



Final Report

Auto Brand Perceptions 2012: National Consumer Assessment

Appendix: Questionnaire

**For Public
Release**

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Methodology

- Telephone surveys were conducted among 2,045 random adults comprising 1,031 men and 1,014 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 1,702 adults who said that their household owns a vehicle. Interviewing took place over December 1-5, 2011.
- 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 2007-2010.
 - ✓ Because of methodology differences, the results for GMC trucks are not comparable to the December 2007-2008 studies.
 - ✓ Four new brands were included in the study this year: Ferrari, Fiat, Fiskar, Tesla.
- 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 a nationally representative probability sample of telephone households. 1,702 interviews were completed among adults aged 18+ whose household owns at least one vehicle. Interviewing took place over December 1-5, 2011. 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
 - ⇒ Environmentally friendly/green
 - ⇒ Performance
 - ⇒ Quality
 - ⇒ Safety
 - ⇒ Technology/innovation
 - ⇒ Value
 - ✓ Mentioned as the car driven most frequently (unaided).
- **Total 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, 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 2011 continued its recovery as the overall economy stabilized and resumed modest growth. In the auto space, the relative calm of 2011 followed several years of turmoil, punctuated by the bankruptcy of General Motors and Chrysler, and the flurry of recalls suffered by Toyota.
- For the full calendar year, light vehicle sales totaled 12.8 million units, up 10% from 11.6 million units sold during January-December 2010. But sales performance varied considerably among leading automakers. Considering companies with 2011 sales of at least 250,000 units, Kia (+36%) and Chrysler (+26%) posted the biggest gains, while Honda and Toyota (both down 7%) performed the worst. General Motors and Ford, number one and two in terms of 2011 sales, grew by 13% and 11%, respectively.
- Alongside the sales results, this latest edition of the Consumer Reports auto brand perception poll indicates that the differences perceived among brands diminished. As a result, the overall perception of leading brands declined, while many of the smaller brands benefited. In addition, the study shows that loyalty among the top four brands has converged. Taken together, we conclude that the automotive marketplace is becoming more competitive, with smaller differences of perceived quality across brands. As a result, the consideration set that consumers operate with when shopping for a new car has grown.
- For 2011, the leader's board of overall brand perceptions was topped by the same four brands in the same rank order as the year before, but absolute scores declined. Beginning with number one, the Total Score and change from 2010 were: Toyota (130.6, -17 percentage points), Ford (121.1, -23 pp), Honda (93.8, -27 pp) and Chevrolet (92.2, -10 pp). Considering the top ten brands in 2010, nine survived into 2011 and all posted a lower Total Score; newcomer Tesla displaced Subaru, number ten in 2010. (pages 18-19)



Implications (cont.)

- In the 2011 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 varied widely across the seven dimensions, and none of them registered a meaningful change versus December 2010. In this study, the leading factors were mentioned by about half or more of respondents: *safety, quality, value and performance*. (page 14)
 - ✓ Safety (65%)
 - ✓ Quality (57%)
 - ✓ Value (51%)
 - ✓ Performance (49%)
 - ✓ Environmentally friendly or green (29%)
 - ✓ Design or style (24%)
 - ✓ Technology or innovation (18%)
- 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.



Implications (cont.)

- Overall leadership in the seven factors (pages 20-27)
 - ✓ The ranks of the top ten brands overall changed little from last year. Toyota, Ford, Honda and Chevrolet remained at Nos. 1-4, fifth-place Mercedes-Benz swapped places with BMW, Volvo stayed at number seven, and Cadillac seized eighth place from Lexus. Tesla, new to the study in 2011, supplanted Subaru at the number ten slot.
 - ✓ Although scores fell among all nine brands that persisted on the top ten list, Ford and Honda suffered relatively more than Toyota. Consequently, in 2011 Toyota's advantage over Ford widened to 9 points (from 4 points in 2010), and to 37 points over Honda (from 26 points). But Chevrolet dug in—Toyota bested Chevy by 38 points in 2011, down from 46 points the year before. Thus, relative to Ford and Honda, Toyota has rebounded from the hit that it took in 2010 linked to massive recalls.
 - ✓ 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 six of the factors, compared to four factors for Honda and just one for Chevrolet.
- Safety (page 21)
 - ✓ Volvo continued to have a substantial lead in the area of *safety*, with 49% of consumers who are aware of the brand naming it number one, but its safety score tumbled from 70% in 2010.
 - ✓ Also among the top ten, Ford remained in second place, while Toyota climbed by four positions to the number three slot. Honda and Mercedes-Benz shared fourth place. Cadillac, VW and GMC trucks replaced Audi, Lexus and BMW.



Implications (cont.)

- Quality (page 22)

- ✓ Toyota rebounded this year and returned as the perceived leader in *quality*, replacing Honda, which slipped to number two and shared that position with Ford. But the advantage of the leader over the second-place brand shrank to just 0.4 percentage point from 2.3 points in 2010.
- ✓ Mercedes-Benz and Chevrolet trailed at number four and five. Subaru and Dodge placed at number nine and ten, supplanting Nissan and Buick.

- Value (page 23)

- ✓ Ford retained the top spot, though Toyota swapped places with Honda for the number two spot. Even so, Ford's value score fell by 5.2 percentage points from 2010.
- ✓ Other brands that garnered strong perceptions of *value* were Hyundai and Chevrolet. Kia, Cadillac and Nissan maintained their places in the top ten from last year. Mercedes-Benz and Buick fell out of the top ten and were replaced by Subaru and Acura among the ranks of brands that deliver the most *value*.

- Performance (page 24)

- ✓ As in the December 2010 study, the leader in *performance* was BMW, but Ford displaced Porsche at number two, and Chevrolet and Toyota also gained at Porsche's expense.
- ✓ Fiskar (in a statistical tie with Toyota and Porsche) and Ferrari entered the study this year and immediately distinguished themselves as brands with exemplary perceptions of *performance*, while Dodge and Lexus exited the top ten. Honda fell three slots to number nine.



Implications (cont.)

- **Environmentally friendly or green (page 25)**
 - ✓ Toyota remained in the number one position on this attribute, but its score slid by 8 percentage points to 38%. Smart (32%) entered the study as the number two brand in terms of *green* credentials with approximately twice the score of number three Honda. Moreover, Toyota's advantage over the second-place make tumbled to just 6 percentage points from 28 points.
 - ✓ Tesla, another new brand finished at number six, behind Ford and Chevrolet, and Acura joined the top ten in ninth place. Scion, GMC trucks and Mini exited the top ten.
- **Design or style (page 26)**
 - ✓ Cadillac, number three last year, rose to first place, replacing BMW, which lost 7 percentage points. Porsche also took a hit as it left the leader's board after placing number two in 2010. Lincoln was another dropout as Acura and Ferrari climbed into the top ten.
- **Technology or innovation (page 27)**
 - ✓ The score of Mercedes-Benz for *technology/innovation* was essentially unchanged from last year, but it became the sole leader as Toyota, formerly tied for number one, fell to third place, behind Ford.
 - ✓ Lexus, BMW, Cadillac and Chevrolet retained their positions at numbers four, five, seven and eight. Tesla captured sixth place from Honda, and Acura also joined the top ten. Lincoln and Scion fell off the top ten list.



Implications (cont.)

- The next time consumers are in the market for a new car, they are most likely to buy Ford (16.5%) or Toyota (13.6%). Chevrolet would be chosen by 13.1%, and Honda by 8.6%. (pages 31-33)
- But calculated brand loyalty is highest for Toyota and Honda, with roughly 6 in 10 of current Toyota or Honda drivers likely to purchase their respective brand again. Compared to the December 2010 study, calculated brand loyalty was relatively stable for Chevy (55%) and Ford (54%). But it fell sharply for Dodge, with 28% of Dodge owners expecting to be loyal versus 35% last year. (page 34)
- The same four makes are on top of the list of other brands that consumers are considering for their next new car. In rank order, they are Ford (17%), Chevrolet (16%), Toyota (14%) and Honda (14%). They also 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. (pages 35-40)
- Evidently, among the top four brands (Toyota, Ford, Honda and Chevrolet), the competitive field has become relatively flat. Essentially, the differences perceived by car buyers have shrunk, because in the consumer's mind, there are now a variety of very good choices for a new vehicle.



Implications (cont.)

