

AUSTRALIAN AUTOMOTIVE INTELLIGENCE REPORT

The AUSTRALIAN AUTOMOTIVE INTELLIGENCE REPORT is a strategic tool for companies and organisations involved in the Australian automotive industry. Each issue offers key inputs to business plans and budgets, independent analysis of trends in the Australian automotive market and research on strategic issues of direct relevance to the industry.

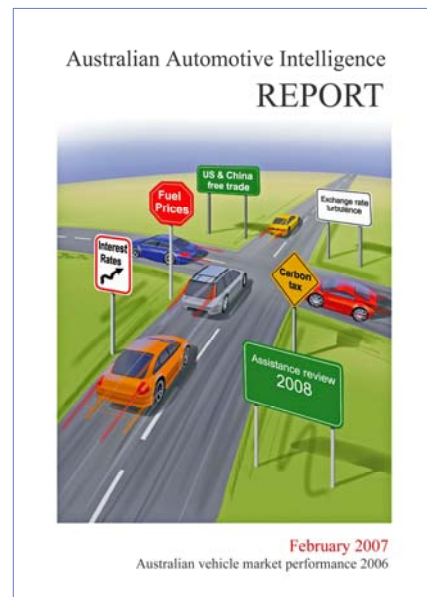
The AUSTRALIAN AUTOMOTIVE INTELLIGENCE REPORT provides:

- independent and authoritative forecasts of the Australian vehicle market
- key economic forecasts for use in business plan and budget preparations
- research and analysis of key automotive policy and market issues
- up to date data and information.

The physical layout of the REPORT has been designed for easy reading by all - the senior executive, the professional specialist and the analyst, with:

- concise business English
- charts alongside corresponding text
- detailed sources and other issues in attachments.

The REPORT is intended as a resource for subscriber companies, providing high quality and professional inputs, and the basis for further analysis if needed. And with our aim of continuously improving our service to subscribers, each issue brings enhancements, new data and added information.



AUSTRALIAN AUTOMOTIVE INTELLIGENCE

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Who is behind the REPORT?

Richard Johns is an economic and business consultant who specialises in work for the Australian automotive industry and in 1993 founded AUSTRALIAN AUTOMOTIVE INTELLIGENCE.

His early employment included working as an economist at the ANZ Bank and the Tariff Board and as a senior lecturer at the David Syme Business School.

In 1983 he joined the personal staff of the then Minister for Industry, John Button, as a policy adviser and played a key role in the development of the "Button Plan" and the mid-term review of the plan.

After joining Nissan Australia, he became Director of Corporate Planning, carrying responsibility for policy, economic advice and market forecasting.

For two decades, Richard has had a "hands on" role within the industry and is widely known through participation in industry and other forums.

The economic and automotive forecasts of the REPORT are supported by the economic expertise and modelling of the National Institute of Economic and Industry Research.

The NIEIR was founded in 1984 when a team of economists left Melbourne University to work in the open market. Dr Peter Brain, Executive Director of the Institute, was a leader of that move.

Peter Brain is well known both in the automotive industry and business generally. He and the NIEIR are known for the quality of their work and their willingness to question conventional wisdom. The Institute has a long history of work on manufacturing and automotive industry issues.

AUSTRALIAN AUTOMOTIVE INTELLIGENCE engages a range of other consultants who are contracted for work on the REPORT and special projects.



Richard Johns
AAI Principal

A deep knowledge of the Australian market and industry, an ability to see Australia's industry in a global context, as well as long experience in forecasting and a talent for commentary sets AAI apart.

Publication cycle

The AAI REPORT is published six times a year. The structure of each issue is outlined below, providing a glimpse of the different aspects of the automotive industry featured in each issue and the scope of coverage achieved over the year.

Automotive Probe studies are undertaken and presented in several issues throughout the year with the June issue being dedicated to 2 or 3 in depth studies. A list of Automotive Probe and Data studies included in the REPORT in recent years appears on the following page.

