



Experian Automotive Quarterly Briefing

Second quarter 2019 automotive market share,
trends and registrations

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Today's presentation



What's on the Road

VIO by model year, segment, age and market share

U.S. light duty vehicles through June 30, 2019

New, Used and other market changes

Industry news and special market analysis:

- The Canadian vehicle market



Experian Automotive

Driving the automotive industry forward

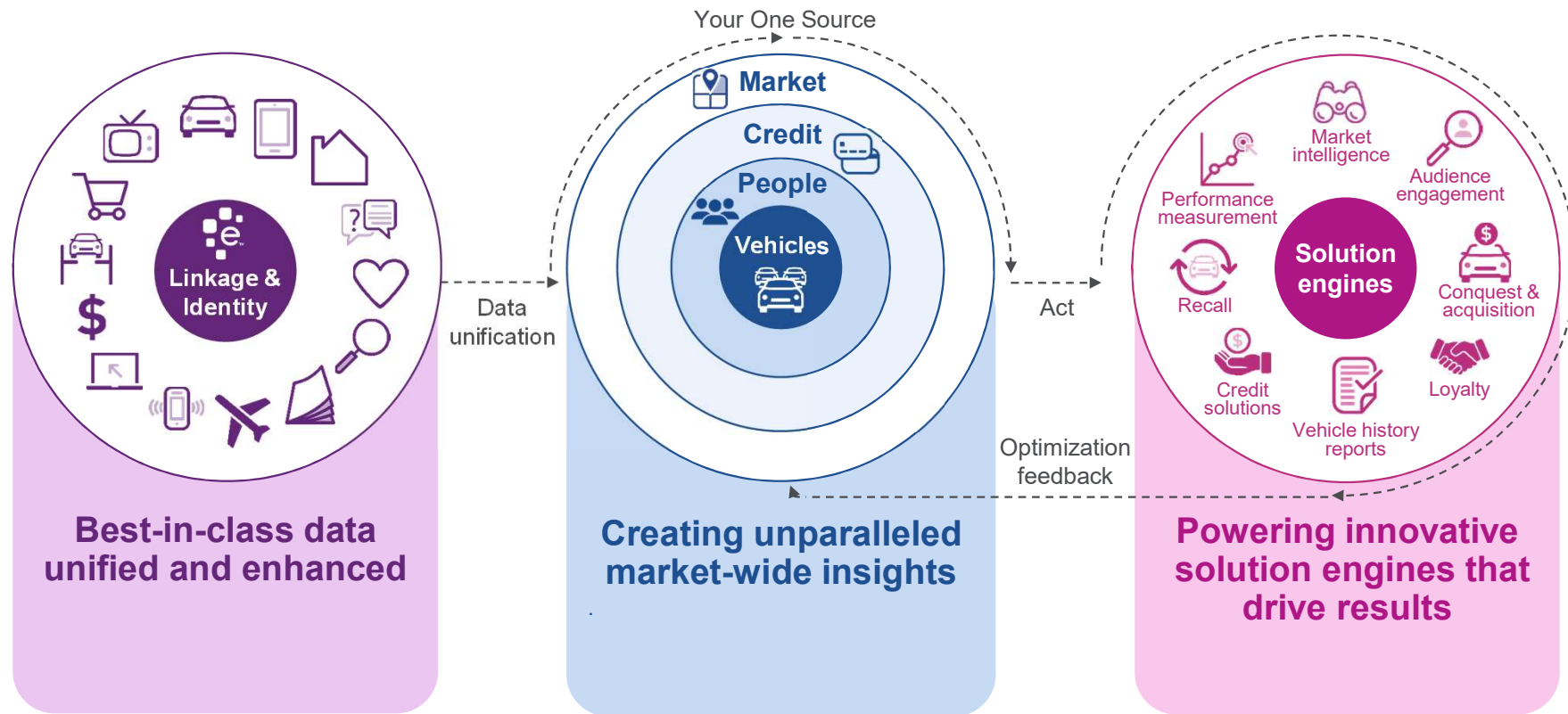
The right vehicles. The right customers.
The right data to know the difference.

- We deliver an integrated perspective using the highest quality automotive information and market intelligence focused on these key areas:
 - Automotive Credit
 - Automotive Marketing
 - Vehicle Market Statistics
 - AutoCheck® Vehicle History
- Our success comes from delivering actionable insights and lasting partnerships with our clients

<https://www.experian.com/automotive/auto-data>

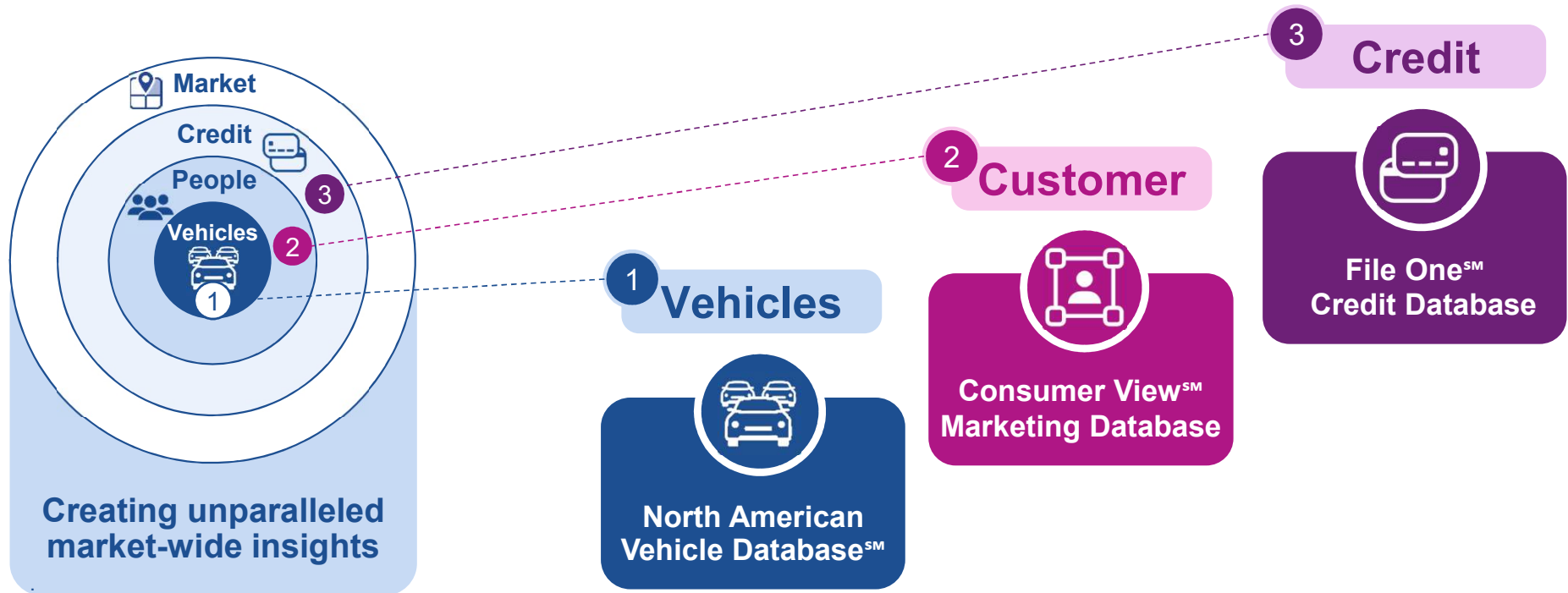
The power of Experian data

Your unified source of automotive data enabling you to link insight into action



It takes 3 things to sell a vehicle...

Only Experian provides all three data sources under one roof



U.S. and Canada total Vehicles in Operation = 325.4M

Light Duty

Passenger Cars, Light Trucks, Vans

Cars and GVW Class 1 – 3

Medium & Heavy Duty

Large Vans, Delivery Trucks, Buses, RVs,
Cement Trucks, Semi-Tractors

GVW Class 4 - 8

Power Sports

Motorcycles, All-Terrain,
Utility Task, Snowmobiles



Types of vehicles by weight class

Cars and CUVs



CLASS
1 6,000 lbs. or less



CLASS
2 6,001 to 10,000 lbs.



CLASS
3 10,001 to 14,000 lbs.



CLASS
4 14,001 to 16,000 lbs.



Power sports



CLASS
5 16,001 to 19,500 lbs.



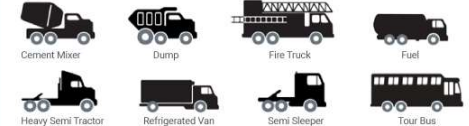
CLASS
6 19,501 to 26,000 lbs.



CLASS
7 26,001 to 33,000 lbs.



CLASS
8 over 33,000 lbs.





Vehicles in Operation

What's on the road today?

Light Duty Vehicles

Cars and CUVs



Passenger Car



Cross-over (CUV)

CLASS

1 6,000 lbs. or less



Full Size Pickup



Mini Pickup



Minivan



SUV



Utility Van

CLASS

2 6,001 to 10,000 lbs.



Crew Size Pickup



Full Size Pickup



Mini Bus



Minivan



Step Van



Utility Van

CLASS

3 10,001 to 14,000 lbs.



City Delivery



Mini Bus



Walk In

To find out more about Automotive Market and Registration Trends and access to the latest Experian Automotive Market Trends quarterly webinar, visit us at: www.experian.com/VIO, contact your local Experian sales representative or call 1 888 689 9961.

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03/19



Changes in U.S. vehicles in operation

Light duty vehicles* over the last 12 months

Q2 2019*

Q2 2019 Total*

278.1
MILLION

Vehicles on the road

Q2 2019 VIO changes



16.9
MILLION
NEW Vehicles
Registered



12.7
MILLION
Vehicles went
out of operation



41.9
MILLION
USED vehicles
changed owners

=



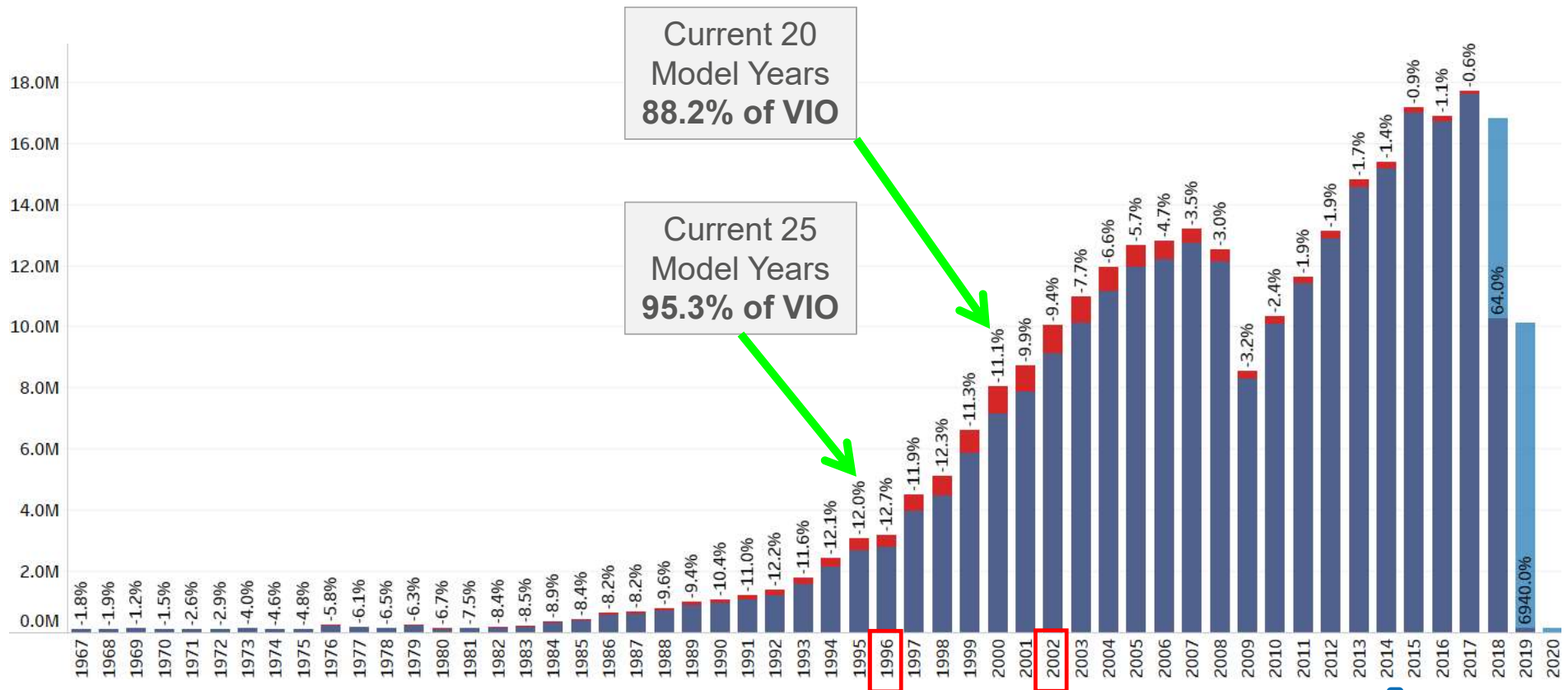
32%
Total VIO
changes¹

*U.S. Vehicles in Operation data as of June 30, 2019 sourced from Experian Automotive, including U.S. and Puerto Rico (U.S. light duty vehicles only).
1 – includes estimated annual households that relocated with the same vehicle(s)

