



# A Toyota Case Study

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How to find 'floating' customers

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## How to find ‘floating’ consumers

Those of us interested in politics have long understood the importance of floating voters – that small but crucial group who change their votes from one election to the next. Understanding exactly who they are and what drives them is vital for parties and politicians seeking election; who can forget Essex man or Worcester woman – attempts by the parties and the media to hone in on the small numbers of people who will determine an election result.

As with politics so for business. Marketing budgets are aimed at getting consumers to do something differently – make them aware of you, change their views on you, alter their behaviours towards you i.e start buying, spend more etc. But only a small proportion of consumers are in the market to do something differently; they won’t all change their minds. Identifying who those ‘floating consumers’ are, how to target them and how to message them can massively improve marketing effectiveness and return on investment.

Historically it has not been easy to identify the floating consumers. Traditional survey methods fall down because it is difficult for respondents to accurately recall how they have changed – false recall is a well documented problem for political polling; even remembering a seemingly important such as who you voted for behaviour is hard, imagine how much harder that becomes when we ask people how they previously viewed a washing powder.

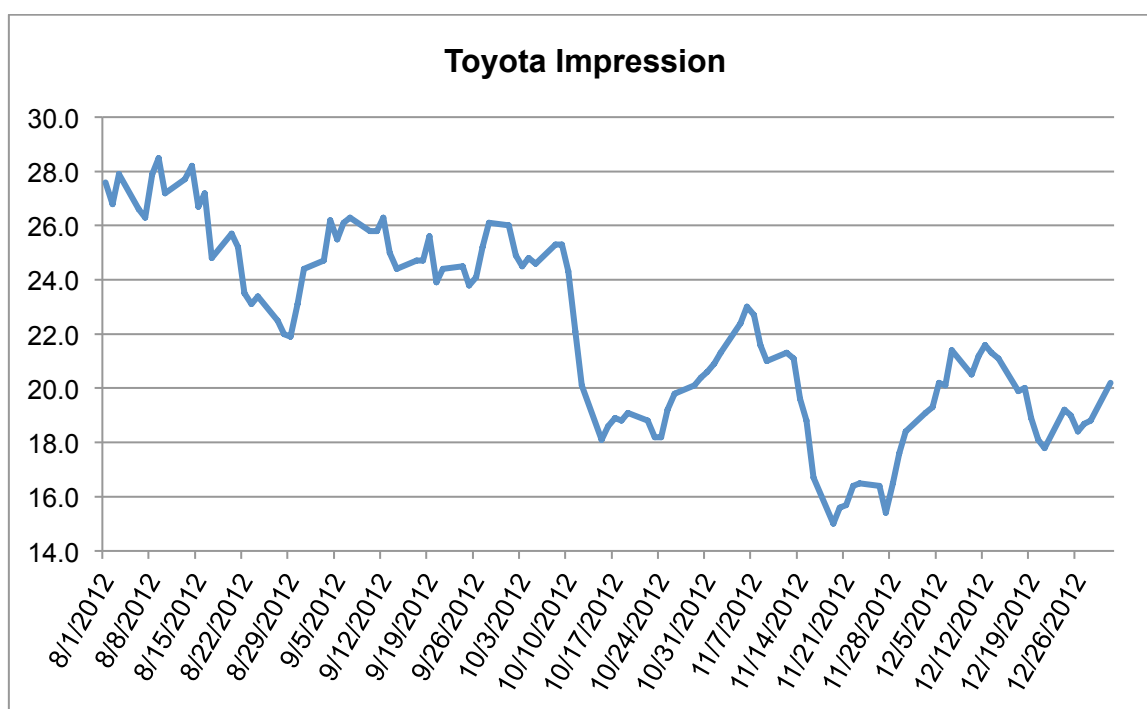
But the future of research is different – connected, dynamic panel data means we know how specific consumers felt and acted previously and we know how they have changed their attitudes and behaviours in response to events or marketing.

To show how this can work we have looked at Toyota, how people have changed their perceptions of the brand in light of last Autumn’s recall and what that means in terms of how Toyota should respond.

The key is the connected element of the data – we are hearing the views in post-crisis of the same people who gave us their views pre-crisis and we are overlaying media consumption data collected on a daily basis and demographic data all on the same people. Essentially building up a total picture on hundreds of thousands of people – how they live their lives, how they perceive brands and how it changes over time.