SECTIONS

ISSUE	Market Review	Economic Forecasts	Automotive Forecasts		Automotive Probe	Data Review	Diary
Feb	Full review of past year, including major factors impacting on market	Updated table	Updated table - Australian market forecasts		Occasional study	The data review appears in all issues, with sections being updated as new data becomes available. Coverage includes: <ul style="list-style-type: none"> prices and exchange rates vehicle finance used vehicle sales vehicle theft seasonally adjusted sales best vehicle awards automotive industry financial performance annual data including R&D and motor vehicle usage 	The Australian automotive diary is in every issue and includes: <ul style="list-style-type: none"> industry news for the preceding 2 months listing of new models and changes details of key reports and conferences planner diary of coming events
Apr		Full set of 5 year forecasts with text and charts	Australian and state market - comprehensive 5 year forecasts				
Jun					Typically 2 or 3 studies including annual review of dealer conglomerates		
Aug	Review of first half of year	Updated table	Updated table - Australian market forecasts	Automotive export outlook	Occasional study		
Oct		Full set of 5 year forecasts - extended a further year	Australian and state market - comprehensive 5 year forecasts - extended a further year				
Dec				Australian vehicle parc analysis and 5 year forecasts	Occasional study		
				CSM world production 5 year forecasts			

Automotive Probe Studies

Automotive Probe studies delve into issues of special interest to the industry. Major studies canvas and evaluate issues in detail, while the data studies are a presentation of data, providing new perspectives but with limited analysis.

Data studies:

International trade in used cars	June 2005
Vehicle leasing	June 2005
Seasonal adjustment and GST	June 2003
Donations to political parties	June 2003
Motor vehicle theft	June 2003
Trading days and seasonal adjustment	December 1998 & June 2003
Motor vehicle usage	February 1997, October 2001 & June 2003

Major studies and discussions:

Population projections	December 2008
The marque finance companies	June 2008
Ageing and attrition of key models	June 2008
Dealer conglomerates - growth and profitability	June 2008
Earnings distribution and car prices	June 2007
Automotive trade exchange rate	June 2006
Changing fuel types	June 2006
The automotive aftermarket	June 2005
Automotive industry R&D	December 2004
Industry profitability 2003	December 2004
CPI transport indexes	December 2004
Holden and Ford	June 2004
French marques in Australia	December 2003
Regional vehicle sales	June 2003
Workplace agreements	June 2003
Suzuki in Australia	December 2002
HCV assemblers and importers	August 2002
Automotive industry policy review	June 2002
Nissan in Australia	December 2001
Small business and new vehicle sales	August 2001
Australian car makers - a decade of change	June 2001
Transition in automotive policy provisions	February 2001
Profit series for Australian light vehicle importers	February 2001
Inchcape Motors in Australia	December 2000
The internet and the automotive industry	June, August & December 2000
Holden and General Motors in Australia	June 2000
What affects luxury car sales	February 2000
Mazda in Australia	December 1999
New car price shocks and used car values	August 1999
The review of the motor vehicle standards Act	June 1999
Toyota in Australia	June 1999
Component maker profitability - a new index	June 1999
Used vehicle sales in Australia	February 1999 & December 1999
Honda in Australia	December 1998
Ford in Australia	June 1998
Financial performance - automotive financiers	June 1996

What is included in a subscription package?

The following is a breakdown of the components that make up a Standard Subscription Package

THE REPORT

- The REPORT is issued 6 times each year.
- It is published in February, April, June, August, October, December.
- Both hard copy and soft copy (PDF file on CD) formats are available.
- The average REPORT is approximately 100 pages in length and is divided into sections that vary from issue to issue but include:
 - * Automotive Market Review
 - * The Economic Outlook - 5 year forecasts
 - * Australian Automotive Market Forecast - 5 year forecasts
 - * Economy & Automotive Market Forecast updates
 - * Automotive Probe Studies
 - * Vehicle Parc Forecasts
 - * Data Review (all issues)
 - * Australian Automotive Diary (all issues)
- A standard annual subscription includes 2 copies of each issue of The REPORT.

THE YEARBOOK

- The YEARBOOK is published around March/April each year.
- Both hard copy and soft copy (PDF file on CD) formats are available.
- The YEARBOOK is approximately 300 pages in length and is divided into sections:
 - * Key Data
 - * Australian Car Manufacturers
 - * Light Vehicle Importers
 - * HCV Assemblers & Importers
 - * Australian Component Manufacturers
- A standard annual subscription includes one copy of The YEARBOOK.

VFACTS

- VFACTS sales data, seasonally adjusted by AAI, is emailed to the primary subscription holder monthly.
- In addition, a small number of other employees of the subscribing organisation may be nominated to receive this email.
- A standard annual subscription includes one email per month to nominated recipients.

FORECAST BRIEFINGS

- Informal Forecasting Briefings are held in April and October each year in both Melbourne and Sydney.
- The Briefings are presented by Richard Johns, principal of AAI and noted economist and automotive industry specialist.
- Attendance for two persons from the subscribing organisation at each Briefing is included in the standard annual subscription. These Briefing invitations are transferrable within the subscribing organisation and depending on attendance numbers, additional invitations may be available.

