

Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

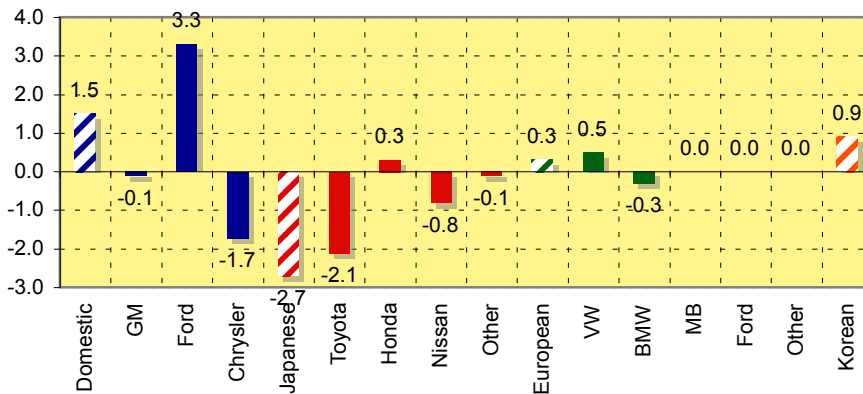
Data thru October, 2009

Saint Louis Area New Retail Car and Light Truck Registrations

	Sep 09 and Oct 09 Combined			YTD thru Oct				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	14,105	13,011	-7.8%	74,344	58,695	-21.0%	-25.4%			
Cars	7,372	7,561	2.6%	41,897	31,859	-24.0%	-23.4%	56.4	54.3	-2.1
Light Trucks	6,733	5,450	-19.1%	32,447	26,836	-17.3%	-27.7%	43.6	45.7	2.1
Domestic Brands	6,971	6,267	-10.1%	36,837	29,919	-18.8%	-30.7%	49.5	51.0	1.5
General Motors	3,705	3,195	-13.8%	18,462	14,474	-21.6%	-33.4%	24.8	24.7	-0.1
Ford	1,682	2,074	23.3%	8,971	9,041	0.8%	-20.3%	12.1	15.4	3.3
Chrysler	1,584	998	-37.0%	9,404	6,404	-31.9%	-38.9%	12.6	10.9	-1.7
Japanese Brands	5,409	5,036	-6.9%	28,761	21,138	-26.5%	-24.3%	38.7	36.0	-2.7
Toyota	1,725	1,606	-6.9%	9,987	6,643	-33.5%	-25.5%	13.4	11.3	-2.1
Honda	1,715	1,689	-1.5%	8,989	7,297	-18.8%	-23.4%	12.1	12.4	0.3
Nissan	1,314	1,086	-17.4%	6,195	4,429	-28.5%	-24.0%	8.3	7.5	-0.8
Other	655	655	0.0%	3,590	2,769	-22.9%	-22.2%	4.8	4.7	-0.1
European Brands	952	902	-5.3%	4,886	4,042	-17.3%	-19.2%	6.6	6.9	0.3
Volkswagen	384	406	5.7%	1,912	1,811	-5.3%	-7.9%	2.6	3.1	0.5
BMW	274	235	-14.2%	1,452	1,019	-29.8%	-23.5%	2.0	1.7	-0.3
Mercedes	195	148	-24.1%	869	704	-19.0%	-21.6%	1.2	1.2	0.0
Volvo	49	70	42.9%	342	281	-17.8%	-20.4%	0.5	0.5	0.0
Other	50	43	-14.0%	311	227	-27.0%	-43.2%	0.4	0.4	0.0
Korean Brands	773	806	4.3%	3,860	3,596	-6.8%	5.4%	5.2	6.1	0.9

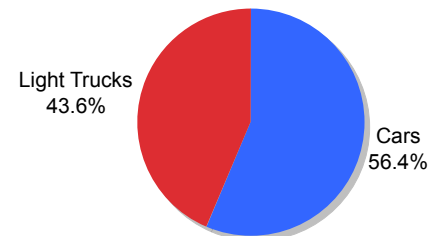
Brands included above: Big 3: GM (Buick, Cadillac, Chevrolet, GMC, Hummer, Pontiac, and Saturn), Ford (Ford, Lincoln, and Mercury), Chrysler (Chrysler, Dodge, and Jeep). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Isuzu, Mazda, Mitsubishi, 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 Oct vs. Year Earlier

