

NADAguides

Market Insights

Powersports Industry

Q1 2015

Industry Overview

Powersports Market Update

Powersports sales in 2015 got off to a slow start as activity in both retail and wholesale markets were considerably light. This was mainly due to the harsh weather climates throughout the country. As spring came closer and weather improved, some areas saw an uptick in sales and interest. That trend was prevalent in the wholesale market as the prices have increased. This was expected as most dealers aggressively start to stock pile inventory for the upcoming selling season.



Used sales have not fully recovered as we continue through spring but considering the current unpredictable weather patterns throughout many regions, many remain optimistic. Manufacturers are releasing all new models with competitive pricing and putting large incentives on older units that make purchasing a new unit much more desirable.



Powersport Values

Edition-Over-Edition Change in Values by Category

January-February 2015 Versus March-April 2015

Slow sales in winter and poor riding conditions are still present as we head into spring.

Sales begin to pick up speed but not enough to increase values in a majority of segments.

With large amounts of inventory available we see that only units in very good condition are able to hold their value.

Edition-Over-Edition Change in Average Retail

Street Bikes	Utility Vehicles	Dirt Bikes
-2.2%	-2.5%	-1.8%

NADAguides Change in Average Appraisal Amounts Edition-Over-Edition by Unit Type

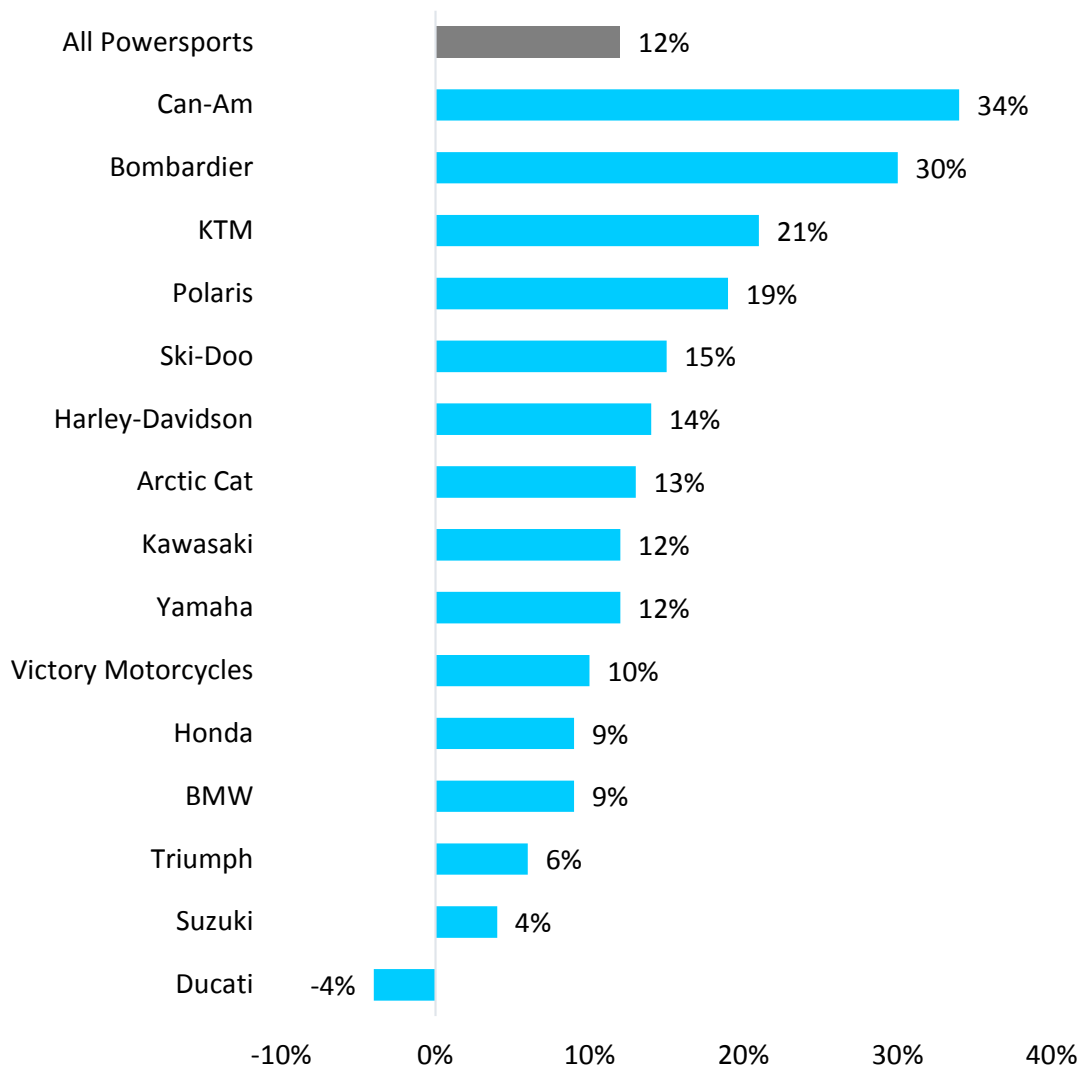
Unit Type Abbreviation	Unit Type	Rough Trade-In	Clean Trade-In	Average Retail
3-W	3 Wheel Cycle	↓ -3.9%	↓ -3.7%	↓ -3.5%
6-W	6 Wheel ATV	↓ -2.9%	↓ -3.1%	↓ -2.8%
8-W	8 Wheel ATV	↓ -5.0%	↓ -4.8%	↓ -4.5%
ATT	All Terrain Tractor	↓ -1.5%	↓ -1.0%	↓ -2.1%
C/T	Cruiser/Touring	↓ -2.5%	↓ -2.2%	↓ -2.0%
CRU	Cruisers	↓ -2.0%	↓ -2.1%	↓ -2.0%
D	Dirt (Not MX)	↑ 0.7%	↑ 0.6%	↓ -0.3%
DS	Dual Sport	↓ -4.9%	↓ -4.5%	↓ -3.9%
E	Enduro	↓ -1.6%	↓ -1.4%	↓ -2.3%
MB	Minibike	↓ -1.9%	↓ -1.9%	↓ -1.5%
MX	Moto Cross	↓ -1.7%	↓ -1.6%	↓ -2.0%
C	Racer (Not MX)	↓ -3.0%	↓ -2.8%	↓ -2.5%
RT	Road/Trail	↓ -1.3%	↓ -1.2%	↓ -1.0%
S	Scooter	↓ -1.6%	↓ -1.4%	↓ -2.0%
SAT	Sport ATV	↓ -2.0%	↓ -2.1%	↓ -2.1%
SXS	Sport Side By Side	↓ -2.5%	↓ -2.4%	↓ -2.1%
S/T	Sport Touring	↓ -2.0%	↓ -1.8%	↓ -1.5%
SPT	Sportbikes	↓ -2.5%	↓ -2.3%	↓ -2.1%
TOU	Touring	↓ -1.6%	↓ -1.9%	↓ -1.8%
T	Trail	↓ -1.9%	↓ -2.0%	↓ -1.9%
TR	Trials	↓ -1.5%	↓ -1.4%	↓ -1.2%
UAT	Utility ATV	↓ -2.2%	↓ -2.2%	↓ -2.1%
UTL	Utility Side By Side	↓ -2.3%	↓ -2.3%	↓ -2.1%



