

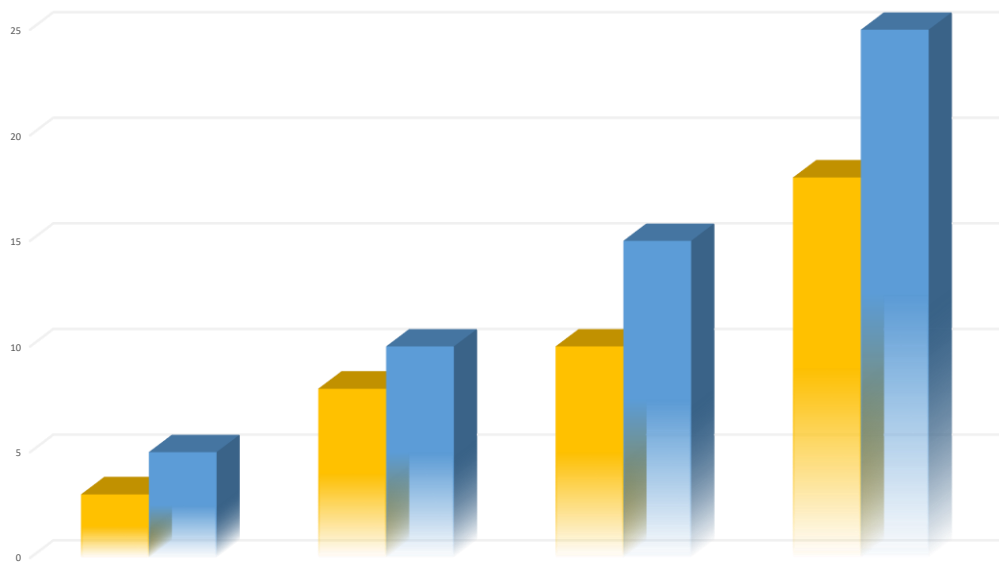
1st Quarter 2020

NADAguides **POWERSPORTS** MARKET INSIGHTS

J.D. POWER

NADAguides is a division of J.D. Power

A look at NADAguides.com consumer traffic trends, used values, dealer and financial institution focus, and more



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Industry Overview

Powersports Market Update

Obviously, dealership closures and stay-at-home orders turned business on its head in March and will continue to do so in the 2nd quarter. As we continue to assess the fallout, we can track how the Powersport industry was doing before and in the early stages of the shutdown.

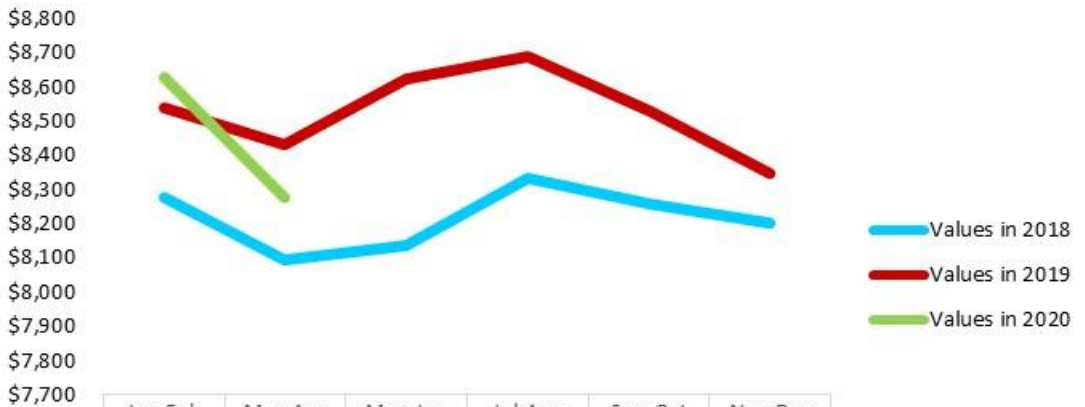
All segments of the industry showed a typical decline in the first quarter, with cruisers depreciating more than usual. In the motorcycle segment, sportbikes were strong, returning average pricing higher than the previous two years. Cruisers showed some weakness, starting out the year in a good position but then losing 4% of their value on average from January-February to March-April.

Side-by-sides brought relatively healthy pricing in the first quarter, with the sport segment outperforming the first quarter of 2019 by 2.4% on average. The utility segment started out 2020 behind the same period of 2019, but saw more moderate depreciation to end up similar in the March-April edition of both years.

Powersports Values

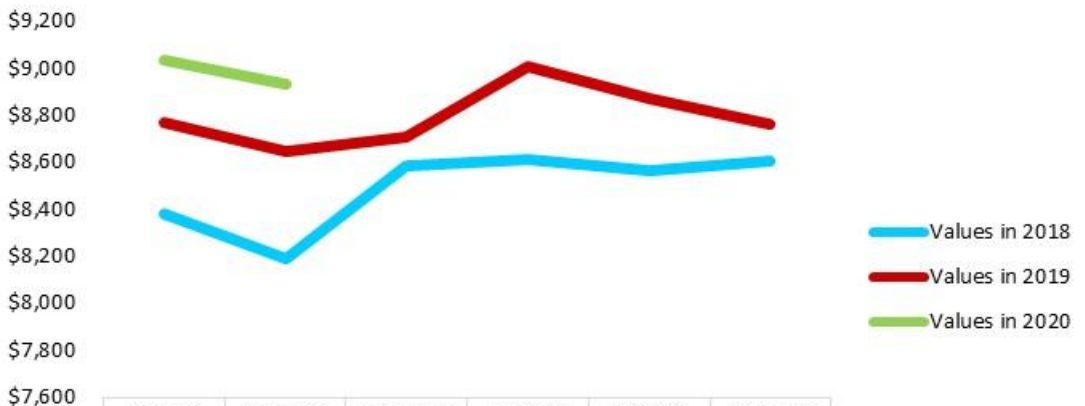
Average Retail Value by Category - Values for the Last 10 Model Years

