

Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

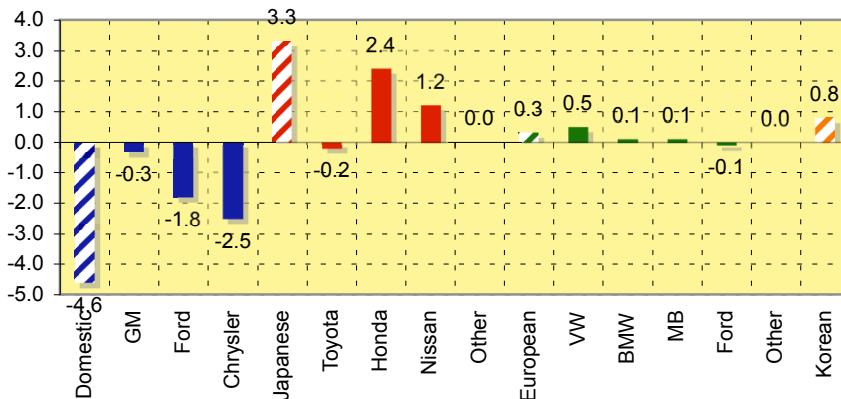
Data thru December, 2008

Saint Louis Area New Retail Car and Light Truck Registrations

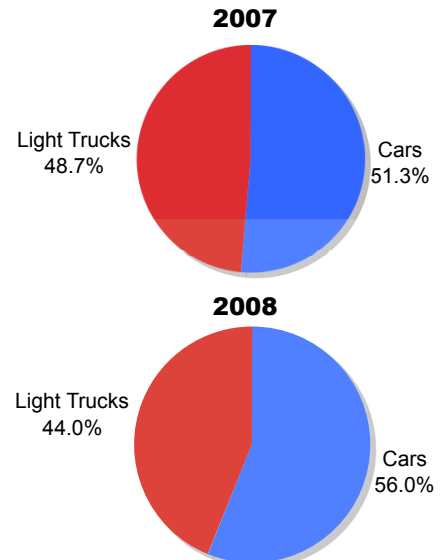
	Nov 08 and Dec 08 Combined			Annual Totals				YTD Market Share (%)		
	St. Louis Area			St. Louis Area			U.S.	St. Louis Area		
	Previous	Current	% chg.	2007	2008	% chg.	% chg.	2007	2008	Chg.
Industry Total	13,023	7,987	-38.7%	93,088	82,331	-11.6%	-18.0%			
Cars	6,523	4,117	-36.9%	47,782	46,145	-3.4%	-10.7%	51.3	56.0	4.7
Light Trucks	6,500	3,870	-40.5%	45,306	36,186	-20.1%	-25.0%	48.7	44.0	-4.7
Domestic Brands	7,117	3,922	-44.9%	50,370	40,759	-19.1%	-23.7%	54.1	49.5	-4.6
General Motors	3,422	1,778	-48.0%	23,139	20,240	-12.5%	-22.6%	24.9	24.6	-0.3
Ford	1,700	1,166	-31.4%	13,143	10,137	-22.9%	-20.1%	14.1	12.3	-1.8
Chrysler	1,995	978	-51.0%	14,088	10,382	-26.3%	-30.0%	15.1	12.6	-2.5
Japanese Brands	4,517	3,058	-32.3%	32,829	31,819	-3.1%	-12.2%	35.3	38.6	3.3
Toyota	1,743	1,097	-37.1%	12,722	11,084	-12.9%	-15.4%	13.7	13.5	-0.2
Honda	1,244	1,000	-19.6%	8,998	9,989	11.0%	-7.9%	9.7	12.1	2.4
Nissan	971	627	-35.4%	6,605	6,822	3.3%	-10.9%	7.1	8.3	1.2
Other	559	334	-40.3%	4,504	3,924	-12.9%	-11.5%	4.8	4.8	0.0
European Brands	853	576	-32.5%	5,818	5,462	-6.1%	-10.7%	6.3	6.6	0.3
Volkswagen	300	240	-20.0%	1,987	2,152	8.3%	-4.1%	2.1	2.6	0.5
BMW	243	174	-28.4%	1,811	1,626	-10.2%	-9.7%	1.9	2.0	0.1
Mercedes	167	93	-44.3%	947	907	-4.2%	-11.2%	1.0	1.1	0.1
Volvo	73	30	-58.9%	598	372	-37.8%	-31.2%	0.6	0.5	-0.1
Other	70	39	-44.3%	475	405	-14.7%	3.8%	0.5	0.5	0.0
Korean Brands	536	431	-19.6%	4,071	4,291	5.4%	-12.6%	4.4	5.2	0.8

Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi, Subaru, and Suzuki). European: VW (Audi, Bentley, and Volkswagen), BMW (BMW, Rolls Royce, and Mini), MB (Mercedes Benz), Ford (Volvo), Other (Aston Martin, Ferrari, Jaguar, Land Rover, Lotus, Maserati, and Saab). Korean: Hyundai and Kia.

Change in Market Share - 2008 vs. 2007



Car and Light Truck Market Share

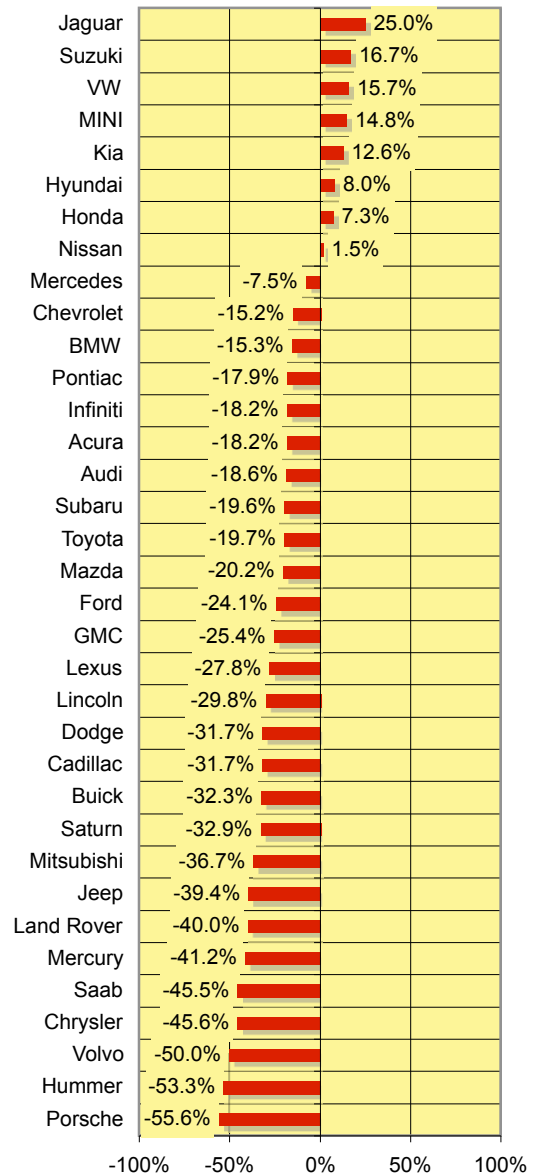


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing delays by governmental agencies.** Source for area registrations: AutoCount, an Experian Company. U.S. sales: Automotive News. Note: some data is estimated for December.

