



Final Report

Auto Brand Perceptions 2014: National Consumer Assessment

Appendix: December 2012 Results, Questionnaire

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Consumer Reports National Research Center

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Methodology

- Telephone surveys were conducted among 2,018 random adults (1,317 landline telephone and 701 cell phone) comprising 1,012 men and 1,006 women 18 years of age and older. Respondents were screened for ownership by the household of one or more vehicles. The analysis is based on the 1,578 adults who said that their household owns a vehicle. Interviewing took place over December 6-15, 2013.
- The questionnaire was fielded via Opinion Research Corporation's Caravan twice-weekly national telephone omnibus survey. ORC used random digit dialing to achieve a nationally representative probability sample and weighted completed interviews by age, sex, geographic region and race.
- Previous brand perception surveys were conducted in December 2007-2012.
 - ✓ Four new brands were included in the study this year: Bentley, Lamborghini, Maserati, Rolls-Royce.
- Statistical comment: In the tables, within the banner segments for age and household income, a cell enclosed in a rectangular border is significantly different from the lowest-scoring counterpart in that segment at a 90% confidence level minimum. Note that the Total column has no counterpart.
- The results of this study are intended for external communications. Methodology statement for public release:

The Consumer Reports National Research Center conducted a telephone survey using two nationally representative probability samples: landline telephone households and cell phones. 1,764 interviews were completed among adults aged 18+ whose household owns at least one vehicle. Interviewing took place over December 6-15, 2013. The sampling error is +/- 2.4% at a 95% confidence level.



Methodology (cont.)

Banner Legend and Definitions

- **Total Unaided Awareness (of U.S. car makes)**
Comprises makes indicated in one or more of nine questions, all unaided, including:
 - ✓ Identified in the awareness question (unaided).
 - ✓ Chosen as the exemplar in at least one of the seven factor questions (unaided):
 - ⇒ Design/style
 - ⇒ Performance
 - ⇒ Quality
 - ⇒ Safety
 - ⇒ Technology/innovation
 - ⇒ Value
 - ⇒ Fuel economy
 - ✓ Mentioned as the car driven most frequently (unaided).

- **Weighted Total Score (or *WtdTot Score*)**
 - ✓ For each make, Total Score is an index calculated as the total number of times that the particular make was mentioned as an exemplar across all seven factors, weighted by factor importance, and divided by Total Unaided Awareness of the make and multiplied by 100.
 - ✓ Interpretation: This variable measures the overall performance of a brand across the seven factors relative to Total Unaided Awareness.



Methodology (cont.)

- **Factor Score (or FScore)**
 - ✓ For each of the seven attributes by make, Factor Score is the number of times that the particular make was mentioned as an exemplar for that attribute, expressed as a percentage of Total Unaided Awareness of the particular make.
 - ✓ Interpretation: This variable gauges a brand's performance on the particular factor relative to its Total Unaided Awareness.

- **Factor Contribution (or FContrib)**
 - ✓ For each of the seven factors by make, Factor Contribution is the number of times that the particular make was mentioned as an exemplar for that factor, expressed as a percentage of the total number of times that the make was mentioned as an exemplar across all seven factors.
 - ✓ Interpretation: This variable measures which factor(s) drive the brand. For a given factor, the variable indicates the weight of the brand's performance on that particular factor relative to the brand's total performance across all seven factors. If, for example, a brand scored 25% for value, then value accounted for one-quarter of its performance overall.

- **Factors— Perform:** Named *performance* among the top three factors considered when shopping for a new car.
Quality: Named *quality*...
Safety: Named *safety*...
Value: Named *value*...



Implications

- The automotive industry in 2013 continued its recovery, although at a slower pace. For the full calendar year, light vehicle sales totaled 15.6 million units, up 8% from January-December 2012, compared to the 13% growth rate for 2012 over 2011. Consistent with recent years, sales performance varied considerably among leading automakers. Considering companies with 2012 sales of at least 250,000 units, Subaru (+26%), Daimler (+13%) and Ford (+11%) posted the biggest gains, while sales at Kia and Volkswagen shrank by 4% and 2%, respectively.
- Alongside the sales results, this latest edition of the Consumer Reports auto brand perception poll indicates that the competition for mindshare among the strongest brands remains heated. For 2013, the leader's board of overall brand perceptions was topped by the same four brands as the year before, but two brands entered the top ten (Tesla and Subaru) and two exited (Dodge and Hyundai).
- In addition, while nine of the top ten brands improved their Weighted Total Score versus the year before (Honda was the exception), the improvement varied from 3 to 41 index points. Notably, the spread between number one and 10 fell to 33 points, nearly one-third the 92-point spread registered in 2012.
- Beginning with number one, the Weighted Total Score and change from 2012 were: Toyota (145.4, +11 index points), Ford (120.4, +3 points), Honda (108.6, -16 points), Chevrolet (105.2, +13 points), Tesla (88.0, +41 points), Subaru (86.6, +40 points), Mercedes-Benz (82.5, +8 points), Volvo (80.4, +8 points), Cadillac (77.8, +15 points) and BMW (73.4, +12 points) at number ten. (pages 17-18)



Implications (cont.)

- In the 2013 brand perception survey, respondents first rated the importance of seven dimensions relevant to the choice of a new vehicle, then reported their awareness of car makes sold in the U.S., and subsequently assessed brand leadership in each of these areas.
- Importance of the seven dimensions fell into three tiers, with *quality* and *safety* on top, and only one dimension changed by a meaningful amount from December 2012 (*design/style*, +6 points). Figures below are based on a 100-point scale. (page 13)
 - ✓ Quality (90 points)
 - ✓ Safety (88 points)
 - ✓ Performance (83 points)
 - ✓ Value (82 points)
 - ✓ Fuel economy (81 points)
 - ✓ Design or style (70 points)
 - ✓ Technology or innovation (68 points)
- Consumers went on to name the number one brand according to each of the seven factors, and the data were used to identify the top ten leaders in the individual areas, and in terms of overall score weighted for importance of the factors.



Implications (cont.)

- Overall leadership in the seven factors (pages 19-26)
 - ✓ The ranks of the top ten brands overall registered some change from last year. Toyota, Ford, Honda and Chevrolet remained at numbers one to four, with Ford and Honda swapping places. Tesla and Subaru entered the top ten, pushing Mercedes-Benz, Volvo, Cadillac and BMW down by two slots and displacing Dodge and Hyundai.
 - ✓ Although scores rose among nine of the top ten brands (Honda fell 16 points), the improvement ranged from at least 40 points for Tesla and Subaru to under 5 points for Toyota and Ford.
 - ✓ Another way of summarizing perceptions of the top four brands is to examine the number of times that they finished among the top four across the seven individual attributes. Toyota and Ford distinguished themselves with strength balanced across five of the factors, compared to two factors for Chevrolet and Honda.

- Quality (page 20)
 - ✓ Honda slipped to number five this year from number one, as Toyota, Mercedes-Benz, Ford and Chevrolet each rose one position and Toyota became the perceived leader in *quality*.
 - ✓ Cadillac and Lexus also climbed one rung, while Subaru entered at number eight and BMW fell to the bottom from sixth.



Implications (cont.)

- **Safety (page 21)**
 - ✓ Volvo continued to have a substantial lead in the area of *safety*, with 60% of consumers who are aware of the brand naming it number one.
 - ✓ Also among the top ten, Subaru climbed by four slots to number two, while GMC trucks and Buick displaced Tesla and Dodge toward the bottom of the list.

- **Performance (page 22)**
 - ✓ Chevrolet bounced to the top of the list for *performance*, from number three in 2012, as previous leader Ferrari tumbled to seventh.
 - ✓ Lamborghini entered at number five, and Subaru climbed to number ten, as Honda and Cadillac (formerly fifth and tenth) fell off.
 - ✓ Audi rose by five slots to number four, while Toyota, Porsche and Dodge remained in the lower half of the list.

- **Value (page 23)**
 - ✓ Toyota, Honda and Ford remained at numbers one, two and three this year, while Kia climbed two slots to fourth, Chevrolet was steady and Hyundai dropped to eighth, down by four positions from 2012.
 - ✓ Subaru, Tesla, Volkswagen and Lamborghini entered the lower half of the top ten, booting Mercedes-Benz, Dodge and Cadillac.



Implications (cont.)

- **Fuel economy (page 24)**
 - ✓ The top ten brands for *fuel economy* were unchanged in 2013, but the rank order changed. Toyota remained in the number one position on this attribute, as Smart eclipsed Honda to become the runner-up.
 - ✓ Tesla, previously eighth, jumped into fourth place, ahead of Volkswagen, Ford and Hyundai.
 - ✓ Chevrolet slipped to eighth, while Kia and Nissan held their positions at the bottom.

- **Design or style (page 25)**
 - ✓ BMW took first place from Audi, which slipped to third, while Cadillac held steady at number two.
 - ✓ Mercedes-Benz and Chevrolet edged up as Ford and Lexus slipped modestly.
 - ✓ Ferrari and Tesla entered at numbers eight and nine, kicking Jaguar and Toyota out of the top ten, while Dodge finished at the bottom, registering a two-slot decline.

- **Technology or innovation (page 26)**
 - ✓ Tesla jumped over five rivals to capture the lead of the *technology/innovation* attribute from Toyota, as Mercedes-Benz remained in second place and Toyota slipped to number three.
 - ✓ BMW gained modestly, while Cadillac, Lexus and Chevrolet registered a modest decline.
 - ✓ Audi climbed a couple of rungs to seventh, while Acura entered the top ten at number ten and its brand-mate dropped off.



Implications (cont.)

- The next time consumers are in the market for a new car, they are most likely to buy Ford (17.1%). Toyota would be chosen by 13.6%, Chevrolet by 13.3% and Honda by 8.7%. (pages 30-32)
- Calculated brand loyalty, however, remained highest for Toyota among the five bellwether brands tracked in the study. This year, a solid majority of current Toyota drivers said they are likely to purchase their brand again. Compared to the December 2011 study, brand loyalty slipped 6 points for Toyota (to 60%), which retained its clear lead. In the second tier, Ford and Honda drivers finished neck-and-neck—56% are thinking about a new Ford (down by 4 percentage points), and 54% will consider a Honda (-3 pp). Chevy registered a 13-point decline to 41%, and Dodge stayed in last place as its calculated loyalty plummeted by 19 points to 25%. (page 33)
- The four leading makes also are on top of the list of other brands that consumers are considering for their next new car. In rank order, they are Chevrolet (16.4%), Ford (15.5%), Toyota (14.1%) and Honda (12.3%). Additionally, they scored highest for total consideration, which is the sum of the scores for the two measures: the brand most likely to be purchased plus other brands likely to be considered. Ford eclipsed Chevrolet in terms of total consideration, which was followed closely by Toyota. Total consideration for Honda (21.0%) was nearly 7 points behind Toyota and 13 points below Ford. (pages 34-39)
- The competitive field is now relatively flat among the top four brands (Ford, Chevrolet, Toyota and Honda), although overall appeal of Honda has receded some from a year ago. Essentially, the differences perceived by car buyers are narrow, because in the consumer's mind, there are now a variety of very good choices for a new vehicle.