Cruisers



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	\$8,277	\$8,095	\$8,137	\$8,336	\$8,260	\$8,201
Values in 2019	\$8,542	\$8,434	\$8,626	\$8,689	\$8,530	\$8,348
Values in 2020	\$8,631	\$8,276				

Sportbikes

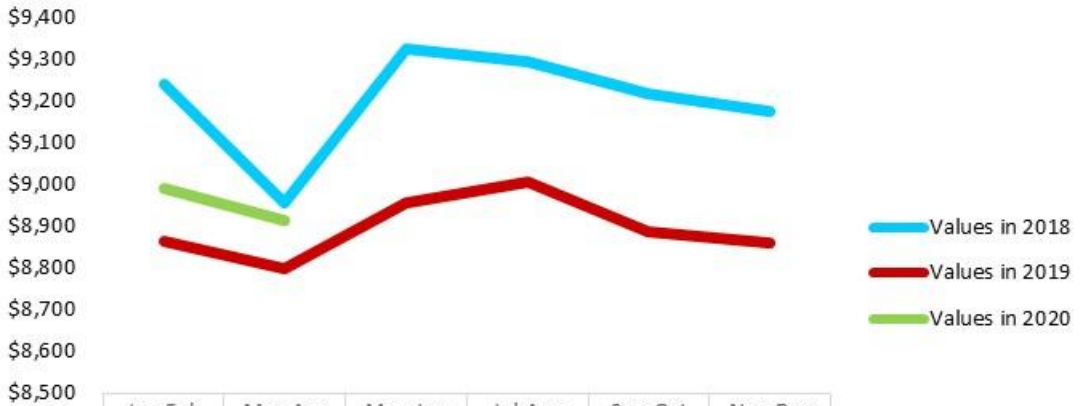


	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	\$8,377	\$8,190	\$8,584	\$8,610	\$8,562	\$8,608
Values in 2019	\$8,771	\$8,644	\$8,710	\$9,011	\$8,875	\$8,764
Values in 2020	\$9,032	\$8,932				

Powersports Values

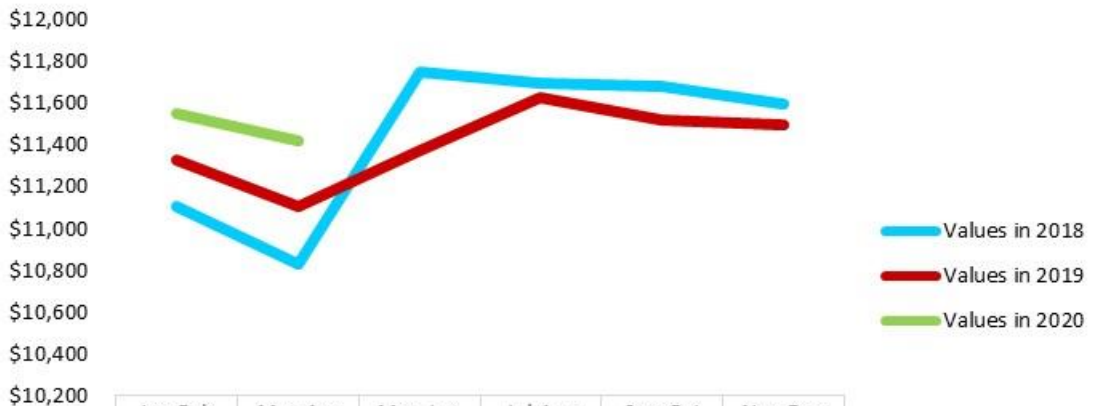
Average Retail Value by Category - Values for the Last 10 Model Years

Utility Side By Sides



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	\$9,238	\$8,956	\$9,323	\$9,293	\$9,215	\$9,173
Values in 2019	\$8,862	\$8,800	\$8,954	\$9,007	\$8,888	\$8,861
Values in 2020	\$8,989	\$8,912				

Sport Side By Sides



	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Values in 2018	\$11,107	\$10,833	\$11,750	\$11,697	\$11,686	\$11,600
Values in 2019	\$11,327	\$11,104	\$11,378	\$11,627	\$11,523	\$11,495
Values in 2020	\$11,552	\$11,418				