ASSISTANCE WITH DATA ENQUIRIES

- AAI will extend reasonable assistance to subscribing organisation where the organisation is seeking specific data or comment on data. If AAI is not in possession of the data required, it will give guidance on data availability, suitability and sources.
- AAI can also undertake commissioned work - relationships with subscribers usually enable this type of work to be structured in a way that provides substantial savings.

DISCOUNTS ON ADDITIONAL OR REPLACEMENT COPIES

- Subscribers or individuals from subscribing organisations are eligible to receive discounts of up to 50% on the YEARBOOK when copies, additional to those received as part of the subscription package, are requested. Additional copies of the REPORT are available at low cost.

EXPRESS MAIL SERVICE

- For Australian subscribers, Australia Post Express Post satchels are used to dispatch each issue of The REPORT and the annual YEARBOOK. This allows items to reach subscribers quickly and provides tracking facilities should an item not reach its destination.
- For international subscribers, Australia Post Express Courier International satchels are used. This service provides both security and traceability for dispatched items.

Tailor your own Subscription Package

On the previous two pages, we have outlined the components that make up a standard annual subscription package.

However, from time to time an organisation will adjust or tailor this package to better suit its needs.

AAI is able to be flexible with the arrangement of subscription components and negotiates package structure and thus pricing on an organisation by organisation basis.

For example, among current subscribers, some require:

- Only 1 copy of each REPORT (the standard is 2)
- 6 copies of each REPORT
- 2 copies or more of the YEARBOOK (the standard is 1)

Some current subscribers have established subscription add-ons:

- specific data emailed monthly
- used car sales figures emailed bi-monthly
- private briefings held at the subscriber organisation's location.

AAI's primary aim is to provide a relevant and cost-effective service to subscribers. To this end, AAI is always open to discussion to create the best possible package for a subscriber.

In summary

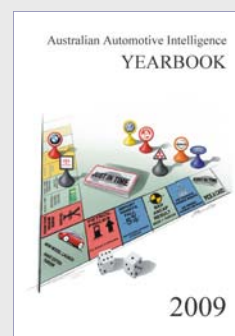
The AUSTRALIAN AUTOMOTIVE INTELLIGENCE **REPORT** standard subscription package comprises:

- * 2 copies of each of 6 issues a year – February, April, June, August, October, December
- * 1 copy of the AUSTRALIAN AUTOMOTIVE INTELLIGENCE **YEARBOOK**
- * invitations to Forecasting Seminars held in April and October each year
- * seasonally adjusted vehicle sales data emailed monthly
- * reasonable assistance with data and information from our resources
- * express mail service to all subscribers

This subscription package is priced at AUD \$4,900

(plus \$ 490 GST for Australian purchasers or \$490 international postage for international purchasers).

Subscription packages can be tailored to suit your needs or the needs of your organisation. Visit our website for more information or contact us to discuss how we can best assist you.



The subscription and you

The PRIMARY CONTACT

For each subscription, one person is nominated as the Primary Contact. This person is the first point of contact for AAI should there be any queries related to the management of the subscription.

In addition, all materials pertaining to the subscription including publications, invoices and all correspondence are sent to the Primary Contact. It is possible to nominate secondary recipients for copies of publications, VFACTS emails or Briefing invitations. For example, one copy of The REPORT may be sent to the Primary Contact and the second copy can be sent to a colleague in another department or location.

The SUBSCRIPTION FEE

A fee is charged on commencement of an annual subscription.

- This fee covers the provision of services for the duration of one year from the date of the invoice
- The invoice is required to be paid within 30 days
- The subscription is renewable annually with a renewal invoice issued 30 days before the subscription is due to expire
- The invoice is sent to the subscription's Primary Contact

The fee for a Standard Subscription Package as at February 2009 is AUD \$4,900 + AUD \$490 GST = AUD \$5390.

For international purchasers, the total fee is AUD \$5390 which includes international postage.

The fee for specially tailored packages is negotiated between AAI and the subscribing organisation on a case by case basis.

A subscription is deemed to be continuing unless AAI is advised otherwise by the Primary Contact, before the renewal payment is due.

CANCELLING OR SUSPENDING A SUBSCRIPTION

A subscriber may cancel a subscription at any time. This cancellation advice is required to be received by AAI in writing within 30 days of the date of the renewal invoice.

AAI requires full payment of fees before a subscription can continue. Where a fee is unpaid, AAI reserves the right to delay provision of subscription items until full fees have been received.

PRIVACY

Australian Automotive Intelligence is an independent consultancy with no associations that require it to share any information pertaining to subscribers.

AAI will not sell, give away or in any other way disseminate subscriber details including email addresses or other contact information. AAI will only ever use this information for the purpose it was provided.

