DRIVING IDAHO'S ECONOMY

ANNUAL CONTRIBUTION OF IDAHO'S NEW-CAR AND -TRUCK DEALERS*

Idaho's dealers maintain a multi-**billion** dollar retail industry

112
NEW-CAR AND -TRUCK DEALERSHIPS

In 2012, there were an estimated 112 new-car and -truck dealers in Idaho.

$2.8 BILLION
TOTAL SALES

14.6%
TOTAL RETAIL SALES

Total sales of all Idaho new-car and -truck dealerships was $2.8 billion in 2012, representing 14.6% of total retail sales in the state.

$224 MILLION
PAYROLL

$47,043
AVERAGE ANNUAL EARNINGS

The annual payroll of new-car and -truck dealerships in Idaho in 2012 was $224 million, with average annual earnings for dealership employees at $47,043.

4,766
EMPLOYEES

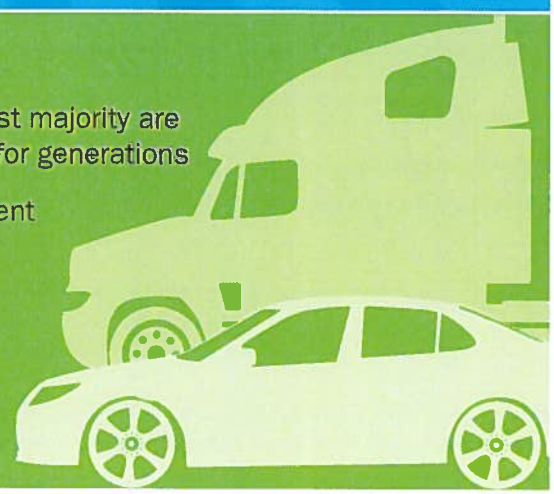
43
AVERAGE PER DEALERSHIP

In 2012, new-car and -truck dealerships account for 4,766 jobs in Idaho, employing an average of 43 people per dealership.

*Numbers reflect annual economic activity during 2012.

AUTOMOBILE and TRUCK DEALERS...

- Are independent businesses, not manufacturer-owned stores; the vast majority are local, family-owned businesses that have been in their communities for generations
- Invest millions of dollars in land, facilities, parts and service equipment to sell and service vehicles
- Generate hundreds of millions of dollars in tax revenues for state and local government and provide nearly 15 percent of all retail spending in the U.S.



www.nada.org/StateEconomy

DEALER INTELLIGENCE

Geography Intell 2013

Body Type: CAR, TRUCK; New/Used: ALL

Geographical Breakdown by Top Ten Makes (Mkt Shr Pcts)