Powersports Values vs. Traffic

Average Retail Value and Traffic Views by Category

Cruisers



Sportbikes



Powersports Values vs. Traffic

Average Retail Value and Traffic Views by Category

Utility Side By Sides

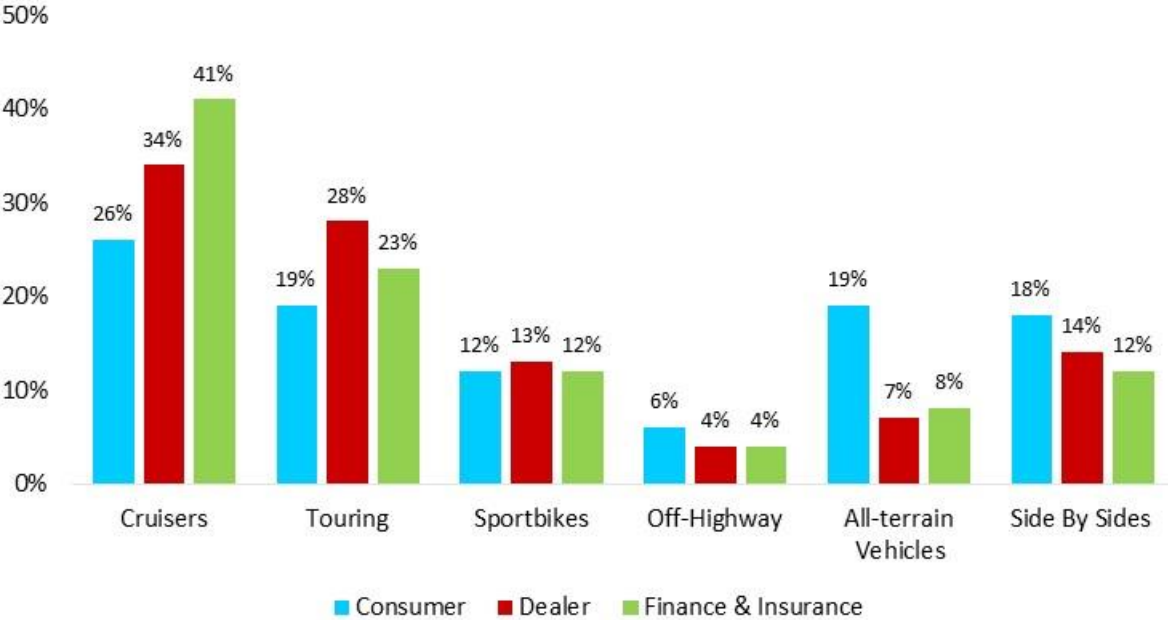


Sport Side By Sides



Powersports Categories

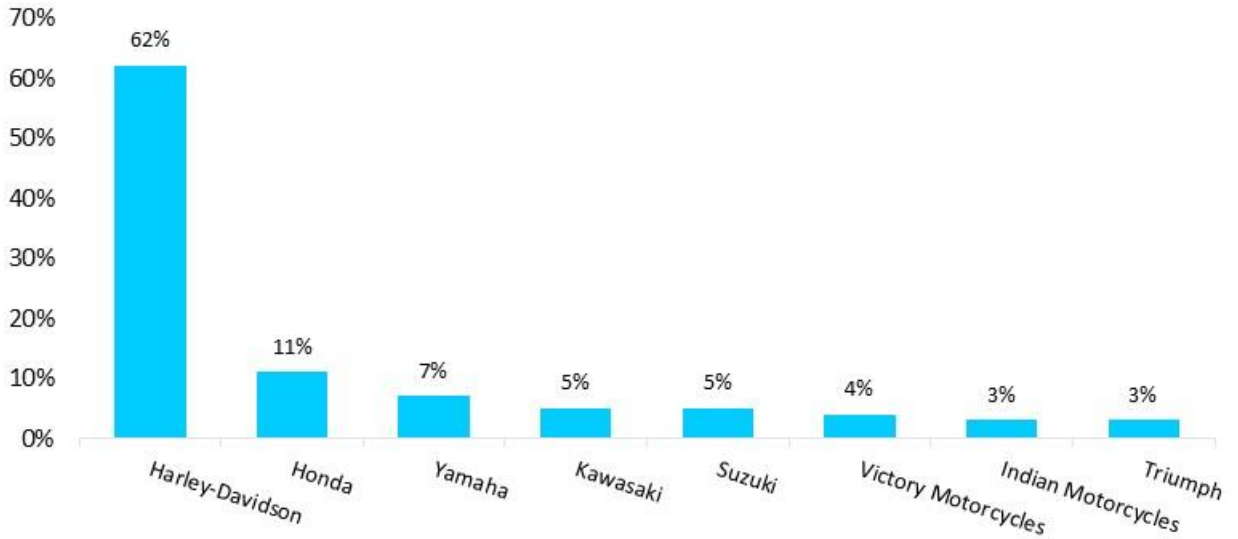
Category Views Among Consumers, Dealers, and Finance & Insurance Institutions in 2020 Q1



