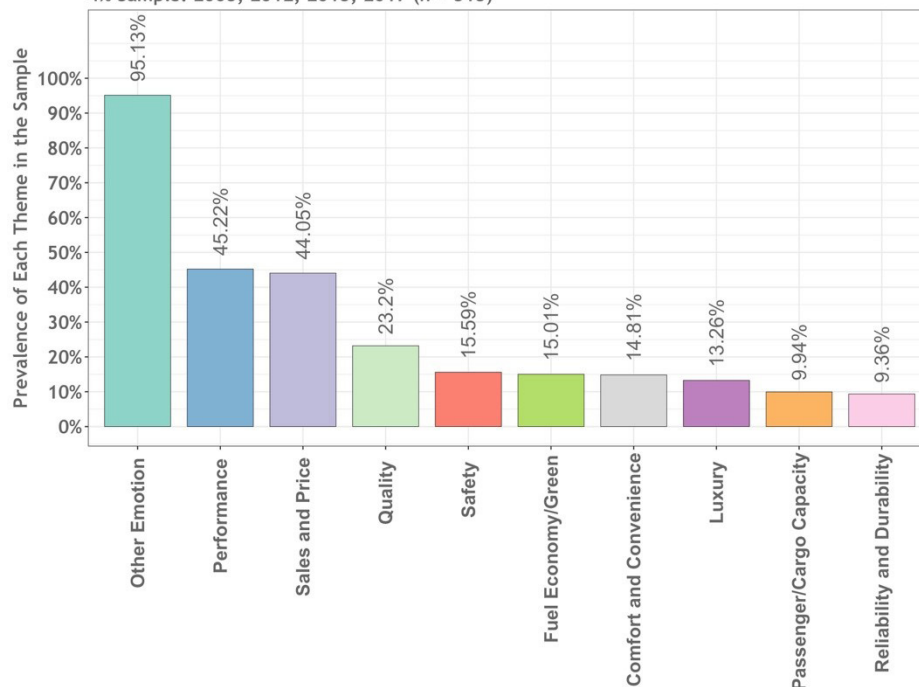


What are Automakers Trying to Sell? Fuel Economy and Safety Take a Back Seat

The U.S. auto industry invests heavily in advertising, spending nearly \$14 billion per year between 2008 and 2014. Two automakers — Ford and General Motors — were among the top 10 advertisers in the United States in 2016, and the automotive industry was second only to retail in [spending on digital advertising in 2018](#). A new study examines the messages automakers are sending consumers through those dollars.

Most Prevalent Themes in Advertising¹

Figure E.1. Theme Frequency
4% Sample: 2005, 2012, 2015, 2017 (n = 513)



Key Findings of New Analysis of Auto Advertising:

- Emotional appeals appear in almost all auto ads (**97%**).
- Performance-related attributes (**45%**) were mentioned **3x** more often than either safety (**16%**) or fuel economy/green² (**15%**) attributes.
- "Sales" (bonus cash, low APR, sale events) were close behind performance at **44%**.
- Advertisements for plug-in/electric vehicles varied between **0%** and **1.4%** across the study years.

¹The "Other Emotion" category covers emotional appeals not tied to the other 9 categories in Figure E.1, but, some of these other categories also include specific emotional appeals, so overall, 97% of ads included emotional appeals.

²Note that the fuel economy/green theme contains references to eco-friendliness and greenness that are not necessarily tied to specific, physical features of a vehicle that deliver fuel economy. If the data were restricted to only such features, this theme would be less prevalent.

