

Changing patterns in bodyshape selection by new vehicle buyers

There has been a shift in vehicle bodyshape preferences over the past decade, with Crossover / SUV bodyshape purchases more than doubling to 31% in 2021, making it the best-selling bodyshape category this year.

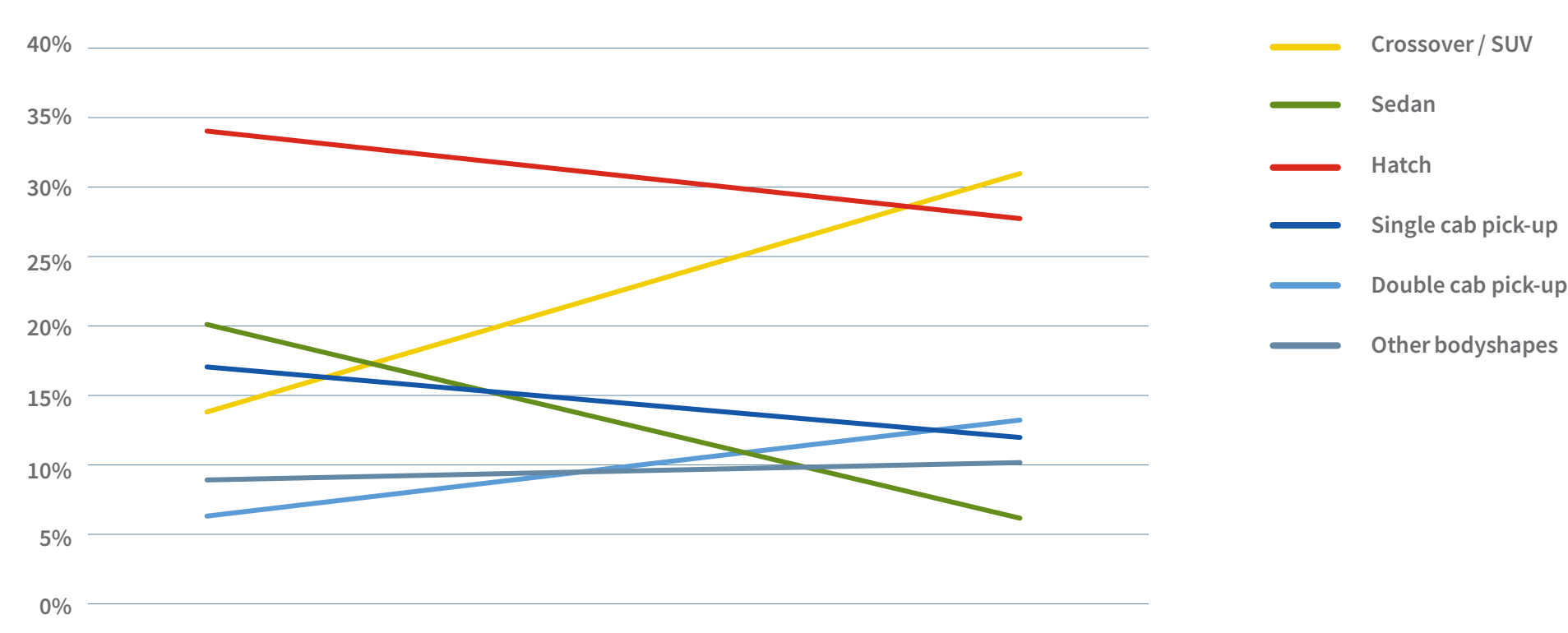
This growth has been matched by the Double Cabs, which has seen its share of new Light Vehicle sales jump to 13% in 2021.

The broad bodyshape categories include:	Brand examples:
Cabriolet / Coupe	BMW 4 Series, Ford Mustang, Kia Cerato
Crossover / SUV	Ford EcoSport, Toyota Fortuner, VW Tiguan
Estate	Audi A4 Avant, BMW 3 Series, Volvo V60
Hatch	Ford Figo, VW Polo Vivo, Hyundai i20
Minibus / MPV	Suzuki Ertiga, Toyota Avanza, VW Kombi
Sedan	BMW 3 Series, Toyota Corolla, VW Polo Vivo
Single Cab pick-Up	Chevrolet Utility, Nissan NP200, Toyota Hilux
Double Cab Pick-Up	Ford Ranger, Isuzu KB/D-Max, Toyota Hilux
Extended Cab Pick-Up	Ford Ranger, Isuzu KB/D-Max, Toyota Hilux
Minibus Taxi	Nissan NV350 Taxi, Toyota Hi-Ace
Panel Van	Ford Transit Custom, Toyota Quantum, VW Caddy

In 2011, new vehicle sales in the Light Vehicle Market (both Passenger and Light Commercial vehicles) were dominated by the Hatch, Sedan and Single Cab Pick-Up bodyshapes, which were responsible for more than 70% of all Light Vehicle sales. The Crossover / SUV bodyshape enjoyed 14% of the sales in 2011, while the Double Cab Pick-Up enjoyed 6% market share.