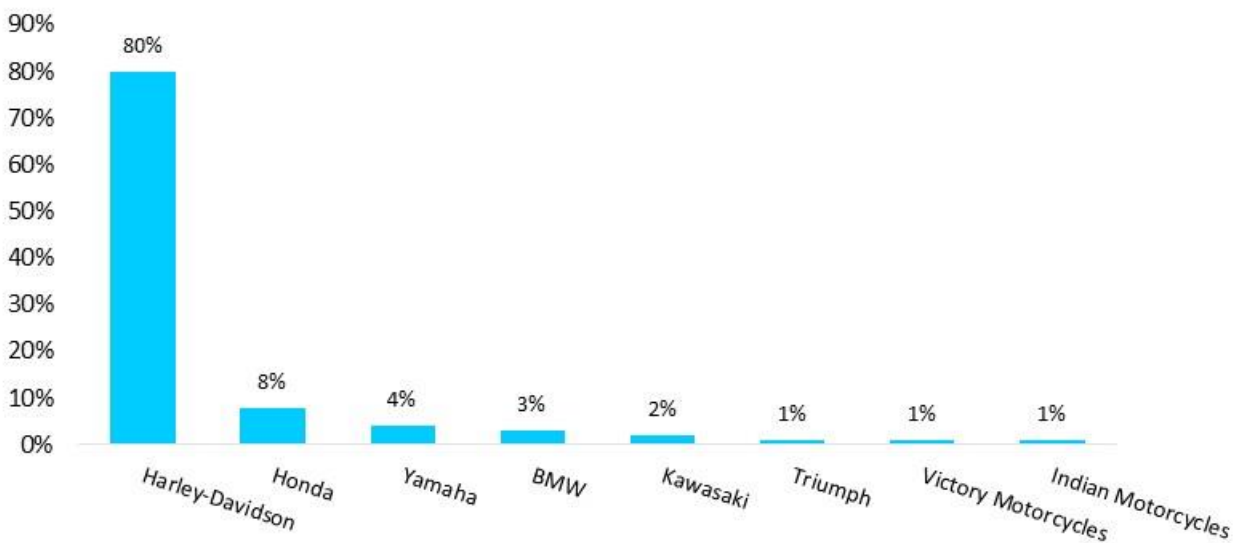
Motorcycle Brands

NADAguides.com Top Researched Brands in 2020 Q1

Cruiser Brands



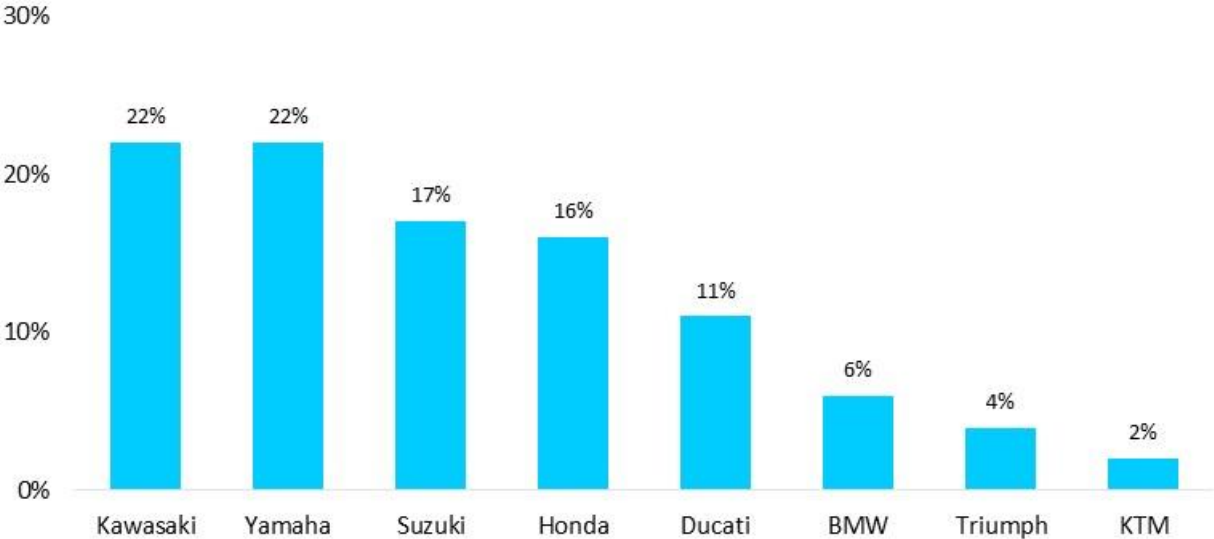
Touring Brands



