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# BrandWatch 2015 Q1 Topline Report

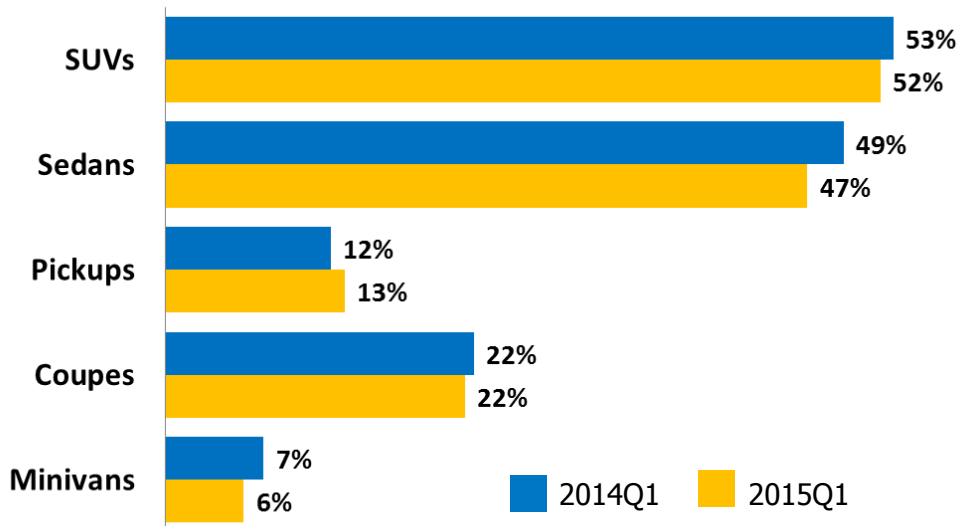


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# Non-Luxury Vehicles



# Non-Luxury Segment Consideration



### Highlights:

- **Honda** vehicles dominated the SUV, Sedan, and Minivan segment. The **CR-V, Accord, and Odyssey** continued to defend their first place standing in year over year consideration
- **Ford F-150 and Mustang** were also top in their respective segments

Segments	Last Year's Top Model (2014 Q1)	This Year's Top Model (2015 Q1)
SUVs	Honda CR-V	Honda CR-V
Sedans	Honda Accord	Honda Accord
Pickups	Ford F-150	Ford F-150
Coupes	Ford Mustang	Ford Mustang
Minivans	Honda Odyssey	Honda Odyssey

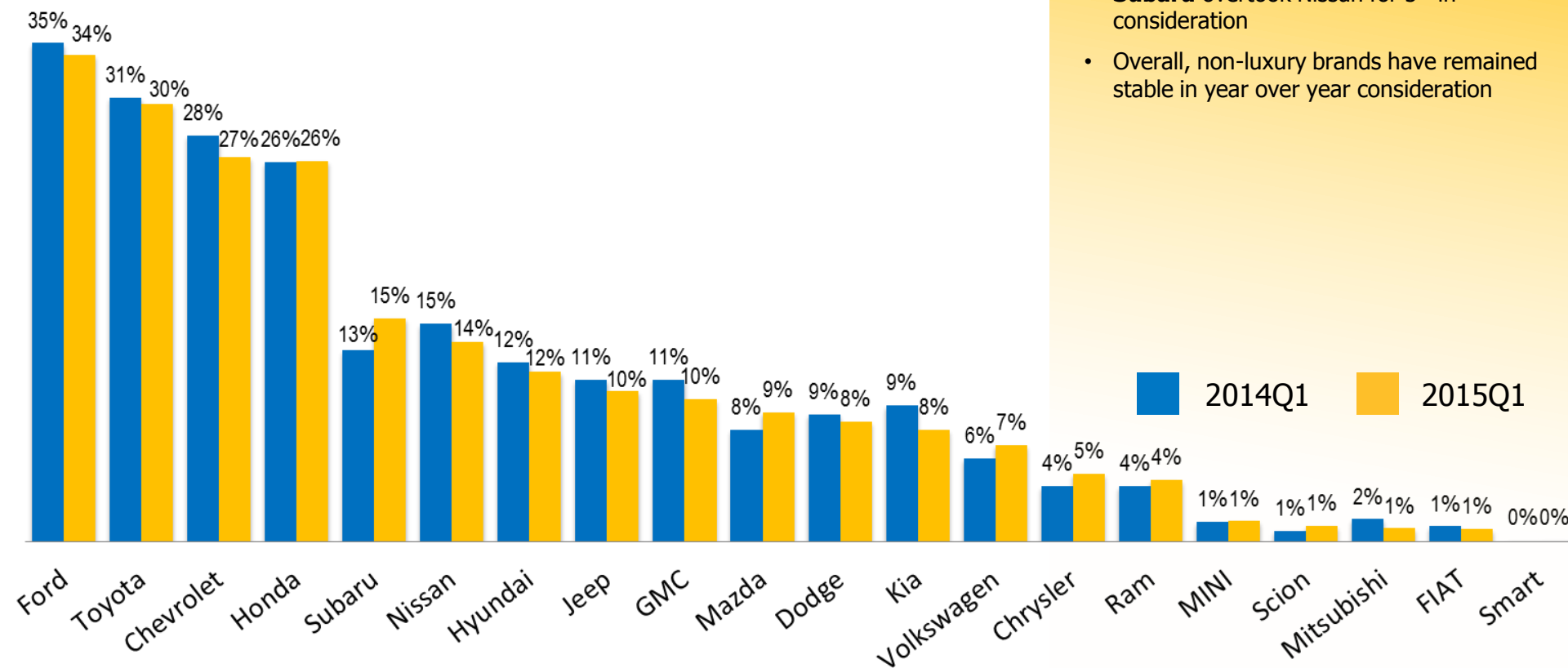
Source: BrandWatch; All Non-Luxury Makes; 2014Q1 n=2414, 2015Q1 n=1796  
 Q: Please select at most 5 vehicles that you are currently shopping.



