

# Saint Louis Auto Outlook



Covering the Saint Louis Area Automotive Market

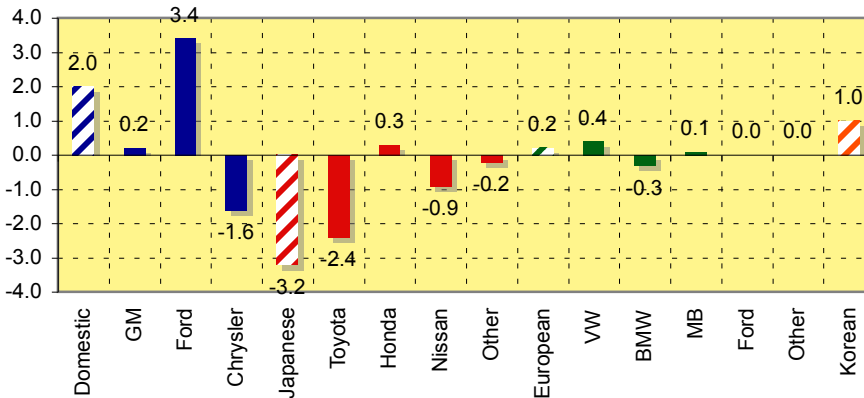
Data thru September, 2009

## Saint Louis Area New Retail Car and Light Truck Registrations

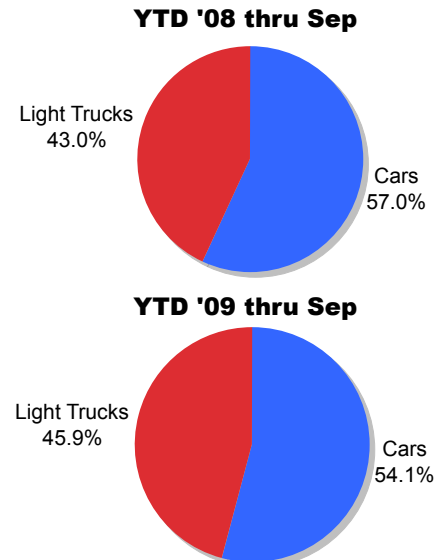
	Aug 09 and Sep 09 Combined			YTD thru Sept				YTD Market Share (%)		
	St. Louis Area			St. Louis Area			U.S.	St. Louis Area		
	Previous	Current	% chg.	2008	2009	% chg.	% chg.	2008	2009	Chg.
Industry Total	15,369	14,728	-4.2%	67,138	53,457	-20.4%	-27.4%			
Cars	8,847	8,627	-2.5%	38,247	28,938	-24.3%	-25.2%	57.0	54.1	-2.9
Light Trucks	6,522	6,101	-6.5%	28,891	24,519	-15.1%	-29.9%	43.0	45.9	2.9
Domestic Brands	7,048	7,540	7.0%	33,157	27,493	-17.1%	-32.8%	49.4	51.4	2.0
General Motors	3,535	3,692	4.4%	16,472	13,230	-19.7%	-36.1%	24.5	24.7	0.2
Ford	1,855	2,457	32.5%	8,113	8,268	1.9%	-22.3%	12.1	15.5	3.4
Chrysler	1,658	1,391	-16.1%	8,572	5,995	-30.1%	-39.5%	12.8	11.2	-1.6
Japanese Brands	6,298	5,366	-14.8%	26,077	19,035	-27.0%	-26.2%	38.8	35.6	-3.2
Toyota	2,048	1,788	-12.7%	9,136	6,000	-34.3%	-27.7%	13.6	11.2	-2.4
Honda	1,926	1,772	-8.0%	8,074	6,592	-18.4%	-25.1%	12.0	12.3	0.3
Nissan	1,519	1,084	-28.6%	5,581	3,934	-29.5%	-26.1%	8.3	7.4	-0.9
Other	805	722	-10.3%	3,286	2,509	-23.6%	-23.7%	4.9	4.7	-0.2
European Brands	1,065	903	-15.2%	4,399	3,625	-17.6%	-20.7%	6.6	6.8	0.2
Volkswagen	430	414	-3.7%	1,717	1,627	-5.2%	-9.1%	2.6	3.0	0.4
BMW	343	231	-32.7%	1,324	914	-31.0%	-23.9%	2.0	1.7	-0.3
Mercedes	183	144	-21.3%	764	635	-16.9%	-24.4%	1.1	1.2	0.1
Volvo	60	75	25.0%	315	249	-21.0%	-22.8%	0.5	0.5	0.0
Other	49	39	-20.4%	279	200	-28.3%	-43.6%	0.4	0.4	0.0
Korean Brands	958	919	-4.1%	3,505	3,304	-5.7%	2.7%	5.2	6.2	1.0