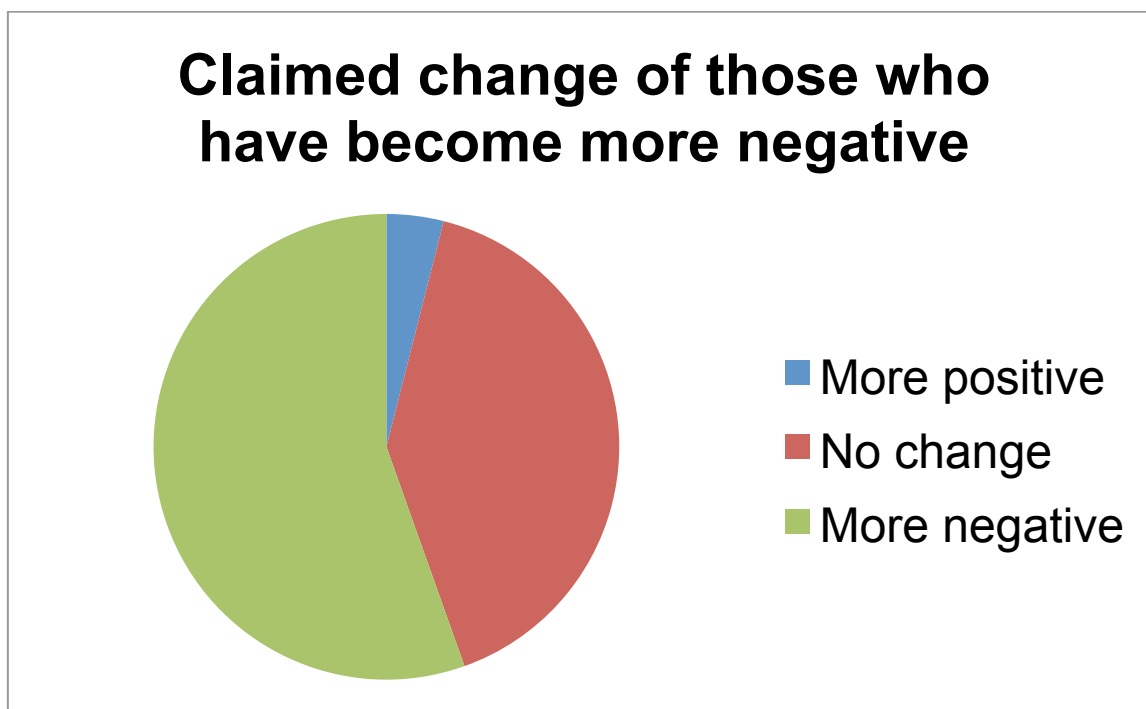
## Perception hit

We can see from BrandIndex that perceptions of Toyota fell after the recall. General Impression which had been at +29 fell as low as +15 (slowly recovering since to stand at +20 at the end of the year). That is what the daily tracker can tell Toyota – perception has fallen, they need to do something about that but the key strategy here is to win back the lost ‘positives’. So it is crucial to know exactly who is it that has changed their minds. To find that out we took a sample of those who has been positive about Toyota prior to the recall and re-asked them the questions; we then profiled the ones that had changed their mind.



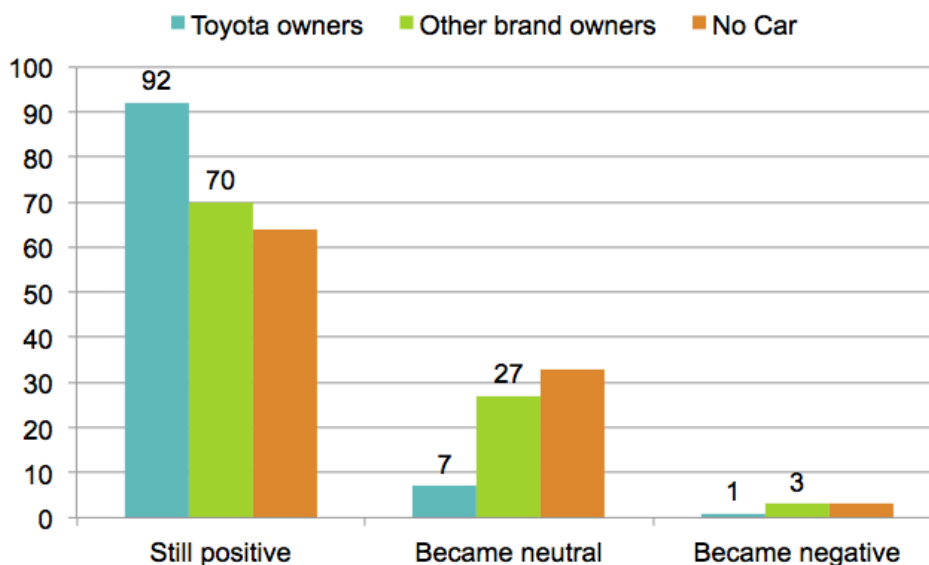
## False recall

The first finding backed up the hypothesis that people cannot remember changing their minds – of those that had previously been positive and no longer were only 56% said their views had got more negative; the remainder felt that they had always been negative towards Toyota forgetting that they had changed their views within the last few months.

