QuestionPro Eyes4Research

U.S. Automobile Consumer Study 2021 Q1 2021

A study of U.S. automobile purchasing intent and awareness during the COVID-19 pandemic

Objectives and Methodology

Objectives

The objectives of this research are to obtain insights on consumer vehicle shopping during the COVID pandemic. Insights obtained include their awareness of brand manufacturers, perceptions of those brands, details on their current vehicle, plans and needs for their next vehicle, and how COVID-19 may or may not impact their decision-making process.

Methodology

Technique:	• Online survey
Audience:	• Survey conducted using an online panel • People 18 years of age or older, who currently own and drive a vehicle, and are looking to purchase a new or used vehicle in the next 12 months.
Geography:	• United States
Length:	• 10 minutes • Survey fielded: January 11 - February 31, 2021
Sample size:	• 3000
Reliability:	• Sample sizes produces a margin of error of ± 2% at a 95% confidence level.

Summary of findings - Awareness and Brand Perceptions

Brand awareness

- Overall awareness was 70% or higher for twenty-five of the thirty-three brands included in the study.
- Ford, Chevrolet, Honda, Toyota and BMW have the highest overall brand awareness.
- Brands with the lowest awareness include Alfa Romeo, Fiat, Ram Trucks and Mini Cooper.
- Ford, Chevrolet, Honda, Toyota and BMW have the highest brand awareness with a few exceptions in certain demographic segments
  - From an age perspective, brand awareness scores were generally higher for people who were age 45 years or older.
  - From a gender perspective, brand awareness scores were generally higher for women.
  - Honda has the highest brand awareness with Hispanics/Latinos respondents
  - Toyota and Honda have the highest brand awareness with Asian respondents
  - Automobile brand awareness is generally higher for Caucasian respondents
  - Automobile brand awareness is generally lower for respondents with a HH income lower than $60,000 per year
  - Compared to all other segments, BMW ranks highest in awareness with respondents having a HH income over $100K per year.

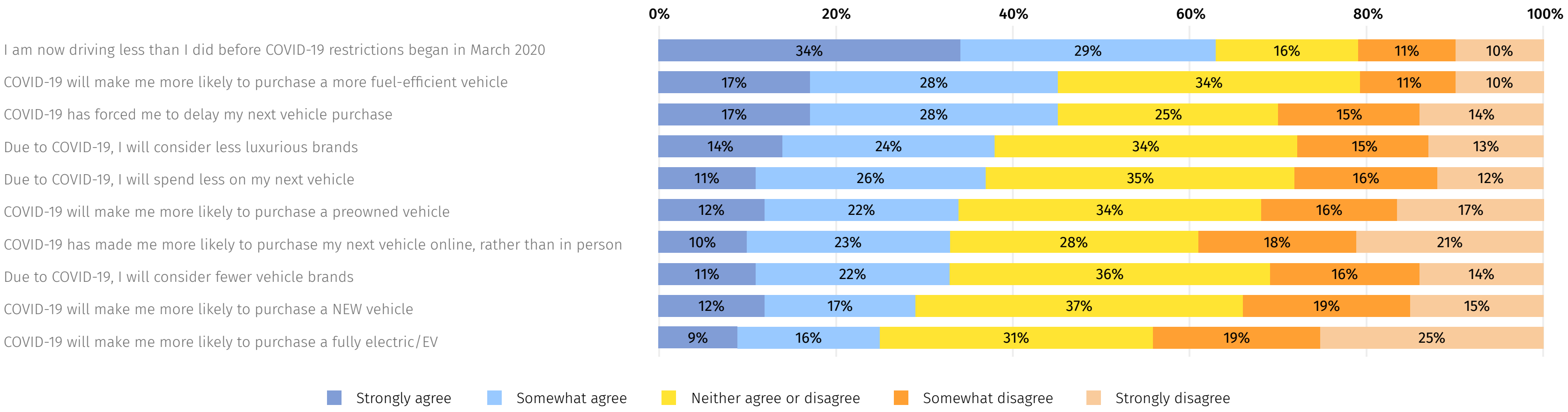
Methodology

- High-end performance and luxury brands are perceived to offer the highest overall quality and brands receiving the highest quality scores include Mercedes Benz, BMW, Lexus, Porsche and Audi.
- Practical automobile brands (e.g., Buick, Chevrolet, Ford, GMC , Hyundai) are mostly perceived to offer average overall quality.

Summary of findings - How COVID impacts their next vehicle purchase

How much they agree or disagree with statements regarding the impacts COVID will have on their next vehicle purchase (top-two and bottom-two boxes on a five-point scale):

- Most respondents (63%) AGREE (strongly or somewhat) that they are driving less since COVID restrictions began.
- Less than half (45%) AGREE that COVID will make them more likely to purchase a more fuel-efficient vehicle.
- Less than half (45%) also AGREE that COVID-19 has forced them to delay their next vehicle purchase.
- About two-fifths (38%) AGREE that they will spend less on their next vehicle because of COVID.
- Less than two-fifths (37%) DISAGREE (strongly or somewhat) that they will purchase their next car online because of COVID.
- More than two-fifths (44%) DISAGREE that COVID will make them more likely to purchase a fully electric vehicle

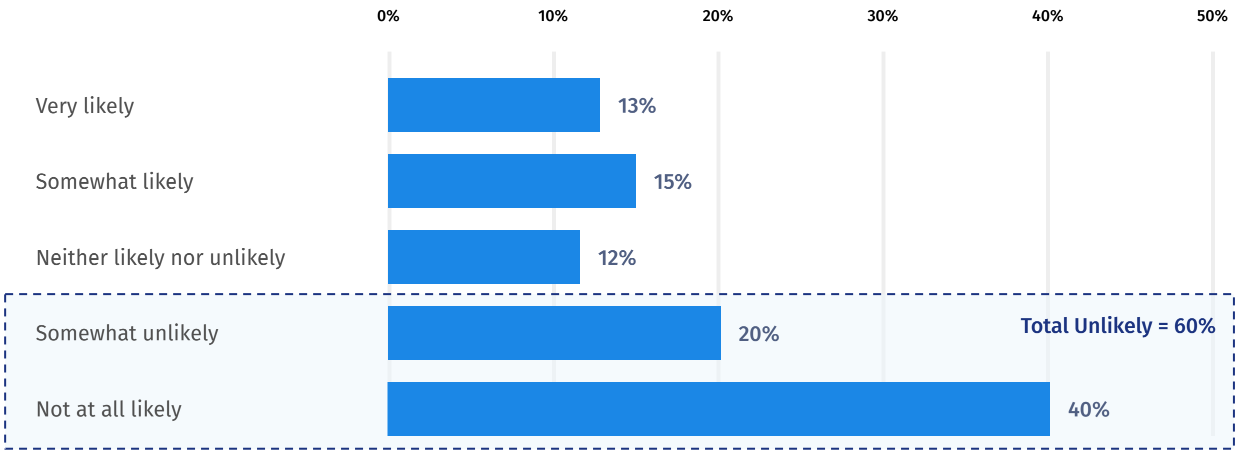


Summary of findings - How COVID impacts online vehicle purchasing

Likelihood to buy their car online, due to COVID:

- Three-fifths (60%) were either "somewhat unlikely" or "not at all likely" to purchase online without first seeing or test driving the vehicle.
- Less than two-thirds (64%) said COVID restrictions have not made them more open to purchasing online without first seeing or test driving the vehicle.

How likely are you to make an online vehicle purchase without seeing or test driving the vehicle before making the purchase?



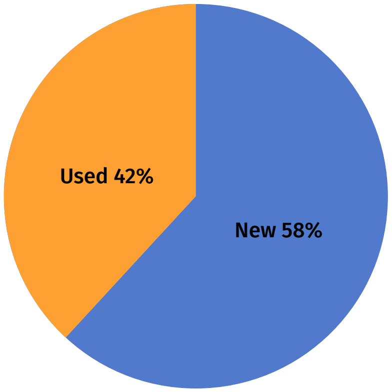
N = 3000

Summary of findings - Next vehicle purchase plans

Shopping Methods, Spend and Purchase Influences:

- About three-fifths (58%) plan on buying a new vehicle (vs used).
- About three-fifths (57% - 58%) plan to browse and search for their next car using online search engines like Google, car buying apps and websites, and local dealership websites.
- Two-thirds plan to spend less than $35,000 and more than two-fifths (44%) will spend less than $25K on their next vehicle purchase.
- Over half (54%) will finance their next vehicle purchase through a bank/credit union or directly through the dealership, and more than one-fourth (28%) plan to use personal savings.
- Respondents believe “overall price” (59%), “overall value for the money” (58%), “the build quality of the vehicle” (50%) and “fuel efficiency” (48%) will be main purchase influences.
- The likelihood of purchasing a vehicle built in the US is much higher than any other country.
- Toyota, Chevrolet, Ford, Honda and Jeep ranked highest for the ONE brand they will most likely purchase next.

Thinking about your next vehicle purchase, will you most likely purchase a new or used vehicle? Please select one:



Summary of findings - Next vehicle purchase plans

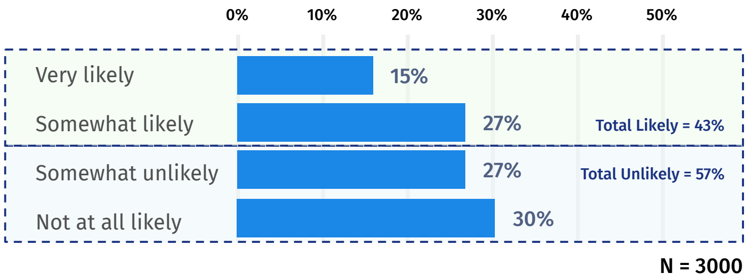
Desired vehicle type, features, motor, colors, etc.

- About one-fourth (24%) want a mid-sized SUV and less than one-fifth (18%) want a mid-sized sedan as their next vehicle.
- About one-fourth (23%) would prefer some type of 4-cylinder motor and another one-third (34%) would some type of 6-cylinder motor.
- Less than half (45%) want all-time, all wheel drive (AWD) and another one-fifth want front wheel drive.
- Most respondents view automatic transmission (61%), Bluetooth connectivity (60%), low tire pressure warning (60%), USB device charging (60%), In-Dash GPS/navigation with backup screen (53%), keyless entry (52%), and heated seats (51%), as "MUST HAVE" features.
- Respondents believe "overall price" (59%), "overall value for the money" (58%), "the build quality of the vehicle" (50%) and "fuel efficiency" (48%) will be main purchase influences.
- Over one-fourth (29%) want the exterior color of their next vehicle to be black.

