



BRAND WATCH

NON-LUXURY SEGMENT TOPLINE REPORT

2nd Quarter 2021



BRAND WATCH Q2 2021 KEY TAKEAWAYS



Pickup consideration rebounded

Chevrolet Silverado and Ford F-Series gained traction



Ford soared

F-Series, Explorer and Mustang Mach-E consideration lifted



RAM took the most top honors for second consecutive quarter - Driving Performance, Interior Layout, Technology, Exterior Styling and Ruggedness



BRAND WATCH: NON-LUXURY CONSIDERATION

Despite inventory challenges due to the chip shortage, Toyota held the top spot it has owned for three straight years. Ford narrowed the gap with Toyota. Ford and Chevrolet made strides driven by increased pickup consideration. Japanese brands Honda, Subaru, Nissan and Mazda lost steam.

Toyota Stayed on Top

Toyota consideration slipped by one point; RAV4, Highlander and Tacoma declined. The rise in Camry consideration helped offset the low. Camry returned to the Top 10 list for the first time in a year.

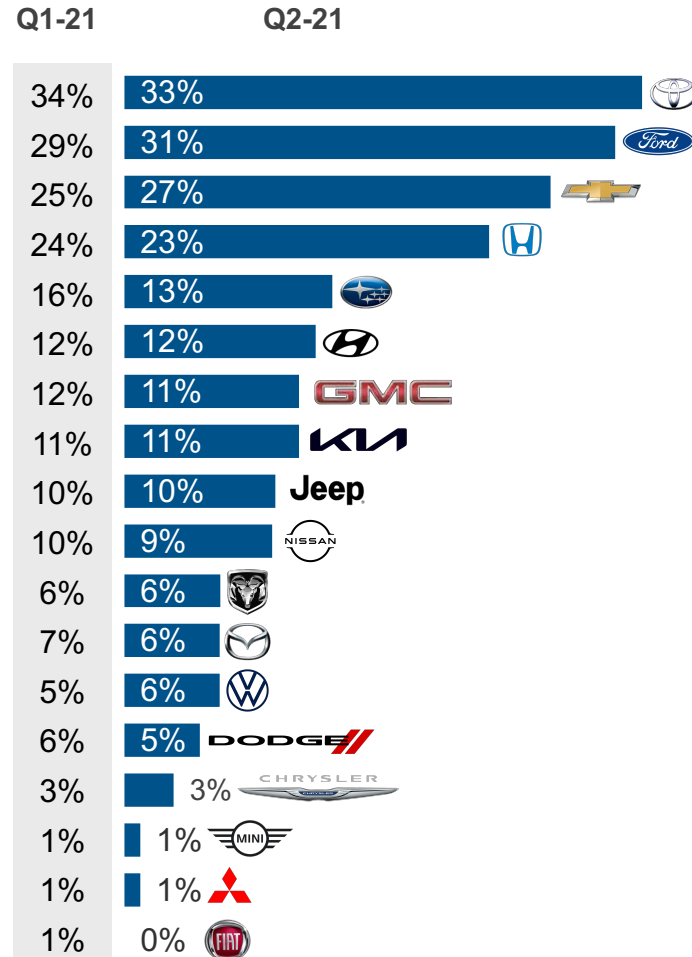
F-Series was Driving Force in Ford Surge

Ford was one of the few on the upswing. Consideration soared for F-Series, Explorer and Mustang Mach-E.

Subaru Tumbled, Gap Widens with Rivals

Subaru inventory was among the industry's lowest, contributing to the three-point drop in consideration. Outback and Forester lost the most among the Top 10 Most Considered Non-Luxury Models. Impreza consideration fell to a lesser degree.