# Non-Luxury Brand Consideration

## Highlights:

- **Ford** continued to maintain a commanding lead in consideration, distancing itself from Toyota.
- **Subaru** overtook Nissan for 5<sup>th</sup> in consideration
- Overall, non-luxury brands have remained stable in year over year consideration



Source: BrandWatch; All Non-Luxury Makes; 2014Q1 n=2414, 2015Q1 n=1796  
 Q: Please select at most 5 vehicles that you are currently shopping.



# Top 10 Considered Non-Luxury Vehicles

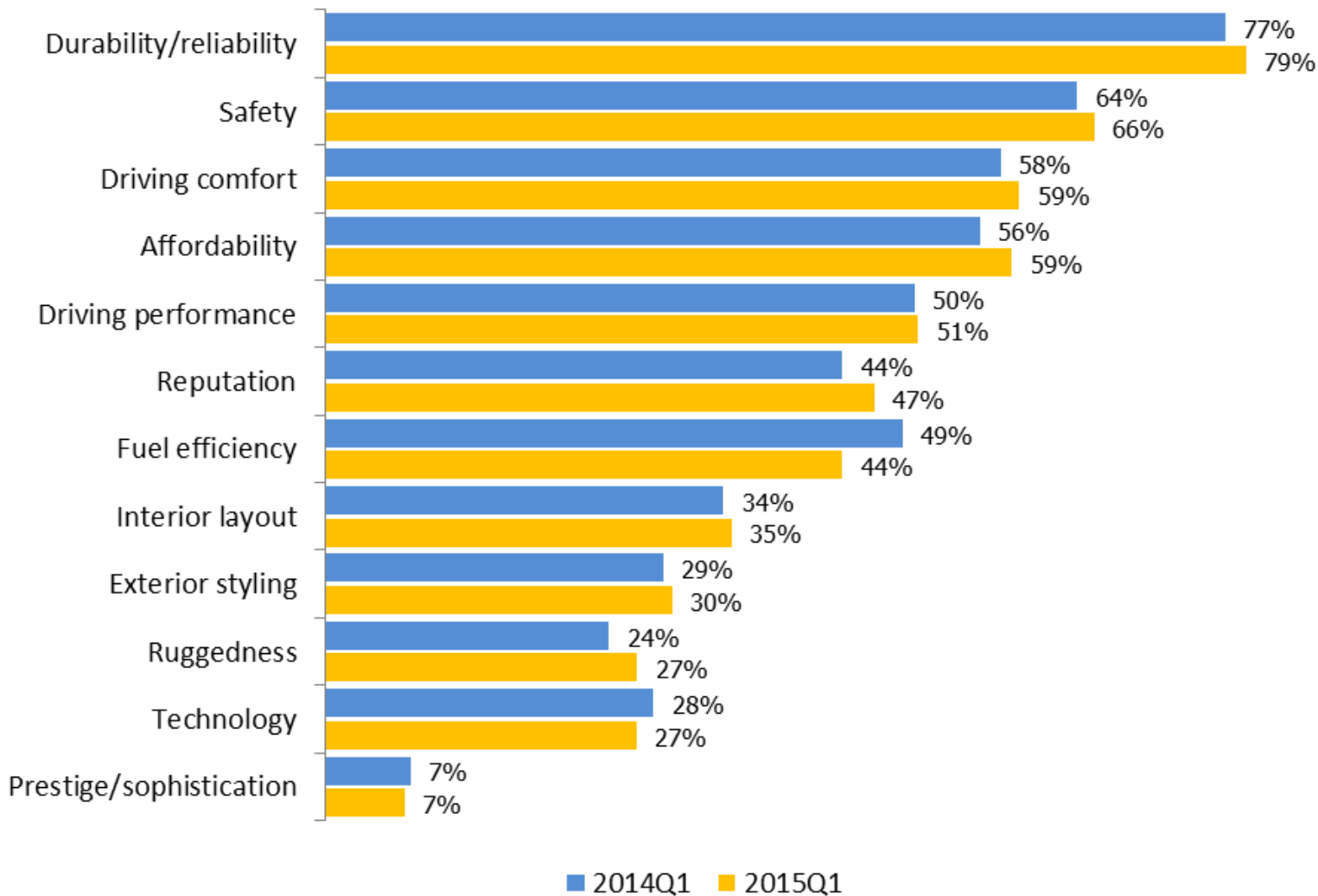
Top 10 Non Luxury Models		This Year 2015Q1	Last Year 2014Q1
Ford F-150		1	1
Honda CR-V		2	2
Honda Accord Sedan	↑	3	4
Chevrolet Silverado 1500	↓	4	3
Toyota Camry	↑	5	7
Ford Escape	↓	6	5
Subaru Forester	↓	7	6
Toyota RAV4	↑	8	11
Subaru Outback	↓	9	8
Ford Fusion	↓	10	9

- **Ford F-150** maintained its number one standing in consideration year over year.
- **Honda Accord, Toyota Camry, and Toyota RAV4** showed an increase in year over year consideration.
- **Jeep Grand Cherokee** fell out of the top 10 this quarter





# Factor Importance Non-Luxury Brands



Source: BrandWatch; All Non-Luxury Makes; 2014Q1 n=2414, 2015Q1 n=1796  
