



# NEW CAR INSIGHTS REPORT

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The New Car Insights Report, brought to you by the AutoTrader.com Trend Engine, provides analysis of new car shopping activity on AutoTrader.com each month.

The report takes an in-depth look at which new car models are making big moves, what's driving segment level changes, which new car models are the most viewed, and what's happening with asking prices.

As a top site for car shoppers with millions of unique visitors each month, AutoTrader.com and its site activity offer a unique, nationwide snapshot of the vehicles shoppers are considering.

## In the February Issue:

- Big Movers: Fuel-Efficient Cars Make the Biggest Moves
- Segment Tracker: Compact Car Segment Posts Largest Month-Over-Month Increase
- Most Viewed: Fuel-Efficient Vehicles Leap onto List of Most-Viewed New Vehicles
- Price Tracker: Optima and Focus Post Notable Increases in Median Asking Price

## Small and Fuel-Efficient Cars Make Big Gains as Gas Prices Increase

As gas prices crept up to a national average of nearly \$3.40 per gallon in January, shoppers quickly turned their attention to smaller and more fuel-efficient vehicles. According to the January 2012 AutoTrader.com Tracking Study, which tracks consumer sentiments on a number of topics related to the economy, 54% of new vehicle shoppers indicated that their vehicle choice was affected by gas prices. Analysts noted that gas prices are at a historical high for this time of year compared to the year prior, with an expectation that prices could rise even higher as demand picks up in the summer and refining capacity becomes tighter.

This sentiment was certainly reflected in consumer shopping behavior on AutoTrader.com, as smaller, more fuel-efficient vehicles accounted for over half of the spots on the list of Big Movers in January, and the Ford Focus and Kia Optima broke into the list of the top 20 Most-Viewed New Vehicles on AutoTrader.com. The significant increases experienced by compact cars buoyed the segment as a whole, which posted an increase in shopper interest of 1.1 share points from December 2011 to January 2012.

### Big Movers: Fuel-Efficient Cars Make the Biggest Moves

On the list of Big Movers, which includes vehicles that have experienced a significant increase in shopper interest month-over-month, compacts and hybrids took 11 of the 20 spots on the list.



The Buick Verano made the biggest jump month-over-month, with a 95.7% increase in share of consumer interest. The Subaru Impreza came in at No. 2 with a 39.4% increase in shopper interest, landing the car at No. 2 on the list.

Nevertheless, it was Toyota that claimed the most fuel-efficient vehicles on the list of Big Movers of any automaker, with four of the eleven spots. The Toyota Prius experienced an increase in consumer interest of 38.1%, and interest in the recently released Toyota Prius V increased 23.7%. These two vehicles easily have the highest MPG rating of any vehicles on the list, with the Prius getting 50 mpg combined and the Prius V getting 42 mpg combined. In addition to these hybrids, Toyota had two compact cars on the list: the Toyota Corolla and Yaris, with experienced increases of 20% and 19.5%, respectively.

Analysts noted that Toyota appears to be starting the year off strong in the compact and midsize car segments. After a 2011 filled with numerous challenges for the popular automaker, these early indicators of returning shopper interest bode well for the brand.

There were several compact vehicles from domestic automakers on the list of Big Movers as well, with the Chevrolet Sonic, Dodge Caliber, Ford Focus and Chevrolet Cruze experiencing notable increases in consumer interest. The Sonic experienced an increase of 31.8%, the Caliber experienced an increase of 28.8%, the Focus experienced an increase of 27.6% and the Cruze experienced an increase of 19.6%.

In the past, domestic automakers haven't fared as well in the compact segment as their foreign counterparts, but there are numerous exciting domestic small cars that are enabling these automakers to hold their own in this competitive segment. The recently redesigned Focus has been generating a lot of buzz, and rightfully so. It received a warm welcome in the industry, and shoppers have certainly begun taking notice of this car, as evidenced in their behavior on AutoTrader.com.

While the Cruze has been among the top five most-viewed new compacts on the site, the all-new Sonic burst onto the scene with a strong introduction in 2011 and has continued on a mostly upward trajectory in regard to consumer interest on the AutoTrader.com site. The Dodge Caliber, while not typically one of the most-viewed compacts on AutoTrader.com, benefitted from the introduction of the Dodge Dart, which will replace the Caliber in the Dodge lineup in the 2013 model year. The Dart was introduced at the North American International Auto Show in Detroit in early January.