Advertising Trends for Fuel Economy and Safety

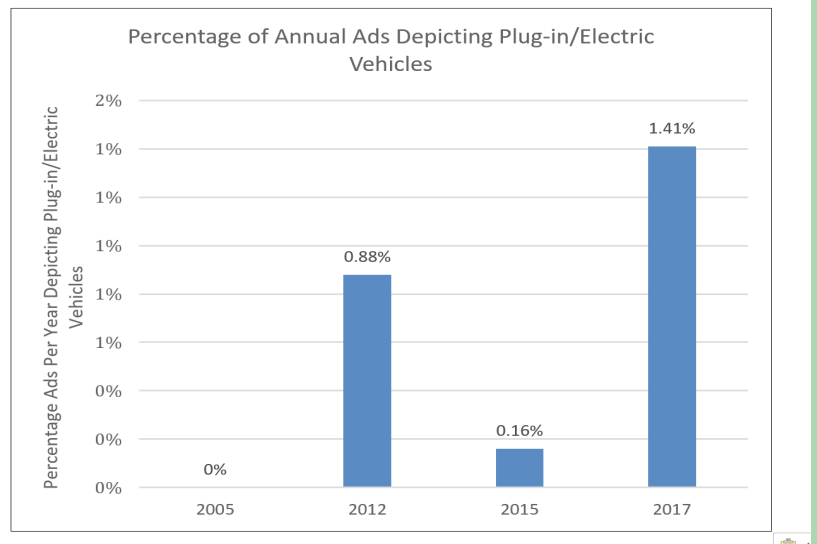
Fuel economy/green

- In 2017, fuel economy/green was only featured in **7%** of ads and ranked last of the 10 themes.
- The fuel economy/green theme is most prevalent (**30%** of ads) in 2012, the year in the sample characterized by poor economic conditions and high gas prices.

Safety

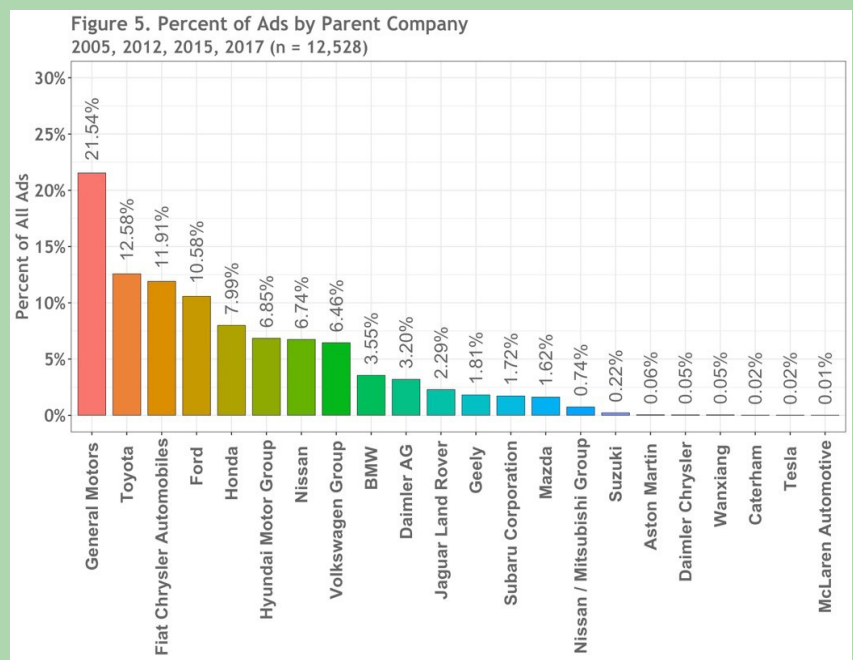
- Among parent companies, the most likely to feature safety in ads were **Volkswagen** (26%), **Toyota** (26%), and **Hyundai** (25%), while the least likely to feature safety in ads were **Nissan** (3%) and **Fiat-Chrysler** (1%).
- Minivans and SUVs are the vehicle type most likely to be promoted with a safety-themed ad, while pickup and sports car ads appear least likely.
- Safety falls **roughly in the middle** of 10 ad content themes ordered by prevalence.
- Nearly **16%** of the ads in the sample contain safety.