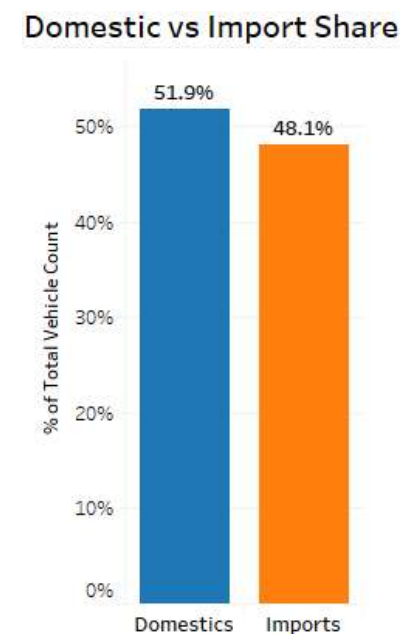
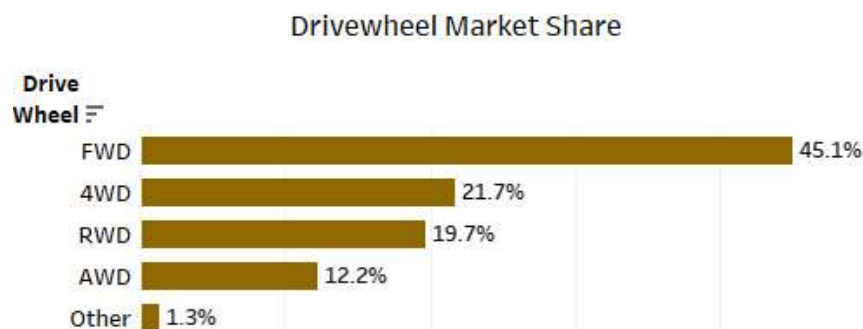
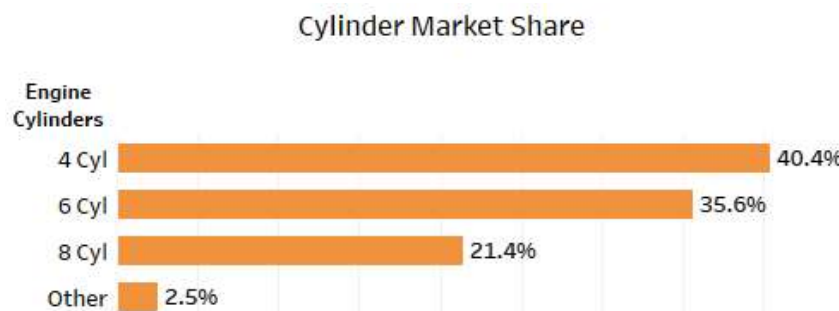
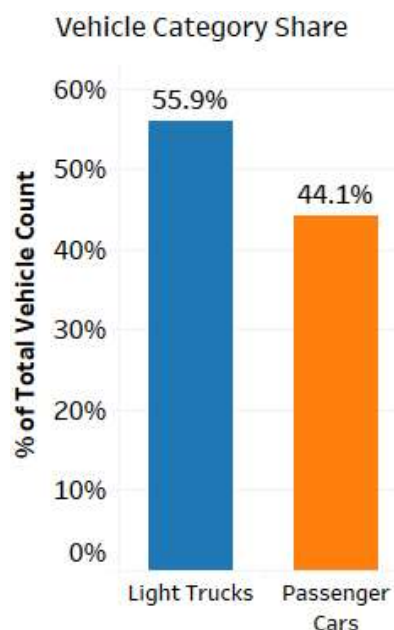
U.S. VIO change by Model Year (in millions)

Q2 2018 to Q2 2019

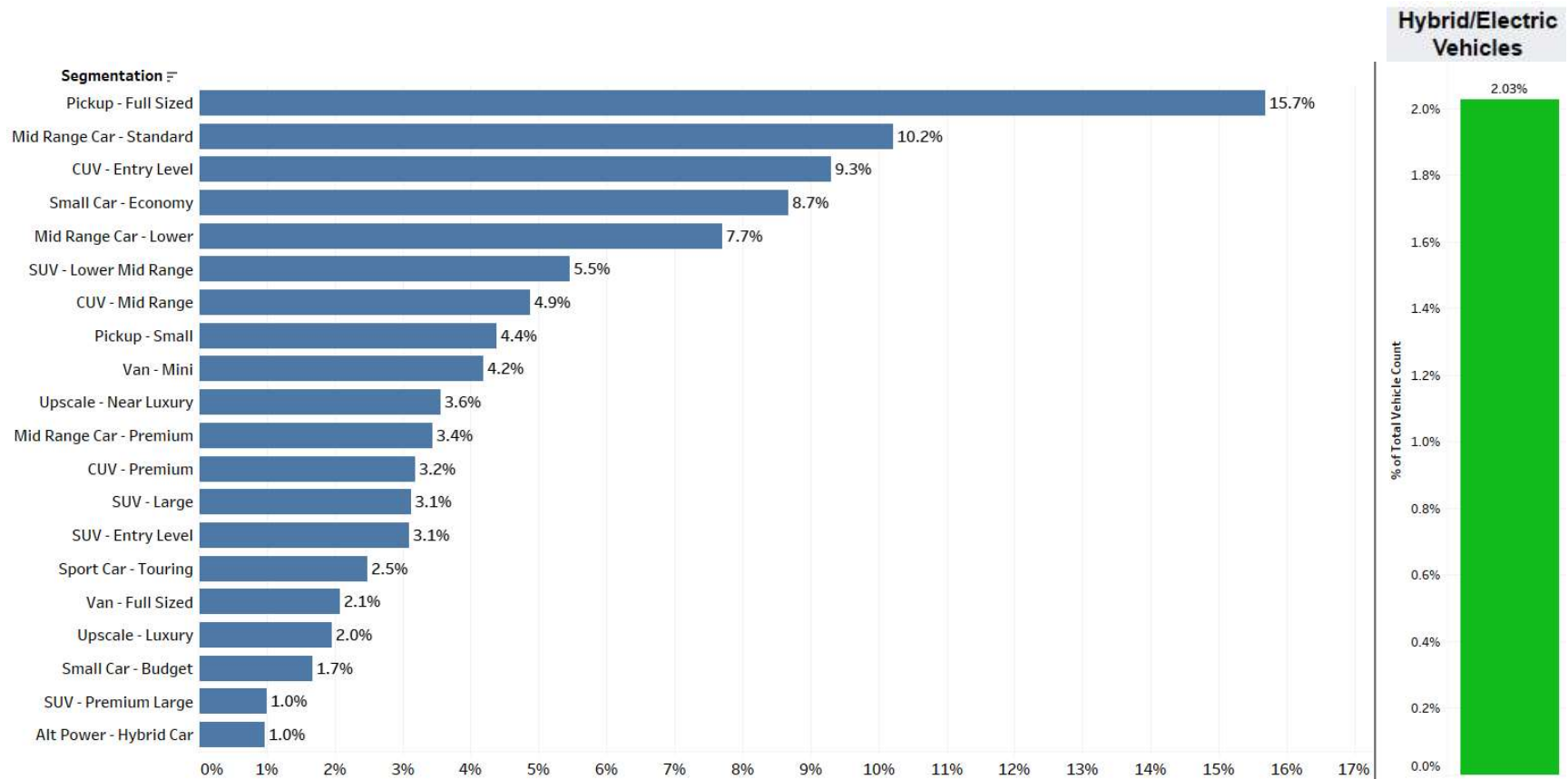
Out of operation
New vehicle sales
Carryover vehicles



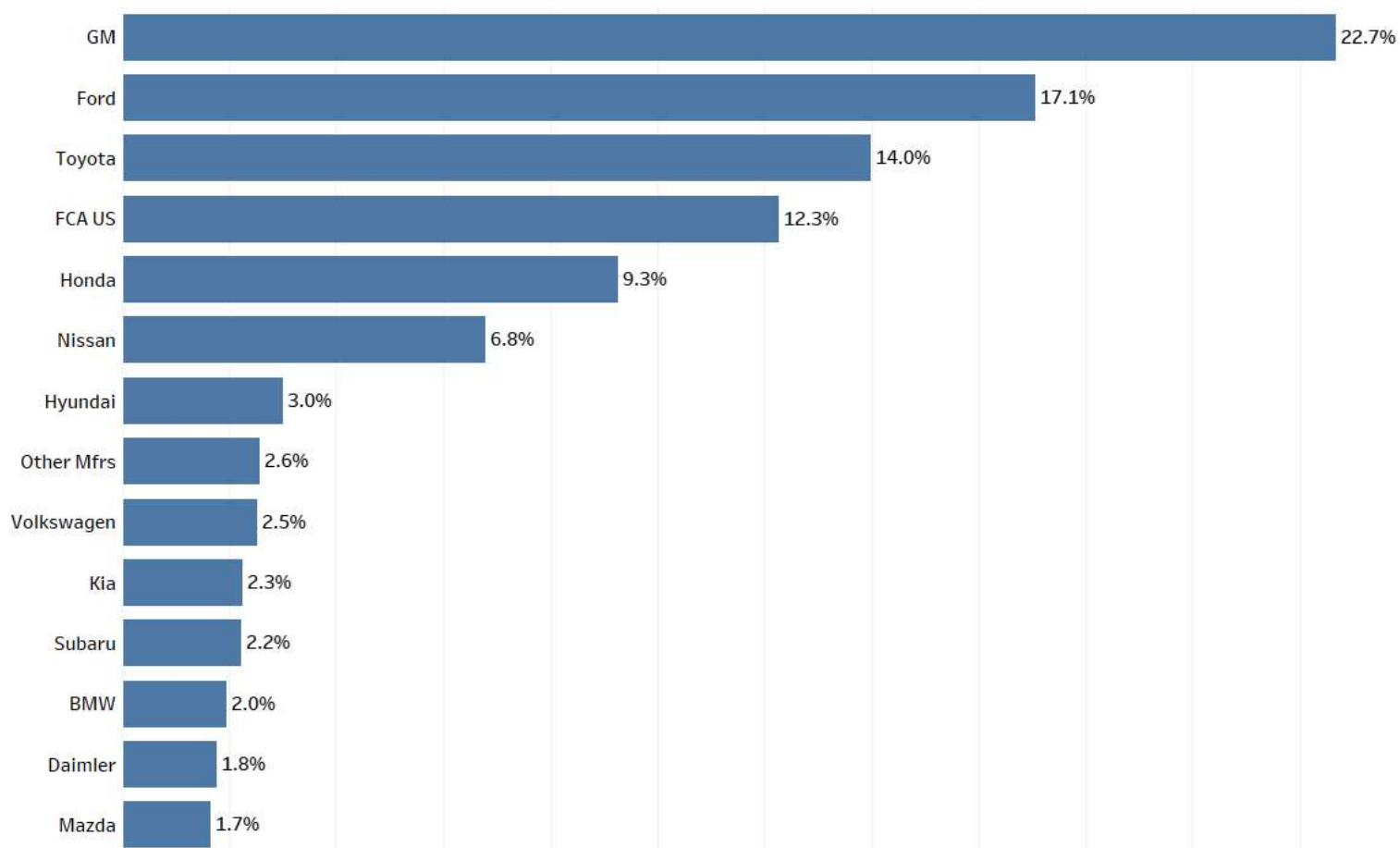
U.S. Summary Stats – for all light duty VIO as of Q2 2019



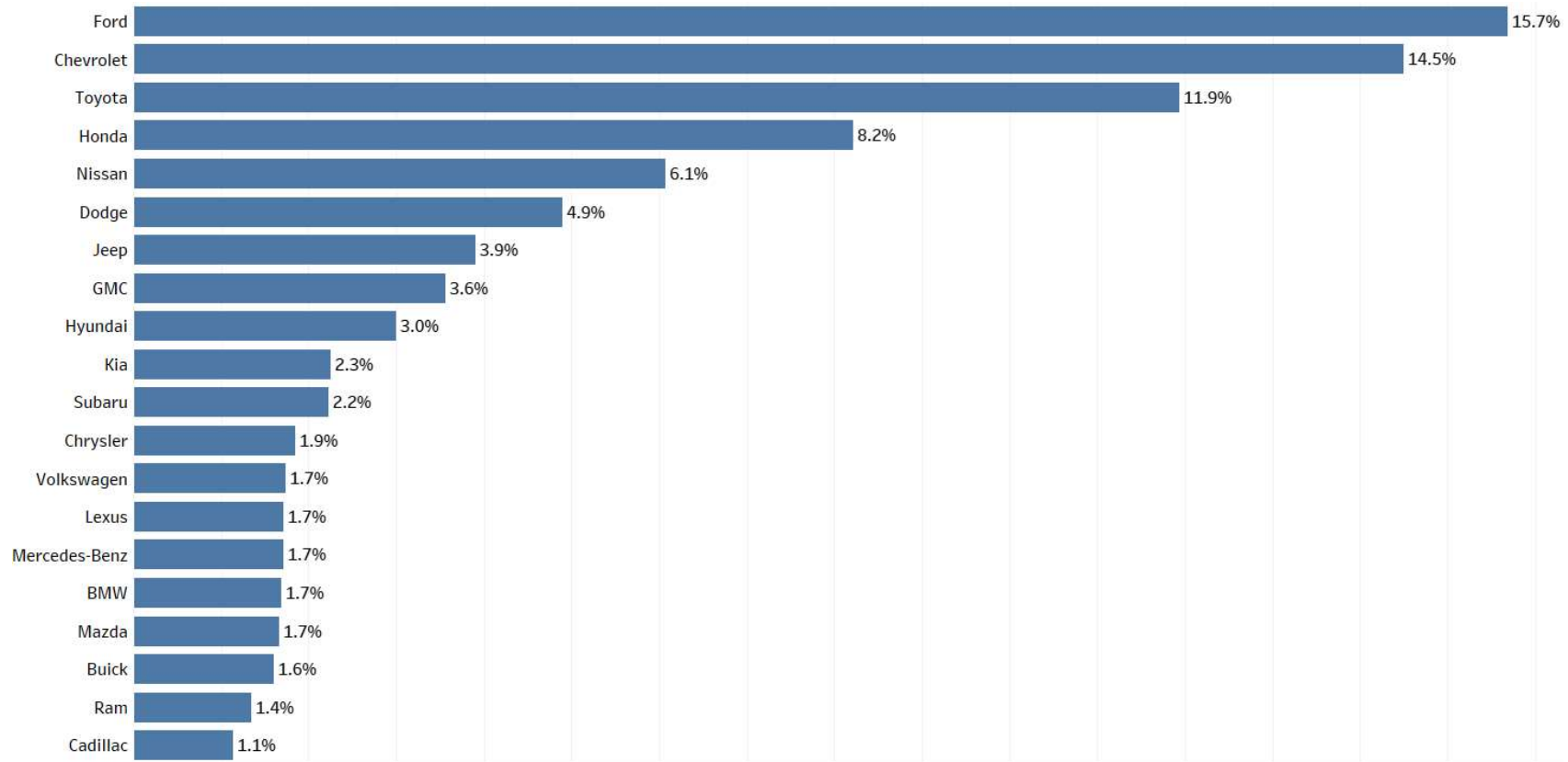
U.S. VIO Top 20 segments on the road market share