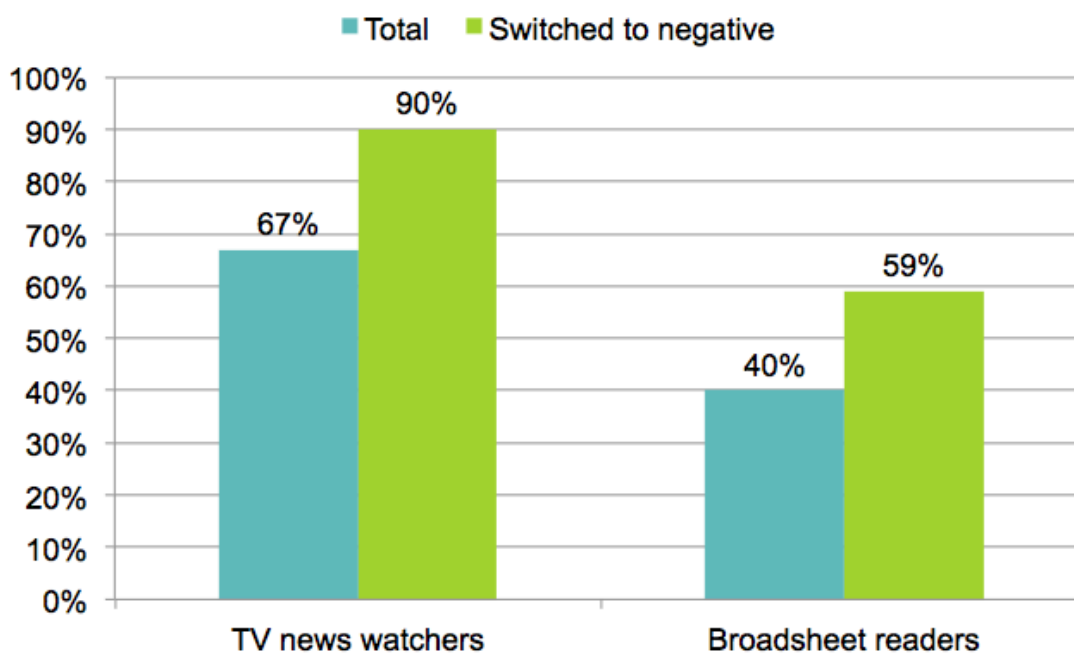


## Targetting

The next conclusion is a potentially positive one for Toyota – Toyota owners were significantly more likely to have maintained a positive opinion of the brand; 92% remained positive compared to 70% of other brand owners and 64% of those with no car. With 7% now neutral only 1 of the 151 Toyota owners questioned had actually switched to having a negative view of the brand. Remember – these are people who we had spoken to before, who had told us they were positive and we were now hearing from again.



So Toyota's issue lay with potential new buyers rather than current owners. As we delve into exactly who it is that have changed their minds we do hit some small sample sizes but nevertheless a very clear pattern emerges. The recall was essentially a news story and we see immediately that the people becoming negative are those that interact with news – 90% watched a news show the day before last being asked, 59% read broadsheets (compared to 40% for the total sample). The message for Toyota is very clear – if you want to respond with a marketing campaign then your media buy should be TV news shows and broadsheet newspapers.



## Messaging

In terms of what to say to them; they are consistent about what they think is wrong. The verbatim comments below give a flavour but it all comes down to loss of confidence in the reliability of Toyota. Rebuilding that confidence is the key. These are comments from people who were originally positive and are now negative...

- “Having product recalls all over the world recently doesn’t inspire confidence in the brand.”
- “Regularly using inferior manufacturers for various components, and having to call cars in to correct them - destroying their previously sound image altogether”
- “They’ve had lots of bad press lately concerning recalls for defects and safety issues.”

Actual messaging will need to be tested (and of course can be amongst the very group that is being targeted) but as an initial idea how about building on that positive vibe amongst customers. The quotes below show that those that actually drive Toyota’s today rave about the very thing that may concern potential new customers. Why not harness that to win back the lost potentials.

- “Excellent build quality and very reliable cars.”
- “Good personal experience with the brand through personal use of their vehicles.”
- “Have owned a Toyota for the last three years. This is the first Toyota I have owned and it is the best vehicle I have had in terms of price, quality, comfort and performance.”
- “I have driven a Toyota for over 20 years and have never experienced a problem. My brother has also driven Toyotas for a number of years and has a positive experience.”
- “Reliable, well built excellent service excellent value for money.”

## Conclusions

So if we were advising Toyota on how to respond to the recall we would suggest the following:

1. False recall makes it impossible to identify the key target – those whose opinion has worsened -just by asking. You need to use the power of panel and its connected dynamic data.
2. Current customers have remained positive; it is only new customers that Toyota need to worry about addressing on this issue.
3. Those who have turned negative are ‘news’ consumers so advertise on news and in broadsheets.
4. Overcoming the loss of confidence in reliability is key. The actual messaging needs testing (and can be amongst the key target) but building on the strong perceptions of reliability amongst current customers has to be a good start.

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