

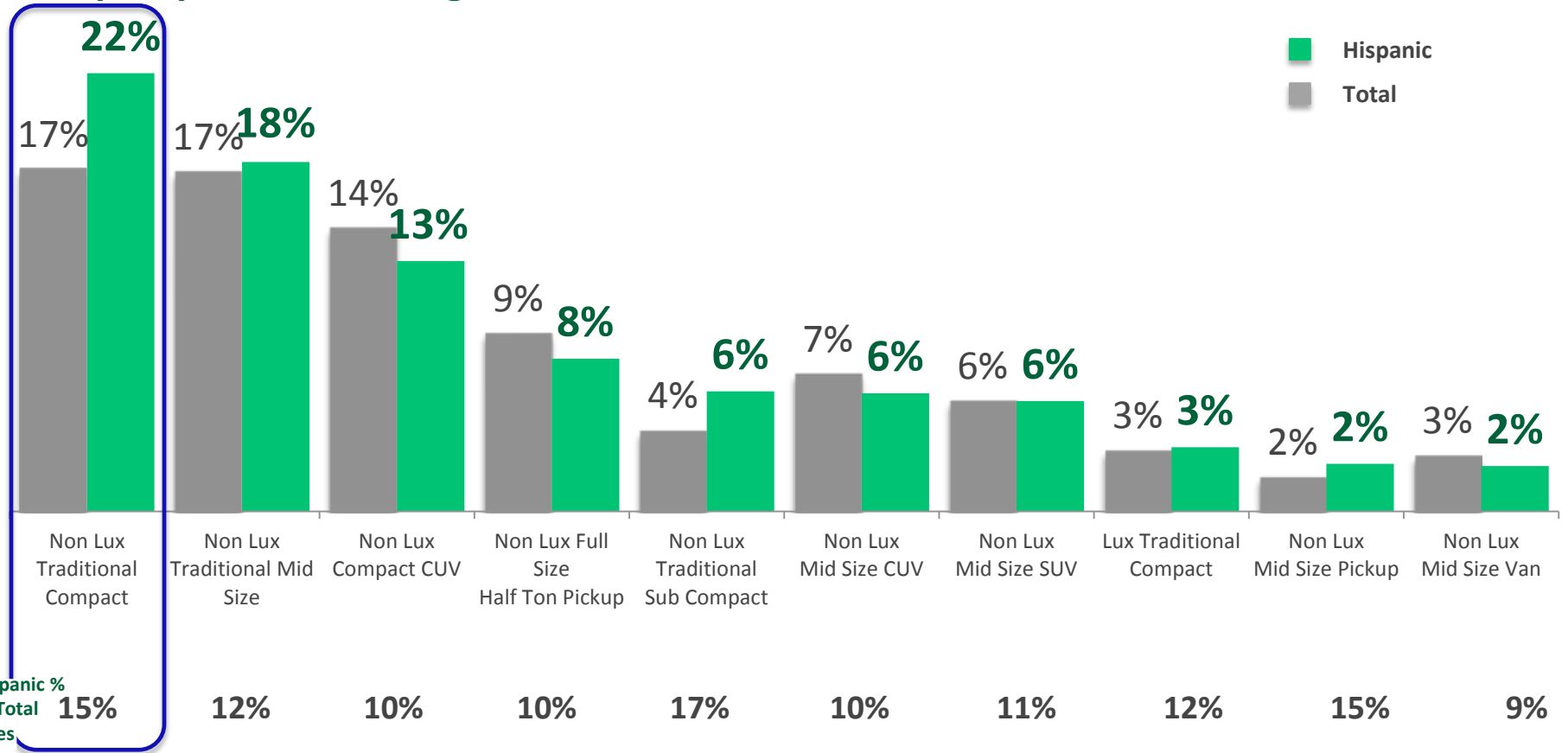
Compact Segment

Hispanic Insights



86% of Hispanic Sales are in Top Segments

Top Hispanic Vehicle Segments, U.S. – 1Q CY13



Compact Segment Hispanic Overview



1Q CY13 Hispanic Compact Segment Registrations

69,925

Hispanic Sales Represented

+22%

Over 1Q CY12 Sales
Total Segment +8%

15%

Of Total Segment
Sales

37%











Of Total Segment
Growth

Higher Hispanic Growth

Top 15 Hispanic Compact Segment DMAs

Total DMA Rank	Hispanic DMA Rank	DMA	Total Volume 1Q CY13	Hispanic Volume 1Q CY13	Total Volume YOY Growth 1Q CY13 vs. 1Q CY12	Hispanic Volume YOY Growth 1Q CY13 vs. 1Q CY12	% Hispanic 1Q CY13	Hispanic SOM 1Q CY13
1	1	Los Angeles	39,679	14,187	14.0%	28.7%	35.8%	20.3%
9	2	Miami	10,257	5,714	13.6%	13.3%	55.7%	8.2%
