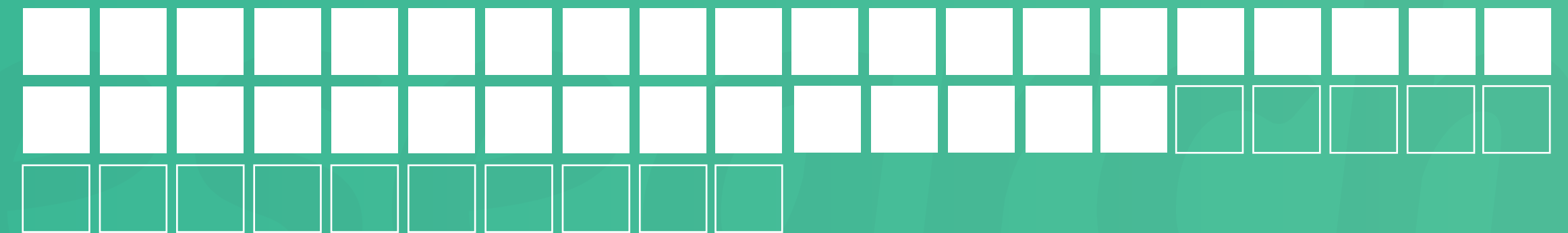


U.S. AUTOMOBILE CONSUMER STUDY

AUTOMOBILE BRAND OVERALL AWARENESS



Overall awareness was **70%** for 25 of the 33 brands



The highest overall brand awareness

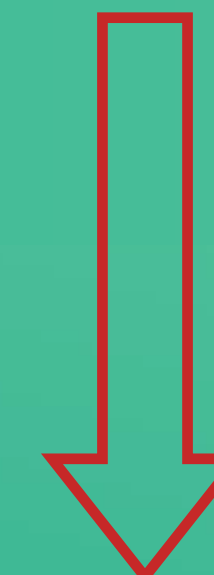
79%-76%

Ford, Chevrolet, Honda, Toyota and BMW



