



# BRAND WATCH

## NON-LUXURY SEGMENT TOPLINE REPORT

1<sup>st</sup> Quarter 2022



# 2022 BRAND WATCH METHODOLOGY EVOLUTION

## The Inclusion of Mobile and Desktop Users

Cox Automotive is always striving to improve the fundamentals behind our KBB Brand Watch Study. Established in 2007, the study has evolved over the years to reflect changes in the market. Our most recent change helps better reflect the growing reliance of shoppers on their mobile devices. In keeping up with this evolution, **as of January 1, 2022, Cox Automotive started surveying both mobile and desktop users** for the Brand Watch Study.

## The Impact

The new sampling of both mobile and desktop users will provide a better response rate and a more diverse group of respondents.

# BRAND WATCH Q1 2022 KEY TAKEAWAYS



## Dodge Purchase Consideration Doubled

Purchase intentions for Durango skyrocketed by nearly 200% since Q4 2021; Challenger and Charger consideration also jumped.



## Ram on Winning Streak

Ram achieved top honors for 5 factors: Safety, Driving Comfort, Interior Layout, Technology, and Ruggedness.



## Chevrolet Closing Gap with Top Contenders

Chevrolet consideration grew by a whopping 5 points in Q1. The brand has the potential to overtake Ford and Toyota in rankings.

*Starting in January 2022, both Mobile and Desktop users are included in the BW results. Prior to 2022, results were based on Desktop users only.*

# BRAND WATCH: NON-LUXURY CONSIDERATION

Toyota garnered a 2-point increase and took back the No. 1 spot from Ford for most considered non-luxury brand in Q1. Chevrolet is *the* brand to watch as it achieved a whopping 5-point lift. Demand for the Silverado 1500/2500/3500 and Tahoe helped Chevrolet reach the No. 3 spot. The excitement generated from the electric Silverado announcement also helped momentum.

## Toyota Rebounded Back on Top

- Consideration for Camry, Camry Hybrid and Toyota Highlander soared, which returned Toyota to the top of the leaderboard. These gains balanced out consideration declines for RAV4 and Tacoma.

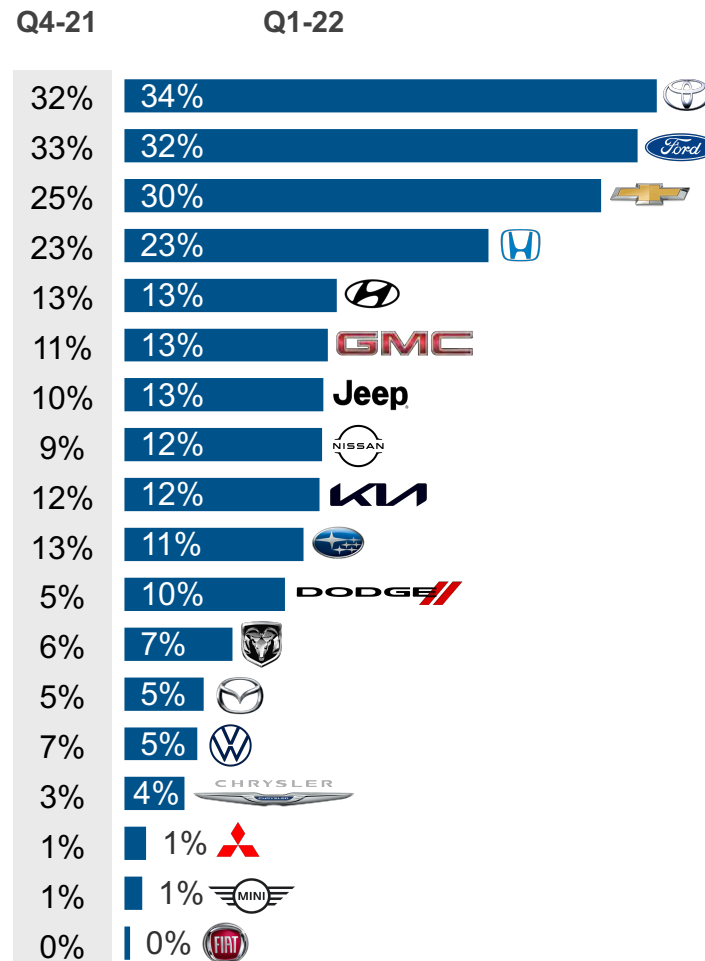
## Ford Lost Some Steam

- Ford was not able to maintain its No. 1 lead from Q4 2021. F-150 consideration softened and was overtaken by Silverado as the top considered model.

