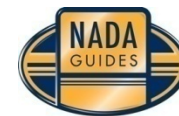


# Guidelines

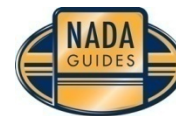
## NADAguides Motorcycle & ATV Industry Update

May – June 2013



# Industry Overview

*Many dealers still haven't turned sales around from the slow winter...*



## Industry Overview...

As we move from spring to summer, on-road motorcycles gain popularity and are anticipated to be the top sellers for most dealers. Figure 1.1 indicates that dealers believe Cruisers will be their best selling segment, with Sport, Touring, and Dirt following close behind.

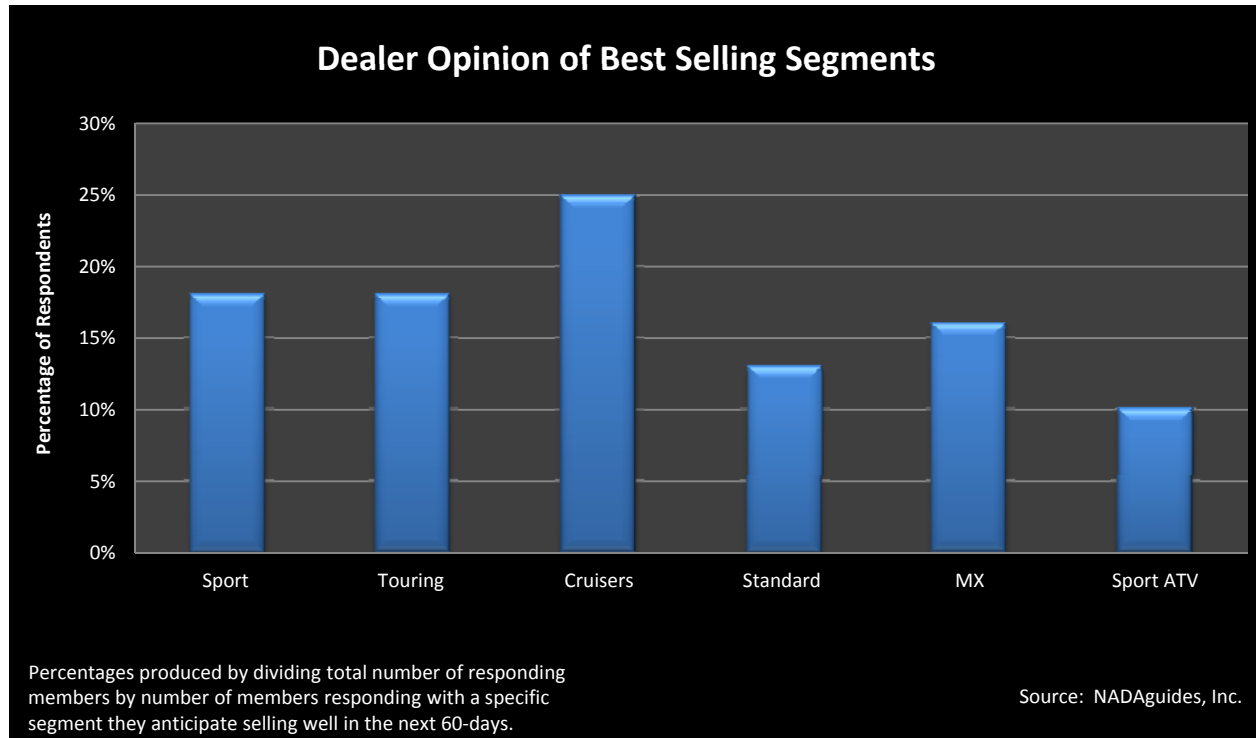
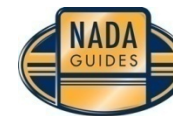


Figure 1.1



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## Industry Overview...

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Figure 1.2 reflects purchases within the last 60 days. 72% of dealers responded that the majority of their sales were new units; whereas, 28% indicated they sold more used units than new. Many qualifying consumers are taking advantage of aggressive incentives offered by OEM's. It has been reported that financing has loosened up and consumers have more faith in the economy.