Lowest brand awareness

Alfa Romeo, Fiat, Ram Trucks and Mini Cooper



QUALITY PERCEPTIONS – “HIGH” QUALITY BRANDS



Perceived

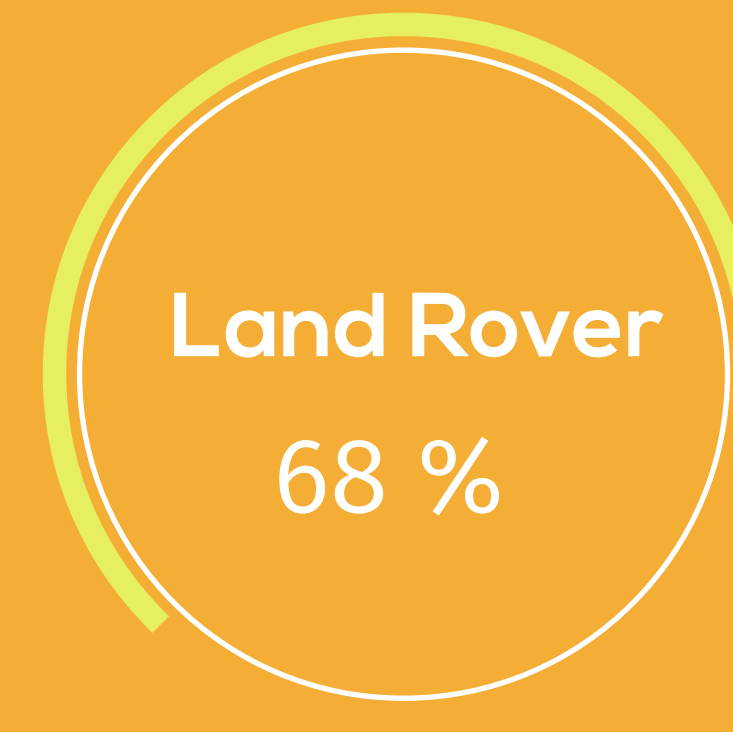
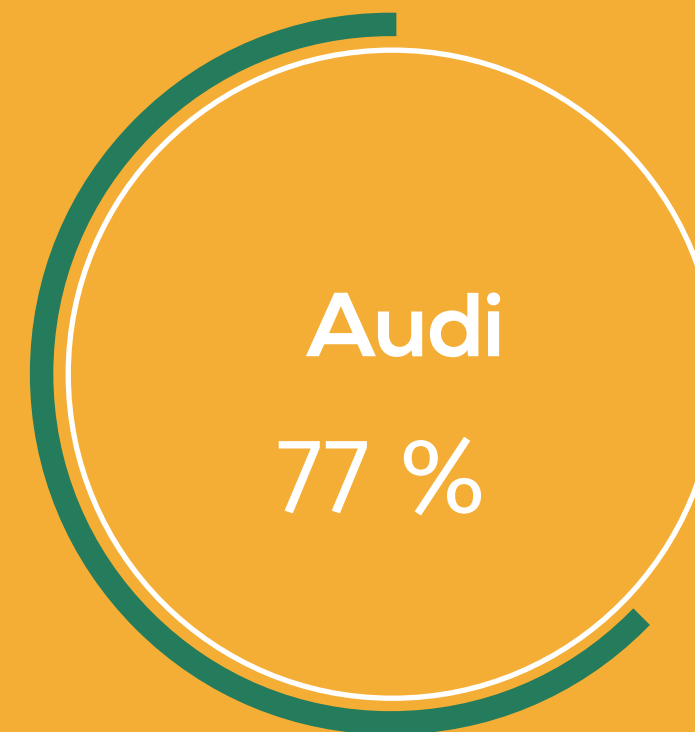
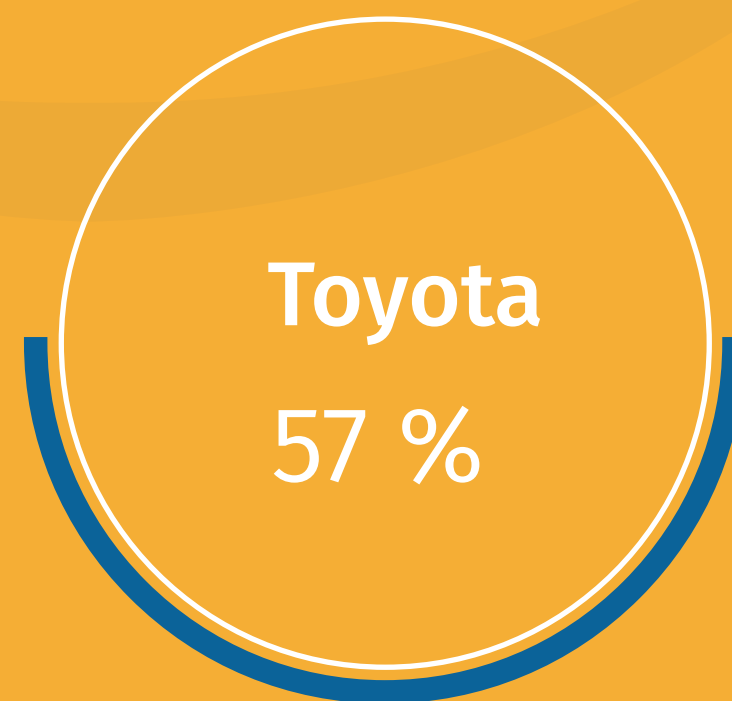
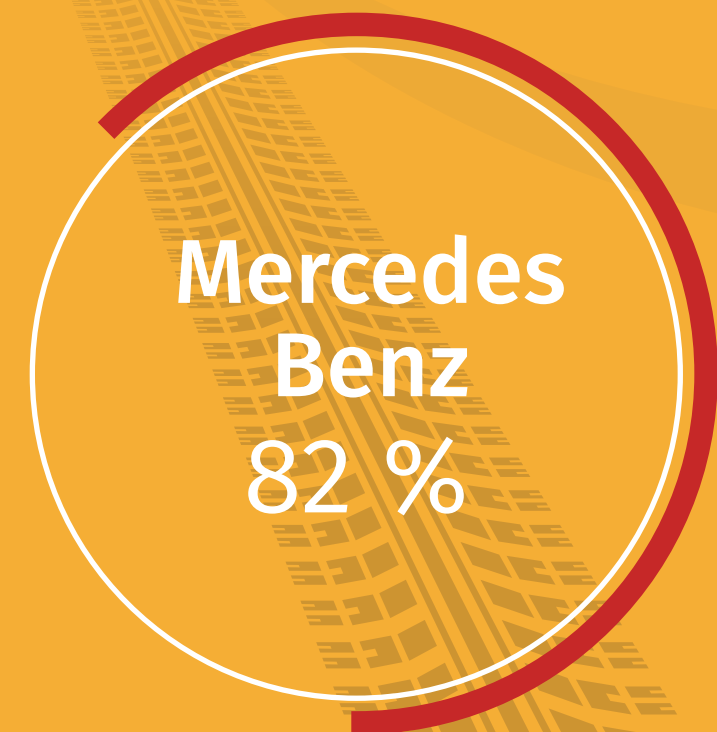


