

# San Diego Outlook

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San Diego County

Covering the San Diego County automotive market

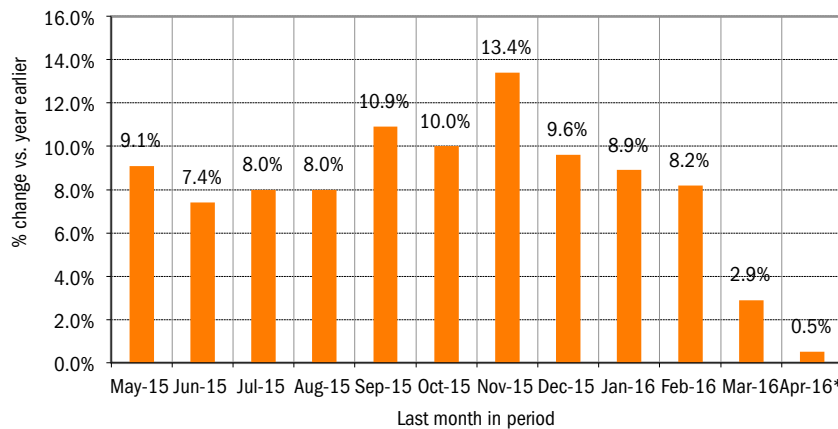
Data thru April 2016

## San Diego County New Retail Car and Light Truck Registrations

	Most Recent Two Months			YTD thru April			YTD Market Share		
	3/15 & 4/15	3/16 & 4/16*	% change	2015	2016	% change	2015	2016	change
	Industry Total	27,158	25,979	-4.3%	50,276	51,376	2.2%		
Cars	15,654	13,856	-11.5%	28,875	27,680	-4.1%	57.4	53.9	-3.5
Light Trucks	11,504	12,123	5.4%	21,401	23,696	10.7%	42.6	46.1	3.5
Japanese Brands	13,793	13,746	-0.3%	25,859	26,981	4.3%	51.4	52.5	1.1
Toyota	5,787	5,512	-4.8%	11,020	11,024	0.0%	21.9	21.5	-0.4
Honda	3,246	3,623	11.6%	6,090	6,794	11.6%	12.1	13.2	1.1
Nissan	2,679	2,686	0.3%	4,981	5,424	8.9%	9.9	10.6	0.7
Other	2,081	1,925	-7.5%	3,768	3,739	-0.8%	7.5	7.3	-0.2
Domestic Brands	6,959	6,651	-4.4%	12,800	13,570	6.0%	25.5	26.4	0.9
General Motors	2,024	1,976	-2.4%	3,615	4,081	12.9%	7.2	7.9	0.7
Ford	2,913	2,800	-3.9%	5,516	5,678	2.9%	11.0	11.1	0.1
Chrysler	1,892	1,720	-9.1%	3,414	3,491	2.3%	6.8	6.8	0.0
Other	130	155	19.2%	255	320	25.5%	0.5	0.6	0.1
European Brands	4,259	3,712	-12.8%	7,769	7,151	-8.0%	15.5	13.9	-1.6
Volkswagen	1,422	1,245	-12.4%	2,682	2,342	-12.7%	5.3	4.6	-0.7
BMW	1,200	1,024	-14.7%	2,194	1,989	-9.3%	4.4	3.9	-0.5
Mercedes	982	850	-13.4%	1,751	1,673	-4.5%	3.5	3.3	-0.2
Other	655	593	-9.5%	1,142	1,147	0.4%	2.3	2.2	-0.1
Korean Brands	2,147	1,870	-12.9%	3,848	3,674	-4.5%	7.7	7.2	-0.5

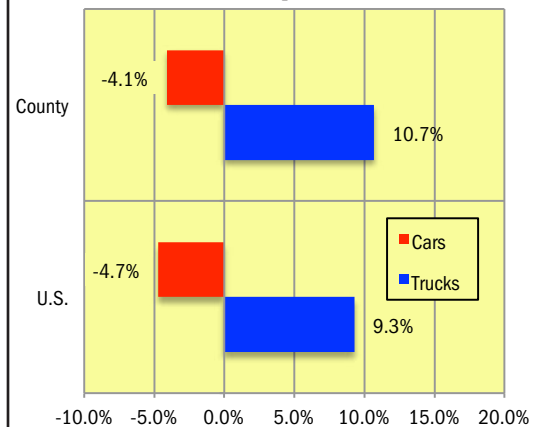
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (Audi, Bentley, Porsche, and Volkswagen), BMW (BMW, Rolls Royce, and MINI), MB (Mercedes Benz and smart), Other (Alfa Romeo, Aston Martin, Ferrari, Fiat, Jaguar, Land Rover, Lotus, Maserati, and Volvo). Korean: Hyundai and Kia.  
\*Figures for April 2016 were estimated by Auto Outlook. Data Source: IHS Automotive.

### Percent Change in Three Month Moving Average of New Retail Registrations versus Same Period Year Earlier



The graph above provides a clear picture of the trending direction of the county market. It shows the year-over-year percent change in the three month moving average of new retail light vehicle registrations. The three month moving average is less erratic than monthly registrations, which can fluctuate due to such factors as the timing of manufacturer incentive programs, weather and title processing delays by governmental agencies.  
\*Figures for April 2016 were estimated by Auto Outlook. Data Source: IHS Automotive.

### Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '16 thru April\* vs. YTD 15



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. \*Figures for April 2016 were estimated by Auto Outlook.  
Data Source: IHS Automotive.

### Data Information

All data represents new vehicle retail registrations in San Diego County and excludes fleet and wholesale transactions. 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. For this reason, the year-to-date figures will typically be more reflective of market results.

Data Source: IHS Automotive.