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

Factors	Top Ranked (2015 Q1)	Top Ranked (2014 Q1)
Durability/Reliability	<b>Subaru</b>	<b>Honda</b>
Safety	<b>Subaru</b>	<b>Subaru</b>
Driving Comfort	<b>GMC</b>	<b>GMC</b>
Affordability	<b>Hyundai</b>	<b>Hyundai</b>
Driving Performance	<b>Ram</b>	<b>MINI</b>
Fuel Efficiency	<b>Honda</b>	<b>Honda</b>
Reputation	<b>Subaru</b>	<b>Honda</b>
Interior Layout	<b>Chrysler</b>	<b>GMC</b>
Technology	<b>Subaru</b>	<b>Honda</b>
Exterior Styling	<b>Ram</b>	<b>Chrysler</b>
Ruggedness	<b>Jeep</b>	<b>Jeep</b>
Prestige/Sophistication	<b>GMC</b>	<b>MINI</b>

- **Subaru** was top ranked in 4 out of the 12 factor of importance, appealing to consumers on things that they really care about
- **Ram** was top ranked in Driving Performance and Exterior Styling, indicating that the brand is resonating with consumers
- Several brands maintained their top rank year over year
  - **Subaru - Safety**
  - **GMC – Driving Comfort**
  - **Hyundai – Affordability**
  - **Fuel Efficiency – Honda**
  - **Ruggedness – Jeep**