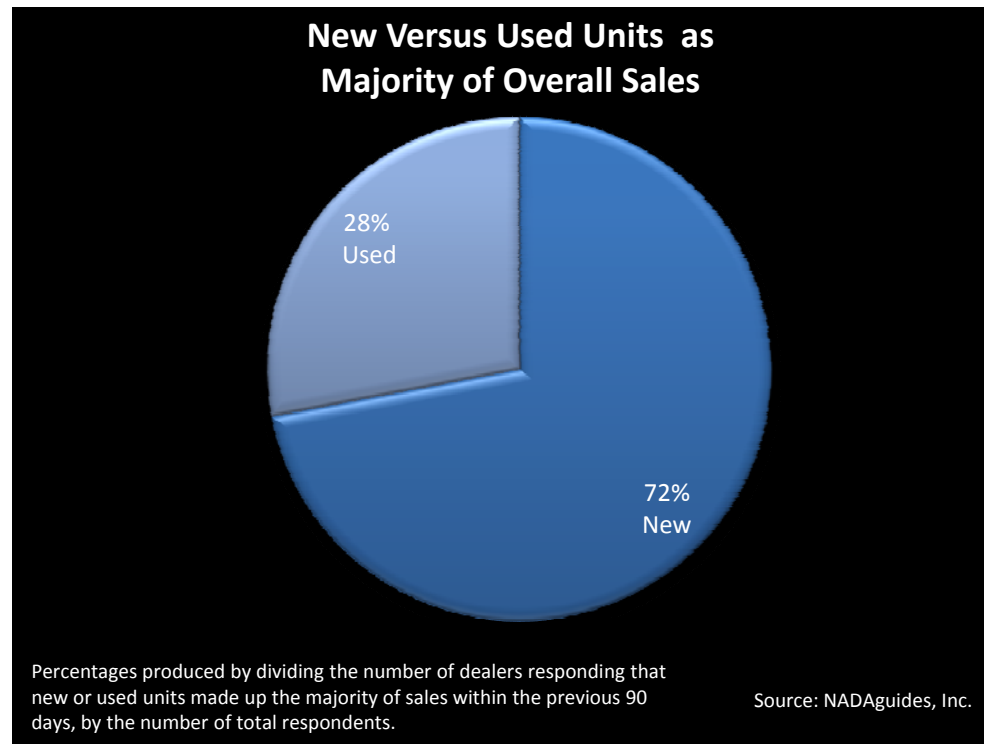
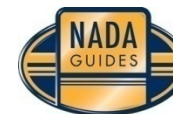


Figure 1.2



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## Industry Overview...

Previously, 60% of dealers believed that sales would be about the same this year as the previous, this has shifted drastically to 32%. Figure 1.3 shows this shift of people who now believe that this selling season has been worse than last year. Based on conversations with dealers, this is due to the late winter and destructive storms experienced in many areas.

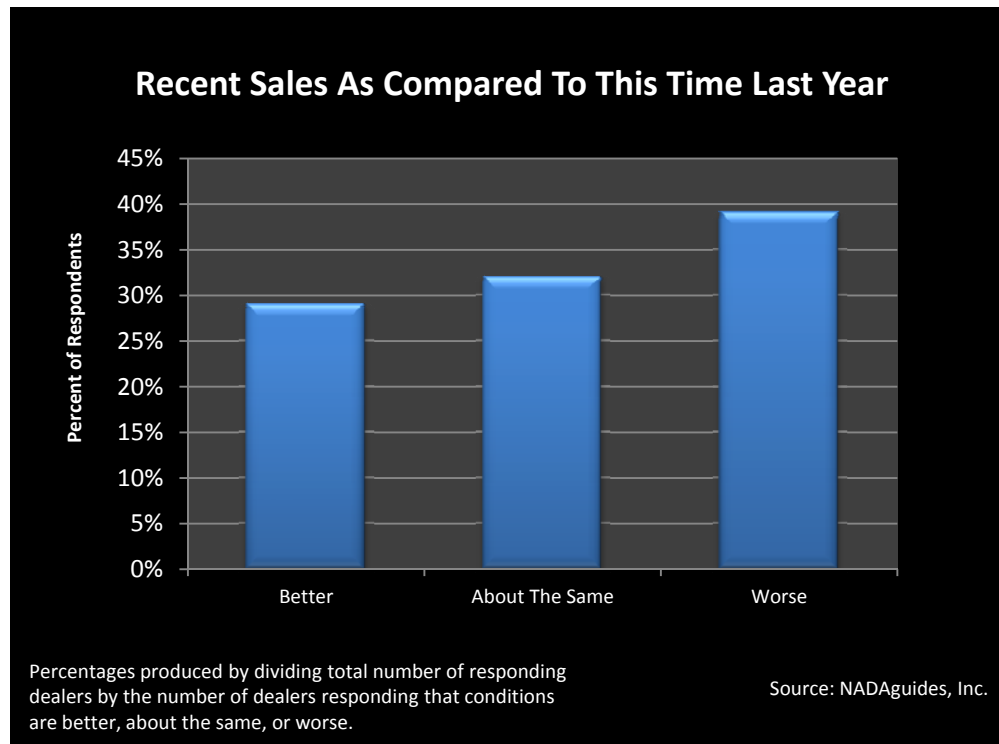
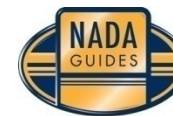
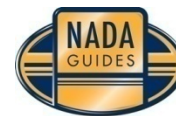