The other compact to make a big move in January was the Mitsubishi Lancer with an increase of 21.5%.

**Figure 1: Big Movers in New Vehicle Interest based on Increase in Share**

| Make       | Model            | MOM Share Increase |
|------------|------------------|--------------------|
| Buick      | Verano           | 95.7%              |
| Subaru     | Impreza          | 39.4%              |
| Toyota     | Prius            | 38.1%              |
| Chevrolet  | Sonic            | 31.8%              |
| Mitsubishi | Lancer Evolution | 29.1%              |
| Dodge      | Caliber          | 28.8%              |
| Ford       | Focus            | 27.6%              |
| GMC        | Terrain          | 27.5%              |
| Mazda      | CX-7             | 26.5%              |
| Toyota     | Prius V          | 23.7%              |
| Mitsubishi | Lancer           | 21.5%              |
| Honda      | CR-V             | 20.6%              |
| Dodge      | Durango          | 20.4%              |
| Dodge      | Nitro            | 20.4%              |
| Toyota     | Corolla          | 20.0%              |
| Chevrolet  | Cruze            | 19.6%              |
| Toyota     | Yaris            | 19.5%              |
| Mazda      | MAZDASPEED3      | 19.5%              |
| Kia        | Optima           | 19.5%              |
| Buick      | Regal            | 19.1%              |

### Segment Tracker: Compact Car Segment Posts Largest Month-Over-Month Increase

A number of interesting trends emerged at the segment level. Month-over-month, the compact car segment posted the largest increase in share of interest, at 1.1 points (nearly twice as much as any other segment), while the full-size truck segment posted the largest decrease in share of interest at 1.7 points (three times as much as any other segment). These trends support the assertion that the increase in gas prices in January had some effect on which cars shoppers are considering; however, analysts pointed out that it's also important to consider the year-over-year trending as well. As a segment, full-size trucks are up significantly from their position in January 2011, while the compact segment is down 1.5 share points in the same time frame, indicating that there is still a sizable portion of the shopping audience that wants—and needs—larger trucks, which are typically associated with many work-related endeavors.



Figure 2: Segment Tracker - All Segments by Share of New Vehicle Interest

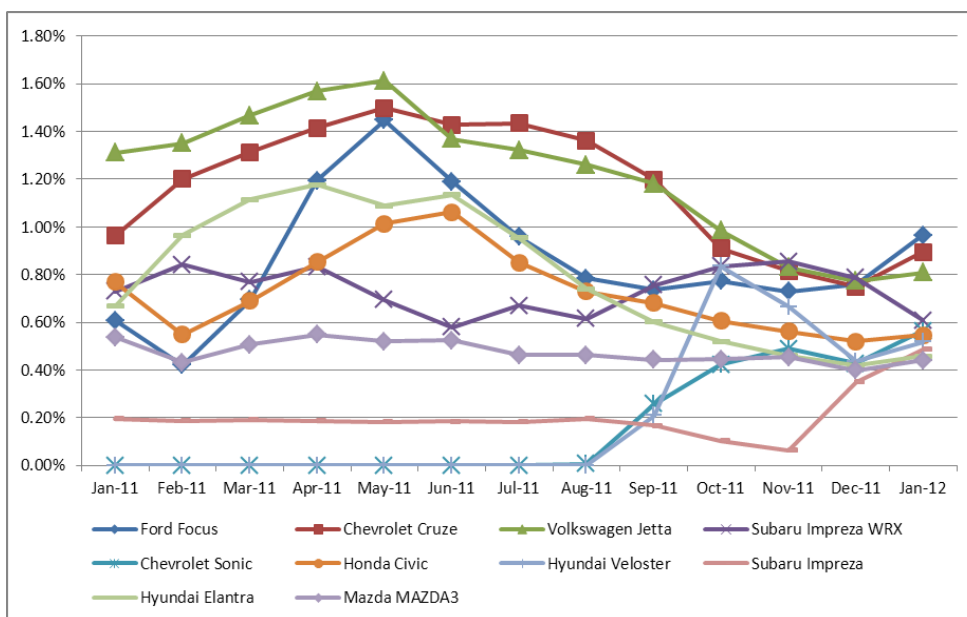
| Jan 2012 Rank | Segment         | Rank Change from Dec '11 | Rank Change from Jan '11 | Rank Change from Jan '10 | Trend of Share (prev 13 mo) |
|---------------|-----------------|--------------------------|--------------------------|--------------------------|-----------------------------|
| 1             | Full-size Truck | ↓ -1.7                   | ↑ 3.3                    | ↑ 5.9                    |                             |
| 2             | Midsize SUV     | ↑ 0.6                    | ↓ -0.2                   | ↑ 0.2                    |                             |
| 3             | Compact Car     | ↑ 1.1                    | ↓ -1.5                   | ↓ -1.4                   |                             |
| 4             | Luxury Car      | ↓ -0.6                   | ↓ -0.3                   | ↓ -2.6                   |                             |
| 5             | Sports Car      | ↑ 0.1                    | ↑ 0.4                    | ↑ 1.3                    |                             |
| 6             | Midsize Car     | ↑ 0.7                    | ↓ -0.6                   | ↓ -1.3                   |                             |
| 7             | Luxury SUV      | ↓ -0.4                   | ↓ -0.8                   | ↓ -1.3                   |                             |
| 8             | Compact SUV     | ↑ 0.1                    | ↓ -1.2                   | ↓ -0.6                   |                             |
| 9             | Full-size SUV   | ↓ -0.2                   | ↑ 0.4                    | ↑ 0.6                    |                             |
| 10            | Full-size Car   | ↑ 0.1                    | ↑ 1.2                    | ↑ 0.1                    |                             |
| 11            | Compact Truck   | ↑ 0.1                    | ↑ 0.2                    | ↑ 0.2                    |                             |
| 12            | Van             | ↑ 0.1                    | ↓ -0.5                   | ↓ -0.8                   |                             |
| 13            | Exotic          | ↔ 0.0                    | ↓ -0.4                   | ↓ -0.5                   |                             |

