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BrandWatch 2014Q4 Topline Report

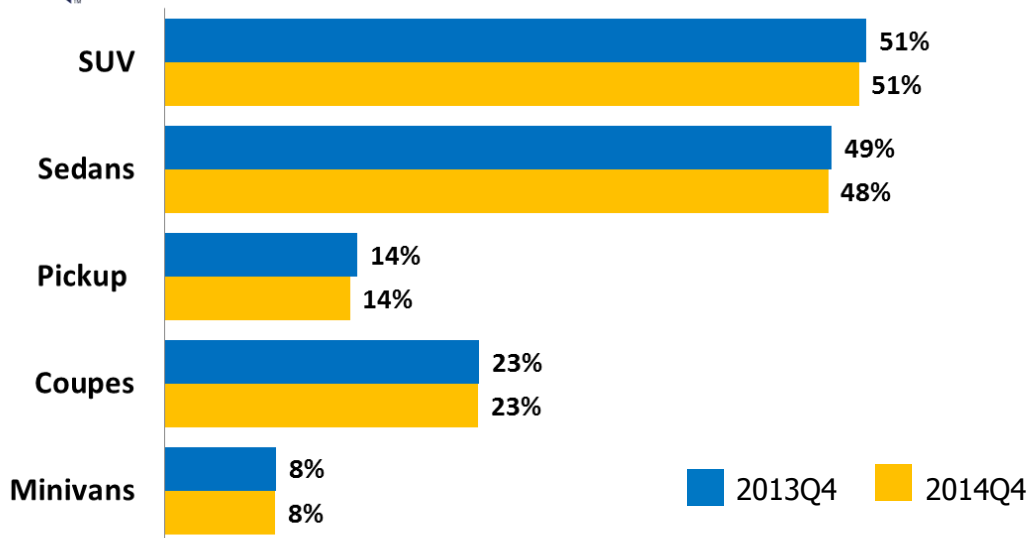


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Non-Luxury Vehicles



Non-Luxury Segment Consideration



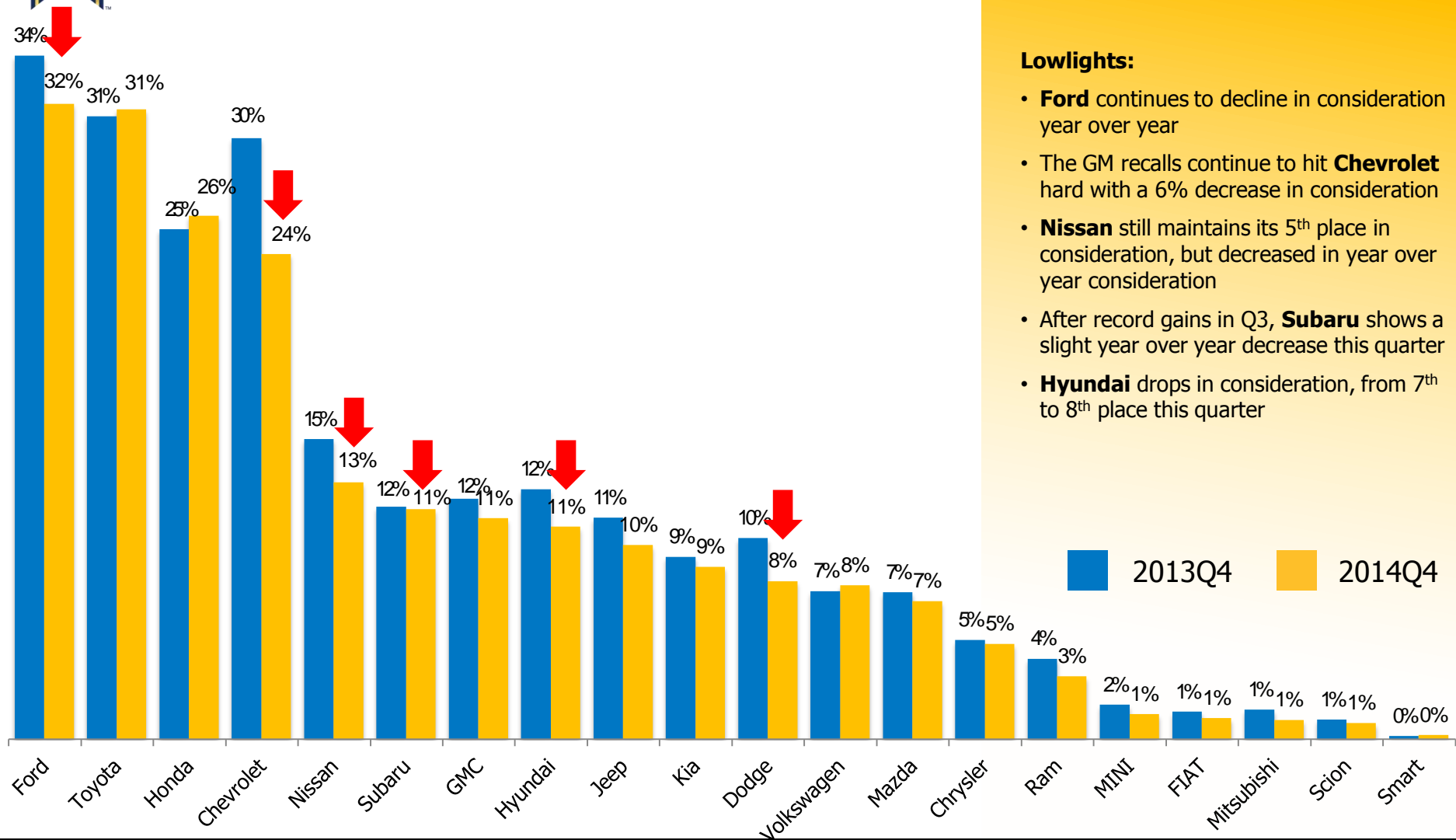
Segment	Last Year's Top Model (2013 Q4)	This Year's Top Model (2014 Q4)
SUV	Jeep Grand Cherokee	Honda CR-V
Sedan	Honda Accord	Toyota Camry
Pickup	Ford F150	Ford F150
Coupe	Ford Mustang	Ford Mustang
Minivan	Honda Odyssey	Honda Odyssey



