



# BRAND WATCH

## NON-LUXURY SEGMENT TOPLINE REPORT

4<sup>th</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 Q4 2022 KEY TAKEAWAYS



## GMC Hit All-Time High Consideration

Consideration for GMC improved 2 points, reaching an all-time high. The Sierra 1500 gained the most, making it the 5<sup>th</sup> most considered model, the highest ranking it has ever achieved.



## Trucks Dominated the Top 10 List

Most vehicles on the top 10 non-luxury considered list were pickup trucks. Truck was the only segment that gained in consideration in the fourth quarter.



## Chrysler Achieved Most Wins for First Time

Chrysler took top honors for 4 factors - Affordability, Driving Comfort, Interior Layout and Prestige/Sophistication. All three Chrysler models – 300, Pacifica, Pacifica Hybrid – significantly improved across these measures since Q3.

*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

Most brands saw a downturn in consideration or held steady. The only gainers were GMC, Chevrolet, Dodge and Mitsubishi. Chevrolet and GMC were driven by pick-ups. Dodge and Mitsubishi were fueled by consideration for the Dodge Durango and Mitsubishi Outlander and Mirage.

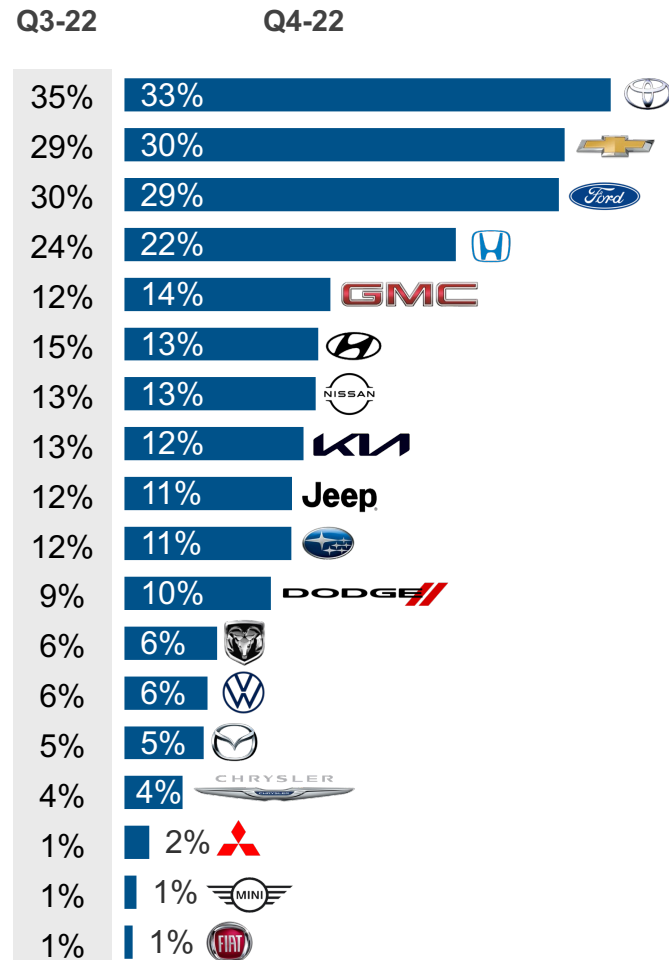
## Toyota, Honda Keep #1 and #4 Spots Despite Weaker Consideration

- Both powerhouse Japanese brands slipped by 2 points but remained highly ranked.
- Toyota was the most considered non-luxury brand for the 4<sup>th</sup> consecutive quarter. It lost some traction with the RAV4 and RAV4 Hybrid, which dropped off the top 10 list. Camry consideration softened; Tacoma gained momentum.
- Honda's consideration decline was due to waning interest in Civic and Accord. CR-V had an uptick. Honda should rebound when the all-new 2023 Honda Accord arrives.

## GMC Consideration Hit All-Time High

- GMC consideration improved by 2 points, making it the 5<sup>th</sup> most considered non-luxury brand on significant growth in Sierra 1500 consideration.

