

RENAULT KOLEOS AND THE CROSSOVER & SUV SEGMENT

PRE-CAMPAIGN AND POST-CAMPAIGN
COMPETITIVE BENCHMARK ANALYSIS
IN BULGARIAN USER-GENERATED MEDIA



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media analysis leading to insights

Key Findings

- The analysis of Bulgarian user-generated media (UGM) in the period from September 1st to October 31st 2008 generated 149 relevant postings on the chief competitors in the crossover and SUV sectors - Volkswagen Tiguan, Peugeot 4007, Nissan Qashqai, Toyota RAV4, Renault Koleos, Ford Kuga, Honda CR-V, Hyundai Santa Fe, Opel Antara, Suzuki Grand Vitara, Citroen Crosser and Kia Sportage.
- Renault Koleos and Nissan Qashqai accounted for the largest share of UGM buzz in the analyzed period (27 postings each) followed closely by Ford Kuga with 24 postings.
- Peugeot 4007 and Honda CR-V were next with 14 and 13 postings respectively while Volkswagen Tiguan and Opel Antara brought up the tail of the list with 6 relevant postings each.
- The competitor that managed to attract the largest percentage share of brand promoters was Suzuki, whose Grand Vitara was among the competitors with the smallest share of coverage. The Grand Vitara generated five postings promoting the brand out of a total of 7 postings.
- Hyundai Santa Fe also attracted a great share of promoters – 6 out of a total of nine postings.



Key Findings

- Nissan Qashqai generated the largest share of brand detractors (15 detractors out of 27 postings).
- Koleos had 11 detractors out of 27 postings.
- Toyota RAV-4 followed with four detractors out of a total of nine postings.
- Volkswagen Tiguan was the only competitor that had no detractors at all, while Citroen Crosser had the largest share of postings that demonstrated no preference.
- As regards drivers of coverage, overall quality was by far the most discussed topic across all competitors followed by design.
- Renault Koleos' overall qualities were the most keenly discussed. The largest share of attention as regards design was focused on Ford Kuga.
- Interestingly enough, users expressed their dislike of Koleos' design in eight out of the 10 postings speaking about design, while Kuga's design was positively appreciated by users in eight out of the 11 postings on the vehicle's design.
- Pricing was also a topic that generated significant buzz especially for Ford Kuga.
- Fuel consumption only appeared as top driver of coverage with Nissan Qashqai and here it received only positive mentions.