The privacy of our clients is of supreme importance to AAI.

Please see the Terms & Conditions following for more details about the Publication cycle, usage, renewal and subscription alterations.

AAI REPORT

SUBSCRIPTION TERMS & CONDITIONS

Publication

The AUSTRALIAN AUTOMOTIVE INTELLIGENCE REPORT is published six times a year and unless otherwise stated a subscription covers six regular issues. Supplementary issues are published in exceptional circumstances, for instance if unforeseen circumstances arise that have a significant impact on the preceding forecasts.

The six issues of the AAI REPORT are published and sent to subscribers in February, April, June, August, October and December of each year. If circumstances cause any issue to be significantly delayed, AAI will advise. Should it not be possible to publish 6 issues in any 12 month period, then the period of subscription will be extended to cover 6 issues, or scheduled work will be included in the remaining issues, or the subscription will be refunded on a pro rata basis, at the discretion of Australian Automotive Intelligence.

As part of a subscription you will be provided with a copy of each AUSTRALIAN AUTOMOTIVE INTELLIGENCE YEARBOOK, monthly email updates of seasonally adjusted vehicle sales data and occasional other information. Reasonable assistance is available to subscribers from our resources, including electronic copies of published charts for use in reports and presentations.

Usage

This subscription covers the use of the AAI REPORT, the AAI YEARBOOK and any other material supplied by Australian Automotive Intelligence, within the subscribing organisation and by employees undertaking their duties for that organisation. Permission should be sought for use of AAI material in publications or other external mediums – in such cases use of our material should be acknowledged. Usage of electronic copies of publications and information supplied by Australian Automotive Intelligence is subject to the same conditions as hard copies, unless otherwise agreed.

Renewal

Renewal invoices will be sent following despatch of the last issue covered by a subscription. In order to ensure subscribers have access to the latest issue of the AAI REPORT, we will assume the subscription is to be continued unless notice of discontinuation is provided in writing within 30 days of the date of the renewal invoice.

Subscription Amendment

It is possible to change the characteristics of your subscription at any time. Please contact AAI with requests to alter the number of copies to be received, change of address or change of nominated recipient. In order to ensure that we can promptly and accurately effect any amendments, please confirm all requests for change in writing.

AUSTRALIAN AUTOMOTIVE INTELLIGENCE

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Australian Automotive Intelligence REPORT SUBSCRIPTION REQUEST FORM



Please complete and fax back to 61 3 9867 5955

CONTACT & MAILING DETAILS

Name: Date:

Job Title: Order Number: (if applicable)

Company:

Address: Tel:

..... Fax:

.....

.....

Email: (required)

The person named here will be the primary contact for this subscription and the recipient of all accompanying correspondence, materials and invoices.

Please contact AAI to advice of changes to the primary subscription contact.

SUBSCRIPTION DETAILS

I wish to commence a subscription to the Australian Automotive Intelligence REPORT, with my 12 month subscription to begin with issue: (please tick the appropriate month) February April June August October December

Please select your subscription package (note that all prices quoted are in Australian dollars)

STANDARD PACKAGE

- **TWO** copies of each issue of REPORT
Select either: 2 hard copies or
- 1 hard copy & 1 electronic copy (CD)
- one hard copy of YEARBOOK
- seasonally adjusted VFACTS sales data emailed monthly
- one attendance at Forecasting Seminars held in April and October
- reasonable assistance with data enquiries
- discounts on additional copies of the REPORT and YEARBOOK
- express mail service

Subscription Fee:
\$4900 plus \$490 GST - TOTAL \$5390 (✓)
(includes postage and handling)

For international purchasers, the total fee is AUD \$5390 which includes international postage.

SINGLE PACKAGE

- **ONE** copy of each issue of REPORT
Please select - hard copy or electronic copy (CD)
- one hard copy of YEARBOOK
- seasonally adjusted VFACTS sales data emailed monthly
- one attendance at Forecasting Seminars held in April and October
- reasonable assistance with data enquiries
- discounts on additional copies of the REPORT and YEARBOOK
- express mail service

Subscription Fee:
\$4700 plus \$470 GST - TOTAL \$5170 (✓)
(includes postage and handling)

For international purchasers, the total fee is AUD \$5170 which includes international postage.

Tailored Subscriptions

AAI is able to tailor subscription packages to accommodate the specific needs of your organisation. Contact AAI to discuss the inclusions you require.

International Subscribers

The TOTAL fees for subscriptions quoted above apply to international subscribers – these subscriptions include express courier delivery over the 12 month subscription period.

I understand that an invoice will be sent after this Subscription Request is received.

Signed by Subscriber