The graph below shows the Crossover / SUV and Double Cab bodyshapes growth in popularity, and the decline of the Hatch and Single Cab shapes, and most significantly, the Sedan. As recently as 2003, Sedans enjoyed market share of 30%, but the last 10 years have seen market share for this bodyshape slip from 20% in 2011 to 6% in 2021.

Change in bodyshape market share of Light Vehicle Market - 2011 to 2021

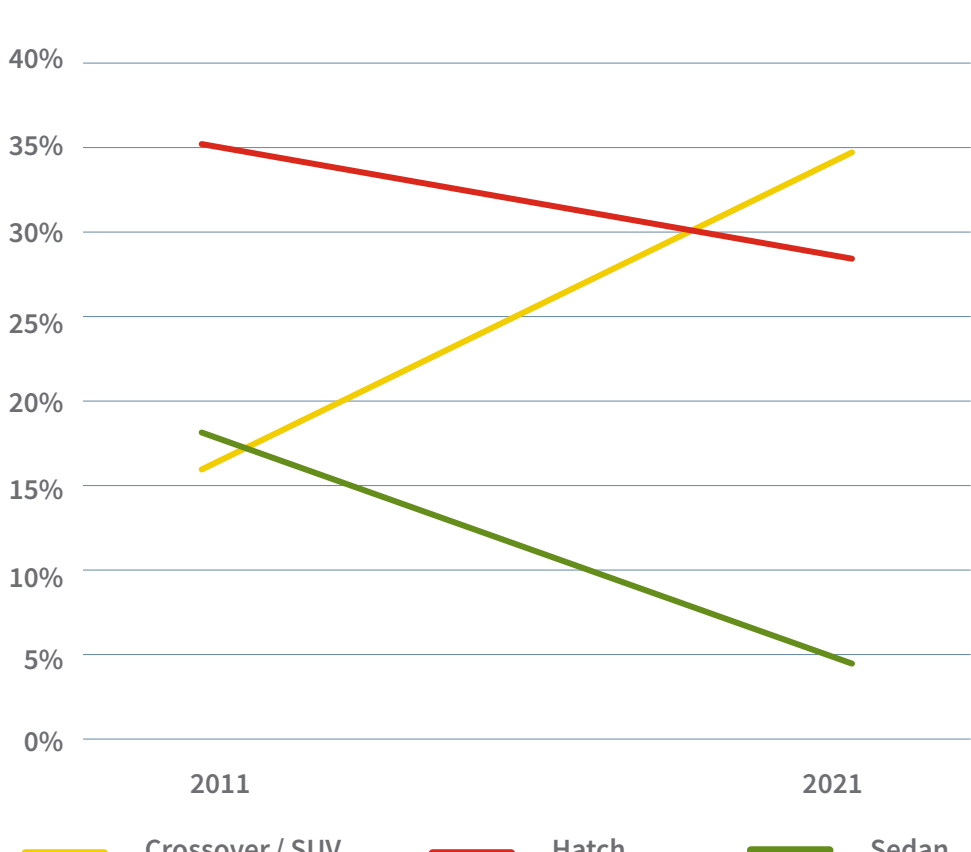


As mentioned this growth has come at the expense of the Hatch and at a provincial level this is very evident.