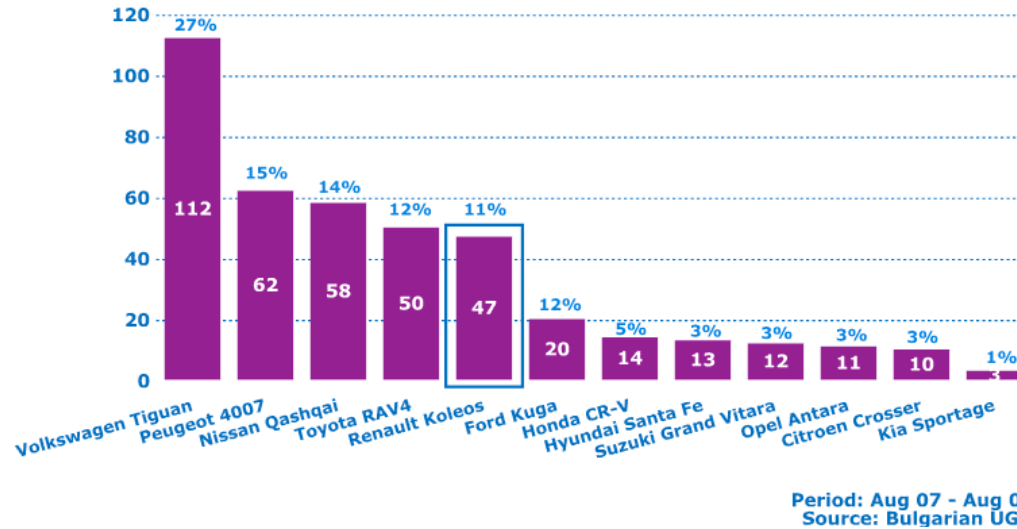


Key Findings

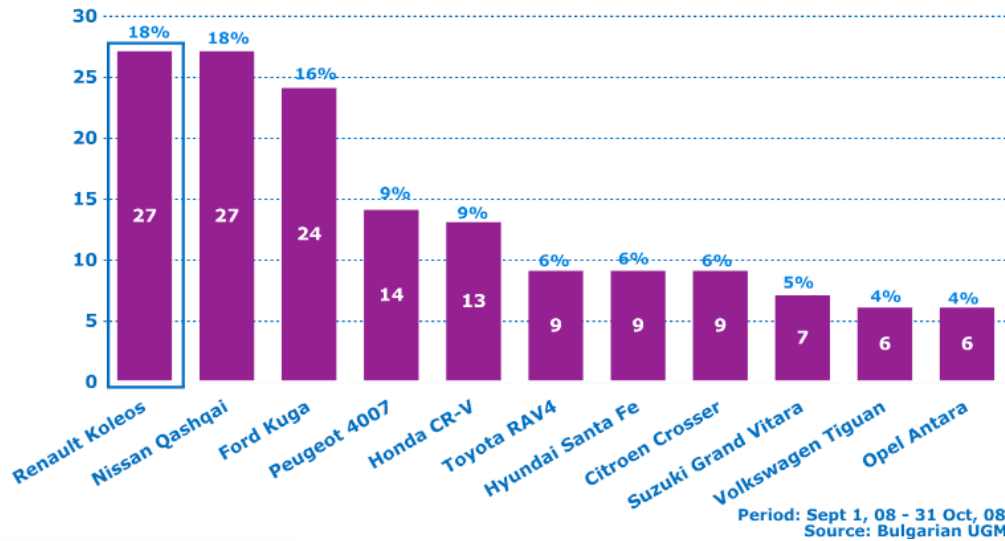
- Extras, on the other hand, were among the top drivers of coverage for Toyota RAV-4 only and were discussed in a negative tone.
- The analysis of emotional connectors, or the emotional tinge of users' comments, yielded interesting results.
- Hyundai Santa Fe was the car to receive the largest share of approval, while Suzuki Grand Vitara was the most admired car.
- Toyota RAV-4 was the competitor with the least emotionally connected coverage, while Nissan Qashqai triggered mostly disappointment.
- Renault Koleos had the largest share of critical postings. It was also the only competitor that had skepticism as an emotional connector.
- Renault Koleos was also the competitor that triggered the greatest variety of emotional connectors.
- The top source of user comments on the analysed models was offroad-bulgaria.com, which featured user generated coverage on the majority of competitors analyzed.
- Vbox7.com and automedia.bg were the second most prolific sources with six threads each.



Number of postings by competitor - Before



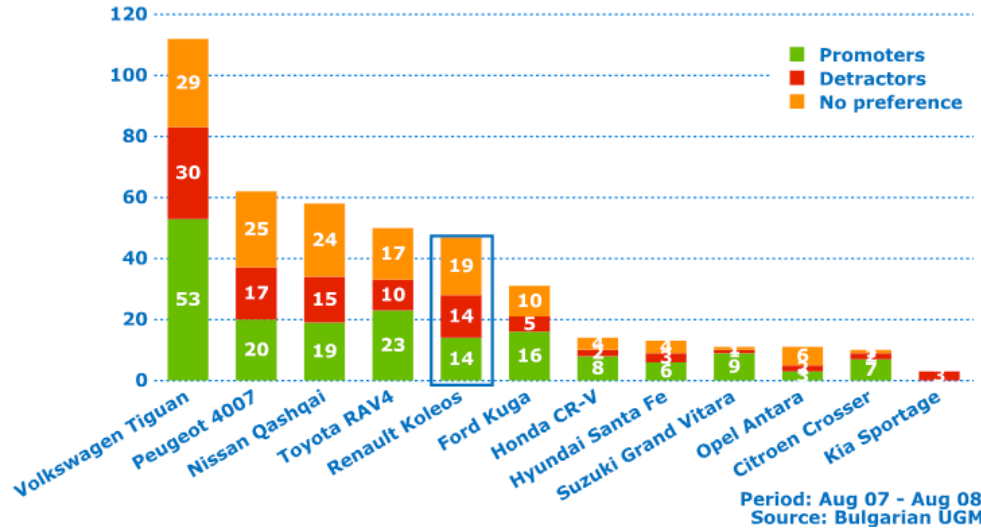
Number of postings by competitor - After