	CHEV	DODG	FORD	GMC	HOND	HYUN	JEEP	NISS	SUBA	TOYT
ADA	12%	9%	**26%**	4%	11%	6%	4%	9%	7%	13%
ADAMS				20%				20%	**40%**	20%
BANNOCK	**40%**	8%	14%	24%	3%	1%	2%	2%	2%	3%
BEAR LAKE	12%	25%	**47%**	4%		1%	9%	1%		
BENEWAH	**24%**	18%	22%	12%		1%	7%	3%	5%	8%
BINGHAM	12%	13%	**26%**	5%	8%	3%	3%	7%	8%	15%
BLAINE	15%	6%	**44%**	8%	3%	0%	13%	2%	4%	6%
BOISE	22%	17%	**31%**	6%	2%	2%	8%	5%	2%	6%
BONNER	**37%**	6%	29%	13%	2%	1%	2%	1%	6%	4%
BONNEVILLE	20%	12%	15%	6%	8%	3%	3%	6%	6%	**21%**
BOUNDARY	**28%**	18%	18%	5%	1%		5%	2%	15%	8%
BUTTE	**43%**	**43%**		14%						
CANYON	18%	15%	**27%**	7%	8%	1%	4%	3%	4%	12%
CARIBOU	18%	6%	**68%**	4%	1%	0%	2%	1%	0%	1%
CASSIA	25%	23%	**29%**	14%	1%	1%	2%	2%	0%	2%
CLEARWATER	6%	**66%**	6%	1%	1%		17%		2%	2%
ELMORE	17%	31%	**34%**	4%	2%	1%	6%	3%	1%	2%
FRANKLIN	8%	**43%**	36%	2%	2%		6%	1%	0%	3%
FREMONT	**56%**	2%	1%	36%			3%			2%
GEM	24%	**29%**	21%	11%	1%		8%	3%	1%	1%
GOODING	24%	20%	**38%**	5%	2%	2%	3%	2%	1%	4%
IDAHO	**62%**	12%	13%	3%	0%		1%	2%	3%	3%
JEFFERSON	**64%**	5%	11%	9%	3%	0%	2%	3%	0%	2%
JEROME	**38%**	13%	23%	7%	5%	2%	5%	3%	1%	3%
KOOTENAI	14%	10%	16%	6%	6%	2%	4%	4%	12%	**26%**
LATAH	12%	4%	14%	4%	4%	2%	3%	2%	**50%**	6%
LEMHI	22%	19%	**36%**	12%	1%	0%	5%	1%	2%	2%
LEWIS	22%	9%	**47%**	3%	3%			9%		6%
LINCOLN	22%	17%	**39%**	6%					6%	11%
MADISON	24%	11%	**27%**	14%	3%	1%	3%	2%	1%	14%
MINIDOKA	**29%**	22%	25%	14%	1%	2%	2%	3%	1%	2%
NEZ PERCE	15%	12%	16%	2%	9%	5%	3%	4%	9%	**25%**
ONEIDA	25%	**50%**	25%							
OWYHEE	**28%**	15%	27%	7%	6%	2%	3%	7%	1%	4%
PAYETTE	**41%**	15%	20%	11%	2%	2%	2%	2%	1%	6%
POWER	25%	24%	**28%**	7%	3%		4%	5%	3%	3%
SHOSHONE	21%	**47%**	2%	12%	1%	0%	15%	0%	0%	1%
TETON	16%	5%	11%				5%		**63%**	
TWIN FALLS	16%	13%	**23%**	7%	8%	4%	4%	7%	5%	14%
VALLEY	1%	27%	**59%**	1%			9%		1%	1%
WASHINGTON	5%	30%	**52%**	2%	1%	1%	6%	1%	0%	3%

DEALER INTELLIGENCE

Geography Intell 2013

Body Type: CAR, TRUCK; New/Used: ALL

Geographical Area Totals by Units

NEW

	2013 YE	2012 YE	%Change 2012 - 2013	Mkt Share
District 1	5,627	4,855	16%	14%
District 2	1,992	1,878	6%	5%
District 3	21,665	18,328	18%	53%
District 4	3,276	3,039	8%	8%
District 5	8,438	7,676	10%	21%
Total	40,998	35,776	15%	

USED

	2013 YE	2012 YE	%Change 2012 - 2013	Mkt Share
District 1	13,391	13,332	0%	12%
District 2	4,445	4,601	-3%	4%
District 3	51,103	48,830	5%	46%
District 4	12,137	12,112	0%	11%
District 5	24,076	24,645	-2%	21%
Total	105,152	103,520	2%	