2	3	New York	32,816	5,309	7.9%	13.3%	16.2%	7.6%
3	4	San Francisco	16,250	3,021	22.5%	49.3%	18.6%	4.3%
11	5	Houston	8,525	2,271	6.4%	11.9%	26.6%	3.2%
5	6	Chicago	13,874	2,225	8.9%	19.6%	16.0%	3.2%
21	7	San Antonio	4,386	2,124	23.2%	28.0%	48.4%	3.0%
16	8	San Diego	7,420	2,008	8.7%	27.0%	27.1%	2.9%
28	9	Harlingen	2,261	1,976	36.8%	37.9%	87.4%	2.8%
8	10	Dallas	10,320	1,709	6.2%	10.8%	16.6%	2.4%
15	11	Orlando	7,859	1,645	17.2%	31.2%	20.9%	2.4%
6	12	Washington DC	12,702	1,501	1.7%	18.2%	11.8%	2.1%
30	13	El Paso	1,997	1,393	17.3%	19.9%	69.8%	2.0%
17	14	Sacramento	6,206	1,359	16.6%	48.4%	21.9%	1.9%
14	15	Phoenix	8,005	1,326	19.2%	34.5%	16.6%	1.9%
Top 15 DMA Total			182,557	47,768	12.0%	24.2%	26.2%	
Total U.S.			478,223	69,925	7.7%	22.4%	14.6%	

