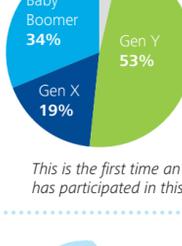


2014 Automotive Survey SA insights

Talking about Generation Y

The survey, initiated in 2013, focused on "the changing nature of mobility" and how the consumption of mobility affects various aspects of the automobile buying and ownership experience.

The **Global Automotive Consumer Survey** is based on a survey of over **23 000 consumers in 19 countries**. Key findings and insights are based on **South African responses to the survey**.



This is the first time an African country has participated in this survey.

Gen Y's market potential

80% of Gen Y consumers plan to purchase or lease a vehicle in the next 5 years.

Gen Y = 35% of current population. This roughly amounts to **19 million**.
Why is Gen Y important?
Gen Y represents the largest consumer segment since the Baby Boomers.
* Stats SA

Consumer automotive preferences

The mega trends that are redefining the mobility landscape



What SA millennials say



Gen Y's purchase motivations

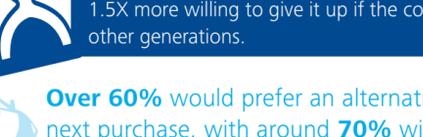
Top reasons for making a purchase



Top three reasons why consumers don't buy



... but are consumers willing to buy cars? (interested in current models)



75% of Gen Y consumers love to drive their cars, but would be **1.5X** more willing to give it up if the cost increases when compared with other generations.

Over 60% would prefer an alternative powertrain for their next purchase, with around **70%** willing to pay more for it.

Power train options:



How Gen Y chooses their cars

89% of Gen Y spend more than 10 hours researching and consider 3 or more brands when making a decision

Information sources impacting the buying decision

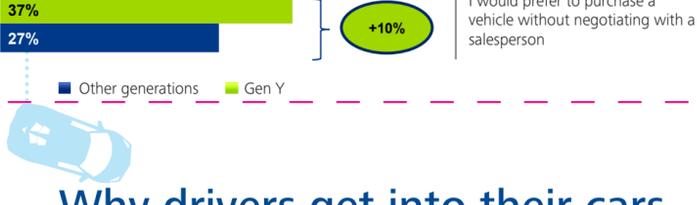


What Gen Y want from their dealerships

8 out of 10 Consumers want an extremely efficient purchase process



Consumers have **A POSITIVE IMAGE OF AUTOMOTIVE DEALERSHIPS**, and over a third of Gen Y would prefer to skip the negotiation process.



Why drivers get into their cars

The generational comparison

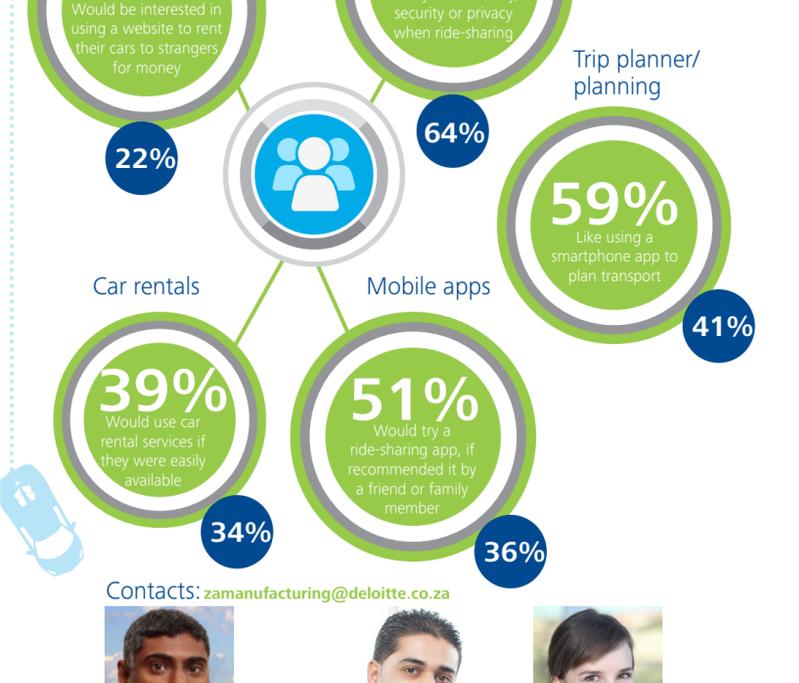
Why do you drive?



Gen Y consider rentals, ride-sharing and technology

They value the importance of safety and technology enablement.

Percentages based on feedback from Gen Y respondents



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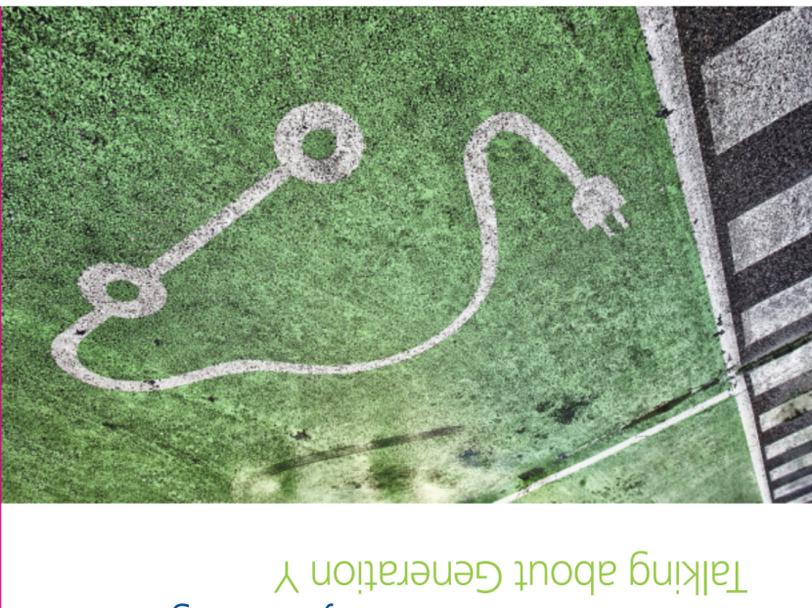
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