of Trade and Industry (the dti). "The support of the dti has been invaluable and their decision to endorse the results was based on the value that such transparency will have in driving competitiveness and improved customer service delivery in the South African market," said McLean.

Customers are contacted telephonically shortly after either a sales or service experience and are asked questions relating to a variety of aspects of service delivery from the dealer. "The questions that we ask are all thoroughly researched with actual customers. This means that we are measuring what is crucial to the customer and not simply aspects that the manufacturers consider to be important," said McLean.

"In addition, we have not fallen into the trap of assuming that one size fits all and the questionnaire is based on South African customers and South African expectations."

SYNOVATE CUSTOMER SATISFACTION RESEARCH IN THE SA MOTOR INDUSTRY

FULL RESULTS OF THE SYNOVATE QUALITY AWARDS 2004

A.

Customer Satisfaction when Purchasing a New Passenger Vehicle (January 2004 - December 2004)

| Position | Brand | Score | Synovate Medal |
|-----------------|----------------|--------------|-----------------------|
| 1. | Chrysler/ Jeep | 93.1 | Gold |
| 2. | Mercedes-Benz | 92.7 | Gold |
| 3. | Toyota | 91.3 | Gold |
| 4. | Mitsubishi | 90.9 | Gold |
| 5. | Audi | 90.7 | Silver |
| 6. | BMW | 90.5 | Silver |
| 7. | Volvo | 90.1 | Silver |
| 8. | Ford | 90.0 | Silver |
| 9. | Nissan | 89.8 | Silver |
| 10. | MINI | 89.3 | Silver |
| 10. | VW | 89.3 | Silver |
| 10. | Opel | 89.3 | Silver |
| 11. | Land Rover | 88.5 | Bronze |
| 12. | Mazda | 88.4 | Bronze |
| 13. | Renault | 86.9 | Bronze |
| 14. | Fiat | 86.7 | Bronze |

B.

Customer Satisfaction when Servicing a Passenger Vehicle (January 2004 - December 2004)

| Position | Brand | Score | Synovate Medal |
|-----------------|--------------|--------------|-----------------------|
|-----------------|--------------|--------------|-----------------------|

| | | | |
|-----|---------------|------|--------|
| 1. | BMW | 81.5 | Gold |
| 2. | Audi | 79.4 | Gold |
| 3. | Toyota | 79.2 | Gold |
| 4. | Mazda | 78.6 | Silver |
| 5. | Nissan | 78.5 | Silver |
| 6. | Mercedes-Benz | 78.1 | Silver |
| 7. | VW | 77.7 | Silver |
| 8. | Fiat | 77.6 | Silver |
| 9. | Volvo | 77.2 | Silver |
| 10. | Ford | 76.7 | Silver |
| 10. | Opel | 75.7 | Silver |
| 10. | Renault | 75.1 | Bronze |
| 11. | Land Rover | 71.3 | |
| 12. | Alfa | 65.6 | |

C.
Customer Satisfaction when Purchasing a New Light Commercial Vehicle
(January 2004 - December 2004)

| <i>Position</i> | <i>Brand</i> | <i>Score</i> | <i>Synovate Medal</i> |
|------------------------|---------------------|---------------------|------------------------------|
| 1. | Toyota | 90.8 | Gold |
| 2. | Mitsubishi | 90.7 | Gold |
| 3. | Nissan | 88.7 | Silver |
| 4. | Isuzu | 87.5 | Silver |
| 5. | Ford | 87.1 | Silver |
| 6. | Mazda | 86.3 | Silver |

D.
Customer Satisfaction when Servicing a New Light Commercial Vehicle
(January 2004 - December 2004)

| <i>Position</i> | <i>Brand</i> | <i>Score</i> | <i>Synovate Medal</i> |
|------------------------|---------------------|---------------------|------------------------------|
| 1. | Nissan | 79.4 | Gold |
| 2. | Toyota | 79.0 | Gold |
| 3. | Mitsubishi | 78.9 | Gold |
| 4. | Isuzu | 78.4 | Gold |
| 5. | Ford | 77.8 | Gold |
| 6. | Mazda | 76.7 | Gold |

BACKGROUND TO THE RESEARCH

The Synovate Competitive Customer Satisfaction Index (CCSI) includes separate measurements of customer satisfaction when purchasing or servicing a vehicle. The results are grouped into Passenger Vehicles and Light Commercial Vehicles to allow for direct comparisons to be made.

Synovate introduced a questionnaire change in the beginning of 2004 and the changes reflected dramatic shifts in customer expectations. "New elements of service delivery were added to the questionnaire in response to changing customer requirements, and in turn created new demands on automotive manufacturers and their dealer networks as

customers became increasingly discerning," said Albert McLean, managing director of Synovate South Africa.

"One significant change to the rankings has been that we now account for statistical significance and have introduced a 'medal' system whereby brands are grouped together based on the precision of the scores. Individual brands are competing for Synovate Gold, Synovate Silver and Synovate Bronze," said McLean.

"The awards have become benchmarks of service delivery in a variety of industries in South Africa. Many stakeholders have welcomed the transparency that these awards created when they were launched with the publication of the Synovate Vehicle Quality research results towards the end of last year."

The Synovate CCSI results are endorsed by the Department of Trade and Industry (the dti). "The support of the dti has been invaluable and their decision to endorse the results was based on the value that such transparency will have in driving competitiveness and improved customer service delivery in the South African market," said McLean.

Synovate South Africa now forms part of a global research company and thus has access to advanced research methods from around the world. "The market leading methodology used during this research has been developed in partnership with the local automotive manufacturers and we are therefore able to deliver rapid and detailed feedback to dealers and manufacturers. This establishes a reliable platform for the improvement of service delivery. All of which is of ultimate benefit to the customer," said McLean.

"We measure customer satisfaction in a number of industries and have recently published results including municipalities, long term insurance, medical aids, banking and telecommunications as part of the South African Satisfaction Index (SAS Index). With SAS Index, we are able to compare our industries to their counterparts on other continents and our performance is improving constantly."

Customers are contacted telephonically shortly after either a sales or service experience and are asked questions relating to a variety of aspects of service delivery from the dealer.

"The questions that we ask are all thoroughly researched with actual customers. This means that we are measuring what is crucial to the customer and not simply aspects that the manufacturers consider to be important," says McLean. "In addition, we have not fallen into the trap of assuming that one size fits all and the questionnaire is based on South African customers and South African expectations unlike other surveys in our market."

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