Electric Vehicle Advertising



Advertisements for electric vehicles make up a tiny fraction of overall auto ads.

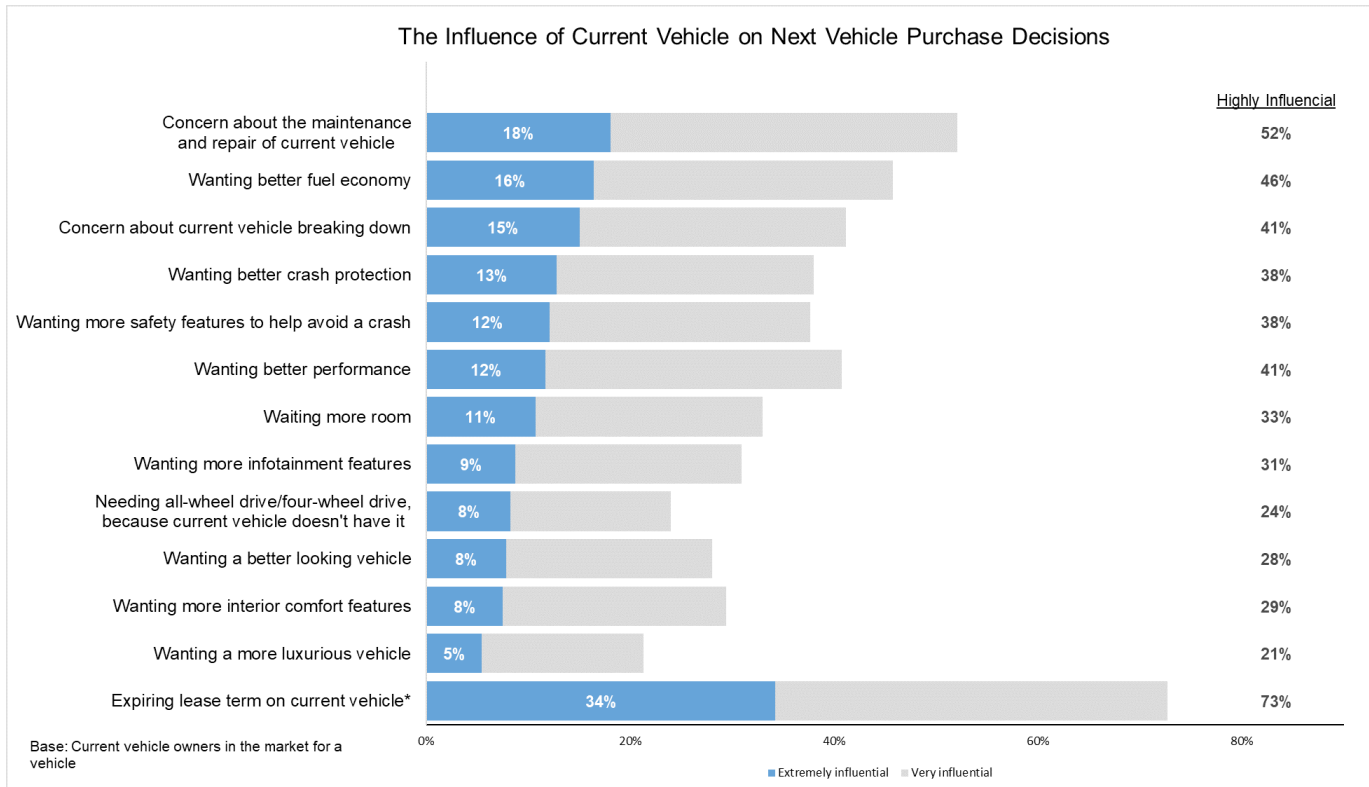
Unique Ads by Parent Company



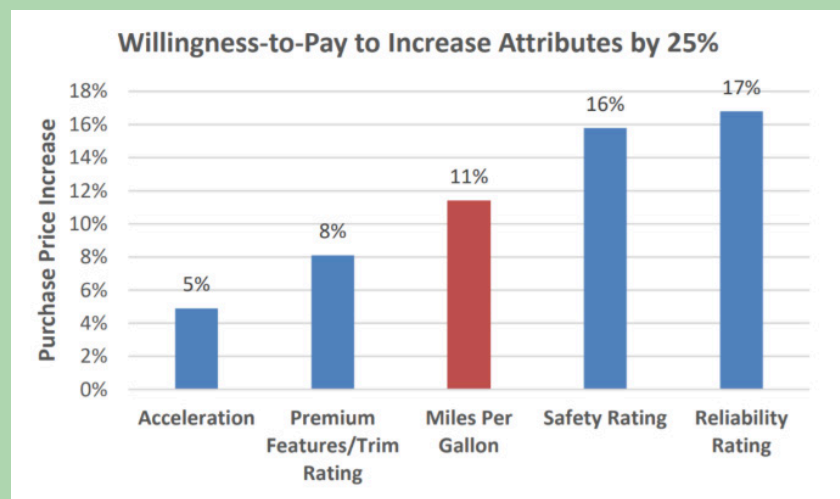
General Motors produced the most unique ads (**22%** of all ads in the dataset), followed after a nearly ten-point drop by Toyota (**13%**), Fiat Chrysler (**12%**), and Ford (**11%**).

There is a Gap between Market Options and Automaker Advertising vs. What Consumers Actually Value

Reliability, fuel economy and safety are the most important influencing factors in whether consumers will buy a replacement vehicle.



- Auto buyers are willing to pay 2-3 times more for improvements to fuel economy and safety than they are for acceleration.
- Fuel economy is the number one attribute vehicle owners would like to see improved in their next vehicle, beating out performance features such as horsepower and off-road capability by a factor of four.



- And yet, fuel economy **choices are limited in the market**, with 2/3rds of car models getting within 5 mpg of the model average and nearly 2/3rds (63%) of truck models getting within 3 mpg of the model average.

Bottom Line: Fuel Economy Information Matters, But Nearly MIA in Automaker Ads

Automaker Advertising Choices Affect the Efficiency of Vehicles Sold

- Nearly one-third (30%) of vehicle owners reported they **hadn't obtained any information about their current vehicle's MPG** before purchasing or leasing.
- Only 15% of auto buyers reported learning fuel economy information from **advertising**.
- The window sticker was the **only source of MPG information** for 23% of all current vehicle owners.

