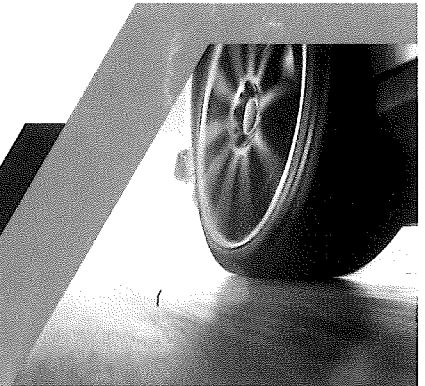


THE AUTO CARE INDUSTRY: AN ECONOMIC POWERHOUSE IN ARIZONA

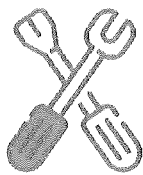
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ECONOMIC IMPACT



Jobs

41,914



Economic Activity

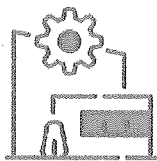
\$6.2B



Wages

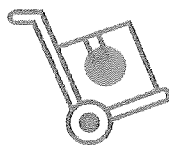
\$2.6B

FACILITIES



Manufacturing

104



Wholesale

623



Retail

3,940



Service

4,347

NATIONAL IMPACT *

381.1B in sales; employs **4.6M** people; and contributes **2%** to GDP.



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Source: John Dunham & Associates 2017, New York, NY

*National Impact Data via 2018 Digital Auto Care Factbook

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Economic Impact of the Auto Care Industry

Arizona

Direct Economic Impact	Jobs	Wages	Output
Manufacturing	2,515	\$242,962,000	\$1,333,572,700
Wholesaling	2,527	\$220,687,000	\$609,595,900
Retailing	36,872	\$2,183,335,200	\$4,218,003,600
Total	41,914	\$2,646,984,200	\$6,161,172,200

Supplier Impact	Jobs	Wages	Output
Agriculture	270	\$16,736,100	\$25,162,700
Mining	348	\$42,424,400	\$205,397,700
Construction	373	\$21,245,200	\$69,717,600
Manufacturing	6,214	\$413,092,000	\$2,871,198,600
Transportation/Communications	2,490	\$188,101,800	\$719,655,500
Wholesale	1,590	\$141,947,700	\$390,488,100
Retail	1,794	\$76,047,300	\$180,825,900
FIRE	3,947	\$181,062,900	\$807,948,100
Business/Personal Services	6,892	\$417,174,900	\$810,207,600
Travel/Entertainment	1,008	\$29,093,600	\$71,838,900
Government	379	\$34,200,900	\$87,563,300
Other	0	\$0	\$0
Total	25,305	\$1,561,126,800	\$6,240,004,000

Induced Economic Impact	Jobs	Wages	Output
Agriculture	660	\$43,216,700	\$87,292,400
Mining	144	\$12,746,100	\$74,983,300
Construction	495	\$27,650,800	\$93,264,400
Manufacturing	1,874	\$114,304,900	\$1,009,207,400
Transportation/Communications	2,199	\$168,892,100	\$770,801,800
Wholesale	1,260	\$109,611,800	\$304,061,300
Retail	5,085	\$193,610,000	\$437,783,100
FIRE	5,806	\$288,946,600	\$1,675,626,200
Business/Personal Services	16,443	\$904,561,900	\$1,633,577,000
Travel/Entertainment	6,045	\$163,315,700	\$430,879,000
Government	565	\$46,926,900	\$149,768,000
Other	653	\$17,207,000	\$35,036,000
Total	41,229	\$2,090,990,500	\$6,702,279,900

Total Economic Impact	Jobs	Wages	Output
Total	108,448	\$6,299,101,500	\$19,103,456,100