Powersport Brands

YoY Change in Research of Top Powersport Brands on NADAguides.com

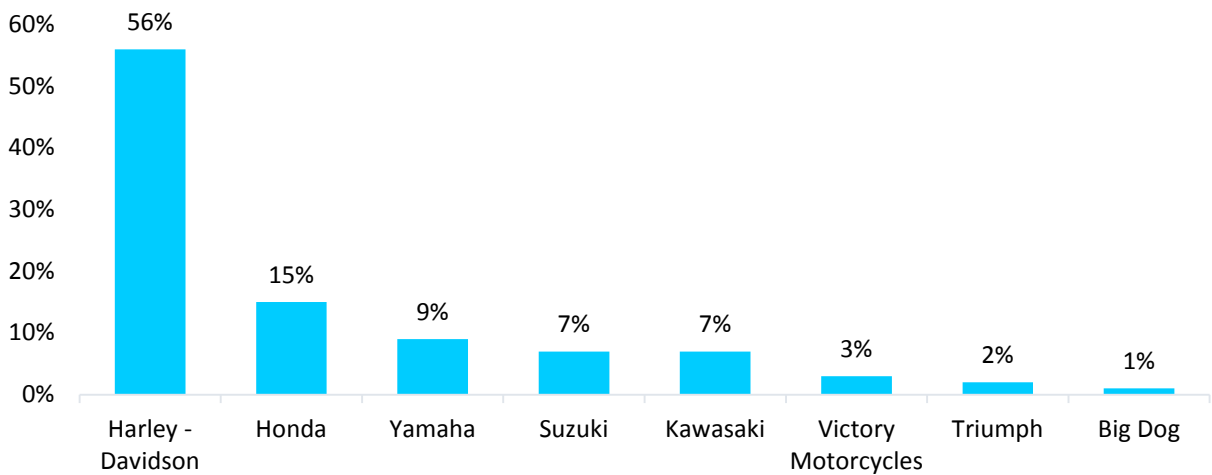
The figures below are based on consumer traffic on NADAguides.com and are calculated by comparing the percentage change of consumer interest, for the top 15 researched manufacturers, January-March 2014 as compared to January-March 2015.