Corolla Leads in Non Luxury Traditional Compact Segment

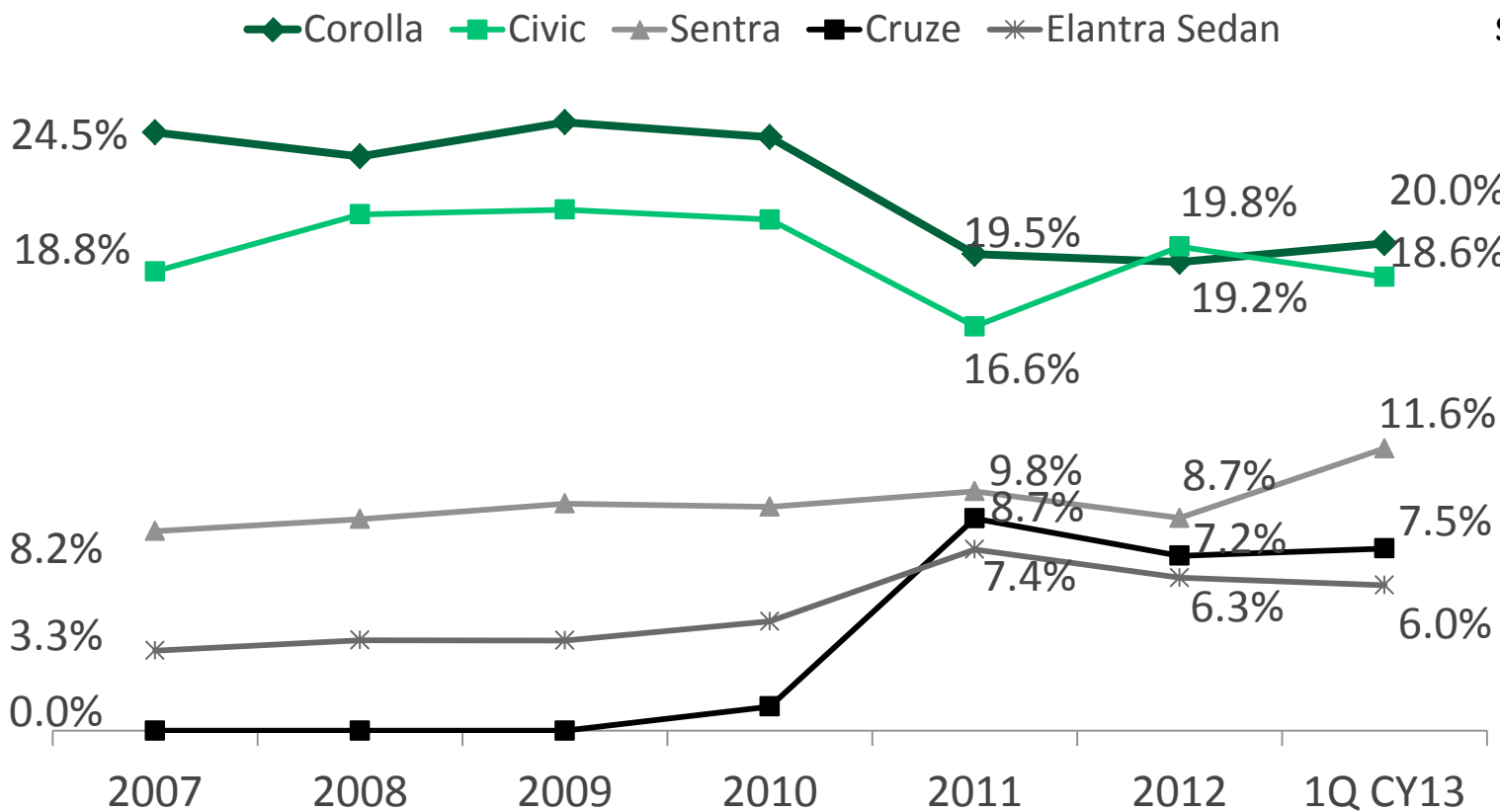
	2012 Hispanic Model Share Rank		Model Share of Hispanic Segment 1Q CY12	Model Share of Hispanic Segment 1Q CY13	Model Share of Total Segment 1Q CY12	Model Share of Total Segment 1Q CY13	% of Sales to Hispanics
#1	Toyota – Corolla		18.4%	20.0%	10.4%	12.1%	24.2%
#2	Honda - Civic		21.0%	18.6%	15.9%	14.8%	18.3%
#3	Nissan – Sentra		9.1%	11.6%	4.8%	5.7%	29.6%
#4	Chevrolet – Cruze		7.4%	7.5%	9.7%	9.3%	11.8%
#5	Hyundai – Elantra Sedan		6.3%	6.0%	7.9%	7.2%	12.1%
#6	Ford – Focus		6.9%	5.9%	10.5%	9.0%	9.7%
#7	Volkswagen – Jetta		6.6%	5.9%	6.5%	6.1%	14.1%
#8	Mazda – 3		5.1%	3.8%	5.3%	4.2%	13.2%
#9	Toyota – Prius		5.1%	3.3%	9.1%	5.8%	8.4%
#10	Dodge – Dart		--	2.9%	--	4.0%	10.6%



