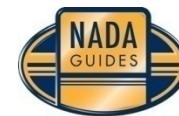


# Guidelines

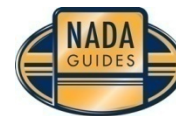
## NADAguides Motorcycle & ATV Industry Update

July-August 2013



# Industry Overview

*Many dealers' expectations for summer sales fall short...*



## Industry Overview...

As summer comes to a close, dealers are stating that sales have been extremely close between the Sport, Touring, and Utility segments of the market. Dealers believe sales have been split evenly through each segment of the market, and that no single type of Motorcycle or ATV is taking a larger control of market share than another.

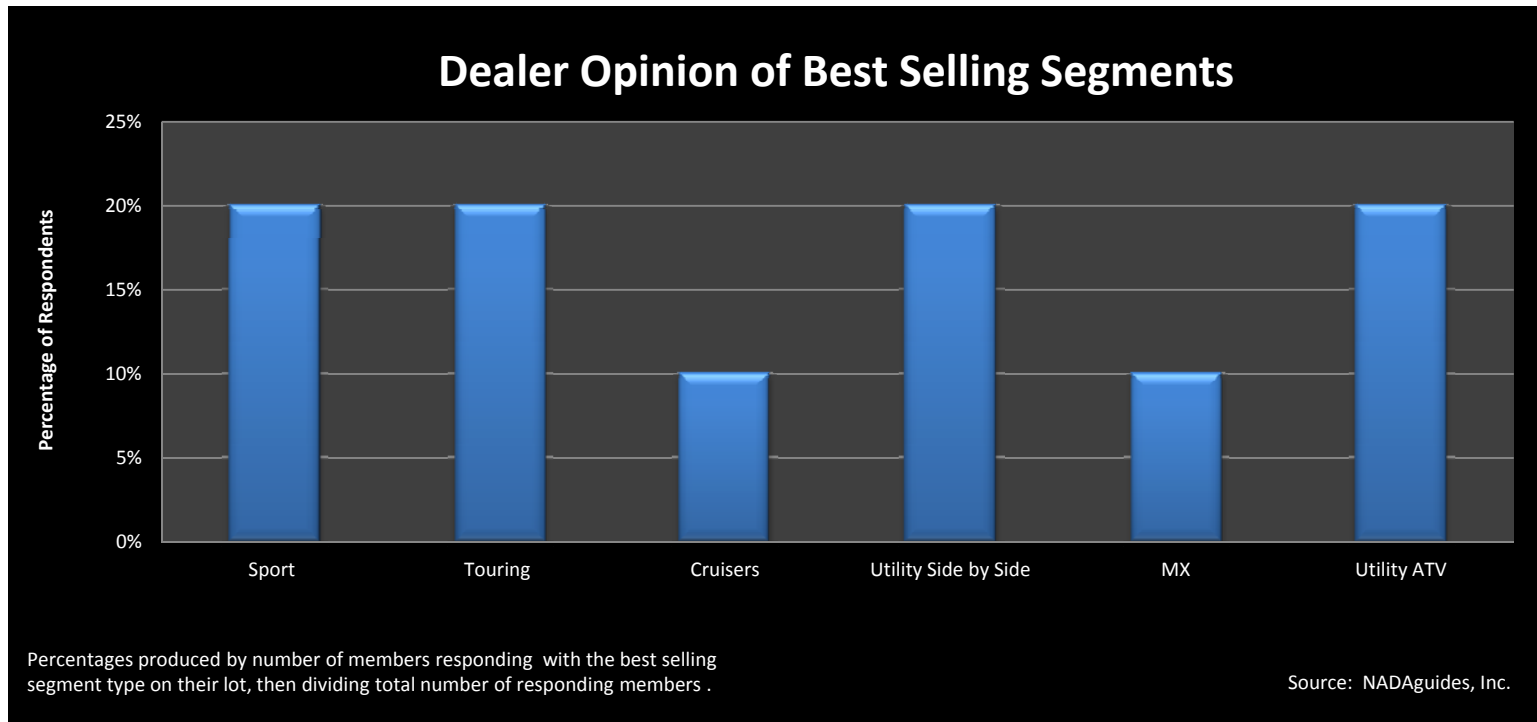
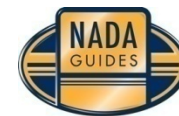


Figure 1.1



The Power of Vehicle Information

## Industry Overview...

As reports of improving economic conditions continue, dealers were surveyed to find if sales on their lots this summer were better than summer of 2012. Contradicting many positive economic reports, 34% of dealers report that 2013 sales are worse than 2012. 50% indicate that 2013 has been about the same as 2012; while only 16% report that 2013 has been better than 2012.