- Two questions about electric and plug-in cars rounded out the survey.
- A plurality (43%) of vehicle owners perceived electric and plug-in cars to be *equally safe* as traditional, gas-fueled models. One-fifth (20%) deemed them *safer* and 28% said *less safe*. (page 41)
 - ✓ Young consumers, those aged 18-44 years, were more likely than others to view the alternative power trains as *safer* (23% vs. 17%).
 - ✓ Perceived safety of electrics/plug-ins also was higher among consumers earning less than \$50,000.
- Overall, 87% of respondents expressed some kind of concern with electric or plug-in cars. (pages 42-43)
 - ✓ The leading concern was mentioned by three-quarters:
 - ⇒ Limited range—running out of energy on the road (77%)
 - ✓ Roughly 4 in 10 said:
 - ⇒ Fire risk during home recharging (42%)
 - ⇒ Pedestrian safety due to silent operation (40%)
 - ⇒ Crash protection for occupant (39%)
 - ✓ Around 3 in 10 expressed concern with:
 - ⇒ Post-crash fire (35%)
 - ⇒ Electric shock (30%)
 - ⇒ Accident avoidance—braking, handling or steering ability (29%)
 - ✓ Relative to men, women were more concerned with *pedestrian safety* and *electric shock*.



Household Car Ownership

- Most (83%) adults contacted said their household owns at least one car, and were qualified to proceed with the interview.
- 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	2,045	1,031	1,014	508	1,505	770	946
	%	%	%	%	%	%	%
Yes	83	85	81	84	82	74	92
No	17	15	19	16	18	26	8



Number One Factor for New-Car Purchase

- The leading factors that consumers said they keep in mind when shopping for a new car are *safety* (28%) and *quality* (24%).
- *Value* (16%) was the number three factor in terms of consideration, and it tied with *performance* (15%). Under 1 in 10 respondents singled out *environmentally friendly/green*, *design/style* or *technology/innovation*.
- Women deemed *safety* far more important than men (34% vs. 21%), while men placed more emphasis on *quality* and *value*.

AA2A - There are several things that you may consider when shopping for a new car. I am going to read you a list of factors. Please tell me which are the MOST important to you in evaluating a new

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
<u>Most Important</u>											
Safety	28	21	34	30	25	30	25	24	23	42	24
Quality	24	27	22	23	25	22	27	22	43	20	21
Value	16	18	14	16	17	15	17	12	14	14	32
Performance	15	16	14	16	14	16	15	31	11	12	13
Environmentally friendly or green	7	7	7	6	8	7	6	4	5	7	4
Design or style	5	6	4	4	6	4	6	5	3	3	3
Technology or innovation	3	4	2	4	2	4	3	2	1	1	2
Don't know/none of these	2	2	2	1	2	1	1	-	-	-	-



Top-Three Factors in New-Car Purchase

- When the top-three factors were regarded together, the rank order of factors was unchanged. *Safety* (65%) established a significant lead in the number one spot, eclipsing *quality* by 8 percentage points. Half of respondents identified *value* (51%) or the *performance* characteristics (49%) of the new vehicles under review as an important factor.
- The importance of *environmentally friendly/green* (29%) was slightly ahead of *design/style* (24%), and *technology/innovation* (18%) was last.
- Scores changed little from the study conducted in December 2010.

AA2ALL - There are several things that you may consider when shopping for a new car. I am going to read you a list of factors. [Mentioned first, second or third.]

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
<i>Most Important: First, Second or Third (Net)</i>											
Safety	65	57	73	67	63	69	63	58	59	100	58
Quality	57	57	57	56	59	57	59	50	100	52	53
Value	51	53	50	51	52	49	53	40	47	46	100
Performance	49	51	48	50	48	53	47	100	43	44	38
Environmentally friendly or green	29	26	32	30	27	29	29	18	21	27	20
Design or style	24	27	20	22	25	20	26	20	18	16	18
Technology or innovation	18	21	14	20	15	16	19	13	11	14	11
Don't know/none of these	3	3	3	1	4	3	2	0	1	1	1



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 2010, but scores edged up slightly.
 - ✓ Ford (87%/85% in 2010)
 - ✓ Chevrolet (76%/75%)
 - ✓ Toyota (70%/68%)
 - ✓ Honda (57%/52%)
- Two GM makes and one European make comprised tier 2, and scores rose substantially for all three from last year. At least 4 in 10 consumers reported awareness of Chrysler (45%/37% in 2010), Dodge (43%/31%) or BMW (41%/30%).
- The third tier was populated by three GM makes, three European and four Asian, and all registered gains of at least 5 percentage points versus 2010.
 - ✓ Cadillac (38%/32% in 2010)
 - ✓ Mercedes-Benz (36%/30%)
 - ✓ Nissan (36%/29%)
 - ✓ Hyundai (35%/25%)
 - ✓ GMC trucks (33%/23%)
 - ✓ Buick (32%/28%)
 - ✓ Lexus (31%/23%)
 - ✓ Kia (31%/22%)
 - ✓ Volvo (30%/21%)
 - ✓ Volkswagen (30%/19%)

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		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
Ford	87	87	86	88	86	86	88	86	87	87	87
Chevrolet	76	79	73	74	78	79	74	75	77	74	79
Toyota	70	73	67	71	69	63	73	67	72	67	71
Honda	57	59	56	60	54	48	63	53	59	57	58
Chrysler	45	50	40	41	48	42	47	44	48	45	46
Dodge	43	47	39	48	39	46	43	45	44	43	44
BMW	41	44	38	46	36	33	46	40	44	39	43
Cadillac	38	38	37	32	44	34	40	37	39	36	39
Mercedes-Benz	36	37	35	37	36	30	40	34	40	35	37
Nissan	36	40	31	35	36	33	38	34	36	34	37
Hyundai	35	39	31	36	34	29	40	33	37	33	37
GMC trucks	33	36	31	36	32	30	35	34	35	32	35
Buick	32	34	31	27	38	31	34	32	35	32	33
Lexus	31	30	33	34	29	26	35	31	33	31	32
Kia	31	30	31	33	28	28	33	27	31	30	32
Volvo	30	33	28	31	30	24	35	28	31	27	33
Volkswagen	30	29	31	29	31	26	33	29	32	28	33
Jeep	25	23	26	25	24	21	28	26	26	23	25
Audi	24	26	23	27	22	21	27	23	26	23	24
Subaru	24	24	24	24	24	22	25	23	25	24	25

AA4-AA6ALL - Total Unaided Awareness (cont.)

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
Acura	23	24	22	25	21	18	26	23	25	22	24
Mazda	21	23	19	23	20	18	23	21	22	20	23
Mitsubishi	20	20	19	22	18	19	20	19	19	18	21
Lincoln	19	21	17	18	20	16	21	20	20	18	20
Jaguar	19	20	17	18	20	15	21	17	20	17	21
Porsche	18	21	15	20	17	16	20	18	20	17	19
Infiniti	18	19	17	19	17	16	19	17	19	18	19
Mercury	17	17	17	16	18	15	18	16	19	15	18
Saab	16	17	14	14	17	13	18	14	17	15	17
Ferrari	15	17	13	16	15	13	17	15	16	13	15
Suzuki	15	17	13	15	14	14	16	16	16	14	16
Fiat	14	15	13	14	15	11	16	15	15	13	15
Land Rover	14	15	13	13	15	11	16	15	15	13	14
Scion	12	12	12	14	10	10	13	11	12	11	14
Mini	11	13	10	12	10	9	12	12	12	10	12
Smart	11	11	11	12	9	9	12	10	11	10	12
Tesla	7	8	5	7	7	6	7	6	8	6	7
Fiskar	4	5	3	5	3	3	5	4	5	4	4
Other	14	13	15	14	14	15	14	13	14	14	16
Don't know	28	22	34	24	30	30	24	27	28	27	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:
 - ✓ Total Score = 130.6 index
Across all seven factors, Toyota was considered a leader more often than any other brand, and more than twice as often as Cadillac (63.3 index).
 - ✓ Total Unaided Awareness = 69.9%
More than two-thirds of consumers interviewed reported being aware of Toyota.
 - ✓ Design/Style: FScore = 9.4%, FContrib = 7.2%
Among consumers aware of Toyota, 9.4% said that Toyota leads all other brands with *design/style*, and this factor accounted for 7.2% of exemplary mentions across all seven factors for Toyota.
 - ✓ Environmentally Friendly/Green: FContrib = 29.1%
Environmentally friendly/green contributed more than one-quarter of Toyota's leadership scores totaled across all seven factors. As a driver of the Toyota brand perception, *green* had more than four times the influence as *design or style* (7.2%).