Implications (cont.)

- A question about car features rounded out the survey. Respondents were asked how likely they are to require that their next new car have a variety of features. Familiarity with most features was high, but more than 10% were not familiar with two features (electronic stability control, lane-departure warning). (pages 40-43)
 - ✓ Half or more said they *definitely* or *probably would require* the following:
 - ⇒ Side-curtain air bags (79%)
 - ⇒ Blind-spot detection (65%)
 - ⇒ Navigation (63%)
 - ⇒ Forward-collision warning (58%)
 - ⇒ A back-up camera (58%)
 - ⇒ Electronic stability control (56%)
 - ⇒ HID or LED headlamps (52%)
 - ⇒ Bluetooth phone connectivity (51%)
 - ✓ The two least-popular features fared the worst among older car owners (*probably* or *definitely would not require*):
 - ⇒ Text-to-voice for texting, Facebook or Twitter (79% aged 45+ years vs. 70% aged 18-44 years)
 - ⇒ Mobile WiFi, meaning the car provides Internet service (71% vs. 58%)



Household Car Ownership

- Around three-quarters (77%) adults contacted said their household owns at least one car, and were qualified to proceed with the interview. Ownership fell from last year (85%), likely due to the declining propensity of younger drivers to own a car.
- Vehicle ownership scaled with household income.

AA1 - Does your household own one or more cars?

Base: All Respondents

	TOTAL	Gender		Age		HHld Income	
		Men	Women	18-44	45+	<\$50K	\$50K+
UNWEIGHTED BASE	2,018	1,012	1,006	603	1,359	877	707
	%	%	%	%	%	%	%
Yes	77	80	74	77	77	69	89
No	23	20	26	23	23	31	11



Importance of Factors in New-Car Purchase

- The most-important factors that consumers said they keep in mind when shopping for a new car are *quality* (90 points based on 100-point scale) and *safety* (88 points).
- *Performance* (83 points) was the number three factor in terms of importance, and it tied with *value* (82 points). Remaining attributes scored lower: *Fuel economy*, *design/style*, and *technology/innovation*.
- Women deemed *safety* and *fuel economy* more important than men.

AA3ALL - There are several things that you may consider when shopping for a new car. I would like you to rate how important each factor is to you when shopping for a new car on a scale of 1 to 100, where 100 equals extremely important and 1 equals extremely unimportant.

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	Avg	Avg	Avg	Avg	Avg	Avg	Avg	Avg	Avg	Avg	Avg
Quality	90	89	91	90	90	89	91	90	91	91	89
Safety	88	84	92	87	89	89	86	88	86	89	88
Performance	83	81	86	81	85	84	82	83	82	84	82
Value	82	80	84	80	84	81	83	83	82	83	80
Fuel economy	81	77	85	80	82	84	78	83	81	81	80
Design or style	70	71	70	70	71	68	73	68	69	72	70
Technology or innovation	68	68	68	68	68	67	69	65	65	71	68



Total Unaided Awareness of Car Brands

- **Four automobile makes captured a majority of mind-share as measured by total unaided awareness. The rank order was unchanged versus 2012, but scores edged down slightly.**
 - ✓ **Ford (78% in 2013 vs. 85% in 2012)**
 - ✓ **Chevrolet (68% vs. 72%)**
 - ✓ **Toyota (60% vs. 68%)**
 - ✓ **Honda (46% vs. 50%)**
- **Two GM makes comprised tier 2. Under 4 in 10 consumers reported awareness of Dodge (38% in 2013 vs. 42% in 2012) and Chrysler (31% 40%).**
- **The third tier was populated by three Asian makes, two European and three GM makes, and all registered declines of at least 3 percentage points versus 2012. Awareness of BMW, Hyundai and Mercedes-Benz dropped the most (-6 percentage points).**
 - ✓ **Nissan (28% in 2013 vs. 33% in 2012)**
 - ✓ **BMW (27% vs. 33%)**
 - ✓ **Mercedes-Benz (26% vs. 32%)**
 - ✓ **GMC trucks (25% vs. 30%)**
 - ✓ **Cadillac (24% vs. 29%)**
 - ✓ **Hyundai (22% vs. 28%)**
 - ✓ **Buick (21% vs. 26%)**
 - ✓ **Kia (20% vs. 23%)**

INTRODUCTION:

Thinking of all the car makes sold in the U.S., which ones are you aware of? What other makes can you think of?

AA4-AA6ALL - Total Unaided Awareness

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	%	%	%	%	%	%	%	%	%	%	%
Ford	78	81	75	78	78	78	79	78	85	76	75
Chevrolet	68	71	64	67	68	70	68	60	74	68	66
Toyota	60	63	56	62	57	51	68	65	55	57	64
Honda	46	50	42	53	39	43	49	44	44	43	54
Dodge	38	45	32	44	34	39	41	39	40	36	40
Chrysler	31	36	26	31	32	30	36	32	39	26	32
Nissan	28	32	24	30	26	24	35	29	20	30	31
BMW	27	31	23	32	22	23	33	31	19	28	29
Mercedes-Benz	26	30	23	27	25	18	36	36	20	27	25
GMC trucks	25	30	21	28	23	22	31	24	31	23	24
Cadillac	24	27	21	22	26	22	27	26	23	24	25
Hyundai	22	27	17	24	20	16	28	33	21	18	22
Buick	21	22	19	18	23	21	19	21	27	20	15
Kia	20	20	19	22	17	17	24	18	21	17	25
Volkswagen	18	19	17	18	18	15	21	22	19	16	16
Volvo	18	19	16	18	18	14	23	26	16	17	16
Lexus	17	18	17	18	17	12	24	23	14	17	18
Audi	16	20	11	19	12	11	22	23	13	12	19
Subaru	15	18	12	17	13	11	19	24	10	12	18
Jeep	15	16	14	19	11	13	18	18	16	15	12
Acura	13	17	8	17	9	10	16	18	10	10	15

AA4-AA6ALL - Total Unaided Awareness (cont.)

Base: Household Owns Car

	Gender		Age		HHld Income		Region				
	TOTAL	Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	%	%	%	%	%	%	%	%	%	%	%
Mazda	12	14	11	15	10	12	13	17	12	12	10
Lincoln	12	15	9	12	12	10	14	14	12	11	12
Porsche	10	13	7	11	9	7	12	13	8	9	10
Mitsubishi	9	11	7	12	7	8	10	14	9	8	7
Ferrari	9	12	5	12	6	7	11	13	8	7	9
Infiniti	9	11	6	11	7	6	12	13	9	7	8
Lamborghini	8	12	4	10	5	6	10	12	7	7	6
Tesla	8	11	4	10	5	7	8	9	7	7	8
Fiat	7	9	6	7	7	6	8	10	10	5	7
Bentley	7	10	4	9	5	6	9	11	6	5	9
Jaguar	7	8	5	8	6	5	8	11	6	5	7
Land Rover	6	8	5	9	4	4	8	10	6	6	5
Ram trucks	6	8	5	8	4	7	6	9	7	7	4
Rolls-Royce	6	9	3	7	5	6	7	11	7	4	5
Scion	5	7	4	7	3	5	6	6	5	6	4
Maserati	5	7	3	7	4	5	5	9	4	5	4
Mini	5	7	2	6	3	3	6	8	5	4	4
Smart	5	6	3	6	3	4	5	7	4	5	3
Other	13	16	11	15	12	16	11	9	12	14	16
Don't know	25	18	33	22	27	27	20	25	28	22	28



Brand Perception Report

- The brand perception report summarizes the performance of vehicle makes sold in the U.S. in terms of unaided awareness and leadership in the seven factors.
- Guide to interpreting the results, e.g., for Toyota:
 - ✓ **Weighted Total Score = 145.4 index**
Across all seven factors, Toyota was considered a leader more often than any other brand, and more than twice as often as Buick (59.3 index).
 - ✓ **Total Unaided Awareness = 59.8%**
More than half of consumers interviewed reported being aware of Toyota.
 - ✓ **Design/Style: FScore = 12.4%, FContrib = 8.0%**
Among consumers aware of Toyota, 12.4% said that Toyota leads all other brands with *design/style*, and this factor accounted for 8.0% of exemplary mentions across all seven factors for Toyota.
 - ✓ **Fuel Economy: FContrib = 25.9%**
Fuel economy contributed more than one-quarter of Toyota's leadership scores totaled across all seven factors. As a driver of the Toyota brand perception, *fuel economy* had more than three times the influence as *design or style* (8.0%).