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 Sep vs. Year Earlier



Car and Light Truck Market Share

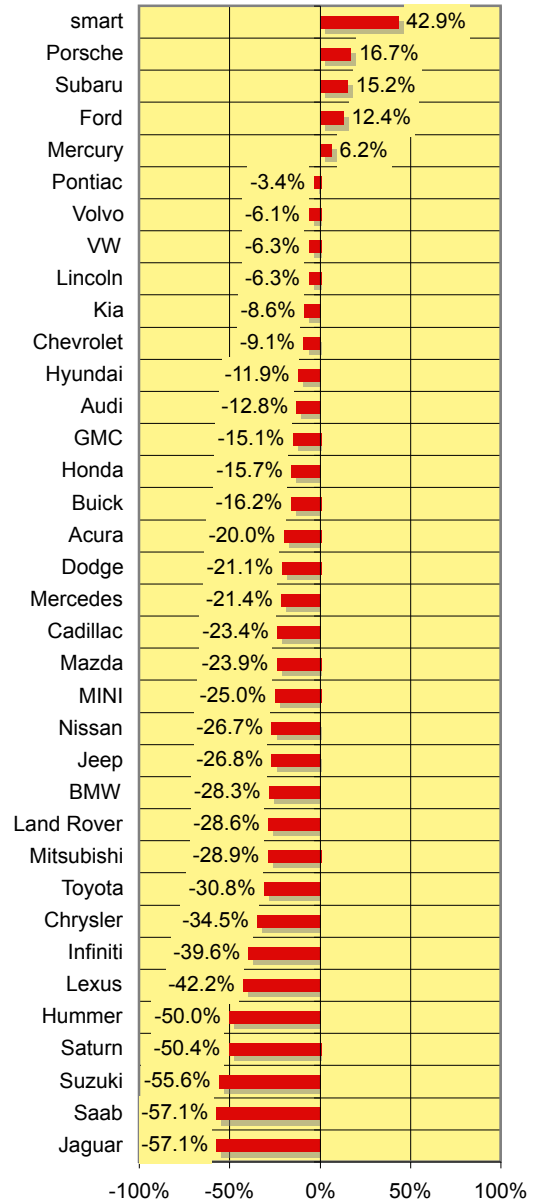


The table above shows new retail light vehicle registrations in the Greater Saint Louis, seven county area. **Please keep in mind that monthly registration figures can occasionally be subject to fluctuations, resulting in over or under estimation of actual results. This usually occurs due to processing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

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

	Avg. Monthly Registrations			U.S. % chg.	Area Market Share		
	4/08 to 9/08	4/09 to 9/09	% chg.		Prev.	Recent	Chg.
TOTAL	7,712	6,432	-16.6%	-21.9%			
Acura	95	76	-20.0%	-33.4%	1.2	1.2	0.0
Audi	47	41	-12.8%	-3.4%	0.6	0.6	0.0
BMW	120	86	-28.3%	-26.1%	1.6	1.3	-0.3
Buick	105	88	-16.2%	-31.1%	1.4	1.4	0.0
Cadillac	77	59	-23.4%	-40.6%	1.0	0.9	-0.1
Chevrolet	1,088	989	-9.1%	-23.9%	14.1	15.4	1.3
Chrysler	229	150	-34.5%	-44.8%	3.0	2.3	-0.7
Dodge	488	385	-21.1%	-35.8%	6.3	6.0	-0.3
Ford	820	922	12.4%	-9.1%	10.6	14.3	3.7
GMC	185	157	-15.1%	-35.6%	2.4	2.4	0.0
Honda	869	733	-15.7%	-19.8%	11.3	11.4	0.1
Hummer	8	4	-50.0%	-59.7%	0.1	0.1	0.0
Hyundai	252	222	-11.9%	1.7%	3.3	3.5	0.2
Infiniti	96	58	-39.6%	-31.8%	1.2	0.9	-0.3
Jaguar	7	3	-57.1%	-32.8%	0.1	0.0	-0.1
Jeep	213	156	-26.8%	-27.1%	2.8	2.4	-0.4
Kia	185	169	-8.6%	6.1%	2.4	2.6	0.2
Land Rover	7	5	-28.6%	-12.1%	0.1	0.1	0.0
Lexus	128	74	-42.2%	-22.1%	1.7	1.2	-0.5
Lincoln	48	45	-6.3%	-26.0%	0.6	0.7	0.1
Mazda	289	220	-23.9%	-22.7%	3.7	3.4	-0.3
Mercedes	84	66	-21.4%	-20.5%	1.1	1.0	-0.1
Mercury	65	69	6.2%	-20.3%	0.8	1.1	0.3
MINI	36	27	-25.0%	-11.1%	0.5	0.4	-0.1
Mitsubishi	45	32	-28.9%	-45.3%	0.6	0.5	-0.1
Nissan	577	423	-26.7%	-20.1%	7.5	6.6	-0.9
Pontiac	208	201	-3.4%	-27.7%	2.7	3.1	0.4
Porsche	6	7	16.7%	-34.4%	0.1	0.1	0.0
Saab	7	3	-57.1%	-63.3%	0.1	0.0	-0.1
Saturn	137	68	-50.4%	-63.4%	1.8	1.1	-0.7
smart	7	10	42.9%	-41.6%	0.1	0.2	0.1
Subaru	46	53	15.2%	13.6%	0.6	0.8	0.2
Suzuki	9	4	-55.6%	-61.7%	0.1	0.1	0.0
Toyota/Scion	931	644	-30.8%	-23.5%	12.1	10.0	-2.1
Volkswagen	160	150	-6.3%	-5.7%	2.1	2.3	0.2
Volvo	33	31	-6.1%	-3.2%	0.4	0.5	0.1
Other	11	4	-63.6%	-53.4%	0.1	0.1	0.0

**Percent Change in Registrations  
(Apr 09 thru Sep 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 (Apr 09 thru Sep 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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