Model Share Among Hispanic Compact

Segment Sales

Compact Segment, 2007 – 1Q CY13



Share Variance
2007 vs. 1Q13

-4.5

Corolla

-0.2

Civic

+3.4

Sentra

+7.5

Cruze

+2.7

Elantra Sedan

Hispanic
Midsize Sales
Volume

224,135

207,284

149,099

163,704

190,636

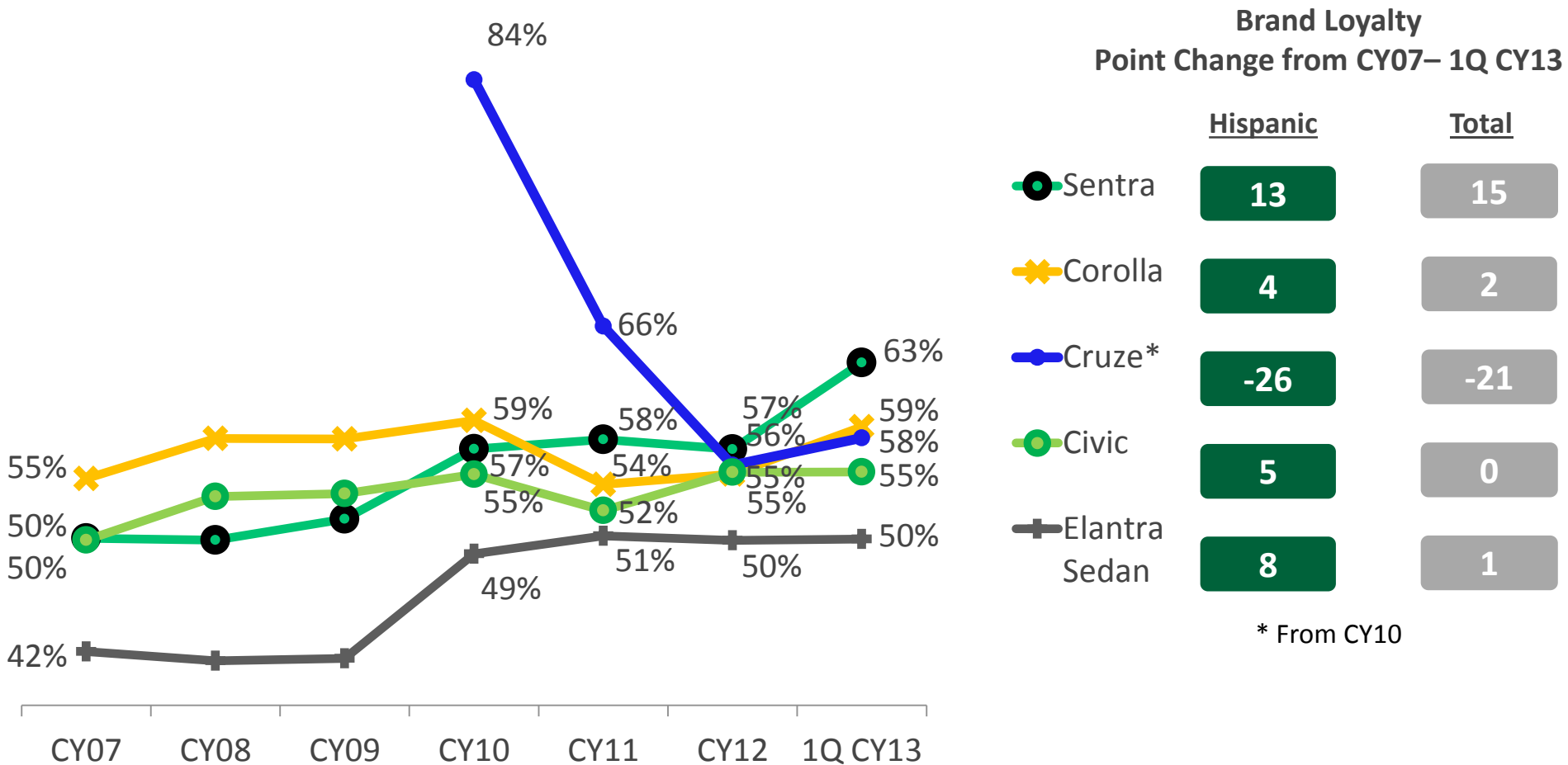
251,759

69,925

Sentra Leads Hispanic Brand Loyalty

Among the Compact Segment

Model Loyalty to Brand



Source: R.L. Polk's Loyalty RTM Database, Total US, EED 2007 – 1Q, CY13. The data only contains and evaluates households in a given time period who are returning to market to purchase a new vehicle (sales and leases). Model Loyalty to Brand customers are customers who previously purchased the target vehicle new and purchased a new model within the same Brand.

Segment Profile

Snapshot of Compact Segment Buyers



	Compact Segment		Toyota Corolla		Honda Civic	
Demographics	Hispanic	Non-Hispanic	Hispanic	Non-Hispanic	Hispanic	Non-Hispanic
Male	55%	48%	46%	48%	57%	46%
College Grad	18%	36%	12%	40%	32%	37%
Employed	67%	66%	60%	55%	61%	70%
Average HHLD Income	\$65K	\$90K	\$55K	\$73K	\$74K	\$88K
Married	48%	53%	45%	54%	56%	47%
Children	51%	31%	43%	45%	51%	26%
Next Vehicle Purchase: New	53%	47%	49%	48%	43%	43%