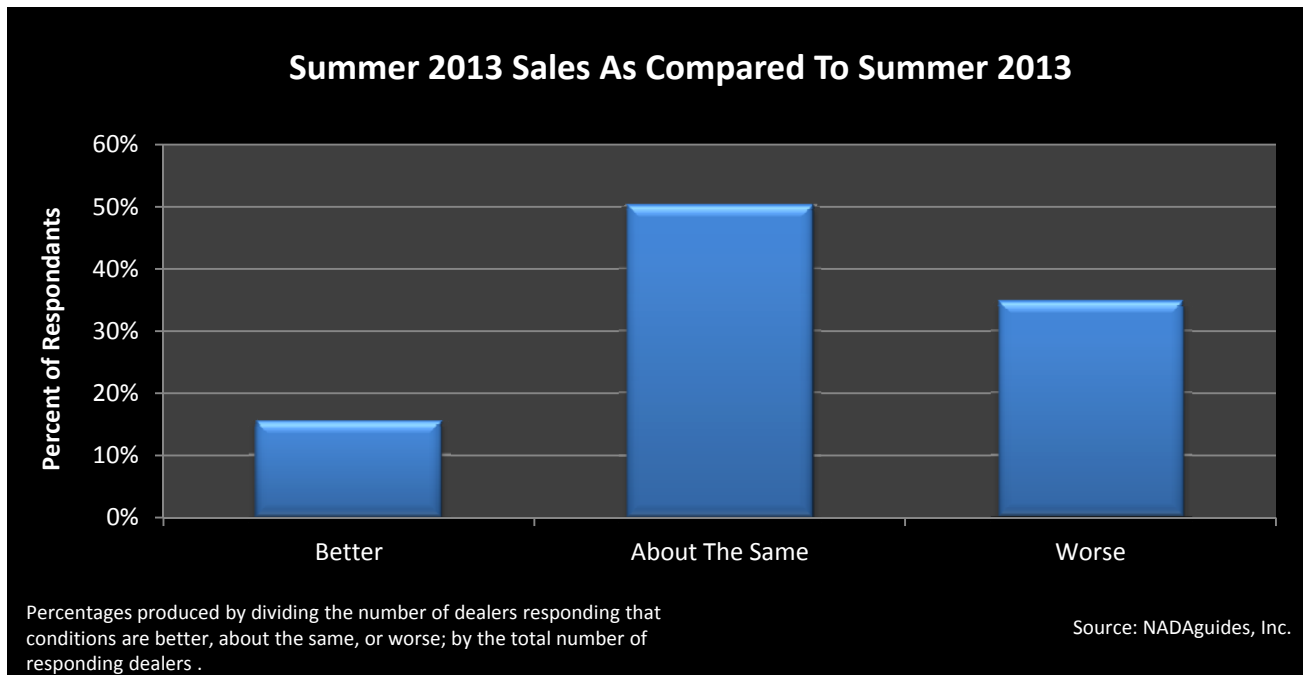
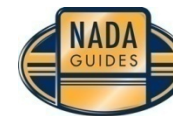


Figure 1.2



The Power of Vehicle Information

## Industry Overview...

Many dealers have expressed difficulty in obtaining used units over the last few years due to a higher consumer demand and limited production during 2010 and 2011. When questioned about whether used units were still as difficult to obtain as they have been in the recent past, a majority of dealers feel that the availability of used units is about the same. 23% feel it is more difficult, while 15% feel it is easier to obtain used units than in previous years.

A similar question was asked in January of 2013. At that time, 40% of dealers responded that used units were more difficult than in previous years to obtain. This change indicates an increased interest in new model year bikes being sold.