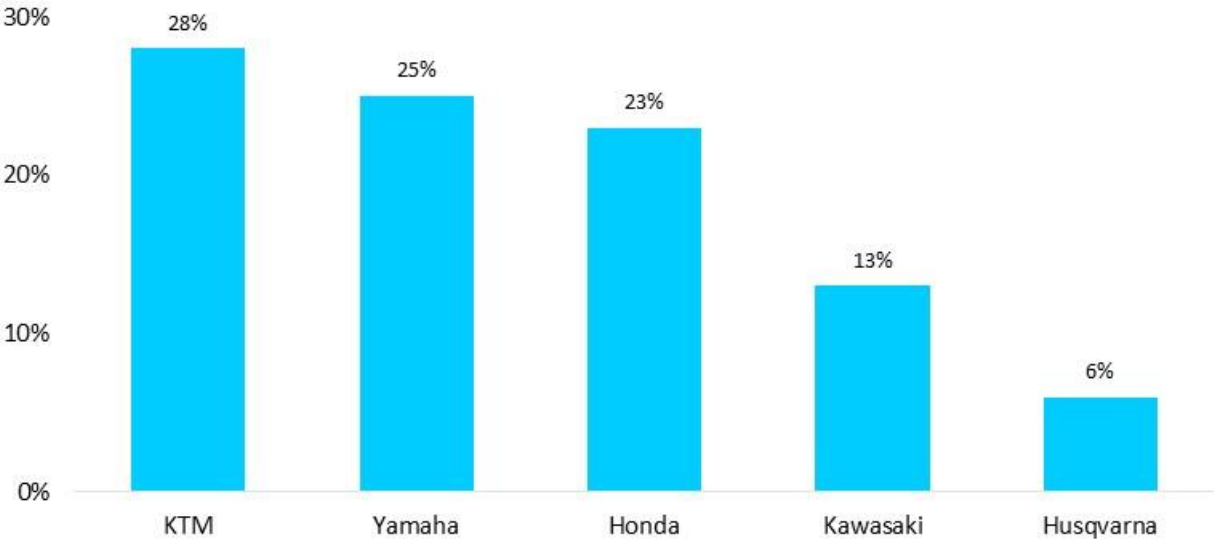
Motorcycle Brands

NADAguides.com Top Researched Brands in 2020 Q1

Sportbike Brands



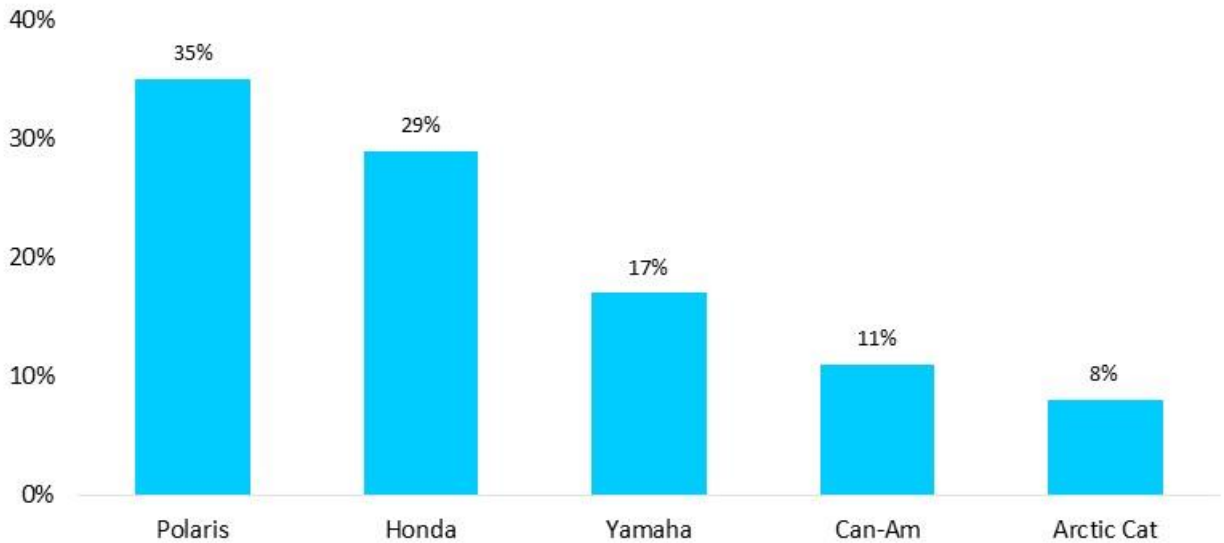
Off-Highway Brands



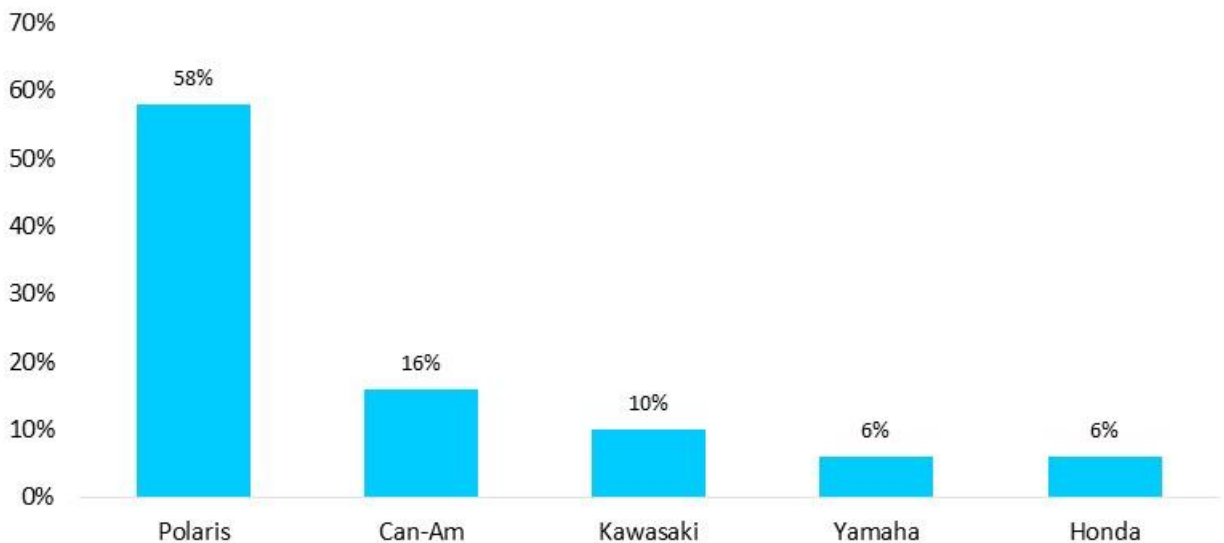