IADA

Idaho Automobile Dealers Association

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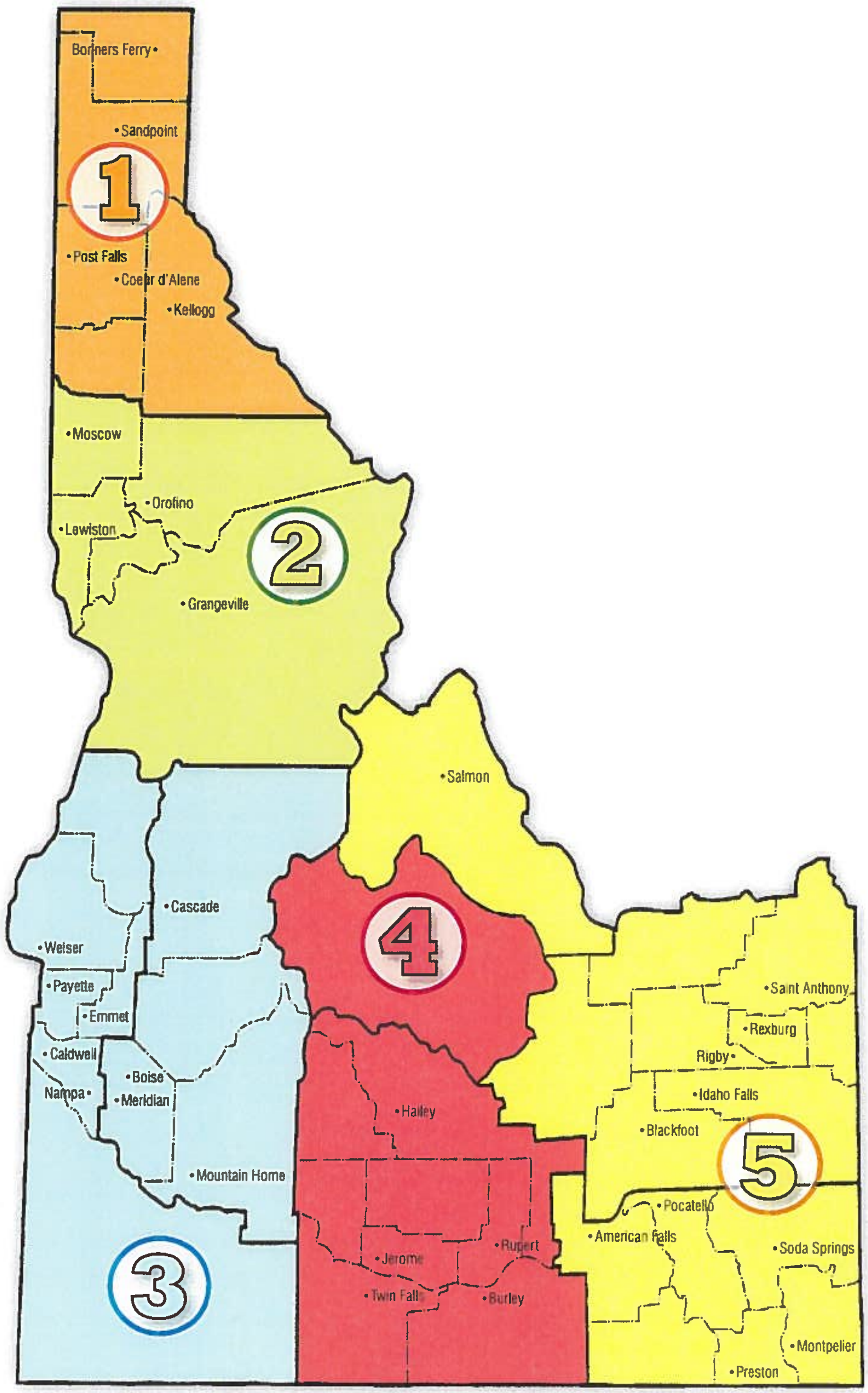

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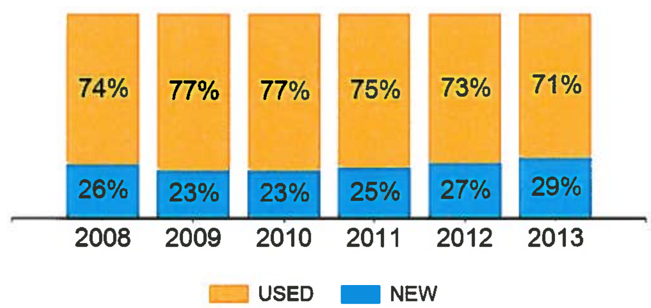
Trends Intell 2013

Dealer District: 1; Body Type: CAR, TRUCK; New/Used: ALL

State Of The Industry 2013 - 2012

	2013	2012
NEW		
Avg Sales / Dealership	$7,281,733	$7,202,208
Total Sales All Dealerships	$131,071,190	$129,639,745
Total Tax Collected All Dealerships	$5,748,236	$5,791,289
USED		
Avg Sales / Dealership	$1,312,468	$1,292,397
Total Sales All Dealerships	$140,434,078	$144,748,443
Total Tax Collected All Dealerships	$6,806,434	$6,836,559

Yearly Trend



2013 Leading Dealers by Units

	MKT SHR%	UNITS	YTD
PARKER TOYOTA	16.41%	2,888	2,888
DAVE SMITH MOTORS	11.57%	2,036	2,036
AUTO CREDIT	6.38%	1,123	1,123
DAVE SMITH FRONTIER SALES	5.90%	1,038	1,038
PARKER SUBARU	5.46%	961	961
KNUDTSEN CHEVROLET CO	4.77%	839	839
LAKE CITY FORD LINCOLN	4.72%	830	830
SANDS AUTO	3.85%	677	677
ROBIDEAUX MOTORS CO	3.73%	657	657
Total	62.77%	11,049	11,049