Brand Perception Report

Base: Household Owns Car

Brand	WtdTot			Total Unaided		Design/Style		Performance		Quality		Safety		Tech./Innov.		Value		Fuel Economy	
	Score	Index	Count	Count	%	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib
Toyota	145.4	920	59.8	12.4	8.0	15.9	10.3	22.6	14.6	19.1	12.3	19.5	12.6	25.3	16.3	40.2	25.9		
Ford	120.4	1,202	78.1	17.1	13.1	18.4	14.1	19.4	14.9	17.4	13.4	19.5	15.0	20.3	15.6	18.1	13.9		
Honda	108.6	710	46.2	8.0	7.1	11.6	10.3	18.6	16.6	16.4	14.6	10.8	9.6	21.4	19.0	25.7	22.9		
Chevrolet	105.2	1,039	67.6	17.6	15.4	22.1	19.4	19.1	16.7	15.4	13.5	11.3	9.9	16.0	14.0	12.6	11.0		
Tesla	88.0	116	7.5	15.0	13.2	10.0	8.7	11.7	10.3	9.1	8.0	33.9	29.8	11.7	10.3	22.5	19.7		
Subaru	86.6	233	15.1	7.8	8.5	12.6	13.7	12.9	14.1	29.8	32.4	5.6	6.0	15.7	17.1	7.5	8.1		
Mercedes-Benz	82.5	404	26.3	19.6	20.3	10.6	11.0	20.7	21.5	13.8	14.3	19.7	20.5	10.0	10.4	1.9	1.9		
Volvo	80.4	275	17.9	4.7	5.1	5.2	5.7	10.3	11.2	60.0	65.5	4.8	5.3	3.7	4.1	3.0	3.2		
Cadillac	77.8	372	24.2	20.4	22.3	12.3	13.4	18.6	20.3	9.9	10.8	18.1	19.7	9.0	9.8	3.4	3.7		
BMW	73.4	411	26.7	20.4	22.6	20.6	22.8	12.1	13.3	8.3	9.2	18.2	20.2	7.6	8.4	3.2	3.5		
Buick	59.3	316	20.5	10.9	16.4	8.3	12.4	12.1	18.3	10.9	16.3	10.0	15.1	9.0	13.6	5.3	7.9		
GMC trucks	56.4	389	25.3	7.6	12.8	9.7	16.4	8.7	14.6	12.2	20.6	6.1	10.3	8.8	14.9	6.1	10.3		
Audi	54.0	241	15.7	20.2	27.6	16.5	22.6	9.0	12.3	5.7	7.8	16.5	22.6	2.4	3.3	2.8	3.8		
Nissan	53.6	430	27.9	7.3	12.7	6.7	11.8	7.1	12.4	7.0	12.2	9.1	15.9	9.3	16.3	10.7	18.7		
Smart	52.9	71	4.6	4.5	7.3	2.5	4.0	5.7	9.2	0.0	0.0	8.2	13.2	8.3	13.4	32.9	52.9		
Dodge	52.9	589	38.3	13.3	22.6	14.1	23.9	6.1	10.4	6.3	10.7	6.1	10.4	6.9	11.7	6.0	10.2		
Lexus	51.9	269	17.5	17.0	23.9	7.5	10.6	13.3	18.7	7.2	10.1	16.5	23.2	6.8	9.6	2.7	3.8		
Volkswagen	49.8	277	18.0	4.9	7.8	5.6	9.0	8.4	13.5	6.0	9.6	6.9	11.0	10.3	16.5	20.4	32.6		
Hyundai	40.9	338	22.0	5.5	12.3	4.1	9.2	3.5	7.9	4.6	10.3	3.3	7.4	10.8	24.2	12.8	28.7		
Kia	39.7	303	19.7	7.1	13.9	2.9	5.6	2.2	4.3	4.0	7.9	5.0	9.9	18.4	36.1	11.4	22.3		
Lamborghini	37.4	121	7.8	9.9	18.9	16.0	30.5	3.5	6.7	2.6	4.9	8.1	15.5	10.2	19.6	2.0	3.8		
Chrysler	33.9	482	31.3	8.7	21.4	8.1	20.0	4.5	11.1	4.6	11.3	5.4	13.4	6.0	14.9	3.2	7.9		
Bentley	33.0	113	7.3	10.8	24.2	7.0	15.7	10.0	22.3	3.8	8.4	6.2	13.9	6.9	15.4	0.0	0.0		
Lincoln	31.4	182	11.9	9.2	22.1	5.4	12.8	7.1	17.0	5.6	13.4	8.6	20.6	4.5	10.7	1.5	3.5		
Ferrari	31.3	134	8.7	16.0	34.4	15.6	33.6	3.3	7.2	2.8	6.1	7.0	15.2	1.7	3.6	0.0	0.0		
Mazda	28.3	189	12.3	4.8	13.6	6.3	17.9	1.8	5.2	2.2	6.3	4.3	12.1	7.1	20.3	8.6	24.6		
Acura	28.1	197	12.8	9.9	16.9	8.2	14.0	6.0	10.3	8.4	14.4	11.3	19.3	7.5	12.8	7.2	12.3		
Porsche	24.8	150	9.8	9.4	28.0	14.8	44.2	3.0	9.1	1.2	3.7	3.9	11.5	1.2	3.5	0.0	0.0		
Fiat	24.4	115	7.4	1.8	6.1	4.4	15.1	5.1	17.6	3.7	12.8	5.3	18.0	4.1	14.0	4.9	16.6		
Jeep	23.4	229	14.9	4.7	18.0	1.6	6.1	5.8	22.2	2.2	8.3	3.8	14.6	6.0	22.9	2.1	7.9		
Infiniti	22.0	134	8.7	3.6	12.7	6.7	23.4	3.3	11.3	2.2	7.7	8.4	29.2	3.4	11.8	1.1	3.9		
Mitsubishi	20.8	141	9.1	6.0	22.9	6.2	23.7	4.2	16.1	1.3	5.0	2.4	9.1	2.4	9.3	3.6	13.9		
Mini	20.6	72	4.7	3.8	16.8	1.1	5.0	1.1	5.0	4.1	18.0	3.8	16.6	1.4	6.1	7.4	32.6		
Ram trucks	17.2	98	6.4	0.3	1.4	4.6	21.5	2.3	10.6	4.0	18.6	4.7	22.1	3.5	16.5	2.0	9.4		
Scion	16.8	81	5.3	1.0	5.0	2.6	13.9	1.5	7.7	2.6	13.9	5.7	29.8	1.0	5.0	4.7	24.8		
Rolls-Royce	11.2	96	6.2	5.2	26.3	0.8	4.3	7.2	36.5	2.3	11.5	0.8	4.3	3.4	17.2	0.0	0.0		
Jaguar	9.2	102	6.6	6.8	45.8	2.6	17.8	2.8	19.1	0.4	2.7	0.4	2.7	1.8	11.8	0.0	0.0		
Maserati	8.5	80	5.2	6.5	50.9	1.4	10.9	0.0	0.0	0.0	0.0	0.9	7.2	3.9	31.0	0.0	0.0		
Land Rover	3.9	98	6.4	4.1	48.2	0.0	0.0	0.5	5.4	0.0	0.0	3.7	44.0	0.2	2.4	0.0	0.0		



Top Ten: Overall

2013 Overall

Base: Household Owns Car

	WtdTot Score	Total Unaided Awareness	
	Index	Count	%
Toyota	145.4	920	59.8
Ford	120.4	1,202	78.1
Honda	108.6	710	46.2
Chevrolet	105.2	1,039	67.6
Tesla	88.0	116	7.5
Subaru	86.6	233	15.1
Mercedes-Benz	82.5	404	26.3
Volvo	80.4	275	17.9
Cadillac	77.8	372	24.2
BMW	73.4	411	26.7

2012 Overall

Base: Household Owns Car

	WtdTot Score
	Index
Toyota	140.7
Honda	124.9
Ford	117.1
Chevrolet	92.6
Mercedes-Benz	74.1
Volvo	72.3
Cadillac	62.5
BMW	61.0
Dodge	54.7
Hyundai	48.8



Top Ten: Quality

2013 Position in Factor Importance: Number One (90 points)

2013 Quality

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Toyota	22.6	920	59.8
Mercedes-Benz	20.7	404	26.3
Ford	19.4	1,202	78.1
Chevrolet	19.1	1,039	67.6
Honda	18.6	710	46.2
Cadillac	18.6	372	24.2
Lexus	13.3	269	17.5
Subaru	12.9	233	15.1
Buick	12.1	316	20.5
BMW	12.1	411	26.7

2012 Quality

Base: Household Owns Car

	Factor Score
	%
Honda	21.4
Toyota	21.3
Mercedes-Benz	19.1
Ford	18.6
Chevrolet	14.9
BMW	13.2
Cadillac	11.2
Lexus	10.4
Buick	9.8
Volvo	9.3



Top Ten: Safety

2013 Position in Factor Importance: Number Two (88 points)

2013 Safety

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Volvo	60.0	275	17.9
Subaru	29.8	233	15.1
Toyota	19.1	920	59.8
Ford	17.4	1,202	78.1
Honda	16.4	710	46.2
Chevrolet	15.4	1,039	67.6
Mercedes-Benz	13.8	404	26.3
GMC trucks	12.2	389	25.3
Buick	10.9	316	20.5
Cadillac	9.9	372	24.2

2012 Safety

Base: Household Owns Car

	Factor Score
	%
Volvo	53.1
Ford	18.8
Honda	17.6
Toyota	17.0
Subaru	15.3
Chevrolet	12.9
Mercedes-Benz	12.1
Tesla	10.6
Cadillac	8.3
Dodge	8.2



Top Ten: Performance

2013 Position in Factor Importance: Number Three (83 points)

2013 Performance

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Chevrolet	22.1	1,039	67.6
BMW	20.6	411	26.7
Ford	18.4	1,202	78.1
Audi	16.5	241	15.7
Lamborghini	16.0	121	7.8
Toyota	15.9	920	59.8
Ferrari	15.6	134	8.7
Porsche	14.8	150	9.8
Dodge	14.1	589	38.3
Subaru	12.6	233	15.1

2012 Performance

Base: Household Owns Car

	Factor Score
	%
Ferrari	20.4
BMW	20.3
Chevrolet	18.7
Ford	17.8
Honda	16.1
Porsche	14.4
Toyota	14.2
Dodge	14.1
Audi	13.1
Cadillac	11.5



Top Ten: Value

2013 Position in Factor Importance: Number Four (82 points)

2013 Value

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Toyota	25.3	920	59.8
Honda	21.4	710	46.2
Ford	20.3	1,202	78.1
Kia	18.4	303	19.7
Chevrolet	16.0	1,039	67.6
Subaru	15.7	233	15.1
Tesla	11.7	116	7.5
Hyundai	10.8	338	22.0
Volkswagen	10.3	277	18.0
Lamborghini	10.2	121	7.8

2012 Value

Base: Household Owns Car

	Factor Score
	%
Toyota	23.6
Honda	21.9
Ford	19.8
Hyundai	18.8
Chevrolet	16.0
Kia	10.8
Nissan	8.9
Mercedes-Benz	8.7
Dodge	7.4
Cadillac	7.3



Top Ten: Fuel Economy

2013 Position in Factor Importance: Number Five (81 points)

2013 Fuel Economy

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Toyota	40.2	920	59.8
Smart	32.9	71	4.6
Honda	25.7	710	46.2
Tesla	22.5	116	7.5
Volkswagen	20.4	277	18.0
Ford	18.1	1,202	78.1
Hyundai	12.8	338	22.0
Chevrolet	12.6	1,039	67.6
Kia	11.4	303	19.7
Nissan	10.7	430	27.9