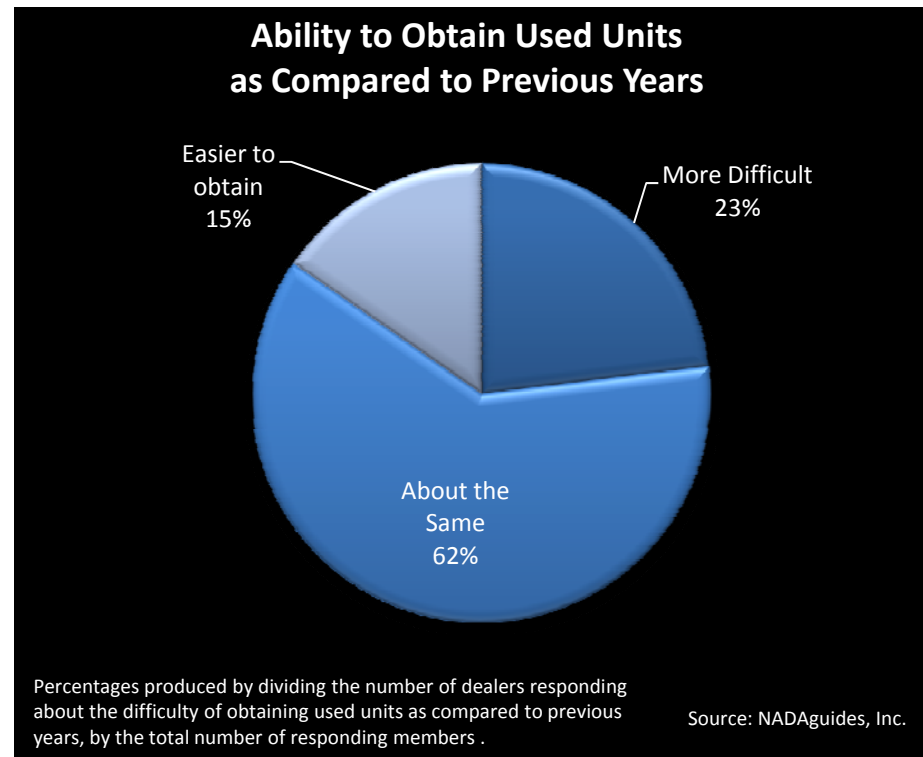
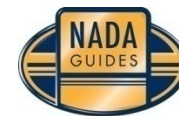
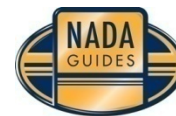


Figure 1.3



The Power of Vehicle Information

# NADAguides Data Overview



## Data Overview...

The surveyed dealers weighed in on current NADAguides Powersports Rough Trade-In values. The charts shown in Figures 1.5 will reflect segments of the industry, based on if values were too low, about right, or too high, as compared to their local market area.

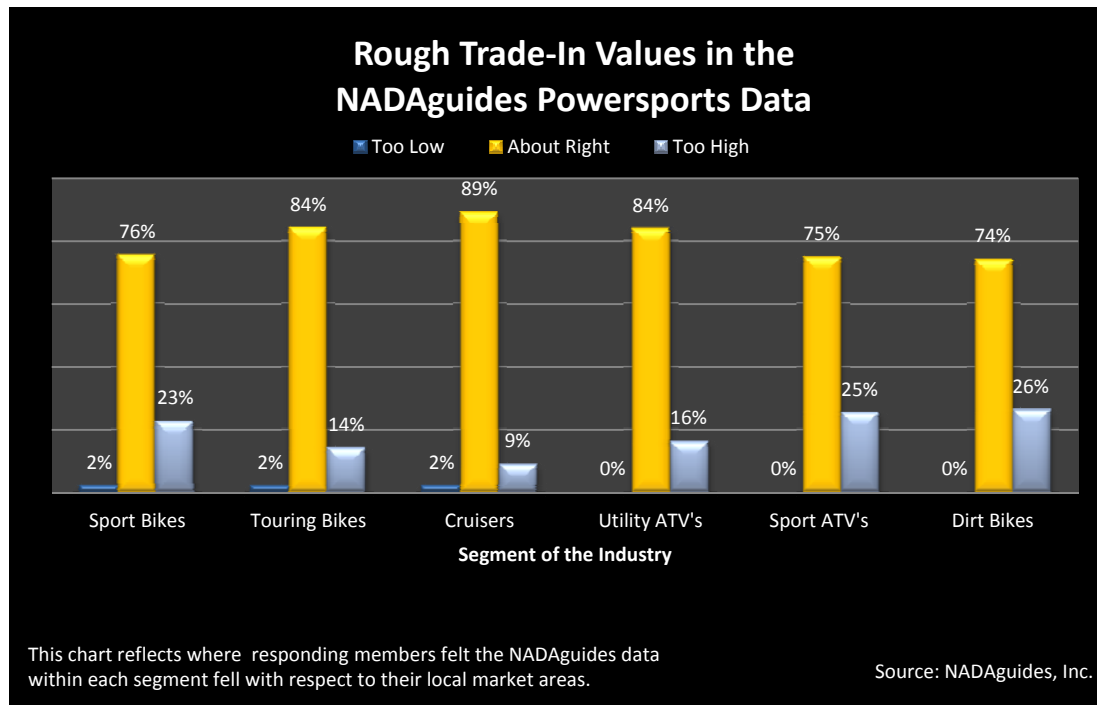
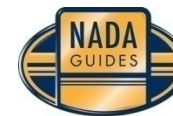