brands receiving
the highest quality scores

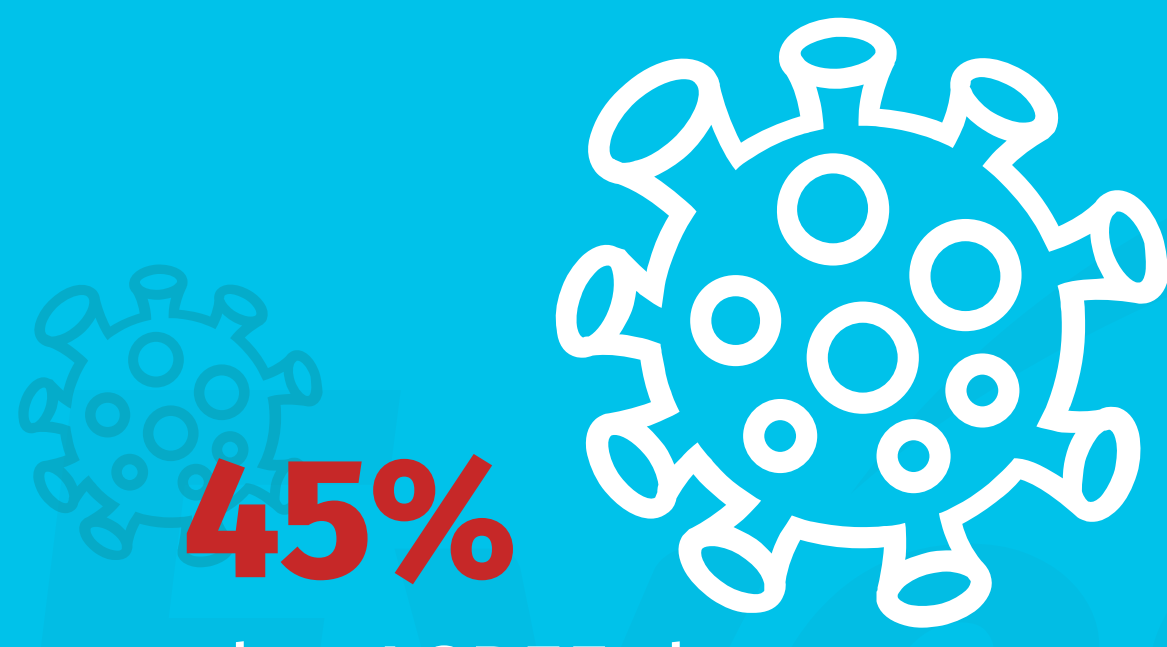
Mercedes Benz, BMW,
Lexus, Porsche and Audi

High-end performance  LUXURY BRANDS

Highest overall
quality



HOW COVID IMPACTS THEIR NEXT VEHICLE PURCHASE:



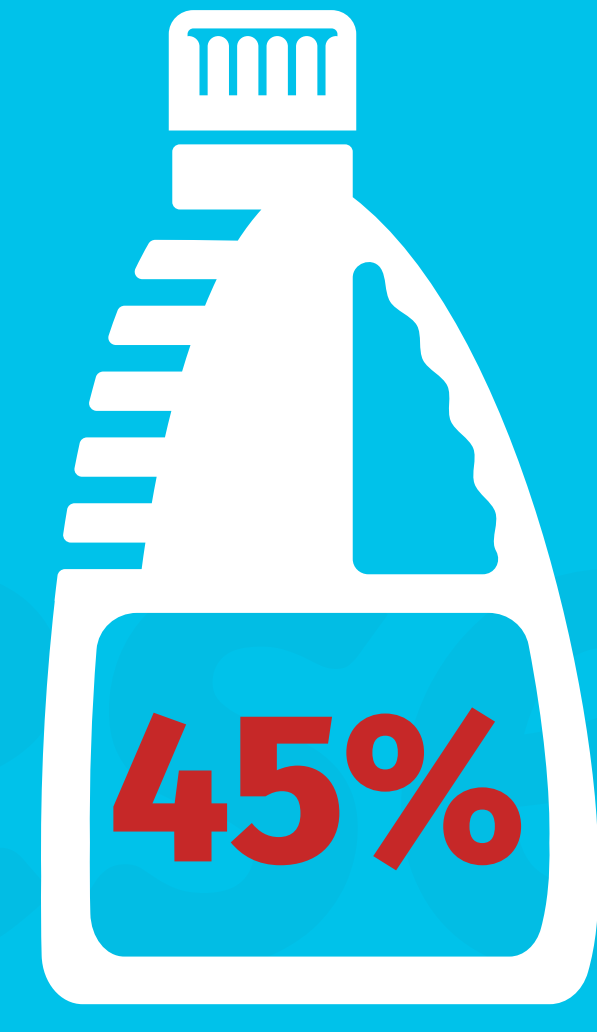
45%

also AGREE that COVID-19 has forced them to delay their next vehicle purchase



38%

AGREE that they will spend less on their next vehicle because of COVID



45%

AGREE that COVID will make them more likely to purchase a **MORE FUEL-EFFICIENT VEHICLE**