## Chevy and Dodge were Biggest Gainers

- Silverado consideration strengthened; Tahoe and the Silverado 2500/3500 pulled ahead and landed in the Top 10 for the first time.
- Consideration for Dodge doubled since Q4, driven by upticks in interest for the Durango, Charger and Challenger.

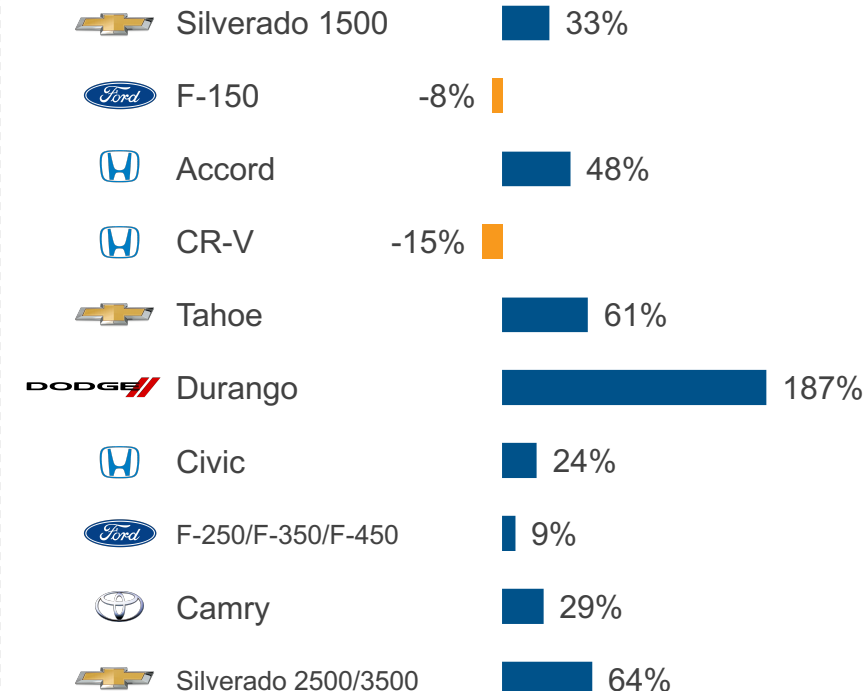
### QUARTERLY BRAND CONSIDERATION



### QUARTERLY CONSIDERATION GROWTH

#### TOP 10 MODELS

#### Q1-22 vs. Q4-21



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# A CLOSER LOOK: NON-LUXURY SEGMENT CONSIDERATION

Pickup and SUV consideration held steady. Car consideration spiked by 6 points in Q1, with Honda and Dodge models dominating the Top 5 Car list. The lift in Car demand may be due to rising fuel prices, worsening affordability challenges and inventory constraints.

## QUARTERLY SEGMENT CONSIDERATION

**66%**   
**SUVS**

Last Qtr.	Last Year
<b>66%</b>	<b>67%</b>

**37%**   
**CARS**

Last Qtr.	Last Year
<b>31% ▼</b>	<b>33% ▼</b>






**35%**   
**PICKUPS**

Last Qtr.	Last Year
<b>35%</b>	<b>29% ▼</b>





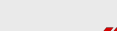
**5%**   
**MINIVANS**

Last Qtr.	Last Year
<b>4%</b>	<b>6% ▲</b>

### TOP 5 SUVs

- #1  CR-V
- #2  Tahoe
- #3  Durango
- #4  RAV4
- #5  Highlander






### TOP 5 CARS

- #1  Accord
- #2  Civic
- #3  Camry
- #4  Charger
- #5  Challenger

### TOP 5 PICKUPS

- #1  Silverado 1500
- #2  F-150
- #3  F-250/F-350/F-450
- #4  Silverado 2500/3500 HD
- #5  Tacoma

