

# The values that drive car choice

If an auto brand can identify consumers' Ideal Automobile, its high-contribution values, and the expectations consumers hold for it, marketers will have a head start in the race for brand engagement. **Robert Passikoff** of **Brand Keys** explains how predictive metrics can identify the changing ideals that consumers expect from their car

It was Eddie Rickenbacker, fighter ace, race car driver and automotive designer, who first postulated the production of a flying car in a 1924 *Popular Science* piece entitled 'Flying autos in 20 years'. The article set the foundation for consumer expectations for something more than the then best-selling car, the Ford Model T, a car customers could have in any colour, so long as it was black.

Twenty years went by. Expectations of a flying car went unmet. More important values shaped consumers' expectations – larger vehicles in colours other than black. By then, sixty-two colours were available. Flying car expectations were supercharged in 1962 – as Baby Boomers were applying for driving licences – with the release of an animated, space-age sitcom called *The Jetsons*, where flying cars were de rigueur.

But by the 1980s, consumers had more important values than flying in mind, namely safety, emissions, and fuel economy. Within that decade, the industry had increased mpg by 45%. Seatbelts were law. Engines were re-engineered to reduce CO<sub>2</sub> and hydrocarbons, these changes emblematic of expectations brands had to meet to engage customers. All consumer desires could be succinctly expressed as the 'Ideal Car', also true today, just a little more difficult to measure.

The Ideal elucidates a category's four path-to-purchase drivers, describing how consumers will view the category, compare brands in the category, and how they will engage, buy and remain loyal to the brand. Each driver is made up of sets of emotional and rational values. Identifying the Ideal has proven to be the best roadmap to successful strategies, tactics, features, and advertising that will best engage customers.

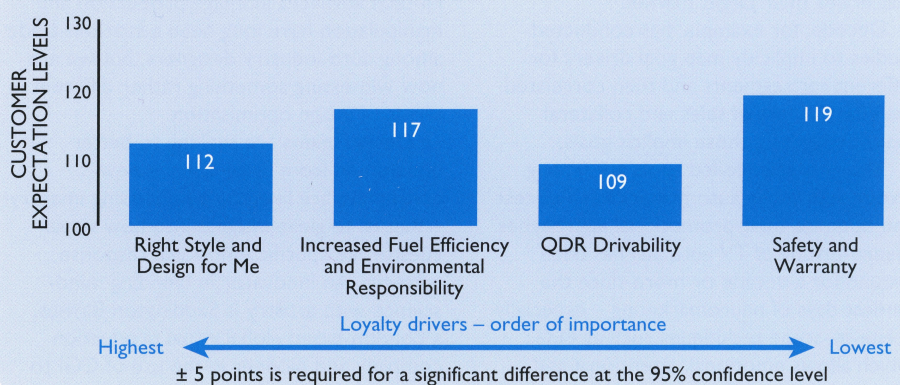
Consumers hold differing expectations for different path-to-purchase drivers of the Ideal. One driver can be more important than another, but a less important driver can be where consumers hold the highest expectations. Automotive Style has been the top most important category driver for a while, but Safety and Warranty (consistently fourth most important) is where consumers have held high expectations. It doesn't matter how a car looks if it can't protect your family.

The concept of brand engagement is straightforward. Consumers have an Ideal for everything: it's the yardstick they use to measure brands. Defining your Ideal is where it gets tricky. Marketers look at their category through a brand lens, consumers through a category lens. That dichotomy can create problems for marketers seeking engagement. Drivers (and their component values) are category-specific. Consumers don't buy automobiles the same way they buy allergy medicines.

To engage accurately and successfully, you need nuanced, psychological metrics because today's consumers do not behave as they say, do not say what they really think, and do not think what they really feel. Consumers talk to themselves before they talk to brands. The result? Usually, massive gaps between what people really want and what brands deliver. And confusion among marketers about what drives brand engagement. The Ideal is not static, changing only according to how consumer values for the category change. If identified properly, those changes are predictive of where the category will be three to five years down the road.

The process consumers go through to create their Ideal is more emotional than rational, so defining the Ideal and identifying what consumers expect from their Ideal has to be more penetrating than ten-point scales. If an automotive brand can correctly identify the Ideal, its high-contribution values, and the expectations consumers hold for them,

FIGURE 1: IDEAL AUTOMOBILE: 1992



marketers will have a head start in the race for brand engagement.

To identify the Ideal, Brand Keys uses an independently validated research approach that fuses emotional and rational aspects of the categories, identifies the four behavioural path-to-purchase drivers for the category-specific Ideal, and identifies the values that form the components of each driver. A driver name represents the high-contribution values that comprise it.

Expectation levels are expressed as index numbers (to facilitate driver-to-driver comparisons) and are configured against a category benchmark of 100. These assessments allow marketers to measure how well their brands meet consumer expectations for each driver that defines the Ideal.