Figure 1.5



The Power of Vehicle Information

## Data Overview...

The surveyed dealers weighed in on current NADAguides Powersports Clean Trade-In values. The charts shown in Figures 1.6 will reflect segments of the industry, based on if values were too low, about right, or too high, as compared to their local market area.

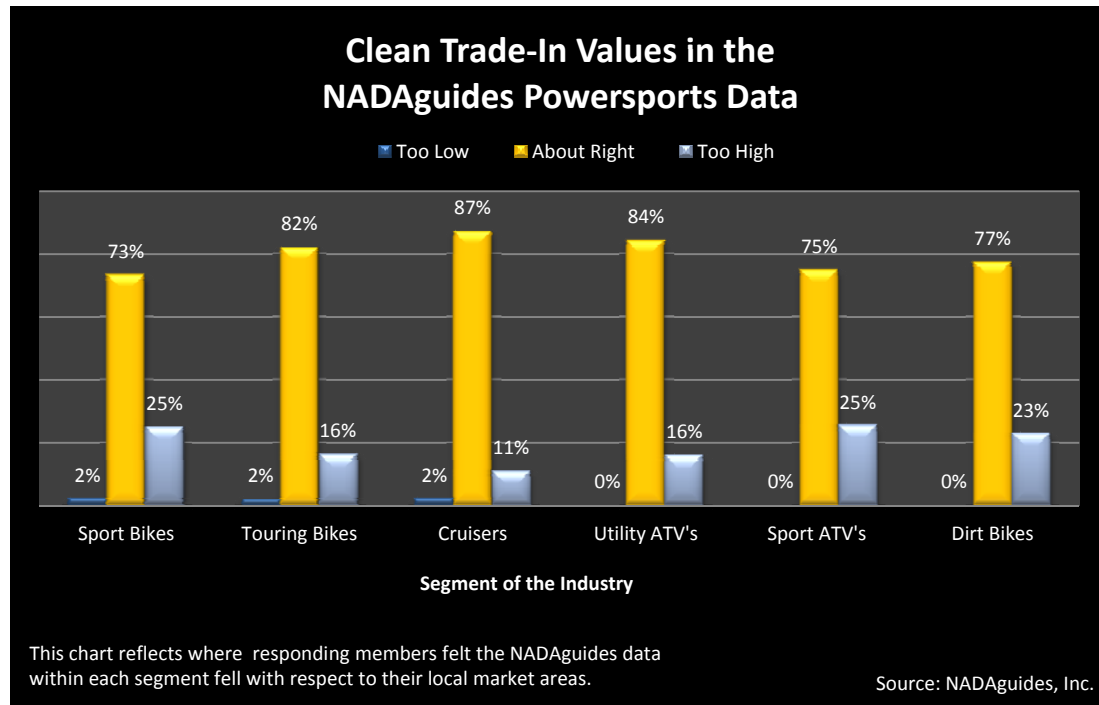
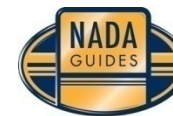


Figure 1.6



The Power of Vehicle Information



## Data Overview...

The surveyed dealers weighed in on current NADAguides Powersports Average Retail values. The charts shown in Figures 1.7 will reflect segments of the industry, based on if values were too low, about right, or too high, as compared to their local market area.