EV interest and willingness to spend

- Less than three-fifths (57%) were either somewhat unlikely or not at all likely to pay for a fully electric vehicle.
- For those who were either "very' or "somewhat" likely (43%) to purchase a fully electric vehicle, a majority (79%) said they are willing to pay more for an electric vehicle having the same features, functions and amenities as a gasoline powered vehicle.

How likely would you be to pay for a fully electric vehicle?



Summary of findings - Current vehicle owner feedback

- About one fifth (19%) currently own a mid-sized SUV and about one-fifth (21%) currently own a mid-sized sedan
- 72% of respondents own and mostly drive one of the 10 brands below.
- Hyundai received the highest owner reliability rating, followed closely by Toyota.
- Toyota received the highest overall owner satisfaction rating, followed closely by Hyundai, BMW, and Kia.
- Toyota owners are more likely to replace their current vehicle with another Toyota.
- Kia's Net Promotor Score of 45 was the highest.

Vehicle Brand they Own and Mostly Drive	Count (N=2149)	Ownership Percentage	Overall Reliability (Excellent/Good)	Overall Satisfaction (Excellent/Good)	Likelihood to Replace Current Brand w/same Brand (Very/Somewhat)	Net Promotor Score (NPS)
Ford	384	13%	80%	82%	73%	16%
Chevrolet	354	12%	87%	87%	78%	27%
Toyota	331	11%	94%	92%	82%	43%
Honda	303	10%	91%	89%	79%	41%
Nissan	166	6%	90%	87%	67%	21%
Hyundai	137	5%	96%	91%	78%	30%
Dodge	135	4%	82%	81%	71%	10%
Jeep	135	4%	89%	88%	74%	38%
BMW	112	4%	89%	90%	71%	45%
Kia	92	3%	90%	90%	70%	49%

Automobile brand awareness by age and gender

Ford, Chevrolet, Honda, Toyota and BMW have the highest brand awareness with a few exceptions in certain segments

- From an age perspective, brand awareness scores were generally higher for people who were age 45 years or older.
- From a gender perspective, brand awareness scores were generally higher for women.

Age: Under 45 (N=1513)		Age: 45+ (N=1487)	
Ford, Honda, Chevrolet	71%*	Ford	87%
Toyota, BMW	69%*	Chevrolet	86%
Jeep	66%	Toyota	85%
Audi, Nissan, Cadillac, Dodge	65%*	Honda, Cadillac	84%*
Mercedes Benz, Lexus, Tesla, Acura, Hyundai, Kia	63%-64%*	BMW, Nissan, Jeep, Dodge, Audi, Buick, Mercedes Benz, Acura, Mazda, GMC, Hyundai	82%-83%*

Male (N=1399)		Female (N=1590)	
Ford, Chevrolet, Toyota	77%*	Ford	81%
Honda	76%	Chevrolet	80%
BMW	75%	Honda	79%
Audi	73%	Toyota	78%
Acura, Nissan, Cadillac, Mercedes Benz, Jeep, Tesla, Lexus	71%-72%*	BMW, Jeep, Cadillac, Dodge, Nissan	76%-77%*

* Percentage applies to each brand and is not a cumulative total.

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Vehicle Brand Awareness

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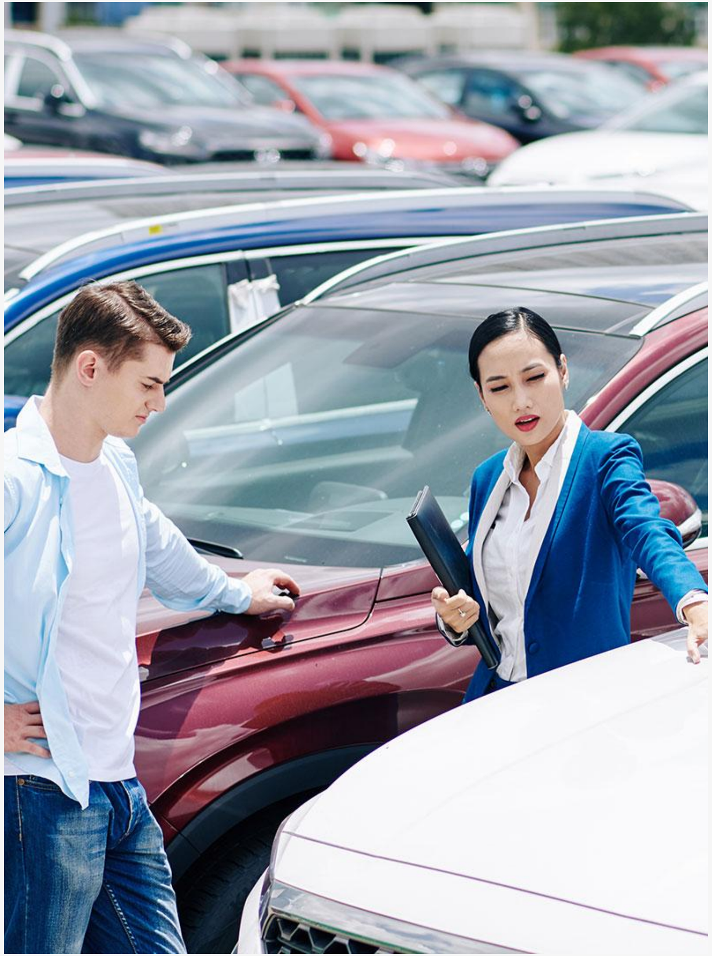
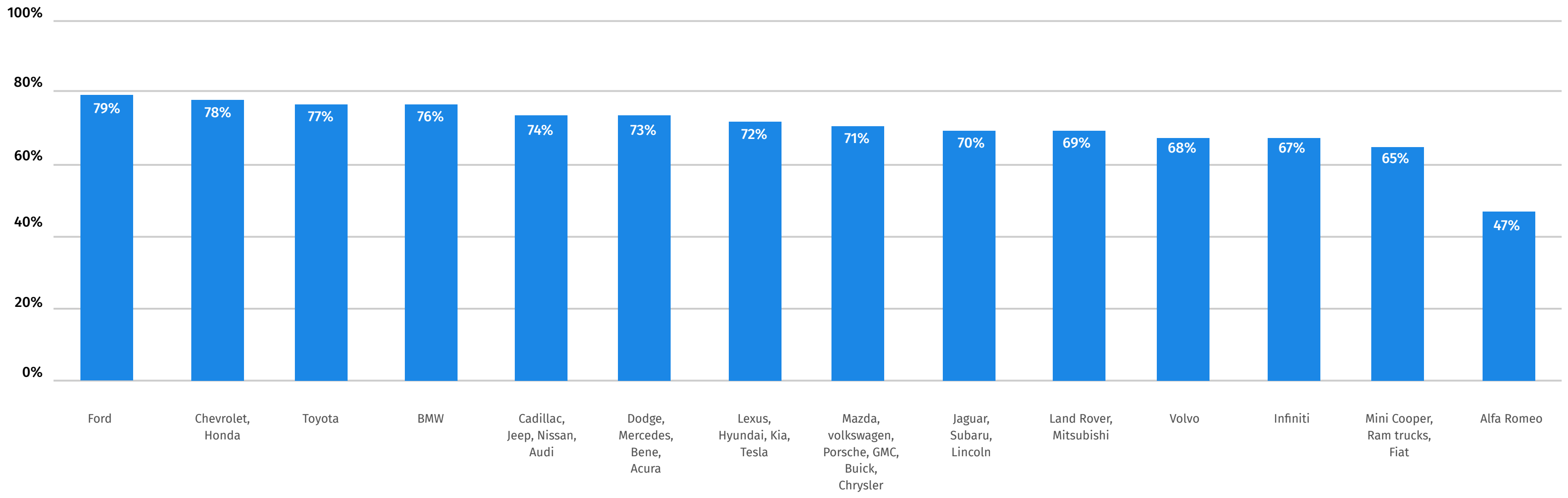


Automobile brand overall awareness

- Overall awareness was 70% or higher for twenty-five of the thirty-three brands.
- Ford, Chevrolet, Honda, Toyota and BMW have the highest overall brand awareness with scores ranging between 79%-76%.
- Brands with the lowest brand awareness include Alfa Romeo, Fiat, Ram Trucks and Mini Cooper.



Automobile brand awareness by ethnicity

Ford, Chevrolet, Honda, Toyota and BMW have the highest brand awareness with a few exceptions in certain segments.

- Honda has the highest brand awareness with Hispanics/Latinos respondents
- Toyota and Honda have the highest brand awareness with Asian respondents
- Automobile brand awareness is generally higher for Caucasian respondents

Latino/Hispanic (N=309)		Asian (N=143)		African American/Black (N=319)		Caucasian/White (N=2388)	
Honda	71%	Toyota	75%	Chevrolet	66%	Ford	82%
Ford	68%	Honda	71%	Honda	65%	Chevrolet	81%
Chevrolet, BMW	66%*	Ford	70%	Ford, Cadillac	63%*	Honda, Toyota	80%*
Toyota	65%	BMW	69%	BMW, Toyota	62%*	BMW	78%
Cadillac, Jeep, Lexus, Audi, Nissan	62%-63%*	Tesla, Audi, Mercedes Benz	65%-66%*	Buick, Dodge, Audi	60%-61%*	Jeep, Nissan, Cadillac, Audi, Dodge, Hyundai, Mercedes Benz, Acura	76%-77%*

* Percentage applies to each brand and is not a cumulative total.

Automobile brand awareness by household income

Ford, Chevrolet, Honda, Toyota and BMW have the highest brand awareness with a few exceptions in certain segments.

- Automobile brand awareness is generally lower for respondents with a HH income lower than $60,000 per year
- Compared to all other segments, BMW ranks highest in awareness with respondents having a HH income over $100K per year.

