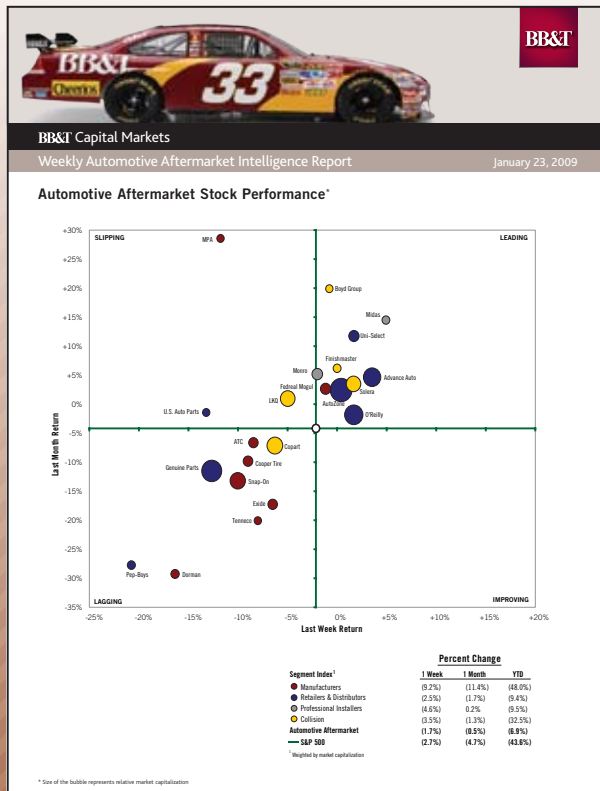


# In Brief: Even Smarter



**Aftermarket Perspectives**

**January 2009**

**Hispanic Market Analysis**  
 The Hispanic demographic can be underrepresented in many consumer panels and surveys, making it difficult to identify shopping trends and brand preferences. However, The NPD Group now can track Hispanic preferences through Store Level point of sale (POS) data. This is done by aggregating sales data into geographies or clusters based on similar store characteristics. Consumer attributes such as demographic and Census information also can be used to group stores with a similar shopper make-up.

**Segmentation Profile**  
 Two thirds of the 18,000 outlets NPD tracks are located in areas that have fewer than 5 percent Hispanic consumers. However, the remaining outlets with a higher percentage of Hispanic shoppers contribute over 40 percent of total retail volume.

**% of Automotive Outlets**

Less than 5% Hispanic	66%
5 to 14.9% Hispanic	13%
15 to 19.9% Hispanic	1%
20 to 29.9% Hispanic	4%
30 to 39.9% Hispanic	1%
40% or More Hispanic	1%

**% of Automotive Dollars**

Less than 5% Hispanic	39%
5 to 14.9% Hispanic	14%
15 to 19.9% Hispanic	1%
20 to 29.9% Hispanic	8%
30 to 39.9% Hispanic	1%
40% or More Hispanic	3%

**More than 2,600** AAIA members have signed up for the *AAIA SmartBrief* since its launch last April, and every Tuesday and Thursday, their inboxes receive a digest of stories not only affecting the aftermarket and the association, but leading national and international news stories, business leadership, sales and marketing and automotive trends as well. And now, the *AAIA SmartBrief* has introduced new sections and features that make it even more valuable than ever.

**Top Story: Aftermarket Financial Analysis**

Every Tuesday, the *AAIA SmartBrief* top story is now the *AAIA/BB&T Weekly Automotive Aftermarket Intelligence Update*. With the uncertainty in today’s financial markets, investors and industry participants are seeking comprehensive and timely information about the automotive aftermarket and the relative performance of the companies serving the industry. In response to these issues, AAIA and

BB&T Capital Markets teamed up to provide this new report, which began with the Jan. 13 issue. The report highlights trends in the automotive aftermarket and further breaks down the industry into four categories based on their primary function in the industry: manufacturers/suppliers; retailers and distributors; service and repair; and collision. Each weekly report is also available in the “Market Research” section of [www.aftermarket.org](http://www.aftermarket.org).