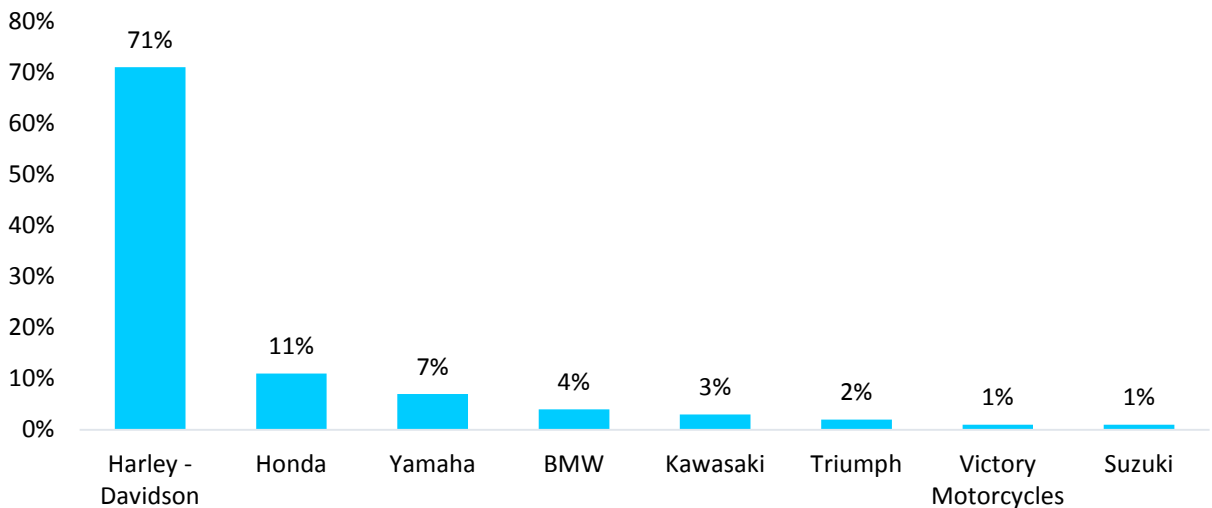
Motorcycle Brands

NADAguides.com Top Researched Brands in 2015

Cruiser Brands



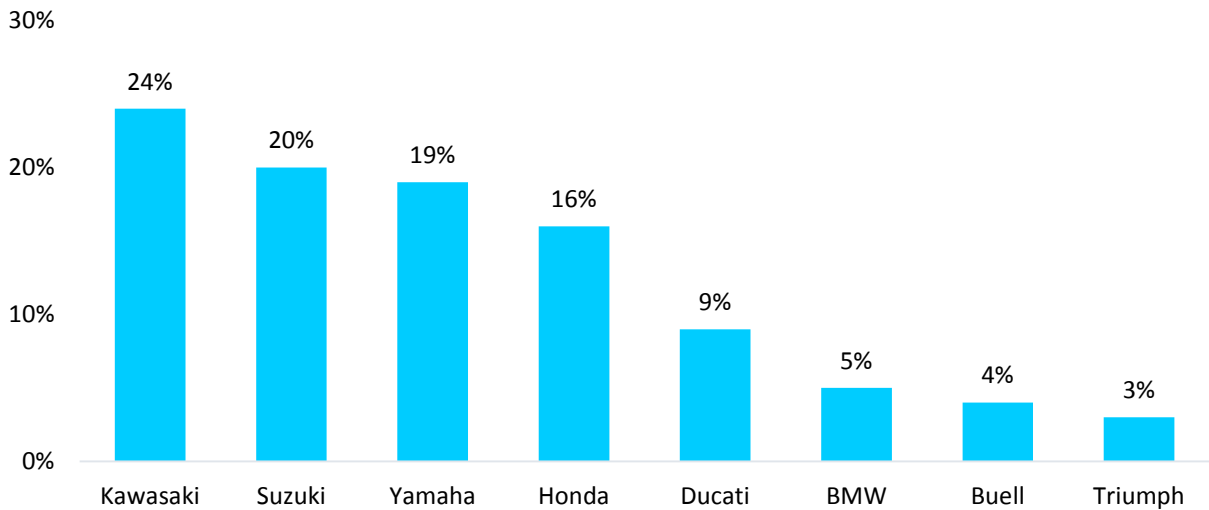
Touring Brands



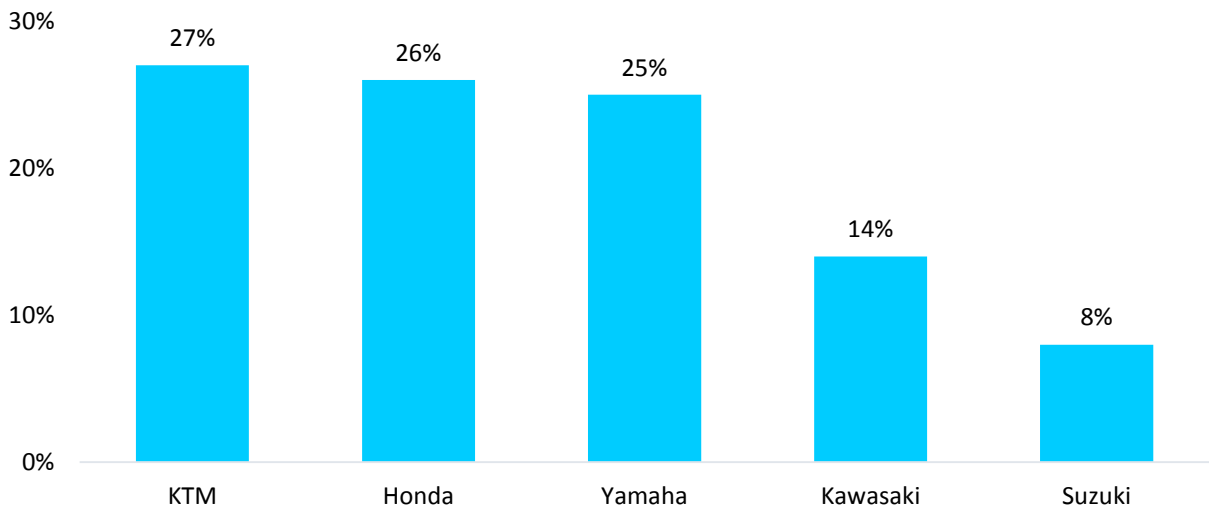
Motorcycle Brands

NADAguides.com Top Researched Brands in 2015