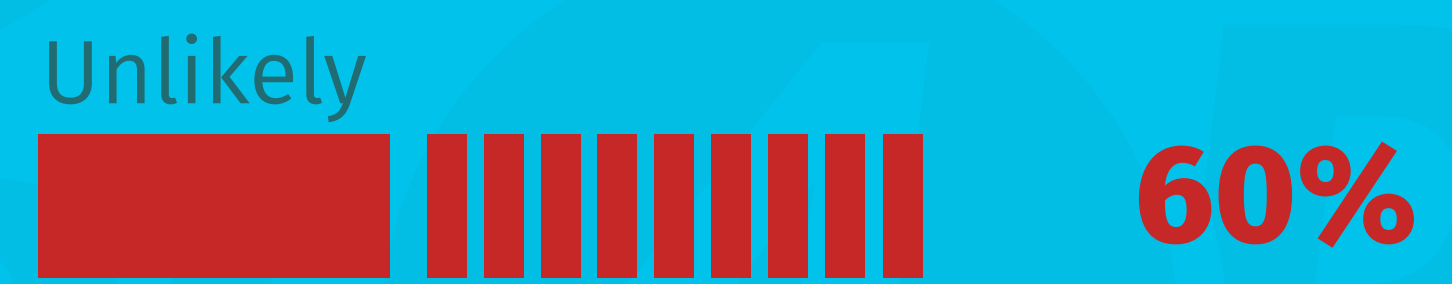
60%

AGREE (strongly or somewhat) that they are driving less since COVID restrictions began

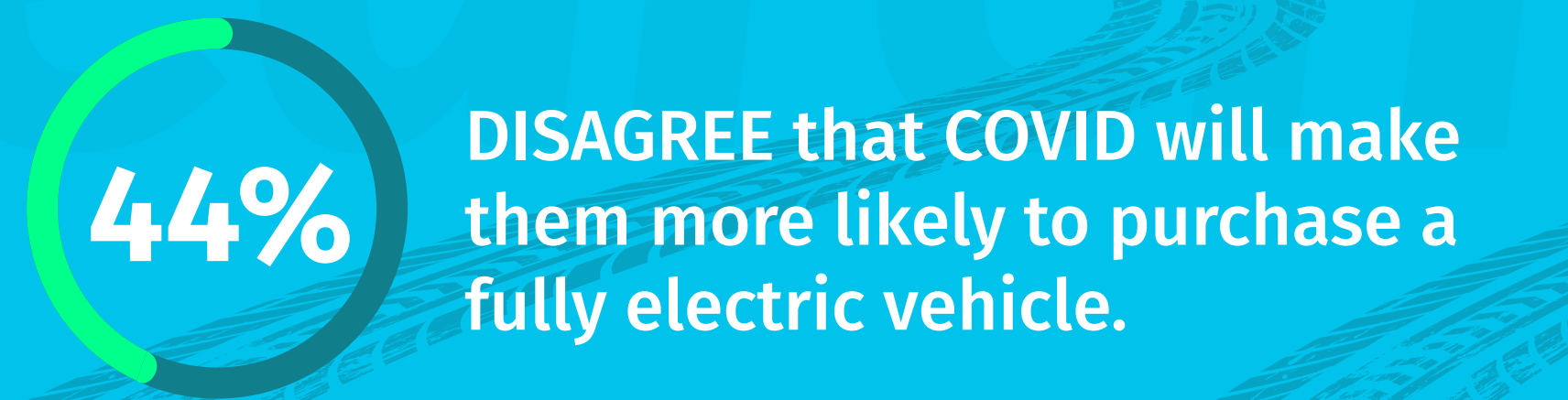
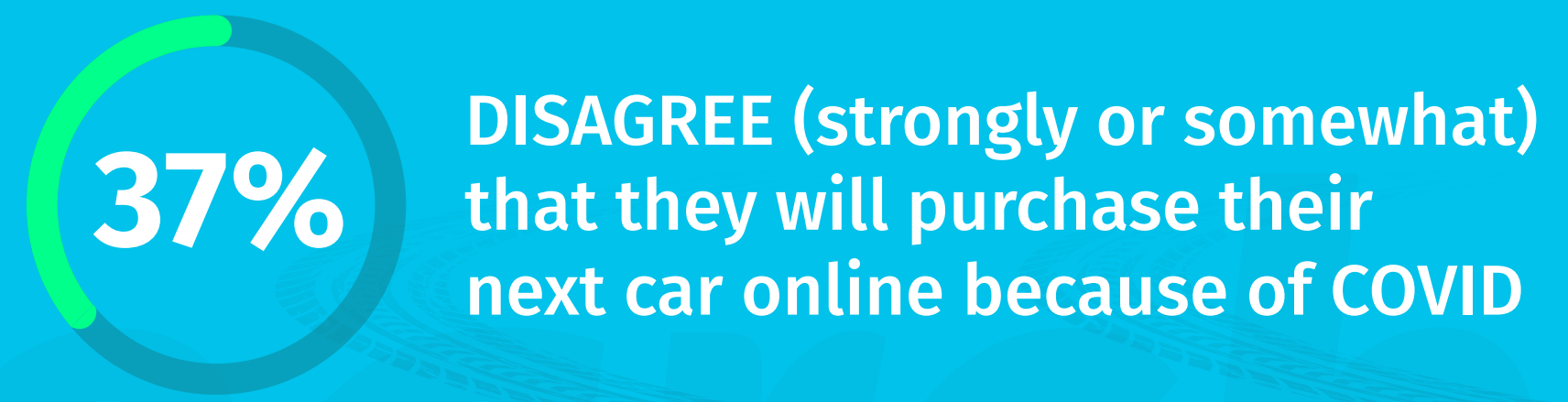
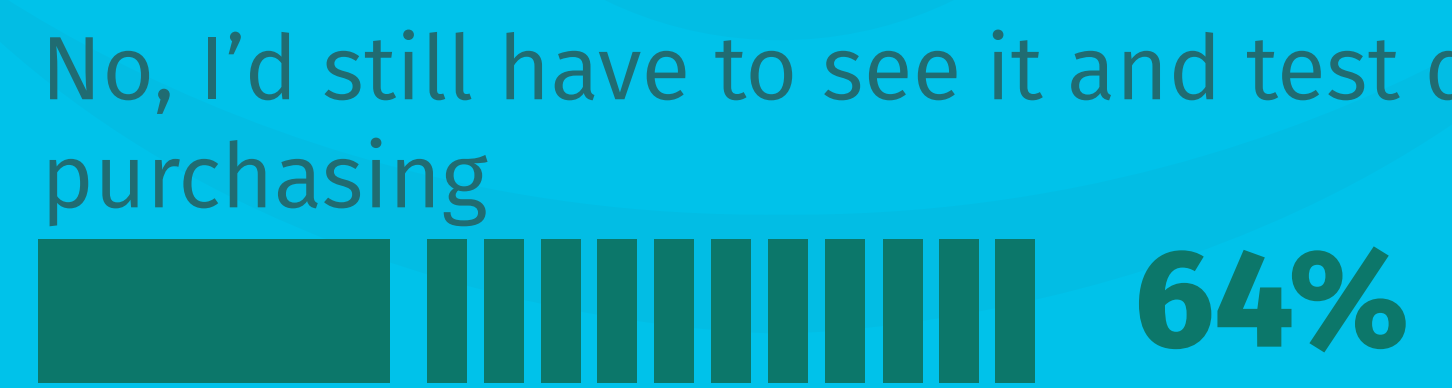
LIKELIHOOD TO BUY ONLINE DUE TO COVID