Source: BrandWatch; All Non-Luxury Makes; 2014Q1 n=2414, 2015Q1 n=1796

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



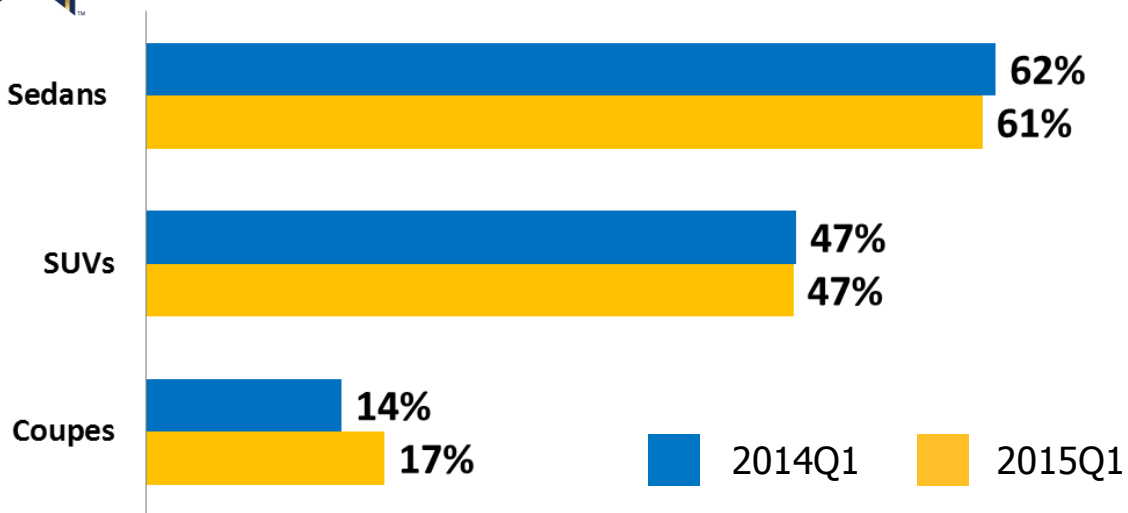
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# Luxury Vehicles





# Luxury Segment Consideration



### Highlights:

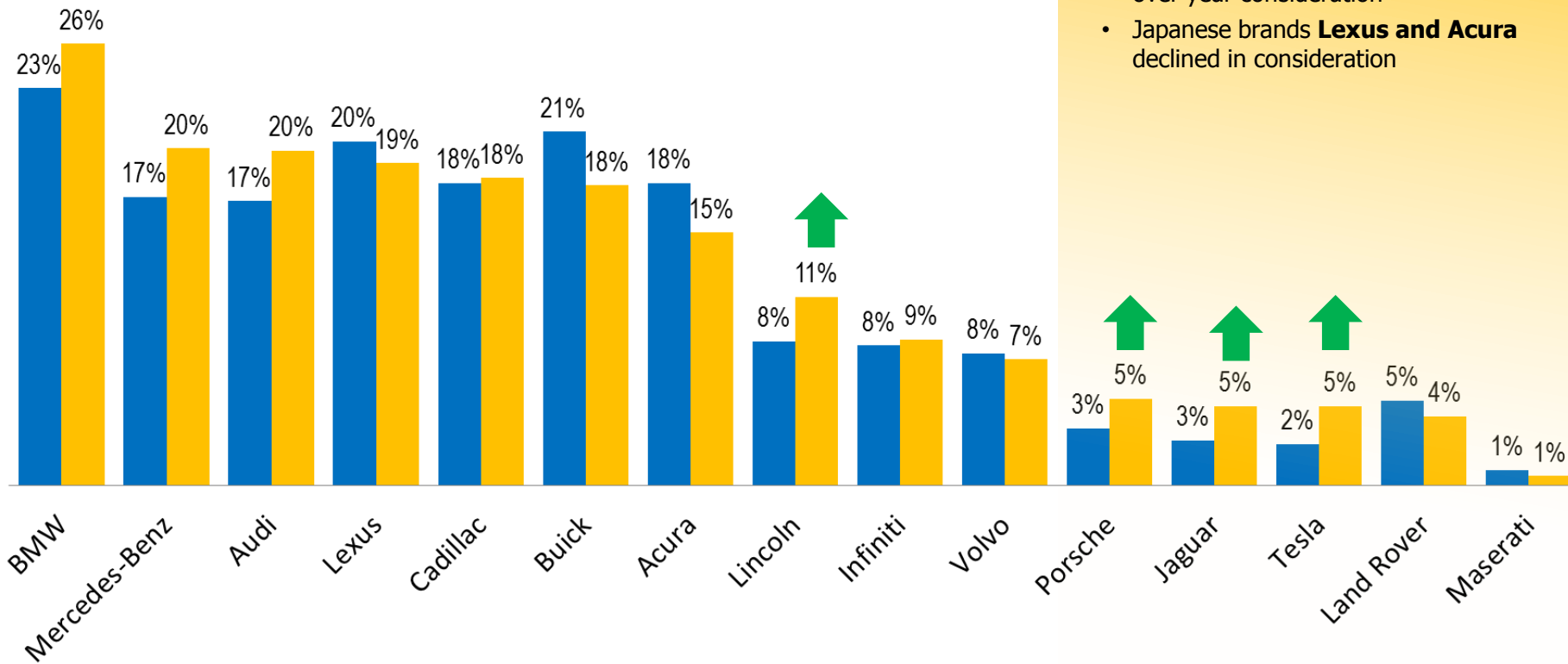
- **BMW** displayed its dominance in the sedan and coupe segment with its **BMW 3 and 4 Series**
- **Buick** took over the SUV segment with the **Enclave**