2012 Fuel Economy

Base: Household Owns Car

	Factor Score
	%
Toyota	40.0
Honda	28.6
Smart	23.4
Ford	16.3
Chevrolet	13.7
Volkswagen	10.9
Hyundai	10.4
Tesla	10.3
Kia	10.2
Nissan	9.1



Top Ten: Design or Style

2013 Position in Factor Importance: Number Six (70 points)

2013 Design/Style

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
BMW	20.4	411	26.7
Cadillac	20.4	372	24.2
Audi	20.2	241	15.7
Mercedes-Benz	19.6	404	26.3
Chevrolet	17.6	1,039	67.6
Ford	17.1	1,202	78.1
Lexus	17.0	269	17.5
Ferrari	16.0	134	8.7
Tesla	15.0	116	7.5
Dodge	13.3	589	38.3

2012 Design/Style

Base: Household Owns Car

	Factor Score
	%
Audi	18.6
Cadillac	17.7
BMW	17.2
Lexus	16.9
Ford	15.8
Mercedes-Benz	15.4
Chevrolet	15.1
Dodge	13.1
Jaguar	12.0
Toyota	10.2



Top Ten: Technology or Innovation

2013 Position in Factor Importance: Number Seven (68 points)

2013 Technology/Innovation

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Tesla	33.9	116	7.5
Mercedes-Benz	19.7	404	26.3
Toyota	19.5	920	59.8
Ford	19.5	1,202	78.1
BMW	18.2	411	26.7
Cadillac	18.1	372	24.2
Audi	16.5	241	15.7
Lexus	16.5	269	17.5
Chevrolet	11.3	1,039	67.6
Acura	11.3	197	12.8

2012 Tech./Innov.

Base: Household Owns Car

	Factor Score
	%
Toyota	20.0
Mercedes-Benz	19.2
Cadillac	19.2
Ford	18.7
Lexus	16.0
Tesla	15.8
Honda	12.9
Chevrolet	11.5
BMW	11.1
Audi	11.0



Car Driven Most Often

- The top three makes accounted for more than 4 in 10 vehicles that consumers drive most often:
 - ✓ Ford (15.6% in 2013 vs. 14.5%)
 - ✓ Chevrolet (14.9% vs. 15.3%)
 - ✓ Toyota (11.1% vs. 12.2%)

- Six other brands posted a share of around 3% or more:
 - ✓ Honda (8.4% vs. 8.0%)
 - ✓ Dodge (6.4% vs. 7.1%)
 - ✓ Nissan (5.3% vs. 4.8%)
 - ✓ Buick (3.5% vs. 2.2%)
 - ✓ Chrysler (3.4% vs. 3.2%)
 - ✓ GMC trucks (3.1% vs. 2.1%)

AA6 - What is the make of the car that you drive MOST frequently?

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	%	%	%	%	%	%	%	%	%	%	%
Ford	15.6	18.4	12.7	15.7	15.6	17.4	13.3	14.2	20.3	13.7	15.1
Chevrolet	14.9	18.3	11.4	12.8	16.3	16.7	14.5	12.8	19.0	14.5	13.2
Toyota	11.1	10.5	11.8	11.0	11.1	9.1	11.4	12.9	8.3	11.9	11.4
Honda	8.4	8.2	8.6	10.5	6.3	6.5	8.8	6.6	6.3	8.0	12.0
Dodge	6.4	6.1	6.6	7.7	5.4	7.4	6.6	8.6	6.6	4.8	7.0
Nissan	5.3	5.9	4.7	4.4	6.0	5.1	6.1	4.2	1.8	8.0	5.1
Buick	3.5	2.9	4.0	2.8	4.2	5.4	1.7	1.5	4.7	3.9	3.0
Chrysler	3.4	2.3	4.6	3.0	4.1	4.4	3.2	3.2	6.4	2.6	2.2
GMC trucks	3.1	2.9	3.3	4.0	2.5	3.2	3.6	2.9	3.1	4.0	2.0
Hyundai	2.2	1.1	3.4	2.4	2.0	1.2	2.8	5.6	2.3	1.4	1.1
Volkswagen	2.1	1.6	2.7	3.0	1.3	1.4	2.9	3.4	2.4	1.8	1.5
Kia	1.9	1.2	2.5	1.1	2.6	2.0	1.6	1.1	1.5	2.7	1.4
Mazda	1.9	1.5	2.2	1.6	2.1	2.0	2.2	2.3	1.0	2.3	1.6
Cadillac	1.8	1.5	2.1	0.9	2.6	1.7	1.5	0.4	3.3	1.9	1.2
Subaru	1.7	2.4	0.9	1.9	1.3	0.9	2.5	2.1	0.8	0.6	3.7
Jeep	1.4	0.9	1.9	1.5	1.4	1.6	1.2	3.1	1.4	0.9	1.0
BMW	1.2	1.2	1.3	1.3	1.3	1.1	1.6	0.9	0.4	1.0	2.6
Mercedes-Benz	1.2	0.9	1.4	1.2	1.1	0.6	1.8	0.8	-	1.7	1.6
Lincoln	1.0	1.1	0.9	0.3	1.5	0.4	1.5	0.6	1.1	1.5	0.2
Lexus	1.0	0.8	1.1	0.7	1.2	0.3	1.2	1.5	0.5	0.8	1.1
Acura	0.8	1.1	0.4	0.8	0.8	0.6	0.9	1.3	0.4	0.8	0.8

AA6 - What is the make of the car that you drive MOST frequently? (cont.)

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	%	%	%	%	%	%	%	%	%	%	%
Volvo	0.6	0.3	0.9	0.7	0.7	0.5	0.9	1.6	-	0.8	0.3
Audi	0.6	0.9	0.3	0.9	0.3	0.2	1.3	1.0	-	0.8	0.6
Mitsubishi	0.5	0.5	0.5	0.5	0.5	0.3	0.6	0.7	0.5	0.4	0.3
Infiniti	0.4	0.2	0.6	0.2	0.5	0.4	0.5	0.9	0.2	0.4	0.1
Scion	0.3	0.2	0.5	0.5	0.2	0.3	0.5	-	0.2	0.7	0.1
Mini	0.1	0.3	-	0.2	0.0	0.1	0.2	0.4	-	0.2	-
Land Rover	0.1	0.1	0.2	0.2	0.1	0.2	0.1	-	0.2	0.2	-
Fiat	0.1	0.2	-	0.2	-	0.2	-	-	-	-	0.4
Ram trucks	0.1	0.2	-	0.1	0.1	0.1	-	0.3	-	-	0.2
Maserati	0.1	0.1	-	-	0.1	-	-	-	-	0.2	-
Jaguar	-	-	-	-	-	-	-	-	-	-	-
Porsche	-	-	-	-	-	-	-	-	-	-	-
Smart	-	-	-	-	-	-	-	-	-	-	-
Ferrari	-	-	-	-	-	-	-	-	-	-	-
Tesla	-	-	-	-	-	-	-	-	-	-	-
Bentley	-	-	-	-	-	-	-	-	-	-	-
Lamborghini	-	-	-	-	-	-	-	-	-	-	-
Rolls-Royce	-	-	-	-	-	-	-	-	-	-	-
Other	5.6	5.7	5.6	6.2	5.0	6.3	4.0	3.6	6.0	5.0	7.5
Don't know/Don't drive/None	1.8	0.4	3.2	1.6	2.0	2.0	0.8	1.3	1.2	2.4	1.7



New-Car Brand Most Likely to Purchase

- **Four makes dominate among those that consumers are most likely to purchase the next time they shop for a new car. Collectively, they were singled out by more than one-half of consumers who participated in this survey.**
 - ✓ Ford (17.1% in 2013 vs. 15.9% in 2012)
 - ✓ Toyota (13.6% vs. 12.5%)
 - ✓ Chevrolet (13.3% vs. 13.6%)
 - ✓ Honda (8.7% vs. 9.3%)
- **Gender differences:**
 - ✓ Men were more likely to focus on a Ford (20.4% vs. 13.6% women).
 - ✓ Women (10.5%) reported a stronger preference for Honda than men (7.0%).

AA7 - The next time that you are in the market for a new car, what brand are you most likely to purchase?

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	%	%	%	%	%	%	%	%	%	%	%
Ford	17.1	20.4	13.6	16.1	18.6	19.2	16.0	14.2	21.2	15.9	17.0
Toyota	13.6	12.2	15.0	15.8	11.4	11.8	13.7	14.4	9.3	13.3	17.4
Chevrolet	13.3	14.8	11.8	12.3	14.0	17.2	12.1	10.9	20.5	11.9	10.7
Honda	8.7	7.0	10.5	10.8	6.5	7.5	8.3	6.1	6.5	10.1	10.5
Nissan	3.9	3.1	4.7	4.0	4.0	3.9	4.9	5.1	1.9	4.9	3.3
Dodge	3.9	3.8	4.0	4.5	3.4	3.9	3.8	4.3	2.8	4.5	3.5
Subaru	2.5	3.5	1.4	3.2	1.8	1.7	3.2	3.7	2.2	0.5	4.8
Jeep	2.1	1.7	2.6	2.3	2.1	2.0	2.8	4.0	1.1	2.5	1.3
GMC trucks	2.0	2.8	1.2	2.1	2.1	1.3	2.8	1.8	2.1	2.9	0.8
Buick	1.9	2.1	1.7	0.7	3.2	2.5	1.3	1.9	1.8	2.6	1.0
Kia	1.9	1.1	2.7	0.9	2.9	2.6	1.7	1.7	0.5	2.6	2.3
BMW	1.8	2.6	1.1	1.7	1.7	1.1	2.3	3.1	0.7	1.4	2.6
Cadillac	1.8	1.9	1.6	0.9	2.7	2.1	1.5	1.2	1.5	2.7	1.2
Volkswagen	1.8	1.6	2.0	2.3	1.4	0.6	2.6	3.1	1.4	1.3	2.0
Audi	1.7	2.4	1.0	2.6	0.8	1.2	2.4	3.3	1.7	1.0	1.7
Hyundai	1.7	1.0	2.3	1.6	1.6	1.4	2.3	4.9	2.1	0.5	0.8
Mercedes-Benz	1.6	0.9	2.3	1.8	1.5	1.4	2.1	0.7	0.1	3.0	1.4
Chrysler	1.5	1.3	1.8	1.1	2.0	2.9	0.8	3.5	2.1	0.8	0.8
Mazda	1.2	0.9	1.4	0.6	1.7	1.0	1.2	0.4	1.9	1.6	0.5
Lexus	1.0	1.1	0.8	0.7	1.3	0.6	1.0	-	1.5	1.1	1.1
Volvo	0.8	0.3	1.3	1.0	0.6	0.4	1.0	0.5	0.3	0.8	1.2

AA7 - The next time that you are in the market for a new car, what brand are you most likely to purchase? (cont.)