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

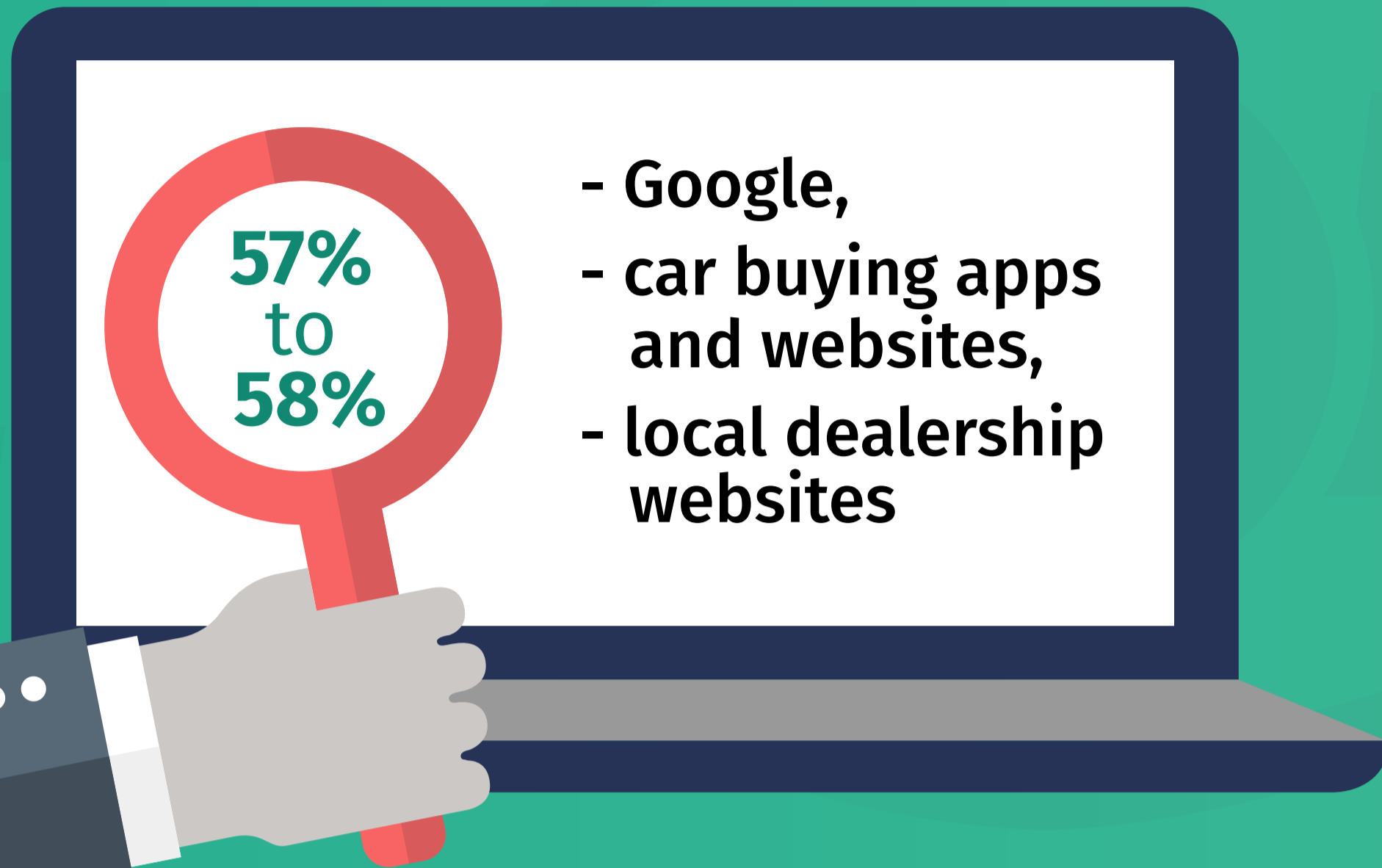


Have COVID-19 restrictions made you more open to purchasing a vehicle online without seeing or testing driving it first? Please select ONE.



LIKELIHOOD TO BUY ONLINE DUE TO COVID

Plan to browse and search for their next car using online search engines like



58%

plan on buying a new vehicle (vs used)

