



BRAND WATCH

NON-LUXURY SEGMENT TOPLINE REPORT
H1 2026



Cox AUTOMOTIVE
Research & Market Intelligence

BRAND WATCH H1 2026 KEY TAKEAWAYS



Subaru and Kia Stand Out as the Only Gainers

Subaru and Kia were the only gainers in H1 2026. Subaru Crosstrek and Forester Hybrid consideration surged, while Kia gained on value-SUV strength and a higher demand for the Carnival minivan.



SUVs Hit a New High as Cars Reached a New Low

SUV consideration climbed to an all-time high of 71%, while car consideration fell to a record-low 25%, underscoring continued shopper migration toward utility, space, and perceived versatility.



Honda Celebrated 9 Victories

Honda led 9 of 12 consideration drivers, reinforcing its position as the trust/value benchmark for Non-Luxury shoppers.

BRAND WATCH: NON-LUXURY CONSIDERATION

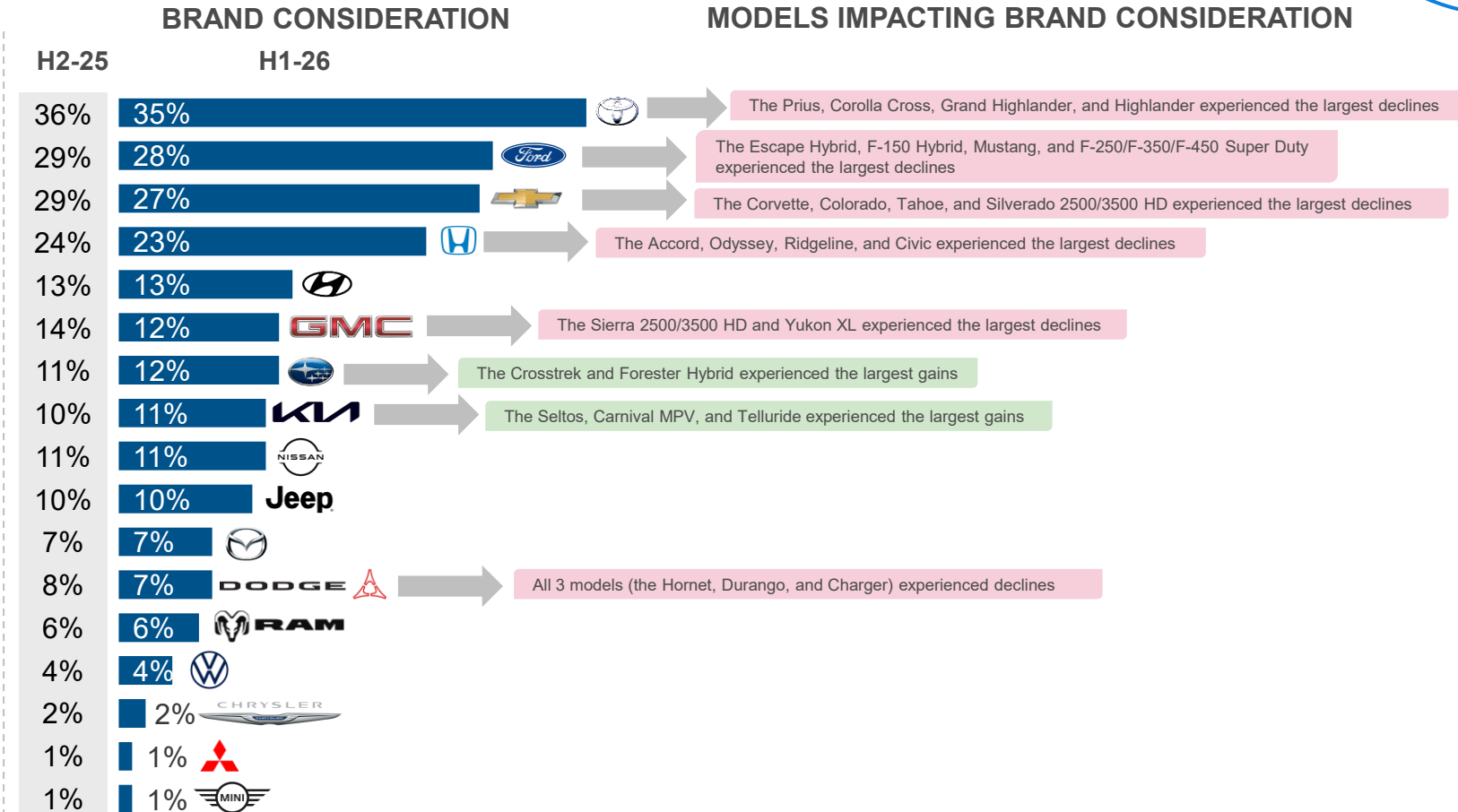
Most Non-Luxury brands were stable or down in H1 2026, with only Subaru and Kia gaining consideration, suggesting shoppers remain selective as affordability pressures continue to shape the market. Toyota remained the No. 1 considered Non-Luxury brand for the 16th consecutive wave, despite a 1-point dip. Toyota's strong SUV and hybrid lineup continues to sustain shopper interest.