Figure 1.3



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# NADAguides Data Overview



## Data Overview...

The charts shown in Figures 1.5 and 1.6 reflects, by industry segment, where the trade-in values were too low, about right, or too high, as compared to their local market area.

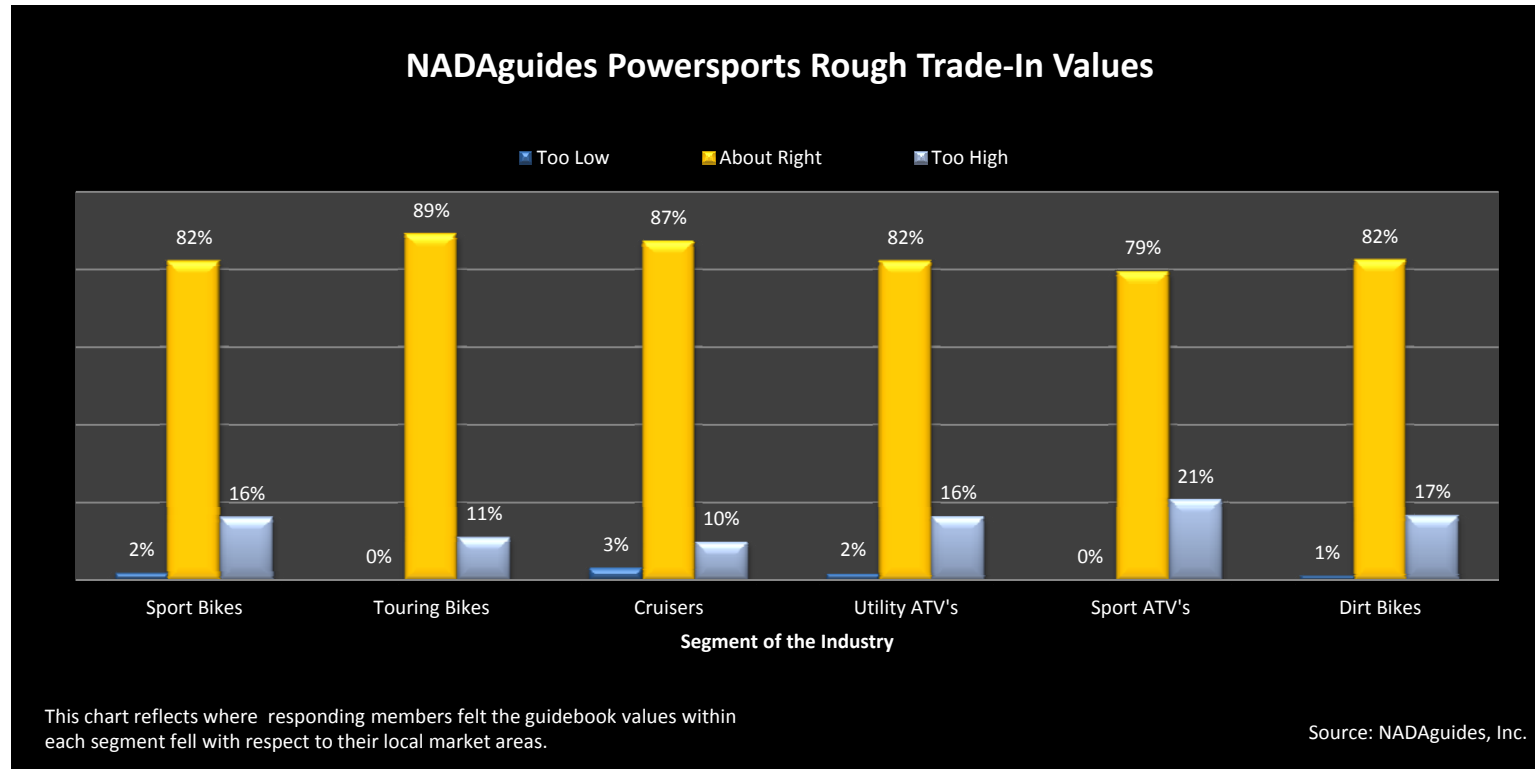
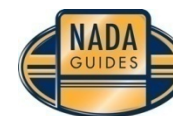