Segments	Last Year's Top Model (2014 Q1)	This Year's Top Model (2015 Q1)
Sedans	<b>BMW 3 Series</b>	<b>BMW 3 Series</b>
SUVs	<b>Lexus RX</b>	<b>Buick Enclave</b>
Coupes	<b>Cadillac CTS Coupe</b>	<b>BMW 4 Series</b>



# Luxury Brand Consideration

2014Q1 2015Q1



### Highlights:

- Many European luxury brands such as **BMW, Mercedes-Benz, Audi, Porsche, and Jaguar**, had gains in consideration
- American brands **Lincoln and Tesla** have shown significant growth in year over year consideration
- Japanese brands **Lexus and Acura** declined in consideration

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 2015Q1	Last Year 2014Q1
<b>BMW 3 Series</b>		1	1
<b>Buick Enclave</b>	↑	2	3
<b>BMW 5 Series</b>	↑	3	12
<b>Lexus RX</b>	↓	4	2
<b>Buick LaCrosse</b>	↓	5	4
<b>Tesla Model S</b>	↑	6	24
<b>Cadillac CTS Sedan</b>	↓	7	6
<b>Cadillac SRX</b>	↑	8	16
<b>Acura RDX</b>	↓	9	7
<b>Audi A6</b>	↑	10	15