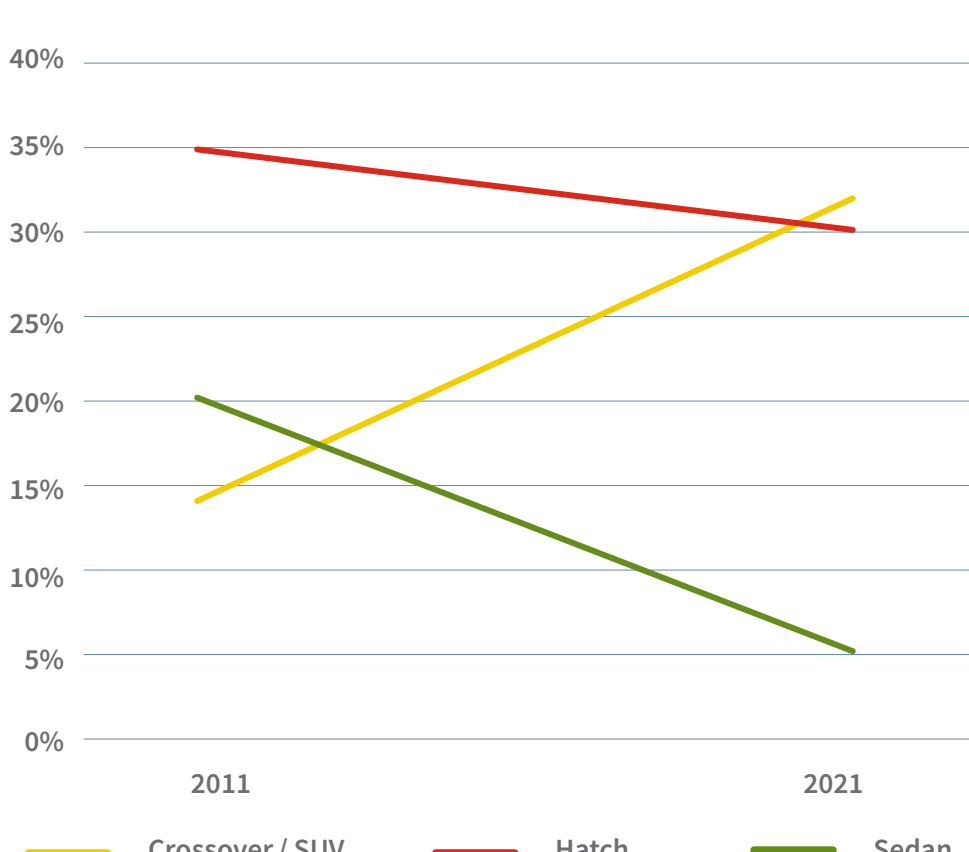
We have selected the top two bodyshapes in 2011 and the top two bodyshapes in 2021 – in terms of market share – for a range of provinces in order to demonstrate how the buying patterns in these regions have changed over the past decade.

Interestingly, while the Hatch shape has lost its top spot in a number of areas, it is currently still the second biggest selling bodyshape. The only area where the Hatch was not the number one in 2011 is in Namibia, which was dominated by Single Cab sales. Namibia is also the only region listed which does not see the Crossover / SUV in top spot in 2021 – this is still a pick-up, only now it is the Double Cab.