Figure 1.5



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## Data Overview...

The charts shown in Figures 1.5 reflects, by industry segment, where the trade-in values were too low, about right, or too high, as compared to their local market area.

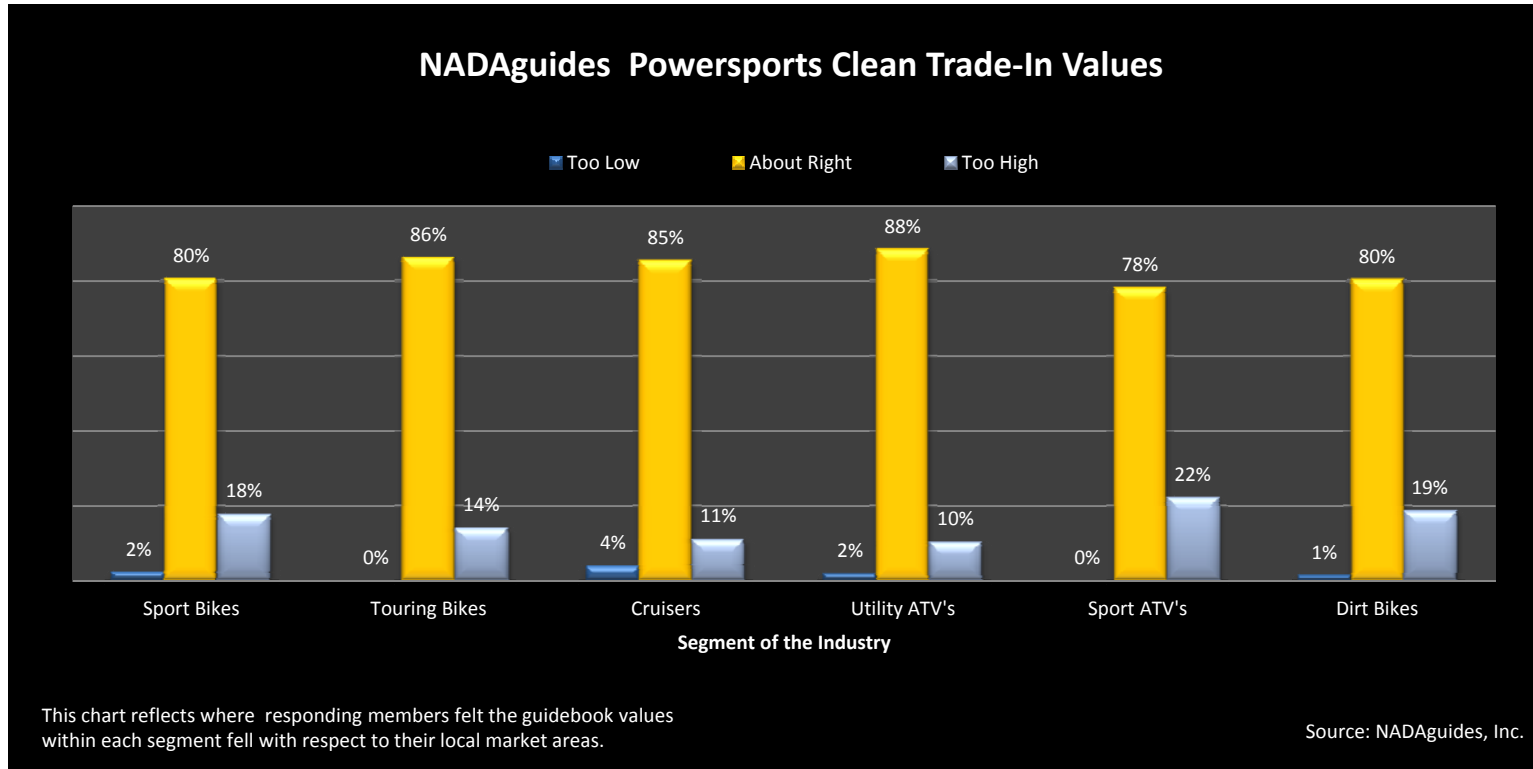
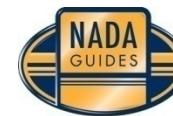