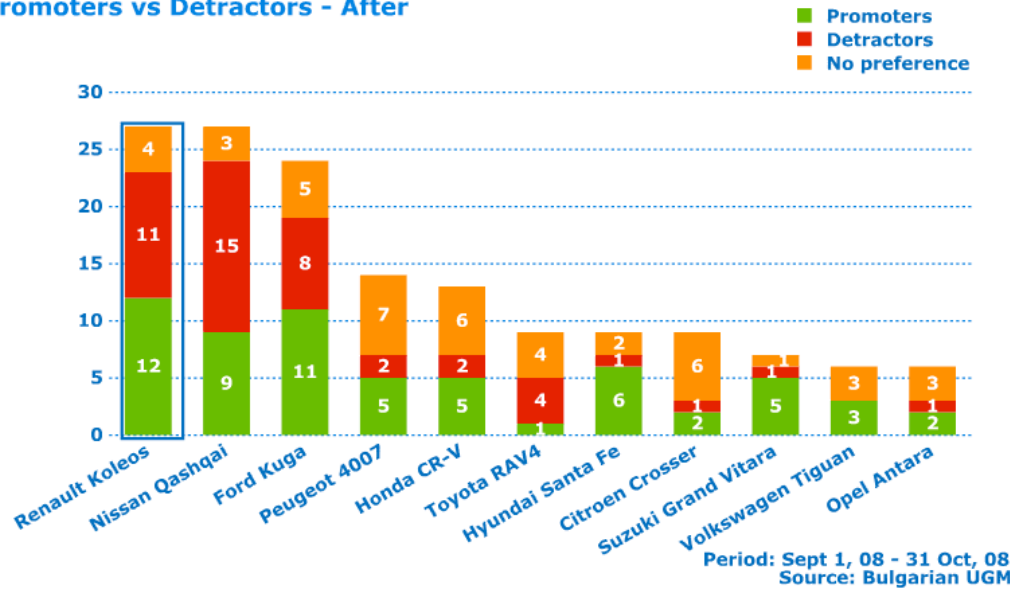
Point made that the periods compared differ a lot in length, i.e. before the campaign we covered a years' volume of publications, while the second period covers only two months after the launch of Renault Koleos, it has to be noted that as regards the volume of postings, in just a couple of months Koleos has moved from fifth to the leading position, which it shares with Nissan Qashqai.