Source: BrandWatch; All Non-Luxury Makes; 2013Q4 n=2043, 2014Q4 n=2396
 Q: Please select at most 5 vehicles that you are currently shopping.



Non-Luxury Brand Consideration



Lowlights:

- **Ford** continues to decline in consideration year over year
- The GM recalls continue to hit **Chevrolet** hard with a 6% decrease in consideration
- **Nissan** still maintains its 5th place in consideration, but decreased in year over year consideration
- After record gains in Q3, **Subaru** shows a slight year over year decrease this quarter
- **Hyundai** drops in consideration, from 7th to 8th place this quarter

Source: BrandWatch; All Non-Luxury Makes; 2013Q4 n=2043, 2014Q4 n=2396
 Q: Please select at most 5 vehicles that you are currently shopping.



Top 10 Considered Non-Luxury Vehicles

Top 10 Non Luxury Models		This Year 2014Q4	Last Year 2013Q4
Honda CR-V	↑	1	4
Ford F150	↓	2	1
Chevrolet Silverado 1500	↑	3	6
Toyota Camry	↑	4	5
Honda Accord Sedan	↓	5	3
Toyota RAV4	↑	6	10
Ford Escape	↑	7	9
Ford Explorer		8	8
Subaru Outback	↑	9	13
GMC Sierra 1500	↑	10	15

- **Honda CR-V** was the top considered model two quarters in a row
- **Chevrolet Silverado 1500** had a major lift in consideration from 6th to 3rd place
- **Jeep Grand Cherokee** dropped out of the top 10 list, after being #2 last year