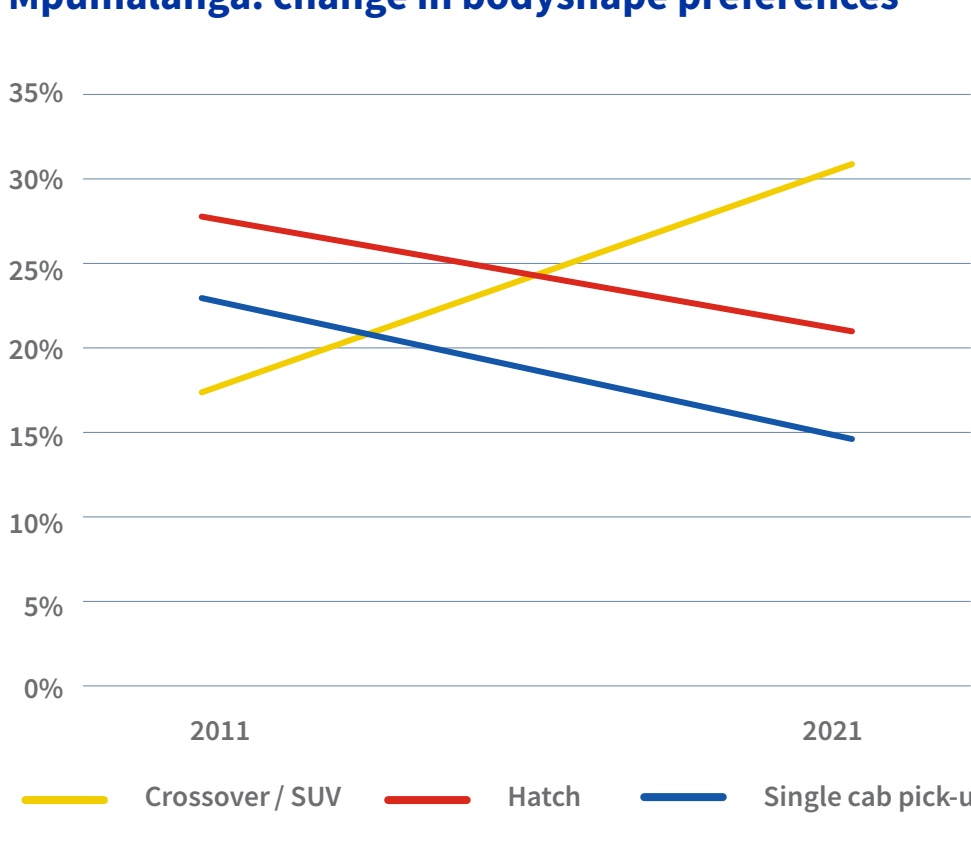
Gauteng: change in bodyshape



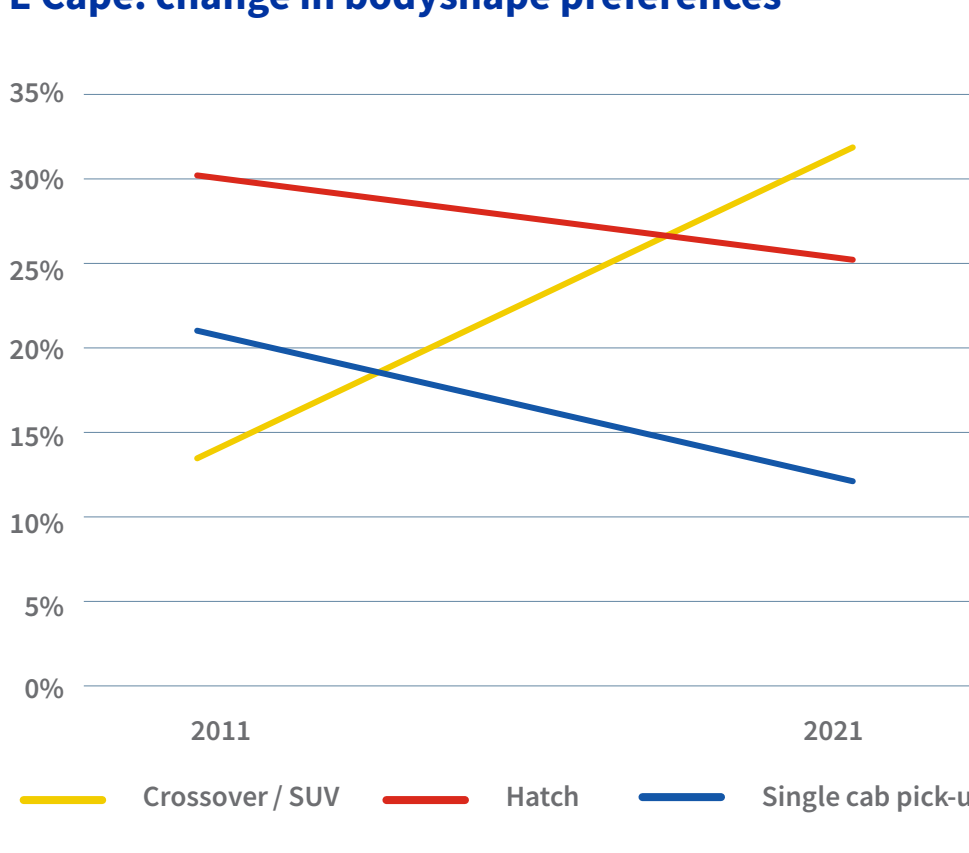