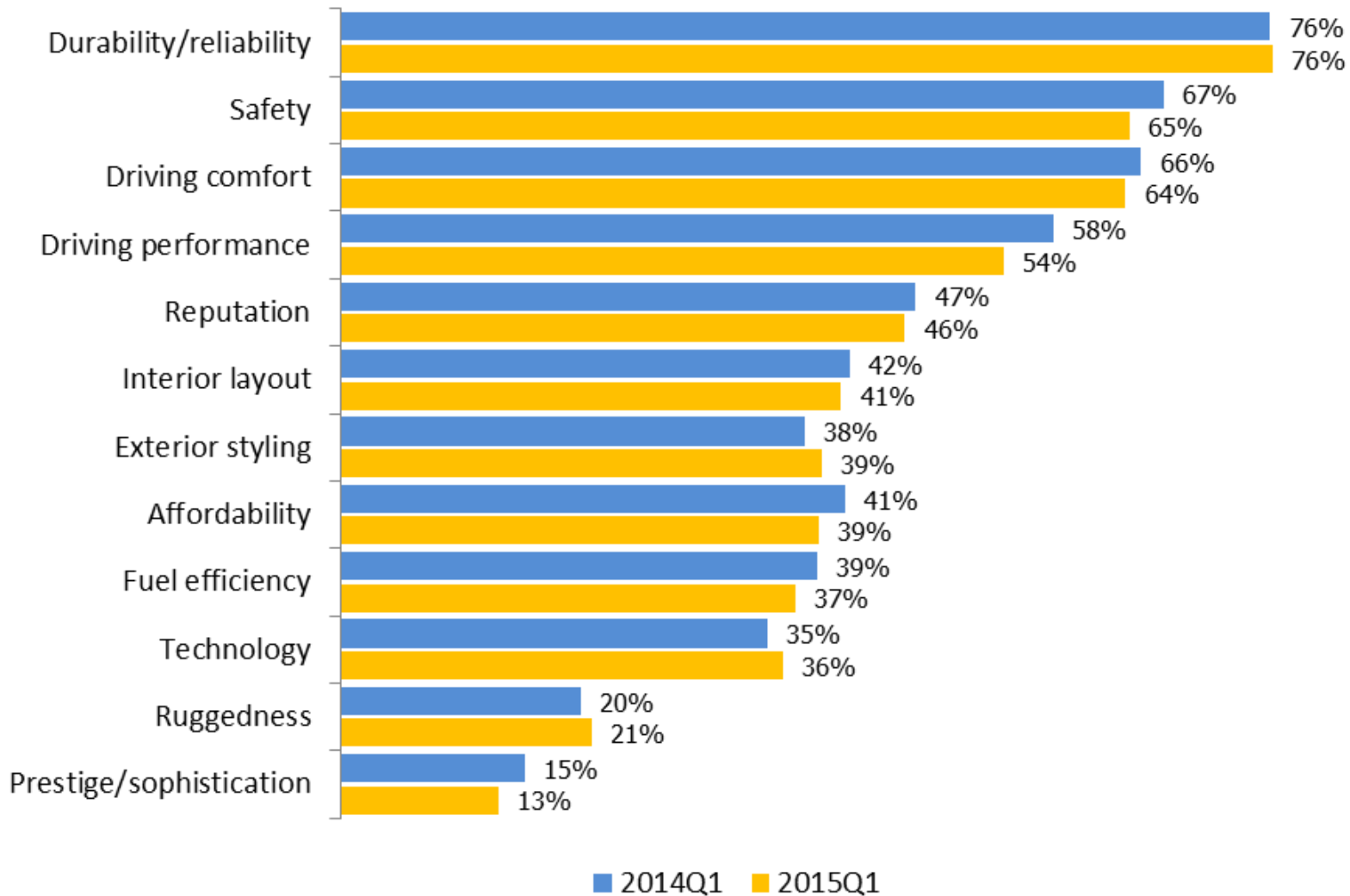
- **BMW 3 Series** was 1<sup>st</sup> in year over year consideration
- **Tesla Model S, BMW 5 Series, Cadillac SRX, and Audi A6** made their first appearance in the top 10 list this quarter
- **Acura MDX, Lexus ES, Audi A4, and BMW X3** dropped out of the top 10 list



Source: BrandWatch; All Luxury Makes; 2013Q4 n=737, 2014Q4 n=894  
 Q: Please select at most 5 vehicles that you are currently shopping.  
 Note: Arrows signify an increase or decrease in rank from 2014Q1 to 2015Q1



# Factor Importance Luxury Brands



Source: BrandWatch; All Luxury Makes; 2014Q1 n=867, 2015Q1 n=691

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

Factors	Top Ranked (2015 Q1)	Top Ranked (2014 Q1)
Durability/Reliability	<b>Lexus</b>	<b>Lexus</b>
Safety	<b>Volvo</b>	<b>Volvo</b>
Driving Comfort	<b>Lexus</b>	<b>Cadillac</b>
Driving Performance	<b>Porsche</b>	<b>Porsche</b>
Reputation	<b>Lexus</b>	<b>Lexus</b>
Interior Layout	<b>Lexus</b>	<b>Cadillac</b>
Affordability	<b>Buick</b>	<b>Buick</b>
Exterior Styling	<b>Jaguar</b>	<b>Porsche</b>
Technology	<b>Mercedes-Benz</b>	<b>Mercedes-Benz</b>
Fuel Efficiency	<b>Lexus</b>	<b>Lexus</b>
Ruggedness	<b>Land Rover</b>	<b>Land Rover</b>
Prestige/Sophistication	<b>Jaguar</b>	<b>Porsche</b>

- **Lexus** was top ranked in 5 out of the 12 factor of importance
- A majority of brands maintained their top rank year over year
  - **Lexus – Durability/Reliability, Reputation, Fuel Efficiency**
  - **Volvo – Safety**
  - **Porsche – Driving Performance**
  - **Technology – Mercedes-Benz**
  - **Affordability - Buick**
  - **Ruggedness – Land Rover**

Source: BrandWatch; All Luxury Makes; 2014Q1 n=867, 2015Q1 n=691

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