Promoters vs Detractors - Before



Promoters vs Detractors - After

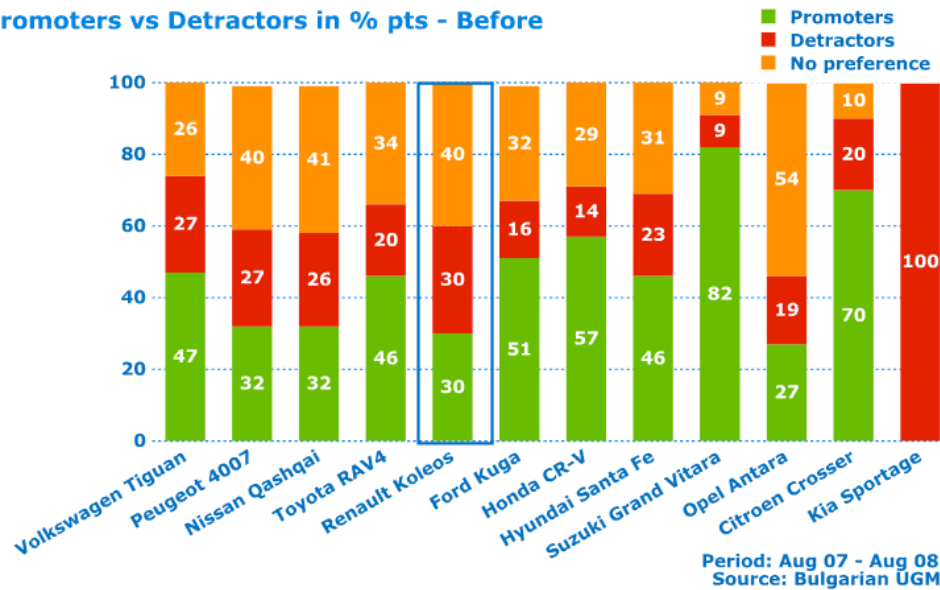


The share of neutral postings about Renault Koleos has dropped considerably in the second period, increasing the share of positive and negative postings and proving a greater awareness of the brand among Bulgarians and the fact that they have formed an opinion about it.

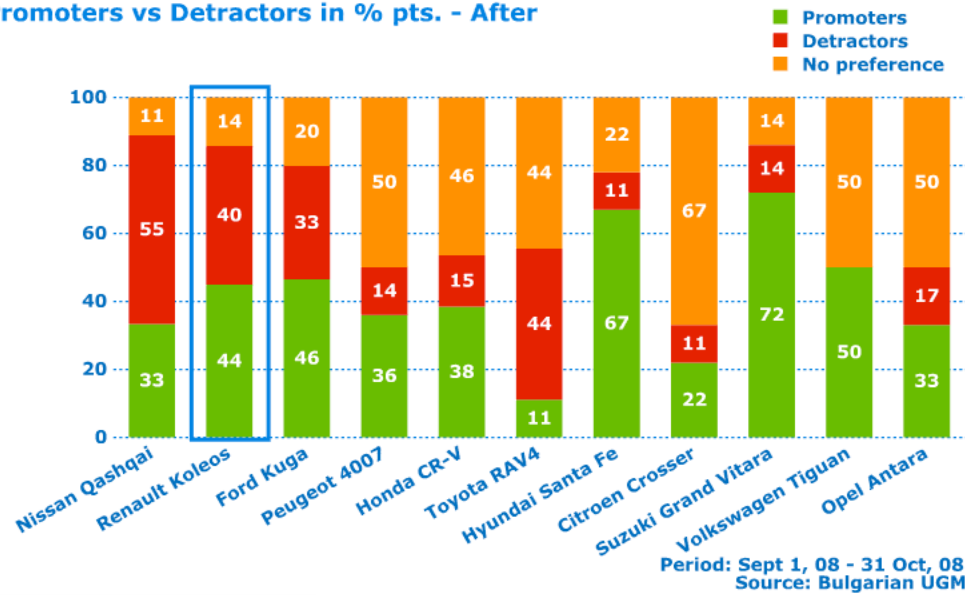
The share of postings about Volkswagen Tiguan has dropped considerably in the second period and thus the brand has moved from the leading position in the first period to lagging behind with just 6 postings in the second period.



