



BRAND WATCH

LUXURY SEGMENT TOPLINE REPORT
H1 2026



Cox AUTOMOTIVE
Research & Market Intelligence

BRAND WATCH H1 2026 KEY TAKEAWAYS



Audi Stands Out in Consideration

Audi was the only Top 10 Luxury brand to improve in H1 2026, with consideration for the A3 and A5 doubling from H2 2025.



SUV Consideration Reached a New High

Luxury SUV consideration increased to a record 79%, up 2 points from H2 2025 and 4 points year over year, further widening the gap between SUVs and luxury cars.



Lexus and Lincoln Tied for Most Wins

Lexus ranked No. 1 for Durability/Reliability, Reputation and Technology, while Lincoln led in Driving Comfort, Affordability and Interior Layout.

BRAND WATCH: LUXURY CONSIDERATION

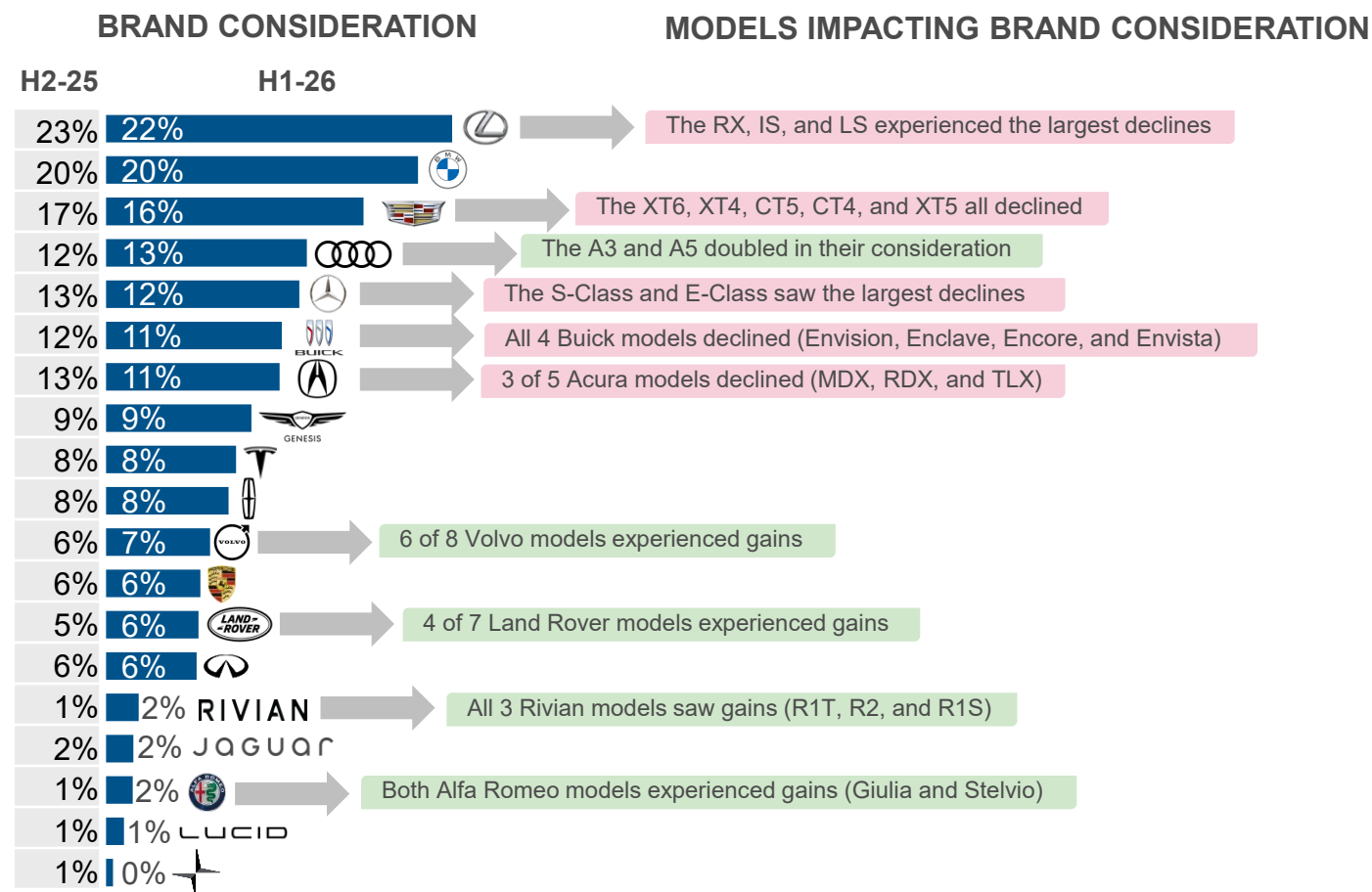
Most Luxury brands were stable or declined in H1 2026. Audi was the only Top 10 brand to gain consideration, while Lexus, Cadillac, Mercedes-Benz, Buick, and Acura lost ground. Acura lost the most momentum. Despite a 1-point decline, Lexus is the most considered Luxury brand for the 5th consecutive wave, driven primarily by the RX, IS, and LS.