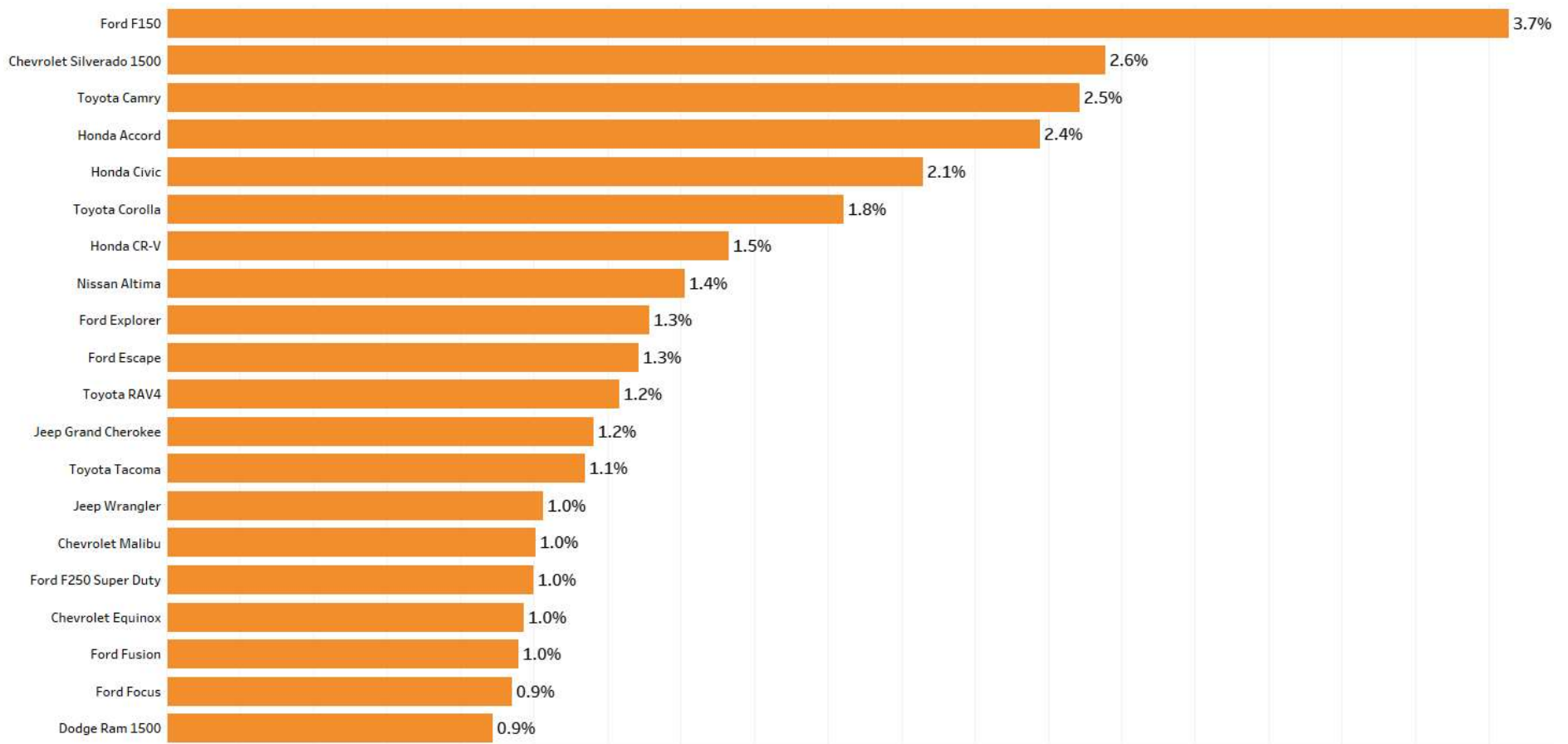
U.S. VIO by manufacturer market share



U.S. VIO Top 20 brands on the road market share



U.S. VIO top 20 Make/Model market share



The aftermarket “Sweet Spot” overview

“Post” and “Pre” Sweet Spot defined

The Aftermarket “*Sweet Spot*”

- 6 to 12 model year old vehicles
- Aged out of general OEM manufacturer warranties for any repairs
- Likely require more part replacement & services (e.g. shocks, timing belt service, engine repairs) that may be performed by aftermarket service shops using parts from aftermarket part manufacturers
- Sizing the Sweet Spot helps identify overall market potential and changes can have implications to those that service it

“*Post Sweet Spot*” vehicles

- 13 model years old & older
- Less costs may be spent to service them due to their age and vehicle value

“*Pre Sweet Spot*” vehicles

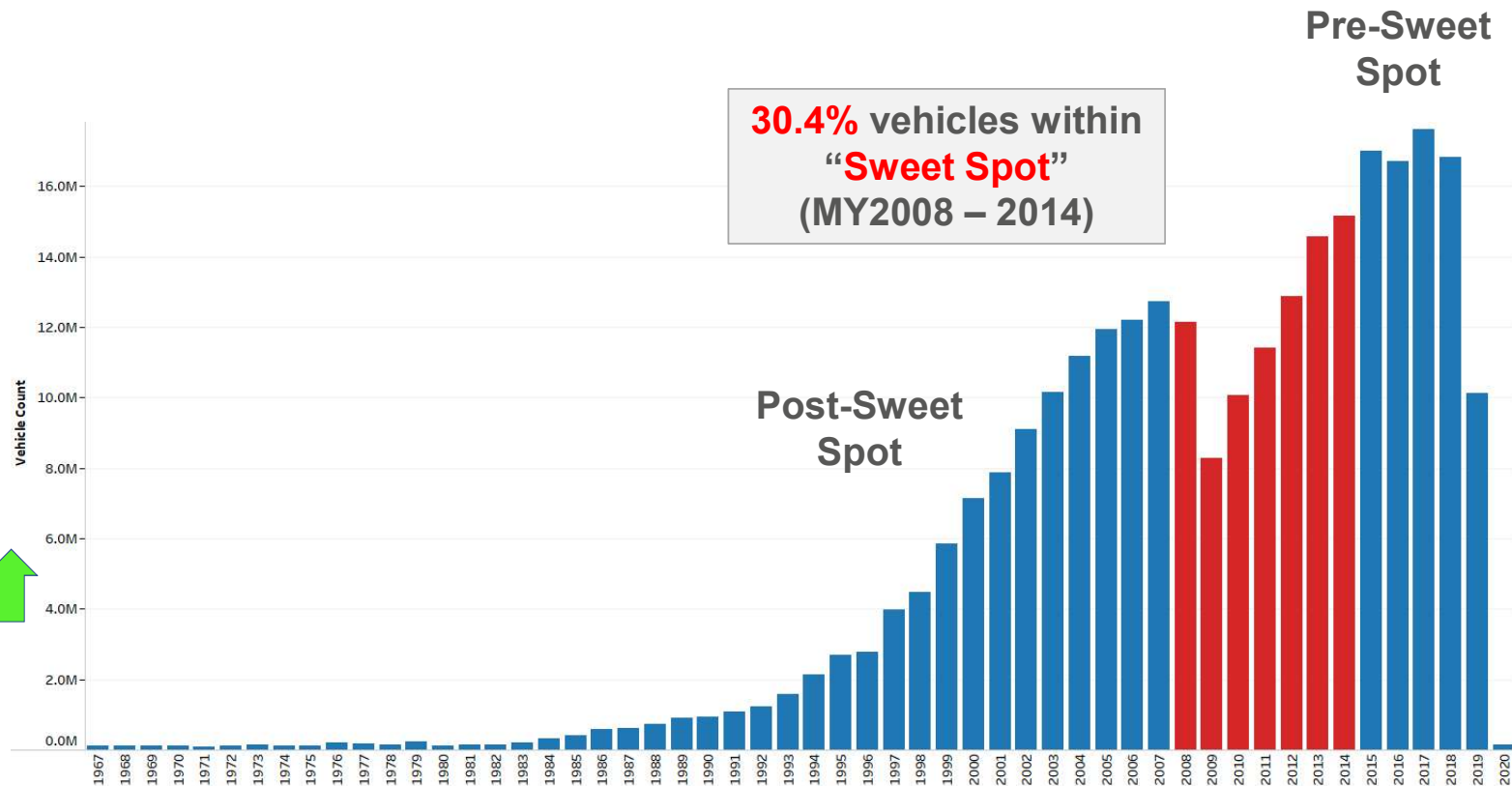
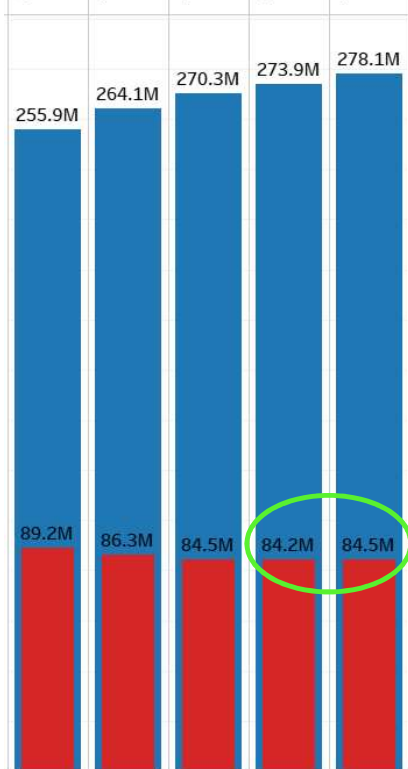
- 5 model years old & newer; many covered by the vehicle’s manufacturer warranty
- Identifies models coming into the Sweet Spot

U.S. trend of total VIO compared to sweet spot volumes

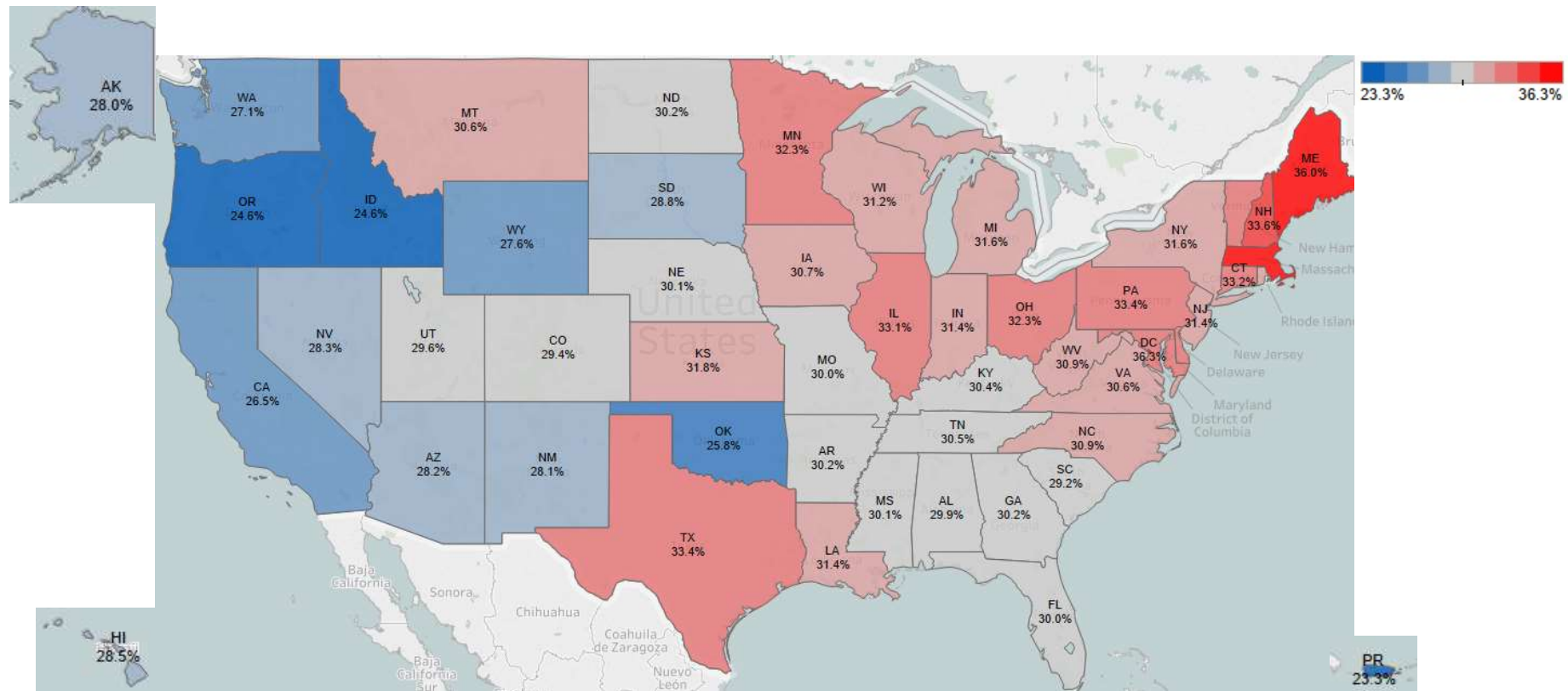
VIO by model year (in millions)