San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '15	YTD '16	% change	YTD '15	YTD '16
	thru Apr.	thru Apr.*		thru Apr.	thru Apr.*
TOTAL	50,276	51,376	2%		
Acura	684	676	-1%	1.4%	1.3%
Audi	813	807	-1%	1.6%	1.6%
BMW	1,847	1,715	-7%	3.7%	3.3%
Buick	191	225	18%	0.4%	0.4%
Cadillac	324	263	-19%	0.6%	0.5%
Chevrolet	2,473	2,895	17%	4.9%	5.6%
Chrysler	369	225	-39%	0.7%	0.4%
Dodge	803	696	-13%	1.6%	1.4%
FIAT	380	227	-40%	0.8%	0.4%
Ford	5,290	5,423	3%	10.5%	10.6%
GMC	627	698	11%	1.2%	1.4%
Honda	5,406	6,118	13%	10.8%	11.9%
Hyundai	1,805	1,650	-9%	3.6%	3.2%
Infiniti	443	421	-5%	0.9%	0.8%
Jaguar	67	74	10%	0.1%	0.1%
Jeep	1,656	1,823	10%	3.3%	3.5%
Kia	2,043	2,024	-1%	4.1%	3.9%
Land Rover	391	479	23%	0.8%	0.9%
Lexus	1,874	1,692	-10%	3.7%	3.3%
Lincoln	226	255	13%	0.4%	0.5%
Mazda	1,691	1,610	-5%	3.4%	3.1%
Mercedes	1,689	1,636	-3%	3.4%	3.2%
MINI	342	271	-21%	0.7%	0.5%
Mitsubishi	236	250	6%	0.5%	0.5%
Nissan	4,538	5,003	10%	9.0%	9.7%
Other	206	144	-30%	0.4%	0.3%
Porsche	335	298	-11%	0.7%	0.6%
Ram	586	747	27%	1.2%	1.5%
Subaru	1,834	1,877	2%	3.6%	3.7%
Tesla	246	314	28%	0.5%	0.6%
Toyota	9,146	9,332	2%	18.2%	18.2%
Volkswagen	1,534	1,237	-19%	3.1%	2.4%
Volvo	181	271	50%	0.4%	0.5%

Data source: IHS Automotive.

Top ten ranked brands in each percent change category are shaded green.

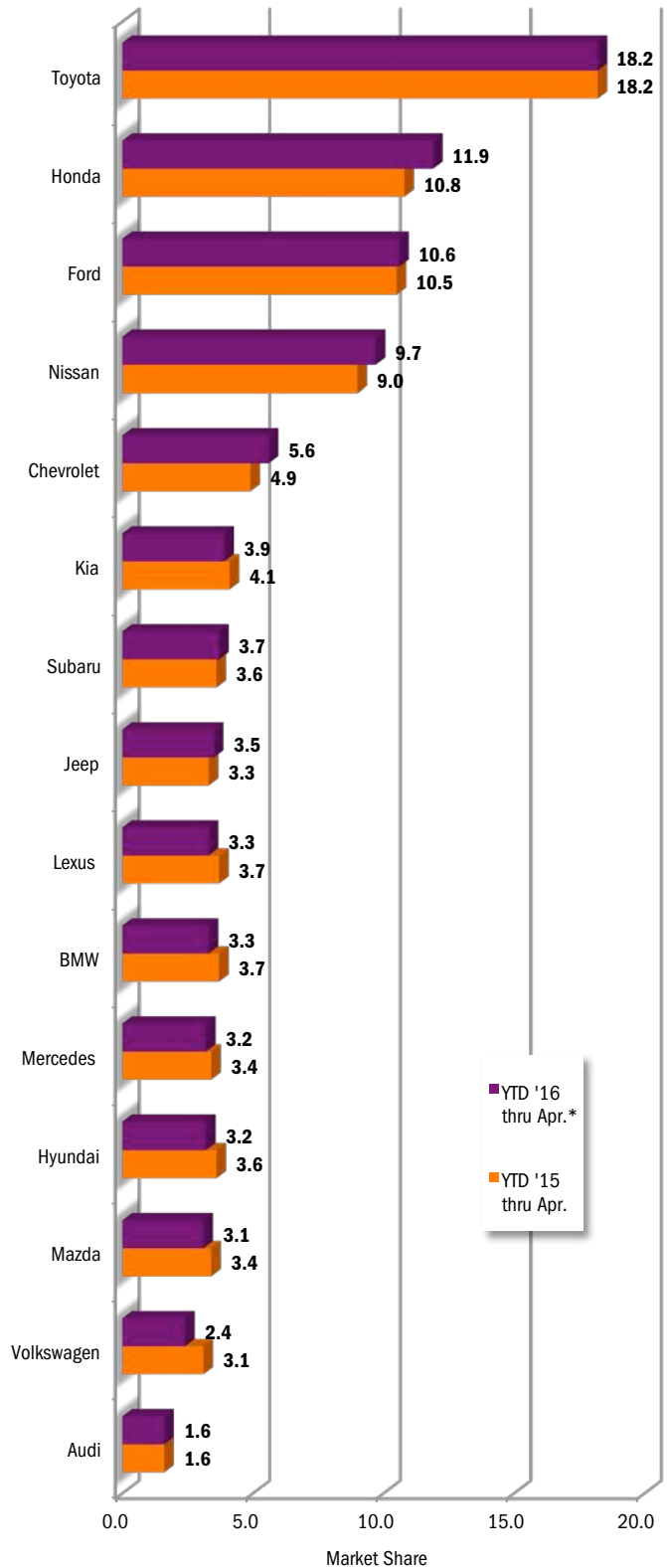
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County Market Share for Top 15 Selling Brands  
YTD '16 thru April\* vs. YTD 15



Data source: IHS Automotive.

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