The research technique, a combination of psychological inquiry and higher-order statistical analyses, has a test/retest reliability of 0.93, accounts for 96% of the category variance, and provides results generalisable at the 95% confidence level. It has been successfully used in B2B and B2C categories in thirty-five countries including the Automotive Category.

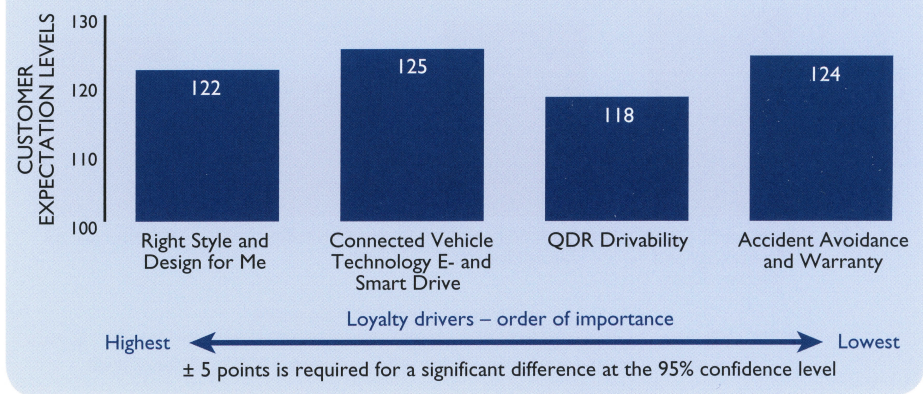
What follows are configurations of the automotive Ideals identified in the Brand Keys Customer Loyalty Engagement Index in 1992, 2010, and 2017, predictive metrics identifying highways to brand engagement, based on delivering what consumers really expected from their Ideal Automobile.

1992

In 1992, values that made up 'The Right Style and Design' driver became more personal, and the first most important driver of the Ideal was renamed 'Right Style and Design for Me' (Figure 1).

The 1991 category driver 'Fuel Efficiency' (then the third most important) shifted in import and became 'Increased Fuel Efficiency and Environmental Responsibility', with expectations that increased significantly (110 to 117), reflecting consumer concerns pertaining to reports, films, and weather events regarding global warming and the effects of automobiles. 'Quality, Durability, Reliability, and Drivability' shifted from second to third most important, with no increase in

FIGURE 2: IDEAL AUTOMOBILE: 2010



expectations. 'Safety and Warranty' remained fourth most important, with the high expectation levels it had always shown.

The shifts in driver importance, value composition, and expectation levels were harbingers of what the automobile public really wanted: cars that were fuel-efficient and not detrimental to the environment. Consumers wanted to feel environmentally responsible, and their automotive brand selection would reflect their concern for, and participation in, the world around them.

If automotive brands were aware of such changes in consumer expectations, they did not rush to address those particular values. One can only presume that automotive manufacturers considered them unwarranted since petrol was so inexpensive. But engaging consumers and meeting their expectations always correlates with consumer behaviour and 1992 sales of autos and trucks were down by 2% year on year.

Dramatic increases in the cost of petroleum finally drove auto makers to hybrids, now a core segment of the automotive market of the future. Nearly 12 million hybrid vehicles have been sold since the inception of the 1997 Toyota Prius. What might a five-year lead of insights into what consumers actually expected have provided a perspicacious brand?

2010

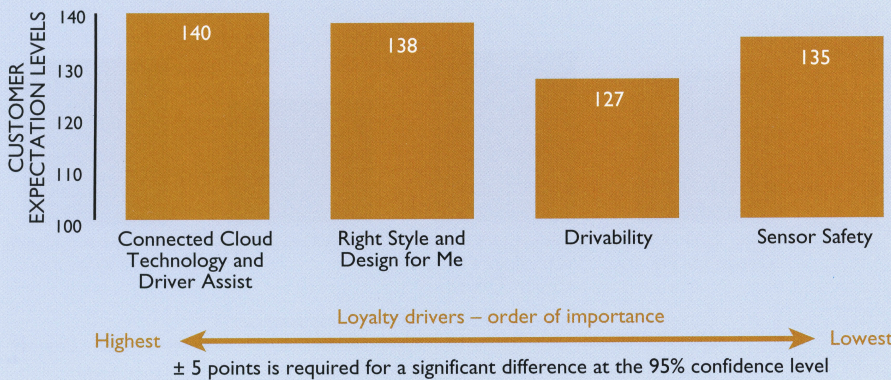
To identify a meaningful Ideal, that Ideal must be category-specific with category

value components that are also category-specific. But consumers do not live in category bubbles. Interaction with the world at large affects how consumers look at all categories in their lives and what they value and expect. A value shift in one category can make itself felt in another. Amazon's two-day delivery policy ultimately became the expected paradigm for delivery in virtually all categories. If one category can compress delivery time, why shouldn't others? Washing machines were the first category to use voice commands; now we have Amazon's Alexa.