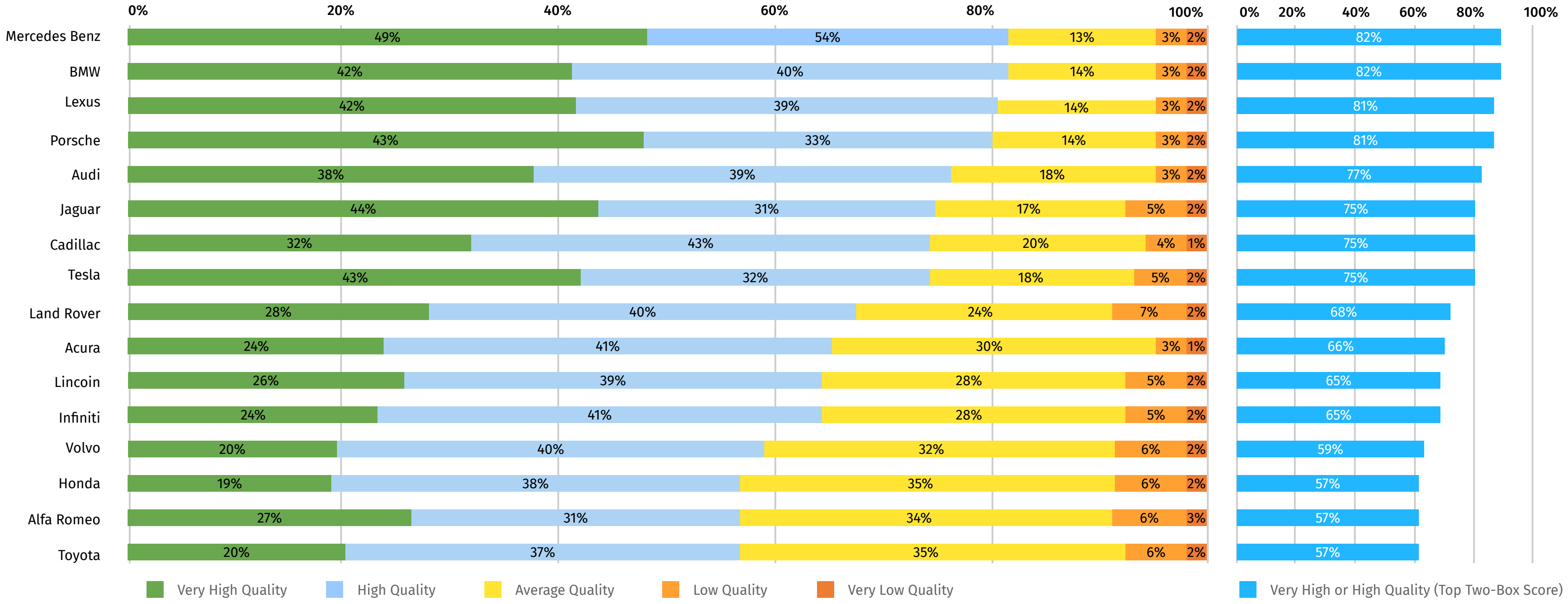
HH Income: Under $60,000/year (N=1097)		HH Income: Between $60K - $100K/year (N=934)		HH Income: Over $100K/year (N=969)	
Ford, Chevrolet	74%*	Ford	82%	Toyota	83%
Honda	73%	Chevrolet, Honda	81%*	BMW	82%
Toyota	71%	BMW, Toyota	79%*	Ford	81%
Dodge	70%	Dodge, Jeep, Cadillac	78%*	Chevrolet, Honda	80%*
Cadillac, Jeep, Nissan, BMW	68%-69%*	Audi, Nissan, Acura, Buick. Hyundai, Mercedes Benz	76%-77%*	Mercedes Benz, Audi, Tesla, Acura, Nissan	78%-79%*

* Percentage applies to each brand and is not a cumulative total.

VEHICLE QUALITY AND VALUE PERCEPTIONS

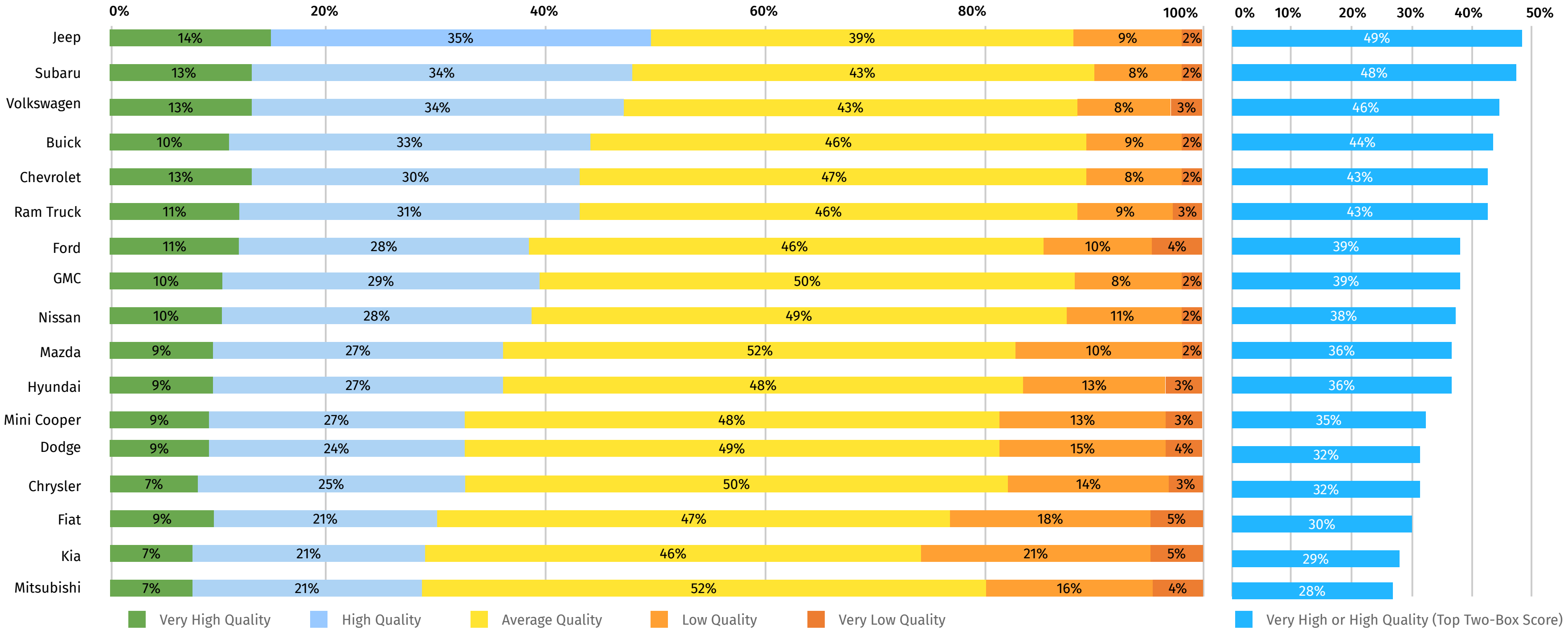
Quality perceptions - "High" quality brands

High-end performance and luxury brands are perceived to offer the highest overall quality, and brands receiving the highest quality scores include Mercedes Benz, BMW, Lexus, Porsche and Audi.



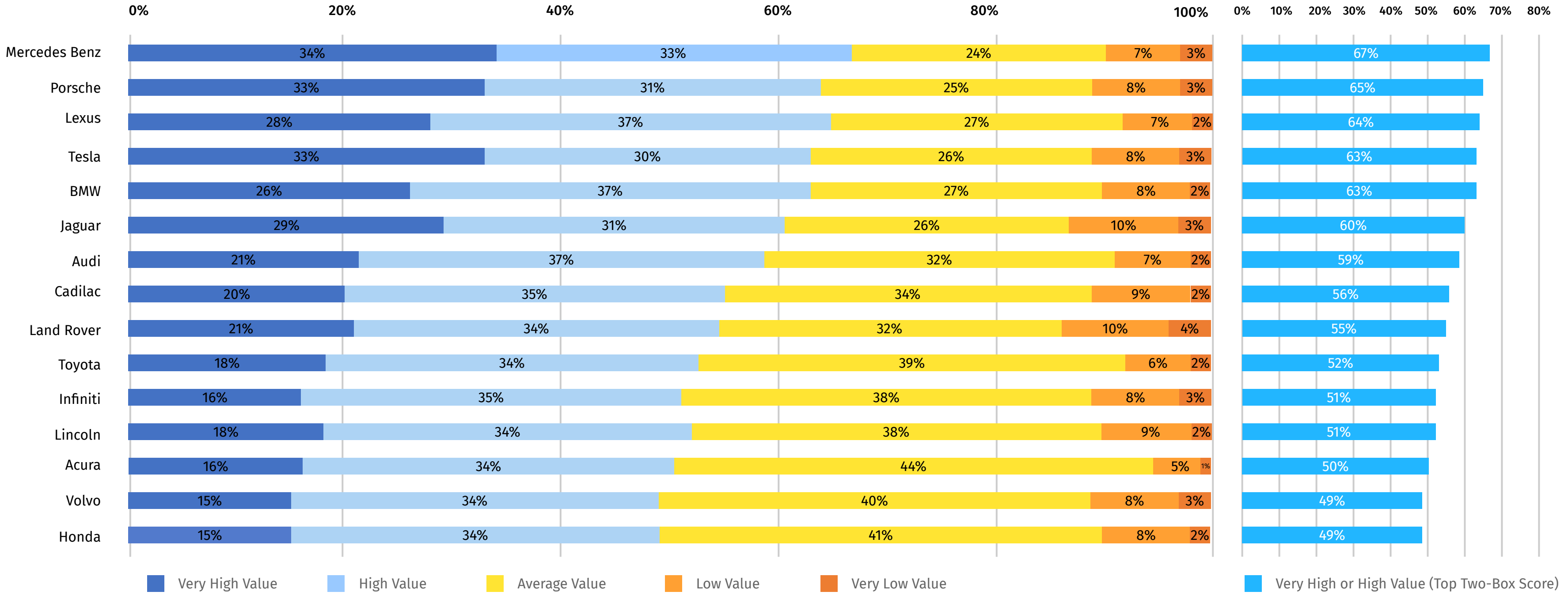
Quality perceptions - “Average” quality brands

Practical brands are perceived to offer more average levels of quality, as their “Average Quality” scores are higher than their combined ‘Very High/High quality” scores. This does exclude Jeep, Subaru and Volkswagen.