GM Brands Cooled Most

- Chevrolet and GMC are each down by 2 points – tied directly to real-world softness in their pickup and large SUVs. Consideration for the iconic Corvette also softened.
- Chevrolet and GMC are likely to gain traction in the second half of 2026 as they launch their all-new Silverado and Sierra, respectively.

Subaru and Kia Were Biggest Gainers

- Subaru's momentum is unmistakable – June sales rose 18.1% with Forester up 43.6% and a best-ever June for Crosstrek, both riding new hybrids. Crosstrek and Forester Hybrid consideration surged since H2 2025.
- Kia gained on value-SUV strength and a higher demand for the Carnival minivan.



A CLOSER LOOK: NON-LUXURY SEGMENT CONSIDERATION

SUV consideration reached an all-time high. Meanwhile, Car consideration fell to a record low, down significantly from 2025. Pickup consideration declined by 1 point since H2 2025. Minivan consideration remained steady.

SEGMENT CONSIDERATION

71% 
SUVS

33% 
PICKUPS

25% 
CARS

5% 
MINIVANS

H2 2025	H1 2025
70%	69%▼

H2 2025	H1 2025
34%	33%

H2 2025	H1 2025
27%▲	30%▲

H2 2025	H1 2025
5%	5%

TOP 5 SUVs

TOP 5 PICKUPS

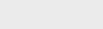
TOP 5 CARS

TOP 5 MINIVANS

#1		CR-V
#2		RAV4
#3		4Runner
#4		Explorer
#5		Pilot

#1		F-150
#2		Silverado 1500
#3		Sierra 1500
#4		1500
#5		Tacoma

#1		Camry
#2		Civic
#3		Accord
#4		Corolla
#5		Charger

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

▲ ▼ indicate significant % change Wave/Wave
Last Wave = H2-25, Last Year = H1-25
Interpretation Example: 70% of non-luxury shoppers consider non-luxury SUVs

SUVs Reached New Peak

- SUV consideration rose to 71%, a record, as shoppers continued favoring vehicles that deliver space, flexibility, and family utility.
- Toyota 4Runner and Honda Pilot joined the Top 5 list, displacing Chevrolet Tahoe and Dodge Durango, a shift mirrored in sales

Cars Fell to a Record Low

- Car consideration dropped to 25%, a new record low, reflecting multi-year pressure from shifting product investment, fewer sedan launches, and stronger SUV/pickup merchandising.

TOP 10 CONSIDERED MODELS: NON-LUXURY SHOPPERS

SUVs accounted for 5 of the Top 10 most considered models in H1 2026, while Pickups had 4 models on the list. Toyota led with 3 Top 10 models, while Ford and Honda each placed 2.