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	%	%	%	%	%	%	%	%	%	%	%
Lincoln	0.7	0.7	0.8	0.2	1.1	0.5	1.1	0.4	0.8	1.1	0.4
Acura	0.7	0.9	0.4	0.8	0.6	0.6	1.0	1.1	-	0.6	1.0
Land Rover	0.4	0.1	0.7	0.7	0.2	0.6	0.1	0.7	-	0.2	1.0
Mitsubishi	0.4	0.3	0.5	0.6	0.2	0.3	0.4	-	0.6	0.7	-
Infiniti	0.3	0.4	0.3	0.4	0.3	0.4	0.3	0.8	0.7	0.0	0.1
Tesla	0.3	0.3	0.2	0.2	0.4	-	0.7	-	-	0.2	0.9
Mini	0.3	0.3	0.2	0.2	0.3	0.1	0.3	0.4	0.3	0.3	0.2
Fiat	0.2	0.2	0.2	0.5	-	0.5	-	-	0.5	-	0.4
Ram trucks	0.2	0.2	0.3	0.1	0.3	0.1	0.3	0.4	0.3	-	0.3
Jaguar	0.2	0.3	-	0.3	0.1	0.1	0.3	-	-	0.4	-
Lamborghini	0.2	-	0.3	0.3	-	-	0.4	-	-	0.4	-
Porsche	0.1	0.2	0.1	0.3	0.1	0.1	0.1	0.4	0.1	-	0.2
Rolls-Royce	0.1	-	0.2	-	0.2	-	0.3	-	-	-	0.4
Scion	0.1	0.1	0.1	-	0.2	0.1	0.1	-	0.5	-	-
Maserati	0.0	0.1	-	0.1	-	-	-	0.2	-	-	-
Bentley	0.0	0.1	-	-	0.1	-	0.1	0.2	-	-	-
Smart	-	-	-	-	-	-	-	-	-	-	-
Ferrari	-	-	-	-	-	-	-	-	-	-	-
Other	1.3	1.3	1.2	1.3	1.2	1.9	0.4	-	1.8	1.3	1.6
I do not buy cars/Don't drive	1.5	1.0	2.0	0.4	2.4	1.4	0.9	2.3	1.9	1.3	0.9
Don't know	7.3	6.7	7.9	6.8	7.1	7.0	5.2	4.5	9.4	7.6	6.9



Brand Loyalty

- Analysis of makes under consideration versus those currently driven yielded a calculation of brand loyalty. Relative to a year ago, Dodge registered the biggest change (down 19 percentage points).
 - ✓ Toyota retained its lead in calculated brand loyalty, with 6 in 10 of current Toyota drivers likely to purchase a Toyota for their next new car. Compared to the December 2012 study, brand loyalty fell 6 points for Toyota (from 66%).
 - ✓ Ford and Honda drivers finished in a tight pack in terms of calculated loyalty—56% are thinking about a new Ford (59% last year), and 54% will consider a Honda (56% last year).
 - ✓ Around 4 in 10 (41%) of Chevrolet owners expect to be loyal, down from 54% a year ago, while loyalty for Dodge fell to 25% from 44%.
- Among the top four brands, Toyota held a clear advantage over other brands. In the second tier, the competitive field is relatively flat. Essentially, the differences perceived by Ford and Honda buyers are narrow, because in the consumer’s mind, there are now a variety of very good choices for a new vehicle from these two makes. Chevrolet, level with Ford and Honda last year, dipped into the third tier.

AA7.1 - The next time that you are in the market for a new car, what brand are you most likely to purchase?

Base: Household Owns Car

	Make Currently Driven Most Often					
	Chevy	Dodge	Ford	Honda	Toyota	Other
UNWEIGHTED BASE	226	81	247	129	189	684
	%	%	%	%	%	%
Chevrolet	41	24	11	1	3	8
Dodge	5	25	4	-	1	2
Ford	11	11	56	9	5	11
Honda	6	6	2	54	5	5
Toyota	8	11	5	6	60	9
Other (Net)	23	16	14	20	16	57
I do not buy cars/Don't drive	1	1	2	1	1	1
Don't know	5	6	7	9	8	8



Other Brands Under Consideration

- Consumers were asked what other brands are on their consideration list for their next new car, in addition to the make they previously indicated being most likely to purchase.
- The leading brands were the same. Collectively, the top four were mentioned by nearly 6 in 10 of respondents:
 - ✓ Chevrolet (16.4%)
 - ✓ Ford (15.5%)
 - ✓ Toyota (14.1%)
 - ✓ Honda (12.3%)
- Two other makes are being considered by more than 1 in 20 consumers:
 - ✓ Dodge (8.4%)
 - ✓ Nissan (6.0%)

**AA8ALL - In addition to [MAKE] what other makes are you likely to consider for your next car?
Are there any other makes you will consider?**

Base: Buy Cars

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,548 %	820 %	728 %	476 %	1,031 %	600 %	625 %	265 %	342 %	565 %	376 %
Chevrolet	16.4	17.9	14.9	15.2	18.1	18.4	15.2	11.9	14.8	20.0	15.5
Ford	15.5	17.6	13.4	15.7	15.6	16.0	16.7	14.6	16.8	16.6	13.4
Toyota	14.1	15.4	12.7	13.9	14.6	13.0	15.1	12.4	13.2	12.9	17.6
Honda	12.3	12.1	12.7	14.4	10.5	14.7	11.7	12.8	11.6	12.2	12.8
Dodge	8.4	10.2	6.5	10.7	6.2	9.9	7.8	9.7	9.6	7.0	8.7
Nissan	6.0	5.8	6.2	7.0	5.2	5.0	7.8	6.8	2.9	6.5	7.4
BMW	4.4	5.5	3.3	5.1	3.6	4.0	5.5	4.3	1.4	5.2	6.1
Chrysler	4.3	4.3	4.3	3.7	4.7	5.3	4.0	0.8	6.7	3.5	5.5
Hyundai	3.7	4.2	3.1	3.6	3.8	2.4	5.7	3.7	2.7	3.0	5.4
Lexus	3.3	3.6	3.0	3.5	3.0	1.9	4.1	5.7	2.2	2.2	4.3
GMC trucks	3.2	3.0	3.3	3.2	3.3	2.9	4.3	2.4	5.3	2.5	2.7
Buick	3.1	2.6	3.7	1.2	5.1	3.0	3.0	3.1	4.4	2.6	2.9
Mercedes-Benz	3.1	3.7	2.6	3.4	3.0	2.7	4.0	6.0	0.9	2.9	3.6
Cadillac	2.7	3.0	2.3	2.1	3.2	1.7	3.1	4.8	1.9	2.1	2.7
Subaru	2.6	2.6	2.5	2.7	2.6	2.7	2.4	3.0	4.0	1.5	2.7
Jeep	2.3	1.5	3.1	2.8	1.9	2.0	1.9	3.0	1.4	2.7	2.0
Kia	2.3	2.2	2.3	1.9	2.5	1.0	3.8	2.0	4.1	0.9	2.8
Audi	2.0	2.0	2.0	2.2	1.8	1.6	2.8	2.9	0.2	2.1	2.9
Volkswagen	2.0	2.3	1.7	2.0	1.7	1.3	2.8	3.0	1.5	2.4	1.1
Mazda	1.9	1.6	2.3	2.7	1.3	1.8	2.3	3.1	2.2	1.5	1.5
Acura	1.8	2.1	1.4	1.9	1.7	1.3	1.9	1.7	0.3	1.3	3.8

**AA8ALL - In addition to [MAKE] what other makes are you likely to consider for your next car?
Are there any other makes you will consider? (cont.)**

Base: Buy Cars

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,548	820	728	476	1,031	600	625	265	342	565	376
	%	%	%	%	%	%	%	%	%	%	%
Volvo	1.5	1.0	2.1	1.8	1.3	1.0	2.3	3.2	1.6	1.4	0.6
Mitsubishi	1.1	0.8	1.5	2.1	0.2	1.5	1.0	0.5	0.6	1.1	2.1
Lincoln	0.9	0.8	1.0	1.1	0.8	0.6	1.7	1.6	1.5	0.5	0.5
Infiniti	0.8	1.4	0.2	1.1	0.6	0.2	1.2	0.9	-	0.9	1.4
Porsche	0.8	0.9	0.8	1.0	0.7	1.0	1.0	0.8	0.6	1.3	0.2
Ram trucks	0.5	0.6	0.4	0.6	0.4	0.1	1.2	-	0.4	0.6	0.6
Jaguar	0.5	0.4	0.5	0.4	0.5	0.4	0.5	1.1	0.1	0.4	0.5
Tesla	0.4	0.9	0.0	0.6	0.3	0.6	0.0	0.4	-	0.8	0.4
Mini	0.4	0.5	0.3	0.6	0.3	0.4	0.4	0.5	0.5	0.3	0.3
Scion	0.4	0.4	0.3	0.7	0.1	0.1	0.5	-	-	0.3	1.0
Bentley	0.3	0.1	0.5	0.5	0.1	0.1	0.2	1.6	0.3	-	-
Land Rover	0.3	0.4	0.3	0.7	-	0.3	0.5	-	-	0.4	0.7
Fiat	0.3	0.4	0.2	0.5	0.2	0.1	0.4	0.3	-	0.2	0.7
Smart	0.2	-	0.5	0.5	-	-	0.6	-	0.4	0.4	-
Lamborghini	0.2	0.3	0.1	0.1	0.1	0.3	-	-	0.3	0.4	-
Rolls-Royce	0.1	0.2	-	0.2	-	0.2	-	-	-	0.3	-
Ferrari	0.1	0.1	0.1	0.1	0.1	0.2	-	-	-	0.2	0.1
Maserati	0.0	-	0.1	-	0.1	-	0.1	-	-	-	0.1
Other	1.9	2.4	1.4	2.6	1.4	2.7	0.8	2.4	2.5	2.1	0.8
No other brands	5.5	5.3	5.6	3.8	6.6	5.9	4.1	3.1	8.2	4.3	6.3
Don't know	2.3	1.1	3.5	1.7	2.9	2.5	1.8	2.6	3.7	1.4	2.0