Off-Road Vehicle Brands

NADAguides.com Top Researched Brands in 2020 Q1

All-terrain Vehicle Brands



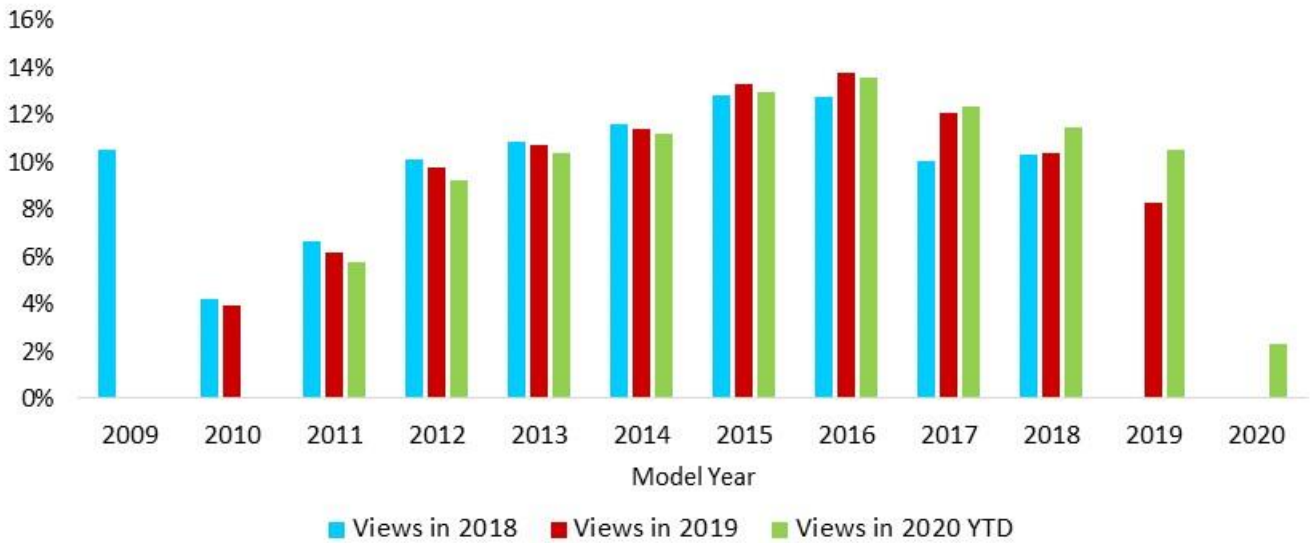
Side By Side Brands



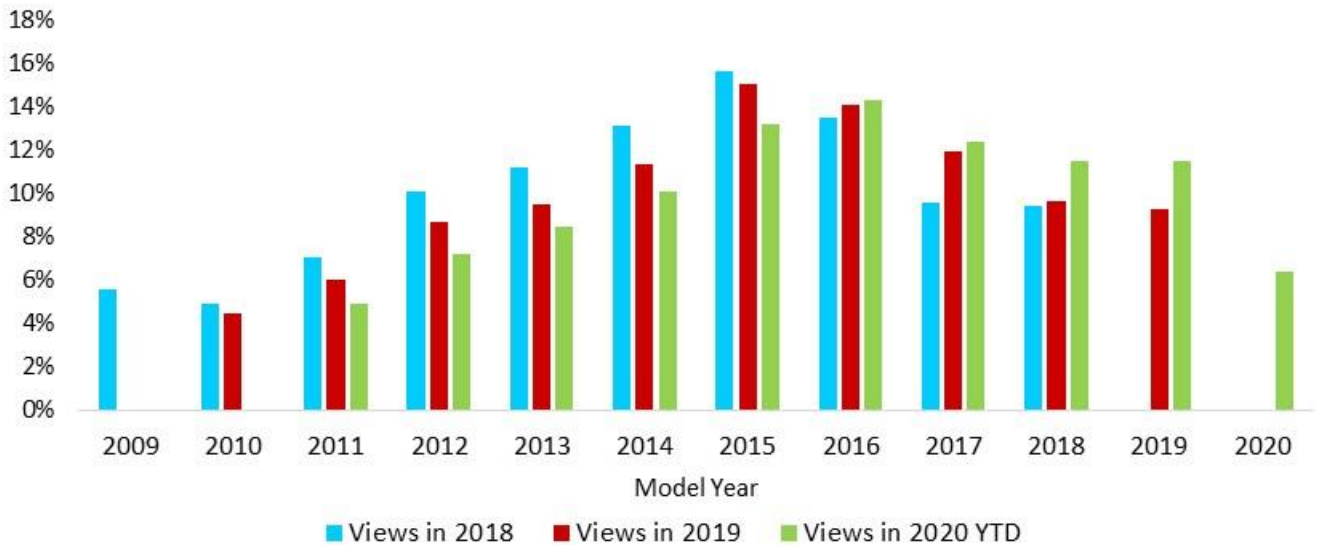