Month-Over-Month Compact Increases

Mirroring the trend seen in the list of Big Movers for January, the compact car segment showed strong gains in January, which was enough to move this popular segment into the No. 3 rank in January, overtaking the luxury car segment, which held that position the month before.

In looking at the 10 most viewed compact cars on AutoTrader.com, it's clear that the segment was buoyed by strong gains by the Ford Focus, Chevrolet Cruze and Subaru Impreza, and nine out of the 10 models all showed some increases in shopper interest month-over-month.

Figure 3: Compact Car Segment - Share of Interest for 10 Most Viewed Models

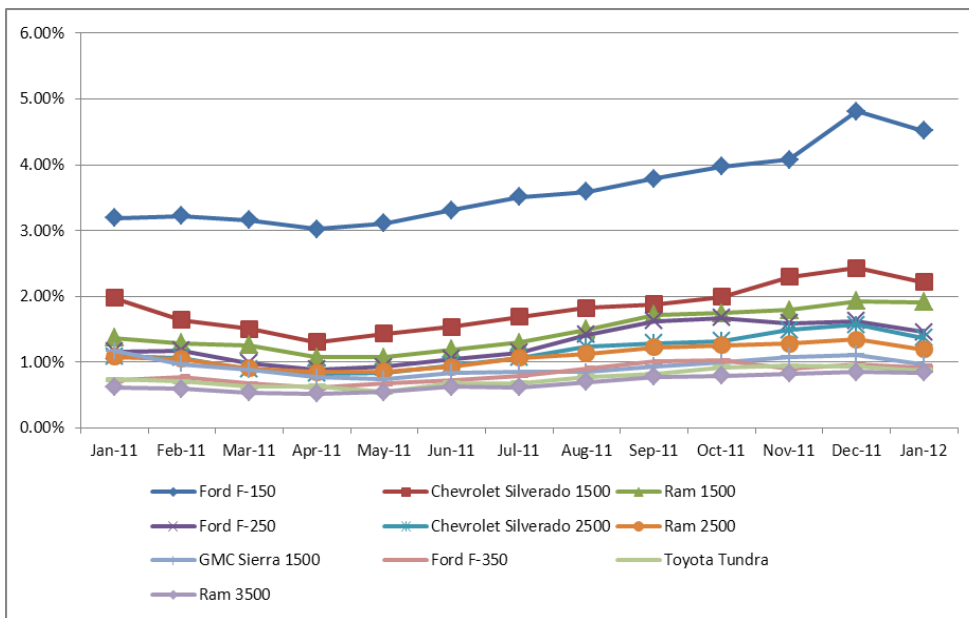




### Month-Over-Month Full-Size Truck Declines

Full-size trucks, while still retaining the No. 1 position, dropped 1.7 share points month-over-month. Nevertheless, the full-size truck segment is still far ahead where it was one and two years ago. As noted in the [January New Car Insights Report](#), numerous trucks posted significant gains across the board in December, which also bolstered the segment’s overall share of shopper interest for that month. Though a month-over-month decline of 1.7 share points from December to January is notable, the segment is still faring well overall. Below is a look at the 10 most-viewed full-size trucks on AutoTrader.com in January, which shows moderate declines in interest in all models from December 2011 to January 2012.