Promoters vs Detractors in % pts - Before



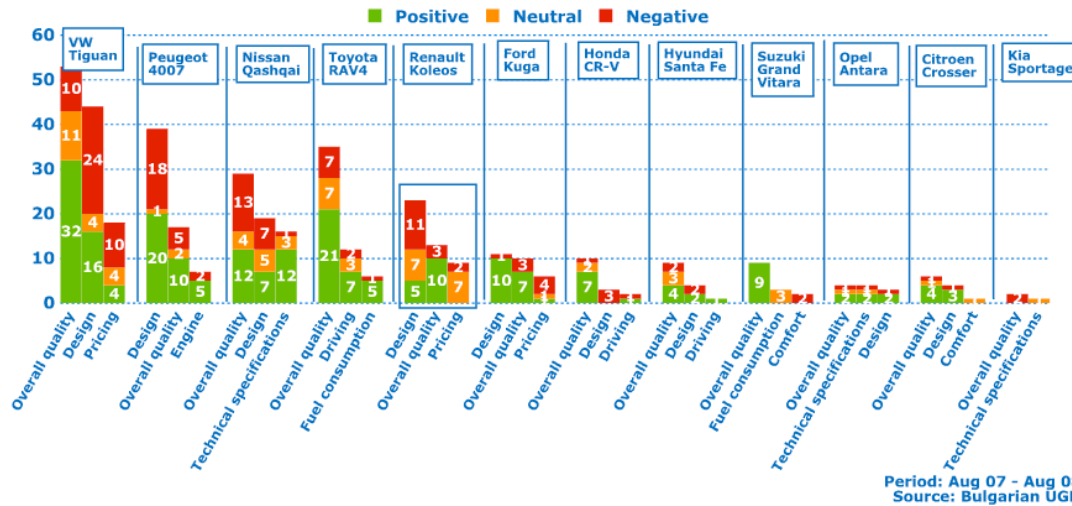
Promoters vs Detractors in % pts. - After



The graphs in percentage points show a clearer picture of how the share of brand promoter and detractors has changed in the second period.

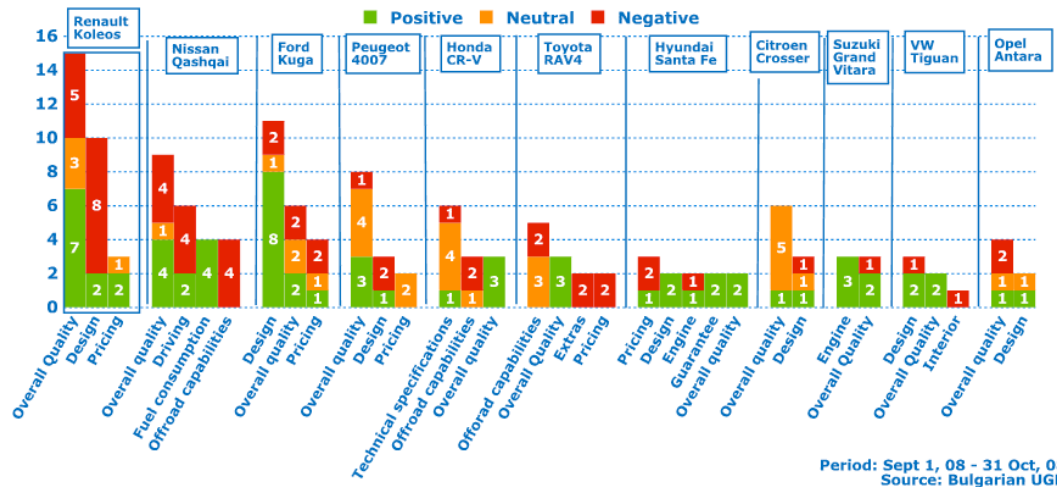


Top 3 Drivers by Brand / Sentiment - Before



Here, overall quality has been assigned to postings commenting the different car makes in general, without details on a particular feature. So, in terms of most discussed product feature, design tops the list, followed by pricing and fuel consumption.