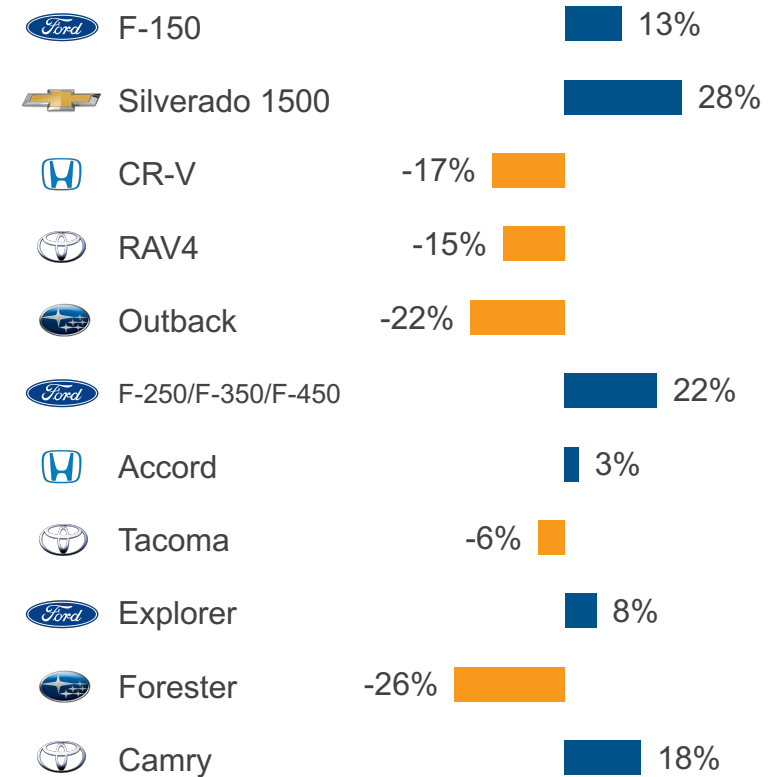
QUARTERLY BRAND CONSIDERATION



QUARTERLY CONSIDERATION GROWTH

TOP 10 MODELS

Q2-21 vs. Q1-21



A CLOSER LOOK: NON-LUXURY SEGMENT CONSIDERATION

SUV consideration leveled off after reaching new heights in Q1. Pickup consideration rebounded from Q1; Full-Size Trucks led the way. Car and Minivan remained stable from Q1.

QUARTERLY SEGMENT CONSIDERATION

64% 
SUVS

Last Qtr.	Last Year
67%▲	63%

33% 
CARS

Last Qtr.	Last Year
33%	35%






31% 
PICKUPS

Last Qtr.	Last Year
29%▼	35%▲






5% 
MINIVANS

Last Qtr.	Last Year
6%	5%

TOP 5 SUVs

- #1  CR-V
- #2  RAV4
- #3  Outback
- #4  Explorer
- #4  Forester






TOP 5 CARS

- #1  Accord
- #2  Camry
- #3  Civic
- #4  Mustang
- #5  Corvette

TOP 5 PICKUPS

- #1  F-150
- #2  Silverado 1500
- #3  F-250/F-350/F-450
- #4  Tacoma
- #5  1500

TOP 5 MINIVANS

- #1  Sienna
- #1  Odyssey
- #3  Pacifica
- #4  Sedona
- #5  G. Caravan

Slowdown in SUV Consideration

- SUV consideration softened due to declining Compact and Midsize SUV shopping. Both categories had low supply.
- Volume leading Honda CR-V and Toyota RAV4 dropped; Toyota Highlander fell from Top10.
- SUV consideration may rebound when new entrants arrive, like the new Toyota Corolla Cross and Mazda CX-50 and redesigned Toyota Sequoia and Jeep Grand Cherokee.

Cars Remain Steady

- Car consideration held steady as SUV shoppers looked for alternatives to used and low-supply SUVs. Honda Accord/Civic and Toyota Camry increased consideration.

▲ ▼ indicate significant % change Q/Q

Last Qtr. = Q1-21, Last Year = Q2-20

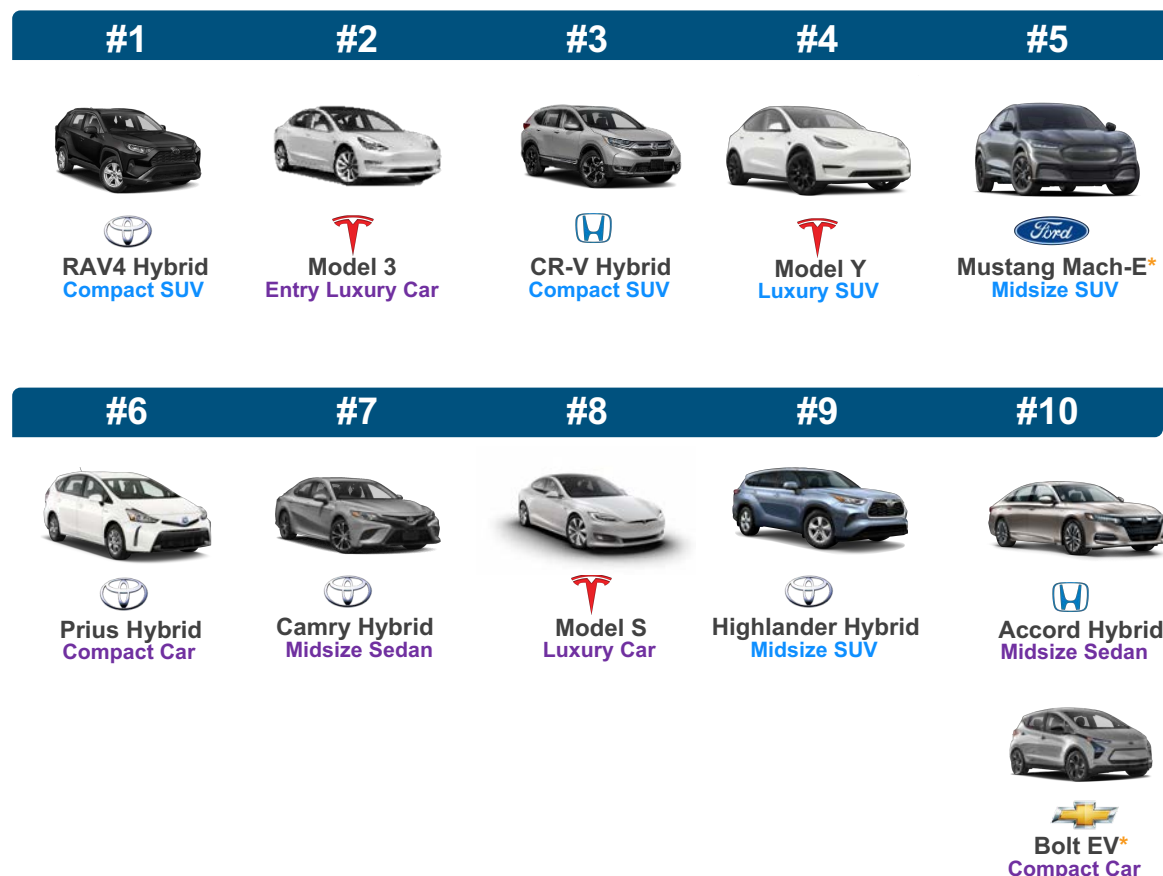
Interpretation Example: 63% of non-luxury shoppers consider non-luxury SUVs