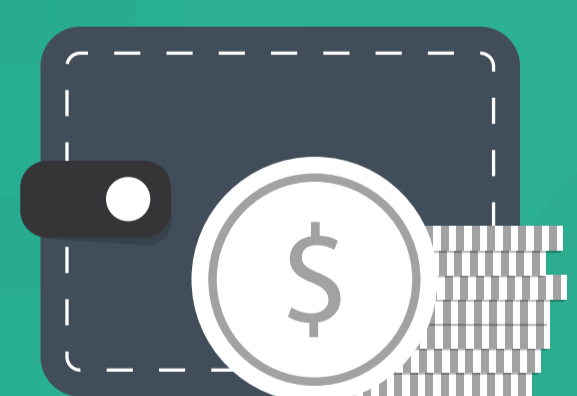
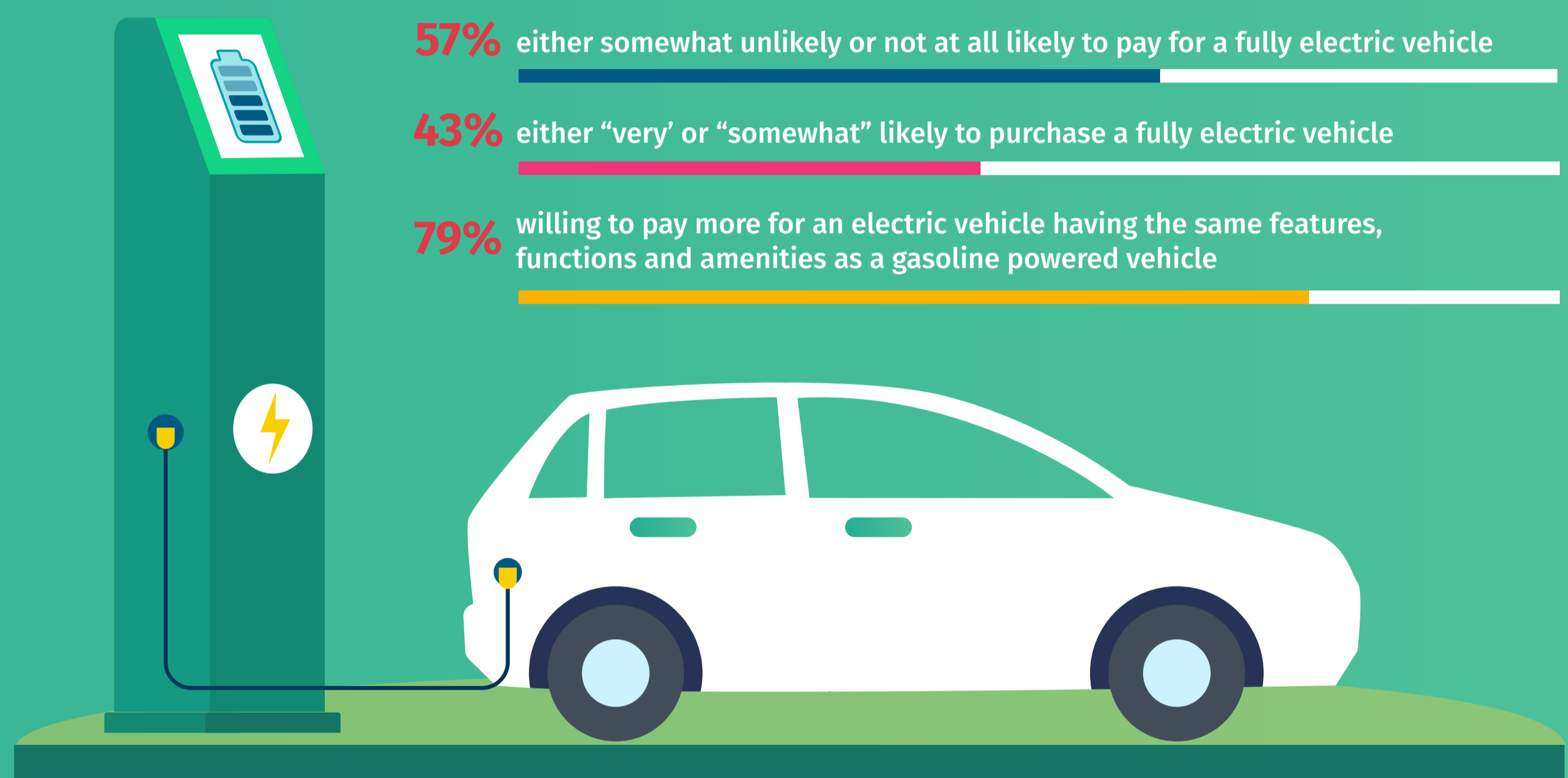
