

# San Diego Outlook

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Covering the San Diego County automotive market

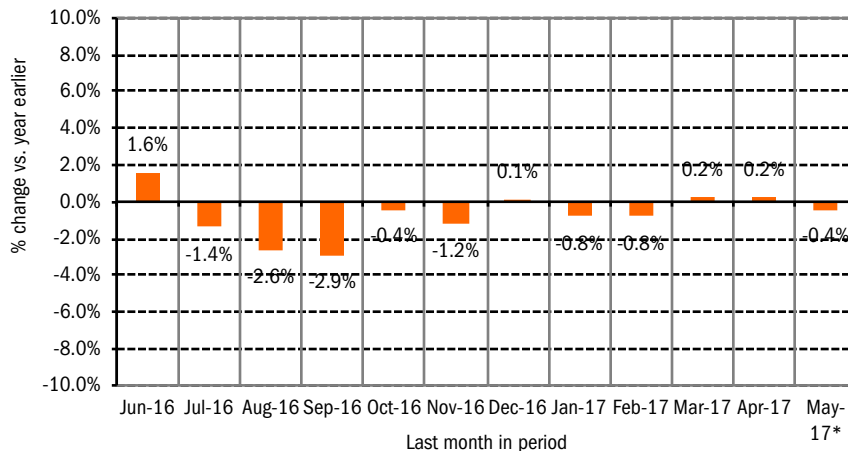
Data thru May 2017

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

	Most Recent Two Months			Year to date thru May			YTD Market Share		
	4/16 & 5/16	4/17 & 5/17*	% change	YTD '16	YTD '17	% change	YTD '16	YTD '17	change
Industry Total	27,925	26,744	-4.2%	66,250	65,153	-1.7%			
Cars	14,267	12,650	-11.3%	34,673	30,647	-11.6%	52.3	47.0	-5.3
Light Trucks	13,658	14,094	3.2%	31,577	34,506	9.3%	47.7	53.0	5.3
Japanese Brands	14,248	14,006	-1.7%	34,357	33,093	-3.7%	51.9	50.8	-1.1
Honda	3,845	3,657	-4.9%	8,818	8,710	-1.2%	13.3	13.4	0.1
Nissan	2,655	2,644	-0.4%	6,791	6,069	-10.6%	10.3	9.3	-1.0
Toyota	5,773	5,718	-1.0%	14,015	13,318	-5.0%	21.2	20.4	-0.8
Other	1,975	1,987	0.6%	4,733	4,996	5.6%	7.1	7.7	0.6
Domestic Brands	7,594	7,036	-7.3%	17,714	17,692	-0.1%	26.7	27.2	0.5
FCA (excl. FIAT)	1,934	1,757	-9.2%	4,503	4,392	-2.5%	6.8	6.7	-0.1
Ford	3,072	2,867	-6.7%	7,265	7,086	-2.5%	11.0	10.9	-0.1
General Motors	2,307	2,161	-6.3%	5,428	5,591	3.0%	8.2	8.6	0.4
Other	281	251	-10.7%	518	623	20.3%	0.8	1.0	0.2
European Brands	3,996	3,799	-4.9%	9,355	9,509	1.6%	14.1	14.6	0.5
BMW	1,128	921	-18.4%	2,728	2,361	-13.5%	4.1	3.6	-0.5
Mercedes	892	820	-8.1%	2,081	2,021	-2.9%	3.1	3.1	0.0
Volkswagen	1,430	1,406	-1.7%	3,135	3,425	9.3%	4.7	5.3	0.6
Other	546	652	19.4%	1,411	1,702	20.6%	2.1	2.6	0.5
Korean Brands	2,087	1,903	-8.8%	4,824	4,859	0.7%	7.3	7.5	0.2

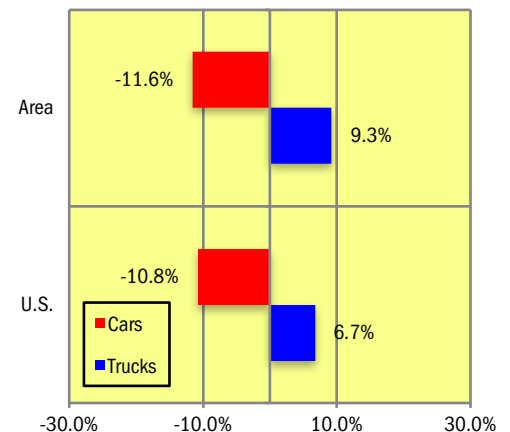
Brands included above: Domestic Brands: GM (Buick, Cadillac, Chevrolet, and GMC), Ford (Ford and Lincoln), Chrysler (Chrysler, Dodge, Jeep, and Ram). Japanese: Toyota (Toyota, Lexus, and Scion), Honda (Honda and Acura), Nissan (Nissan and Infiniti), Other (Mazda, Mitsubishi, and Subaru). European: VW (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 May 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

**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 May 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

**Percent Change in County and U.S. New Retail Light Vehicle Markets YTD '17 thru May\* vs. YTD '16**



The graph above compares the change in new retail car and light truck registrations in both the county and U.S. markets. \*Figures for May, 2017 were estimated by Auto Outlook. Data Source: IHS Markit.