Brand Perception Report

Base: Household Owns Car

	Total Score	Total Unaided Awareness		Design/Style		Performance		Quality		Safety		Tech./Innov.		Value		Env.Fr./Green	
	Index	Count	%	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib	FScore	FContrib
			%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Toyota	130.6	1,147	69.9	9.4	7.2	13.8	10.6	19.4	14.8	13.0	10.0	17.9	13.7	18.9	14.5	38.1	29.1
Ford	121.1	1,425	86.8	12.7	10.5	17.5	14.4	18.6	15.3	17.9	14.8	18.6	15.3	20.0	16.5	15.9	13.1
Honda	93.8	941	57.3	8.8	9.3	10.2	10.9	18.9	20.2	12.5	13.3	10.0	10.6	17.2	18.3	16.2	17.3
Chevrolet	92.2	1,247	76.0	13.2	14.3	16.8	18.3	13.6	14.8	12.0	13.0	10.3	11.2	14.4	15.7	11.8	12.8
Mercedes-Benz	83.6	596	36.3	14.3	17.1	11.5	13.7	16.1	19.2	12.4	14.9	21.3	25.5	6.2	7.4	1.8	2.2
BMW	69.3	673	41.0	14.9	21.6	19.3	27.8	9.4	13.6	5.9	8.5	13.6	19.6	4.4	6.3	1.8	2.6
Volvo	67.0	500	30.5	2.0	3.0	3.5	5.2	6.2	9.3	49.1	73.3	2.7	4.0	1.8	2.7	1.6	2.4
Cadillac	63.3	618	37.6	16.7	26.4	7.3	11.5	10.1	16.0	7.3	11.5	12.0	18.9	6.6	10.5	3.3	5.2
Lexus	54.4	514	31.3	13.8	25.3	6.1	11.3	8.5	15.6	4.3	7.9	14.8	27.3	4.5	8.3	2.4	4.4
Tesla	50.7	110	6.7	6.7	13.2	9.3	18.4	6.0	11.9	1.8	3.5	12.7	25.0	4.9	9.7	9.3	18.3
Smart	47.2	176	10.7	4.2	8.9	0.3	0.7	1.2	2.6	1.7	3.5	7.1	15.1	0.3	0.7	32.4	68.5
Acura	46.8	378	23.0	10.0	21.4	4.7	10.0	6.0	12.8	5.2	11.1	9.1	19.5	6.8	14.5	5.0	10.7
Audi	41.7	398	24.2	13.2	31.6	10.1	24.2	3.2	7.7	3.9	9.5	7.0	16.7	2.5	5.9	1.8	4.4
Subaru	41.3	390	23.8	3.2	7.7	5.2	12.5	7.3	17.6	10.4	25.3	2.5	6.0	7.8	18.9	5.0	12.1
Nissan	40.3	583	35.5	4.5	11.3	7.0	17.3	5.2	12.8	3.9	9.8	5.5	13.7	6.5	16.1	7.7	19.0
GMC trucks	38.2	547	33.3	6.0	15.8	6.6	17.2	5.7	14.8	6.4	16.8	4.4	11.4	5.0	13.2	4.1	10.9
Dodge	36.7	709	43.2	6.7	18.2	8.7	23.8	6.5	17.6	3.7	10.0	3.5	9.5	5.3	14.5	2.3	6.4
Buick	35.7	532	32.4	6.9	19.2	4.8	13.5	5.8	16.2	4.9	13.7	3.9	10.9	5.5	15.3	4.0	11.2
Hyundai	34.5	574	35.0	2.6	7.5	2.2	6.5	3.4	9.8	2.2	6.4	1.5	4.5	16.5	47.8	6.1	17.6
Volkswagen	31.2	495	30.1	2.7	8.6	2.9	9.3	5.2	16.8	6.7	21.4	2.6	8.4	6.5	20.7	4.6	14.8
Chrysler	31.2	734	44.7	7.2	23.1	4.0	12.7	3.4	11.0	4.7	15.2	4.8	15.2	4.7	15.1	2.4	7.6
Ferrari	28.9	248	15.1	9.3	32.3	12.8	44.4	0.0	0.0	0.0	0.0	1.6	5.4	5.0	17.2	0.2	0.7
Fiskar	28.5	68	4.2	2.7	9.5	13.6	47.7	2.1	7.4	0.9	3.0	4.1	14.5	3.8	13.3	1.3	4.5
Porsche	24.1	297	18.1	7.2	29.8	13.6	56.5	0.2	0.6	0.5	2.1	2.6	11.0	0.0	0.0	0.0	0.0
Scion	22.9	193	11.8	1.4	6.2	5.6	24.6	4.2	18.4	0.0	0.0	4.7	20.4	6.1	26.8	0.8	3.7
Lincoln	22.9	312	19.0	5.0	21.7	1.6	6.8	4.6	20.3	3.0	13.1	4.9	21.2	3.2	14.1	0.6	2.7
Kia	22.8	501	30.5	1.7	7.4	0.6	2.6	1.2	5.4	2.3	10.3	1.9	8.2	12.2	53.4	2.9	12.7
Jaguar	16.4	307	18.7	9.1	55.3	1.7	10.1	1.5	9.3	0.4	2.3	3.1	19.0	0.6	3.9	0.0	0.0
Mazda	16.1	348	21.2	4.7	29.1	1.8	11.3	3.9	23.8	1.1	6.6	1.9	12.0	1.8	11.2	1.0	5.9
Infiniti	15.8	293	17.9	5.8	36.8	2.5	16.0	2.1	13.2	0.6	4.0	2.8	17.7	0.4	2.7	1.5	9.6
Jeep	11.6	403	24.6	2.2	19.0	1.7	15.1	2.9	25.4	2.2	19.3	1.4	12.1	0.7	6.3	0.3	2.8
Suzuki	11.1	244	14.9	3.7	33.7	0.2	2.1	0.7	6.6	0.2	2.1	1.8	16.0	2.8	25.5	1.5	14.0
Mercury	10.1	273	16.7	1.6	15.9	1.7	16.4	1.3	13.0	1.3	13.1	1.6	15.4	1.3	13.0	1.3	13.2
Land Rover	8.3	229	13.9	0.9	10.3	1.3	15.7	1.6	19.7	1.7	20.5	1.4	16.5	1.0	12.4	0.4	5.0
Mitsubishi	7.2	320	19.5	1.5	21.3	0.8	11.5	0.0	0.0	0.6	9.0	2.0	27.9	0.3	3.7	1.9	26.6
Mini	7.2	182	11.1	4.0	55.3	0.4	4.9	0.0	0.0	0.0	0.0	1.3	17.7	0.0	0.0	1.6	22.1
Fiat	6.7	232	14.1	1.3	19.0	0.4	5.5	0.0	0.0	1.2	17.7	0.4	6.5	0.7	10.8	2.7	40.4
Saab	5.3	256	15.6	0.7	13.1	0.7	12.7	0.6	11.4	2.5	47.7	0.8	15.2	0.0	0.0	0.0	0.0



Top Ten: Overall

2011 Overall

Base: Household Owns Car

	Total Score	Total Unaided Awareness	
	Index	Count	%
Toyota	130.6	1,147	69.9
Ford	121.1	1,425	86.8
Honda	93.8	941	57.3
Chevrolet	92.2	1,247	76.0
Mercedes-Benz	83.6	596	36.3
BMW	69.3	673	41.0
Volvo	67.0	500	30.5
Cadillac	63.3	618	37.6
Lexus	54.4	514	31.3
Tesla	50.7	110	6.7

2010 Overall

Base: Household Owns Car

	Total Score
	Index
Toyota	147.4
Ford	143.9
Honda	121.0
Chevrolet	101.8
BMW	92.5
Mercedes-Benz	90.1
Volvo	84.4
Lexus	69.2
Cadillac	65.6
Subaru	50.1



Top Ten: Safety

2011 Position in Top-Three Factors: Number One (65%)

2011 Safety

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Volvo	49.1	500	30.5
Ford	17.9	1,425	86.8
Toyota	13.0	1,147	69.9
Honda	12.5	941	57.3
Mercedes-Benz	12.4	596	36.3
Chevrolet	12.0	1,247	76.0
Subaru	10.4	390	23.8
Cadillac	7.3	618	37.6
Volkswagen	6.7	495	30.1
GMC trucks	6.4	547	33.3