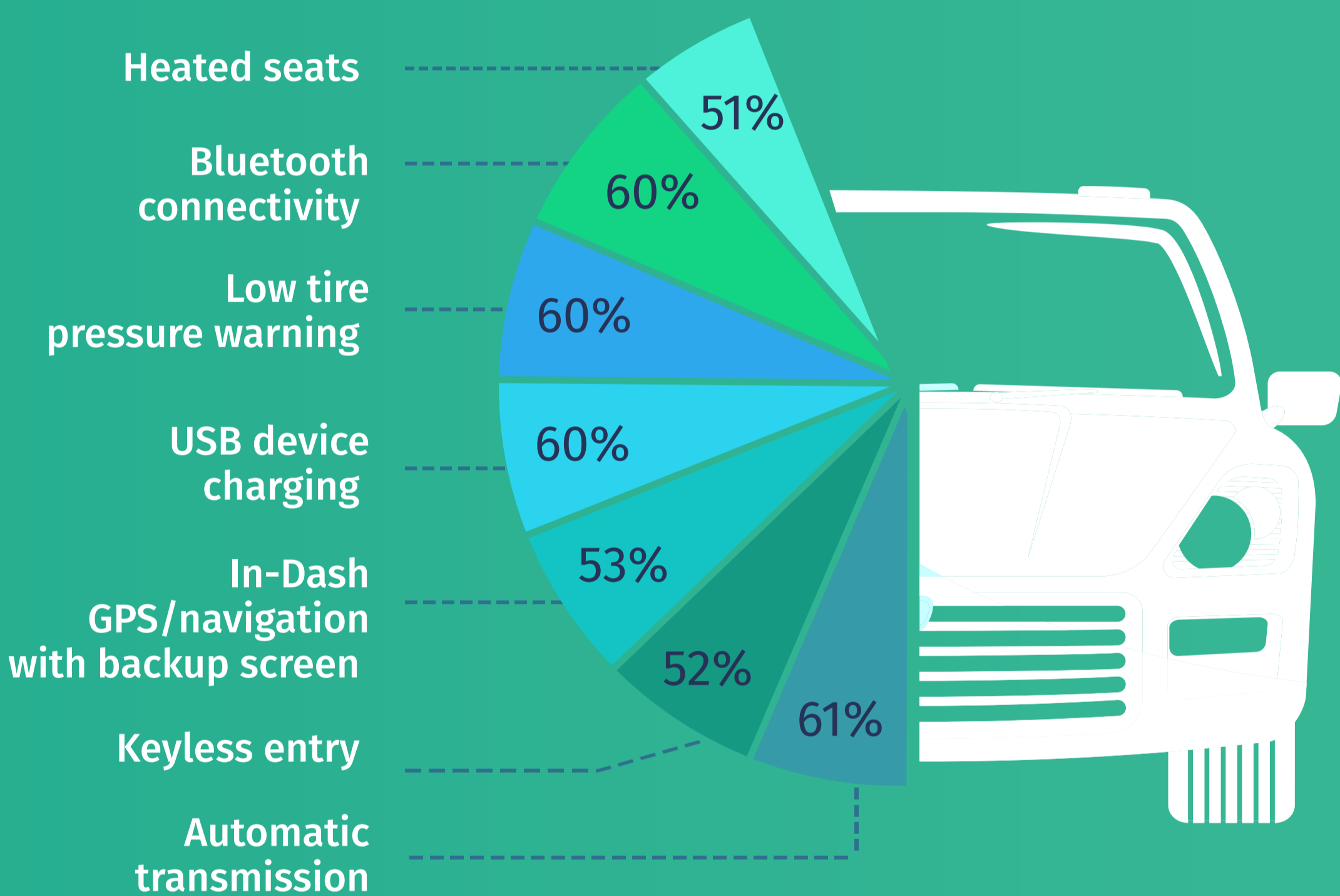
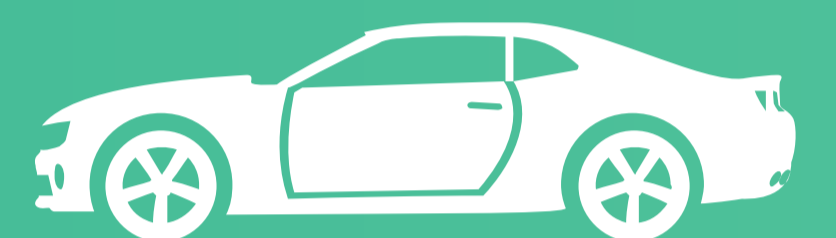