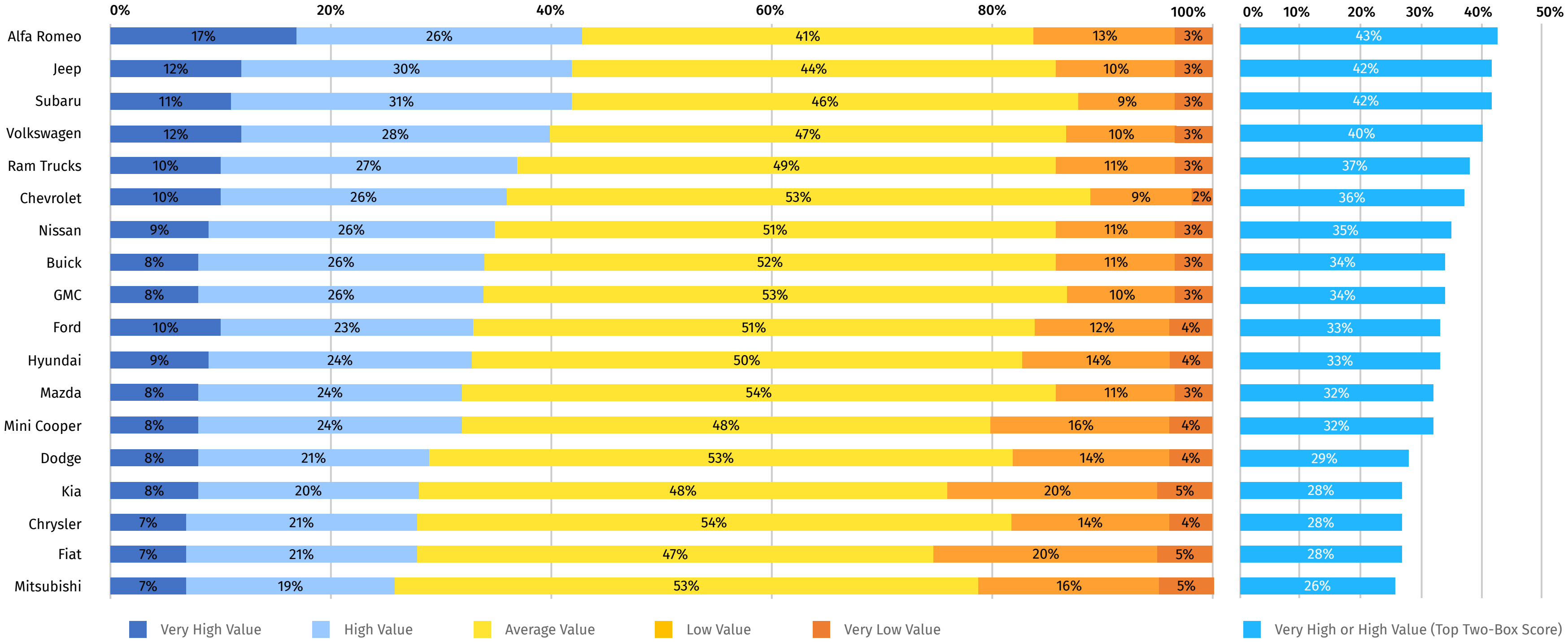
Value perceptions - “High” value brands

High-end performance and luxury brands are perceived to offer the highest value for money, and brands receiving the highest value scores include Mercedes Benz, Porsche, Lexus, Tesla and BMW.



Quality perceptions - “Average” value brands

Practical brands are perceived to offer more average levels of value, as their “Average Value” scores are higher than their combined ‘Very High/High Value” scores.



THE IMPACT OF COVID-19 ON THE CAR PURCHASING EXPERIENCE

	Agree (Strongly or Somewhat)	Neither Agree or Disagree	Disagree (Somewhat or Strongly)	How COVID-19 impacts their next vehicle purchase
I am now driving less than I did before COVID-19 restrictions began in March 2020.	63%	16%	21%	Most respondents (63%) AGREE that they are driving less since COVID restrictions began
COVID-19 will make me more likely to purchase a more fuel-efficient vehicle.	45%	34%	21%	Less than half (45%) AGREE that COVID will make them more likely to purchase a more fuel-efficient vehicle.
COVID-19 has forced me to delay my next vehicle purchase.	45%	25%	29%	Less than half (45%) also AGREE that COVID-19 has forced them to delay their next vehicle purchase.
Due to COVID-19, I will consider less luxurious brands.	38%	34%	28%	About two-fifths (38%) AGREE that COVID will they will consider less luxurious brands.
Due to COVID-19, I will spend less on my next vehicle.	37%	35%	28%	Less than two-fifths (37%) AGREE that they will spend less on their next vehicle because of COVID.
COVID-19 will make me more likely to purchase a preowned vehicle.	34%	34%	32%	The percentage of those who agree, disagree or remained neutral were similar regarding their likelihood to purchase a preowned vehicle because of COVID.
COVID-19 has made me more likely to purchase my next vehicle online, rather than in person.	33%	28%	39%	About two-fifths (39%) DISAGREE that they will purchase their next car online because of COVID.
Due to COVID-19, I will consider fewer vehicle brands.	33%	36%	31%	Over one-third (36%) NEITHER AGREE or DISAGREE that that they consider fewer vehicle brands because of COVID..
COVID-19 will make me more likely to purchase a NEW vehicle.	29%	37%	34%	Over one-third (37%) NEITHER AGREE or DISAGREE that COVID would make them more likely to purchase a new vehicle.
COVID-19 will make me more likely to purchase a fully electric vehicle (EV).	25%	31%	44%	Over two-fifths (44%) DISAGREE that COVID will make them more likely to purchase a fully electric vehicle.

COVID-19 impacts - Age and Gender

As a result of COVID:

- Males are MORE likely than females to agree that they will purchase a new vehicle or a fully electric vehicle.
- Females are MORE likely than males to agree that they will spend less on their next vehicle and will consider less luxurious brands.
- Respondents 45 years or older are MORE likely to agree that they are driving less since COVID restrictions were enacted, while all other COVID statements saw much higher agreement scores by respondents under the age of 45.

	Agree (Strongly or Somewhat)			Agree (Strongly or Somewhat)	
	TOTAL (N=3000)	Age: Under 45 (N=1513)	Age: 45+ (N=1487)	Male (N=1399)	Female (N=1590)
I am now driving less than I did before COVID-19 restrictions began in March 2020.	63%	59%	67%	63%	63%
COVID-19 will make me more likely to purchase a more fuel-efficient vehicle.	45%	52%	38%	44%	47%
COVID-19 has forced me to delay my next vehicle purchase.	45%	50%	40%	46%	44%
Due to COVID-19, I will consider less luxurious brands.	38%	45%	30%	36%	40%
Due to COVID-19, I will spend less on my next vehicle.	37%	42%	31%	34%	39%
COVID-19 will make me more likely to purchase a preowned vehicle.	34%	42%	26%	32%	35%
COVID-19 has made me more likely to purchase my next vehicle online, rather than in person.	33%	42%	25%	34%	32%
Due to COVID-19, I will consider fewer vehicle brands.	33%	37%	28%	32%	27%
COVID-19 will make me more likely to purchase a NEW vehicle.	29%	33%	24%	32%	27%
COVID-19 will make me more likely to purchase a fully electric vehicle (EV).	25%	32%	18%	29%	21%

COVID-19 impacts - Ethnicity / Race

As a result of COVID:

- Caucasians and Asians are MORE likely agree that they drive less.
- Caucasians are LESS likely to shop more conservatively for their next vehicle. They are less likely to buy more fuel-efficient vehicles, less likely to delay their next vehicle purchase, less likely to consider fewer or less luxurious brands, and less likely to purchase a fully electric vehicle.
- Asians are MORE likely to agree that they delayed their next vehicle purchase and that they are more likely to purchase an EV.
- African Americans are MORE likely to agree that they will purchase a new vehicle.
- Latinos are MORE likely to agree that they will spend less on their next vehicle and will consider less luxurious brands .

	Agree (Strongly or Somewhat)				
	TOTAL (N=3000)	Hispanic / Latino (N=1513)	Asian (N=1487)	African Americans (N=319)	White (N=2388)
I am now driving less than I did before COVID-19 restrictions began in March 2020.	63%	57%	63%	54%	65%
COVID-19 will make me more likely to purchase a more fuel-efficient vehicle.	45%	50%	53%	51%	44%
COVID-19 has forced me to delay my next vehicle purchase.	45%	49%	58%	49%	44%
Due to COVID-19, I will consider less luxurious brands.	38%	44%	42%	42%	37%
Due to COVID-19, I will spend less on my next vehicle.	37%	42%	34%	38%	37%
COVID-19 will make me more likely to purchase a preowned vehicle.	34%	38%	32%	39%	33%
COVID-19 has made me more likely to purchase my next vehicle online, rather than in person.	33%	41%	46%	44%	32%
Due to COVID-19, I will consider fewer vehicle brands.	33%	40%	38%	38%	31%
COVID-19 will make me more likely to purchase a NEW vehicle.	29%	35%	38%	42%	27%
COVID-19 will make me more likely to purchase a fully electric vehicle (EV).	25%	35%	39%	33%	24%

COVID-19 impacts - Income

Findings suggest COVID-19 has impacted lower income respondents more than middle income and higher income respondents:

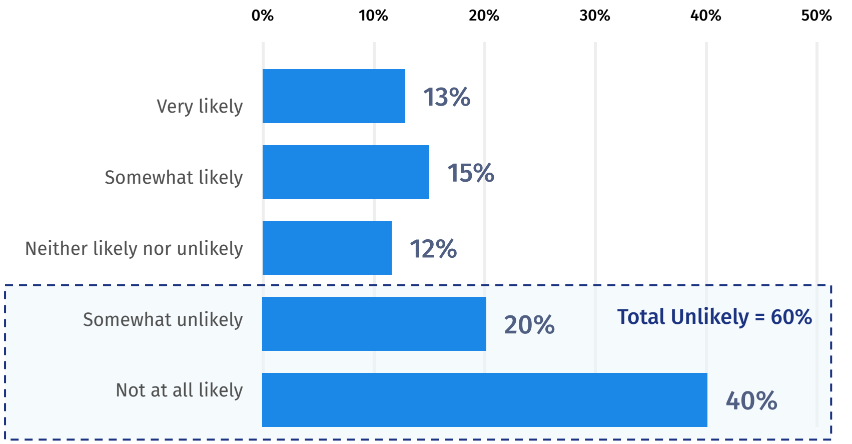
- Lower income respondents agree LESS frequently that they are driving less because of COVID and that COVID makes them more likely to purchase a new vehicle.
- Lower income respondents agree MORE frequently that COVID has made them more likely to buy a more fuel-efficient vehicle, delay their next vehicle purchase; spend less on their next vehicle, consider less luxurious brands and purchase a preowned vehicle.