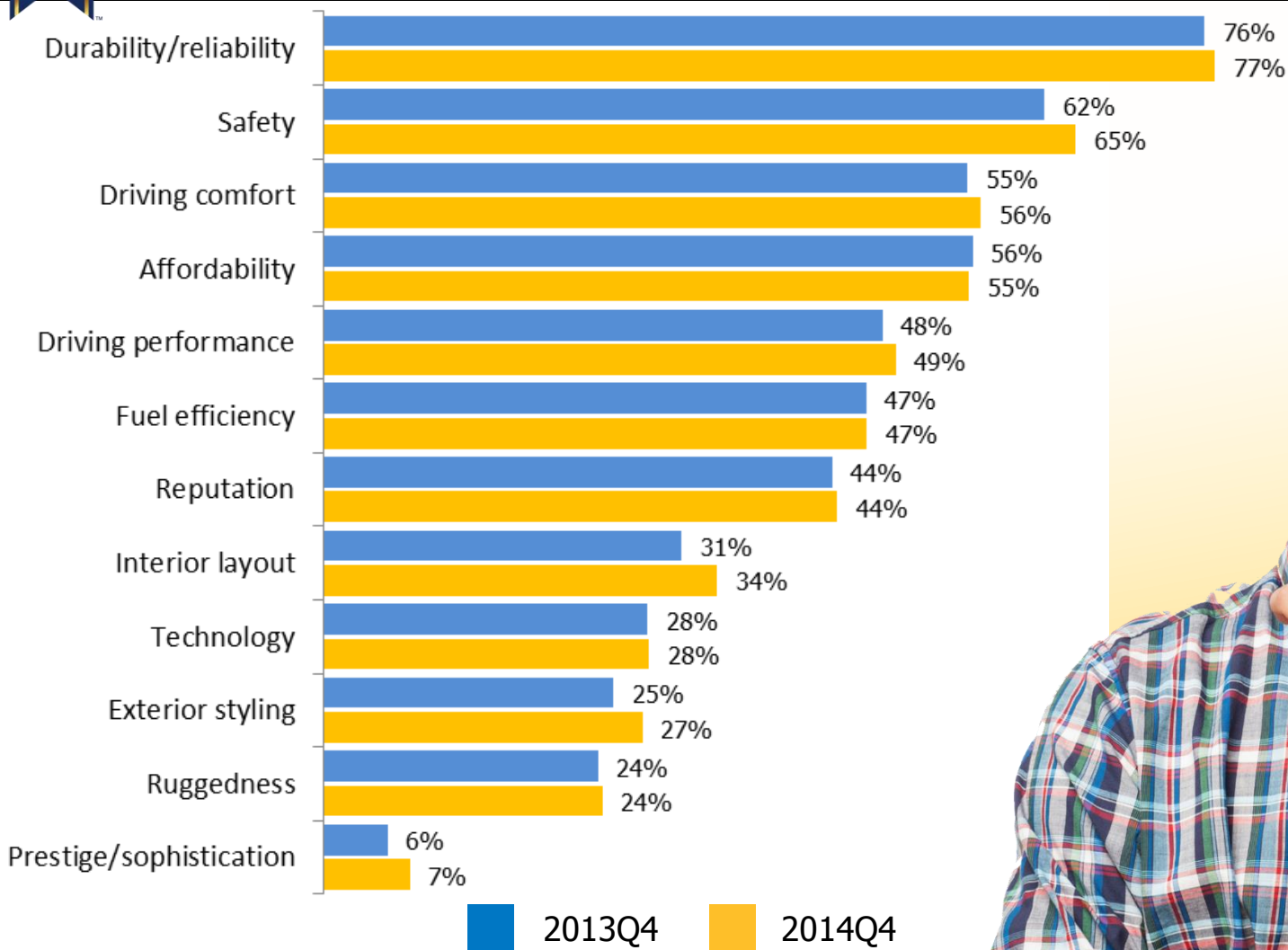
Source: BrandWatch; All Non-Luxury Makes; 2013Q4 n=2043, 2014Q4 n=2396

Q: Please select at most 5 vehicles that you are currently shopping.