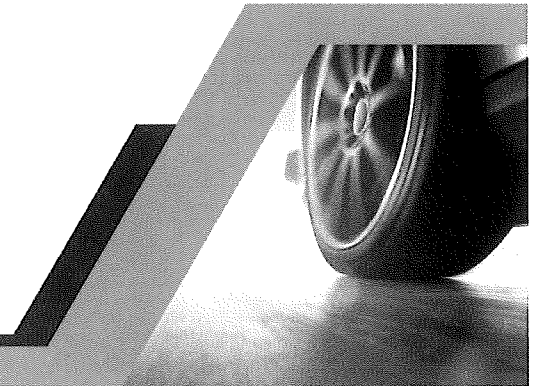
Tax Impact	Business Taxes
Federal Taxes	\$1,444,125,100
State Taxes	\$1,329,816,900
Total Taxes	\$2,773,942,000

THE AUTO CARE INDUSTRY: AN ECONOMIC POWERHOUSE IN NEVADA

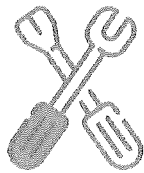
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ECONOMIC IMPACT



Jobs

17,939



Economic Activity

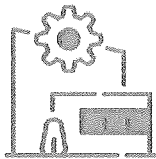
\$2.5B



Wages

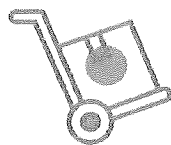
\$1.1B

FACILITIES



Manufacturing

56



Wholesale

291



Retail

1,760



Service

2,016

NATIONAL IMPACT *

381.1B in sales; employs **4.6M** people; and contributes **2%** to GDP.



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Source: John Dunham & Associates 2017, New York, NY

*National Impact Data via 2018 Digital Auto Care Factbook

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Economic Impact of the Auto Care Industry

Nevada

Direct Economic Impact	Jobs	Wages	Output
Manufacturing	933	\$50,379,200	\$346,482,900
Wholesaling	1,716	\$141,615,800	\$398,753,900
Retailing	15,290	\$906,930,200	\$1,777,620,300
Total	17,939	\$1,098,925,200	\$2,522,857,100

Supplier Impact	Jobs	Wages	Output
Agriculture	47	\$2,699,800	\$5,621,100
Mining	320	\$51,381,600	\$182,783,300
Construction	154	\$10,388,500	\$29,634,100
Manufacturing	2,577	\$134,790,600	\$831,447,600
Transportation/Communications	1,064	\$75,875,100	\$291,284,500
Wholesale	622	\$53,130,000	\$147,658,200
Retail	757	\$33,921,900	\$80,409,400
FIRE	1,575	\$48,279,000	\$291,737,700
Business/Personal Services	2,885	\$189,582,400	\$358,688,900
Travel/Entertainment	445	\$16,637,900	\$42,675,600
Government	159	\$14,318,000	\$33,320,500
Other	0	\$0	\$0
Total	10,605	\$631,004,800	\$2,295,260,900

Induced Economic Impact	Jobs	Wages	Output
Agriculture	84	\$5,390,300	\$15,686,500
Mining	98	\$12,423,700	\$42,472,500
Construction	183	\$12,173,600	\$35,589,200
Manufacturing	746	\$40,399,000	\$360,540,300
Transportation/Communications	826	\$61,849,200	\$286,973,000
Wholesale	465	\$38,587,000	\$108,235,200
Retail	1,921	\$74,623,100	\$170,663,900
FIRE	2,085	\$82,179,300	\$595,222,300
Business/Personal Services	5,829	\$332,216,700	\$584,787,700
Travel/Entertainment	2,225	\$72,921,100	\$204,010,400
Government	197	\$17,221,000	\$49,485,500
Other	195	\$6,988,600	\$10,810,200
Total	14,854	\$756,972,600	\$2,464,476,700

Total Economic Impact	Jobs	Wages	Output
Total	43,398	\$2,486,902,600	\$7,282,594,700