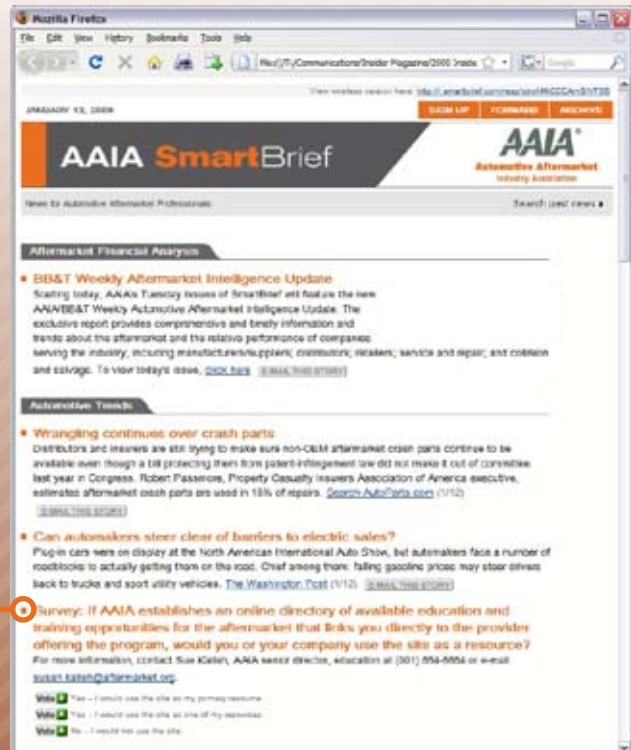
**All in Perspective**

As a new monthly feature, *AAIA SmartBrief* will include *Aftermarket Perspectives*, a new communication from The NPD Group. It delivers insight into current industry trends and examines business issues imperative to aftermarket manufacturers and retailers. Topics covered will include price elasticity and its effect on sales, seasonality differences due to markets’ climates, emerging aftermarket trends, measuring promotional effectiveness, and

■ Survey: If AAIA establishes an online directory of available education and training opportunities for the aftermarket that links you directly to the provider offering the program, would you or your company use the site as a resource?

Vote  Yes - I would use the site as my primary resource.  
 Vote  Yes - I would use the site as one of my resources.  
 Vote  No - I would not use the site.

For more information, contact Sue Kalish, AAIA senior director, education at (301) 654-6664 or e-mail [susan.kalish@aftermarket.org](mailto:susan.kalish@aftermarket.org).