Total New-Car Brand Consideration

- **By a wide margin, the same four brands scored highest for total consideration, which is the sum of the scores for the two measures: the brand most likely to be purchased plus other brands likely to be considered.**
 - ✓ Ford (32.8%)
 - ✓ Chevrolet (29.6%)
 - ✓ Toyota (27.8%)
 - ✓ Honda (21.0%)

- **The second tier of brands trailed substantially:**
 - ✓ Dodge (12.3%)
 - ✓ Nissan (9.9%)

AA7,8ALL - Total Consideration

Base: Buy Cars

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,548	820	728	476	1,031	600	625	265	342	565	376
	%	%	%	%	%	%	%	%	%	%	%
Ford	32.8	38.3	27.2	31.8	34.7	35.5	32.9	29.1	38.5	32.7	30.6
Chevrolet	29.6	32.4	26.6	27.5	31.7	35.3	27.1	21.7	35.7	31.9	26.0
Toyota	27.8	27.6	27.9	29.8	26.0	24.8	28.8	26.9	22.6	26.4	34.9
Honda	21.0	18.8	23.4	25.2	16.8	21.8	20.1	19.0	18.3	21.9	23.4
Dodge	12.3	14.0	10.5	15.2	9.7	13.9	11.7	14.1	12.4	11.5	12.2
Nissan	9.9	8.9	11.0	11.0	9.2	8.9	12.7	12.0	4.9	11.5	10.7
BMW	6.3	8.2	4.4	6.9	5.4	5.1	7.8	7.4	2.2	6.6	8.8
Chrysler	5.8	5.6	6.1	4.8	6.8	8.2	4.7	4.4	8.8	4.4	6.3
Hyundai	5.4	5.2	5.5	5.2	5.5	3.8	8.0	8.8	4.9	3.6	6.2
GMC trucks	5.2	5.8	4.6	5.3	5.5	4.2	7.1	4.3	7.5	5.5	3.4
Buick	5.1	4.7	5.5	1.8	8.3	5.4	4.4	4.9	6.2	5.3	3.9
Subaru	5.1	6.2	3.9	5.9	4.5	4.5	5.7	6.8	6.2	2.0	7.5
Mercedes-Benz	4.7	4.6	4.9	5.2	4.5	4.1	6.0	6.7	1.1	5.9	5.0
Cadillac	4.5	5.0	3.9	3.0	6.0	3.8	4.7	6.0	3.4	4.8	3.9
Jeep	4.5	3.2	5.8	5.1	4.1	4.1	4.7	7.1	2.6	5.2	3.3
Lexus	4.3	4.7	3.8	4.1	4.3	2.4	5.1	5.7	3.7	3.3	5.3
Kia	4.2	3.3	5.1	2.9	5.5	3.6	5.5	3.7	4.5	3.6	5.1
Volkswagen	3.8	3.9	3.7	4.4	3.1	1.9	5.4	6.2	2.9	3.7	3.2
Audi	3.8	4.5	3.0	4.9	2.7	2.8	5.2	6.3	2.0	3.1	4.6
Mazda	3.1	2.5	3.7	3.2	3.1	2.8	3.5	3.5	4.1	3.1	2.0
Acura	2.4	3.0	1.8	2.7	2.3	1.9	2.9	2.8	0.3	1.9	4.8

AA7,8ALL - Total Consideration (cont.)

Base: Buy Cars

	Gender		Age		HHld Income		Factors				
	TOTAL	Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,548	820	728	476	1,031	600	625	265	342	565	376
	%	%	%	%	%	%	%	%	%	%	%
Volvo	2.3	1.2	3.4	2.8	1.9	1.4	3.3	3.8	1.9	2.2	1.9
Lincoln	1.7	1.5	1.8	1.3	2.0	1.1	2.8	2.0	2.3	1.7	0.9
Mitsubishi	1.5	1.1	2.0	2.7	0.5	1.9	1.4	0.5	1.2	1.8	2.1
Infiniti	1.1	1.8	0.5	1.5	0.9	0.6	1.5	1.7	0.7	0.9	1.5
Porsche	1.0	1.1	0.8	1.3	0.7	1.0	1.2	1.2	0.8	1.3	0.4
Land Rover	0.8	0.5	1.0	1.4	0.2	0.9	0.5	0.7	-	0.6	1.7
Tesla	0.7	1.2	0.2	0.8	0.7	0.6	0.8	0.4	-	0.9	1.3
Ram trucks	0.7	0.7	0.6	0.8	0.6	0.2	1.5	0.4	0.7	0.6	0.9
Mini	0.7	0.8	0.6	0.8	0.6	0.5	0.7	0.9	0.8	0.6	0.6
Jaguar	0.6	0.7	0.5	0.7	0.6	0.5	0.8	1.1	0.1	0.8	0.5
Fiat	0.5	0.6	0.4	0.9	0.2	0.6	0.4	0.3	0.5	0.2	1.1
Scion	0.5	0.5	0.4	0.7	0.3	0.2	0.6	-	0.5	0.3	1.0
Lamborghini	0.4	0.3	0.4	0.5	0.1	0.3	0.4	-	0.3	0.8	-
Bentley	0.4	0.2	0.5	0.5	0.2	0.1	0.3	1.9	0.3	-	-
Smart	0.2	-	0.5	0.5	-	-	0.6	-	0.4	0.4	-
Rolls-Royce	0.2	0.2	0.2	0.2	0.2	0.2	0.3	-	-	0.3	0.4
Ferrari	0.1	0.1	0.1	0.1	0.1	0.2	-	-	-	0.2	0.1
Maserati	0.1	0.1	0.1	0.1	0.1	-	0.1	0.2	-	-	0.1
Other	3.1	3.5	2.6	3.7	2.6	4.7	1.2	2.4	4.4	3.4	2.0
Don't know	9.6	7.8	11.5	8.5	10.0	9.5	6.9	7.1	13.3	9.1	8.7



Preference for Features

- Respondents were asked how likely they are to require that their next new car have a variety of features. Familiarity with most features was high, but more than 10% were *not familiar* with two features (electronic stability control, lane-departure warning).

- Half or more said they *definitely* or *probably would require* the following:
 - ✓ Side-curtain air bags (79%)
 - ✓ Blind-spot detection (65%)
 - ✓ Navigation (63%)
 - ✓ Forward-collision warning (58%)
 - ✓ A back-up camera (58%)
 - ✓ Electronic stability control (56%)
 - ✓ HID or LED headlamps (52%)
 - ✓ Bluetooth phone connectivity (51%)

- The two least-popular features fared the worst among older car owners (*probably* or *definitely would not require*):
 - ✓ Text-to-voice for texting, Facebook or Twitter (79% aged 45+ years vs. 70% aged 18-44 years)
 - ✓ Mobile WiFi, meaning the car provides Internet service (71% vs. 58%)

AA13ALL - How likely are you to require your next new car to have each of the following features? [4 boxes: Definitely Would Require...Definitely Would Not Require]

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	Definitely/Probably Would Require										
	%	%	%	%	%	%	%	%	%	%	%
Side-curtain air bags	79	79	78	79	78	75	83	78	75	81	80
Blind-spot detection	65	59	71	58	70	68	60	61	63	69	62
Navigation	63	61	65	65	61	64	62	65	58	64	64
Forward-collision warning	58	57	60	54	62	61	56	64	50	64	53
A back-up camera	58	56	60	55	60	56	60	55	54	60	60
Electronic stability control	56	66	46	55	56	53	56	62	50	58	54
HID or LED headlamps	52	57	47	55	48	52	51	49	48	55	52
Bluetooth phone connectivity	51	53	48	61	41	47	57	51	41	52	57
Lane-departure warning	40	42	38	33	46	41	38	39	35	45	38
Smart phone app integration	39	43	35	50	29	33	46	40	33	40	42
Telematic services, like OnStar	37	36	38	39	34	43	31	39	32	41	33
An anti-distraction tool, which limits phone use	34	33	35	34	32	38	31	41	25	39	29
Mobile WiFi, meaning the car provides Internet service	32	34	29	39	25	32	33	27	28	33	36
Text-to-voice for texting, Facebook or Twitter	22	25	19	28	16	21	24	20	21	24	22

AA13ALL - How likely are you to require your next new car to have each of the following features? [4 boxes: Definitely Would Require...Definitely Would Not Require]

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Region			
		Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	Probably/Definitely Would Not Require										
	%	%	%	%	%	%	%	%	%	%	%
Text-to-voice for texting, Facebook or Twitter	74	72	76	70	79	76	73	78	74	72	76
Mobile WiFi, meaning the car provides Internet service	65	63	67	58	71	64	64	71	68	63	61
Telematic services, like OnStar	60	62	59	59	62	53	67	57	67	57	61
An anti-distraction tool, which limits phone use	59	61	56	61	58	54	63	53	66	54	62
Smart phone app integration	53	51	56	46	61	58	49	51	62	51	52
Lane-departure warning	46	49	44	51	42	42	52	50	52	40	48
Bluetooth phone connectivity	46	44	47	37	54	49	41	45	56	43	41
A back-up camera	40	43	38	43	38	43	39	43	44	37	39
HID or LED headlamps	40	39	41	40	41	39	44	46	45	34	40
Forward-collision warning	36	39	32	40	32	33	41	32	45	30	39
Navigation	35	37	33	34	36	34	36	34	39	34	34
Blind-spot detection	31	38	23	37	25	27	37	33	32	27	33
Electronic stability control	25	25	25	26	25	26	27	22	32	22	26
Side-curtain air bags	18	20	17	18	19	21	16	21	22	16	17

AA13ALL - How likely are you to require your next new car to have each of the following features? [4 boxes: Definitely Would Require...Definitely Would Not Require]