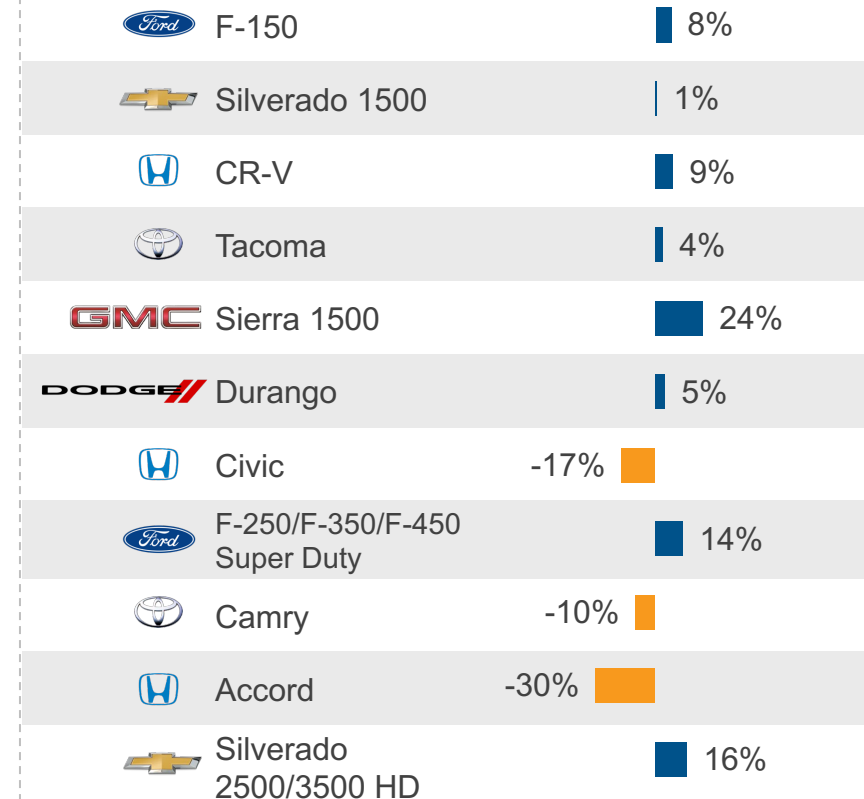
### QUARTERLY BRAND CONSIDERATION



### QUARTERLY CONSIDERATION GROWTH

#### TOP 10 MODELS

#### Q4-22 vs. Q3-22



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# A CLOSER LOOK: NON-LUXURY SEGMENT CONSIDERATION

Fuel prices fell in Q4 and so did car consideration, though still higher than in Q4 2021. Pickup consideration climbed by 1 point.  
Consideration for SUVs and minivans held steady.

## QUARTERLY SEGMENT CONSIDERATION

**67%**   
**SUVS**

Last Qtr.	Last Year
67%	66%

**36%**   
**CARS**

Last Qtr.	Last Year
40%▲	31%▼






**33%**   
**PICKUPS**

Last Qtr.	Last Year
32%	35%▲






**5%**   
**MINIVANS**

Last Qtr.	Last Year
5%	4%

### TOP 5 SUVs

- #1  CR-V
- #2  Durango
- #3  RAV4
- #3  RAV4 Hybrid
- #5  Outback






### TOP 5 CARS

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

### TOP 5 PICKUPS

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

### TOP 5 MINIVANS

- #1  Odyssey
- #2  Pacifica
- #3  Sienna
- #4  Pacifica Hybrid
- #5  Carnival MPV

### Honda Civic Rebounded to #1

- Honda Civic climbed back to the No. 1 spot in Car consideration after holding the No. 2 position for a year.
- Dodge Challenger made the top 5 list, edging out Toyota Corolla.

### SUV Consideration Stayed High

- For the first time in a year, Subaru Outback returned to the top 5 non-luxury SUV list, edging out Chevrolet Tahoe.
- Dodge Durango gained momentum, moving up three spots since Q3. There has been sell-down incentives on the Durango.