2010 Safety

Base: Household Owns Car

	Factor Score
	%
Volvo	70.4
Ford	20.4
Honda	16.8
Subaru	16.7
Mercedes-Benz	13.6
Chevrolet	12.8
Toyota	12.7
Audi	8.5
Lexus	7.8
BMW	7.0



Top Ten: Quality

2011 Position in Top-Three Factors: Number Two (57%)

2011 Quality

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Toyota	19.4	1,147	69.9
Honda	18.9	941	57.3
Ford	18.6	1,425	86.8
Mercedes-Benz	16.1	596	36.3
Chevrolet	13.6	1,247	76.0
Cadillac	10.1	618	37.6
BMW	9.4	673	41.0
Lexus	8.5	514	31.3
Subaru	7.3	390	23.8
Dodge	6.5	709	43.2

2010 Quality

Base: Household Owns Car

	Factor Score
	%
Honda	25.2
Ford	22.9
Toyota	19.2
Chevrolet	16.4
Mercedes-Benz	15.3
Cadillac	12.5
BMW	12.1
Lexus	11.9
Nissan	8.6
Buick	8.1



Top Ten: Value

2011 Position in Top-Three Factors: Number Three (51%)

2011 Value

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Ford	20.0	1,425	86.8
Toyota	18.9	1,147	69.9
Honda	17.2	941	57.3
Hyundai	16.5	574	35.0
Chevrolet	14.4	1,247	76.0
Kia	12.2	501	30.5
Subaru	7.8	390	23.8
Acura	6.8	378	23.0
Cadillac	6.6	618	37.6
Nissan	6.5	583	35.5

2010 Value

Base: Household Owns Car

	Factor Score
	%
Ford	25.3
Honda	24.4
Toyota	22.8
Hyundai	17.1
Chevrolet	15.2
Kia	14.3
Mercedes-Benz	9.5
Buick	6.8
Cadillac	6.7
Nissan	6.1



Top Ten: Performance

2011 Position in Top-Three Factors: Number Four (49%)

2011 Performance

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
BMW	19.3	673	41.0
Ford	17.5	1,425	86.8
Chevrolet	16.8	1,247	76.0
Toyota	13.8	1,147	69.9
Porsche	13.6	297	18.1
Fiskar	13.6	68	4.2
Ferrari	12.8	248	15.1
Mercedes-Benz	11.5	596	36.3
Honda	10.2	941	57.3
Audi	10.1	398	24.2

2010 Performance

Base: Household Owns Car

	Factor Score
	%
BMW	27.4
Porsche	20.5
Ford	19.3
Chevrolet	18.8
Audi	17.4
Honda	15.3
Toyota	14.9
Dodge	13.0
Mercedes-Benz	10.9
Lexus	9.4



Top Ten: Environmentally Friendly/Green

2011 Position in Top-Three Factors: Number Five (29%)

2011 Env. Friendly/Green

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Toyota	38.1	1,147	69.9
Smart	32.4	176	10.7
Honda	16.2	941	57.3
Ford	15.9	1,425	86.8
Chevrolet	11.8	1,247	76.0
Tesla	9.3	110	6.7
Nissan	7.7	583	35.5
Hyundai	6.1	574	35.0
Acura	5.0	378	23.0
Subaru	5.0	390	23.8

2010 Env. Fr./Green

Base: Household Owns Car

	Factor Score
	%
Toyota	45.9
Ford	18.1
Honda	17.2
Chevrolet	12.4
Scion	9.4
Subaru	9.0
Hyundai	5.9
GMC trucks	5.4
Nissan	5.4
Mini	5.2



Top Ten: Design or Style

2011 Position in Top-Three Factors: Number Six (24%)

2011 Design/Style

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Cadillac	16.7	618	37.6
BMW	14.9	673	41.0
Mercedes-Benz	14.3	596	36.3
Lexus	13.8	514	31.3
Chevrolet	13.2	1,247	76.0
Audi	13.2	398	24.2
Ford	12.7	1,425	86.8
Acura	10.0	378	23.0
Toyota	9.4	1,147	69.9
Ferrari	9.3	248	15.1

2010 Design/Style

Base: Household Owns Car

	Factor Score
	%
BMW	22.1
Porsche	19.8
Cadillac	19.6
Mercedes-Benz	17.9
Lexus	17.2
Ford	16.9
Chevrolet	15.6
Lincoln	12.1
Audi	11.3
Toyota	10.2



Top Ten: Technology or Innovation

2011 Position in Top-Three Factors: Number Seven (18%)

2011 Technology/Innovation

Base: Household Owns Car

	Factor Score	Total Unaided Awareness	
	%	Count	%
Mercedes-Benz	21.3	596	36.3
Ford	18.6	1,425	86.8
Toyota	17.9	1,147	69.9
Lexus	14.8	514	31.3
BMW	13.6	673	41.0
Tesla	12.7	110	6.7
Cadillac	12.0	618	37.6
Chevrolet	10.3	1,247	76.0
Honda	10.0	941	57.3
Acura	9.1	378	23.0

2010 Tech./Innov.

Base: Household Owns Car

	Factor Score
	%
Toyota	21.6
Mercedes-Benz	21.6
Ford	21.1
Lexus	17.6
BMW	17.1
Honda	13.6
Cadillac	11.2
Chevrolet	10.6
Lincoln	10.0
Scion	7.8



Car Driven Most Often

- The top three makes accounted for more than 4 in 10 vehicles that consumers drive most often:
 - ✓ Ford (14.9%/16.1% in 2010)
 - ✓ Chevrolet (14.4%/14.4%)
 - ✓ Toyota (12.3%/12.1%)

- Five other brands posted a share of at least 3%:
 - ✓ Honda (8.1%/9.3%)
 - ✓ Dodge (5.9%/5.8%)
 - ✓ Nissan (4.2%/4.6%)
 - ✓ GMC trucks (3.1%/2.4%)
 - ✓ Buick (3.0%/3.4%)

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

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702 %	886 %	816 %	431 %	1,244 %	574 %	864 %	837 %	986 %	1,081 %	885 %
Ford	14.9	17.0	12.8	14.5	14.7	18.5	13.2	14.8	15.3	14.9	14.7
Chevrolet	14.4	16.8	12.1	15.0	14.2	18.1	12.6	14.7	13.4	14.7	13.5
Toyota	12.3	9.9	14.6	12.1	12.6	8.6	13.7	12.1	13.5	12.4	11.4
Honda	8.1	7.2	9.1	8.1	8.1	4.0	10.2	7.1	7.6	8.1	8.6
Dodge	5.9	6.8	5.1	7.1	5.0	8.4	4.7	7.4	6.3	5.7	6.8
Nissan	4.2	5.0	3.5	4.3	4.3	3.6	4.5	3.5	4.4	3.4	5.4
GMC trucks	3.1	4.0	2.2	3.8	2.6	1.3	4.0	3.4	3.0	3.6	2.9
Buick	3.0	3.1	2.8	1.5	4.5	3.8	2.2	3.0	3.4	3.6	2.8
Chrysler	2.9	1.7	4.1	2.6	3.3	3.7	2.8	2.8	3.0	3.0	2.9
Jeep	2.7	2.0	3.5	3.5	2.1	2.3	3.3	3.4	2.5	2.8	1.9
Mazda	2.2	2.5	1.9	3.1	1.4	1.1	3.0	2.4	2.3	1.5	2.1
Volkswagen	2.1	2.3	2.0	2.7	1.4	1.8	2.4	2.4	2.4	2.1	2.7
Hyundai	1.9	2.0	1.7	0.9	2.7	1.8	1.9	1.7	1.7	1.7	2.2
Subaru	1.9	1.4	2.4	1.7	2.0	1.5	2.3	1.9	1.8	2.0	2.2
Kia	1.7	0.8	2.6	2.7	0.8	2.7	1.4	1.6	1.7	1.4	2.4
Lexus	1.5	1.5	1.6	1.1	2.1	0.3	2.5	0.8	1.5	1.4	1.5
Cadillac	1.5	0.9	2.1	0.4	2.6	1.9	1.1	1.7	1.4	1.6	1.4
Mercedes-Benz	1.3	1.1	1.5	1.2	1.5	0.4	1.9	1.3	2.0	1.4	1.3
BMW	1.3	1.9	0.7	1.7	0.8	1.1	1.4	1.5	1.5	1.6	0.6
Volvo	1.2	1.2	1.3	1.5	1.0	0.8	1.6	2.0	1.0	1.2	0.6