	Agree (Strongly or Somewhat)			
	TOTAL (N=3000)	HHI: Under $60k/year (N=1097)	HHI: Between $60k & $100k/year (N=934)	HHI: Over $100k/year (N=969)
I am now driving less than I did before COVID-19 restrictions began in March 2020.	63%	57%	64%	68%
COVID-19 will make me more likely to purchase a more fuel-efficient vehicle.	45%	49%	43%	44%
COVID-19 has forced me to delay my next vehicle purchase.	45%	50%	45%	40%
Due to COVID-19, I will consider less luxurious brands.	38%	45%	37%	31%
Due to COVID-19, I will spend less on my next vehicle.	37%	43%	36%	31%
COVID-19 will make me more likely to purchase a preowned vehicle.	34%	42%	33%	25%
COVID-19 has made me more likely to purchase my next vehicle online, rather than in person.	33%	35%	29%	35%
Due to COVID-19, I will consider fewer vehicle brands.	33%	34%	33%	31%
COVID-19 will make me more likely to purchase a NEW vehicle.	29%	26%	28%	32%
COVID-19 will make me more likely to purchase a fully electric vehicle (EV).	25%	24%	22%	30%

Likelihood to buy online due to COVID

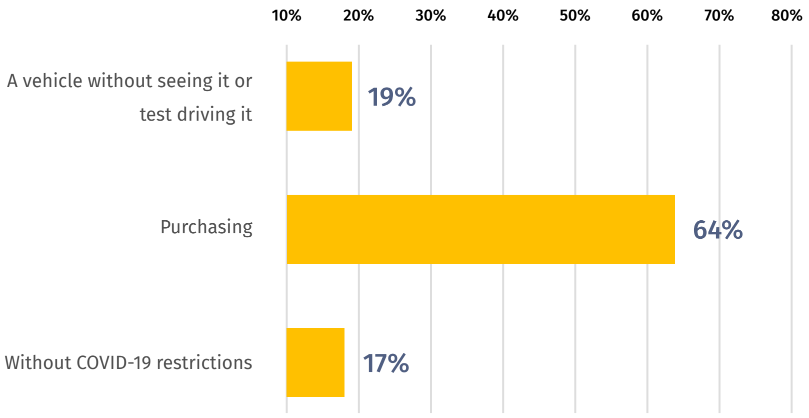
- Three-fifths (60%) were either "somewhat unlikely" or "not at all likely" to purchase online without first seeing or test driving the vehicle.
- Less than two-thirds (64%) said COVID restrictions have NOT made them more open to purchasing online without first seeing or test driving the vehicle.

How likely are you to make an online vehicle purchase without seeing or test driving the vehicle before making the purchase?



N=3000

Have COVID-19 restrictions made you more open to purchasing a vehicle online without seeing or testing driving it first? Please select ONE.

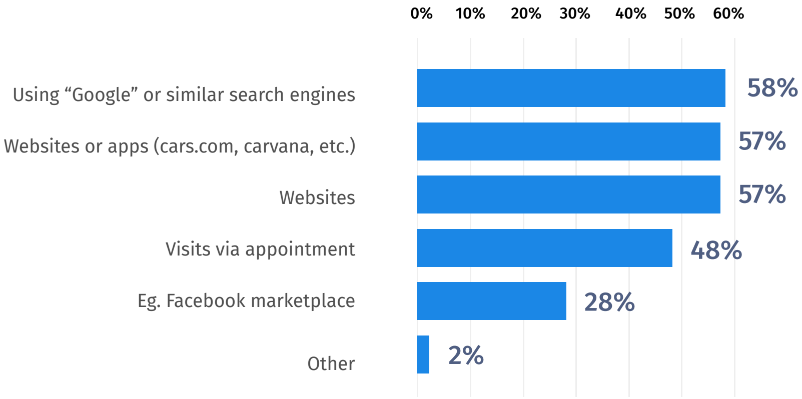


NEXT VEHICLE PURCHASE

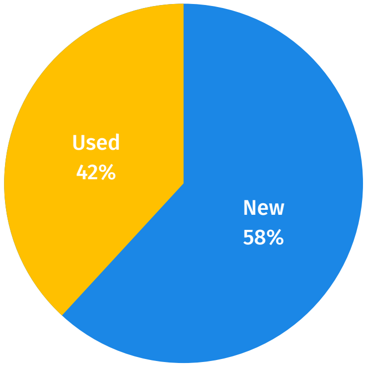
Shopping methods and buying new vs used

- About three-fifths (between 57% - 58%) plan to browse and search for their next car using online search engines like Google, car buying apps and websites, and local dealership websites.
- About three-fifths (58%) plan on buying a new vehicle (vs used).

Which of the following methods are you using to browse and shop for your next vehicle? Please select all that apply.

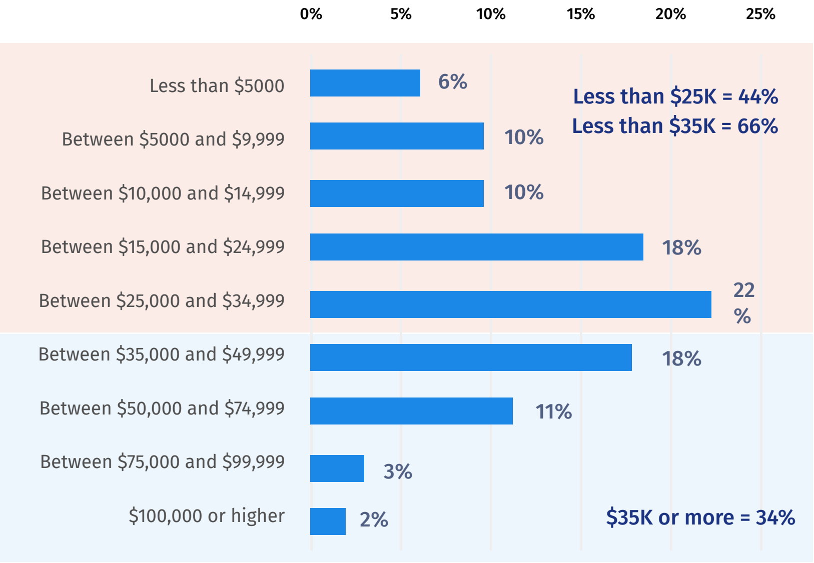


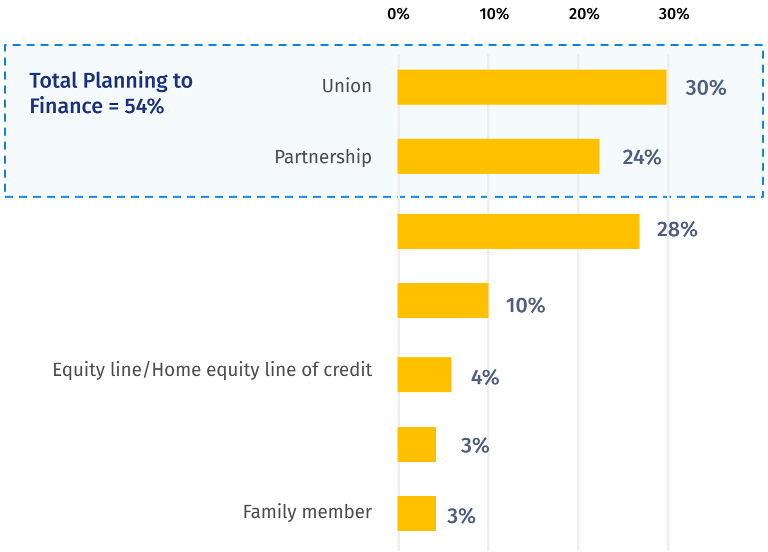
Thinking about your next vehicle purchase, will you most likely purchase a new or used vehicle? Please select one.



Next vehicle spending plans

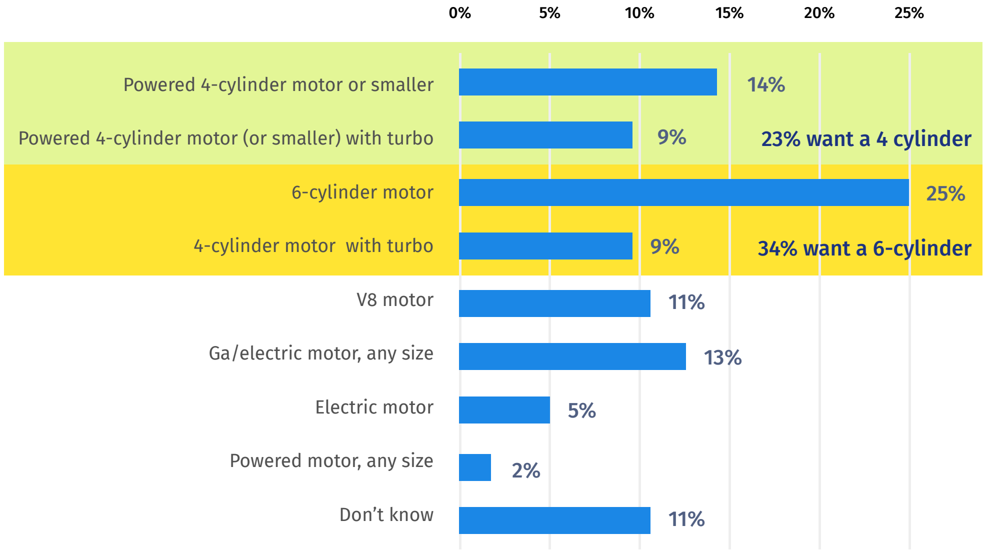
- Two-thirds plan to spend less than $35,000 and more than two-fifths (44%) will spend less than $25K on their next vehicle purchase.
- Over half (54%) with either finance their next vehicle purchase through a bank/credit union (30%) or directly through the dealership (24%).
- More than one-fourth (28%) plan to use personal savings.