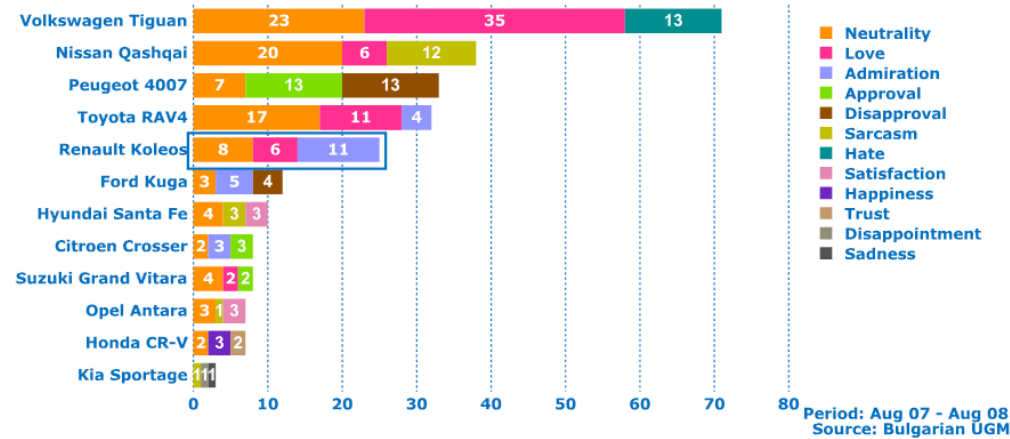
Top 3 Drivers by Brand / Sentiment - After



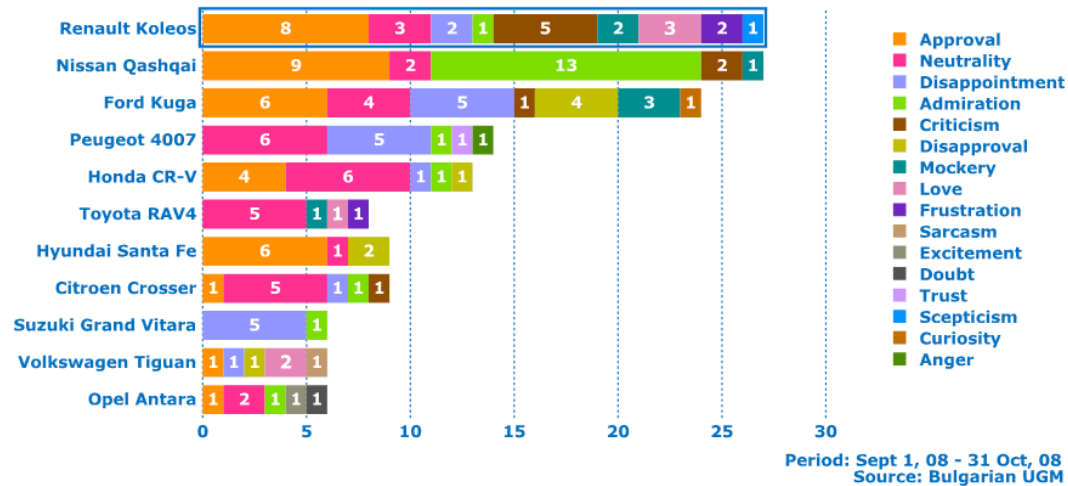
Renault Koleos has kept the share of positive, negative and neutral postings on overall quality unvaried between the first and second period. The situation changed with design – while before the campaign there were some neutral postings about the make’s design, after the campaign people were either positive or negative – again, a marker for greater brand awareness.