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

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
Mercury	1.2	0.9	1.5	0.6	1.8	1.2	1.3	0.8	1.4	1.2	1.5
Acura	1.0	0.7	1.3	1.3	0.8	0.9	1.1	0.9	1.2	0.4	1.6
Mitsubishi	0.9	0.9	0.9	1.2	0.6	1.3	0.6	0.7	0.6	1.3	0.7
Lincoln	0.9	0.9	0.8	0.2	1.5	0.7	0.9	1.1	0.8	0.8	0.9
Saab	0.4	0.3	0.5	0.4	0.4	0.3	0.5	0.6	0.1	0.6	0.5
Suzuki	0.4	0.7	0.1	0.6	0.3	0.8	0.3	0.7	0.2	0.3	0.3
Jaguar	0.3	0.4	0.2	-	0.4	0.1	0.3	0.1	0.3	0.3	0.2
Infiniti	0.2	0.3	0.1	0.3	0.1	0.2	0.2	0.1	0.1	0.3	0.3
Scion	0.2	0.4	-	0.3	0.1	-	-	-	0.3	0.2	0.4
Porsche	0.1	0.3	-	0.3	-	-	0.3	0.3	-	-	-
Audi	0.1	0.3	-	-	0.3	-	0.2	0.1	0.1	0.0	0.1
Mini	0.1	0.1	0.1	-	0.1	-	0.1	0.1	0.1	0.1	0.1
Land Rover	0.1	0.1	0.1	-	0.2	-	0.2	0.1	0.2	0.0	-
Fiat	0.0	0.1	-	-	0.1	-	-	0.1	0.1	-	-
Ferrari	0.0	0.1	-	-	0.1	-	0.1	-	-	0.1	0.1
Smart	-	-	-	-	-	-	-	-	-	-	-
Fiskar	-	-	-	-	-	-	-	-	-	-	-
Tesla	-	-	-	-	-	-	-	-	-	-	-
Other	3.7	3.1	4.4	3.5	4.1	5.6	2.6	3.5	4.0	4.0	4.8
Don't know/Don't drive/None	1.9	1.4	2.3	2.0	1.6	3.1	0.4	1.5	1.0	1.9	0.7



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 (16.5%/17.9% in 2010)
 - ✓ Toyota (13.6%/11.6%)
 - ✓ Chevrolet (13.1%/13.0%)
 - ✓ Honda (8.6%/10.3%)
- Gender differences:
 - ✓ Men were more likely to focus on a Ford (18.6% vs. 14.4% women) or a Chevrolet (15.2% vs. 11.1% women).
 - ✓ Women (15.5%) reported a stronger preference for Toyota than men (11.7%).

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		Factors			
	<u>TOTAL</u>	<u>Men</u>	<u>Women</u>	<u>18-44</u>	<u>45+</u>	<u><\$50K</u>	<u>\$50K+</u>	<u>Perform</u>	<u>Quality</u>	<u>Safety</u>	<u>Value</u>
UNWEIGHTED BASE	1,702 %	886 %	816 %	431 %	1,244 %	574 %	864 %	837 %	986 %	1,081 %	885 %
Ford	16.5	18.6	14.4	15.4	17.3	17.8	16.7	16.5	17.0	16.5	18.3
Toyota	13.6	11.7	15.5	14.1	13.1	10.5	14.5	13.3	15.6	13.0	13.4
Chevrolet	13.1	15.2	11.1	13.7	12.9	13.8	12.3	13.5	12.1	12.7	13.3
Honda	8.6	7.6	9.6	9.0	8.4	6.2	10.2	7.8	7.4	9.8	8.2
Dodge	3.4	4.0	2.9	4.0	3.1	5.3	2.3	4.2	2.9	3.8	3.1
Nissan	3.1	2.7	3.5	3.3	2.7	2.5	3.4	3.4	3.0	3.1	3.0
BMW	3.1	4.7	1.5	4.0	2.3	3.4	3.4	3.7	2.8	2.8	1.9
Subaru	2.9	1.8	3.9	3.0	2.7	3.8	2.7	2.4	3.1	2.9	2.4
Buick	2.6	2.6	2.6	1.1	4.2	3.4	2.3	2.9	2.8	2.8	2.6
GMC trucks	2.4	2.7	2.0	3.3	1.5	2.1	2.7	2.2	2.3	2.8	2.4
Hyundai	2.3	3.1	1.5	1.8	2.7	3.0	1.8	1.6	1.9	2.2	2.7
Cadillac	2.2	1.6	2.9	1.1	3.2	1.6	2.5	2.0	2.2	2.4	2.0
Mercedes-Benz	1.9	1.3	2.4	1.9	1.7	1.1	2.3	2.2	2.3	2.1	1.3
Volkswagen	1.8	1.4	2.1	2.4	1.1	2.0	1.6	1.9	1.5	1.3	1.8
Lexus	1.8	1.8	1.7	1.8	1.8	0.3	2.7	1.6	2.3	1.1	1.3
Kia	1.5	1.3	1.8	1.8	1.3	1.9	1.5	2.0	1.3	1.0	2.1
Mazda	1.3	1.5	1.2	1.9	0.9	0.8	1.6	1.5	1.2	0.9	1.7
Chrysler	1.3	1.2	1.4	0.7	2.0	2.4	0.7	1.3	1.3	1.5	1.3
Audi	1.1	1.3	0.9	1.6	0.6	0.6	1.6	0.4	1.7	0.9	1.3
Jeep	1.1	1.2	0.9	0.4	1.7	1.3	1.0	1.5	1.3	0.6	1.1

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		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
Volvo	0.8	0.5	1.1	0.7	0.9	0.2	1.0	1.0	0.6	1.1	0.6
Acura	0.7	1.0	0.4	0.4	1.0	0.4	1.0	0.6	1.0	0.8	0.7
Lincoln	0.5	0.5	0.6	0.2	0.8	0.3	0.6	0.8	0.6	0.5	0.4
Mitsubishi	0.5	0.8	0.3	1.0	0.1	0.6	0.6	0.3	0.4	0.5	0.4
Mercury	0.4	0.2	0.5	0.2	0.5	0.5	0.3	0.5	0.3	0.4	0.5
Mini	0.3	0.1	0.5	0.5	0.1	0.5	0.1	0.1	0.4	0.4	-
Scion	0.2	-	0.5	0.5	-	0.7	-	-	-	0.4	0.5
Infiniti	0.2	0.2	0.2	-	0.4	-	0.3	0.3	0.2	0.3	0.1
Saab	0.2	0.1	0.3	0.1	0.2	0.3	-	0.2	0.2	0.2	0.3
Porsche	0.2	0.4	-	0.3	0.1	0.1	0.3	0.2	0.1	-	0.2
Suzuki	0.2	0.3	-	0.3	0.1	0.1	0.3	0.3	0.1	0.2	0.3
Jaguar	0.2	0.1	0.2	-	0.3	-	0.3	0.1	0.1	0.2	0.1
Land Rover	0.1	0.1	0.1	0.1	0.1	-	0.1	0.1	0.2	0.1	0.1
Smart	-	-	-	-	-	-	-	-	-	-	-
Ferrari	-	-	-	-	-	-	-	-	-	-	-
Fiat	-	-	-	-	-	-	-	-	-	-	-
Fiskar	-	-	-	-	-	-	-	-	-	-	-
Tesla	-	-	-	-	-	-	-	-	-	-	-
Other	0.5	0.5	0.6	0.4	0.7	0.3	0.5	0.7	0.4	0.6	0.6
I do not buy cars/Don't drive	1.1	0.7	1.5	1.3	0.9	2.6	0.2	0.8	1.1	0.9	1.3
Don't know	8.4	7.2	9.6	7.5	8.8	9.3	6.6	8.3	8.3	9.4	8.7



Brand Loyalty

- Analysis of makes under consideration versus those currently driven yielded a calculation of brand loyalty. Relative to a year ago, only Dodge registered a significant change (down 7 percentage points).
 - ✓ Two makes tied as the leaders in calculated brand loyalty, with roughly 6 in 10 of current Toyota or Honda drivers likely to purchase a Toyota or Honda, respectively, for their next new car. Compared to the December 2010 study, brand loyalty edged up for Toyota (from 58%) and slipped modestly for Honda (from 59%).
 - ✓ Chevrolet drivers ranked number three in terms of calculated loyalty—55% are thinking about a new Chevy (57% last year).
 - ✓ Ford (54%) was close behind; it was unchanged from December 2010 (53%).
 - ✓ Under 3 in 10 (28%) of Dodge owners expect to be loyal, down from 35% a year ago.
- Among the top four brands, the competitive field has become relatively flat. Essentially, the differences perceived by car buyers have shrunk, because in the consumer's mind, there are now a variety of very good choices for a new vehicle.