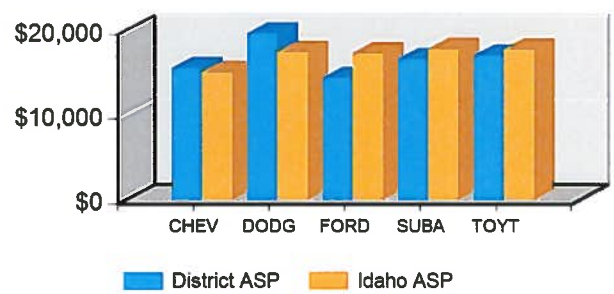
2013 Leading Dealers by $(K)

	MKT SHR%	DOLLARS	YTD
DAVE SMITH MOTORS	19.20%	$52,120	$52,120
PARKER TOYOTA	18.16%	$49,308	$49,308
LAKE CITY FORD LINCOLN	7.37%	$20,019	$20,019
PARKER SUBARU	7.18%	$19,493	$19,493
DAVE SMITH FRONTIER SALES	6.20%	$16,826	$16,826
KNUDTSEN CHEVROLET CO	5.75%	$15,599	$15,599
ROBIDEAUX MOTORS CO	4.47%	$12,128	$12,128
MIDWAY CHRY DODGE JEEP RAM	4.44%	$12,062	$12,062
TAYLOR & SONS CHEVROLET	3.14%	$8,521	$8,521
Total	75.90%	$206,074	$206,074

2013 Leading Make/Model

			MKT SHR%	UNITS
2013	CHEV	SLV	33.96%	288
2013	DODG	XXX	95.00%	266
2013	TOYT	TUN	47.80%	174
2013	FORD	F15	32.70%	171
2013	TOYT	TAC	47.04%	159

2013 AVG PRICE DISTRICT vs. STATE



2013 Leading Lenders

	MKT SHR%	CONTRACTS	YTD
POTLATCH #1 FED CR UN	16.06%	2,827	2,827
WELLS FARGO DEALER SERVICES	5.61%	987	987
NUMERICA CREDIT UNION	5.16%	908	908
TOYOTA MOTOR CREDIT	5.16%	908	908
SPOKANE TEACHERS CR UN	3.89%	685	685
ALLY BANK	3.65%	642	642
PARKER AUTO CREDIT	3.14%	552	552
JP MORGAN CHASE	3.05%	536	536
PHOENIX FINANCIAL LLC	2.73%	481	481
RELIABLE CREDIT ASSOCIATION	1.56%	274	274

2013 Leading Lender Segments

	MKT SHR%	CONTRACTS	YTD
CREDIT UNION	28.21%	4,965	4,965
NON-CAPTIVE FINANCE	21.72%	3,823	3,823
CAPTIVE	9.70%	1,707	1,707
BUY HERE PAY HERE	5.49%	966	966

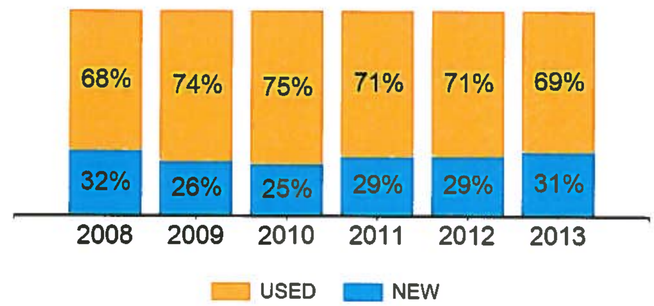
Trends Intell 2013

Dealer District: 2; Body Type: CAR, TRUCK; New/Used: ALL

State Of The Industry 2013 - 2012

	2013	2012
NEW		
Avg Sales / Dealership	$4,226,048	$4,405,793
Total Sales All Dealerships	$50,712,580	$48,463,718
Total Tax Collected All Dealerships	$2,397,006	$2,227,149
USED		
Avg Sales / Dealership	$1,115,436	$1,011,626
Total Sales All Dealerships	$54,656,344	$53,616,180
Total Tax Collected All Dealerships	$2,648,746	$2,623,813

Yearly Trend



2013 Leading Dealers by Units

	MKT SHR%	UNITS	YTD
ROGERS MOTORS	16.45%	1,006	1,006
KENDALL CHEVROLET/SUBARU	14.93%	913	913
JOE HALL FORD NISSAN	12.03%	736	736
KENDALL DODGE CHRYSLER JEEP	10.71%	655	655
GORTSEMA MOTORS INC	5.26%	322	322
MICK MCCLURE HONDA	5.13%	314	314
WYSUP HYUNDAI	4.91%	300	300
AMBASSADOR AUTO SERVICE	4.81%	294	294
VALLEY CAR SALES INC	3.45%	211	211
Total	77.68%	4,751	4,751