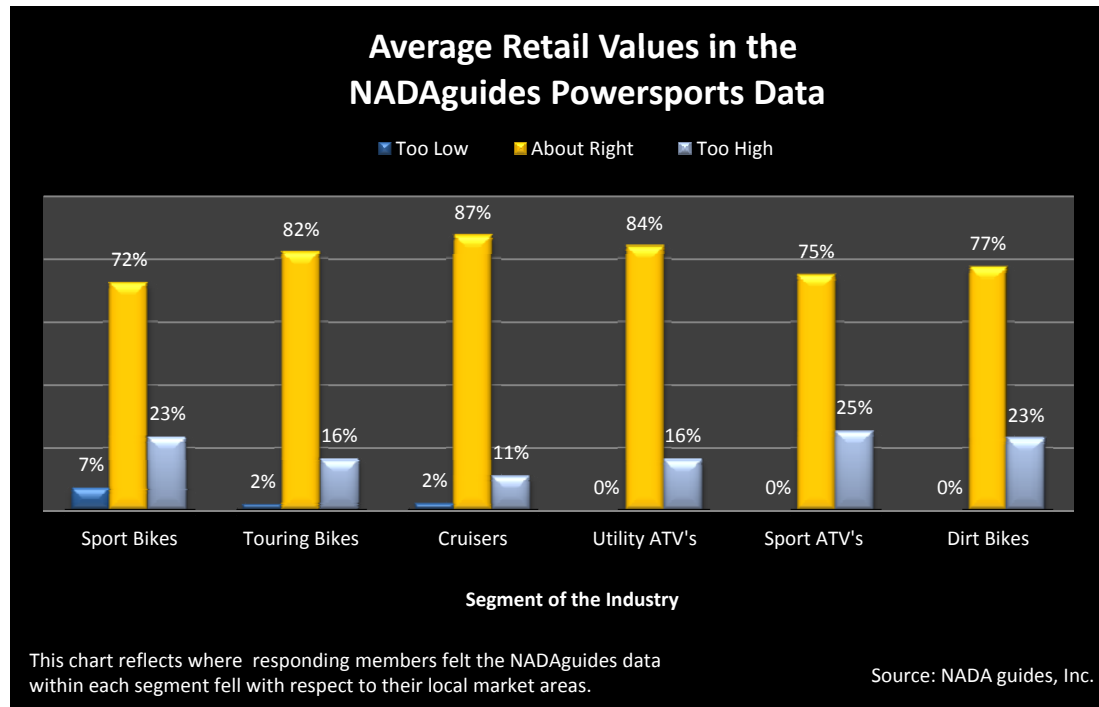
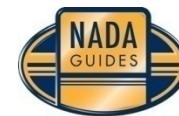
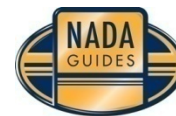