Base: Household Owns Car

	Gender		Age		HHld Income		Region				
	TOTAL	Men	Women	18-44	45+	<\$50K	\$50K+	NEast	MWest	South	West
UNWEIGHTED BASE	1,578	831	747	478	1,057	613	631	272	351	574	381
	Not Familiar With										
	%	%	%	%	%	%	%	%	%	%	%
Electronic stability control	15	8	23	17	14	19	13	12	14	17	16
Lane-departure warning	11	7	15	13	9	14	8	9	9	13	12
HID or LED headlamps	6	3	9	4	8	7	3	3	4	8	6
An anti-distraction tool, which limits phone use	6	4	7	5	7	6	4	5	7	5	7
Smart phone app integration	5	4	7	3	8	8	3	4	4	7	5
Forward-collision warning	5	2	7	5	4	5	3	3	5	5	6
Blind-spot detection	4	2	5	4	4	4	1	4	5	3	5
Text-to-voice for texting, Facebook or Twitter	3	1	4	2	3	3	2	2	3	3	2
Bluetooth phone connectivity	3	2	3	1	4	3	1	3	1	4	2
Telematic services, like OnStar	3	2	3	1	4	4	1	3	1	2	5
Mobile WiFi, meaning the car provides Internet service	3	1	4	2	3	3	1	2	3	3	2
Side-curtain air bags	2	1	4	2	2	4	1	1	2	2	3
Navigation	1	1	2	0	2	1	1	1	2	1	1
A back-up camera	1	1	2	1	1	1	1	1	1	1	1



Profile

- **Women and men were equally represented in the poll, and the median age of respondents was 46 years.**
- **Overall, 29% of participants reported having at least a four-year college degree, but 39% had no education beyond high school.**
- **Median household income of interviewed consumers was \$48,000, and 36% said they are employed full time.**
- **Half of respondents (49%) said they are married, and three-quarters (74%) identified themselves as Caucasian.**

Profile

Base: Household Owns Car

	Gender		Region				
	TOTAL	Men	Women	NthEast	Midwest	South	West
UNWEIGHTED BASE	1,578	831	747	272	351	574	381
	%	%	%	%	%	%	%
<u>GENDER</u>							
Male	51	100	-	50	48	51	53
Female	49	-	100	50	52	49	47
<u>AGE</u>							
18-34	30	31	29	32	28	29	32
35-44	17	16	17	15	20	15	16
45-54	20	19	20	23	16	20	19
55-64	16	16	16	14	18	16	15
65+	15	15	16	14	16	16	14
Refused/Nr	3	3	3	2	2	3	4
MEDIAN (years)	45.9	45.3	46.4	45.7	45.5	46.8	43.9
<u>EDUCATION</u>							
Some HS or less	9	11	7	8	7	13	7
HS graduate	29	30	28	30	33	29	26
Some college	29	27	31	27	29	28	32
<i>College grad+ (Net)</i>	29	28	31	31	29	27	31
College grad	19	19	20	21	21	17	21
Postgrad degree	10	9	11	10	8	10	11
Refused/Nr	3	4	3	4	2	3	4
<u>HOUSEHOLD INCOME</u>							
Under \$25,000	15	15	15	14	17	17	11
\$25,000 but less than \$50,000	28	24	31	21	30	29	28
\$50,000 but less than \$75,000	14	16	12	17	14	13	14
\$75,000 but less than \$100,000	10	10	9	11	8	9	11
\$100,000 or more	14	16	12	13	15	13	14
Refused	20	18	22	23	16	19	22
MEDIAN (000s)	47.8	52.9	44.4	54.7	45.7	45.4	50.3

Profile (cont.)

Base: Household Owns Car

	Gender		Region				
	TOTAL	Men	Women	NthEast	Midwest	South	West
UNWEIGHTED BASE	1,578	831	747	272	351	574	381
	%	%	%	%	%	%	%
<u>EMPLOYMENT</u>							
Employed full time	36	44	28	42	38	32	37
Retired	23	22	23	18	24	26	19
Self-employed	10	11	8	10	6	10	11
Not currently employed	9	9	9	8	7	12	7
Employed part time	9	8	9	10	8	6	12
Homemaker	7	1	13	6	8	8	6
Student	6	5	8	6	8	5	7
Refused/Nr	1	0	1	1	1	1	0
<u>MARITAL STATUS</u>							
Married	49	49	48	51	50	49	47
Single and never been married	24	27	22	24	26	23	26
Divorced	9	8	9	9	5	10	9
Widowed	7	4	10	6	6	8	7
Living with a partner	6	6	6	5	9	5	5
Separated	2	2	2	3	2	2	2
Refused/Nr	3	3	3	2	2	2	5
<u>SPANISH/HISPANIC/LATINO</u>							
Yes	13	13	13	11	5	12	22
No	83	83	84	86	91	85	72
Refused/Nr	4	4	3	3	3	3	6
<u>RACE*</u>							
White/Caucasian	74	72	76	77	85	70	66
Black/African-American	10	11	10	7	7	14	8
Asian/Asian-American	2	2	2	4	1	1	3
Some other race	12	13	11	9	4	12	20
Refused/Nr	5	6	5	4	3	5	8

*Multiple responses allowed

Profile (cont.)

Base: Household Owns Car

	Gender		Region				
	TOTAL	Men	Women	NthEast	Midwest	South	West
UNWEIGHTED BASE	1,578	831	747	272	351	574	381
	%	%	%	%	%	%	%
REGION							
North East	16	16	17	100	-	-	-
Midwest	22	21	23	-	100	-	-
South	37	37	37	-	-	100	-
West	25	26	24	-	-	-	100



Appendix: December 2012 Results, Questionnaire

December 2012

Brand Perception Report*

Base: Household Owns Car

	WtdTot		Total Unaided			Design/Style		Performance		Quality		Safety		Tech./Innov.		Value		Fuel Economy		
	Score	Index	Count	%	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib
Toyota	140.7	140.7	1,152	67.9	10.2	7.0	14.2	9.7	21.3	14.6	17.0	11.6	20.0	13.7	23.6	16.1	40.0	27.3		
Honda	124.9	124.9	845	49.8	9.4	7.4	16.1	12.6	21.4	16.7	17.6	13.8	12.9	10.1	21.9	17.2	28.6	22.3		
Ford	117.1	117.1	1,438	84.7	15.8	12.5	17.8	14.2	18.6	14.7	18.8	14.9	18.7	14.9	19.8	15.8	16.3	13.0		
Chevrolet	92.6	92.6	1,217	71.7	15.1	14.7	18.7	18.2	14.9	14.5	12.9	12.6	11.5	11.2	16.0	15.5	13.7	13.3		
Mercedes-Benz	74.1	74.1	544	32.0	15.4	17.8	10.3	11.8	19.1	22.1	12.1	14.0	19.2	22.2	8.7	10.0	1.7	1.9		
Volvo	72.3	72.3	376	22.2	3.2	4.2	4.8	6.2	9.3	12.0	53.1	68.0	2.7	3.5	2.7	3.4	2.1	2.8		
Cadillac	62.5	62.5	499	29.4	17.7	22.7	11.5	14.7	11.2	14.3	8.3	10.7	19.2	24.6	7.3	9.3	2.9	3.7		
BMW	61.0	61.0	557	32.8	17.2	22.5	20.3	26.7	13.2	17.3	6.5	8.5	11.1	14.5	6.5	8.5	1.5	2.0		
Dodge	54.7	54.7	716	42.2	13.1	21.6	14.1	23.3	7.3	12.1	8.2	13.5	5.6	9.3	7.4	12.2	4.8	7.9		
Hyundai	48.8	48.8	480	28.3	4.7	9.3	2.4	4.8	5.2	10.3	4.0	7.8	5.2	10.2	18.8	37.1	10.4	20.5		
Tesla	46.9	46.9	83	4.9	5.6	9.9	5.5	9.7	3.8	6.8	10.6	18.7	15.8	27.8	5.1	8.9	10.3	18.2		
Lexus	46.8	46.8	398	23.4	16.9	27.6	7.6	12.5	10.4	17.0	5.0	8.3	16.0	26.3	4.5	7.4	0.5	0.9		
Subaru	46.5	46.5	306	18.0	4.3	8.5	7.0	13.9	8.5	16.8	15.3	30.3	3.5	7.0	7.1	14.1	4.7	9.3		
GMC trucks	44.9	44.9	509	30.0	6.8	14.1	7.8	16.4	8.1	17.0	7.4	15.4	5.9	12.3	5.5	11.4	6.3	13.2		
Audi	44.6	44.6	321	18.9	18.6	29.8	13.1	21.0	7.6	12.2	6.2	10.0	11.0	17.6	4.9	7.9	0.9	1.5		
Nissan	42.1	42.1	561	33.1	6.6	13.0	6.7	13.2	6.0	11.8	4.7	9.3	8.8	17.4	8.9	17.5	9.1	17.8		
Buick	39.6	39.6	436	25.7	8.1	18.1	6.3	14.2	9.8	22.1	6.9	15.4	5.6	12.7	6.5	14.6	1.3	2.9		
Volkswagen	35.2	35.2	370	21.8	3.8	9.5	4.0	10.0	5.3	13.4	6.3	15.8	5.1	12.9	4.3	10.8	10.9	27.6		
Kia	34.7	34.7	389	22.9	3.1	8.6	1.6	4.4	2.9	8.1	3.9	11.0	3.4	9.5	10.8	30.1	10.2	28.3		
Smart	34.2	34.2	104	6.1	3.4	7.8	0.8	1.8	2.6	5.9	5.3	12.1	4.9	11.2	3.2	7.3	23.4	53.8		
Lincoln	32.4	32.4	257	15.1	8.3	22.0	4.4	11.5	7.5	19.8	4.8	12.6	8.3	21.9	3.5	9.3	1.1	2.9		
Chrysler	30.2	30.2	687	40.5	10.0	26.2	4.6	12.0	6.1	16.1	4.0	10.5	5.8	15.2	4.3	11.3	3.3	8.6		
Ferrari	29.1	29.1	191	11.2	8.3	19.6	20.4	47.8	2.9	6.7	0.7	1.6	2.9	6.8	5.2	12.2	2.3	5.4		
Acura	23.9	23.9	267	15.8	5.0	14.5	5.0	14.5	4.6	13.4	4.6	13.5	6.8	20.0	3.9	11.3	4.4	12.8		
Infiniti	22.0	22.0	176	10.4	9.7	33.8	2.0	6.8	5.2	18.2	2.7	9.5	5.8	20.1	3.0	10.4	0.3	1.2		
Porsche	18.1	18.1	193	11.3	9.5	32.0	14.4	48.5	1.6	5.4	0.0	0.0	2.4	8.1	1.8	6.0	0.0	0.0		
Mazda	17.2	17.2	240	14.1	3.3	17.5	2.3	12.0	3.2	17.0	1.1	6.0	2.9	15.5	2.9	15.3	3.2	16.8		
Jeep	15.1	15.1	336	19.8	2.2	14.0	3.6	22.4	2.8	17.5	3.4	21.2	0.5	3.0	3.0	18.9	0.5	2.9		
Jaguar	14.5	14.5	206	12.1	12.0	49.1	4.1	16.7	2.9	12.0	1.6	6.4	1.0	3.9	2.4	9.7	0.5	2.2		
Land Rover	10.7	10.7	132	7.8	0.5	4.3	1.0	8.0	2.0	15.8	2.2	17.9	1.8	14.4	4.9	39.5	0.0	0.0		
Fiat	10.6	10.6	176	10.4	4.1	24.3	3.4	19.8	0.0	0.0	0.9	5.4	1.9	11.1	1.9	10.9	4.8	28.5		
Mini	9.7	9.7	97	5.7	2.4	18.7	0.5	4.2	0.0	0.0	0.8	6.7	3.1	24.8	1.9	15.3	3.8	30.3		
Scion	8.5	8.5	90	5.3	2.1	23.1	0.0	0.0	0.0	0.0	0.0	1.1	12.5	2.2	24.4	3.6	39.9			
Ram trucks	8.2	8.2	100	5.9	0.6	3.7	3.1	20.6	0.6	3.9	1.1	7.3	2.3	15.4	1.3	8.8	6.1	40.4		
Mitsubishi	3.8	3.8	204	12.0	3.0	35.9	2.0	24.0	0.4	4.4	1.3	15.8	1.3	15.0	0.0	0.0	0.4	4.9		