Figure 1.6



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## Data Overview...

The charts shown in Figures 1.7 reflects, by industry segment, where the retail values were too low, about right, or too high, as compared to their local market area.

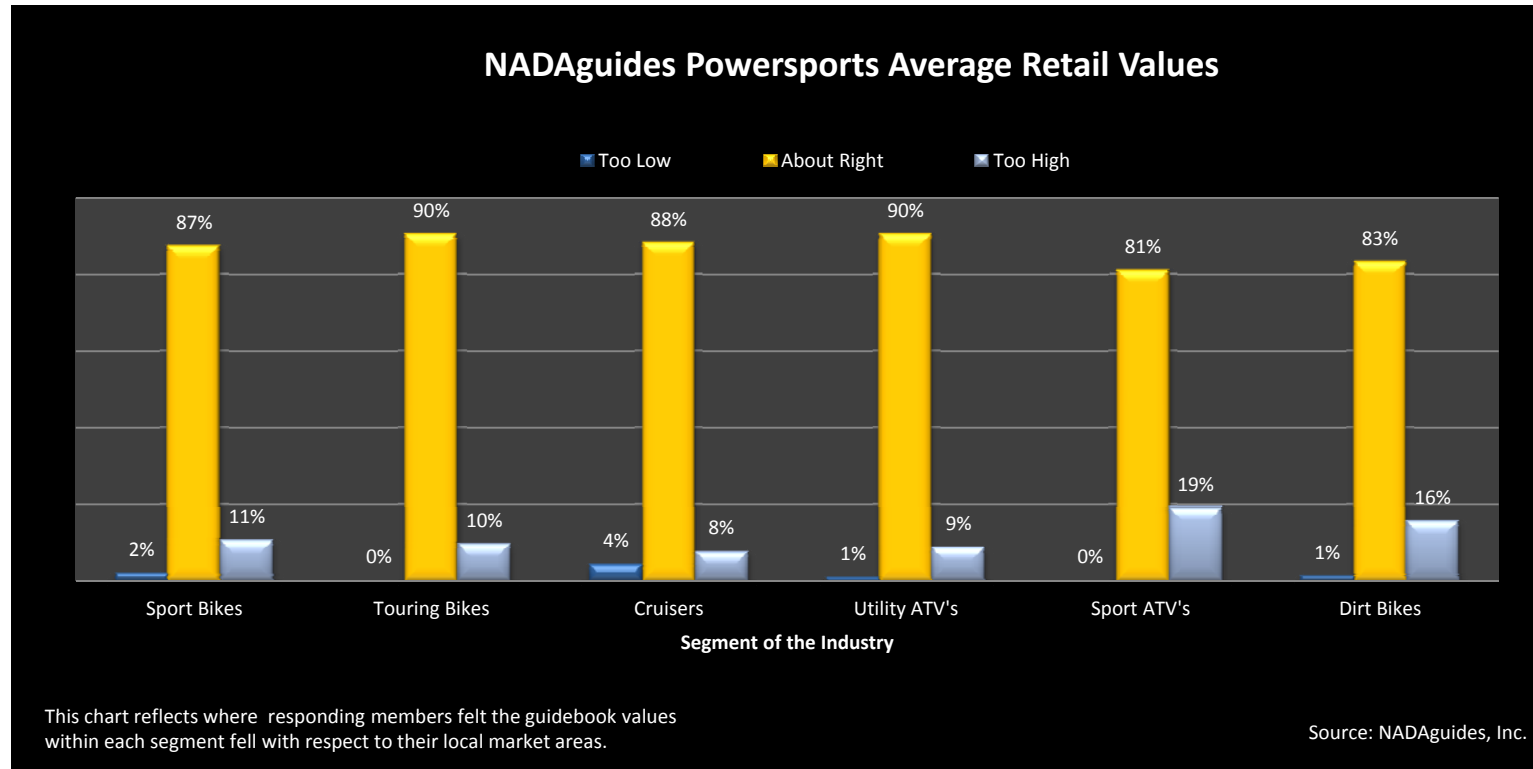
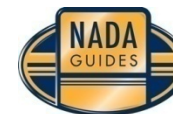
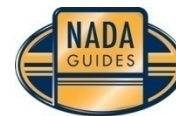