### TOP 5 MINIVANS

- #1  Sienna
- #2  Odyssey
- #3  Pacifica
- #4  Pacifica Hybrid
- #5  Voyager

### SUVs Consistently Strong

- Compact, Midsize and Full-size SUVs were represented in the Top 5.
- Domestic brands entered the list in Q1 with the Chevrolet Tahoe and Dodge Durango holding the No. 2 and 3 spots.

▲ ▼ indicate significant % change Q/Q

Last Qtr. = Q4-21, Last Year = Q1-21

Interpretation Example: 66% of non-luxury shoppers consider non-luxury SUVs











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# TOP 10 CONSIDERED ELECTRIFIED MODELS & OVERALL CONSIDERATION

Consideration for electrified models tapered in Q1 with one-in-four shoppers intending to buy a hybrid, fuel cell or BEV. EV consideration will accelerate as new entrants hit showrooms, like Nissan Ariya, Toyota bZ4X, Subaru Solterra, Chevrolet Silverado Electric, GMC Sierra Electric, RAM 1500 Electric, and more.

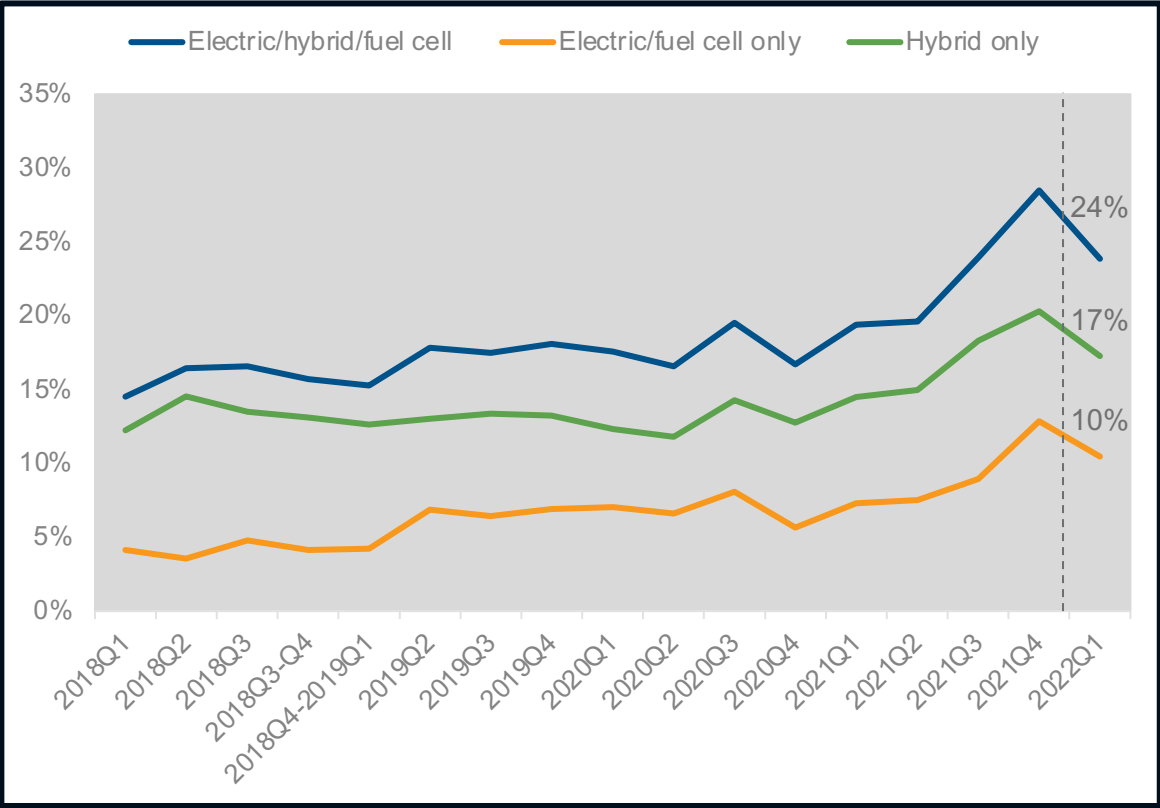
## QUARTERLY TOP CONSIDERED ELECTRIFIED MODELS