24%

want a mid-sized SUV

18%

want a mid-sized sedan as their next vehicle



Two-thirds plan to spend less than \$35,000 and more than two-fifths

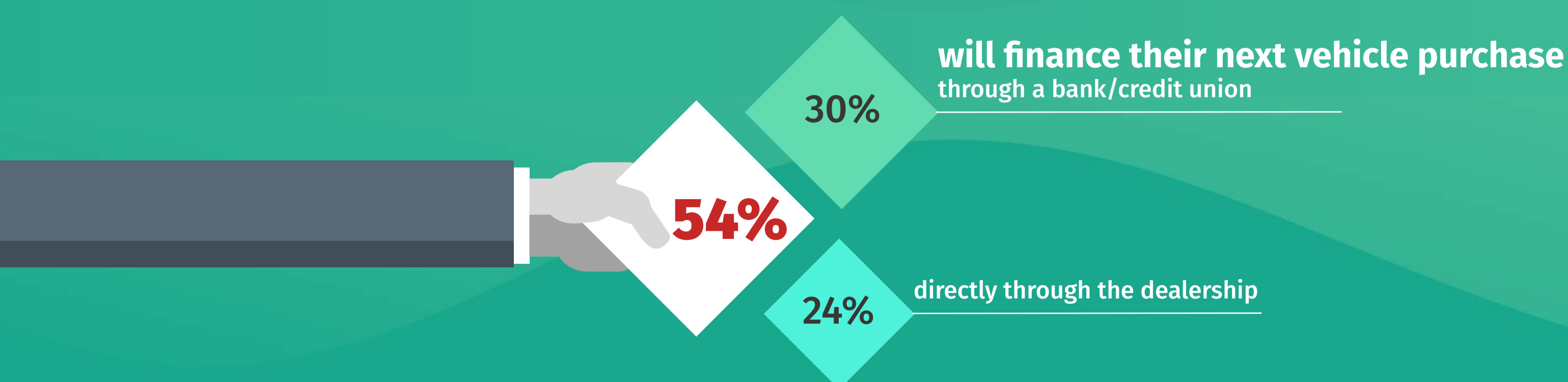
44%

will spend less than \$25K on their next vehicle purchase.



28%

Plan to use **PERSONAL SAVINGS**



CURRENT VEHICLE BRAND LOYALTY AND NET PROMOTOR SCORE



Toyota owners are more likely to
replace their current vehicle
with another Toyota.



KIA HAD THE HIGHEST NET PROMOTOR SCORE