Younger Hispanic Buyers

**Average Age of Hispanic
Compact Segment Buyer**

48

69% of Hispanic Segment
Buyers are 25-54

**Average Age of Non-Hispanic
Compact Segment Buyer**

52

57% of Non-Hispanic Segment
Buyers are 25-54

Profitable Consumers

Average Amount Spent
on New Compact
Vehicle¹

\$19,700

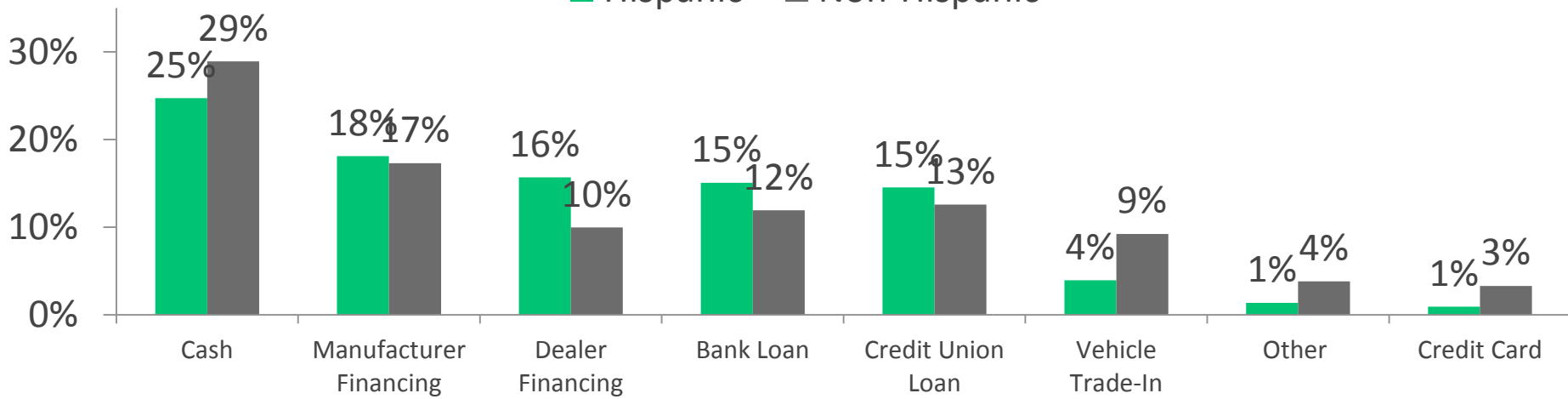
Hispanic

\$21,100

Non-Hispanic

Compact Segment Vehicle Purchase Method²

■ Hispanic ■ Non-Hispanic



Simmons, NCS/NHCS, Fall 2012 Adult Full Year (Oct 11 – Nov 12), U.S.

1)Base: Among new compact vehicle buyers/lessees

2)Base: Most recently acquired compact vehicle owners

It's What we Enjoy

Hobbies and Activities Among New Compact Vehicle Buyers



Buy Tickets to the State Lottery
47% Hispanic / Index 106
45% Non-Hispanic / Index 99



Go to the Movies
73% Hispanic / Index 104
70% Non-Hispanic / Index 99



Gamble at the Local Casino
37% Hispanic / Index 121
30% Non-Hispanic / Index 97



Buy Video Games
26% Hispanic / Index 131
19% Non-Hispanic / Index 96



Play Soccer
24% Hispanic / Index 251
8% Non-Hispanic / Index 81



Visit Theme Parks
42% Hispanic / Index 162
24% Non-Hispanic / Index 92



It's Who we Are

Among Compact Vehicle Owners

“My car should express my personality”

37%
Hispanic Index: 120

of Hispanics agree
Compared to 30% of Non-Hispanics
Non-Hispanic Index: 97

“You can tell a lot about someone by the car they drive”

36%
Hispanic Index: 102











of Hispanics agree
Compared to 35% of Non-Hispanics
Non-Hispanic Index: 100












Source: Simmons NCS/NHCS Fall 2012 Full Year(Oct 11 – Nov 12), U.S.
(Base: Most recently acquired compact vehicle owners); Any Agree

Compact Segment

Future Vehicles, Calendar Year 2013 and 2014

Model		2013	2014
 3		Major Change	
 5			Minor Change
 Beetle		Major Change	
 Civic		Minor Change	
 Corolla			Major Change
 Cruze		Minor Change	Major Change
 Elantra Sedan			Minor Change
 Focus			Minor Change
 Forte		Major Change	
 Golf		Major Change	

Model		2013	2014
 Impreza			Minor Change
 Insight			Major Change
 Jetta		Minor Change	Major Change
 Lancer			Major Change
 Leaf		Major Change	
 Prius			Major Change
 Sentra		Major Change	
 Verano			Minor Change
 Volt		Minor Change	

Source: RL Polk March 2013
 Major Change: Model Renewal, New Version, Important New Engine
 Minor Change: Facelift