Note: Arrows signify an increase or decrease in rank from 2013Q4 to 2014Q4



Factor Importance Non-Luxury Brands



Source: BrandWatch; All Non-Luxury Makes; 2013Q4 n=2043, 2014Q4 n=2396
Q: Please review the list below and rate how important are each of the factors to you in deciding on your next new car



Top Ranked Non-Luxury Brand For Each Factor of Importance

Factor	Top Ranked (2014 Q4)	Top Ranked (2013 Q4)
Durability/Reliability	Honda	Honda
Safety	Subaru	Subaru
Driving Comfort	GMC	GMC
Affordability	Scion	FIAT
Driving Performance	GMC	Subaru
Fuel Efficiency	Scion	FIAT
Reputation	Subaru	Honda
Interior Layout	Chrysler	Honda
*Technology	GMC	N/A
Exterior Styling	GMC	MINI
Ruggedness	Ram	Jeep
Prestige/Sophistication	GMC	FIAT

*Technology was new factor that was introduced in 2014



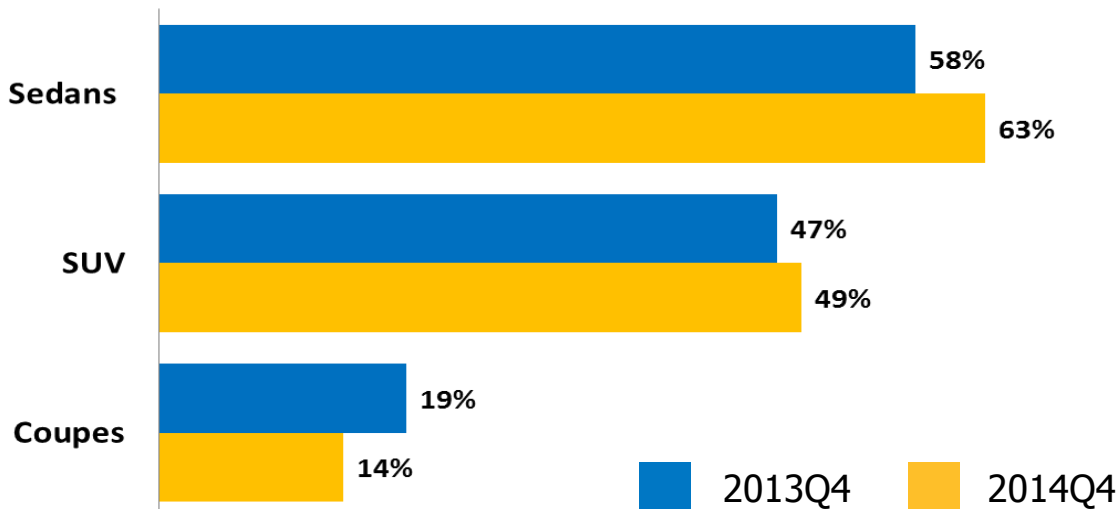


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Luxury Vehicles



Luxury Segment Consideration



Segment	Last Year's Top Model (2013 Q4)	This Year's Top Model (2014 Q4)
Sedan	BMW 3 Series	Cadillac CTS (4dr)
SUV	Lexus RX	Lexus RX
Coupe	Cadillac CTS Coupe	Cadillac CTS Coupe