**Area New Retail Car and Light Truck Registrations
(Six Month Average Jul 08 thru Dec 08 vs. Year Earlier)**

	Avg. Monthly Registrations			U.S. % chg.	Area Market Share		
	7/07 to 12/07	7/08 to 12/08	% chg.		Prev.	Recent	Chg.
TOTAL	7,778	6,368	-18.1%	-26.4%			
Acura	110	90	-18.2%	-24.8%	1.4	1.4	0.0
Audi	43	35	-18.6%	-10.6%	0.6	0.5	-0.1
BMW	118	100	-15.3%	-29.4%	1.5	1.6	0.1
Buick	127	86	-32.3%	-30.9%	1.6	1.4	-0.2
Cadillac	101	69	-31.7%	-38.1%	1.3	1.1	-0.2
Chevrolet	1,087	922	-15.2%	-25.5%	14.0	14.5	0.5
Chrysler	318	173	-45.6%	-49.1%	4.1	2.7	-1.4
Dodge	589	402	-31.7%	-32.9%	7.6	6.3	-1.3
Ford	926	703	-24.1%	-27.4%	11.9	11.0	-0.9
GMC	240	179	-25.4%	-31.5%	3.1	2.8	-0.3
Honda	662	710	7.3%	-19.0%	8.5	11.1	2.6
Hummer	15	7	-53.3%	-60.8%	0.2	0.1	-0.1
Hyundai	200	216	8.0%	-25.9%	2.6	3.4	0.8
Infiniti	99	81	-18.2%	-19.2%	1.3	1.3	0.0
Jaguar	4	5	25.0%	-8.9%	0.1	0.1	0.0
Jeep	246	149	-39.4%	-42.0%	3.2	2.3	-0.9
Kia	135	152	12.6%	-23.4%	1.7	2.4	0.7
Land Rover	10	6	-40.0%	-49.9%	0.1	0.1	0.0
Lexus	144	104	-27.8%	-27.0%	1.9	1.6	-0.3
Lincoln	57	40	-29.8%	-13.3%	0.7	0.6	-0.1
Mazda	287	229	-20.2%	-22.7%	3.7	3.6	-0.1
Mercedes	80	74	-7.5%	-21.7%	1.0	1.2	0.2
Mercury	97	57	-41.2%	-34.9%	1.2	0.9	-0.3
MINI	27	31	14.8%	24.6%	0.3	0.5	0.2
Mitsubishi	49	31	-36.7%	-26.0%	0.6	0.5	-0.1
Nissan	476	483	1.5%	-19.5%	6.1	7.6	1.5
Pontiac	190	156	-17.9%	-37.2%	2.4	2.4	0.0
Porsche	9	4	-55.6%	-35.0%	0.1	0.1	0.0
Saab	11	6	-45.5%	-40.8%	0.1	0.1	0.0
Saturn	164	110	-32.9%	-25.0%	2.1	1.7	-0.4
Subaru	46	37	-19.6%	-3.6%	0.6	0.6	0.0
Suzuki	6	7	16.7%	-35.5%	0.1	0.1	0.0
Toyota/Scion	915	735	-19.7%	-23.8%	11.8	11.5	-0.3
Volkswagen	127	147	15.7%	-7.0%	1.6	2.3	0.7
Volvo	48	24	-50.0%	-48.6%	0.6	0.4	-0.2
Other	16	11	-31.3%	68.0%	0.2	0.2	0.0

**Percent Change in Registrations
(Jul 08 thru Dec 08 vs. Year Earlier)**



Explanation and Notes

The table above shows combined new car and light truck registrations for all major brands in the area. Average monthly registrations are shown for the most recent six month period (July 08 thru Dec 08) and the same period a year earlier. The six month average trend provides a clearer picture of brand sales performance than individual monthly registrations, which are subject to significant volatility. The table also shows the percent change in U.S. new vehicle sales during the same time span, and area market share during the most recent six month period. The top ten brands in each percent change category are shaded green. The graph shows the percent change in area registrations during the most recent six month period versus a year earlier (the fourth column in the table). Brands are ranked from highest to lowest percentage change.

This report is sponsored by the Saint Louis Auto Dealers Association and produced by Auto Outlook. For questions or comments, please contact SLADA (314-822-0333) or Auto Outlook (800-206-0102).

**WHO ARE MY TOP COMPETITORS?
-BY MARKET AREA?**

WHAT NEW AND USED CARS SELL WELL IN MY MARKETS?

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