It's hard to imagine a time without modern-day technology. Consumers are born hot-wired to the internet, online-issued birth certificates and smartphones. It was only a decade ago that Apple introduced the first iPhone, but tech time moves faster than calendar time, and values – especially emotional values – move at the speed of the consumer. Technology has made itself felt virtually everywhere, not least in the automotive category. By 2010, consumers had dramatically 'redesigned' their Ideal Automobile (Figure 2).

While 'Right Style and Design for Me' was still the top most important driver, expectations had increased radically. This paralleled shifts in consumer values in other categories, where expectations to be 'unique' and to 'personalise' product interactions had appeared and morphed spectacularly.

The specific values related to fuel efficiency found a new home in the 'QDR Drivability' driver, so although these values were still

**FIGURE 3: IDEAL AUTOMOBILE: 2017**

expected, they were just seen as a more basic component of another driver, which saw significantly increased expectations.

But analysis of the Ideal identified a new Ideal category driver with very high expectations, which we called 'Connected Vehicle Technology E- and Smart Drive', reflecting consumers' ever-increasing expectation of connection wherever they were. They did not expect to be tethered, demanding a 24/7 Everywhere connection. They expected personal and behavioural data would transform into something that improved their experience with their car.

This showed up in the former 'Safety and Warranty' driver, which, via consumer expectations, transformed into 'Accident Avoidance and Warranty'. It was no longer just a question of safety. Consumers expected (at significantly higher levels) that their Ideal car would include a system that would help avoid or mitigate accidents, a feature Ford ultimately introduced into the North American market in December 2013.

## 2017

Figure 3 shows what the 2017 Automotive Ideal, identified in the Brand Keys Customer Loyalty Engagement Index, looks like. The 'Right Style and Design for Me' driver continues to reflect high expectations, but has shifted from first to second most important category driver for the Ideal Car.

International auto shows and Jetson-like concept cars notwithstanding, aerodynamic

engineering in aid of drag reduction, wind noise, fuel efficiency, and impact standards have made nearly all cars indistinguishable from one another. But expectations regarding style have skyrocketed, which will necessitate brands ultimately meeting the expectations of the Ideal. Brands will eventually redesign cars to offer more personalised, customisable bodies and interiors, much the same way they redesigned luggage space to better meet consumers' lifestyle expectations.

The top most important driver of the Ideal is now called 'Connected Cloud Technology and Driver Assist', exhibiting the highest expectations for the Ideal. Chevrolet offers a 4G LTE Hotspot, but connection and apps will soon become ubiquitous. Consumers now expect such functions as lane maintain, self-braking, adaptive cruise control, and cloud-based access to music, information, and outreach via voice command.

QDR (Quality, Durability and Reliability) is price-of-entry in the category, and these elements have become components of the third driver of the Ideal, now simply called 'Drivability' – the ease (and enjoyment) of the drive, which also includes aspects of autonomous driving, although that value currently appears at lower levels of influence than news stories and Google might have one think.

Warranties are also given and now safety aspects of the Ideal have become 'Sensor Safety', reflecting an expectation for automatic crash prevention, parking/driving sensors, programmed blind-spot ID

and, to a lesser degree, vehicle-to-vehicle communication.

Consumer expectations always grow. Being attentive to the engagement expectation gap presents brands with real opportunities.

In the automotive category, expectations have increased 28% during 2016. Brands have only kept up with that by 4%, leaving an enormous gap between what consumers really expect (and buy) and what brands are seen to deliver. Incorporating the Ideal into an automotive brand's research toolbox allows a brand to stay ahead of the zeitgeist curve, innovating and shaping the automotive brand's own category, while simultaneously engaging more consumers.

With apologies to Messrs Rickenbacker and Jetson, flying cars may be a punch line about technological gains and the future, but it's a great example of how measuring an emotionally based category Ideal can identify what consumers really expect – as opposed to what they say they expect.

Soaring customer expectations have created a challenging environment for automotive brands seeking engagement. Automotive marketers need to address important and differentiating values, and do it before those values turn into category-value commodities. Brands that better meet customer expectations and address them via meaningful emotional values will always see more highly engaged customers behaving better towards them, which translates into market shares and profits.

All marketers need is an accurate answer to these questions: What does the Ideal Automobile look like? What do my customers expect about what drives category engagement? And what values best fulfil those expectations? Get answers before the competition and you'll have an in-market advantage – the bottom line benefit about leveraging the right values against customer expectations.

But first, you actually have to be able to accurately identify them, which, when it comes to automotive research and strategic planning, is the ultimate bottom line.

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