TOP 10 CONSIDERED ELECTRIFIED MODELS & OVERALL CONSIDERATION

Shopping consideration for electrified vehicles (EVs, hybrids) increased as did sales, setting a record 250K sold. Ford Mustang Mach-E made a strong debut at No.5. Chevrolet Bolt secured No. 10. EV consideration likely will accelerate as new and redesigned entrants hit showrooms, like Chevrolet Bolt EUV, Rivian R1S, BMW i4, Audi Q4, Ford F-150 Lightning, Nissan Ariya, and more.

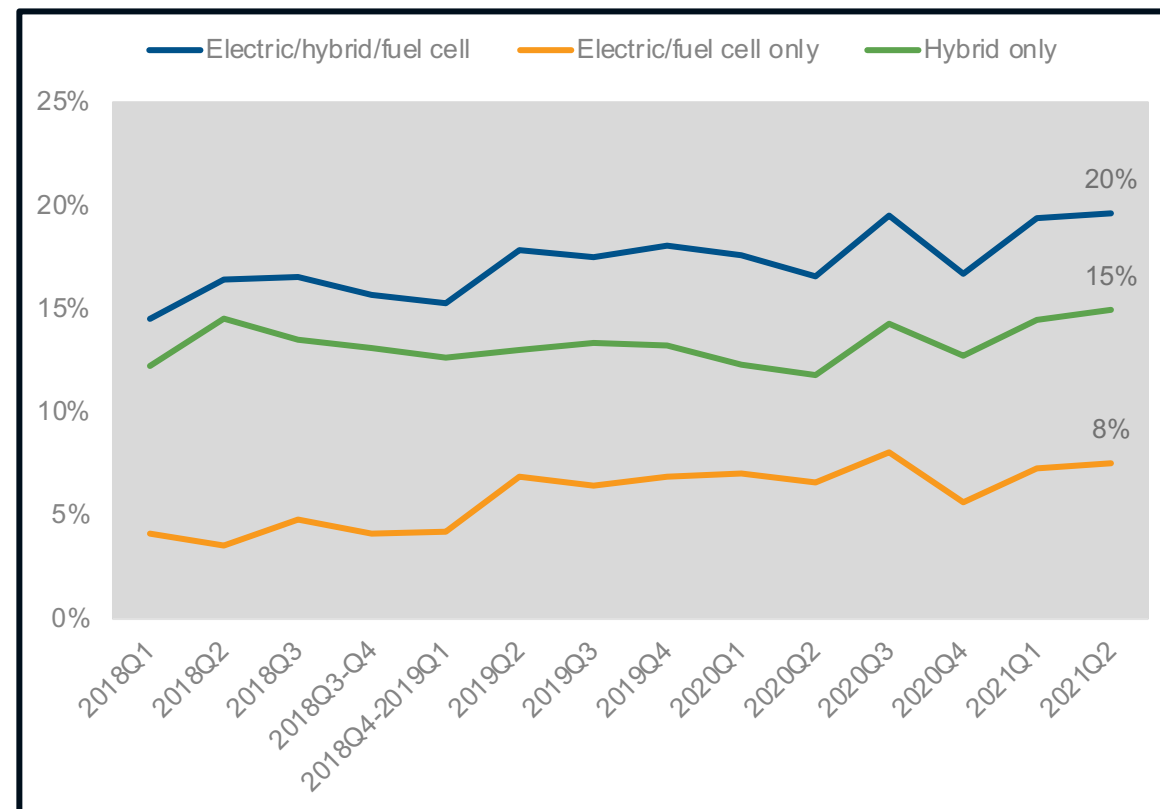
QUARTERLY TOP CONSIDERED ELECTRIFIED MODELS