Sportbike Brands



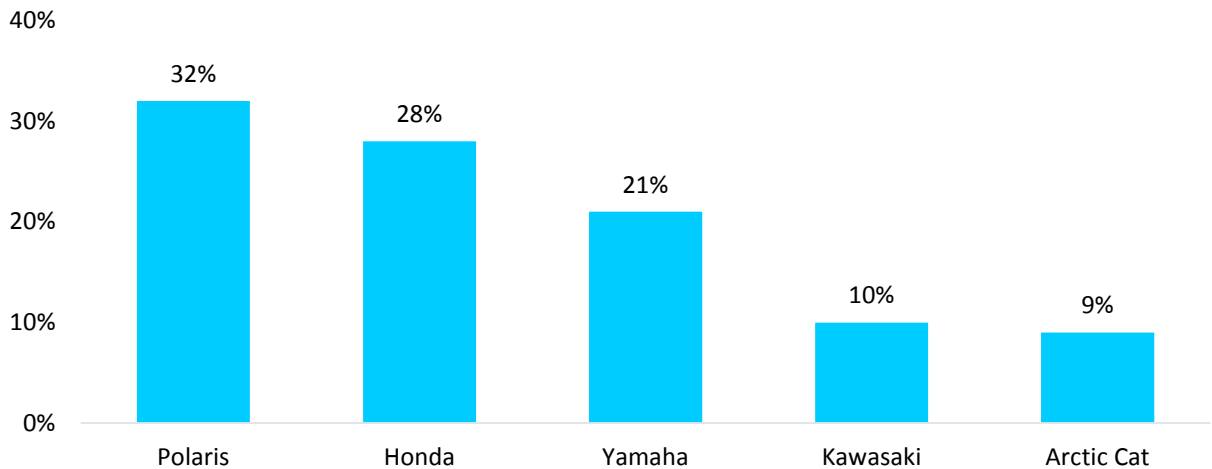
Off-Highway Brands



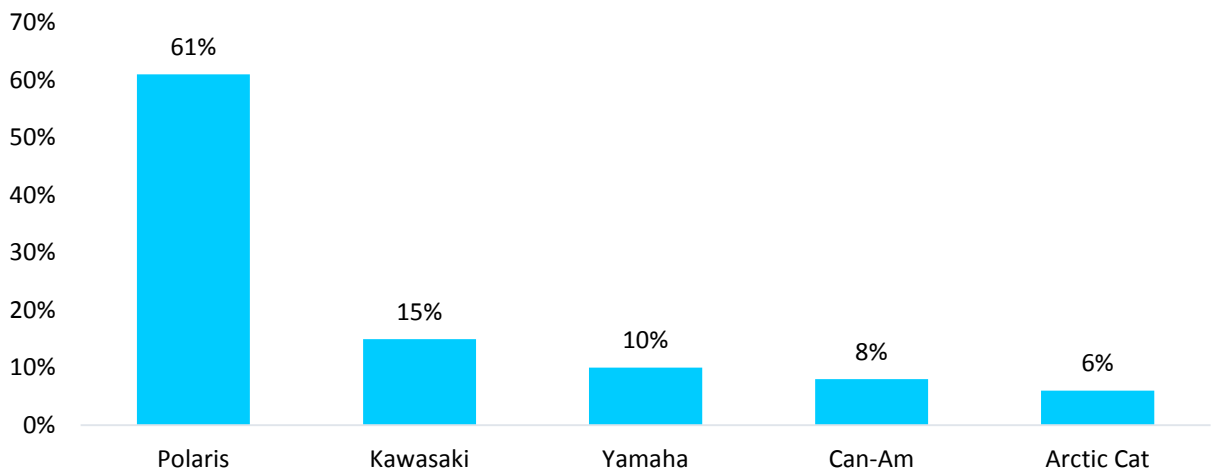
Off-Road Vehicle Brands

NADAguides.com Top Researched Brands in 2015

All-terrain Vehicle Brands



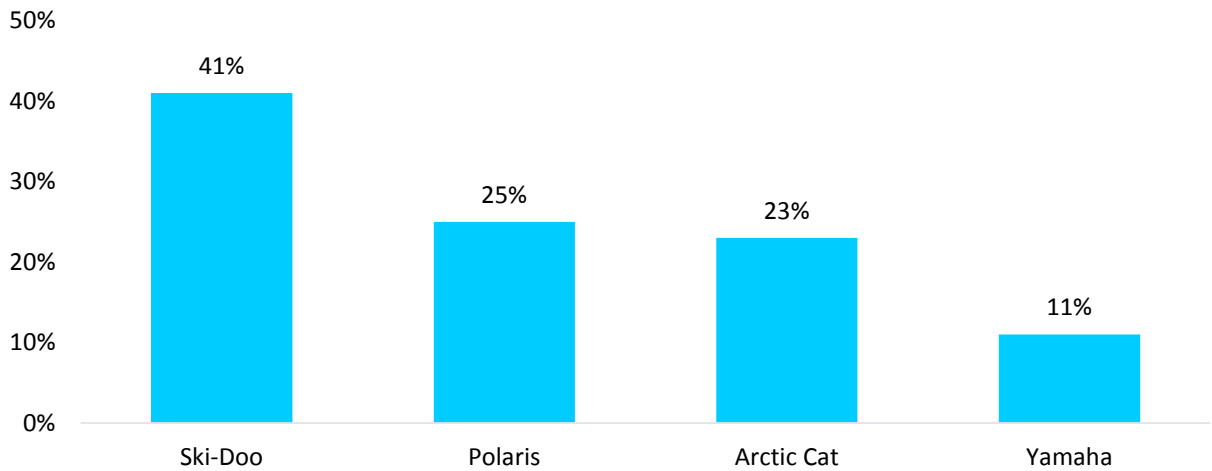
Side By Side Brands