KZN: change in bodyshape



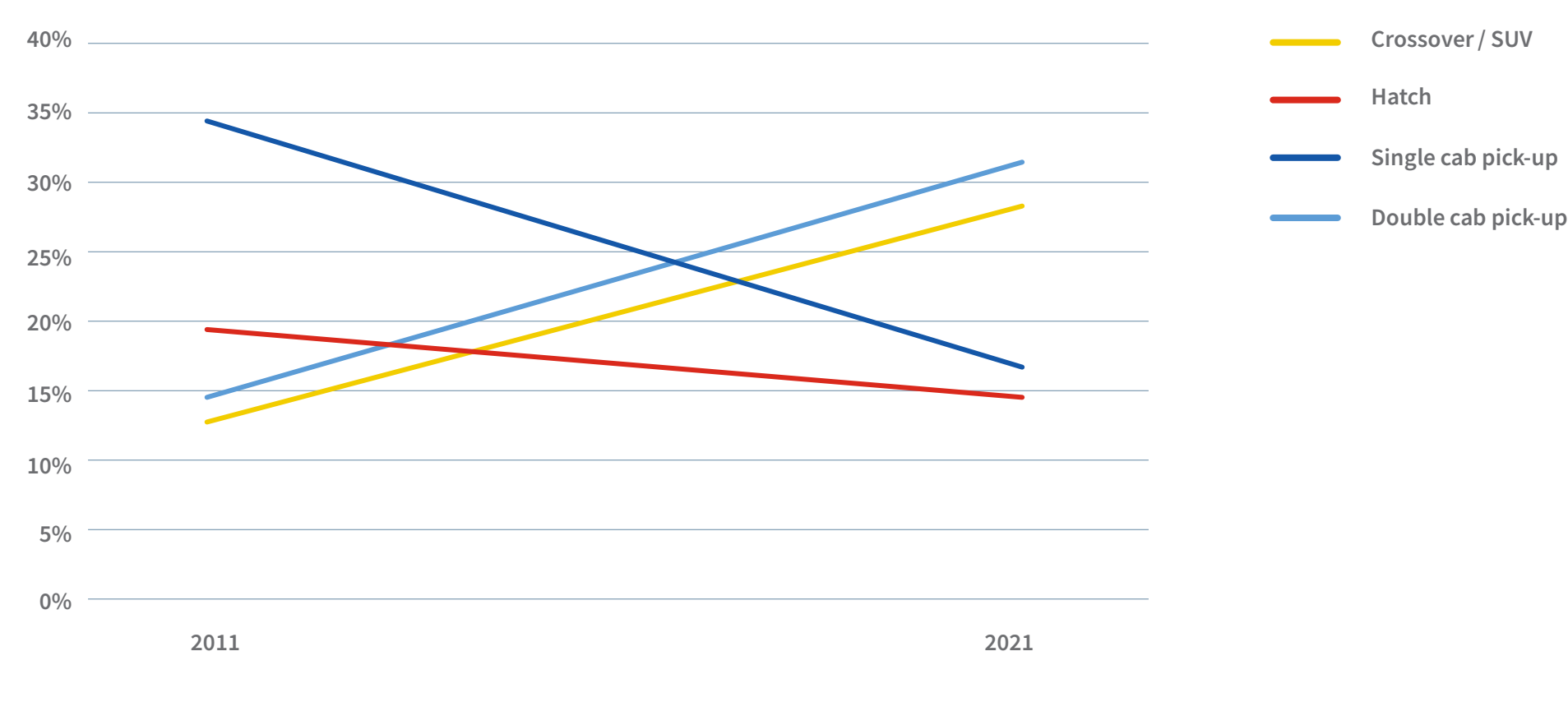
Mpumalanga: change in bodyshape preferences