Total VIO vs Sweet Spot total

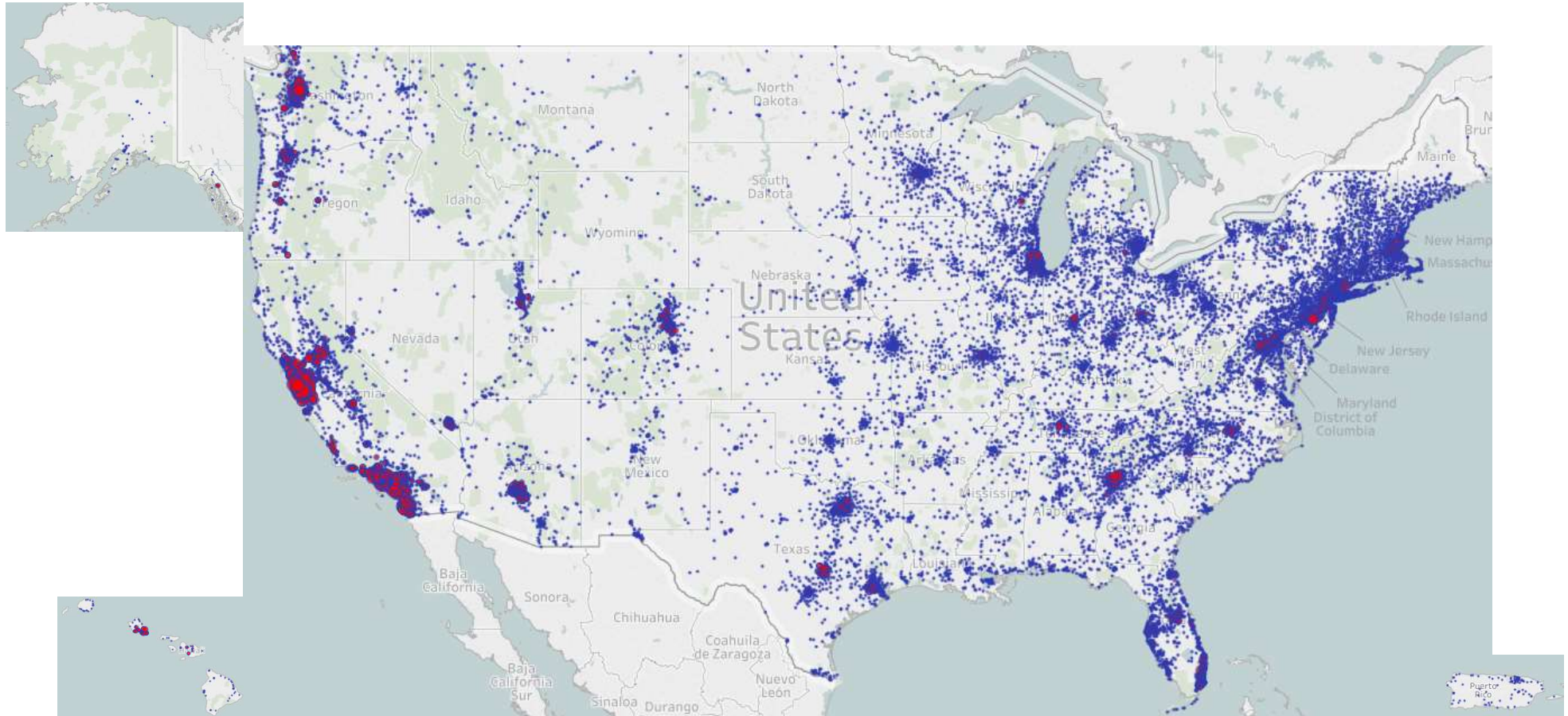
Q2 2015 Q2 2016 Q2 2017 Q2 2018 Q2 2019



Sweet Spot market share opportunities by state



The electric market by ZIP Code



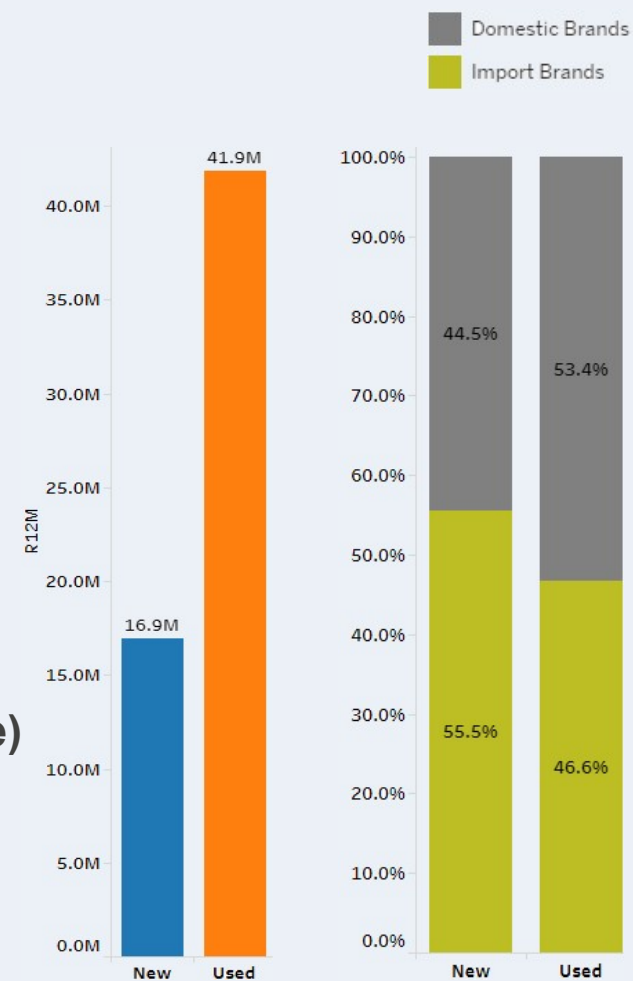


New and Used Vehicles

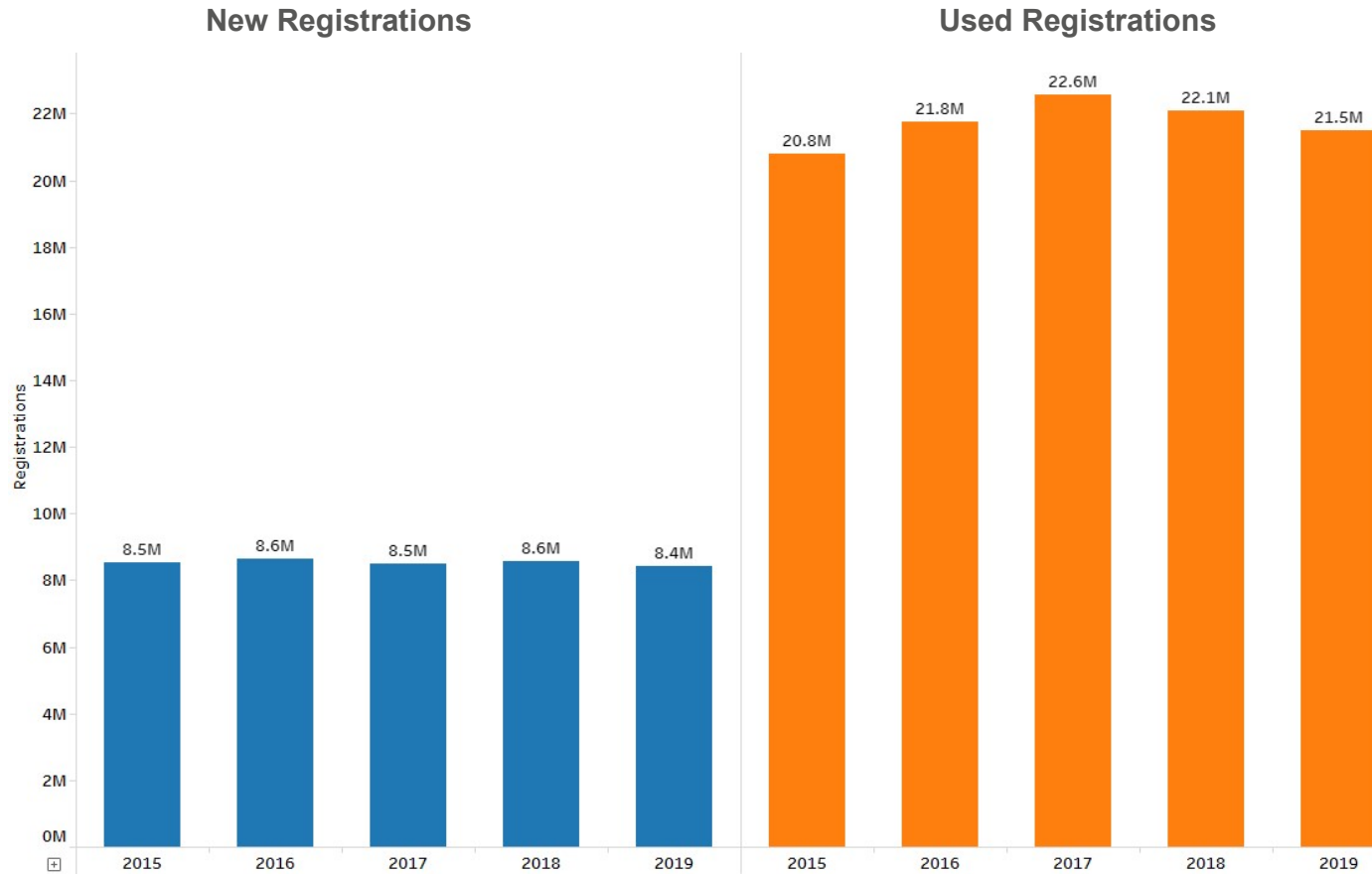
Volumes of New vs Used and Domestic vs Import
over the last 12 months

Market analysis through the 2nd quarter (January through June)