TOP 10 MODELS

* New to Top 10

#1	#2	#3	#4	#5
				
 F-150	 Silverado 1500	 CR-V	 RAV4	 4Runner*
Full-size Truck	Full-size Truck	Compact SUV	Compact SUV	Midsize SUV
(+9%)	(+5%)	(+2%)	(+2%)	(+20%)
#6	#7	#7	#9	#10
				
 Explorer	 Camry	 Pilot*	 Sierra 1500*	 RAM 1500*
Midsize SUV	Midsize Car	Midsize SUV	Full-size Truck	Full-size Truck
(-3%)	(-8%)	(+9%)	(-6%)	(+2%)

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

TOP 10 IN H1 2026

- The Toyota 4Runner, Honda Pilot, GMC Sierra 1500, and RAM 1500 all entered the Top 10 in H1 2026. That's a high 40% turnover in a single period, underscoring how fluid consideration has become.
- RAM 1500's entry tracks its real sales turnaround – RAM light-duty sales jumped in Q2, credited to the return of the HEMI V8.

FACTORS DRIVING NON-LUXURY CONSIDERATION

The importance of affordability, driving performance, fuel efficiency, and prestige/sophistication increased over the past 5 years, while durability/reliability declined slightly but remained the top factor.

RANK		FACTOR	IMPORTANCE	TOP RANKED BRAND	#2	#3
H1-21	H1-26					
1	1	Durability/reliability	81% ▼			
2	2	Safety	70%			
4	3	Affordability	64% ▲			
3	4	Driving comfort	63%			
5	5	Driving performance	59% ▲			
6	6	Reputation	52%			
7	7	Fuel efficiency	49% ▲			
8	8	Interior layout	41%			
10	9	Exterior styling	35%			
9	10	Technology	35%			
11	11	Ruggedness	30%			
12	12	Prestige/sophistication	15% ▲			

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

Honda Dominate in 9 Categories

- Honda led in 9 categories, Including four of the top 5 most important factors.
- Honda's near-sweep is the blueprint for success: own the fundamentals, and consideration follows.

Subaru, RAM, and Jeep Each Celebrated 1 Win

- Subaru led in Safety and 4 third place spots. Safety is on-brand with Subaru's marketing DNA.
- RAM ranked No. 1 for Exterior Styling. RAM has built its brand around bold, confident exteriors – a legacy that traces back to the 1994 redesign, whose upright grille and semi-truck-inspired stance turned a utilitarian segment into “a canvas for personality”
- Jeep took the top honors for Ruggedness. For most shoppers, Jeep is a synonym for rugged, off-road adventure and trail-conquering toughness.

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.

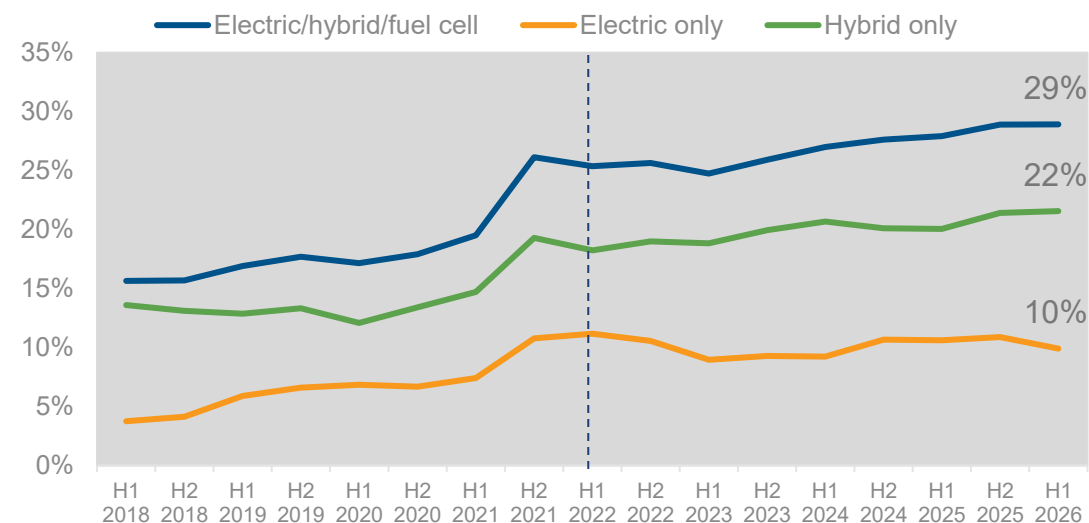
TOP CONSIDERED ELECTRIFIED MODELS

* 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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