Improving the fuel economy of larger and less efficient vehicles is a **consumer priority**, but the market is **not meeting that need**.

- Drivers of cars averaging less than 20 MPG were almost **three times more likely** than drivers of cars averaging 30 MPG or more to select fuel economy as an attribute **most in need of improvement**.
- Auto buyers were willing to pay **40% more to boost fuel economy** from 20 mpg than for the same mpg increase from 25 or 30 mpg.

When Consumers Have Information on Fuel Economy, They Select More Efficient Vehicles

- Auto buyers who saw fuel economy information when selecting their preferred vehicle chose more efficient vehicles in a realistic choice experiment.
- In the same experiment, auto buyers who saw fuel economy information ranked fuel economy higher in importance relative to other attributes.
- Auto buyers' valuation of fuel economy can vary depending on the information provided.

Methodology: Conducted by Dr. Gwen Arnold of University of California, Davis, the auto ad analysis relied on a random sample of advertisements for light-duty vehicles released via television, print, or online in the United States in 2005, 2012, 2015, and 2017. A team of researchers reviewed stratified random samples of 513 and 627 ads derived from a larger population of ads (12,528) provided by a media monitoring company. The ten most common categories were performance, sales, quality, safety, fuel economy/green, comfort/convenience, luxury, passenger/cargo capacity and reliability/durability. In addition to identifying the prevalence of these ten themes, the analysis identified whether an ad's message was an emotional appeal or a physical description of the vehicle itself.