Electric vehicle market summary

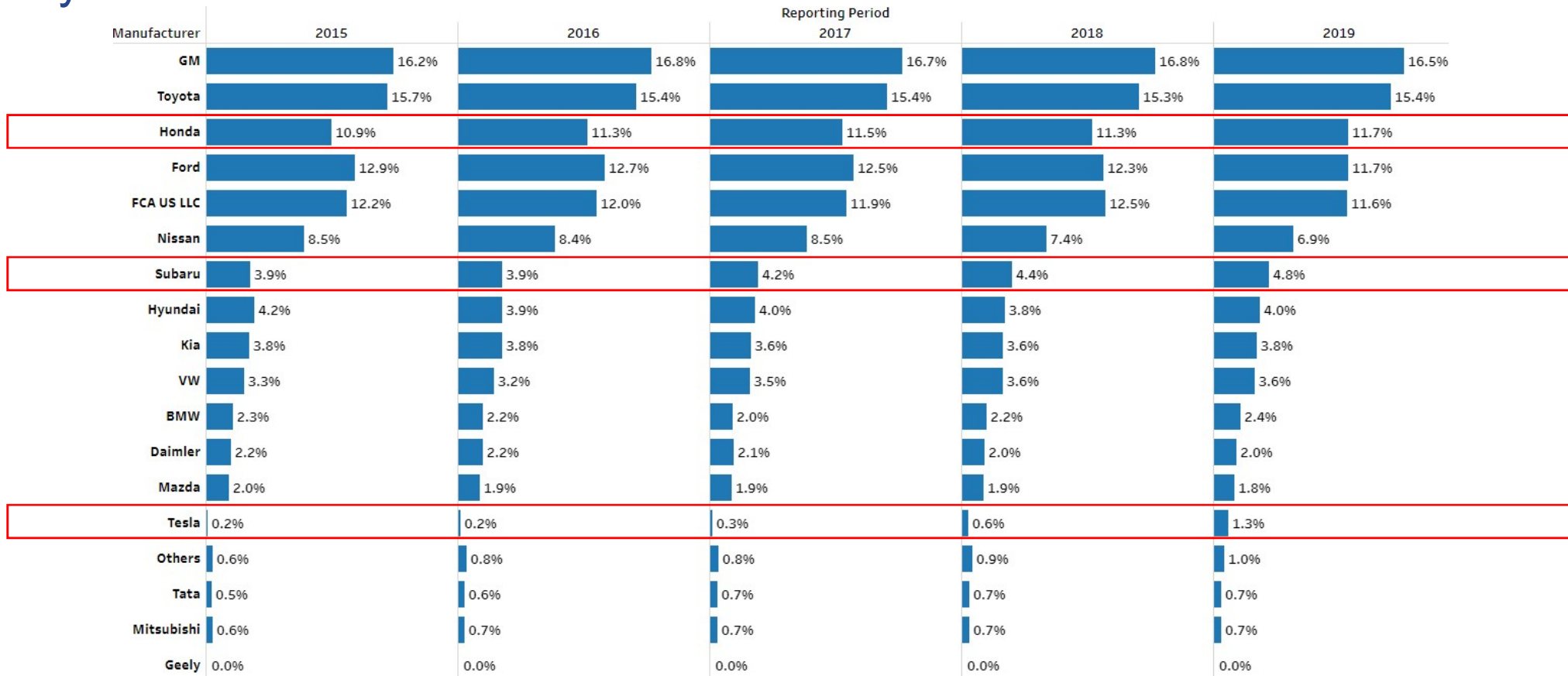


New and Used vehicle registrations through the 2nd quarter



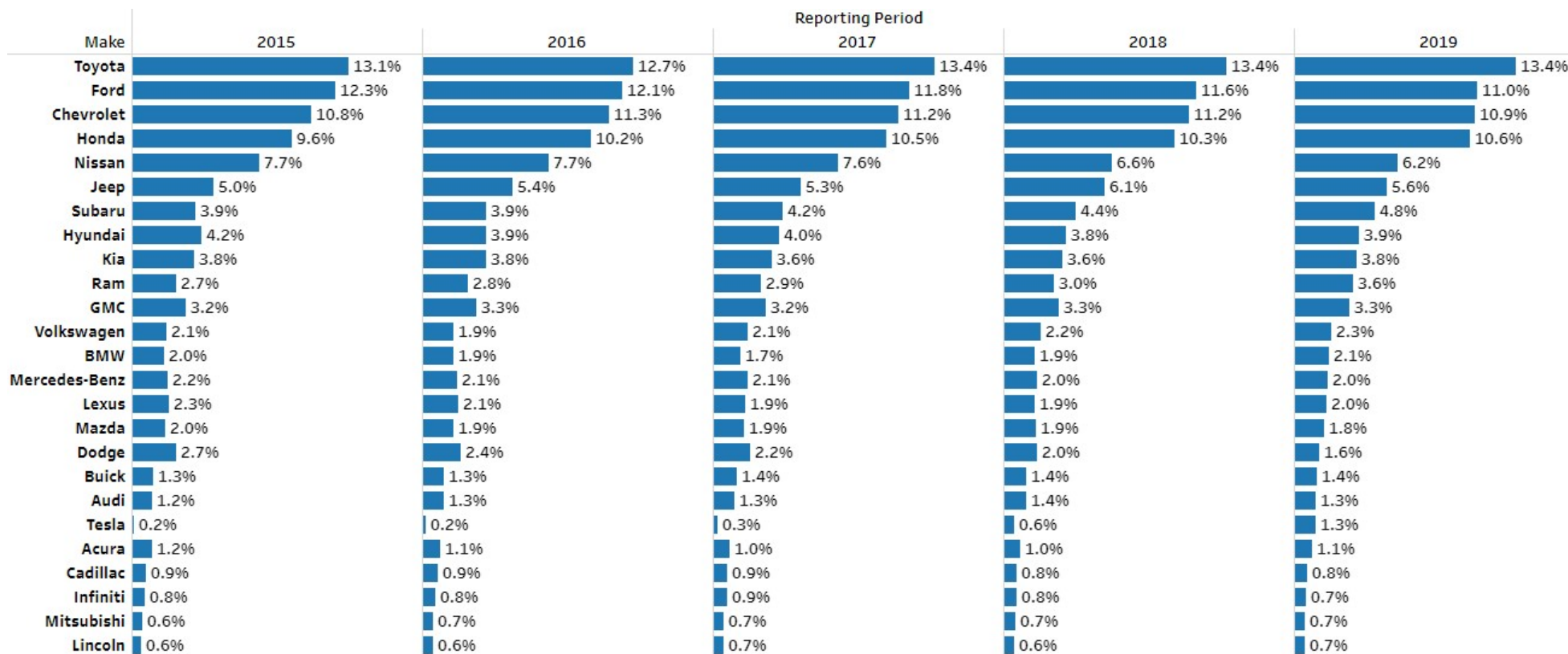
New vehicle registrations through the 1st quarter

By manufacturer



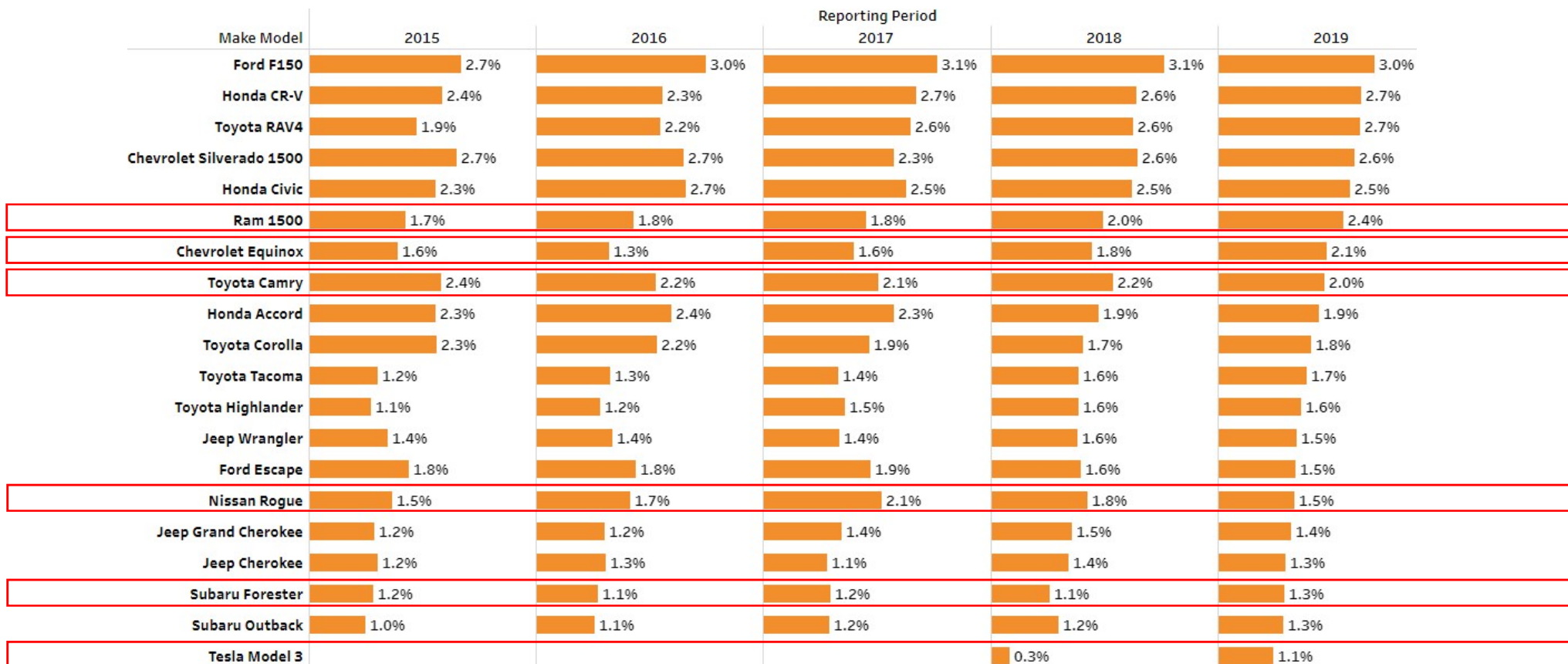
New vehicle registrations through the 2nd quarter

Top 25 brands of 2019



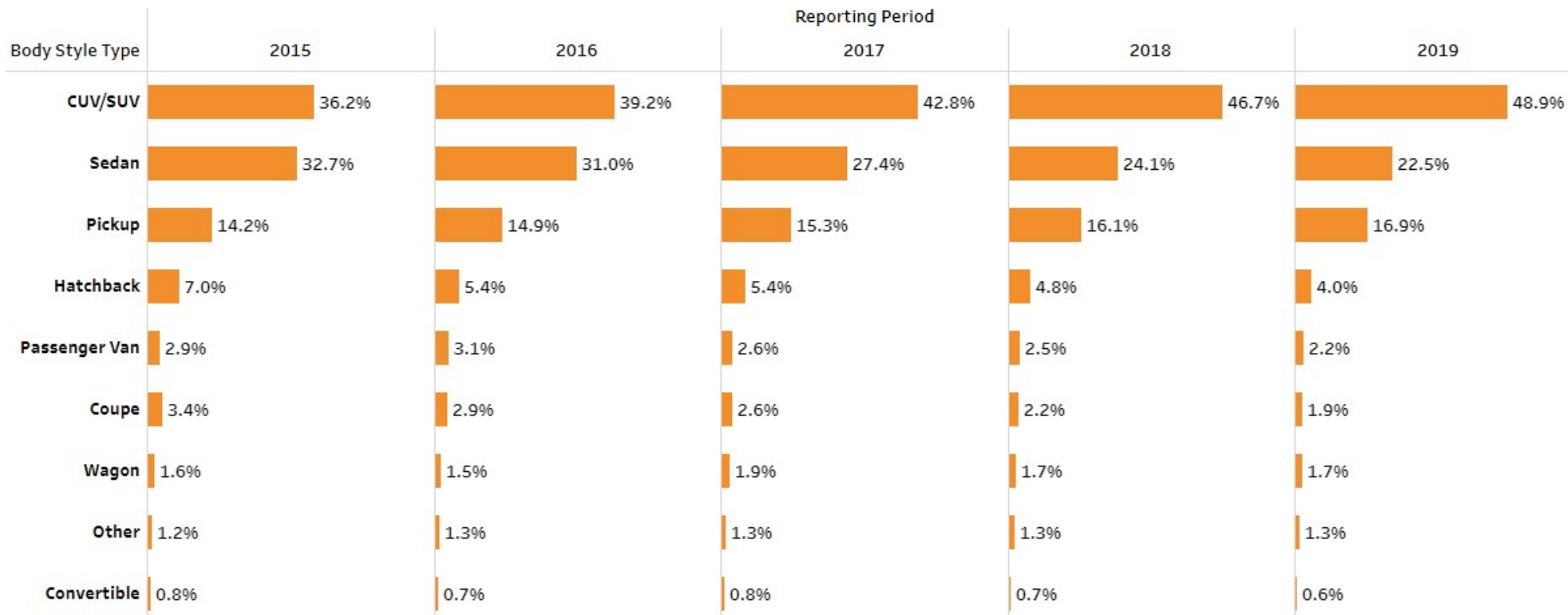
New vehicle registrations through the 1st quarter

By top 20 make/models



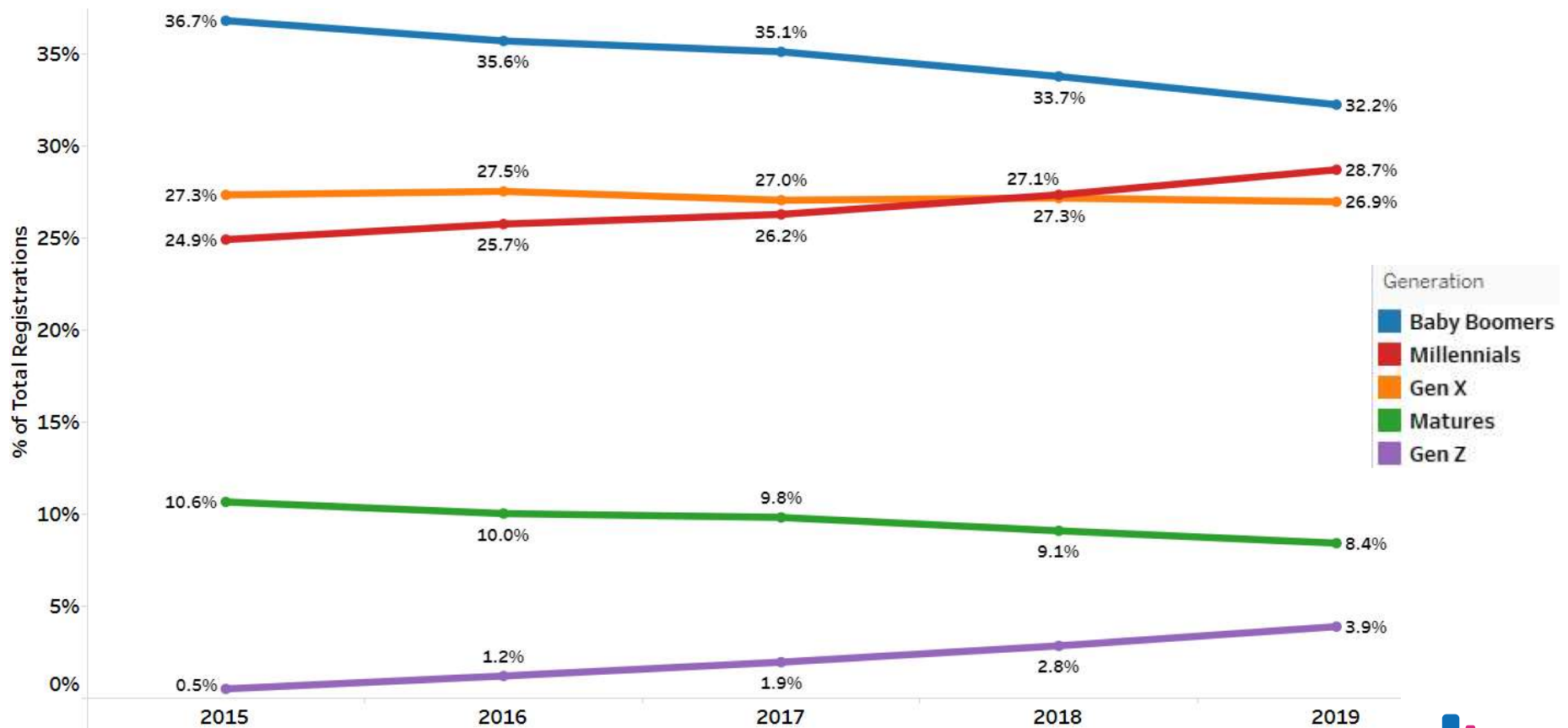
New vehicle registrations through the 2nd quarter