\* New to Top 10

#1	#2	#3	#4	#5
 RAV4 Hybrid Compact SUV	 Maverick Hybrid Compact Truck	 Model 3 Entry Luxury Car	 Model Y Luxury SUV	 CR-V Hybrid Compact SUV
#6	#7	#8	#9	#10
 Highlander Hybrid Midsize SUV	 F-150 Lightning Fullsize Truck	 Camry Hybrid* Midsize Car	 Mustang Mach-E Midsize SUV	 Model S* Luxury Car

(\*new models vs. Q4 2021)

## Overall Quarterly Consideration Trend

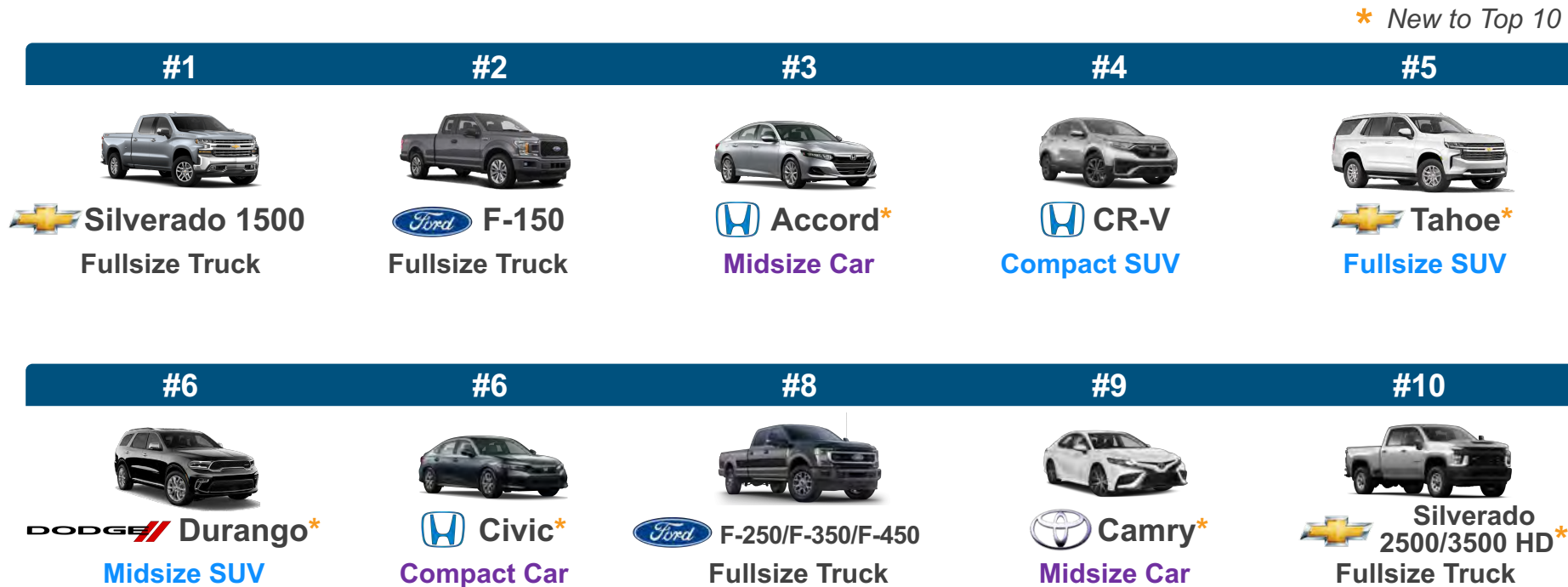


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# TOP 10 CONSIDERED MODELS: NON-LUXURY SHOPPERS

Macroeconomic factors and inventory challenges diversified shoppers' consideration set. In Q1, 6 new vehicles debuted in the top 10 most-considered non-luxury list with a good mix of pickup trucks, sedans and SUVs of varying sizes. Chevrolet and Honda vehicles were most represented.