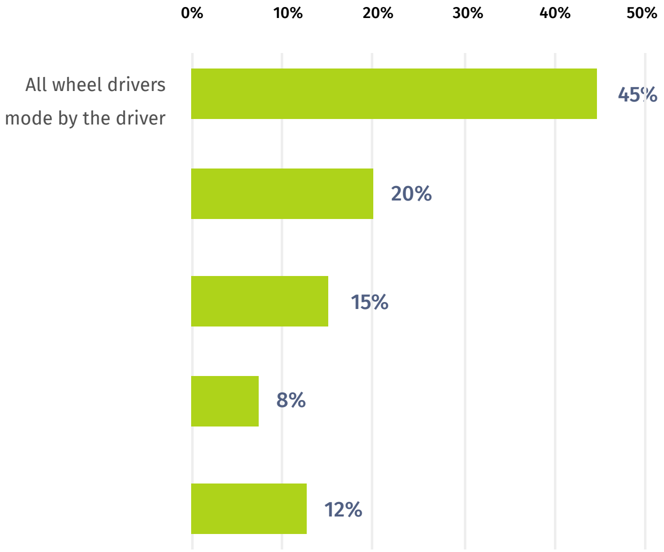




Desired motor and drivetrain

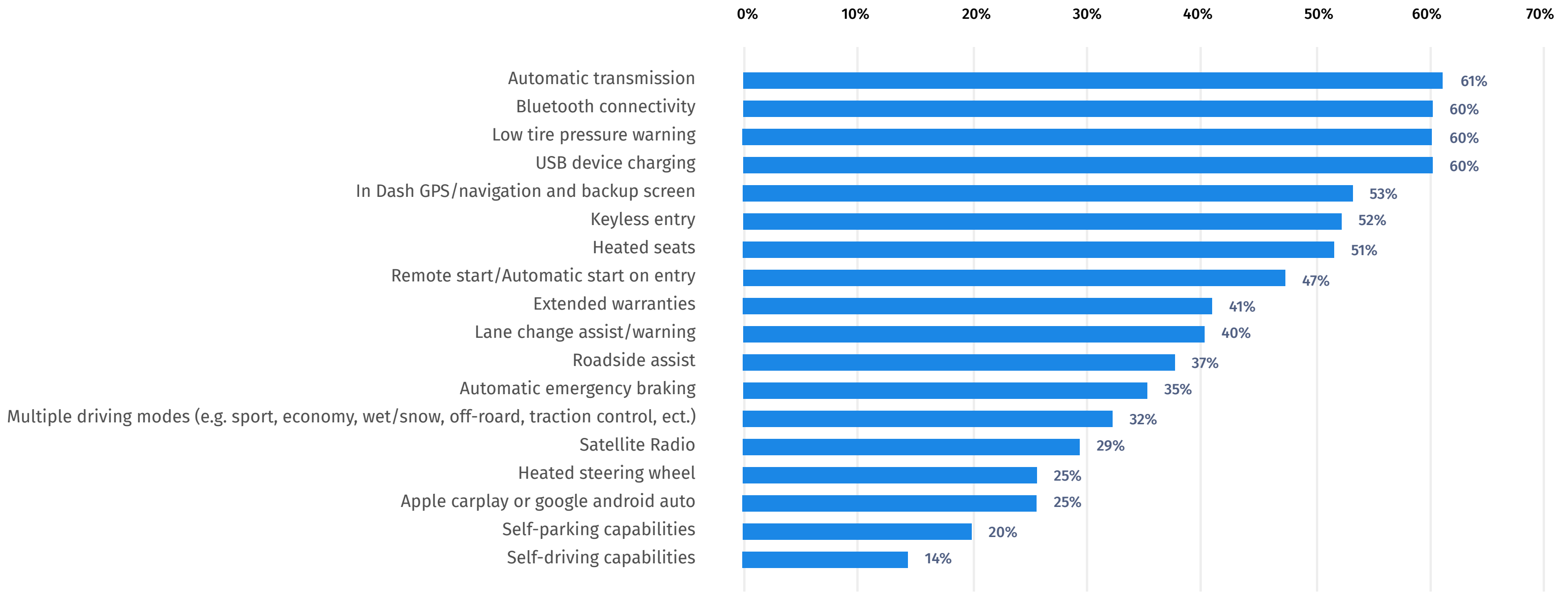
- About one-fourth (23%) would prefer a 4-cylinder motor with or without turbo, and another one-third (34%) would prefer a 6-cylinder motor with or without turbo.
- Less than half (45%) want all-time, all wheel drive (AWD) and another one-fifth want front wheel drive.





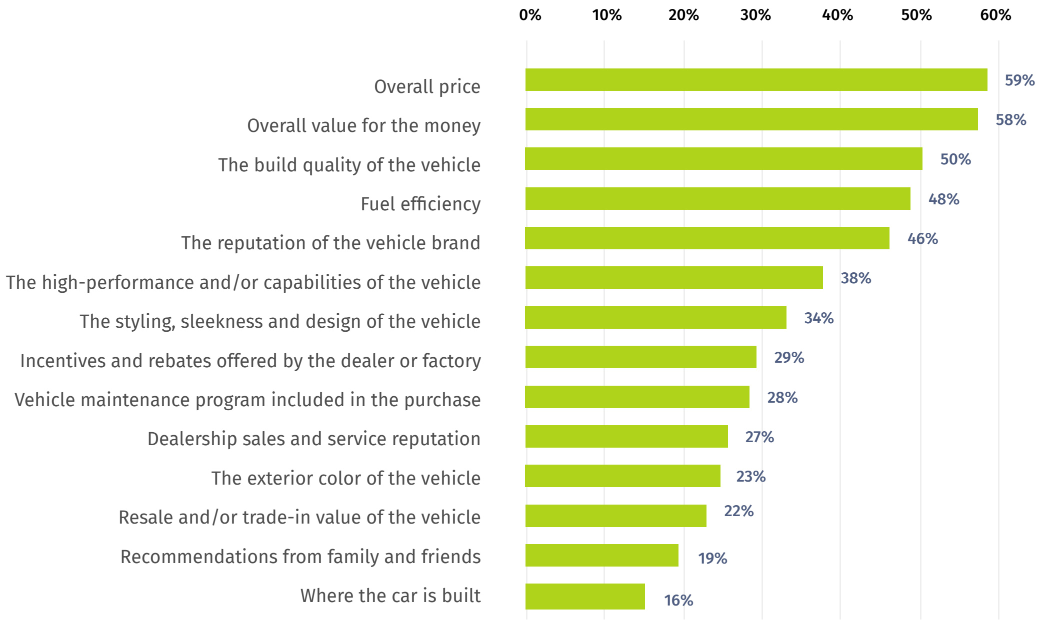
Must have features in next vehicle

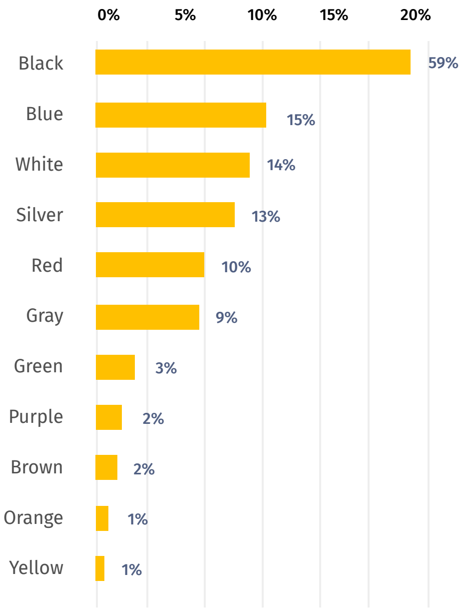
- Three-fifths selected automatic transmission (61%), Bluetooth connectivity (60%), low tire pressure warning (60%), and USB device charging (60%) as "MUST HAVE" features.
- Over half selected In-Dash GPS/navigation with backup screen (53%), keyless entry (52%), and heated seats (51%), as "MUST HAVE" features.



Purchase influencers and preferred exterior color

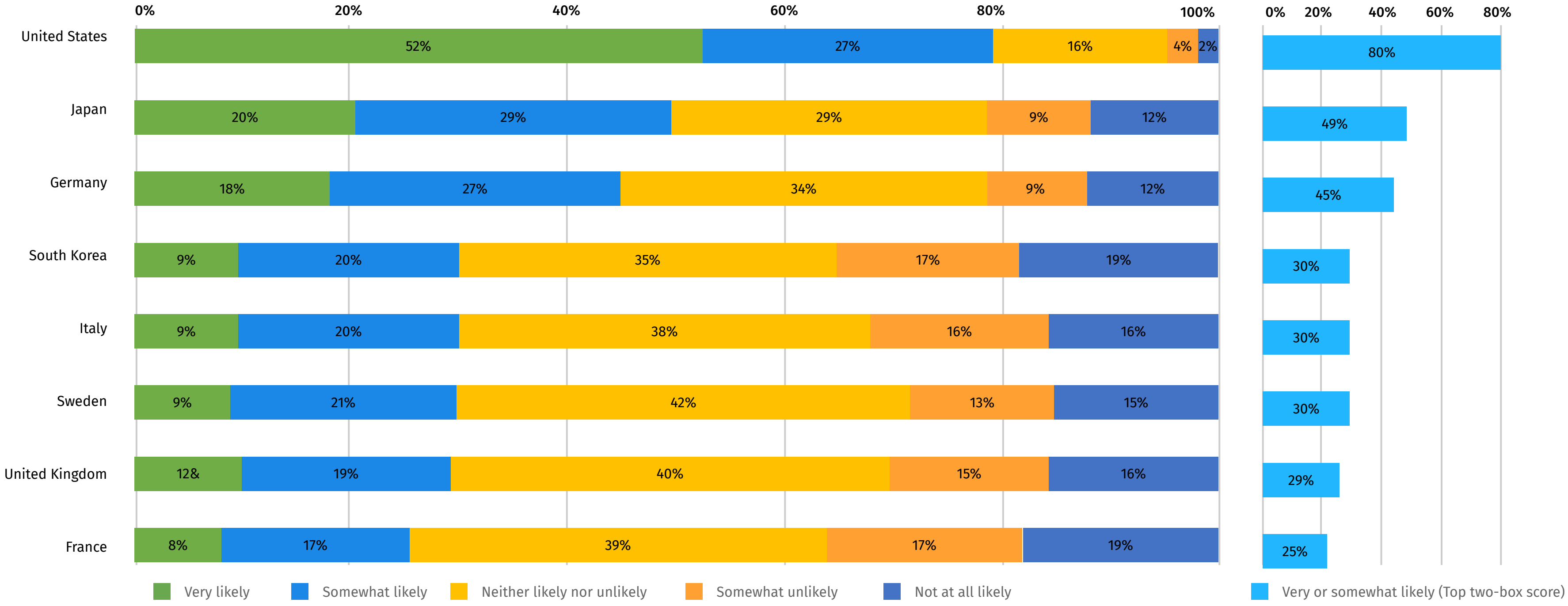
- Respondents believe the most important influential factors on their next vehicle purchase will be "overall price" (59%), "overall value for the money" (58%), "the build quality of the vehicle" (50%) and "fuel efficiency" (48%).
- Over one-fourth (29%) want the exterior color of their next vehicle to be black.