By body style type

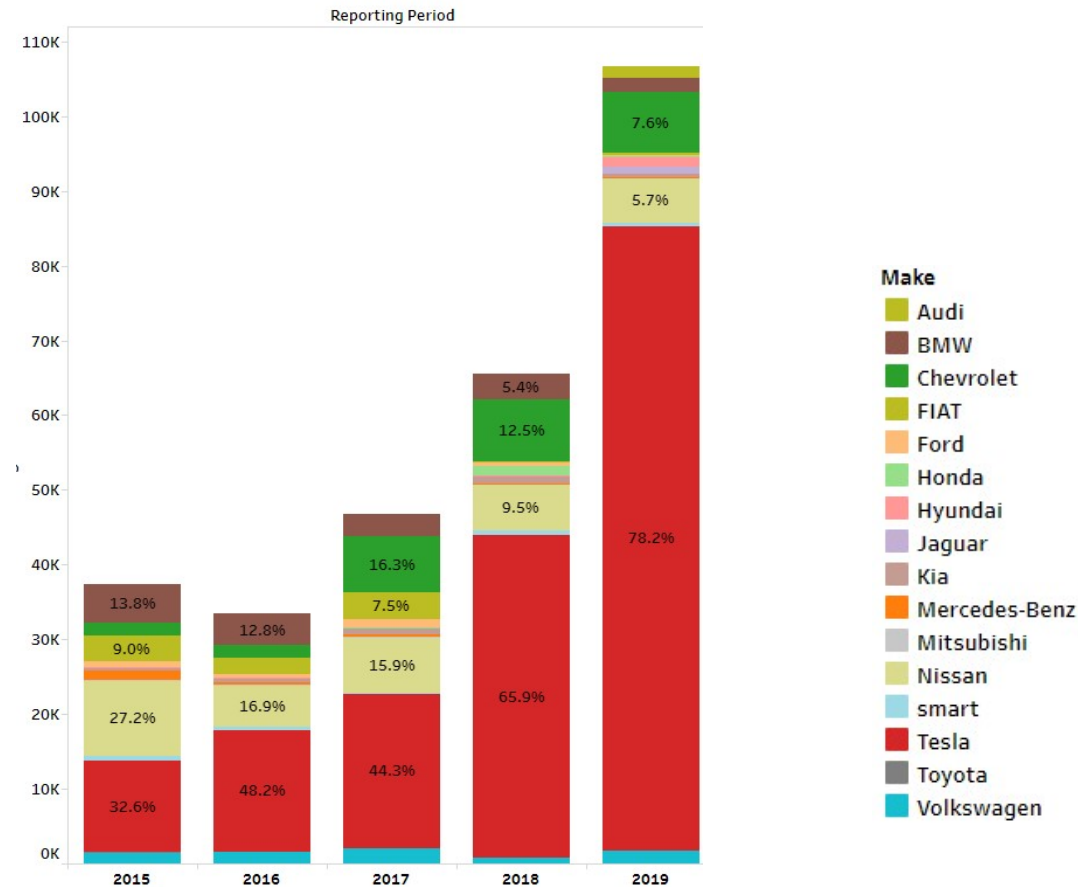


New vehicle registrations through the 2nd quarter

By generation



The electric market by Make – New registrations January – June 2019



Source: Experian Automotive as of January through June of each year (light duty vehicles only)



Automotive Analysis

Canadian vehicle market

CANADA

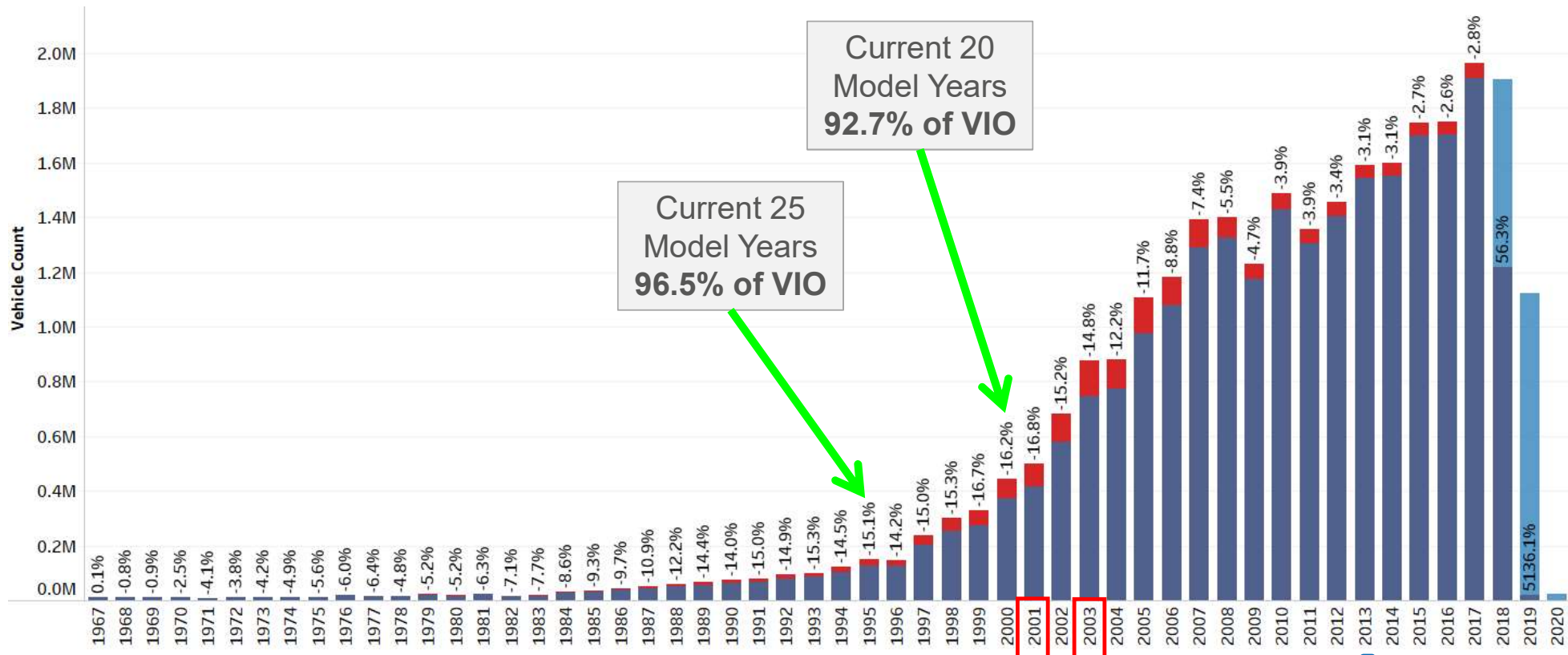
26.2 million



Canada VIO change by Model Year (in millions)