## TOP 10 MODELS



(\*new models vs. Q4 2021)

### TOP 10 IN Q1-22

#### Trucks Dominated

- Pickup trucks occupied 4 spots in the top 10 with Chevrolet Silverado leading for the first time.





































#### Cars Made Comeback

- For the first time since Q3 2019, Honda Accord, Honda Civic and Toyota Camry made a comeback to the top 10 list.

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# FACTORS DRIVING NON-LUXURY CONSIDERATION

The factors rankings have remained nearly unchanged among Non-luxury shoppers over the past 5 years. However, the majority of the factors have become more important to shoppers, including fuel efficiency, driving comfort and driving performance.

RANK		FACTOR	IMPORTANCE	TOP RANKED BRAND	#2	#3
Q1-17	Q1-22					
1	1	Durability/reliability	81%			
2	2	Safety	69%			
3	3	Affordability	63%			
4	4	Driving comfort	61%▲			
5	5	Driving performance	60%▲			
7	6	Fuel efficiency	52%▲			
6	7	Reputation	48%			
8	8	Interior layout	40%▲			
9	9	Technology	37%▲			
10	10	Exterior styling	34%▲			
11	11	Ruggedness	31%▲			
12	12	Prestige/sophistication	15%▲			

## Ram on Winning Streak for Past Year

- Ram achieved top honors for 5 factors in Q1: Safety, Driving Comfort, Interior Layout, Technology, and Ruggedness. It ranked in 10 of the 12 factors
- Subaru lost top honors in Safety to Ram in Q1. Competition intensified as more OEMs made advancements in safety features. Ram's superior safety perceptions were backed by Ram 1500's 2022 Top Safety Pick Award from IIHS.

## Dodge Made Lasting Impressions

- Dodge maintained the No. 1 spot for Driving Performance and Exterior Styling, likely driven by its ad campaign focused on these attributes and high ratings for the Challenger and Charger. For the first time, Dodge took top honors for Prestige/Sophistication

▲ ▼ indicate significant % change from Q1-17 vs. Q1-22

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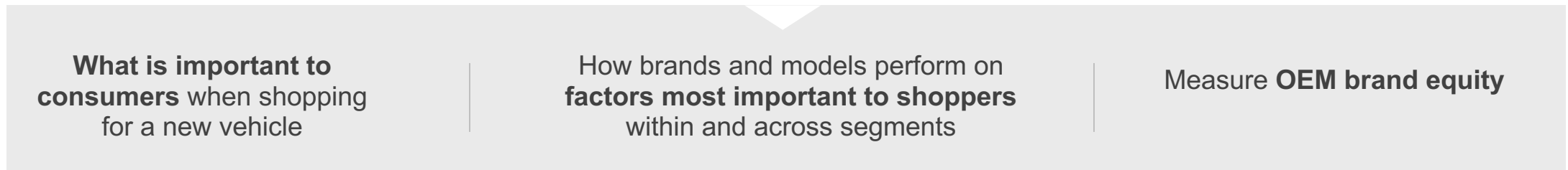
# WHAT IS BRAND WATCH™ ?

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



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# BRAND WATCH TOPLINE

**For all sales or client success inquiries, please contact:**  
OEM Sales Analytics Consulting  
[kbb.SA-OEMConsulting@coxautoinc.com](mailto:kbb.SA-OEMConsulting@coxautoinc.com)

**For all other inquiries, please contact:**  
[Vanessa.Ton@coxautoinc.com](mailto:Vanessa.Ton@coxautoinc.com)