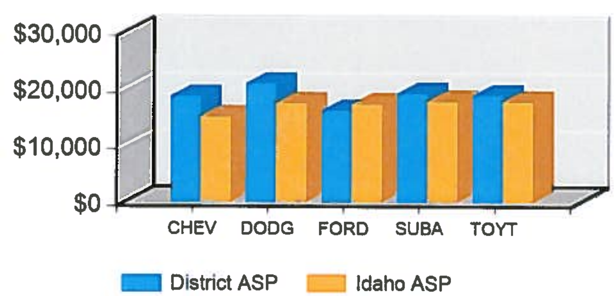
2013 Leading Dealers by $(K)

	MKT SHR%	DOLLARS	YTD
KENDALL CHEVROLET/SUBARU	19.78%	$20,846	$20,846
ROGERS MOTORS	18.84%	$19,855	$19,855
KENDALL DODGE CHRYSLER JEEP	14.23%	$14,990	$14,990
JOE HALL FORD NISSAN	13.42%	$14,138	$14,138
MICK MCCLURE HONDA	6.70%	$7,061	$7,061
WYSUP HYUNDAI	5.21%	$5,490	$5,490
GORTSEMA MOTORS INC	4.97%	$5,239	$5,239
AMBASSADOR AUTO SERVICE	4.55%	$4,799	$4,799
HANSON GARAGE	2.76%	$2,905	$2,905
Total	90.47%	$95,324	$95,324

2013 Leading Make/Model

			MKT SHR%	UNITS
2014	SUBA	FOR	48.48%	96
2013	CHEV	SLV	28.66%	94
2013	SUBA	OUT	65.94%	91
2013	FORD	F15	37.91%	80
2013	TOYT	TUN	44.94%	80

2013 AVG PRICE DISTRICT vs. STATE



2013 Leading Lenders

	MKT SHR%	CONTRACTS	YTD
POTLATCH #1 FED CR UN	31.44%	1,923	1,923
TOYOTA MOTOR CREDIT	4.94%	302	302
LEWIS CLARK CREDIT UNION	4.63%	283	283
JP MORGAN CHASE	3.11%	190	190
WELLS FARGO DEALER SERVICES	1.91%	117	117
FORD MOTOR CREDIT	1.88%	115	115
PINE TREE COMMUNITY CR UN	1.52%	93	93
AMERICAN HONDA FINANCIAL	1.50%	92	92
KAMIAH COMMUNITY CREDIT UN	1.42%	87	87
NUMERICA CREDIT UNION	1.08%	66	66

2013 Leading Lender Segments

	MKT SHR%	CONTRACTS	YTD
CREDIT UNION	43.74%	2,675	2,675
NON-CAPTIVE FINANCE	11.27%	689	689
CAPTIVE	10.38%	635	635
BUY HERE PAY HERE	1.60%	98	98

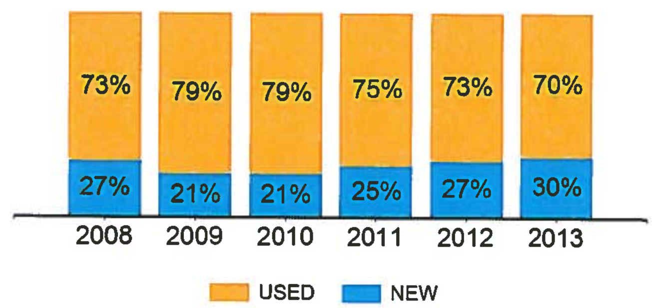
Trends Intell 2013

Dealer District: 3; Body Type: CAR, TRUCK; New/Used: ALL

State Of The Industry 2013 - 2012

	2013	2012
NEW		
Avg Sales / Dealership	$14,743,421	$12,862,462
Total Sales All Dealerships	$501,276,298	$463,048,624
Total Tax Collected All Dealerships	$23,472,290	$21,315,550
USED		
Avg Sales / Dealership	$1,397,852	$1,407,550
Total Sales All Dealerships	$532,581,521	$530,646,196
Total Tax Collected All Dealerships	$26,737,689	$26,137,256