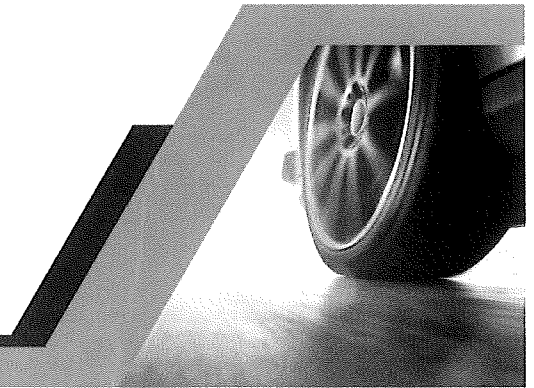
Tax Impact	Business Taxes
Federal Taxes	\$593,118,700
State Taxes	\$643,432,700
Total Taxes	\$1,236,551,400

THE AUTO CARE INDUSTRY: AN ECONOMIC POWERHOUSE IN CALIFORNIA

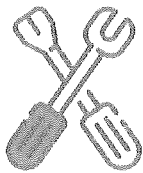
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ECONOMIC IMPACT



Jobs

255,810



Economic Activity

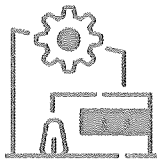
\$41.9B



Wages

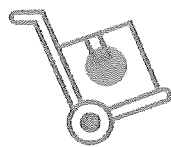
\$16.7B

FACILITIES



Manufacturing

873



Wholesale

5,595



Retail

23,558



Service

33,008

NATIONAL IMPACT *

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Source: John Dunham & Associates 2017, New York, NY

*National Impact Data via 2018 Digital Auto Care Factbook

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Economic Impact of the Auto Care Industry

California

Direct Economic Impact	Jobs	Wages	Output
Manufacturing	21,837	\$1,566,715,800	\$9,896,312,600
Wholesaling	26,204	\$2,394,605,500	\$6,902,054,300
Retailing	207,769	\$12,732,998,000	\$25,104,073,600
Total	255,810	\$16,694,319,300	\$41,902,440,500

Supplier Impact	Jobs	Wages	Output
Agriculture	2,700	\$186,278,100	\$261,607,000
Mining	873	\$102,911,500	\$555,863,800
Construction	2,320	\$153,716,200	\$441,791,800
Manufacturing	43,593	\$3,445,582,100	\$20,318,785,800
Transportation/Communications	16,911	\$1,705,303,400	\$5,418,666,900
Wholesale	10,970	\$1,023,775,500	\$2,930,827,400
Retail	10,688	\$496,562,600	\$1,197,568,800
FIRE	19,617	\$1,198,538,500	\$5,069,183,200
Business/Personal Services	45,184	\$3,586,866,300	\$6,424,475,300
Travel/Entertainment	6,335	\$240,964,100	\$509,990,500
Government	2,417	\$255,216,400	\$551,743,000
Other	0	\$0	\$0
Total	161,608	\$12,395,714,700	\$43,680,503,500

Induced Economic Impact	Jobs	Wages	Output
Agriculture	6,496	\$612,216,800	\$978,523,100
Mining	628	\$82,176,400	\$411,186,300
Construction	2,773	\$181,750,000	\$534,234,300
Manufacturing	13,381	\$1,178,876,900	\$8,472,147,000
Transportation/Communications	13,025	\$1,371,427,100	\$5,228,741,100
Wholesale	7,621	\$696,816,800	\$2,008,319,500
Retail	28,025	\$1,192,656,900	\$2,688,677,000
FIRE	28,683	\$2,083,759,200	\$10,411,205,400
Business/Personal Services	94,558	\$5,908,600,800	\$10,440,742,500
Travel/Entertainment	35,013	\$1,139,429,400	\$2,753,686,900
Government	3,194	\$340,870,000	\$838,308,500
Other	4,082	\$99,154,800	\$210,194,100
Total	237,479	\$14,887,735,100	\$44,975,965,700

Total Economic Impact	Jobs	Wages	Output
Total	654,897	\$43,977,769,100	\$130,558,909,700

Tax Impact	Business Taxes
Federal Taxes	\$10,620,895,800
State Taxes	\$10,881,121,800
Total Taxes	\$21,502,017,600