*Total Unaided Awareness = 3.0%+

On another subject...

AA1 Does your household own one or more cars?

- 01 YES
- 02 NO

IF OWN ONE OR MORE CARS, AA1 (01), CONTINUE. ALL OTHERS SKIP TO NEXT SECTION

AA2A

AA2C- OMITTED

AA3 There are several things that you may consider when shopping for a new car. I will read you a list of factors. I would like you to rate how important each factor is to you when shopping for a new car on a scale of 1 to 100, where 100 equals extremely important and 1 equals extremely unimportant. You can choose any number between 1 and 100 to indicate how you feel.

(RECORD NUMBER FOR EACH. RANGE IS 1-100, DON'T KNOW)
[RANDOMIZE ITEMS]

- A. Design or style
- B. OMITTED**
- C. Performance
- D. Quality
- E. Safety
- F. Technology or innovation
- G. Value
- H. Fuel economy

AA4 Thinking about all of the car makes sold in the U.S., which ones are you aware of?
(PROBE:) What other makes can you think of?
(INTERVIEWER NOTE: IF 'GM' OR 'GENERAL MOTORS' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'BUICK', 'CADILLAC' 'CHEVROLET' OR 'GMC TRUCKS.' IF 'DODGE' OR 'RAM' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'DODGE' OR 'RAM TRUCKS')
(DO NOT READ LIST. RECORD AS MANY AS APPLY)

- 01 ACURA
- 02 AUDI
- 44 BENTLEY
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 OMITTED
- 09 FORD
- 10 GMC TRUCKS
- 11 HONDA
- 12 OMITTED
- 13 HYUNDAI
- 14 INFINITI
- 15 OMITTED
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 45 LAMBORGHINI
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 46 MASERATI
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 OMITTED
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 OMITTED
- 31 OMITTED
- 43 RAM TRUCKS
- 47 ROLLS-ROYCE
- 32 SCION
- 33 SMART

- 34 SUBARU
- 35 OMITTED
- 42 TESLA
- 36 TOYOTA
- 37 VOLKSWAGEN
- 38 VOLVO
- 95 OTHER (SPECIFY)
- 99 DON'T KNOW/NONE

AA5 Thinking of all the car makes sold in the U.S., which ONE do you think is the leader in each of the following?

(INTERVIEWER NOTE: IF 'GM' OR 'GENERAL MOTORS' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'BUICK', 'CADILLAC' 'CHEVROLET' OR 'GMC TRUCKS.' IF 'DODGE' OR 'RAM' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'DODGE' OR 'RAM TRUCKS')

(DO NOT READ LIST. RECORD ONE ANSWER FOR EACH ITEM)

[RANDOMIZE ITEMS]

- 01 ACURA
- 02 AUDI
- 44 BENTLEY
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 OMITTED
- 09 FORD
- 10 GMC TRUCKS
- 11 HONDA
- 12 OMITTED
- 13 HYUNDAI
- 14 INFINITI
- 15 OMITTED
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 45 LAMBORGHINI
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 46 MASERATI
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 OMITTED
- 25 MINI
- 26 MITSUBISHI

- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 OMITTED
- 31 OMITTED
- 43 RAM TRUCKS
- 47 **ROLLS-ROYCE**
- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 OMITTED
- 42 TESLA
- 36 TOYOTA
- 37 VOLKSWAGEN
- 38 VOLVO
- 95 OTHER (SPECIFY)
- 99 DON'T KNOW/NONE

- A. Design or style
- B. **OMITTED**
- C. Performance
- D. Quality
- E. Safety
- F. Technology or innovation
- G. Value
- H. Fuel economy

AA6 What is the make of the car that you drive MOST frequently?
(INTERVIEWER NOTE: IF 'GM' OR 'GENERAL MOTORS' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'BUICK', 'CADILLAC' 'CHEVROLET' OR 'GMC TRUCKS.' IF 'DODGE' OR 'RAM' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'DODGE' OR 'RAM TRUCKS')
(DO NOT READ LIST. RECORD ONE ANSWER)

- 01 ACURA
- 02 AUDI
- 44 **BENTLEY**
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 **OMITTED**
- 09 FORD
- 10 GMC TRUCKS
- 11 HONDA
- 12 OMITTED

- 13 HYUNDAI
- 14 INFINITI
- 15 OMITTED
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 45 LAMBORGHINI
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 46 MASERATI
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 OMITTED
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 OMITTED
- 31 OMITTED
- 43 RAM TRUCKS
- 47 ROLLS-ROYCE
- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 OMITTED
- 42 TESLA
- 36 TOYOTA
- 37 VOLKSWAGEN
- 38 VOLVO
- 95 OTHER (SPECIFY)
- 99 DON'T KNOW/DON'T DRIVE/NONE

AA7 The next time that you are in the market for a new car, what make are you MOST LIKELY TO PURCHASE?

(INTERVIEWER NOTE: IF 'GM' OR 'GENERAL MOTORS' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'BUICK', 'CADILLAC' 'CHEVROLET' OR 'GMC TRUCKS.' IF 'DODGE' OR 'RAM' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'DODGE' OR 'RAM TRUCKS')

(DO NOT READ LIST. RECORD ONE ANSWER)

- 01 ACURA
- 02 AUDI
- 44 BENTLEY
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER

- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 OMITTED
- 09 FORD
- 10 GMC TRUCKS
- 11 HONDA
- 12 OMITTED
- 13 HYUNDAI
- 14 INFINITI
- 15 OMITTED
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 45 LAMBORGHINI
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 46 MASERATI
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 OMITTED
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 OMITTED
- 31 OMITTED
- 43 RAM TRUCKS
- 47 ROLLS-ROYCE
- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 OMITTED
- 42 TESLA
- 36 TOYOTA
- 37 VOLKSWAGEN
- 38 VOLVO
- 95 OTHER (SPECIFY)
- 98 I DO NOT BUY CARS/DON'T DRIVE
- 99 DON'T KNOW

[ASK IF AA7 (01-95). DO NOT SHOW ANSWER FROM AA7 (01-47)]

AA8 In addition to [INSERT ANSWER, AA7 (01-95)], what other makes are you likely to consider for your next new car?

(PROBE:) Are there any other makes you will consider?

(INTERVIEWER NOTE: IF 'GM' OR 'GENERAL MOTORS' MENTIONED, ASK RESPONDENT TO CLARIFY WHETHER THEY MEAN 'BUICK', 'CADILLAC' 'CHEVROLET' OR 'GMC TRUCKS.' IF 'DODGE' OR 'RAM' MENTIONED, ASK

RESPONDENT TO CLARIFY WHETHER THEY MEAN 'DODGE' OR 'RAM TRUCKS')

[DO NOT READ LIST. RECORD AS MANY AS APPLY]

- 01 ACURA
- 02 AUDI
- 44 BENTLEY
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
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- 41 OMITTED
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- 11 HONDA
- 12 OMITTED
- 13 HYUNDAI
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- 15 OMITTED
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 45 LAMBORGHINI
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 46 MASERATI
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 OMITTED
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 OMITTED
- 31 OMITTED
- 43 RAM TRUCKS
- 47 ROLLS-ROYCE
- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 OMITTED
- 42 TESLA
- 36 TOYOTA
- 37 VOLKSWAGEN
- 38 VOLVO

- 95 OTHER (SPECIFY)
- 98 NO OTHER BRANDS
- 99 DON'T KNOW

AA9-
AA10 OMITTED

A11-
A12 OMITTED

AA13 How likely are you to require your next new car to have each of the following features? Do you think you (definitely would require, probably would require, probably would not require, or definitely would not require each?) (definitely would not require, probably would not require, probably would require or definitely would require each?) If you are not familiar with any of the following features, please tell me.

[RANDOMIZE ITEMS]

[ROTATE 01-04 TOP TO BOTTOM, BOTTOM TO TOP ALONG WITH QUESTION WORDING]

- 01 Definitely would require
- 02 Probably would require
- 03 Probably would not require
- 04 Definitely would not require
- 98 NOT FAMILIAR WITH FEATURE
- 99 DON'T KNOW

- A. An anti-distraction tool, which limits phone use
- B. A back-up camera
- C. Blind-spot detection
- D. Bluetooth phone connectivity
- E. Electronic stability control
- F. Forward-collision warning
- G. HID or LED headlamps
- H. Lane-departure warning
- I. Mobile WiFi, meaning the car provides Internet service
- J. Navigation
- K. Side-curtain air bags
- L. Smart-phone app integration
- M. Telematic services, like OnStar
- N. Text-to-voice for texting, Facebook or Twitter