



San Antonio Automotive Update August 2014 CYTD

Hispanics Offer A **Significant Opportunity** For San Antonio's Auto Industry

San Antonio Hispanic Sales CYTD
Jan 2014 - August 2014



ü 36,888

New Vehicles Purchased

ü 44%

of Units Sold

ü +15%

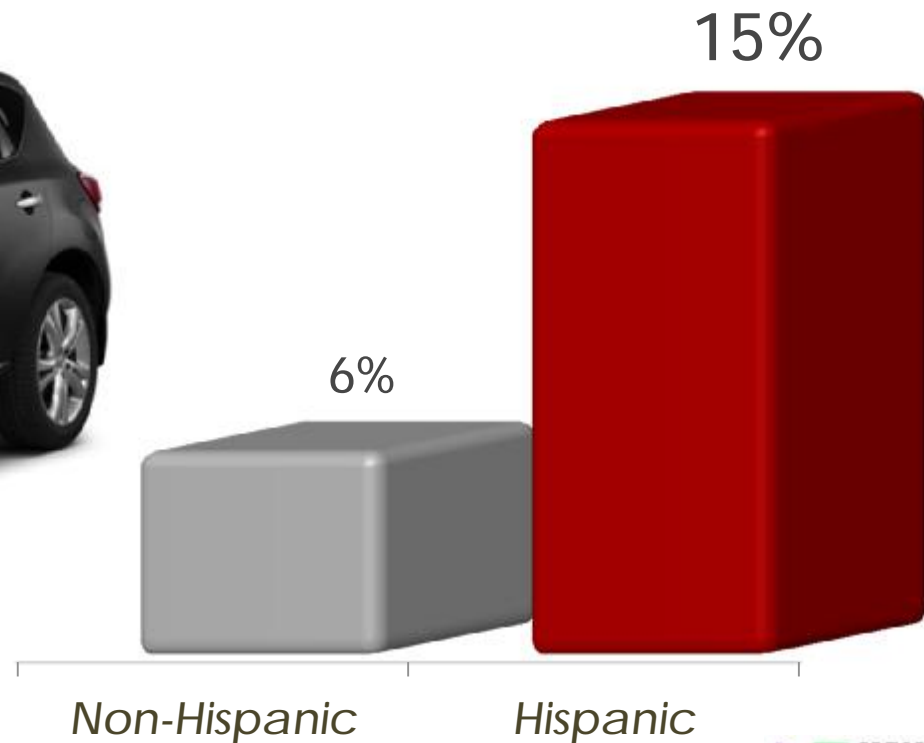
in Sales Growth vs. *August 2013*

Source: Polk, New Vehicle Registrations (Includes Leases) Enhanced Ethnic Data, August 2014 CYTD, (San Antonio)



Hispanic Consumers are **Out-Pacing Non-Hispanic** New Auto Sales in San Antonio

San Antonio Growth Comparison
August 2014 vs. August 2013 CYTD













Source: Polk, New Vehicle Registrations (Includes Leases) Enhanced Ethnic Data, August 2014 CYTD, (San Antonio)



Top Ten Automotive Brands Among San Antonio Hispanics

Share of Hispanic Market Sales











AUGUST14 CYTD Rank	Brand	Hispanics 2013	Hispanics 2014	Change +/-
#1		16.6%	17.4%	↑
#2		15.1%	14.6%	↓
#3		11.0%	10.0%	↓
#4		8.5%	9.2%	↑
#5		9.2%	9.2%	→
#6		6.5%	6.1%	↓
#7		3.2%	4.7%	↑
#8		4.6%	3.8%	↓
#9		2.2%	3.4%	↑
#10		2.7%	3.1%	↑



Source: Polk, New Vehicle Registrations (Includes Leases) Enhanced Ethnic Data, August 2014 CYTD, (San Antonio)

Nissan Ranks 4th in new vehicle sales among San Antonio Hispanics

% of Brand Sales to Hispanics

August14 CYTD Rank		2013	2014	Change +/-
#1		43.8%	46.9%	↑
#2		38.8%	40.5%	↑
#3		44.2%	45.4%	↑
#4		47.6%	49.2%	↑
#5		56.8%	62.6%	↑
#6		36.3%	38.4%	↑
#7		59.4%	64.3%	↑
#8		49.6%	51.2%	↑
#9		34.7%	39.6%	↑
#10		45.4%	39.6%	↓

9 of the top 10 Brands increased their share of sales to Hispanic consumers!



Source: Polk, New Vehicle Registrations (Includes Leases) Enhanced Ethnic Data, August 2014 CYTD, (San Antonio)



Top Ten Brands – Hispanic vs Non-Hispanic

Non-Hispanic

AUG14 CYTD Rank	Brand	Share of Non-Hispanic Sales
#1	Ford	16.5%
#2	Toyota	15.2%
#3	Chevrolet	9.3%
#4	Honda	7.5%
#5	Nissan	7.3%
#6	Dodge	4.2%
#7	Jeep	4.0%
#8	Ram	3.6%
#9	GMC	3.2%
#10	Kia	2.8%

Hispanic

AUG14 CYTD Rank	Brand	Share of Hispanic Sales
#1	Toyota	17.4%
#2	Ford	14.6%
#3	Chevrolet	10.0%
#4	Nissan	9.2%
#5	Dodge	9.1%
#6	Honda	6.1%
#7	Mitsubishi	4.7%
#8	Kia	3.8%
#9	Jeep	3.4%
#10	Ram	3.1%

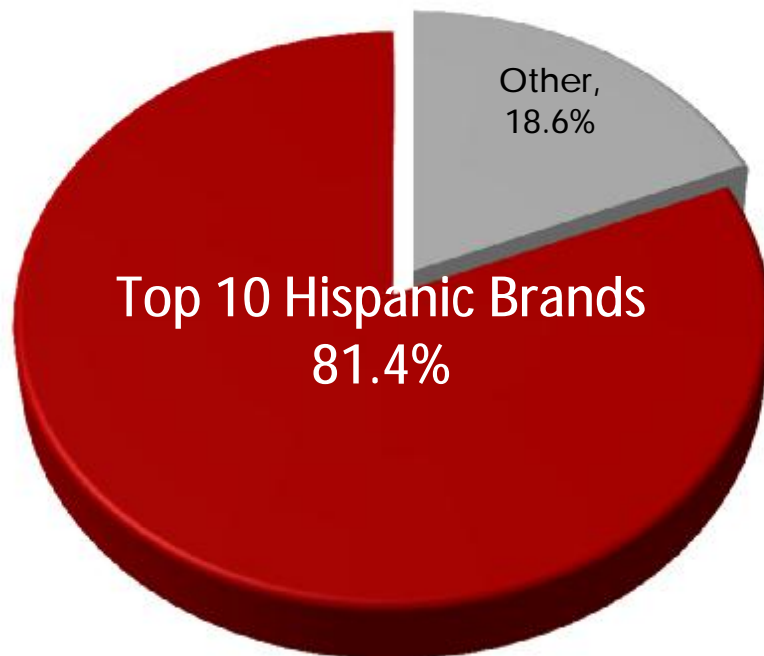
Ranked #4 among San Antonio Hispanics, Nissan's rank drops down to 5th place among non-Hispanics.



The Top 10 Hispanic Brands account for 81.4% of all Vehicle Sales

In contrast, Non-Hispanics are more likely to turn to other brands with only 73.6% of purchases going to the Top 10 brands.

San Antonio
% of Hispanic Sales
Top 10 Brands vs Other



San Antonio
% of Non-Hispanic Sales
Top 10 Brands vs Other