**INDUSTRY INDICATORS - AUTOMOTIVE RETAIL AFTERMARKET REPORT**

U.S. Economy	Values			Change from Same Month of Previous Year			Assessments		
	September	October	November	September	October	November	September	October	November
Consumer Confidence (1985 = 100)	61.4	38.8	44.7	-38.3%	-59.2%	-49.1%	○	○	○
Interest Rates - Prime Rate (Change in points)	5.0%	4.0%	4.0%	-1.0	-1.2	-1.5	○	○	○
Disposable Income (\$ Billion)	\$882.2	\$887.6	\$887.7	5.6%	5.6%	5.2%	○	○	○
Durable Goods - Orders (\$ Billion)	\$23,501	\$19,554	\$17,517	-2.5%	-12.9%	-17.6%	○	○	○
Durable Goods - Shipments (\$ Billion)	\$20,466	\$20,630	\$18,508	0.8%	-5.6%	-11.6%	○	○	○
<b>Consumer Prices</b>									
New Vehicles (1982-84 = 100)	132.4	132.3	132.4	-1.9%	-2.3%	-2.9%	●	●	●
Used Vehicles (1982-84 = 100)	132.9	129.7	126.9	-3.1%	-5.3%	-7.1%	●	●	●
Motor Vehicle Parts & Equipment (1982-84 = 100)	131.0	131.9	132.9	7.2%	7.2%	7.7%	○	○	○
Motor Vehicle Maintenance & Repair (1982-84 = 100)	237.1	238.2	239.0	5.7%	5.9%	5.9%	○	○	○
Gasoline (\$ per gallon)	\$3.75	\$3.11	\$2.20	-11.6%	-9.1%	-29.7%	○	○	○
<b>Producer Prices</b>									
Tires & Repair Materials (1982 = 100)	129.6	134.9	135.0	9.2%	12.7%	11.9%	●	●	●
Motor Vehicle Parts (1982 = 100)	121.0	121.3	121.6	2.3%	2.6%	2.8%	○	○	○
<b>Retail Sales (\$ Millions)</b>									
New Car Dealers	\$44,391	\$79,391	\$54,694	-21.3%	-30.7%	-33.1%	○	○	○
Used Car Dealers	\$6,451	\$6,204	\$5,115	-9.8%	-13.7%	-20.8%	○	○	○
Auto Parts, Accessories & Tire Stores	\$6,521	\$6,902	\$6,198	0.4%	1.6%	0.1%	○	○	○
<b>Aftermarket Employment and Wages</b>									
Aftermarket Employment (Thousands of jobs)	4,266.6	4,270.0	4,146.0	-4.6%	-5.1%	-6.4%	○	○	○
Average Hourly Wage of Parts Store Employees	\$13.25	\$13.45	\$13.35	4.9%	6.5%	4.2%	○	○	○
Average Hourly Wage of Tire Dealer Employees	\$14.93	\$14.75	\$14.55	4.7%	5.7%	5.2%	○	○	○
<b>Automotive Industry</b>									
Miles Driven (Millions)	232,847	233,685	230,403	-4.4%	-3.3%	-3.3%	○	○	○
Passenger Car Sales (Units)	499,129	443,685	373,237	-21.3%	-24.0%	-36.5%	○	○	○
Light Truck Sales (Units)	466,071	394,907	374,307	-31.4%	-39.1%	-36.8%	○	○	○
Total Light Vehicle Sales (Units)	965,160	838,592	747,544	-26.0%	-31.9%	-36.7%	○	○	○

Notes: Historical data have been revised.  
 Released by AAIA on January 19, 2009.  
 Mile Driven data has been revised, January 23, 2009.  
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	September	October	November
Favorable condition for automotive aftermarket = ●	6	5	8
Indeterminate condition for automotive aftermarket = ○	6	5	5
Unfavorable condition for automotive aftermarket = ●	11	11	9
Data not available = na	0	0	0

more. The first edition on the Hispanic demographic ran in the Jan. 29 issue, and can be found at [http://www.npd.com/lps/Auto\\_Brief/](http://www.npd.com/lps/Auto_Brief/)

**Tracking the Trends: AAIA Industry Indicators**

The AAIA Industry Indicators is now featured monthly in the *AAIA SmartBrief*, and is designed to provide insight into some of the key indicators affecting the aftermarket industry and your business. The report is a statistical compilation of key variables that are released by a variety of business and economic sources every month. AAIA's market research department records this data, compares the new data to the same month of previous year, as well as to a given set of statistical parameters, and then identifies the impact to the business as favorable, unfavorable or indeterminate. These monthly reports are also available in the "Market Research" section of [www.aftermarket.org](http://www.aftermarket.org).

**Interact and Feedback**

The *AAIA SmartBrief* will now be periodically featuring surveys as well, offering members the unique opportunity to weigh in on industry trends and best practices, association activities and member benefits. The Jan. 13 issue featured a question about a possible online education database, and future surveys will cover such topics as National Car Care Month participation, meeting evaluations, conference topic discussions/speaker feedback and businesses' responses to the economy. Stay tuned for the chance to participate in these surveys, which help AAIA serve you better.

To sign up for the *AAIA SmartBrief*, visit [www.smartbrief.com/aaia](http://www.smartbrief.com/aaia). ■