▲ ▼ indicate significant % change Q/Q

Last Qtr. = Q3-22, Last Year = Q4-21

Interpretation Example: 67% of non-luxury shoppers consider non-luxury SUVs

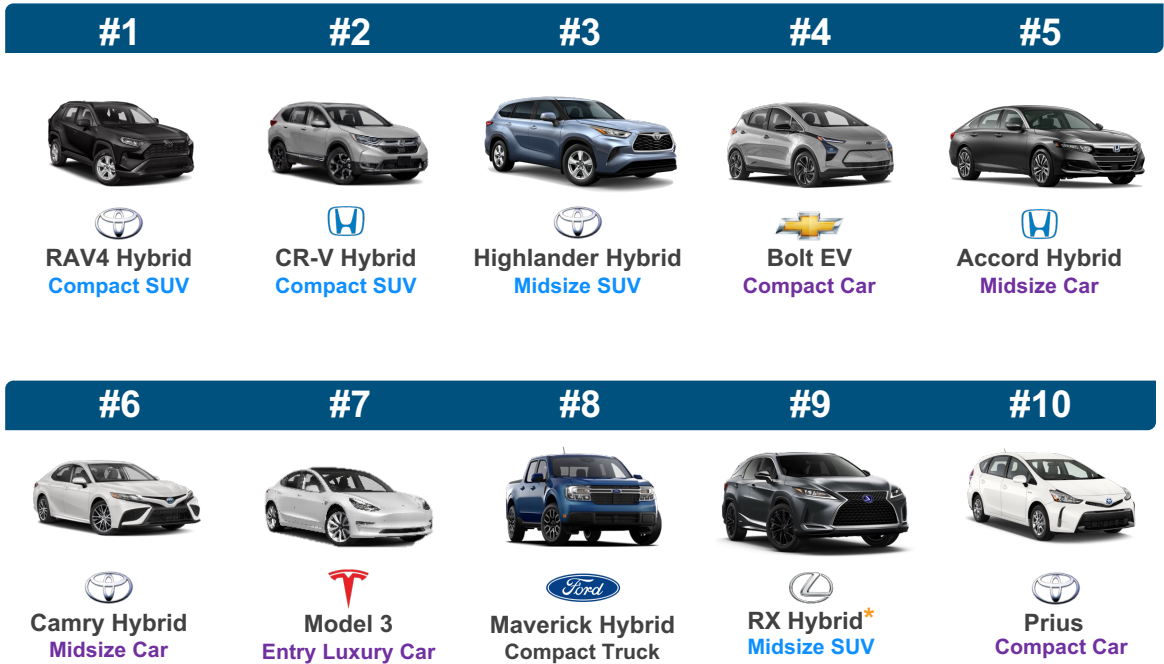
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# TOP 10 CONSIDERED ELECTRIFIED MODELS & OVERALL CONSIDERATION

Falling gas prices likely triggered the slip in electrified vehicle consideration. Lexus RX Hybrid joined the Top 10 electrified list. Ford F-150 Lightning dropped off the list as Ford is no longer taking reservations. Tesla Model 3 fell to No. 7 from No.3. Chevrolet Bolt moved up 6 spots.

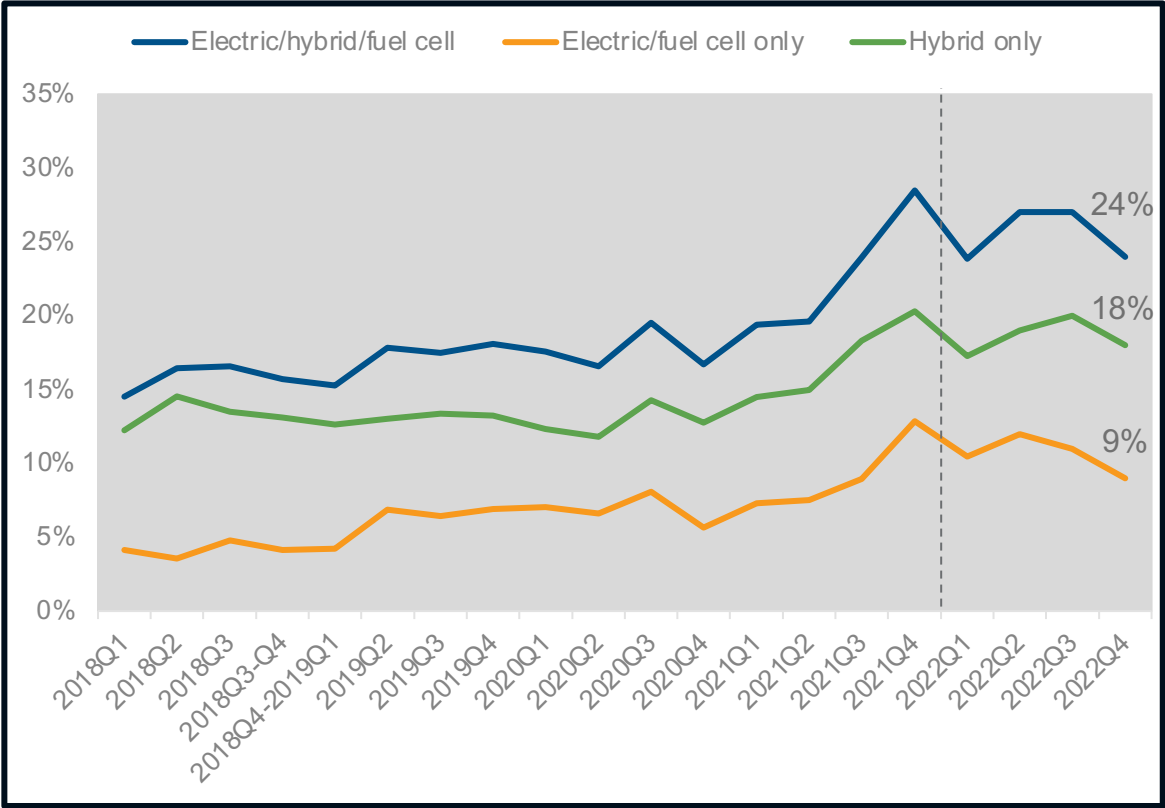
## QUARTERLY TOP CONSIDERED ELECTRIFIED MODELS