E Cape: change in bodyshape preferences



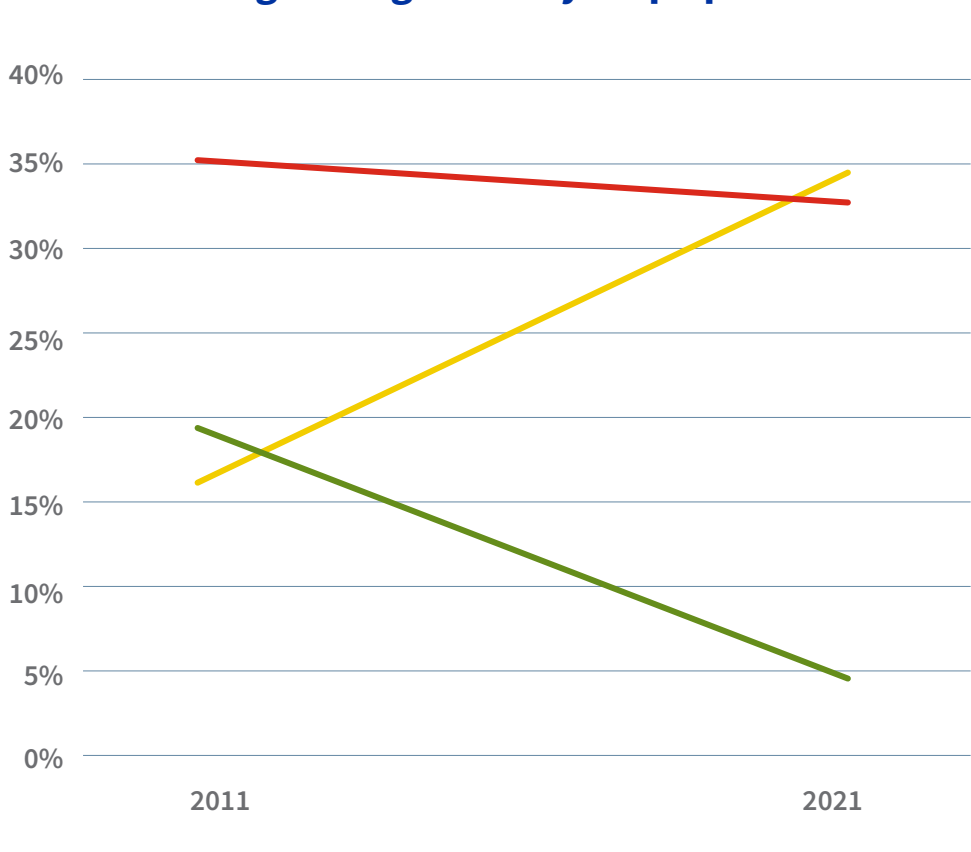
Namibia: change in bodyshape



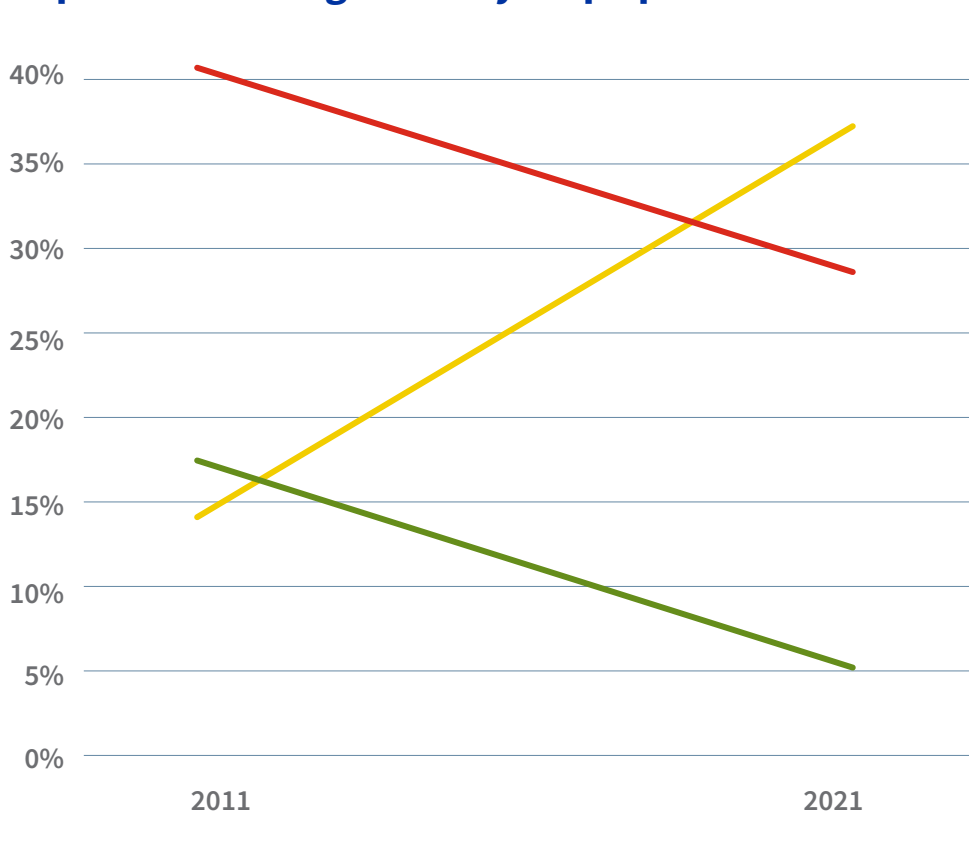
These results are essentially mirrored across all the major urban areas, with the Crossover / SUV and Double Cab bodyshapes the top two most improved over the last decade in terms of market share. What is interesting, however, is that the only other bodyshape which has seen growth in market share across all these regions is the Extended Cab Pick-Up.