Figure 1.7

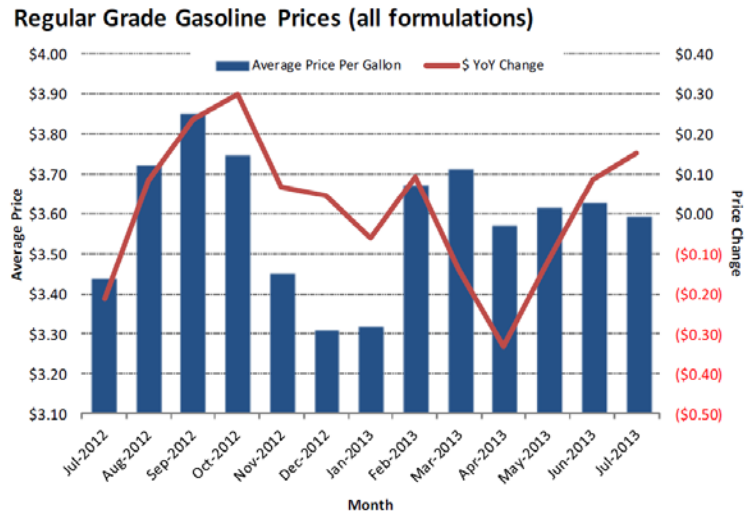


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# Outside Influences



# Fuel Prices



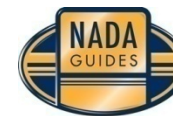
Source: EIA

**U.S Regular Gasoline Prices (dollars per gallon, all formulations)**

	Jul-13	Jun-13	Jul-12	Change From	
				Month Ago	Year Ago
US	\$3.59	\$3.63	\$3.44	(\$0.03)	\$0.15
East Coast	\$3.56	\$3.50	\$3.41	\$0.07	\$0.15
Midwest	\$3.54	\$3.75	\$3.44	(\$0.21)	\$0.10
Gulf Coast	\$3.41	\$3.36	\$3.22	\$0.05	\$0.19
Rocky Mountain	\$3.62	\$3.70	\$3.52	(\$0.08)	\$0.10
West Coast	\$3.92	\$3.90	\$3.70	\$0.01	\$0.22

Source: EIA

A view of the national average gas price and regional year over year change over the last year, is supplied to provide support to longer-term strategic planning.

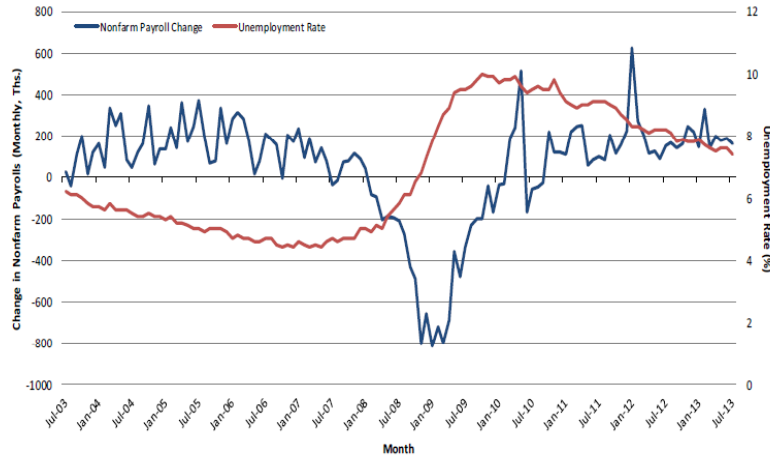


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# Economic Drivers

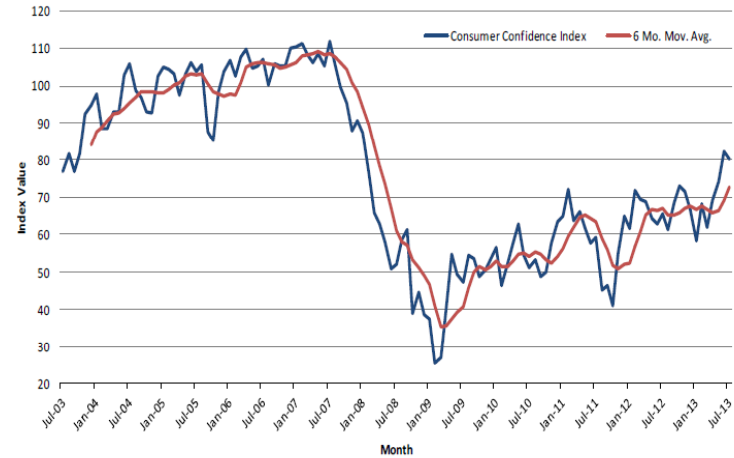
## Employment

Total Nonfarm Payrolls & Unemployment Rate, SA



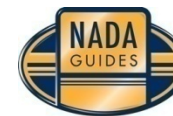
Source: BLS

## Consumer Confidence Index



Source: The Conference Board

Economic Factors: Two important factors affecting the powersports market today are the unemployment rate and consumer confidence. These factors can be interpreted to represent the consumer’s ability and willingness to make a new or used motorcycle or ATV purchase.



The Power of Vehicle Information

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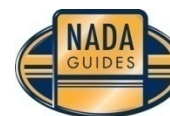
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