\* New to Top 10



(\*new models vs. Q3 2022)

## Overall Quarterly Consideration Trend

























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# TOP 10 CONSIDERED MODELS: NON-LUXURY SHOPPERS

Truck consideration increased, leading to trucks dominating the Top 10 most considered non-luxury vehicles list. Ford and Chevrolet each had two trucks on the list. GMC and Toyota each had one. Surprisingly, only 2 SUVs made the Top 10, likely due to supply constraints.

## TOP 10 MODELS

#1	#2	#3	#4	#5
  <b>F-150</b> Fullsize Truck	  <b>Silverado 1500</b> Fullsize Truck	  <b>CR-V</b> Compact SUV	  <b>Tacoma</b> Midsize Truck	  <b>Sierra 1500*</b> Fullsize Truck
#6	#6	#8	#9	#10
  <b>Durango*</b> Midsize SUV	  <b>Civic</b> Compact Car	  <b>F-250/F-350/F-450 Super Duty*</b> Fullsize Truck	  <b>Camry</b> Midsize Car	  <b>Accord</b> Midsize Car
				  <b>Silverado 2500/3500 HD*</b> Fullsize Truck

(\*new models vs. Q3 2022)





































### Ford F-150 Stayed on Top

- For the 2nd consecutive quarter, Ford F-150 was the most considered non-luxury model. F-Series heavy-duty trucks moved to the Top 10 after being absent in Q3.

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# FACTORS DRIVING NON-LUXURY CONSIDERATION

Factors rankings have remained unchanged over the last 5 years aside from a swap between fuel efficiency and reputation. Driving Performance, Fuel Efficiency, Interior Layout, Technology, Exterior Styling, Ruggedness, and Prestige/Sophistication have become more important to shoppers over time.

RANK		FACTOR	IMPORTANCE	TOP RANKED BRAND	#2	#3
Q4-17	Q4-22					
1	1	Durability/reliability	81% ▼			
2	2	Safety	70%			
3	3	Affordability	64%			
4	4	Driving comfort	62%			
5	5	Driving performance	59% ▲			
7	6	Fuel efficiency	53% ▲			
6	7	Reputation	50%			
8	8	Interior layout	39% ▲			
9	9	Technology	36% ▲			
10	10	Exterior styling	35% ▲			
11	11	Ruggedness	33% ▲			
12	12	Prestige/sophistication	15% ▲			

▲ ▼ indicate significant % change from Q4-17 vs. Q4-22

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## Chrysler Achieved Top Rank in 4 Categories for First Time

- Chrysler took home four top honors: Affordability, Driving Comfort, Interior Layout, and Prestige/Sophistication. All three Chrysler models – 300, Pacifica, Pacifica Hybrid – significantly improved across these measures since Q3.
- Chrysler soared, likely impacted by Pacifica's win as IIHS Top Safety Pick+. It has industry leading safety and security features.
- The Pacifica has been named perfect vehicle to celebrate National Dog Day by Autotrader many times.

## Ram Lost Some Steam

- Ram lost its lead in Driving Comfort, Driving Performance, Interior Layout, Exterior Styling and Prestige/Sophistication to other Stellantis brands – Chrysler and Dodge.
- Ram still topped the leaderboard for Technology and Ruggedness.



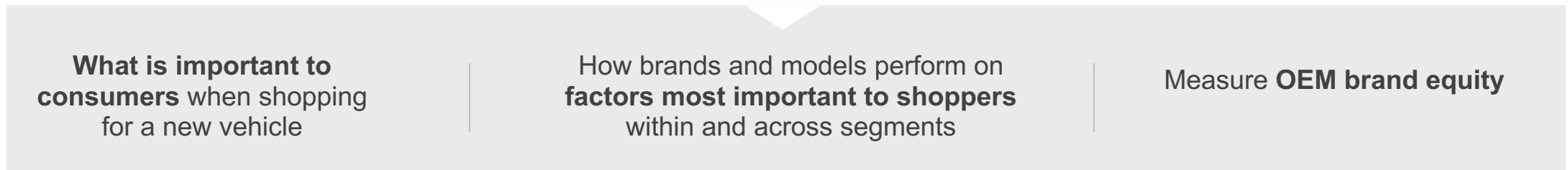
# WHAT IS BRAND WATCH™ ?

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

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