Model Years

NADAguides.com Top Researched Model Years by Category

Sportbikes



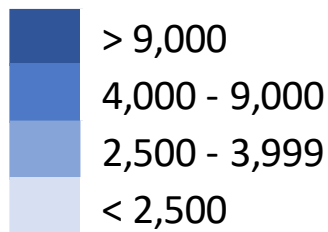
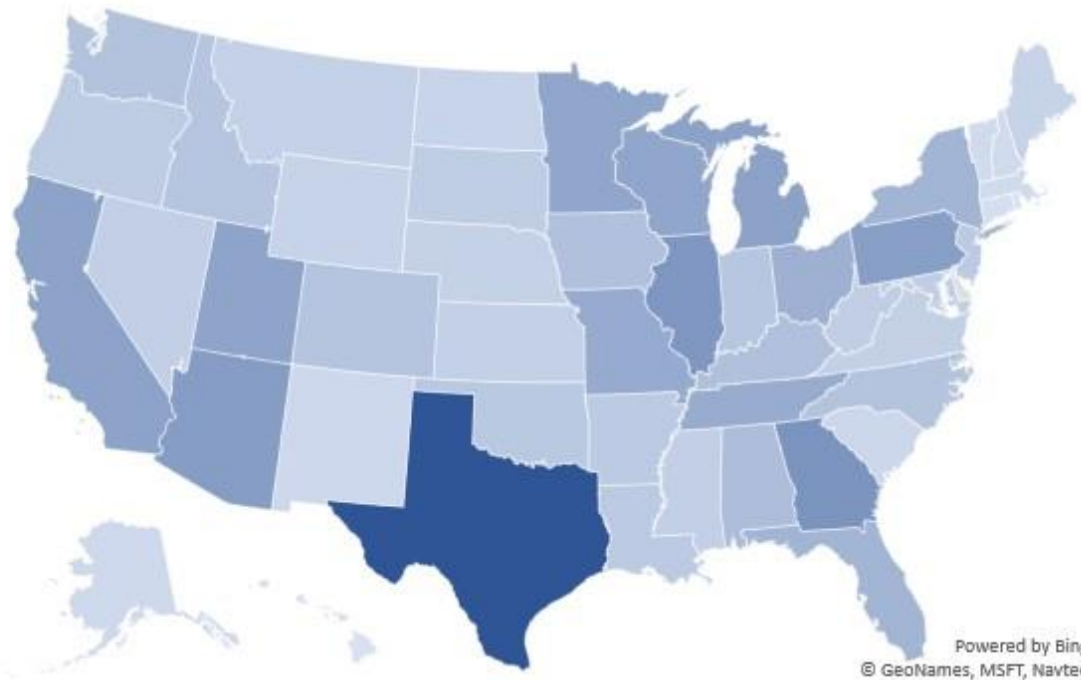
Utility Side By Sides