Figure 1.7

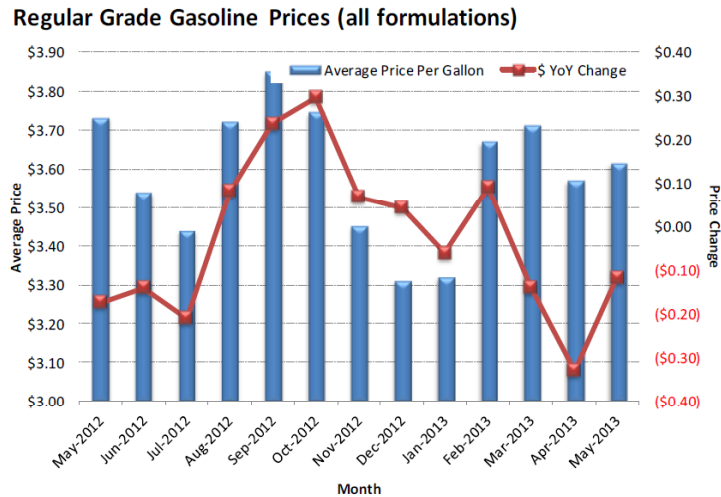


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# Outside Influences



# Fuel Prices



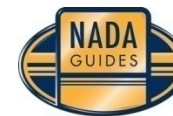
Source: EIA

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

	May-13	Apr-13	May-12	Change From	
				Month Ago	Year Ago
US	\$3.62	\$3.57	\$3.73	● \$0.05	● (\$0.12)
East Coast	\$3.48	\$3.54	\$3.67	● (\$0.05)	● (\$0.19)
Midwest	\$3.73	\$3.54	\$3.65	● \$0.19	● \$0.09
Gulf Coast	\$3.36	\$3.38	\$3.52	● (\$0.02)	● (\$0.17)
Rocky Mountain	\$3.61	\$3.50	\$3.76	● \$0.11	● (\$0.14)
West Coast	\$3.91	\$3.88	\$4.22	● \$0.03	● (\$0.31)

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.

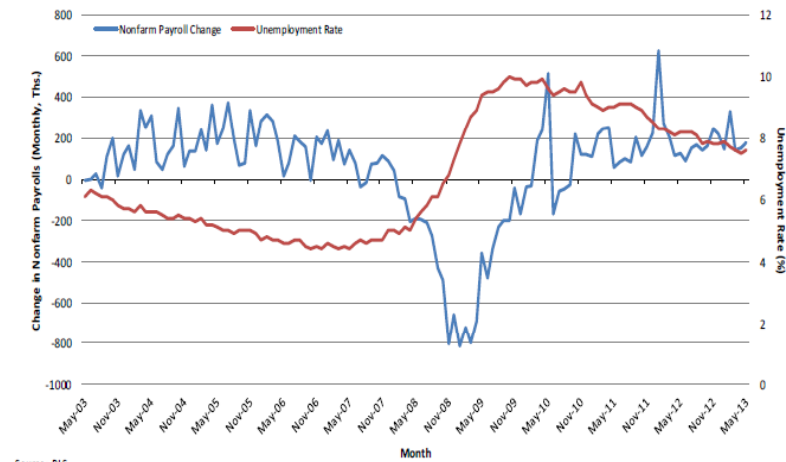


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# Economic Drivers

## Employment

Total Nonfarm Payrolls & Unemployment Rate, SA



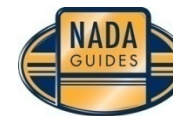
Source: BLS

## 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.



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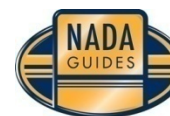
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