Yearly Trend



2013 Leading Dealers by Units

	MKT SHR%	UNITS	YTD
EDMARK SUPERSTORE/ KIA	5.91%	3,972	3,972
LITHIA FORD LINCOLN OF BOISE	4.86%	3,269	3,269
DENNIS DILLON AUTO PARK & TRUCK CTR	4.39%	2,950	2,950
BRONCO MOTORS	4.06%	2,730	2,730
DAN WIEBOLD FORD	3.98%	2,678	2,678
PETERSON AUTOPLEX	3.78%	2,541	2,541
KENDALL FORD OF MERIDIAN	3.10%	2,082	2,082
LARRY MILLER HONDA	2.96%	1,992	1,992
TOM SCOTT MOTORS	2.71%	1,824	1,824
PRIVATE PARTY	0.01%	5	5
Total	35.75%	24,043	24,043

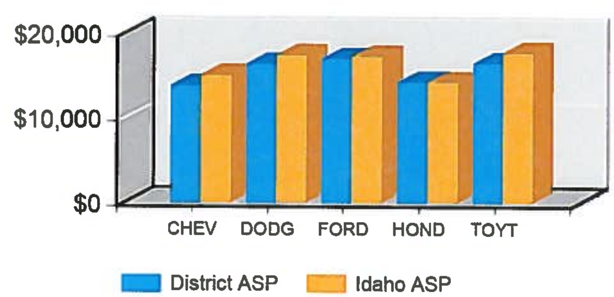
2013 Leading Dealers by $(K)

	MKT SHR%	DOLLARS	YTD
EDMARK SUPERSTORE/ KIA	8.10%	$83,748	$83,748
LITHIA FORD LINCOLN OF BOISE	6.97%	$72,039	$72,039
PETERSON AUTOPLEX	5.81%	$60,036	$60,036
DAN WIEBOLD FORD	5.55%	$57,388	$57,388
DENNIS DILLON AUTO PARK & TRUCK CTR	5.06%	$52,271	$52,271
BRONCO MOTORS	4.69%	$48,443	$48,443
KENDALL FORD OF MERIDIAN	4.65%	$48,125	$48,125
LARRY MILLER CHY JEEP DODGE RAM	4.06%	$41,938	$41,938
PETERSONS STAMPEDE DODGE CHRY JEEP	3.65%	$37,783	$37,783
PRIVATE PARTY	0.00%	$37	$37
Total	48.54%	$501,806	$501,806

2013 Leading Make/Model

			MKT SHR%	UNITS
2013	FORD	F15	52.99%	1,604
2013	DODG	XXX	91.73%	577
2013	CHEV	SLV	25.03%	420
2013	HOND	CRV	52.52%	396
2013	FORD	ECP	39.44%	394

2013 AVG PRICE DISTRICT vs. STATE



2013 Leading Lenders

	MKT SHR%	CONTRACTS	YTD
IDAHO CENTRAL CREDIT UNION	12.36%	8,312	8,312
WELLS FARGO DEALER SERVICES	6.66%	4,480	4,480
JP MORGAN CHASE	2.87%	1,933	1,933
CAPITAL EDUCATORS FED CR UN	2.85%	1,920	1,920
FORD MOTOR CREDIT	2.71%	1,825	1,825
ICON CREDIT UNION	2.09%	1,403	1,403
BANK OF AMERICA	1.93%	1,299	1,299
RELIABLE CREDIT ASSOCIATION	1.93%	1,297	1,297
TOYOTA MOTOR CREDIT	1.77%	1,191	1,191
AMERICAN HONDA FINANCIAL	1.73%	1,166	1,166

2013 Leading Lender Segments

	MKT SHR%	CONTRACTS	YTD
NON-CAPTIVE FINANCE	26.23%	17,645	17,645
CREDIT UNION	23.77%	15,986	15,986
CAPTIVE	9.92%	6,671	6,671
BUY HERE PAY HERE	6.68%	4,496	4,496

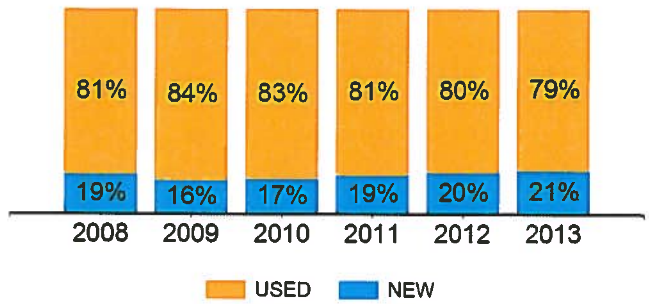
Trends Intell 2013

Dealer District: 4; Body Type: CAR, TRUCK; New/Used: ALL

State Of The Industry 2013 - 2012

	2013	2012
NEW		
Avg Sales / Dealership	$4,797,667	$4,716,744
Total Sales All Dealerships	$86,358,001	$89,618,136
Total Tax Collected All Dealerships	$3,808,979	$4,129,347
USED		
Avg Sales / Dealership	$818,734	$872,969
Total Sales All Dealerships	$131,816,131	$137,056,147
Total Tax Collected All Dealerships	$6,515,460	$6,764,028