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	241 %	92 %	250 %	138 %	207 %	745 %
Chevrolet	55	7	7	5	4	7
Dodge	2	28	2	1	1	2
Ford	9	24	54	6	8	9
Honda	2	9	7	57	5	3
Toyota	7	8	6	4	60	7
Other (Net)	18	21	13	20	13	60
I do not buy cars/Don't drive	1	-	-	1	-	2
Don't know	6	2	10	5	9	10



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 more than 6 in 10 of respondents:
 - ✓ Ford (16.8%)
 - ✓ Chevrolet (16.2%)
 - ✓ Toyota (14.5%)
 - ✓ Honda (14.2%)
- Two other makes are being considered by at least 1 in 20 consumers:
 - ✓ Dodge (8.1%)
 - ✓ Nissan (6.2%)
- In the number seven position, Hyundai (4.2%) replaced Cadillac, whose consideration score fell to 3.1% from 5.2% last year.

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

	<u>TOTAL</u>	<u>Gender</u>		<u>Age</u>		<u>HHld Income</u>		<u>Factors</u>			
		<u>Men</u>	<u>Women</u>	<u>18-44</u>	<u>45+</u>	<u><\$50K</u>	<u>\$50K+</u>	<u>Perform</u>	<u>Quality</u>	<u>Safety</u>	<u>Value</u>
UNWEIGHTED BASE	1,684 %	879 %	805 %	427 %	1,230 %	562 %	861 %	829 %	977 %	1,074 %	876 %
Ford	16.8	19.4	14.2	18.1	16.0	17.1	17.2	16.3	16.1	16.1	18.5
Chevrolet	16.2	18.4	14.1	18.7	14.2	20.2	15.1	16.6	16.3	16.5	18.9
Toyota	14.5	17.9	11.1	15.3	13.9	13.6	15.9	11.3	13.6	14.6	15.3
Honda	14.2	13.8	14.6	16.7	11.8	13.4	15.4	14.0	15.6	12.7	16.1
Dodge	8.1	9.4	6.7	10.4	6.0	10.7	7.5	9.9	8.1	7.2	9.0
Nissan	6.2	6.2	6.3	8.1	4.6	5.1	7.0	5.4	7.0	6.4	6.4
Hyundai	4.2	4.2	4.2	4.4	4.0	3.1	5.0	3.7	3.6	4.0	4.4
Mercedes-Benz	3.5	5.0	2.1	4.7	2.5	2.6	4.6	3.7	3.3	3.3	3.8
Chrysler	3.5	3.5	3.6	3.7	3.4	4.5	3.6	3.8	3.5	3.2	3.1
Lexus	3.4	2.6	4.1	2.9	3.6	2.0	3.9	3.2	2.9	3.4	3.4
GMC trucks	3.3	4.7	1.9	3.4	3.1	3.0	3.4	3.3	3.0	3.1	4.4
BMW	3.3	4.1	2.5	3.5	2.9	1.4	4.2	3.2	3.7	2.9	3.4
Cadillac	3.1	3.7	2.4	2.4	3.6	2.8	3.0	4.0	3.2	2.2	3.0
Volkswagen	3.0	3.7	2.4	3.3	2.9	2.0	3.7	3.3	2.8	3.3	3.3
Buick	3.0	3.3	2.8	1.7	4.2	3.5	2.4	3.4	2.1	3.2	2.7
Jeep	3.0	2.9	3.0	4.0	2.1	2.6	3.5	2.8	3.3	3.5	3.0
Kia	2.9	3.0	2.7	3.9	1.9	3.3	2.6	2.6	2.5	3.2	3.7
Subaru	2.9	3.3	2.4	2.7	3.0	1.3	3.4	2.3	3.3	3.3	2.6
Audi	2.5	3.1	1.9	2.7	2.3	1.5	3.4	3.0	3.2	2.6	1.9
Volvo	1.6	2.1	1.1	1.7	1.2	0.7	2.3	1.0	1.6	2.1	1.5

**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		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,684	879	805	427	1,230	562	861	829	977	1,074	876
	%	%	%	%	%	%	%	%	%	%	%
Infiniti	1.5	1.7	1.3	2.0	1.0	0.3	2.1	1.9	0.9	1.6	1.3
Lincoln	1.3	1.5	1.2	0.5	1.9	1.4	1.2	1.3	0.9	1.6	1.5
Acura	1.1	1.2	0.9	1.7	0.5	1.2	1.1	1.6	0.6	0.9	0.9
Mazda	0.9	0.7	1.1	1.2	0.7	0.2	1.5	0.6	1.1	0.8	1.0
Land Rover	0.8	0.3	1.3	1.2	0.4	0.3	1.3	1.1	1.2	0.6	0.5
Mitsubishi	0.6	0.6	0.6	0.9	0.4	1.0	0.5	0.8	0.7	0.8	0.4
Mini	0.6	0.6	0.6	0.5	0.7	0.2	0.8	0.7	0.7	0.5	0.6
Jaguar	0.6	1.0	0.2	0.8	0.2	0.1	0.9	0.2	0.5	0.7	0.4
Mercury	0.5	0.4	0.6	0.5	0.5	0.3	0.6	0.7	0.3	0.6	0.8
Porsche	0.4	0.4	0.5	0.7	0.2	-	0.8	0.7	0.1	0.2	0.2
Scion	0.3	0.3	0.3	0.6	-	-	-	-	0.5	0.2	0.6
Saab	0.3	0.4	0.1	0.3	0.2	0.2	0.4	0.4	0.2	0.4	0.3
Suzuki	0.2	0.4	0.1	0.2	0.3	0.5	0.1	0.3	0.4	0.4	-
Fiat	0.2	0.4	-	0.3	0.1	-	0.1	0.3	0.1	0.1	0.2
Tesla	0.2	-	0.4	0.3	0.1	-	0.3	-	0.1	0.2	0.2
Smart	0.2	-	0.4	-	0.4	0.2	0.1	0.1	0.2	-	0.3
Ferrari	0.1	0.2	-	0.2	0.1	-	0.2	0.1	0.1	0.1	0.2
Fiskar	-	-	-	-	-	-	-	-	-	-	-
Other	1.2	0.9	1.5	1.1	1.3	1.2	0.8	1.1	1.2	1.5	1.3
No other brands	4.4	4.0	4.9	3.1	5.7	4.3	4.5	5.4	4.1	4.5	3.0
Don't know	3.0	1.8	4.3	2.8	3.2	3.0	2.0	2.5	3.3	2.7	3.1



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 (33.4%)
 - ✓ Chevrolet (29.5%)
 - ✓ Toyota (28.2%)
 - ✓ Honda (22.9%)

- The second tier of brands trailed substantially:
 - ✓ Dodge (11.5%)
 - ✓ Nissan (9.3%)