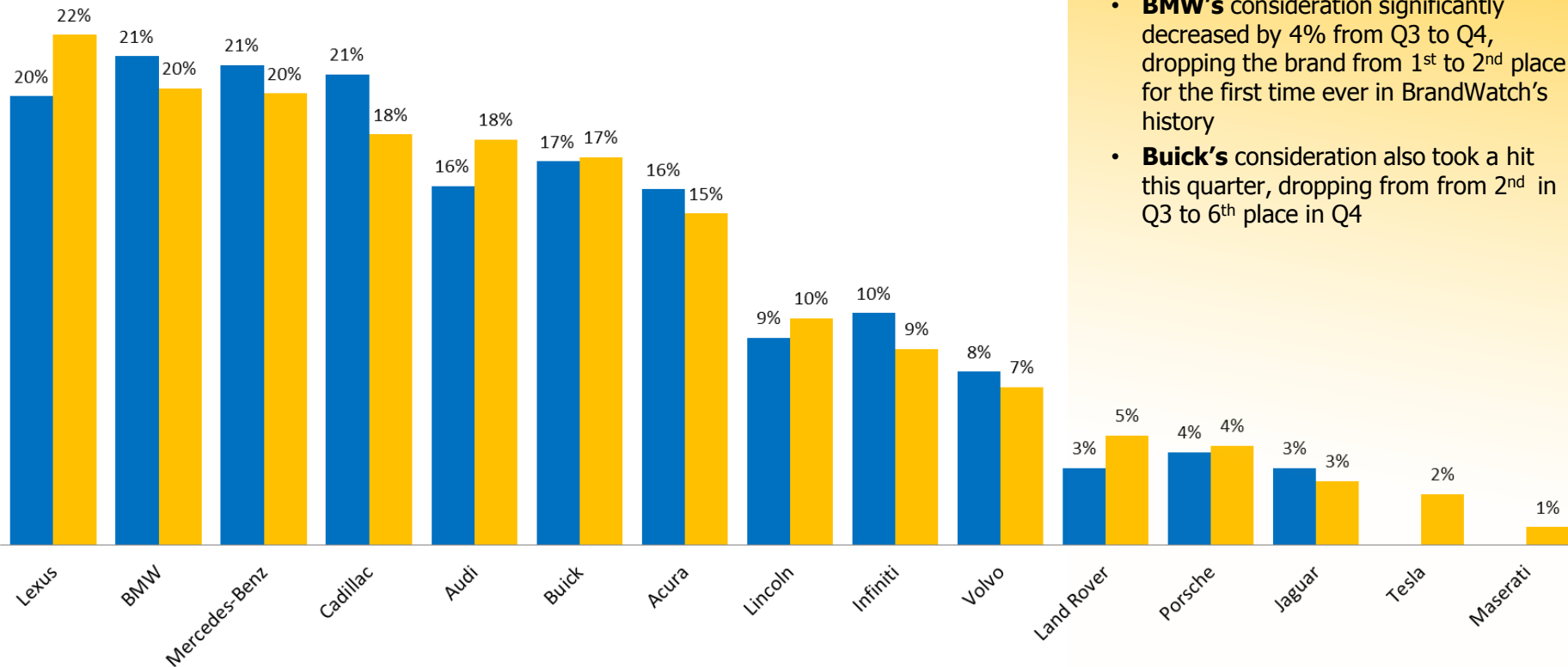


Source: BrandWatch; All Luxury Makes; 2013Q4 n=737, 2014Q4 n=894
 Q: Please select at most 5 vehicles that you are currently shopping.



Luxury Brand Consideration

2013Q4 2014Q4



Highlights:

- **Lexus** was first in consideration for the first time in BrandWatch's history, making a 4% significant increase from Q3 to Q4 of 2014.

Lowlights:

- **BMW's** consideration significantly decreased by 4% from Q3 to Q4, dropping the brand from 1st to 2nd place for the first time ever in BrandWatch's history
- **Buick's** consideration also took a hit this quarter, dropping from from 2nd in Q3 to 6th place in Q4

Source: BrandWatch; All Luxury Makes; 2013Q4 n=737, 2014Q4 n=894
 Q: Please select at most 5 vehicles that you are currently shopping.