Snowmobile Brands

NADAguides.com Top Researched Brands in 2015

Snowmobile Brands

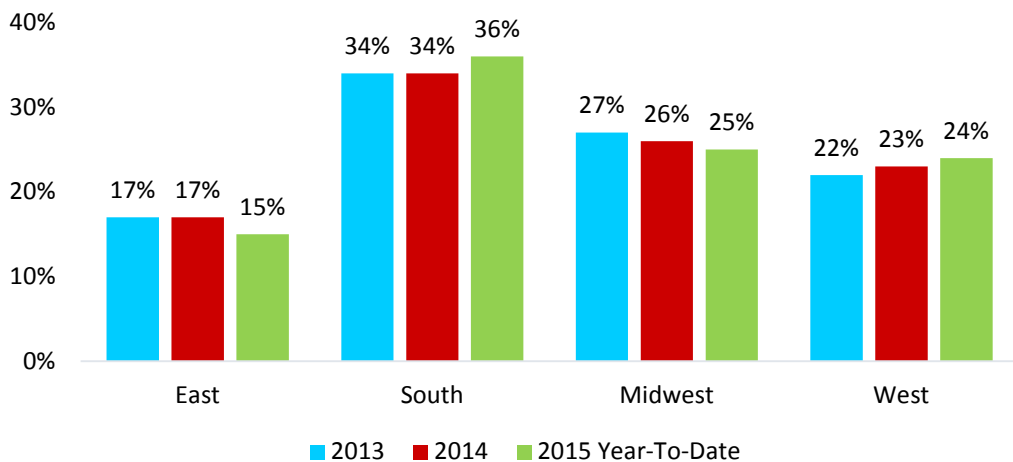


Web Traffic by Region

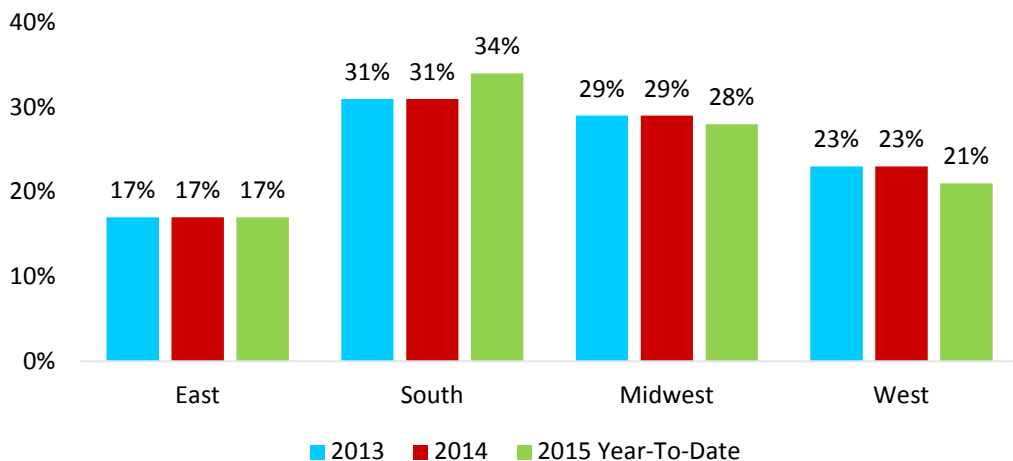
Regional Distribution of NADAguides.com Traffic

The NADAguides powersports data is based on national averages; however, our analysts recognize the significance of regional variance by unit type. The following charts represent consumer traffic based on four regions. Traffic percentages for 2013 and 2014 are offered as a comparison to the year-to-date 2015 traffic.