Yearly Trend



2013 Leading Dealers by Units

	MKT SHR%	UNITS	YTD
GOODE MOTOR	5.82%	840	840
MIDDLEKAUFF FORD LINCOLN	5.69%	821	821
BONANZA MOTORS	5.19%	749	749
CON PAULOS	4.92%	710	710
LITHIA CHY JEEP DODGE OF TWIN FALLS	4.68%	676	676
CAR STORE LLC, THE	4.66%	673	673
WILLS TOYOTA	4.66%	672	672
ROB GREEN NISSAN HYUNDAI	4.09%	591	591
RANDY HANSEN AUTOMOTIVE	4.07%	587	587
PRIVATE PARTY	0.01%	1	1
Total	43.79%	6,320	6,320

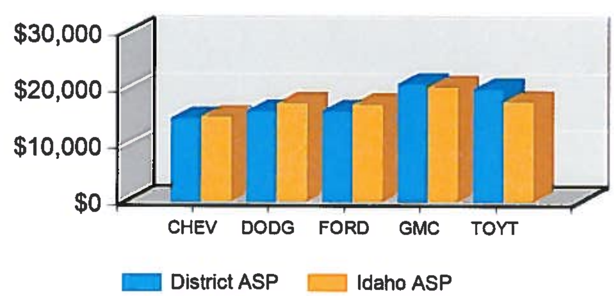
2013 Leading Dealers by $(K)

	MKT SHR%	DOLLARS	YTD
MIDDLEKAUFF FORD LINCOLN	9.08%	$19,816	$19,816
BONANZA MOTORS	7.64%	$16,676	$16,676
LITHIA CHY JEEP DODGE OF TWIN FALLS	7.35%	$16,031	$16,031
GOODE MOTOR	7.30%	$15,936	$15,936
WILLS TOYOTA	7.17%	$15,645	$15,645
ROB GREEN BUICK GMC	6.09%	$13,290	$13,290
CON PAULOS	5.46%	$11,912	$11,912
RANDY HANSEN AUTOMOTIVE	5.33%	$11,634	$11,634
ROB GREEN NISSAN HYUNDAI	5.25%	$11,448	$11,448
PRIVATE PARTY	0.01%	$22	$22
Total	60.69%	$132,411	$132,411

2013 Leading Make/Model

			MKT SHR%	UNITS
2013	FORD	F15	42.19%	297
2013	GMC	SRA	33.33%	141
2013	CHEV	SLV	24.82%	140
2013	DODG	XXX	92.55%	87
2013	TOYT	CAM	30.92%	64

2013 AVG PRICE DISTRICT vs. STATE



2013 Leading Lenders

	MKT SHR%	CONTRACTS	YTD
IDAHO CENTRAL CREDIT UNION	12.06%	1,740	1,740
WELLS FARGO DEALER SERVICES	6.96%	1,004	1,004
JP MORGAN CHASE	2.67%	386	386
WESTMARK CREDIT UNION	2.56%	369	369
FORD MOTOR CREDIT	2.01%	290	290
TD AUTO FINANCE	1.99%	287	287
GOODWILL FINANCE	1.63%	235	235
ALL ABOUT AUTOS	1.59%	230	230
ALLY BANK	1.45%	210	210
BANK OF AMERICA	1.30%	187	187

2013 Leading Lender Segments

	MKT SHR%	CONTRACTS	YTD
NON-CAPTIVE FINANCE	26.52%	3,827	3,827
CREDIT UNION	19.30%	2,786	2,786
BUY HERE PAY HERE	13.74%	1,983	1,983
CAPTIVE	5.64%	814	814