Audi: Only Top 10 Brand to Gain Traction

- Audi was the only Top 10 Luxury brand to improve in H1 2026, with consideration for the A3 and A5 doubling from H2 2025.
- Audi's purchase consideration jump is consistent with sales: Audi's only US bright spots in H1 were its sedans (A3, A5),

Volvo, Land Rover, Rivian, and Alfa Romeo Ramped Up in Consideration

- Volvo (6 of 8 models), Land Rover (4 of 7 models), Rivian (all 3 models), and Alfa Romeo (2 models) saw growth in consideration – pointing to rising interest in rugged-luxury and EV-native challengers.



A CLOSER LOOK: LUXURY SEGMENT CONSIDERATION

Luxury SUV consideration hit an all-time high, while Luxury car consideration fell to a record low. The Cadillac Escalade reclaimed the No. 1 SUV position, while the Cadillac CT5 slipped to No. 3 among Luxury cars, behind the BMW 3 Series and 5 Series.

SEGMENT CONSIDERATION

79%



LUXURY SUVs

H2 2025	H1 2025
77%	75%▼

TOP 5 LUXURY SUVs

- #1  Escalade
- #2  Enclave
- #3  Model Y
- #3  MDX
- #5  X5

39%



LUXURY CARS

H2 2025	H1 2025
42%▲	44%▲

TOP 5 LUXURY CARS

- #1  3 Series
- #2  5 Series
- #3  CT5
- #4  A5
- #5  Model 3

Luxury SUV Consideration Climbed to a Record High

- Consideration for luxury SUVs reached 79%, increasing 2 points from H2 2025 and 4 points year over year.
- The Cadillac Escalade reclaimed the No. 1 position, while the Lexus RX fell out of the Top 5.
- SUVs now command about 55% to 58% of the North American luxury market, and luxury buyers aren't trading down – loyalty is high (luxury buyers are buying luxury brands again).

Luxury Car Consideration Reached a New Low

- Luxury car consideration declined to 39%, down 3 points from H2 2025 and 5 points year over year, continuing the long-term shift away from sedans.
- The BMW 3 Series is having a renaissance, up 32% in sales, which explains its consideration climb.
- The surviving luxury sedans that win are either driver's-brand halos (3 Series) or freshly redesigned value plays – a clear cue for OEM product and messaging strategy.

▲ ▼ indicate significant % change Wave/Wave

Last Wave = H2-25, Last Year = H1-25

Interpretation Example: 79% of luxury shoppers consider luxury SUVs

TOP 10 CONSIDERED MODELS: LUXURY SHOPPERS

SUVs continued to define the Luxury shopping landscape, accounting for 9 of the Top 10 most considered models. The Cadillac Escalade reclaimed the No. 1 position from the Lexus RX, while the BMW 3 Series was the only car represented.

TOP CONSIDERED MODELS

* New to Top 10

#1	#2	#3	#3	#5
 Escalade Luxury Fullsize SUV (+7%)	 Enclave Luxury Midsize SUV (-6%)	 Model Y Luxury Compact SUV (+3%)	 MDX Luxury Midsize SUV (-16%)	 X5 Luxury Midsize SUV (0%)
#6	#7	#8	#9	#10
 RX Luxury Midsize SUV (-27%)	 Encore Luxury Subcompact SUV (-6%)	 3 Series* Entry Luxury Car (+22%)	 GX* Luxury Midsize SUV (+9%)	 RDX Luxury Compact SUV (-8%)

TOP 10 IN H1 2026

- The BMW 3 Series and Lexus GX joined the top 10 list. The GX's entry reflects the surging rugged-luxury trend. The 3 Series' presence is its sales renaissance made visible.
- Two cars, the BMW 5 Series and the Cadillac CT5, fell off the Top 10 in H1 2026.

*new models vs. H2 2025
(Consideration growth: H1-26 vs. H2-25)

FACTORS DRIVING LUXURY CONSIDERATION

Affordability, fuel efficiency, ruggedness, and prestige/sophistication increased significantly in importance over the past 5 years for luxury vehicles. The affordability climb — even in luxury — is the tariff-and-price story hitting the premium tier: 25% import duties and 2026 price increases have made value a conscious consideration for affluent buyers.