### 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 Markit.

San Diego County New Retail Light Vehicle Registrations					
	Registrations			Market share	
	YTD '16	YTD '17	% change	YTD '16	YTD '17
	thru May	thru May*		thru May	thru May*
TOTAL	66,250	65,153	-2%		
Acura	820	715	-13%	1.2%	1.1%
Alfa Romeo	5	50	900%	0.0%	0.1%
Audi	1,110	1,205	9%	1.7%	1.8%
BMW	2,357	2,032	-14%	3.6%	3.1%
Buick	292	295	1%	0.4%	0.5%
Cadillac	378	383	1%	0.6%	0.6%
Chevrolet	3,860	4,038	5%	5.8%	6.2%
Chrysler	261	286	10%	0.4%	0.4%
Dodge	889	855	-4%	1.3%	1.3%
FIAT	276	427	55%	0.4%	0.7%
Ford	6,964	6,800	-2%	10.5%	10.4%
Genesis	0	78		0.0%	0.1%
GMC	898	875	-3%	1.4%	1.3%
Honda	7,998	7,995	0%	12.1%	12.3%
Hyundai	2,204	2,201	0%	3.3%	3.4%
Infiniti	464	677	46%	0.7%	1.0%
Jaguar	104	223	114%	0.2%	0.3%
Jeep	2,355	2,268	-4%	3.6%	3.5%
Kia	2,620	2,580	-2%	4.0%	4.0%
Land Rover	563	497	-12%	0.8%	0.8%
Lexus	2,151	1,921	-11%	3.2%	2.9%
Lincoln	301	286	-5%	0.5%	0.4%
Maserati	57	113	98%	0.1%	0.2%
Mazda	2,042	2,163	6%	3.1%	3.3%
Mercedes	1,993	1,993	0%	3.0%	3.1%
MINI	362	324	-10%	0.5%	0.5%
Mitsubishi	288	251	-13%	0.4%	0.4%
Nissan	6,327	5,392	-15%	9.6%	8.3%
Other	167	148	-11%	0.3%	0.2%
Porsche	409	415	1%	0.6%	0.6%
Ram	998	983	-2%	1.5%	1.5%
Subaru	2,400	2,573	7%	3.6%	3.9%
Tesla	508	618	22%	0.8%	0.9%
Toyota	11,864	11,397	-4%	17.9%	17.5%
Volkswagen	1,616	1,805	12%	2.4%	2.8%
Volvo	349	291	-17%	0.5%	0.4%

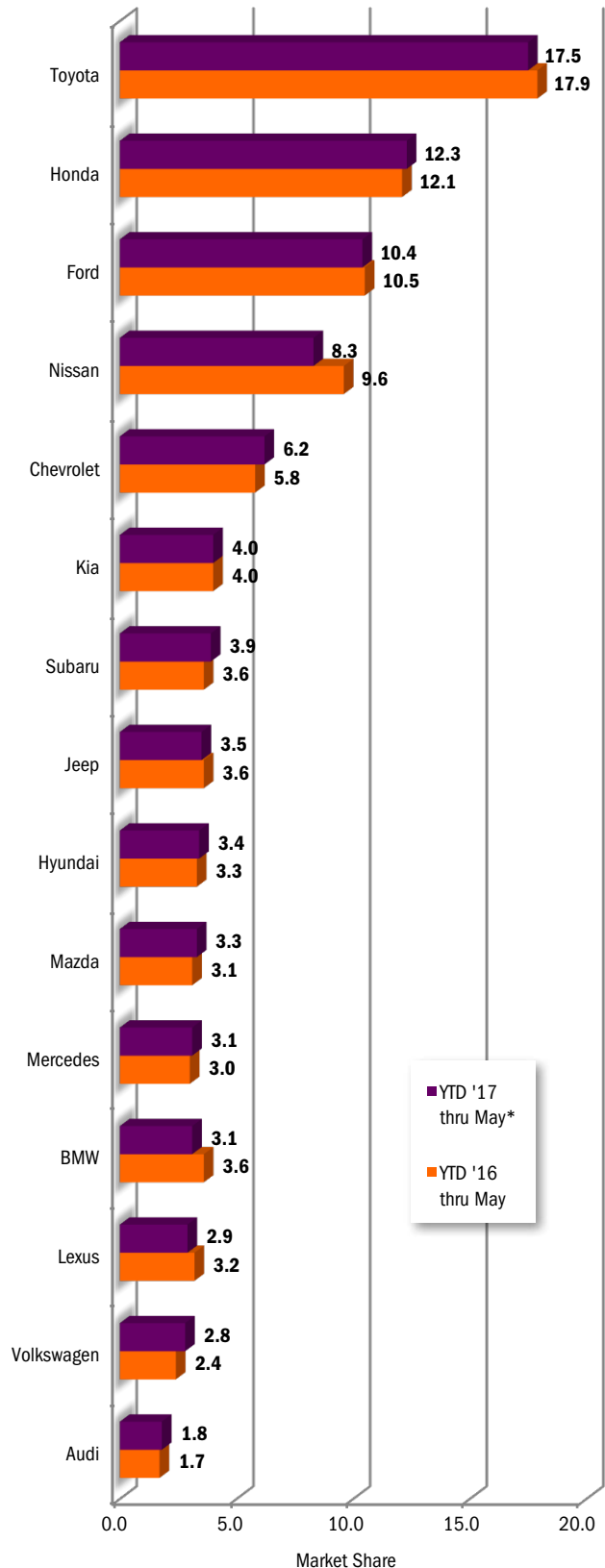
Top ten ranked brands in each percent change category are shaded green.  
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Data Source: IHS Markit.

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County Market Share for Top 15 Selling Brands  
YTD '17 thru May\* vs. YTD '16



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