Likelihood to purchase by country of build

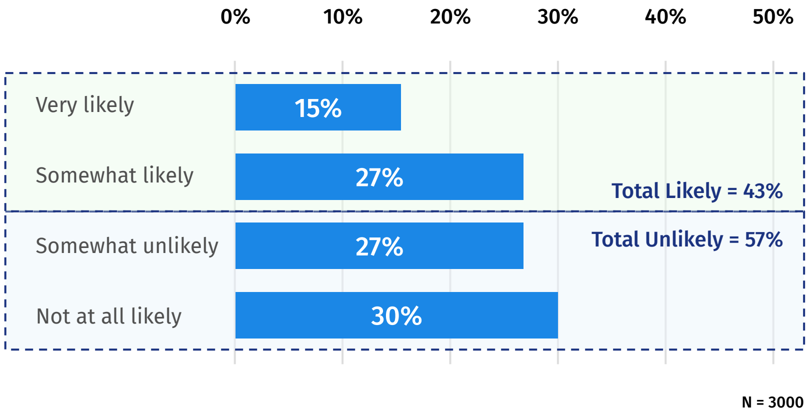
- The likelihood of purchasing a vehicle built in the US is much higher than any other country.
- Excluding the US, vehicles built in Japan and Germany have the highest likelihood of purchase.



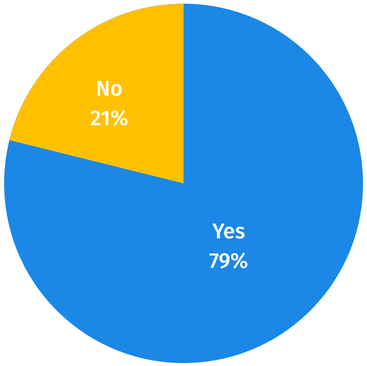
Electric vehicle purchase consideration

- Less than three-fifths (57%) indicated that they were either somewhat unlikely or not at all likely to pay for a fully electric vehicle.
- For those who were either “very’ or “somewhat” likely to purchase a fully electric vehicle, a majority (79%) said they are willing to pay more for an electric vehicle having the same features, functions and amenities as a gasoline powered vehicle.

How likely would you be to pay for a fully electric vehicle?

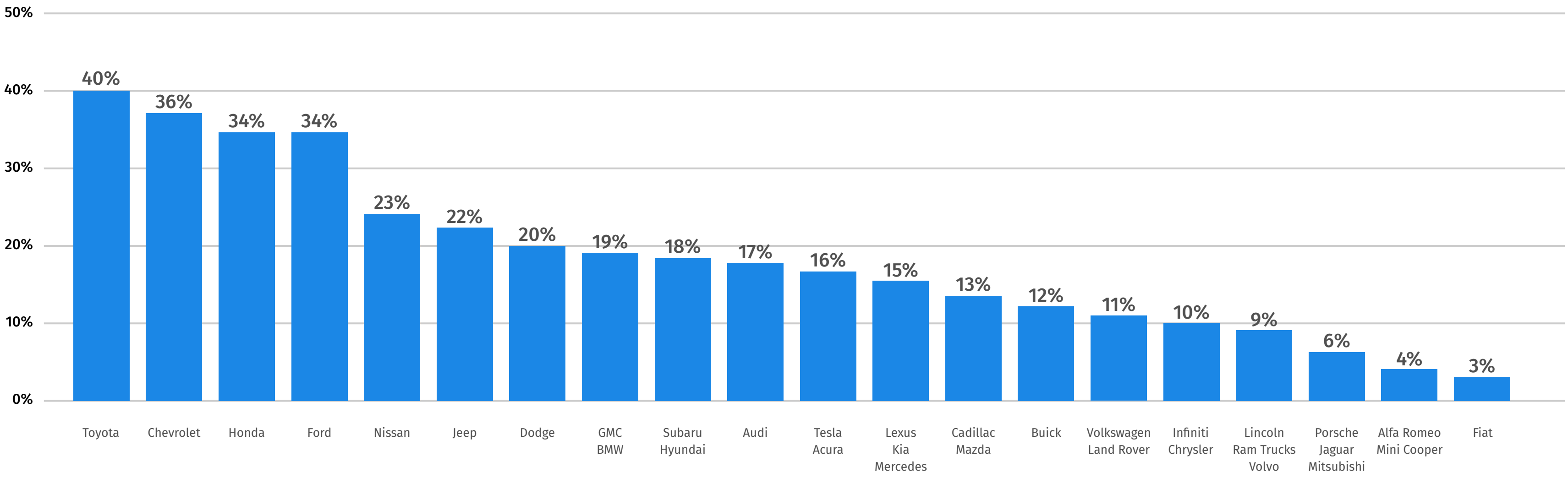


Are you willing to pay more for an electric vehicle if it had the same functionality, features and amenities as a gasoline vehicle?



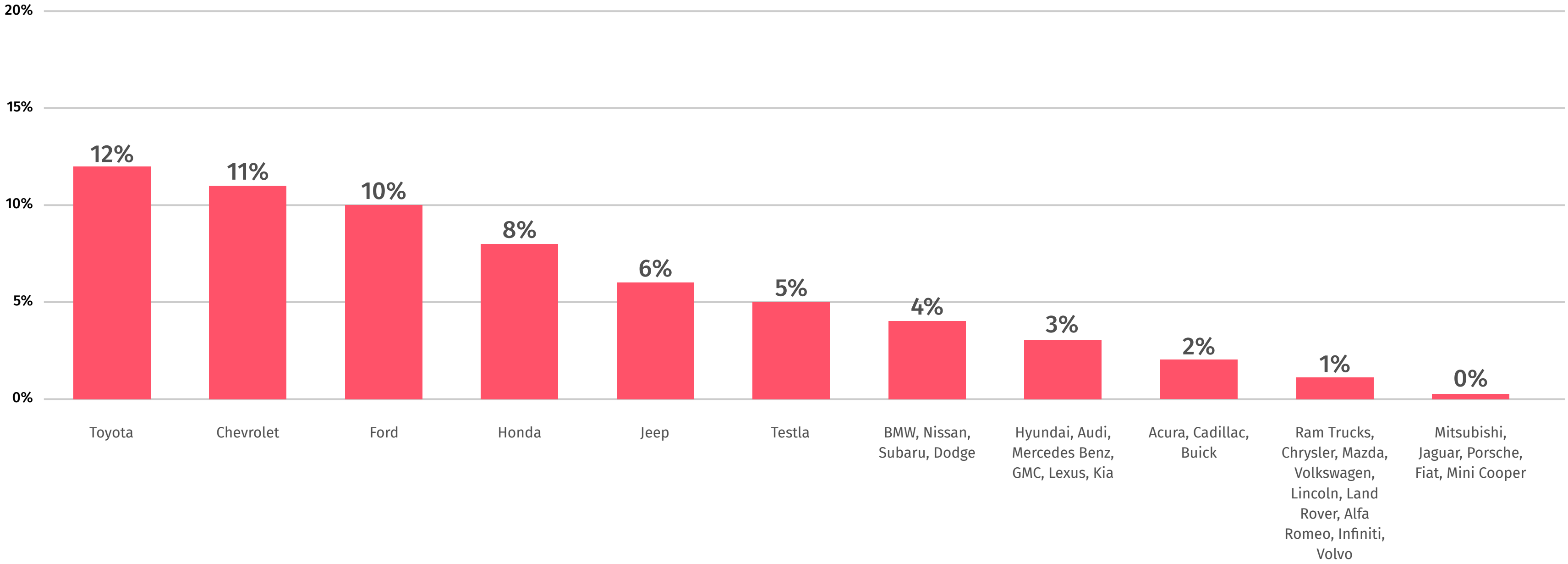
All brands under purchase consideration

Toyota, Chevrolet, Honda and Ford ranked highest for brands they will consider purchasing as their next vehicle.