As far as the best-selling bodyshape in the biggest metros, the only area where the Crossover / SUV has not usurped the Hatch as the top-selling shape is eThekweni, where the latter, despite dropping from a market share of almost 40% in 2011 to 33% in 2021, is still out-selling the former – albeit just.

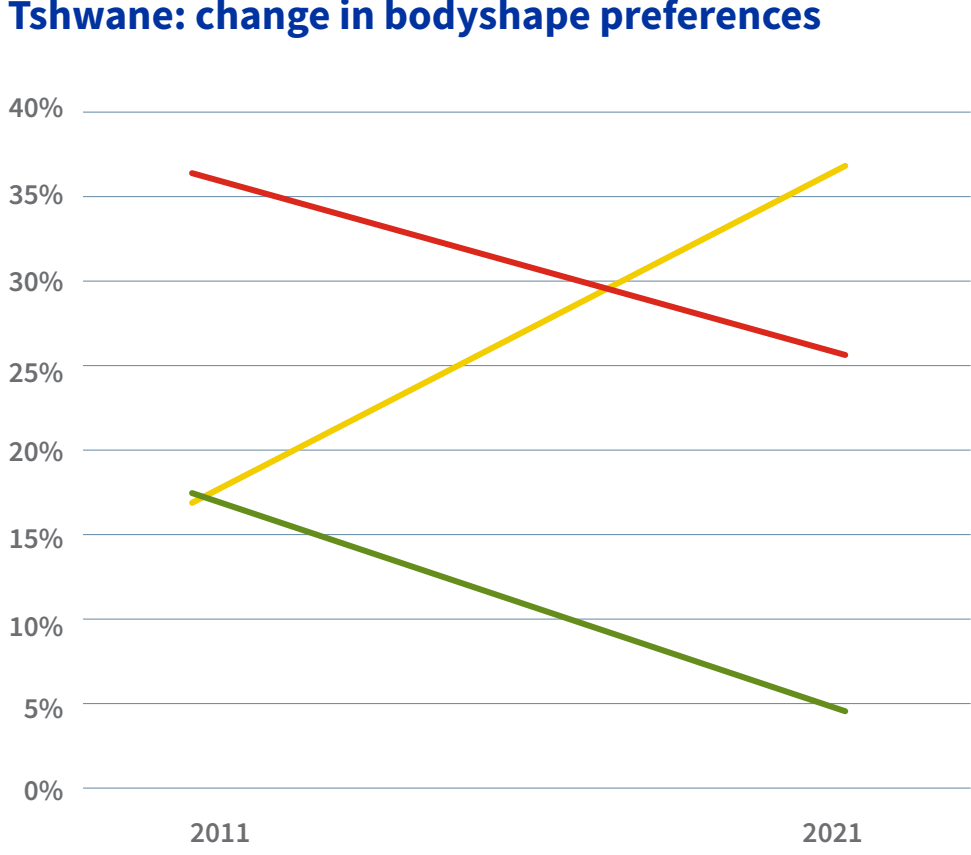
Johannesburg: change in bodyshape preferences