RANK		FACTOR	IMPORTANCE	TOP RANKED BRAND	#2	#3
H1-21	H1-26					
1	1	Durability/reliability	79%			
2	2	Safety	72%			
3	3	Driving comfort	69%			
4	4	Driving performance	64%			
9	5	Affordability	53% ▲			
5	6	Reputation	52%			
6	7	Interior layout	48%			
10	8	Fuel efficiency	47% ▲			
8	9	Exterior styling	46%			
7	10	Technology	44%			
11	11	Ruggedness	26% ▲			
12	12	Prestige/sophistication	25% ▲			

▲ ▼ indicate significant % change from H1-21 vs. H1-26

Lexus & Lincoln Achieved 3 Top Rankings Each

- Lexus remained No. 1 in Durability/Reliability and Reputation and took the top spot for Technology from Tesla for the first time in H1 2026.
- In a value-conscious market, “trusted and hold its value” is the reputation shoppers gravitate towards – reinforcing Lexus’s No.1 finish in Reputation.
- Lexus’s own tech perception genuinely improved with the visible ES overhaul, with 14-inch screen, customizable widgets, a smarter “Hey Lexus” assistant, and 5G connectivity.
- Lincoln’s wins on Affordability, Driving Comfort, and Interior Layout map perfectly to its value-luxury, comfort-first positioning.

Porsche Earned 2 Top Honors

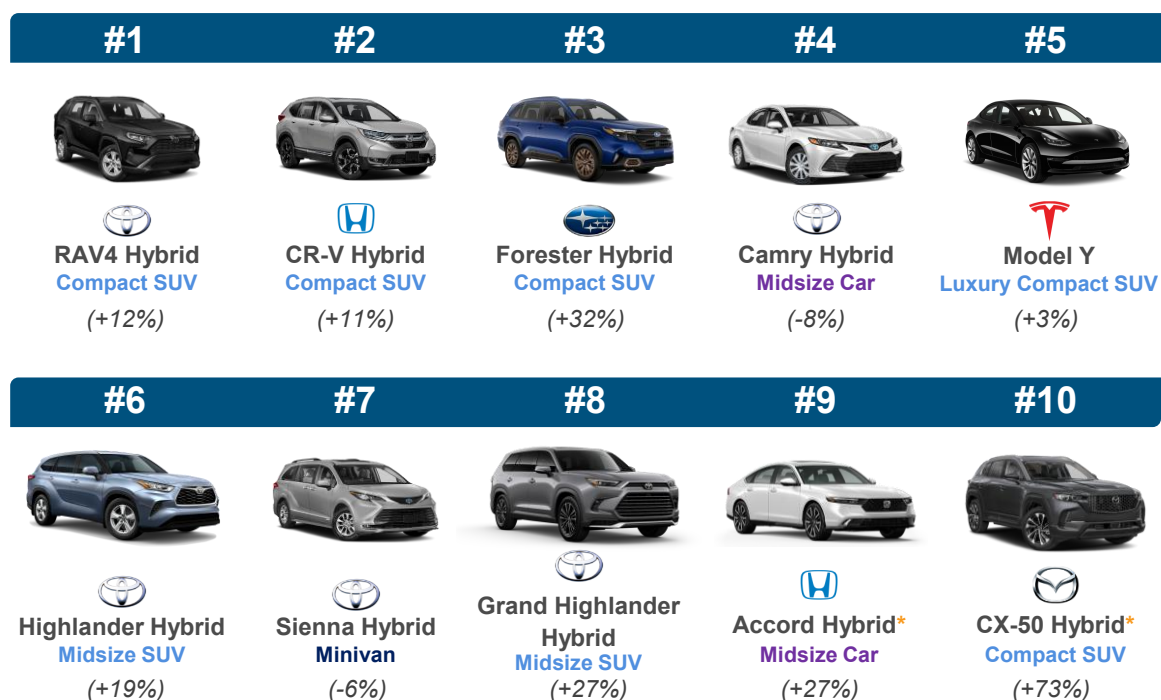
- Porsche maintained its lead in Exterior Styling and moved into the top position for Prestige/Sophistication, reinforcing the brand’s strength in design and aspirational appeal.

TOP 10 MOST CONSIDERED ELECTRIFIED MODELS & OVERALL CONSIDERATION

Hybrid consideration reached a new high, while EV-only consideration softened. Toyota placed 5 models in the Top 10 Electrified list, showing how breadth across hybrid cars, SUVs, and minivans continues to pay off. The Honda Accord Hybrid and Mazda CX-50 Hybrid joined the Top 10 in H1 2026.