Postings sentiment - Before
All competitors



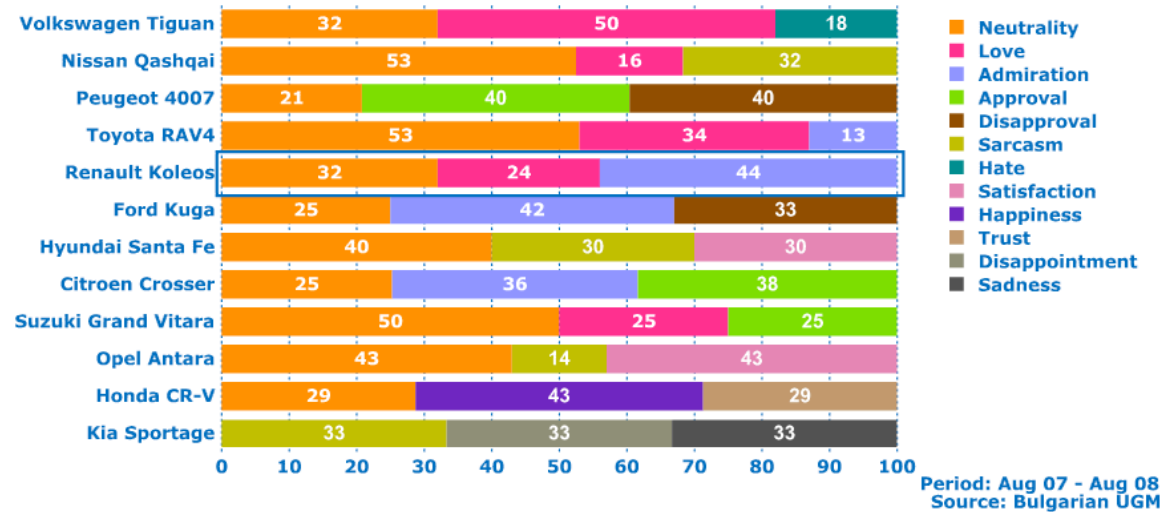
Postings sentiment - After



As regards the emotional tinge of users' postings, the overall situation has changed a lot: neutrality on the segment as whole prevails in the first period and more varied emotional connectors appear in the second period. This could probably be attributed to the fact that the launch campaign has generated more conversations on the segment as a whole.