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	1,684	879	805	427	1,230	562	861	829	977	1,074	876
	%	%	%	%	%	%	%	%	%	%	%
Ford	33.4	38.2	28.6	33.7	33.4	35.4	33.9	33.0	33.2	32.7	37.1
Chevrolet	29.5	33.7	25.4	32.6	27.2	34.3	27.4	30.1	28.5	29.3	32.4
Toyota	28.2	29.6	26.8	29.6	27.2	24.4	30.5	24.7	29.4	27.7	28.8
Honda	22.9	21.4	24.3	25.8	20.3	19.7	25.6	21.8	23.1	22.5	24.4
Dodge	11.5	13.5	9.6	14.4	9.1	16.2	9.8	14.1	11.1	11.0	12.1
Nissan	9.3	8.9	9.8	11.5	7.3	7.7	10.4	8.8	10.1	9.5	9.4
Hyundai	6.5	7.2	5.7	6.2	6.8	6.1	6.8	5.2	5.5	6.2	7.1
BMW	6.4	8.8	4.0	7.5	5.2	4.9	7.6	7.0	6.6	5.7	5.3
Subaru	5.8	5.2	6.4	5.8	5.8	5.2	6.2	4.7	6.4	6.3	5.1
GMC trucks	5.7	7.4	4.0	6.8	4.7	5.2	6.2	5.5	5.3	5.9	6.8
Buick	5.7	5.9	5.4	2.7	8.4	7.0	4.6	6.3	4.9	6.1	5.4
Mercedes-Benz	5.4	6.3	4.6	6.7	4.2	3.8	6.9	5.9	5.6	5.4	5.2
Cadillac	5.3	5.3	5.3	3.6	6.8	4.5	5.5	6.0	5.4	4.6	5.0
Lexus	5.1	4.5	5.8	4.7	5.4	2.4	6.7	4.9	5.2	4.6	4.7
Chrysler	4.8	4.7	5.0	4.3	5.4	7.0	4.3	5.1	4.8	4.8	4.5
Volkswagen	4.8	5.2	4.5	5.7	4.0	4.1	5.3	5.2	4.3	4.6	5.1
Kia	4.4	4.3	4.5	5.7	3.2	5.2	4.1	4.7	3.8	4.3	5.8
Jeep	4.1	4.2	4.0	4.4	3.8	3.9	4.5	4.3	4.6	4.2	4.1
Audi	3.6	4.4	2.8	4.3	2.9	2.1	4.9	3.3	4.8	3.5	3.2
Volvo	2.4	2.6	2.2	2.4	2.1	0.9	3.2	2.0	2.2	3.2	2.1

AA7,8ALL - Total Consideration (cont.)

Base: Buy Cars

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,684	879	805	427	1,230	562	861	829	977	1,074	876
	%	%	%	%	%	%	%	%	%	%	%
Mazda	2.3	2.2	2.3	3.1	1.6	1.0	3.1	2.2	2.3	1.7	2.8
Lincoln	1.9	2.0	1.8	0.7	2.8	1.8	1.8	2.0	1.5	2.0	1.9
Acura	1.8	2.3	1.3	2.1	1.5	1.6	2.1	2.2	1.6	1.7	1.6
Infiniti	1.7	1.9	1.5	2.0	1.4	0.3	2.3	2.2	1.1	1.9	1.4
Mitsubishi	1.1	1.4	0.9	1.9	0.5	1.7	1.1	1.1	1.1	1.3	0.8
Land Rover	0.9	0.4	1.4	1.4	0.5	0.3	1.4	1.2	1.4	0.7	0.6
Mercury	0.9	0.6	1.2	0.8	1.0	0.8	0.9	1.2	0.6	1.0	1.3
Mini	0.9	0.7	1.0	1.0	0.8	0.8	0.9	0.8	1.1	0.8	0.6
Jaguar	0.7	1.0	0.4	0.8	0.5	0.1	1.2	0.2	0.6	0.9	0.5
Porsche	0.6	0.7	0.5	1.0	0.3	0.1	1.1	0.9	0.2	0.2	0.4
Scion	0.5	0.3	0.8	1.1	-	0.7	-	-	0.5	0.6	1.0
Saab	0.5	0.5	0.4	0.5	0.5	0.5	0.4	0.6	0.5	0.6	0.6
Suzuki	0.4	0.7	0.1	0.4	0.4	0.6	0.4	0.6	0.5	0.6	0.3
Fiat	0.2	0.4	-	0.3	0.1	-	0.1	0.3	0.1	0.1	0.2
Tesla	0.2	-	0.4	0.3	0.1	-	0.3	-	0.1	0.2	0.2
Smart	0.2	-	0.4	-	0.4	0.2	0.1	0.1	0.2	-	0.3
Ferrari	0.1	0.2	-	0.2	0.1	-	0.2	0.1	0.1	0.1	0.2
Fiskar	-	-	-	-	-	-	-	-	-	-	-
Other	1.7	1.3	2.1	1.4	2.0	1.5	1.3	1.8	1.6	2.1	1.8
Don't know	11.3	9.0	13.5	10.1	11.7	12.3	8.2	10.5	11.4	11.9	11.8



Perceived Safety of Electric/Plug-in Cars

- A plurality (43%) of vehicle owners perceived electric and plug-in cars to be *equally safe* as traditional, gas-fueled models. One-fifth (20%) deemed them *safer* and 28% said *less safe*.
- Young consumers, those aged 18-44 years, were more likely than others to view the alternative power trains as *safer* (23% vs. 17%). Perceived safety of electrics/plug-ins also was higher among consumers earning less than \$50,000.

AA9 - How safe do you perceive electric and plug-in cars to be compared to traditional, gas-fueled cars? Do you think that electric and plug-in cars are...

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
<i>Much/Somewhat Safer (Net)</i>	20	20	20	23	17	24	18	19	19	20	17
Much safer than gas-fueled cars	6	6	5	7	4	5	6	4	5	6	5
Somewhat safer	14	13	15	17	12	19	12	14	14	14	12
Equally safe	43	46	41	47	41	39	48	41	44	42	46
Somewhat less safe	17	16	18	15	18	16	17	18	16	17	19
Much less safe than gas-fueled cars	11	12	10	9	12	12	10	14	12	11	11
<i>Somewhat/Much Less Safe (Net)</i>	28	28	27	24	30	28	27	32	28	28	29
Don't know	9	6	12	5	12	10	7	9	9	10	8



Concerns With Electric/Plug-in Cars

- Overall, 87% of respondents expressed some kind of concern with electric or plug-in cars. The leading concern was mentioned by three-quarters:
 - ✓ Limited range—running out of energy on the road (77%)
- Roughly 4 in 10 said:
 - ✓ Fire risk during home recharging (42%)
 - ✓ Pedestrian safety due to silent operation (40%)
 - ✓ Crash protection for occupant (39%)
- Around 3 in 10 expressed concern with:
 - ✓ Post-crash fire (35%)
 - ✓ Electric shock (30%)
 - ✓ Accident avoidance—braking, handling or steering ability (29%)
- Relative to men, women were more concerned with *pedestrian safety* and *electric shock*.

AA10ALL - Are you concerned about any of the following with an electric or plug-in car?

Base: Household Owns Car

	TOTAL	Gender		Age		HHld Income		Factors			
		Men	Women	18-44	45+	<\$50K	\$50K+	Perform	Quality	Safety	Value
UNWEIGHTED BASE	1,702	886	816	431	1,244	574	864	837	986	1,081	885
	%	%	%	%	%	%	%	%	%	%	%
<u>Any Concern (Net)</u>	<u>87</u>	<u>89</u>	<u>85</u>	<u>87</u>	<u>87</u>	<u>89</u>	<u>86</u>	<u>88</u>	<u>87</u>	<u>88</u>	<u>88</u>
Limited range--running out of energy on the road	77	78	76	76	79	79	77	80	77	78	78
Fire risk during home recharging	42	40	45	45	39	48	39	46	42	46	39
Pedestrian safety due to silent operation	40	36	44	39	41	44	38	44	41	44	38
Crash protection for occupant	39	37	41	40	38	43	38	42	38	42	35
Post-crash fire	35	35	36	36	35	40	33	39	35	38	34
Electric shock	30	24	36	31	29	38	25	35	29	34	26
Accident avoidance--braking, handling or steering ability	29	27	30	30	28	34	25	35	28	32	26
Other (specify)	3	3	3	3	3	3	3	2	3	3	3
None of these	10	9	11	11	10	7	12	9	9	9	9
Don't know	3	2	4	2	4	4	2	3	4	3	3



Profile

- **Women and men were equally represented in the poll, and the median age of respondents was 46 years.**
- **Overall, 42% of participants reported having at least a four-year college degree, but 33% had no education beyond high school.**
- **Median household income of interviewed consumers was \$61,000, and 40% said they are employed full time.**
- **Most respondents (58%) said they are married, and three-quarters (78%) identified themselves as Caucasian.**

Profile

Base: Household Owns Car

	TOTAL	Gender		Region			
		Men	Women	NthEast	Midwest	South	West
UNWEIGHTED BASE	1,702	886	816	295	377	620	410
	%	%	%	%	%	%	%
<u>GENDER</u>							
Male	50	100	-	50	51	48	50
Female	50	-	100	50	49	52	50
<u>AGE</u>							
18-34	30	34	27	36	23	32	31
35-44	18	17	18	15	20	16	19
45-54	19	18	20	19	20	17	19
55-64	16	14	17	14	17	17	13
65+	16	15	17	14	18	16	15
Refused/Nr	2	2	1	2	1	1	2
MEDIAN (years)	45.6	43.0	46.9	43.0	47.9	45.5	43.4
<u>EDUCATION</u>							
Some HS or less	6	8	5	4	5	8	6
HS graduate	26	28	25	26	28	29	21
Some college	25	23	27	16	29	23	34
College grad+ [Net]	42	40	43	53	38	40	39
College grad	23	20	25	33	22	20	20
Postgrad degree	19	20	18	20	15	20	19
Refused/Nr	1	1	0	1	-	1	0
<u>HOUSEHOLD INCOME</u>							
Under \$25,000	12	13	11	10	13	12	14
\$25,000 but less than \$50,000	25	22	27	20	26	27	23
\$50,000 but less than \$75,000	25	22	27	20	22	26	29
\$75,000 but less than \$100,000	12	12	11	15	12	12	8
\$100,000 or more	21	24	19	27	20	19	22
Refused	6	6	5	8	7	5	4
MEDIAN (000s)	\$60.7	\$62.8	\$58.9	\$69.6	\$59.2	\$58.8	\$59.6

Profile (cont.)