Motorcycles



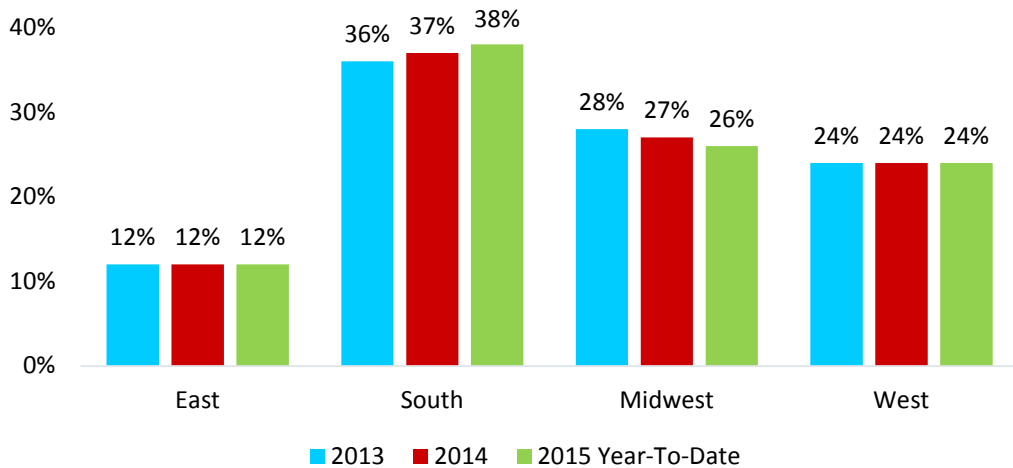
All-terrain Vehicles



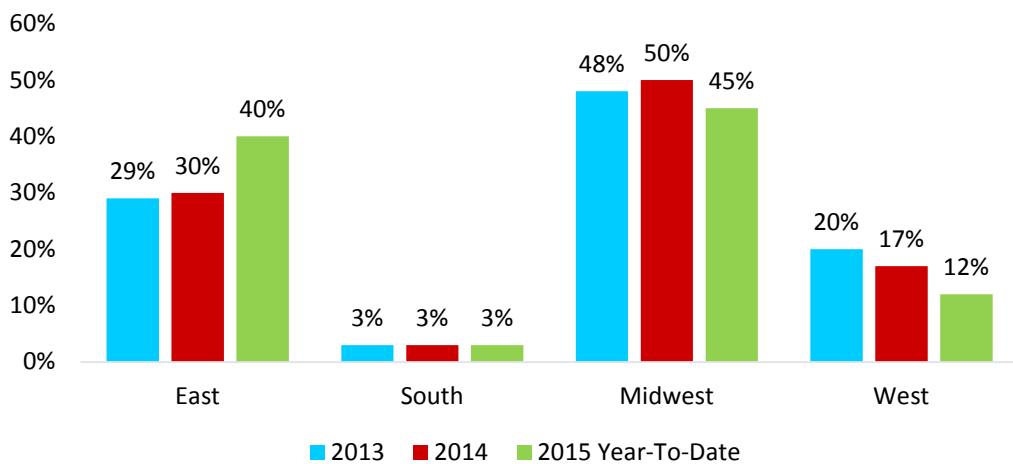
Web Traffic by Region

Regional Distribution of NADAguides.com Traffic in 2015

Side By Sides



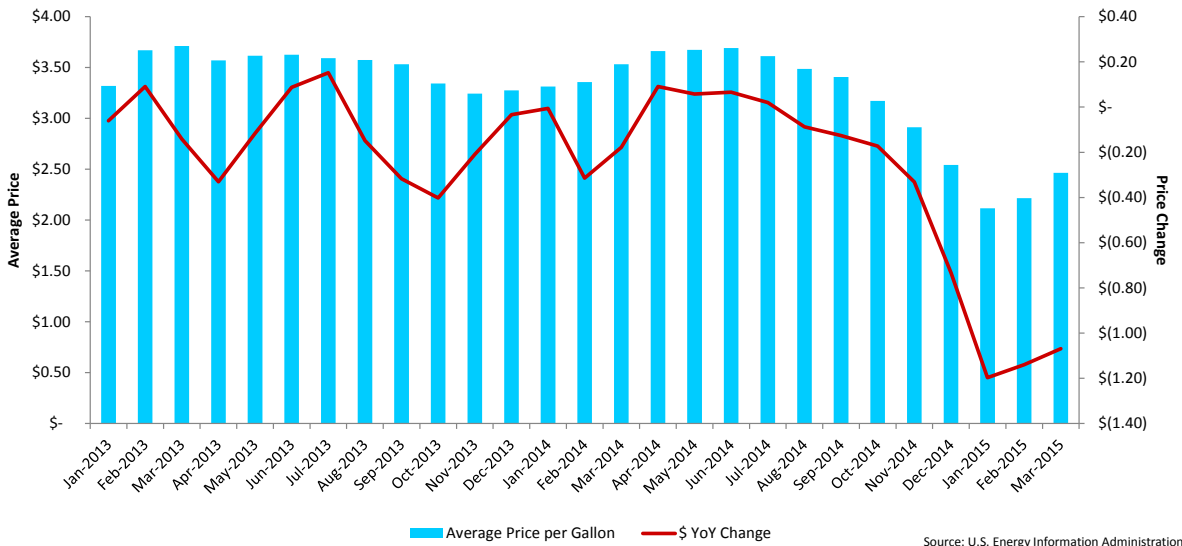
Snowmobiles



Fuel Price Data

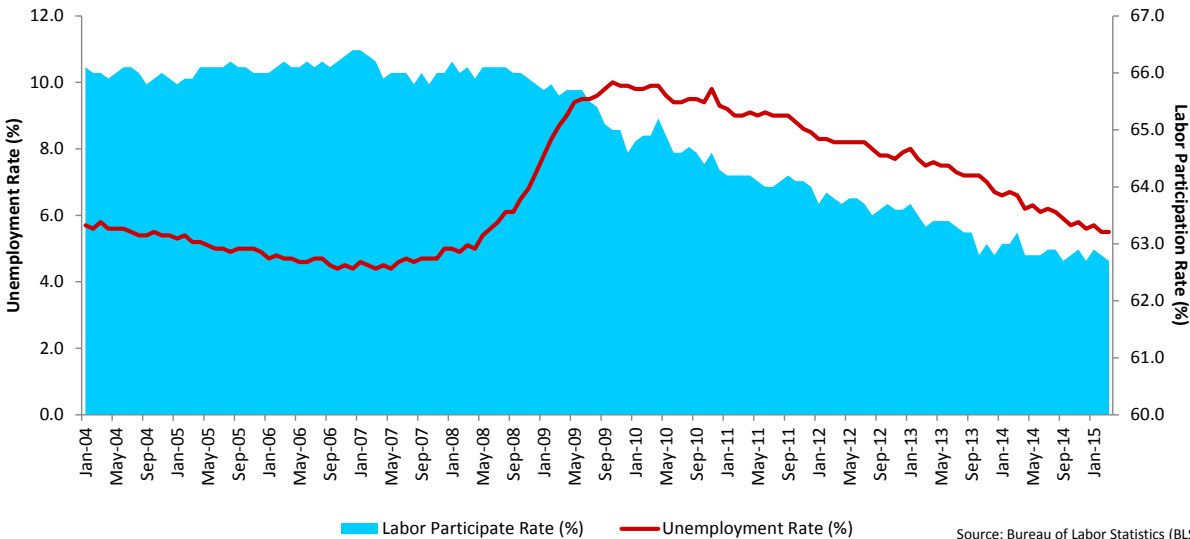
A view of the national average gasoline prices and year-over-year change is supplied to provide support for longer-term strategic planning.

Regular Grade Gasoline Prices (All Formulations)



Economic Data

Unemployment & Labor Participation Rate (Seasonally Adjusted)



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