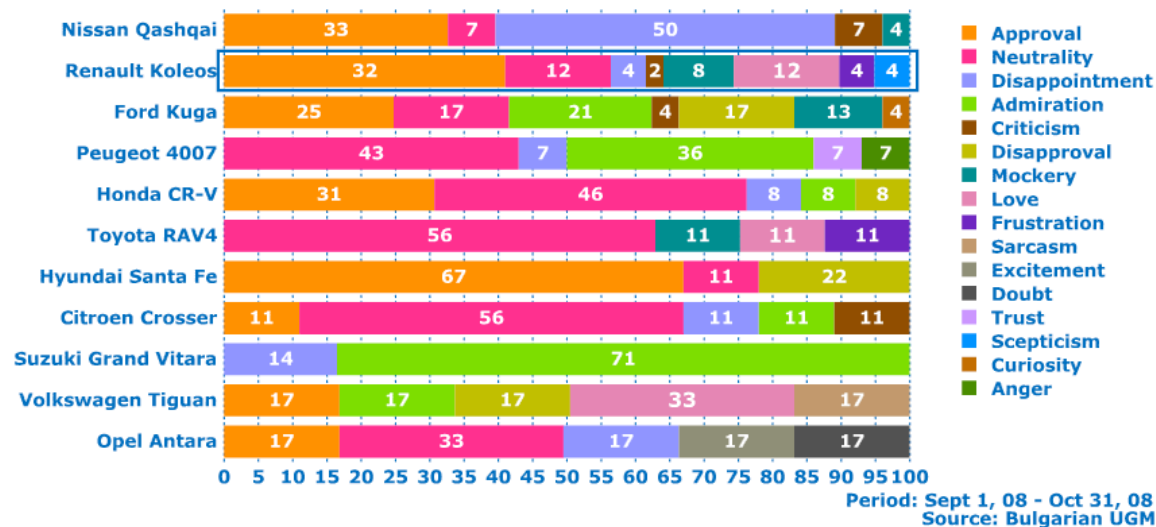


Postings sentiment in % pts. - Before

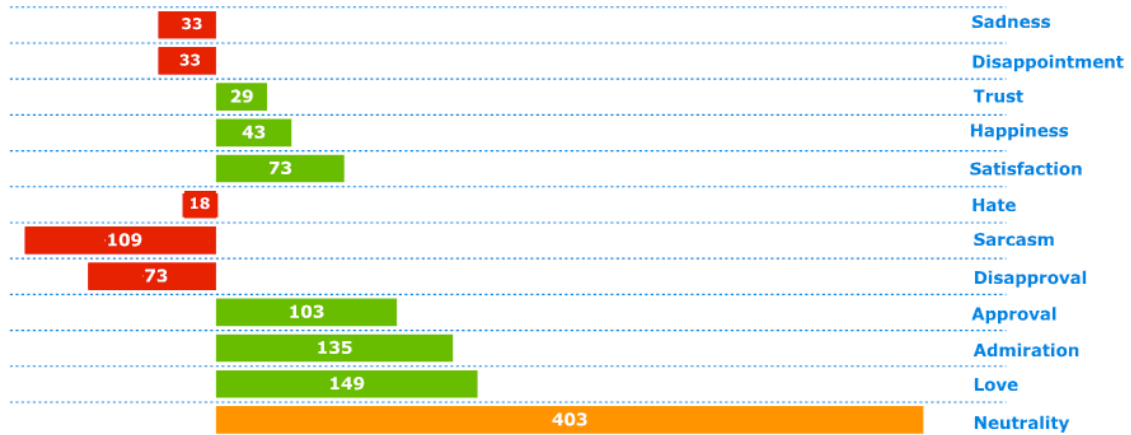


The same data as the previous slide, this time showing the change in percentage points of each emotional connectors. More 'pink' in the second graph shows more love for the segment as a whole.

Postings sentiment in % pts. - After



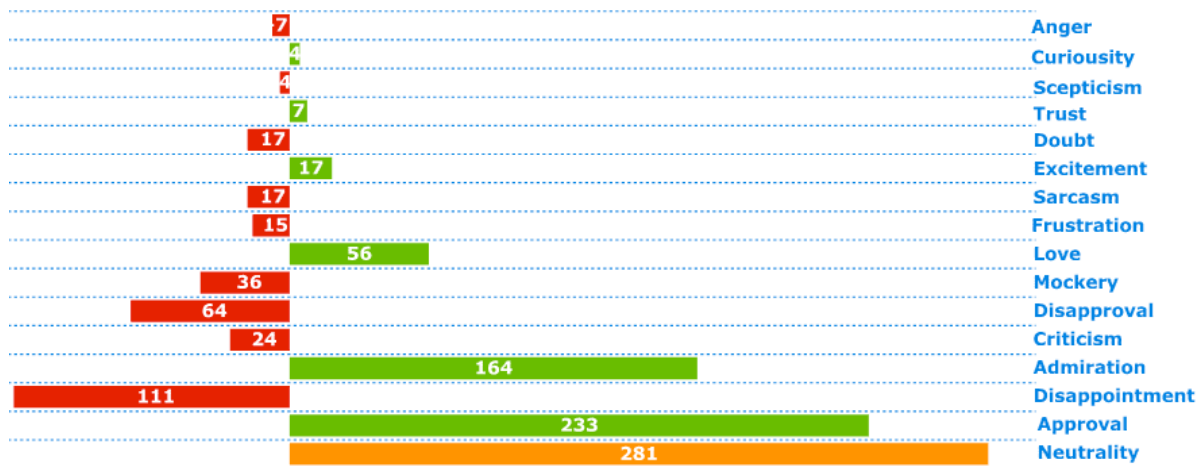
Postings' emotional connectors - SUV and crossover segment - Before



Period: Aug 07 - Aug 08
Source: Bulgarian UGM

To be noted – the drop in sarcasm and the raise in approval and admiration in the second period.

Postings' emotional connectors - SUV and crossover segment - After



Period: Sept 1, 08 - 31 Oct, 08
Source: Bulgarian UGM



Renault Koleos cont.

