

Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

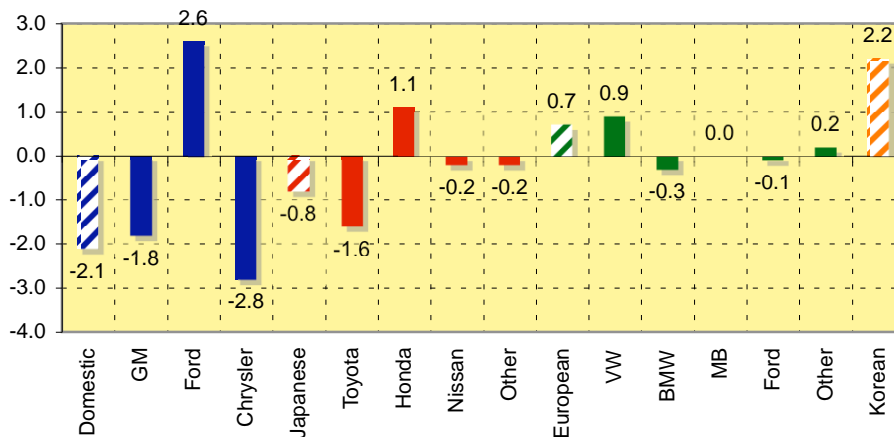
Data thru February, 2009

Saint Louis Area New Retail Car and Light Truck Registrations

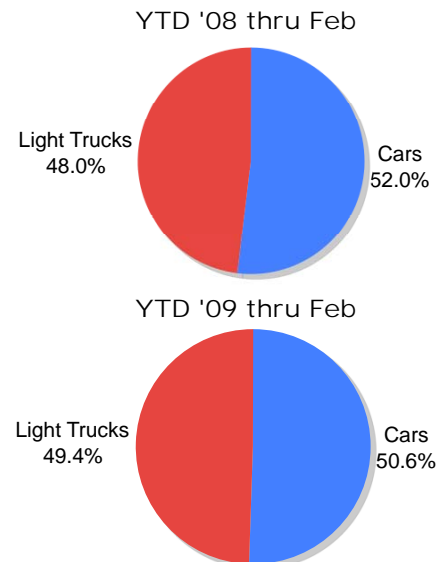
	Jan 09 and Feb 09 Combined			YTD thru Feb				YTD Market Share (%)		
	St. Louis Area			St. Louis Area			U.S.	St. Louis Area		
	Previous	Current	% chg.	2008	2009	% chg.	% chg.	2008	2009	Chg.
Industry Total	14,318	9,719	-32.1%	14,318	9,719	-32.1%	-39.4%			
Cars	7,443	4,916	-34.0%	7,443	4,916	-34.0%	-38.0%	52.0	50.6	-1.4
Light Trucks	6,875	4,803	-30.1%	6,875	4,803	-30.1%	-40.8%	48.0	49.4	1.4
Domestic Brands	7,782	5,085	-34.7%	7,782	5,085	-34.7%	-48.5%	54.4	52.3	-2.1
General Motors	3,991	2,539	-36.4%	3,991	2,539	-36.4%	-51.0%	27.9	26.1	-1.8
Ford	1,695	1,401	-17.3%	1,695	1,401	-17.3%	-44.1%	11.8	14.4	2.6
Chrysler	2,096	1,145	-45.4%	2,096	1,145	-45.4%	-49.1%	14.6	11.8	-2.8
Japanese Brands	5,069	3,361	-33.7%	5,069	3,361	-33.7%	-33.8%	35.4	34.6	-0.8
Toyota	1,905	1,133	-40.5%	1,905	1,133	-40.5%	-35.9%	13.3	11.7	-1.6
Honda	1,513	1,137	-24.9%	1,513	1,137	-24.9%	-33.3%	10.6	11.7	1.1
Nissan	1,025	682	-33.5%	1,025	682	-33.5%	-33.6%	7.2	7.0	-0.2
Other	626	409	-34.7%	626	409	-34.7%	-27.8%	4.4	4.2	-0.2
European Brands	919	686	-25.4%	919	686	-25.4%	-29.7%	6.4	7.1	0.7
Volkswagen	321	306	-4.7%	321	306	-4.7%	-17.8%	2.2	3.1	0.9
BMW	267	154	-42.3%	267	154	-42.3%	-26.8%	1.9	1.6	-0.3
Mercedes	169	113	-33.1%	169	113	-33.1%	-33.1%	1.2	1.2	0.0
Volvo	88	47	-46.6%	88	47	-46.6%	-50.9%	0.6	0.5	-0.1
Other	74	66	-10.8%	74	66	-10.8%	-32.1%	0.5	0.7	0.2
Korean Brands	548	587	7.1%	548	587	7.1%	3.6%	3.8	6.0	2.2

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 - YTD '09 thru Feb vs. Year Earlier