DEALER INTELLIGENCE

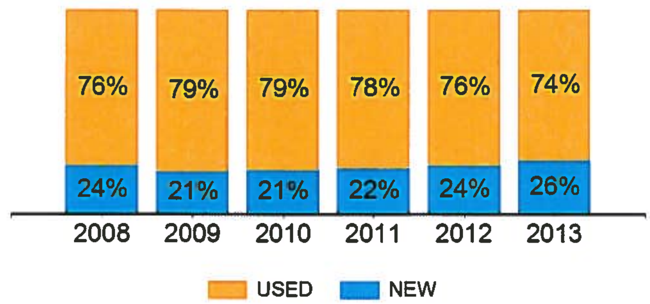
Trends Intell 2013

Dealer District: 5; Body Type: CAR, TRUCK; New/Used: ALL

State Of The Industry 2013 - 2012

	2013	2012
NEW		
Avg Sales / Dealership	$5,724,747	$5,399,707
Total Sales All Dealerships	$223,265,125	$215,988,265
Total Tax Collected All Dealerships	$9,173,849	$8,838,059
USED		
Avg Sales / Dealership	$1,046,478	$1,107,348
Total Sales All Dealerships	$275,223,778	$291,232,563
Total Tax Collected All Dealerships	$13,379,031	$13,828,374

Yearly Trend



2013 Leading Dealers by Units

	MKT SHR%	UNITS	YTD
TETON TOYOTA	6.18%	1,880	1,880
PHIL MEADOR TOYOTA SUBARU	4.70%	1,430	1,430
COURTESY FORD LINCOLN	3.71%	1,130	1,130
SMITH CHEVROLET	3.26%	991	991
WACKERLI AUTO CENTER	3.14%	954	954
BROADWAY FORD	2.53%	769	769
COLE CHEVROLET	2.51%	763	763
HIRNING BUICK GMC	2.24%	682	682
RON SAYERS CHRY JEEP DODGE	2.21%	672	672
PRIVATE PARTY	0.03%	8	8
Total	30.50%	9,279	9,279

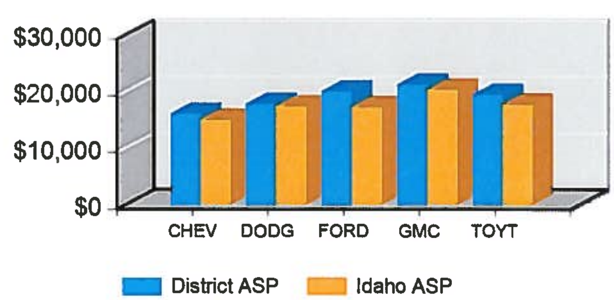
2013 Leading Dealers by $(K)

	MKT SHR%	DOLLARS	YTD
TETON TOYOTA	7.56%	$37,676	$37,676
PHIL MEADOR TOYOTA SUBARU	5.95%	$29,638	$29,638
COURTESY FORD LINCOLN	5.65%	$28,188	$28,188
SMITH CHEVROLET	4.21%	$20,973	$20,973
WACKERLI AUTO CENTER	4.16%	$20,724	$20,724
BROADWAY FORD	3.64%	$18,163	$18,163
RON SAYERS CHRY JEEP DODGE	3.42%	$17,025	$17,025
HIRNING BUICK GMC	3.41%	$17,013	$17,013
TODD HUNZEKER FORD	3.28%	$16,353	$16,353
PRIVATE PARTY	0.02%	$104	$104
Total	41.30%	$205,858	$205,858

2013 Leading Make/Model

			MKT SHR%	UNITS
2013	FORD	F15	46.69%	607
2013	CHEV	SLV	26.59%	438
2013	GMC	SRA	27.98%	263
2013	DODG	XXX	87.06%	222
2013	TOYT	CAM	29.96%	204

2013 AVG PRICE DISTRICT vs. STATE



2013 Leading Lenders

	MKT SHR%	CONTRACTS	YTD
IDAHO CENTRAL CREDIT UNION	9.28%	2,823	2,823
WESTMARK CREDIT UNION	8.88%	2,703	2,703
WELLS FARGO DEALER SERVICES	4.65%	1,414	1,414
TOYOTA MOTOR CREDIT	4.09%	1,244	1,244
FORD MOTOR CREDIT	3.02%	919	919
BEEHIVE FEDERAL CREDIT UNION	2.15%	653	653
M A C U	2.04%	620	620
JP MORGAN CHASE	1.85%	564	564
EAST IDAHO CR UN	1.80%	549	549
SCENIC FALLS FEDERAL CR UN	1.47%	446	446

2013 Leading Lender Segments

	MKT SHR%	CONTRACTS	YTD
CREDIT UNION	32.34%	9,838	9,838
NON-CAPTIVE FINANCE	16.83%	5,120	5,120
CAPTIVE	11.26%	3,425	3,425
BUY HERE PAY HERE	5.18%	1,576	1,576