**Figure 4: Full-Size Truck Segment - Share of Interest for 10 Most Viewed Models**



### Most Viewed: Fuel-Efficient Vehicles Leap onto list of Most-Viewed New Vehicles on AutoTrader.com

Continuing the trend of big movements for smaller, more fuel-efficient vehicles, the Ford Focus leapt an impressive 33 spots year-over-year to land at No. 17 on the list of Most Viewed New Vehicles on AutoTrader.com, which ranks the top 20 new vehicles on the site each month based on consumer shopping behavior. From December 2011 to January alone, the Focus moved up 12 spots. The Focus was the only compact car that made the list in January.

While the Focus was the only compact vehicle on the list, it wasn’t the only vehicle known for its fuel efficiency to make a big leap. The midsize Kia Optima was the only new vehicle from its segment to land in the top 20 in January, moving up 21 spots year-over-year (eight of those from December to January) to No. 20 on the list.

If gas prices continue their upward trajectory, more fuel efficient vehicles will likely appear on the list in the coming months, analysts noted.



Figure 5: Top 20 Most-Viewed Models by New Vehicle Interest

| Jan 2012 Rank | Make      | Model          | Rank Change from Dec '11 |    | Rank Change from Jan '11 |    | Rank Change from Jan '10 |     | Trend of Share (prev 13 mo) |
|---------------|-----------|----------------|--------------------------|----|--------------------------|----|--------------------------|-----|-----------------------------|
| 1             | Ford      | F-150          | ⇒                        | 0  | ⇒                        | 0  | ↑                        | 1   |                             |
| 2             | Ford      | Mustang        | ⇒                        | 0  | ⇒                        | 0  | ↑                        | 2   |                             |
| 3             | Jeep      | Wrangler       | ↑                        | 1  | ↑                        | 2  | ↑                        | 2   |                             |
| 4             | Chevrolet | Silverado 1500 | ↓                        | 1  | ↓                        | 1  | ↓                        | 1   |                             |
| 5             | Chevrolet | Camaro         | ⇒                        | 0  | ↓                        | 1  | ↓                        | 4   |                             |
| 6             | Ram       | 1500           | ↑                        | 1  | ↑                        | 3  | ↑                        | 7   |                             |
| 7             | Jeep      | Grand Cherokee | ↓                        | 1  | ↑                        | 1  | ↑                        | 55  |                             |
| 8             | Dodge     | Challenger     | ↑                        | 2  | ↓                        | 1  | ↑                        | 11  |                             |
| 9             | Ford      | F-250          | ↓                        | 1  | ↑                        | 4  | ↑                        | 1   |                             |
| 10            | Toyota    | Tacoma         | ↑                        | 2  | ↑                        | 6  | ↓                        | 2   |                             |
| 11            | Chevrolet | Corvette       | ⇒                        | 0  | ↓                        | 1  | ↑                        | 3   |                             |
| 12            | Ford      | Explorer       | ↑                        | 2  | ↓                        | 6  | ↑                        | 90  |                             |
| 13            | Chevrolet | Silverado 2500 | ↓                        | 4  | ↑                        | 1  | ↑                        | 4   |                             |
| 14            | Dodge     | Charger        | ↑                        | 1  | ↑                        | 53 | ↑                        | 66  |                             |
| 15            | Ram       | 1500           | ↓                        | 2  | ⇒                        | 0  | ↑                        | 5   |                             |
| 16            | Chrysler  | 300            | ↑                        | 1  | ↑                        | 87 | ↑                        | 93  |                             |
| 17            | Ford      | Focus          | ↑                        | 12 | ↑                        | 33 | ↑                        | 39  |                             |
| 18            | GMC       | Sierra 1500    | ↓                        | 2  | ↓                        | 6  | ↓                        | 2   |                             |
| 19            | Ford      | F-350          | ↑                        | 1  | ↑                        | 15 | ↑                        | 11  |                             |
| 20            | Kia       | Optima         | ↑                        | 8  | ↑                        | 21 | ↑                        | 114 |                             |

\* N/A - Vehicle was not available in reported month

**Price Tracker: Optima and Focus Post Notable Increases in Median Asking Price**

Prices for the majority of the most-viewed new vehicles in January increased, with the Kia Optima posting the biggest increase in that time frame. Driven by the higher price point for the recently redesigned model, the median asking price for the Optima increased 23.4% from January 2011 to January 2012. The current median asking price for the Optima listed on AutoTrader.com is \$27,008.