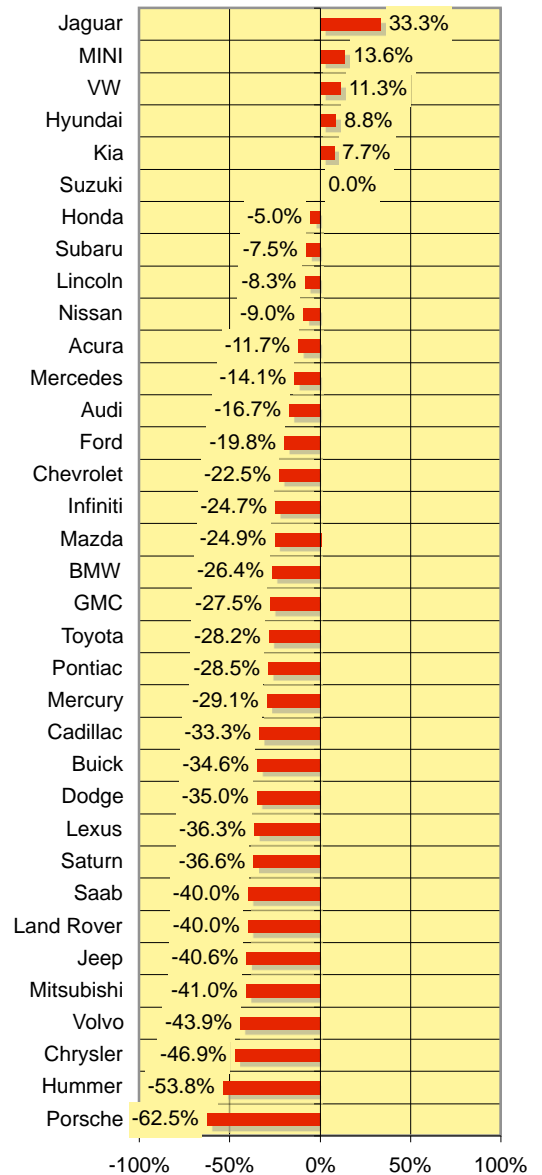
Car and Light Truck Market Share



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 Sep 08 thru Feb 09 vs. Year Earlier)							
	Avg. Monthly Registrations			U.S. % chg.	Area Market Share		
	9/07 to 2/08	9/08 to 2/09	% chg.		Prev.	Recent	Chg.
TOTAL	7,094	5,302	-25.3%	-34.7%			
Acura	111	98	-11.7%	-33.9%	1.6	1.8	0.2
Audi	42	35	-16.7%	-14.7%	0.6	0.7	0.1
BMW	106	78	-26.4%	-30.4%	1.5	1.5	0.0
Buick	127	83	-34.6%	-39.7%	1.8	1.6	-0.2
Cadillac	96	64	-33.3%	-45.5%	1.4	1.2	-0.2
Chevrolet	1,076	834	-22.5%	-35.1%	15.2	15.7	0.5
Chrysler	303	161	-46.9%	-56.3%	4.3	3.0	-1.3
Dodge	535	348	-35.0%	-39.9%	7.5	6.6	-0.9
Ford	791	634	-19.8%	-35.5%	11.2	12.0	0.8
GMC	240	174	-27.5%	-38.1%	3.4	3.3	-0.1
Honda	596	566	-5.0%	-29.8%	8.4	10.7	2.3
Hummer	13	6	-53.8%	-61.3%	0.2	0.1	-0.1
Hyundai	171	186	8.8%	-25.9%	2.4	3.5	1.1
Infiniti	89	67	-24.7%	-28.8%	1.3	1.3	0.0
Jaguar	3	4	33.3%	-27.6%	0.0	0.1	0.1
Jeep	239	142	-40.6%	-41.7%	3.4	2.7	-0.7
Kia	117	126	7.7%	-24.1%	1.6	2.4	0.8
Land Rover	10	6	-40.0%	-43.1%	0.1	0.1	0.0
Lexus	135	86	-36.3%	-34.0%	1.9	1.6	-0.3
Lincoln	48	44	-8.3%	-22.3%	0.7	0.8	0.1
Mazda	241	181	-24.9%	-29.8%	3.4	3.4	0.0
Mercedes	78	67	-14.1%	-31.1%	1.1	1.3	0.2
Mercury	79	56	-29.1%	-41.6%	1.1	1.1	0.0
MINI	22	25	13.6%	11.9%	0.3	0.5	0.2
Mitsubishi	39	23	-41.0%	-34.6%	0.5	0.4	-0.1
Nissan	422	384	-9.0%	-35.8%	5.9	7.2	1.3
Pontiac	179	128	-28.5%	-44.9%	2.5	2.4	-0.1
Porsche	8	3	-62.5%	-37.6%	0.1	0.1	0.0
Saab	10	6	-40.0%	-42.6%	0.1	0.1	0.0
Saturn	145	92	-36.6%	-41.5%	2.0	1.7	-0.3
Subaru	40	37	-7.5%	-6.2%	0.6	0.7	0.1
Suzuki	5	5	0.0%	-50.3%	0.1	0.1	0.0
Toyota/Scion	812	583	-28.2%	-32.8%	11.4	11.0	-0.4
Volkswagen	115	128	11.3%	-13.4%	1.6	2.4	0.8
Volvo	41	23	-43.9%	-52.5%	0.6	0.4	-0.2
Other	12	11	-8.3%	21.0%	0.2	0.2	0.0

Percent Change in Registrations
(Sep 08 thru Feb 09 vs. Year Earlier)



WHO ARE MY TOP COMPETITORS? -BY MARKET AREA?

WHAT NEW AND USED CARS SELL WELL IN MY MARKETS?

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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 (Sep 08 thru Feb 09) 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).