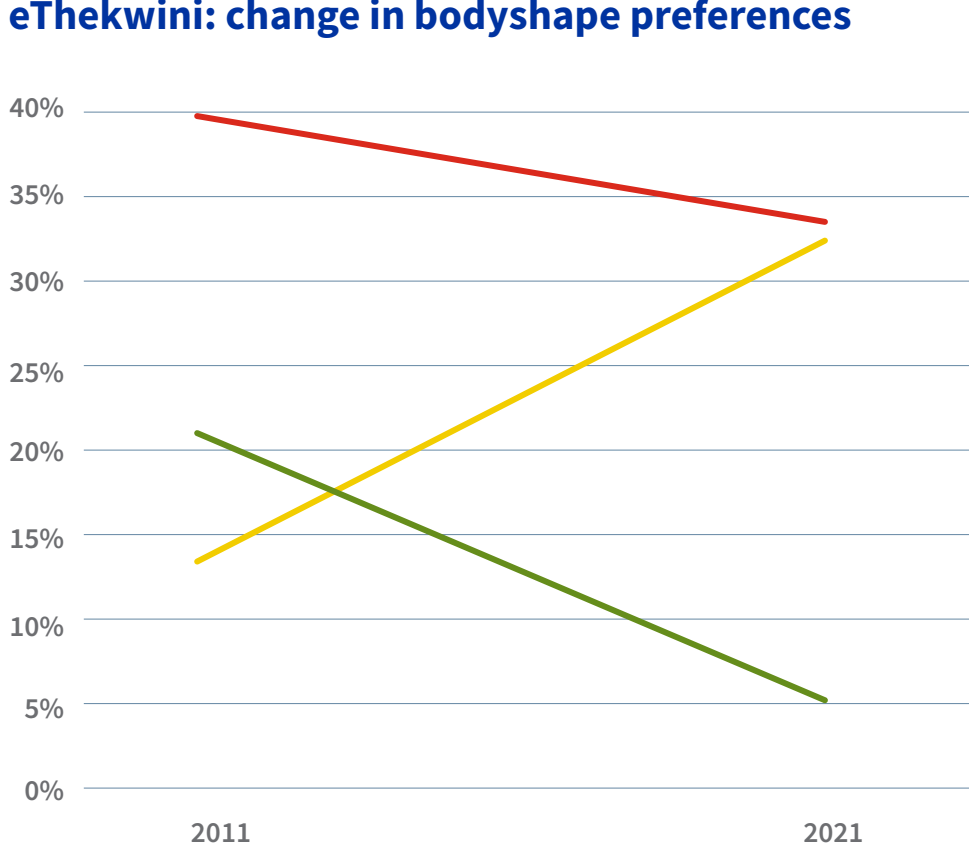
Cape Town: change in bodyshape preferences



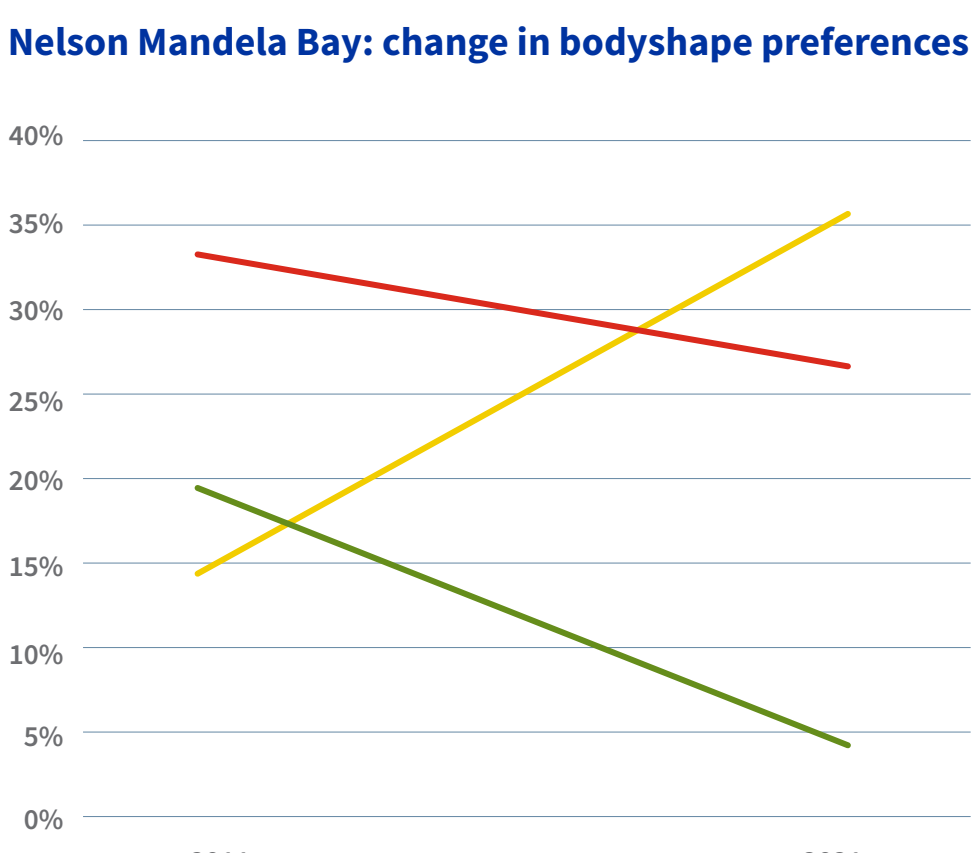
Tshwane: change in bodyshape preferences



eThekweni: change in bodyshape preferences



Nelson Mandela Bay: change in bodyshape preferences



Ekurhuleni: change in bodyshape preferences