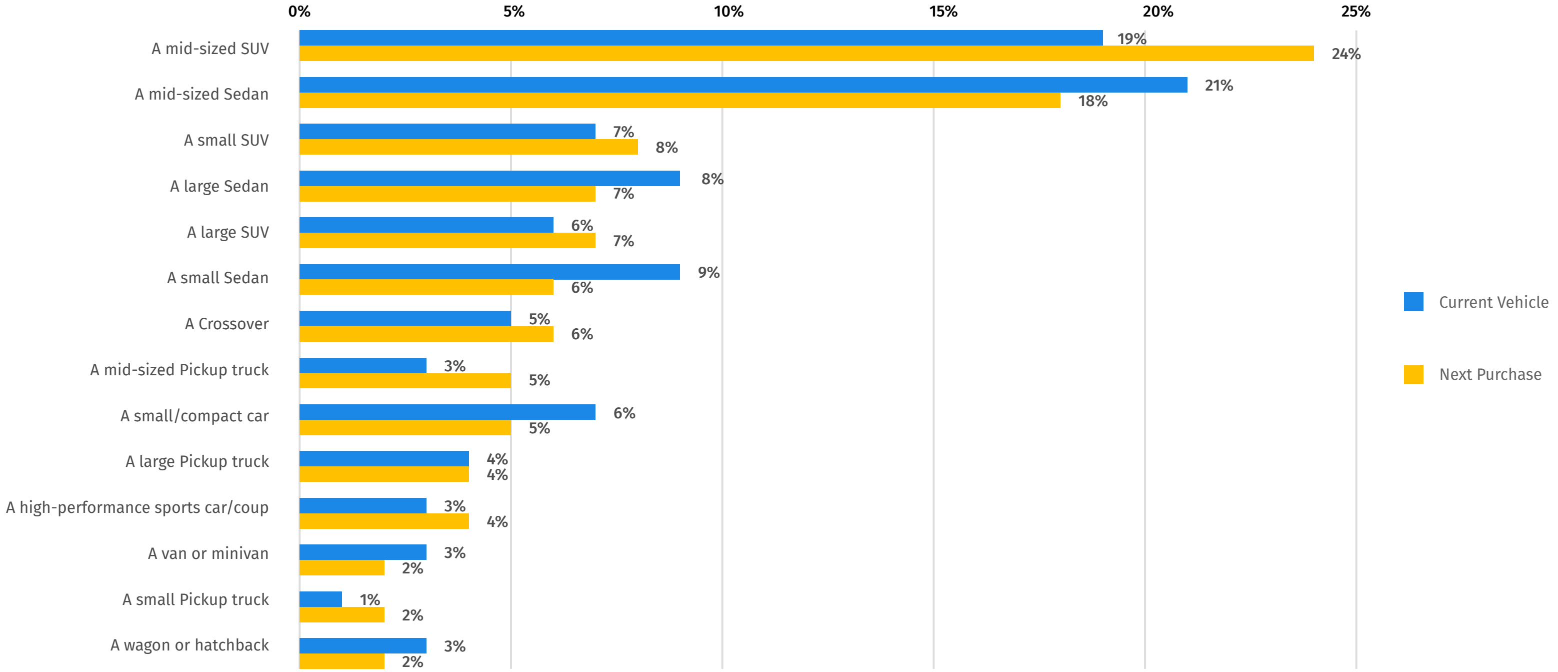
The ONE brand they will most likely purchase…

Toyota, Chevrolet, Ford, Honda and Jeep ranked highest for the ONE brand they will most likely purchase next.



Current vs next vehicle type

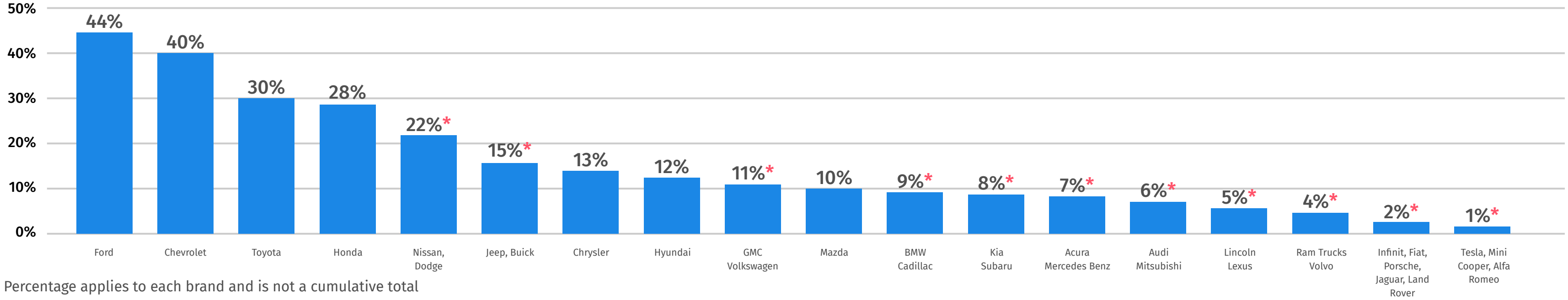
- About one fifth (19%) currently own mid-sized SUVs, and about one-fourth (24%) want a mid-sized SUV as their next vehicle.
- About one-fifth (21%) currently own mid-sized sedans, and less than one-fifth (18%) want a mid-sized sedan as their next vehicle.



PAST & CURRENT VEHICLE OWNERSHIP

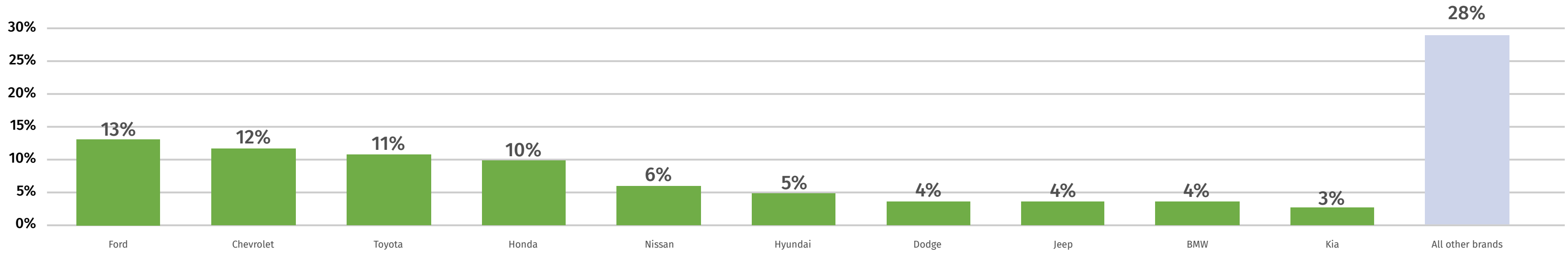
Past and current vehicle brand ownership

Ford, Chevrolet, Toyota and Honda ranked highest for current or past ownership



* Percentage applies to each brand and is not a cumulative total

72% of respondents (2148 of 3000) own and mostly drive one of the 10 brands below.



Current vehicle usage and age

Personal vs Business Use:

- Kia and Hyundai owners use their vehicles solely for personal use more than any other brand.
- BMW owners use their vehicles more for business use than any other brand. They are also used more than any other brand for both personal and business use.

Age of Current Vehicle:

- BMW owners currently drive the newest vehicles in the “less than 3-year” and the “between 3 – 5 years old” categories, followed closely by Jeep in both categories and Hyundai in the “between 3 – 5 years old” category.
- Ford owners currently drive the oldest vehicles in the “over 10 years old” category, followed closely by Toyota, Chevrolet and Dodge.

	Ford (N=384)	Chevrolet (N=354)	Toyota (N=331)	Honda (N=303)	Nissan (N=166)	Hyundai (N=137)	Dodge (N=135)	Jeep (N=135)	BMW (N=112)	Kia (N=92)
Personal use only	63%	62%	65%	65%	64%	**71%**	63%	67%	40%	72%
Business use only	4%	8%	6%	3%	5%	1%	10%	5%	**19%**	3%
Both personal & Business	33%	30%	29%	32%	31%	28%	27%	28%	**41%**	25%
Less than 3 years old	17%	23%	18%	19%	16%	24%	19%	31%	**35%**	21%
Between 3-5 years old	26%	24%	29%	26%	26%	31%	26%	31%	**35%**	28%
Between 6-10 years old	27%	25%	24%	25%	36%	27%	28%	19%	22%	**38%**
Over 10 years old	**30%**	27%	28%	18%	22%	18%	27%	19%	8%	13%

Current vehicle top-two-box satisfaction scores (Excellent/Good)

- For the 10 most currently owned vehicle brands, Toyota received the highest satisfaction ratings for overall satisfaction (followed closely by Hyundai, BMW, and Kia), ease of maintenance (followed closely by Kia), and cost of maintenance (followed closely by Hyundai).
- Hyundai received the highest satisfaction ratings for overall reliability (followed closely by Toyota), overall fuel economy (followed closely by Kia and Honda), and for driver comfort (followed closely by BMW and Toyota).
- BMW received the highest satisfaction ratings for passenger comfort, available safety features, available options/creature comforts and performance/capabilities.

	Ford (N=384)	Chevrolet (N=354)	Toyota (N=331)	Honda (N=303)	Nissan (N=166)	Hyundai (N=137)	Dodge (N=135)	Jeep (N=135)	BMW (N-112)	Kia (N=92)
Overall Reliability	80%	87%	94%	91%	90%	**96%**	82%	89%	89%	90%
Ease of maintenance	74%	77%	**87%**	84%	81%	83%	80%	81%	72%	86%
Cost of maintenance	80%	70%	**83%**	80%	73%	81%	66%	78%	66%	78%
Fuel costs/fuel economy	66%	68%	81%	83%	77%	**85%**	57%	59%	72%	84%
Level of driver comfort	80%	84%	87%	85%	85%	**88%**	78%	86%	87%	85%
Level of passenger comfort	77%	78%	80%	83%	81%	86%	76%	78%	**88%**	86%
Available safety features	72%	71%	79%	78%	78%	83%	72%	79%	**85%**	78%
Available options and creature comforts	66%	71%	78%	73%	72%	80%	65%	76%	**86%**	73%
The high-performance and/or capabilities of the vehicle	65%	72%	74%	75%	72%	73%	68%	76%	**86%**	72%
The exterior design and styling of the vehicle	77%	81%	80%	78%	81%	82%	76%	**90%**	83%	80%
Overall satisfaction	82%	87%	**92%**	89%	87%	91%	81%	88%	90%	90%

Current vehicle brand loyalty and Net Promoter Score

- Toyota owners are more likely to replace their current vehicle with another Toyota.
- Kia had the highest Net Promotor Score.

	Ford (N=384)	**Chevrolet** (N=354)	**Toyota** (N=331)	**Honda** (N=303)	**Nissan** (N=166)	**Hyundai** (N=137)	**Dodge** (N=135)	**Jeep** (N=135)	**BMW** (N-112)	**Kia** (N=92)
Likelihood to Replace Current Brand w/same Brand (Very/Somewhat)	73%	78%	**82%**	79%	67%	78%	71%	74%	71%	70%

	Ford (N=384)	**Chevrolet** (N=354)	**Toyota** (N=331)	**Honda** (N=303)	**Nissan** (N=166)	**Hyundai** (N=137)	**Dodge** (N=135)	**Jeep** (N=135)	**BMW** (N-112)	**Kia** (N=92)
Net Promoter Score (NPS)	16%	27%	43%	41%	21%	30%	10%	38%	45%	**49%**

Thanks for reading.

If you want to learn more about QuestionPro or Eyes4Research, and how we are pushing the automobile industry forward, contact us with the info below.

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