* New to Top 10



(*new models vs. Q1 2021)

Overall Quarterly Consideration Trend

























TOP 10 CONSIDERED MODELS: NON-LUXURY SHOPPERS

The Top 10 list remained a good mix of trucks, SUVs and sedans as well as domestic and import brands. Ford and Toyota led brands with 3 models each in the top 10. Toyota Camry and Ford Explorer reappeared in the Top 10 for the first time since last year.

TOP 10 MODELS

* New to Top 10

#1	#2	#3	#4	#5
				
 F-150 Fullsize Truck	 Silverado 1500 Fullsize Truck	 CR-V Compact SUV	 RAV4 Compact SUV	 Outback Midsize SUV

#6	#7	#7	#8	#8	#8
					
 F-250/F-350/F-450 Fullsize Truck	 Accord Midsize Car	 Tacoma Midsize Truck	 Explorer* Midsize SUV	 Forester Compact SUV	 Camry* Midsize Car

TOP 10 IN Q2-21





































Pickups Gained Traction

- Pickup consideration expanded, driven by SUV shoppers searching for alternatives, booming construction and housing starts and home DIY projects.
- Pickup trucks dominated the first and second spots with Ford F-150 leading again for sixth straight quarter and Chevrolet Silverado's rapid climb in consideration.

(*new models vs. Q1 2021)

FACTORS DRIVING NON-LUXURY CONSIDERATION

Factors rankings remained very similar over the past five years. However, Affordability and Fuel Efficiency became less important over time while all other factors (aside from Safety and Prestige/Sophistication) have become more important to the Non-Luxury shopper.

RANK		FACTOR	IMPORTANCE	TOP RANKED BRAND	#2	#3
Q2-16	Q2-21					
1	1	Durability/Reliability	82%▲			
2	2	Safety	71%			
4	3	Driving Comfort	65%▲			
3	4	Affordability	59%▼			
5	5	Driving Performance	57%▲			
7	6	Reputation	51%▲			
6	7	Fuel Efficiency	44%▼			
8	8	Interior Layout	41%▲			
9	9	Technology	37%▲			
10	10	Exterior Styling	35%▲			
11	11	Ruggedness	31%▲			
12	12	Prestige/Sophistication	11%			

Ram Topped the Leaderboard Again

- For the second straight quarters, Ram took the most top honors -for Driving Performance, Interior Layout, Technology, Exterior Styling and Ruggedness.
 - Ram perform well when pickups are hot.
 - Stellantis revealed its Ram 1500 TRX (Hennessey Mammoth), which can be transformed to a 3-row SUV. Consumers gave it a nod for performance, style and versatility.
 - Ram made upgrades to its infotainment system, elevate its technology image.

GMC's Refinement Landed 2 Category Wins

- For the first time in two years, GMC took two top spots – Driving Comfort and Prestige. It also garnered the No. 2 spot for both Exterior Styling and Interior Layout. Its premium styling cues and cut-above capabilities influenced the rankings.

▲ ▼ indicate significant % change from Q2-16 vs. Q2-21

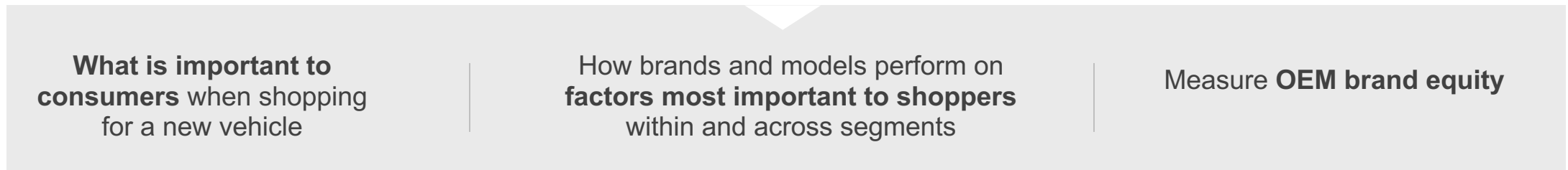
WHAT IS BRAND WATCH™ ?

Brand Watch, a **shopper perception study**, reveals trends in **vehicle consideration** among new car consumers and **factors that influence purchase decisions**.



WHAT CAN BRAND WATCH™ DO?

Support the Cox Auto sales team and clients in strategizing vehicle launch plans and key messaging





BRAND WATCH TOPLINE

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