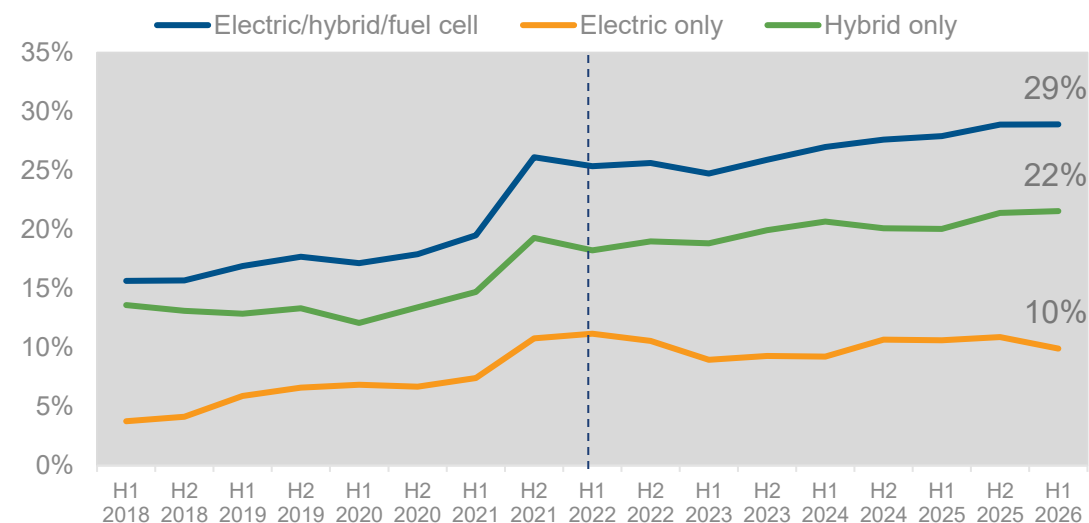
TOP CONSIDERED ELECTRIFIED MODELS

* New to Top 10



*new models vs. H2 2025
(Consideration growth: H1-26 vs. H2-25)

OVERALL CONSIDERATION TREND



TOP 5 Electrified Brands

1. Toyota
2. Honda
3. Hyundai
4. Tesla
5. Ford

FACTORS DRIVING CONSIDERATION FOR ELECTRIFIED BRANDS

Durability/reliability, safety, driving comfort, fuel efficiency, and affordability were the top drivers among Electrified shoppers.

RANK H1-26	FACTOR	IMPORTANCE	TOP RANKED BRAND	#2	#3
1	Durability/reliability	83%			
2	Safety	74%			
3	Driving comfort	68%			
4	Fuel efficiency	60%			
5	Affordability	60%			
6	Driving performance	60%			
7	Reputation	53%			
8	Interior layout	44%			
9	Technology	41%			
10	Exterior styling	36%			
11	Ruggedness	26%			
12	Prestige/sophistication	17%			

Lexus Celebrated 5 Victories

- Lexus led in 5 attributes, including Driving Comfort, Reputation, Interior Layout, Technology, and Exterior Styling, suggesting its electrified strength is rooted in refinement and perceived quality.
- The brand also had honorable mentions in Durability/Reliability, Safety, Prestige/Sophistication, Fuel Efficiency, and Driving Performance.

Honda Wins in 3 Categories

- Honda wins in Durability/Reliability, Fuel Efficiency, and Affordability, positioning the brand as a lower-risk choice for shoppers considering electrified options.
- Honda's quality and brand trust help drive their No. 2 ranking for Reputation.

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.

Brand Level Study
180,000+ interviews since 2007



BRAND WATCH™



Model Level Study
500,000+ interviews since 2012

Captures **brand and model consideration & familiarity** among new car shoppers

Tracks **12 factors important to shoppers** across all segments and models

Respondents are **in-market for a new vehicle** and recruited from KBB.com

WHAT CAN BRAND WATCH™ DO?

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

What is important to consumers when shopping for a new vehicle

How brands and models perform on **factors most important to shoppers** within and across segments

Measure **OEM brand equity**

BRAND WATCH METHODOLOGY



H1 2026 Survey

6,000+ Kelley Blue Book Shoppers

In-market, purchase intend within 12-month

The Inclusion of Mobile and Desktop Users

Cox Automotive strives to improve the fundamentals behind our KBB Brand Watch Study. Established in 2007, the study has evolved 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 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 provides a better response rate and a more diverse group of respondents.



BRAND WATCH TOPLINE

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