Top 10 Considered Luxury Vehicles

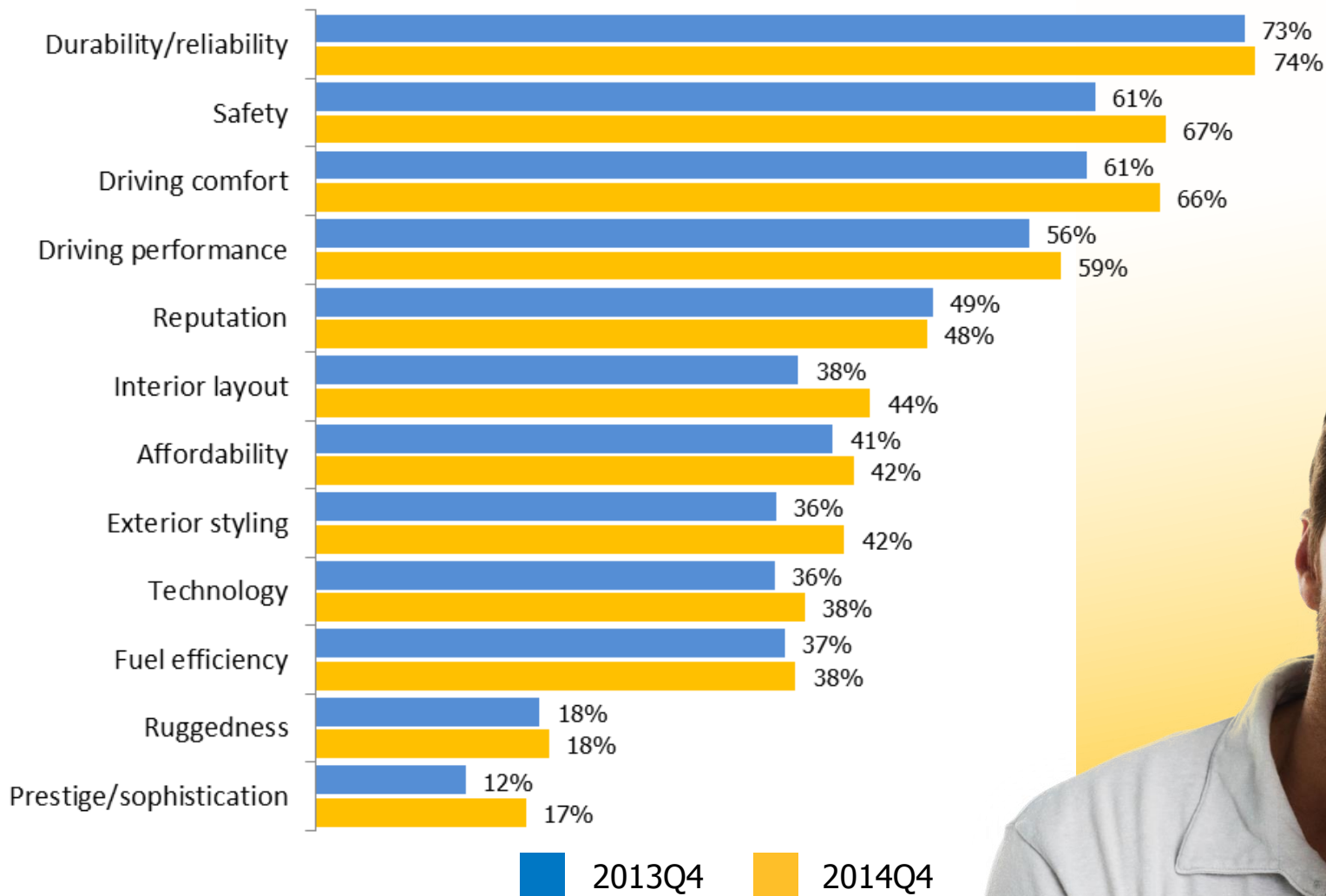
Top 10 Luxury Models		This Year 2014Q4	Last Year 2013Q3
Lexus RX	↑	1	2
BMW 3 Series	↑	2	8
Buick LaCrosse	↑	3	9
Acura MDX	↑	4	5
Buick Enclave	↓	5	3
Cadillac CTS (4dr)	↓	6	1
Lexus ES		7	7
BMW 5 Series	↓	8	6
MBZ C-Class Sedan	↑	9	13
Cadillac SRX	↓	10	4

- **Lexus RX** was 1st in year over year consideration
- **BMW 3 Series** made huge gains, going from 8th to 2nd in consideration
- **Cadillac CTS Sedan** dropped to 6th place in consideration after being 1st last year





Factor Importance Luxury Brands



Source: BrandWatch; All Luxury Makes; 2013Q4 n=737, 2014Q4 n=894

Q: Please review the list below and rate how important are each of the factors to you in deciding on your next new car



Top Ranked Luxury Brand For Each Factor of Importance

Factor	Top Ranked (2014 Q4)	Top Ranked (2013 Q4)
Durability/Reliability	Lexus	Lexus
Safety	Volvo	Volvo
Driving Comfort	Mercedes-Benz	Mercedes-Benz
Driving Performance	Porsche	Porsche
Reputation	Mercedes-Benz	Mercedes-Benz
Interior Layout	Lincoln	Jaguar
Affordability	Buick	Buick
Exterior Styling	Jaguar	Jaguar
*Technology	Mercedes-Benz	N/A
Fuel Efficiency	Acura	Lexus
Ruggedness	Land Rover	Land Rover
Prestige/Sophistication	Porsche	Jaguar

*Technology was new factor that was introduced in 2014