The other fuel-efficient vehicle on the list, the Ford Focus, also showed a notable increase in its median asking price year-over-year, at 10.1%. As the least expensive new vehicle on the list, the Focus currently has a median asking price of \$20,980.



Figure 6: Price Tracker - Top 20 Most-Viewed Models by New Vehicle Interest

| Jan 2012 Rank | Make      | Model          | Median Inventory Listing Price | Price Change from Dec '11 |       | Price Change from Jan '11 |       | Price Change from Jan '10 |        |
|---------------|-----------|----------------|--------------------------------|---------------------------|-------|---------------------------|-------|---------------------------|--------|
| 1             | Ford      | F-150          | \$38,397                       | ↓                         | -0.2% | ↑                         | 3.4%  | ↑                         | 8.0%   |
| 2             | Ford      | Mustang        | \$30,403                       | ↓                         | -0.4% | ↓                         | -7.8% | ↓                         | -3.3%  |
| 3             | Jeep      | Wrangler       | \$31,300                       | ↓                         | -0.3% | ↑                         | 6.0%  | ↑                         | 8.5%   |
| 4             | Chevrolet | Silverado 1500 | \$35,000                       | ↑                         | 0.3%  | ↑                         | 2.5%  | ↑                         | 0.2%   |
| 5             | Chevrolet | Camaro         | \$33,110                       | ↓                         | -2.2% | ↑                         | 4.1%  | ↓                         | -6.3%  |
| 6             | Ram       | 1500           | \$34,665                       | ↑                         | 0.1%  | ↓                         | -2.7% | ↑                         | 1.0%   |
| 7             | Jeep      | Grand Cherokee | \$37,870                       | ↓                         | -0.8% | ↑                         | 1.3%  | ↑                         | 4.5%   |
| 8             | Dodge     | Challenger     | \$30,935                       | ↑                         | 0.4%  | ↓                         | -3.0% | ↓                         | -18.0% |
| 9             | Ford      | F-250          | \$47,815                       | ↓                         | -0.8% | ↓                         | -3.4% | ↑                         | 5.5%   |
| 10            | Toyota    | Tacoma         | \$29,230                       | ↓                         | -0.1% | ↑                         | 1.9%  | ↑                         | 5.4%   |
| 11            | Chevrolet | Corvette       | \$62,767                       | ↓                         | -0.4% | ↑                         | 0.3%  | ↓                         | -0.4%  |
| 12            | Ford      | Explorer       | \$39,049                       | ↑                         | 0.9%  | ↑                         | 4.2%  | ↑                         | 11.3%  |
| 13            | Chevrolet | Silverado 2500 | \$40,978                       | ↓                         | -0.8% | ↓                         | -5.1% | ↓                         | -2.7%  |
| 14            | Dodge     | Charger        | \$30,320                       | ↓                         | -0.9% | ↑                         | 7.9%  | ↑                         | 6.5%   |
| 15            | Ram       | 1500           | \$46,988                       | ↑                         | 0.1%  | ↑                         | 0.2%  | ↓                         | -2.9%  |
| 16            | Chrysler  | 300            | \$35,651                       | ↑                         | 0.9%  | ↑                         | 9.0%  | ↑                         | 3.4%   |
| 17            | Ford      | Focus          | \$20,980                       | →                         | 0.0%  | ↑                         | 10.1% | ↑                         | 12.1%  |
| 18            | GMC       | Sierra 1500    | \$36,845                       | ↑                         | 0.5%  | ↑                         | 3.4%  | ↑                         | 1.9%   |
| 19            | Ford      | F-350          | \$52,585                       | ↑                         | 0.5%  | ↓                         | -1.2% | ↑                         | 6.6%   |
| 20            | Kia       | Optima         | \$27,008                       | ↓                         | -0.2% | ↑                         | 23.4% | ↑                         | 35.1%  |

\* N/A - Vehicle was not available in reported month

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