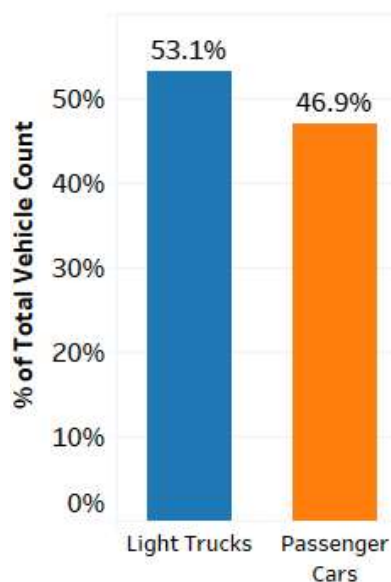
Q2 2018 to Q2 2019

Out of operation
New vehicle sales
Carryover vehicles

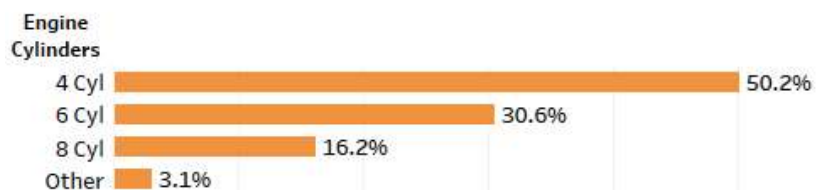


Canada Summary Stats - for all light duty VIO as of Q2 2019

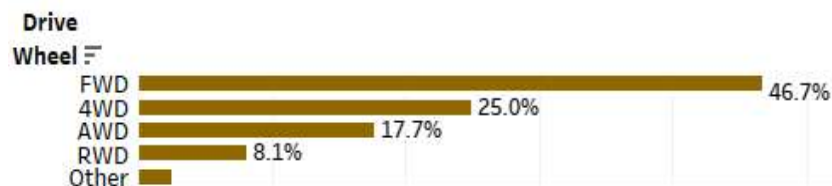
Vehicle Category Share



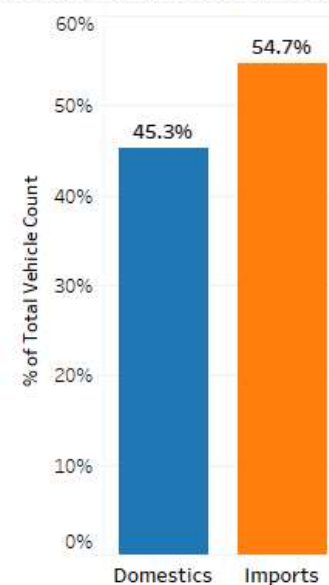
Cylinder Market Share



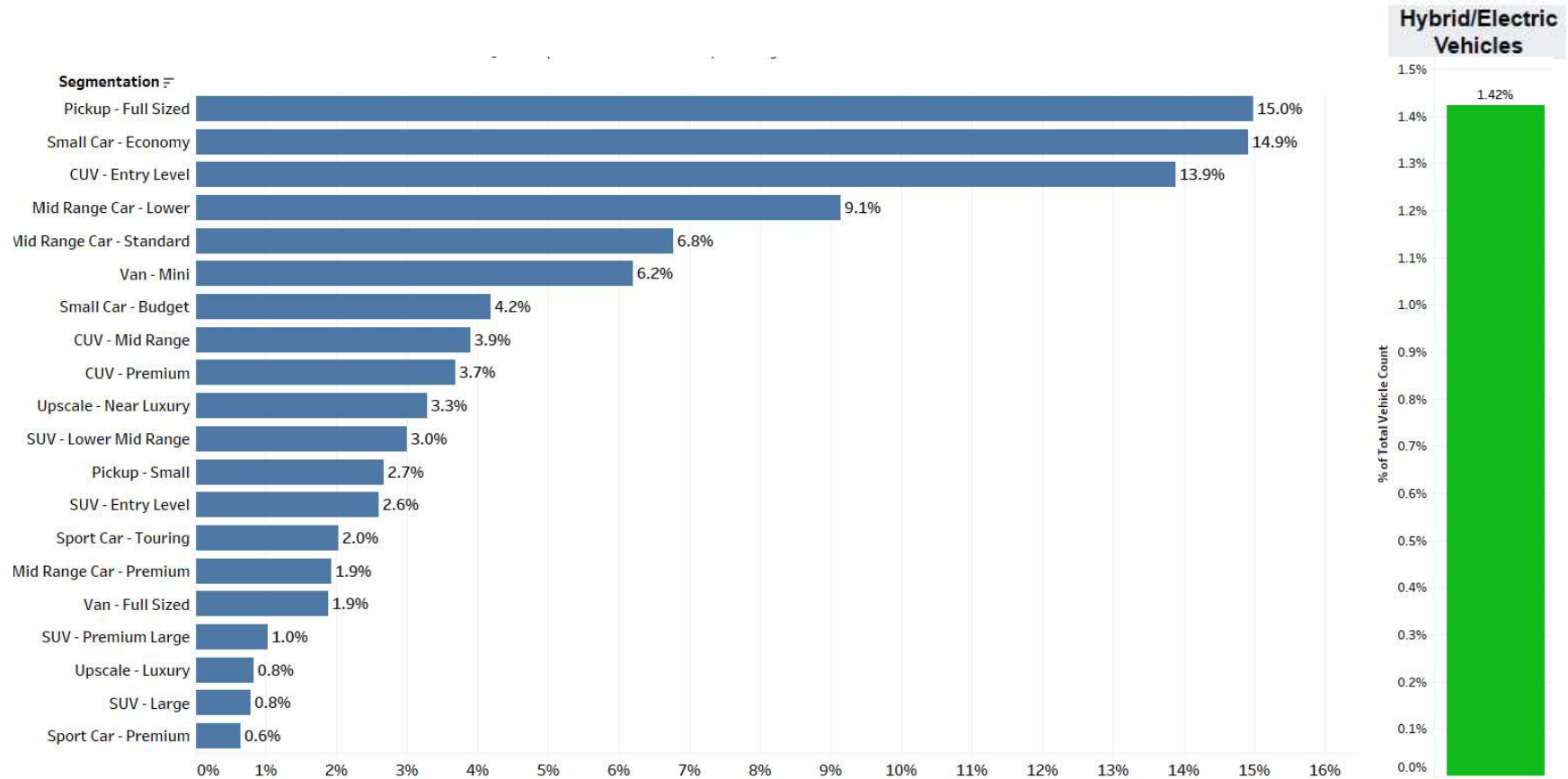
Drivewheel Market Share



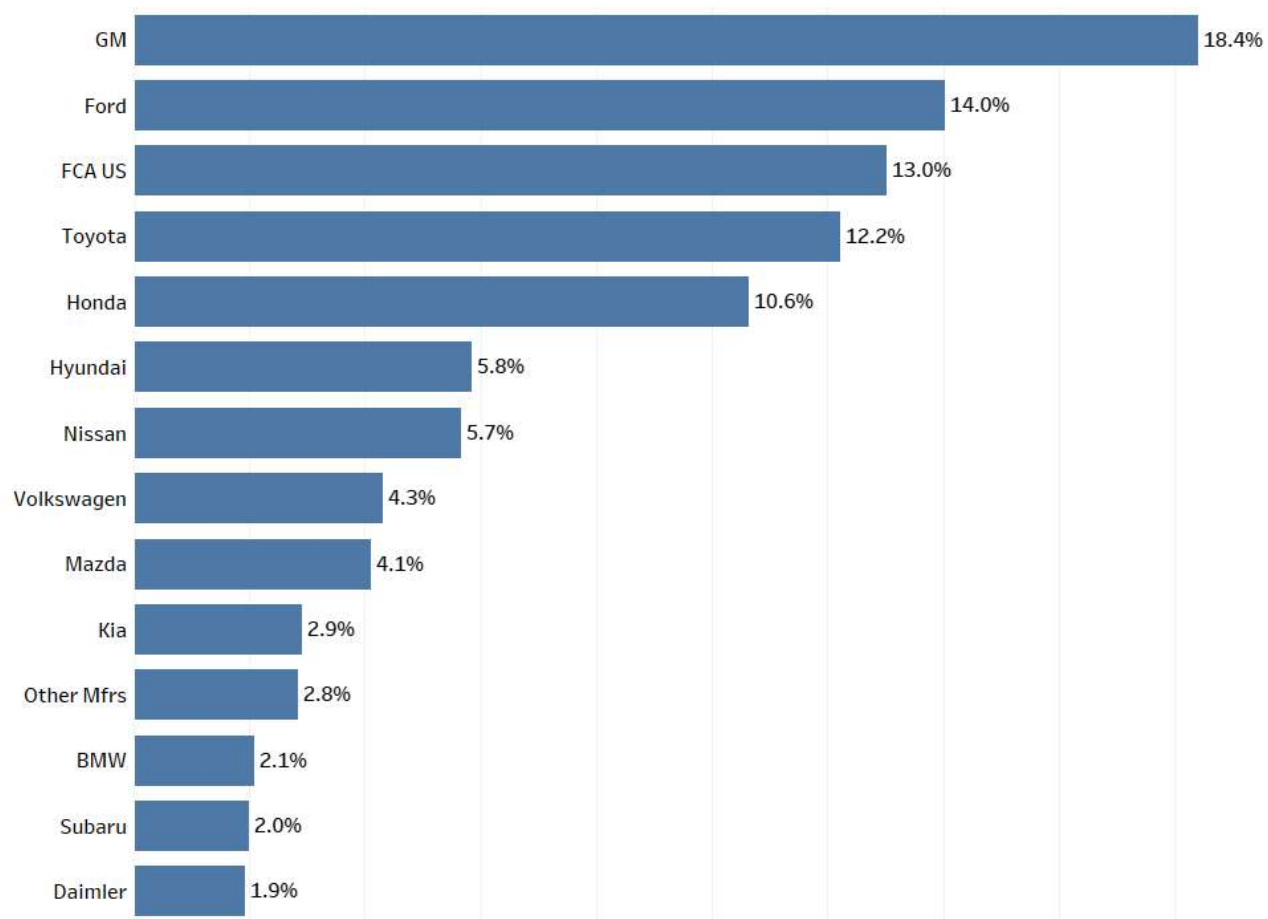
Domestic vs Import Share



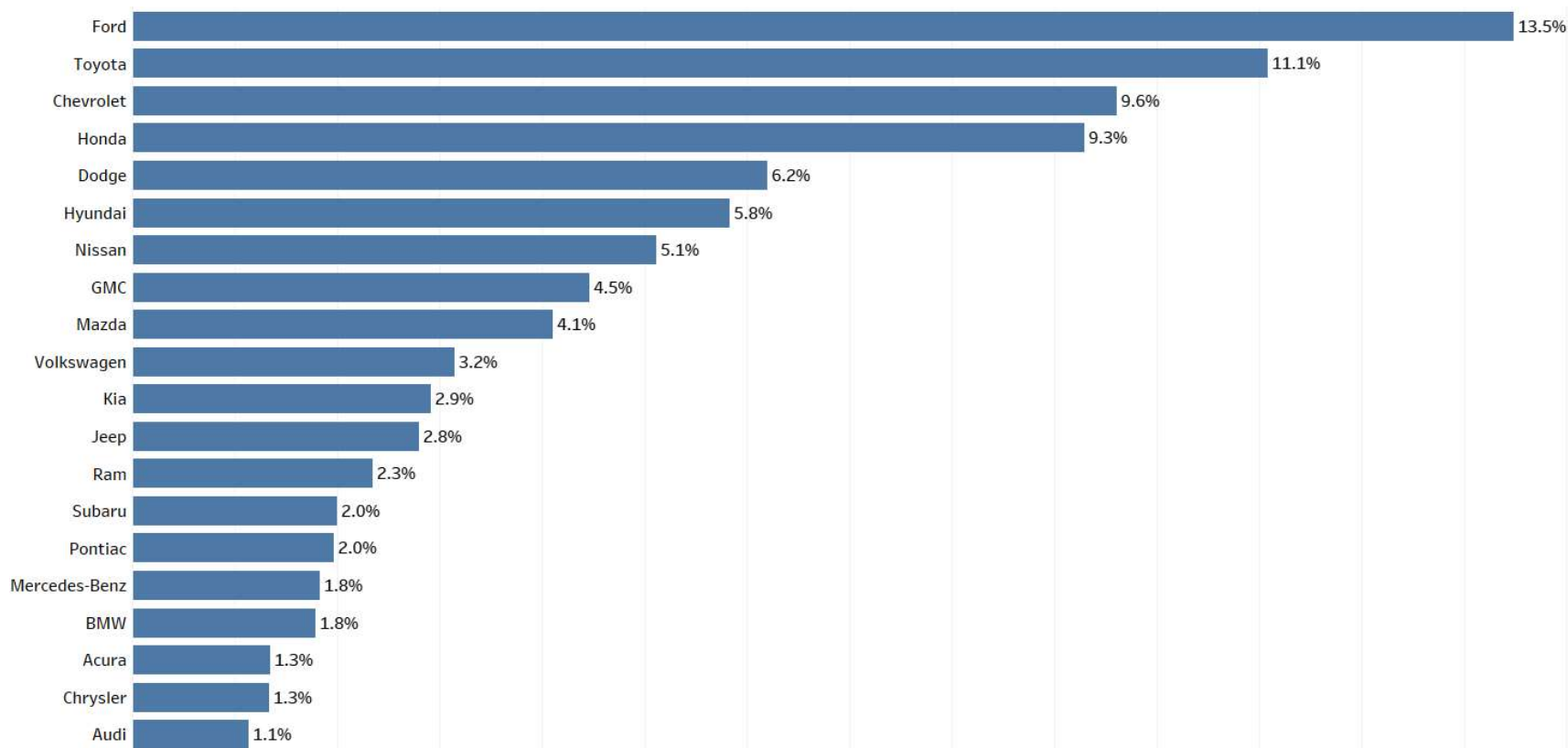
Canada VIO Top 20 segments on the road market share