Base: Household Owns Car

	TOTAL	Gender		Region			
		Men	Women	NthEast	Midwest	South	West
UNWEIGHTED BASE	1,702	886	816	295	377	620	410
	%	%	%	%	%	%	%
EMPLOYMENT							
Employed full time	40	48	33	46	42	38	39
Retired	19	18	20	17	21	20	17
Not currently employed	11	11	11	13	10	12	7
Employed part time	10	7	13	8	6	11	13
Self-employed	8	9	6	7	8	8	8
Homemaker	7	1	13	5	7	7	8
Student	5	6	4	4	7	4	7
Refused/Nr	0	0	0	0	0	0	0
MARITAL STATUS							
Married	58	61	56	52	62	59	60
Single and never been married	21	24	19	30	19	19	21
Divorced	9	7	10	8	9	10	8
Widowed	6	3	8	5	6	5	6
Living as married	4	2	5	3	3	4	4
Separated	2	1	2	2	1	2	2
Refused/Nr	1	1	0	0	1	1	0
SPANISH/HISPANIC/LATINO							
Yes	13	16	11	9	5	13	25
No	85	82	89	89	95	86	73
Refused/Nr	1	2	1	1	1	1	1
RACE*							
White/Caucasian	78	75	80	83	88	73	71
Black/African-American	11	10	11	11	7	17	3
Asian/Asian-American	2	2	1	2	1	1	3
Some other race	12	15	10	6	5	12	26
Refused/Nr	2	2	1	1	1	2	2

*Multiple responses allowed

Profile (cont.)

Base: Household Owns Car

	TOTAL	Gender		Region			
		Men	Women	NthEast	Midwest	South	West
UNWEIGHTED BASE	1,702	886	816	295	377	620	410
	%	%	%	%	%	%	%
REGION							
North East	18	18	18	100	-	-	-
Midwest	22	23	21	-	100	-	-
South	37	36	39	-	-	100	-
West	23	23	22	-	-	-	100
METROPOLITAN CLASSIFICATION							
Urban (Net)	49	50	49	50	47	45	57
In center city of metro area	31	29	32	25	33	31	33
Outside center city, inside center city county	18	20	16	25	14	14	25
Suburban (Net)	27	28	27	38	25	28	20
Inside suburban county of metro area	24	25	23	29	25	28	12
In metro area with no center city	4	3	4	9	-	0	8
Rural: In non-metro area	24	22	25	12	28	27	22



Appendix: Questionnaire

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 There are several things that you may consider when shopping for a new car. I am going to read you a list of factors. Please tell me which ONE is the MOST important to you in evaluating a new car.

AA2B SECOND most important?

AA2C THIRD most important?

(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER FOR EACH. RECORD FIRST ANSWER ON FIRST SCREEN, SECOND ANSWER ON SECOND SCREEN, AND THIRD ANSWER ON THIRD SCREEN)
[RANDOMIZE]

01 Design or style

02 Environmentally friendly or green

03 Performance

04 Quality

05 Safety

06 Technology or innovation

07 Value

99 DON'T KNOW/NONE OF THESE

AA3 I will read you the list of factors again. 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. Environmentally friendly or green

C. Performance

D. Quality

E. Safety

F. Technology or innovation

G. Value

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' OR
 'CHEVROLET')
 (DO NOT READ LIST. RECORD AS MANY AS APPLY)

- 01 ACURA
- 02 AUDI
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 FISKAR
- 09 FORD
- 10 GMC TRUCKS
- 11 HONDA
- 12 OMITTED
- 13 HYUNDAI
- 14 INFINITI
- 15 OMITTED
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 MERCURY
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 SAAB
- 31 OMITTED
- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 SUZUKI
- 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' OR 'CHEVROLET')
(DO NOT READ LIST. RECORD ONE ANSWER FOR EACH ITEM)
[RANDOMIZE ITEMS]

- 01 ACURA
- 02 AUDI
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 FISKAR
- 09 FORD
- 10 GMC TRUCKS
- 11 HONDA
- 12 OMITTED
- 13 HYUNDAI
- 14 INFINITI
- 15 OMITTED
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 MERCURY
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 SAAB
- 31 OMITTED
- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 SUZUKI
- 42 TESLA
- 36 TOYOTA
- 37 VOLKSWAGEN
- 38 VOLVO
- 95 OTHER (SPECIFY)

99 DON'T KNOW/NONE

- A. Design or style
- B. Environmentally friendly or green
- C. Performance
- D. Quality
- E. Safety
- F. Technology or innovation
- G. Value

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' OR
 'CHEVROLET')
 (DO NOT READ LIST. RECORD ONE ANSWER)

- 01 ACURA
- 02 AUDI
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 FISKAR
- 09 FORD
- 10 GMC TRUCKS
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- 15 OMITTED
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- 17 JEEP
- 18 KIA
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 MERCURY
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 SAAB
- 31 OMITTED
- 32 SCION

- 33 SMART
- 34 SUBARU
- 35 SUZUKI
- 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' OR 'CHEVROLET')

(DO NOT READ LIST. RECORD ONE ANSWER)

- 01 ACURA
- 02 AUDI
- 03 BMW
- 04 BUICK
- 05 CADILLAC
- 06 CHEVROLET
- 07 CHRYSLER
- 08 DODGE
- 39 FERRARI
- 40 FIAT
- 41 FISKAR
- 09 FORD
- 10 GMC TRUCKS
- 11 HONDA
- 12 OMITTED
- 13 HYUNDAI
- 14 INFINITI
- 15 **OMITTED**
- 16 JAGUAR
- 17 JEEP
- 18 KIA
- 19 LAND ROVER
- 20 LEXUS
- 21 LINCOLN
- 22 MAZDA
- 23 MERCEDES-BENZ
- 24 MERCURY
- 25 MINI
- 26 MITSUBISHI
- 27 NISSAN
- 28 OMITTED
- 29 PORSCHE
- 30 SAAB
- 31 OMITTED

- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 SUZUKI
- 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 (01-42)]

AA8 In addition to [INSERT ANSWER, A7 (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 MEANS 'BUICK', 'CADILLAC' OR 'CHEVROLET']

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

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

- 28 OMITTED
- 29 PORSCHE
- 30 SAAB
- 31 OMITTED
- 32 SCION
- 33 SMART
- 34 SUBARU
- 35 SUZUKI
- 42 **TESLA**
- 36 TOYOTA
- 37 VOLKSWAGEN
- 38 VOLVO
- 95 OTHER (SPECIFY)
- 98 NO OTHER BRANDS
- 99 DON'T KNOW

AA9 How safe do you perceive electric and plug-in cars to be compared to traditional, gas-fueled cars? Do you think that electric and plug-in cars are . . .
(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)
[ROTATE TOP TO BOTTOM, BOTTOM TO TOP]

- 01 Much safer than gas-fueled cars
- 02 Somewhat safer
- 03 Equally safe
- 04 Somewhat less safe
- 05 Much less safe than gas-fueled cars
- 99 DON'T KNOW

AA10 Are you concerned about any of the following with an electric or plug-in car?
(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH)
[RANDOMIZE]

- 01 Accident avoidance -- braking, handling or steering ability
- 02 Crash protection for occupant
- 03 Electric shock
- 04 Fire risk during home recharging
- 05 Limited range -- running out of energy on the road
- 06 Pedestrian safety due to silent operation
- 07 Post-crash fire
- 95 OTHER (SPECIFY)
- 98 NONE OF THESE
- 99 DON'T KNOW