Web Traffic by State

NADAguides.com Traffic by State in 2020 Q1

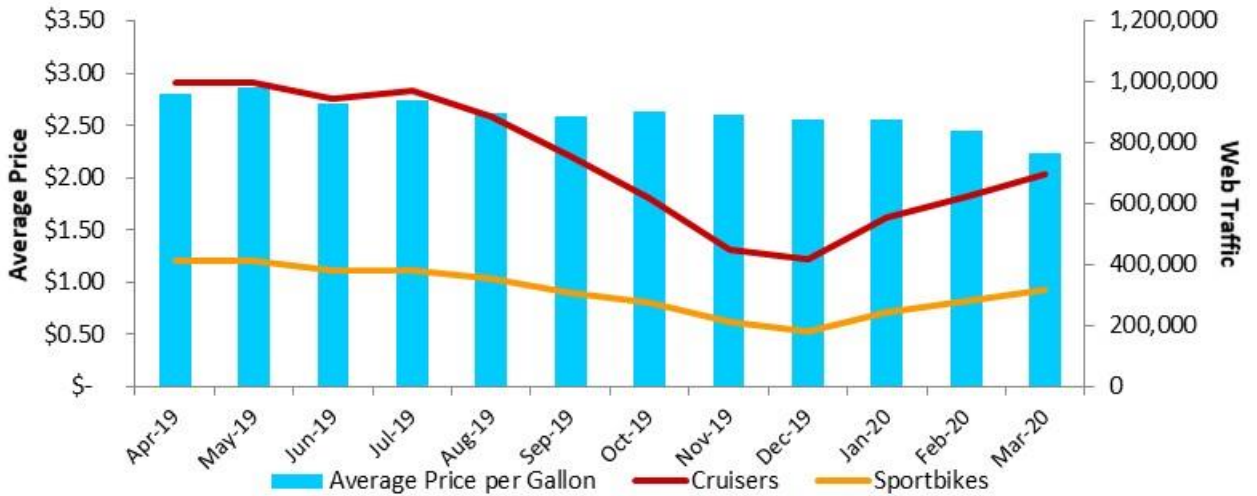
Side By Sides



Fuel Price Data

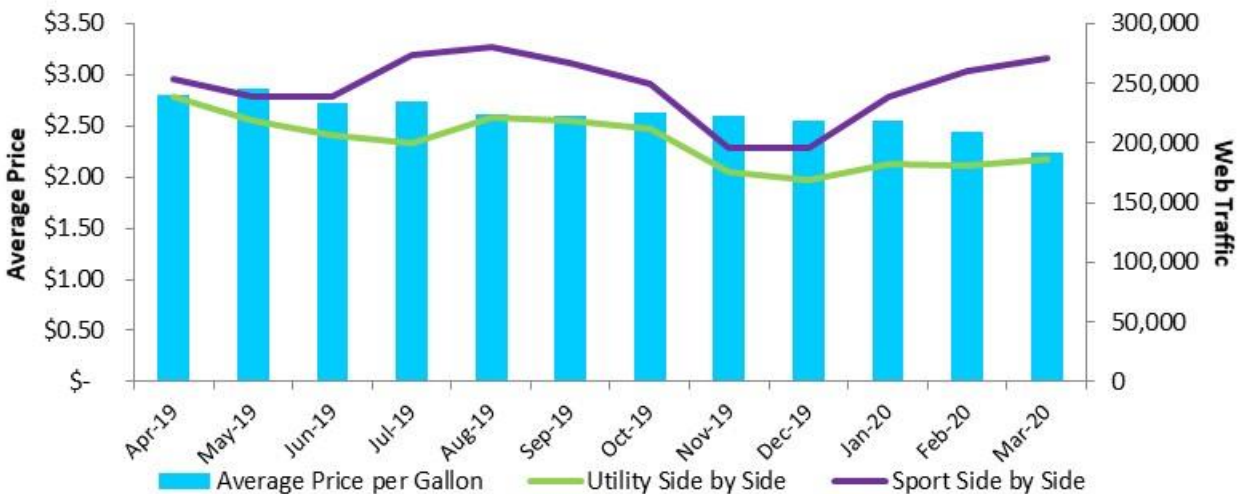
Regular Grade Gasoline Prices vs. Consumer Traffic by Category

Motorcycles



Source: U.S. Energy Information Administration

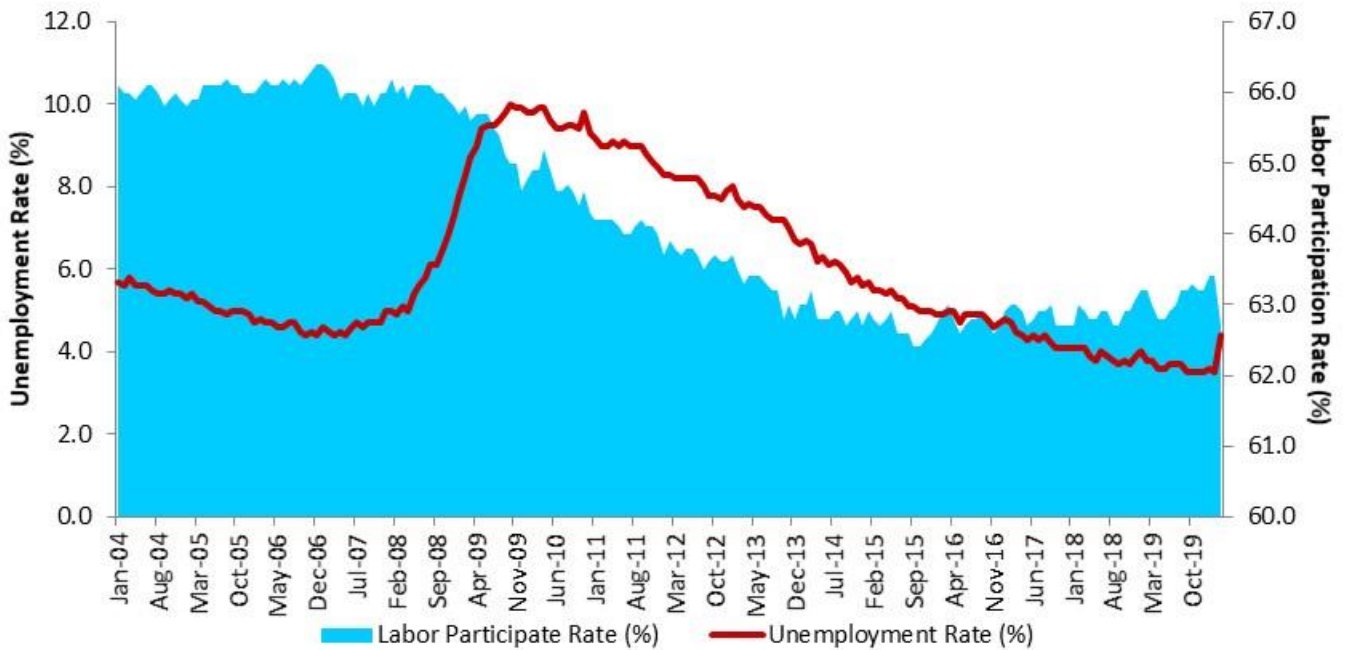
Side By Sides



Source: U.S. Energy Information Administration

Economic Data

Unemployment & Labor Participation Rate (Seasonally Adjusted)



Source: Bureau of Labor Statistics (BLS)

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