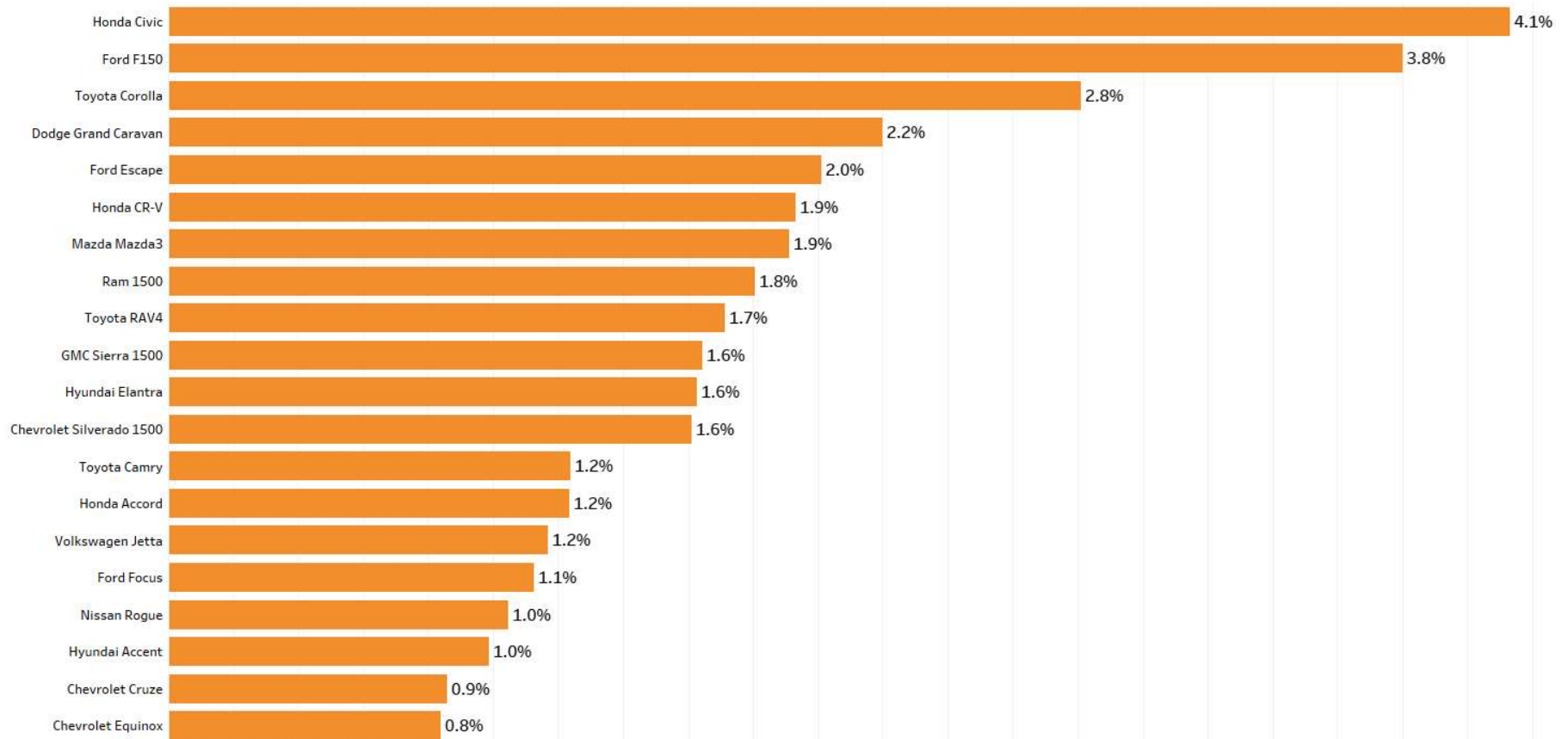
Canada VIO by manufacturer market share



Canada VIO Top 20 brands on the road market share

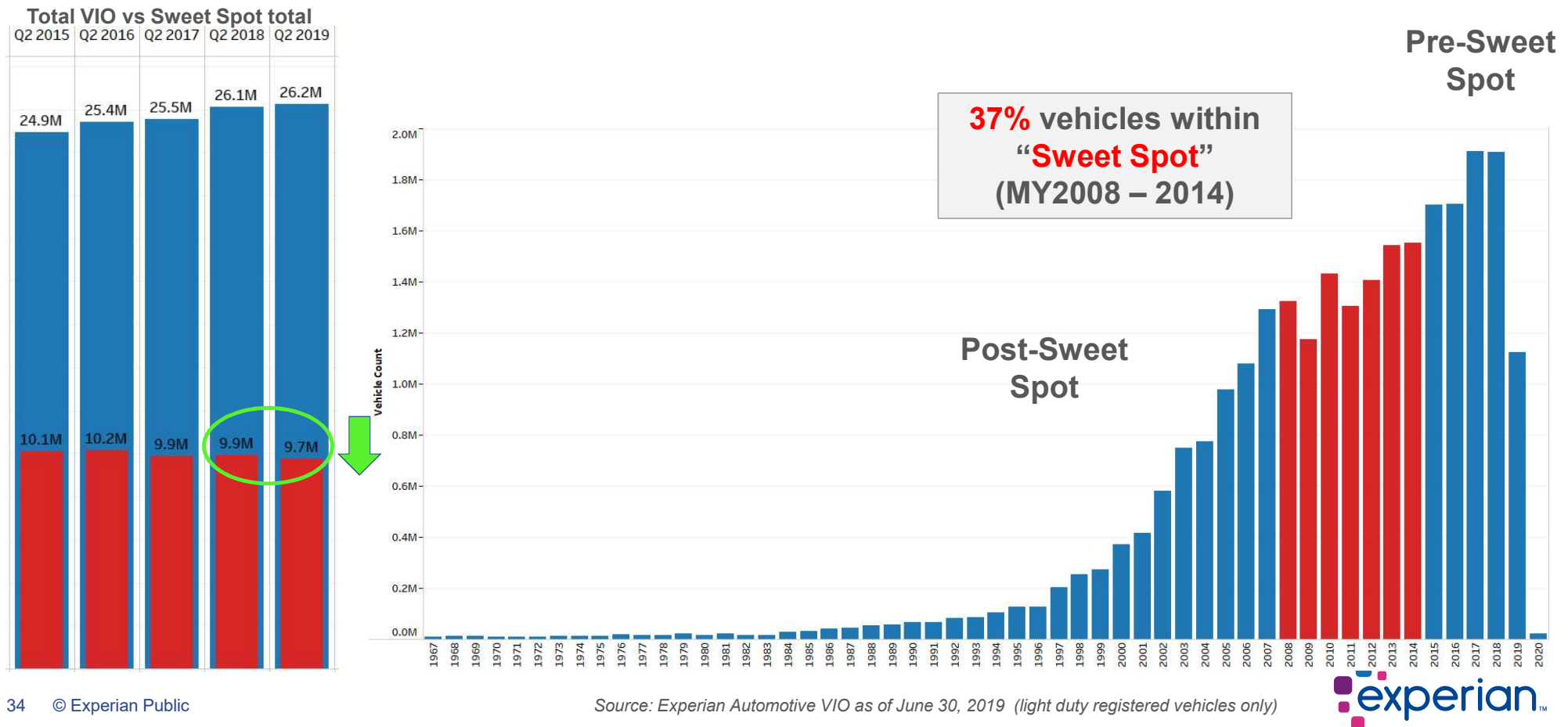


Canada VIO top 20 Make/Model market share

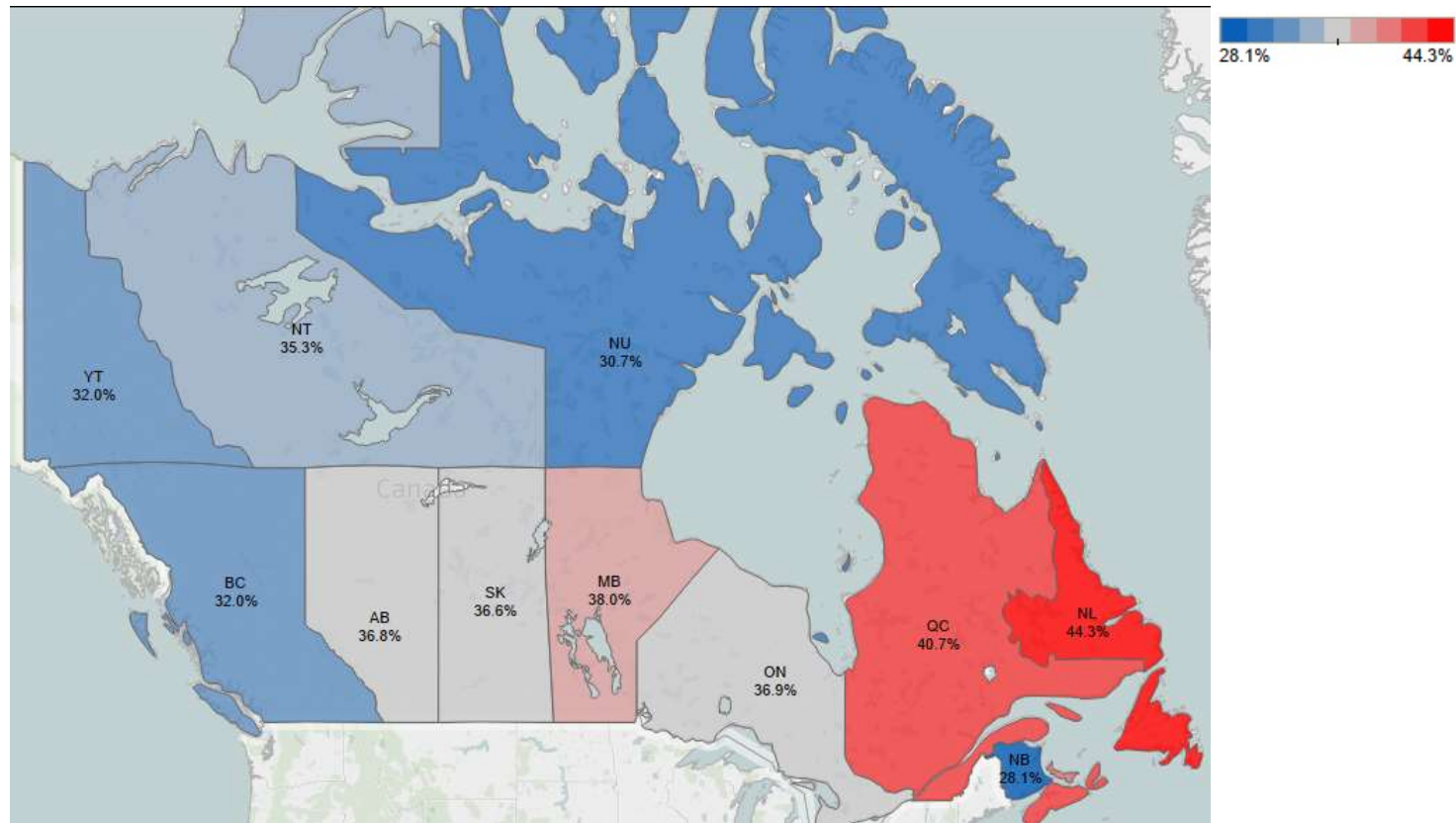


Canada trend of total VIO vs sweet spot volumes

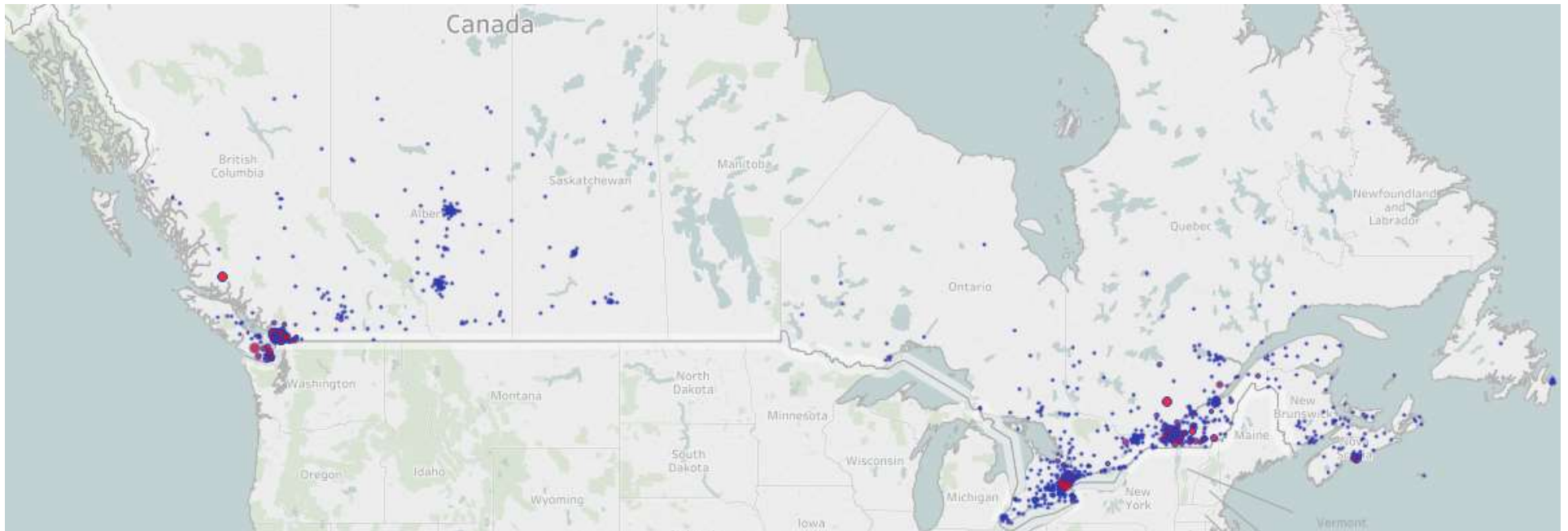
VIO by model year (in millions)



Sweet Spot market share opportunities by province and territory



The electric market by FSA Code



Summary

- Total light duty VIO continues to grow to 278.1 million in the U.S. market and 26.2 million in Canada
- The Aftermarket Sweet Spot has started growing in the U.S. as we predicted a few years ago, though the Sweet Spot has declined slightly in Canada.
- U.S. New and Used registrations have decreased slightly though still remain strong as New vehicle registrations has dipped below 17 million for the first time in many years.
- Cross-overs registrations within the U.S. of new vehicles continue to increase in sales over prior time periods, and dominate with nearly half of all new vehicle registrations.
- The electric vehicle market is growing as registrations increased over the first half of 2019.
- Canada, while similar in land size to the U.S., is 9.4% in vehicle market size compared to the U.S., and they also are different in the types of vehicles they drive.
 - More imports than domestic brands
 - Tend to own the types of vehicles that are built in Canada



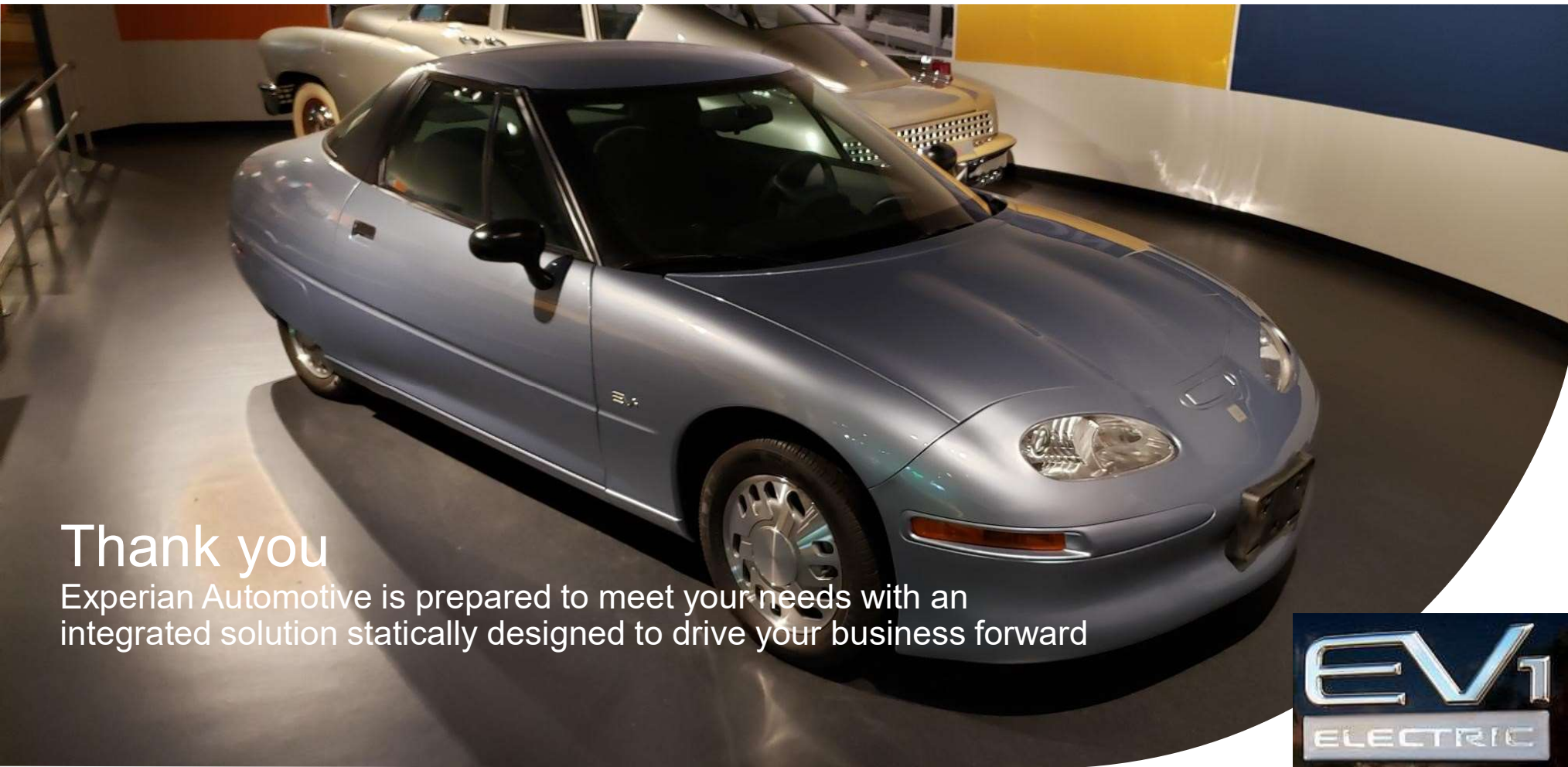
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