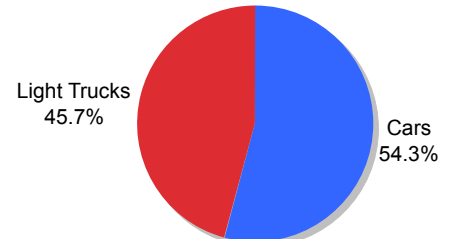


Car and Light Truck Market Share

YTD '08 thru Oct



YTD '09 thru Oct

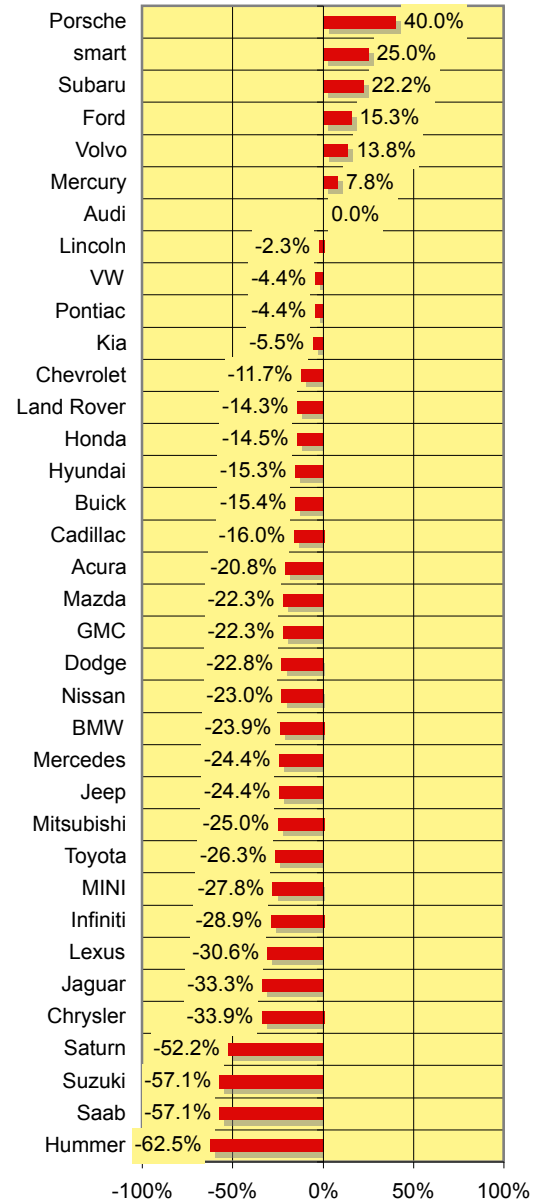


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing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

**Area New Retail Car and Light Truck Registrations
(Six Month Average May 09 thru Oct 09 vs. Year Earlier)**

	Avg. Monthly Registrations			U.S. % chg.	Area Market Share		
	5/08 to 10/08	5/09 to 10/09	% chg.		Prev.	Recent	Chg.
TOTAL	7,618	6,461	-15.2%	-16.9%			
Acura	101	80	-20.8%	-29.6%	1.3	1.2	-0.1
Audi	44	44	0.0%	-2.0%	0.6	0.7	0.1
BMW	113	86	-23.9%	-21.8%	1.5	1.3	-0.2
Buick	104	88	-15.4%	-26.0%	1.4	1.4	0.0
Cadillac	75	63	-16.0%	-32.7%	1.0	1.0	0.0
Chevrolet	1,114	984	-11.7%	-19.7%	14.6	15.2	0.6
Chrysler	218	144	-33.9%	-41.5%	2.9	2.2	-0.7
Dodge	482	372	-22.8%	-31.7%	6.3	5.8	-0.5
Ford	805	928	15.3%	-3.1%	10.6	14.4	3.8
GMC	202	157	-22.3%	-29.5%	2.7	2.4	-0.3
Honda	863	738	-14.5%	-16.9%	11.3	11.4	0.1
Hummer	8	3	-62.5%	-61.4%	0.1	0.0	-0.1
Hyundai	249	211	-15.3%	8.7%	3.3	3.3	0.0
Infiniti	90	64	-28.9%	-26.0%	1.2	1.0	-0.2
Jaguar	6	4	-33.3%	-28.1%	0.1	0.1	0.0
Jeep	197	149	-24.4%	-25.2%	2.6	2.3	-0.3
Kia	183	173	-5.5%	14.6%	2.4	2.7	0.3
Land Rover	7	6	-14.3%	-9.1%	0.1	0.1	0.0
Lexus	121	84	-30.6%	-13.8%	1.6	1.3	-0.3
Lincoln	44	43	-2.3%	-20.3%	0.6	0.7	0.1
Mazda	283	220	-22.3%	-19.2%	3.7	3.4	-0.3
Mercedes	86	65	-24.4%	-13.6%	1.1	1.0	-0.1
Mercury	64	69	7.8%	-13.3%	0.8	1.1	0.3
MINI	36	26	-27.8%	-11.0%	0.5	0.4	-0.1
Mitsubishi	40	30	-25.0%	-43.9%	0.5	0.5	0.0
Nissan	578	445	-23.0%	-14.5%	7.6	6.9	-0.7
Pontiac	205	196	-4.4%	-22.2%	2.7	3.0	0.3
Porsche	5	7	40.0%	-28.7%	0.1	0.1	0.0
Saab	7	3	-57.1%	-68.0%	0.1	0.0	-0.1
Saturn	138	66	-52.2%	-64.1%	1.8	1.0	-0.8
smart	8	10	25.0%	-45.1%	0.1	0.2	0.1
Subaru	45	55	22.2%	20.5%	0.6	0.9	0.3
Suzuki	7	3	-57.1%	-58.0%	0.1	0.0	-0.1
Toyota/Scion	893	658	-26.3%	-17.1%	11.7	10.2	-1.5
Volkswagen	160	153	-4.4%	-2.4%	2.1	2.4	0.3
Volvo	29	33	13.8%	7.0%	0.4	0.5	0.1
Other	8	4	-50.0%	-52.3%	0.1	0.1	0.0

**Percent Change in Registrations
(May 09 thru Oct 09 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 (May 09 thru Oct 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).

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

WHAT NEW AND USED CARS SELL WELL IN MY MARKETS?

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