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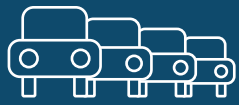
April 2022

Market View

For the latest insights from eBay Motors Group

Welcome to our monthly Market View. We've analysed activity across the eBay Motors Group to provide insights into stock, price, days to sell and demand by consumers based on what they are viewing, including: manufacturers, models and the increasing interest in electric and hybrid vehicles. We look at comparison time periods so that you can spot emerging trends on a month-by-month basis.

For information about advertising and content marketing opportunities on our expanded eBay Motors Group portfolio including Motors.co.uk, Gumtree Motors, eBay Motors, RAC Cars, Parkers and Top Gear, please call our team on **0203 966 2711** or email us at AdvertiseSmarter@ebaymotorsgroup.co.uk



Stock

April 2022

At a glance

- Stock volumes have gradually recovered in 2022, with average listings up +3% MoM and up +1% YoY as part-exchange vehicles come into the market.
- Franchised and Independent dealers saw stock increase by more than +3% MoM, with Supermarkets seeing a small drop MoM and YoY.
- Hybrid vehicles saw most volume movement YoY with listings up +14%. Petrol saw a small drop on market share at the expense of diesels with little change in Electric volume.

Stock volume per dealership

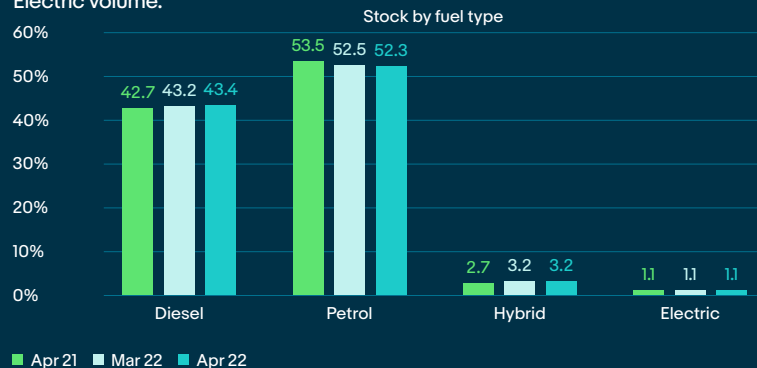
Stock volumes have gradually recovered in 2022, with average listings up +3% MoM and up +1% YoY as part-exchange vehicles come into the market.

47.7

Mar 22: 46.2 MoM: +3.0%
Apr 21: 47.2 YoY: +1.0%

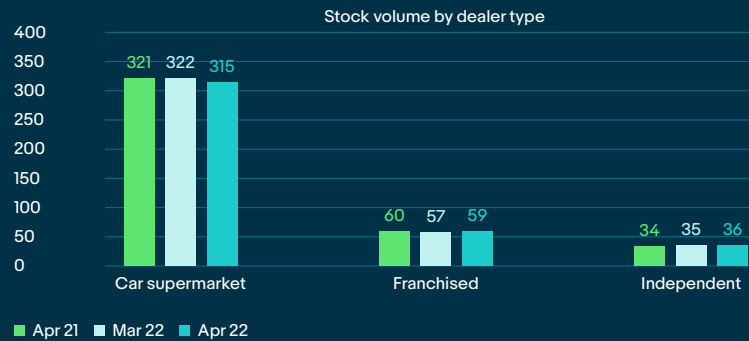
Stock volume by fuel type

Hybrid vehicles saw most volume movement YoY with listings up +14%. Petrol saw a small drop on market share at the expense of diesels with little change in Electric volume.



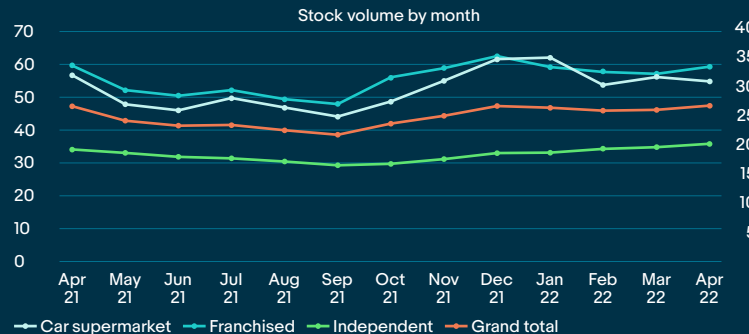
Stock volume by dealer type

Franchised and Independent dealers saw stock increase by more than +3% MoM, with Supermarkets seeing a small drop MoM and YoY.



Stock volume trend per dealership

Supermarkets saw a small decline MoM in listings volume but many dealers continue to see a slight increase with average volume per dealer up +3.3% MoM.



“Despite the Easter holidays and the significant rise in energy costs, April showed signs of continued stability for the used car market with year-on-year and month-on-month improvements in stock levels and days to sell.”

Dermot Kelleher,

Head of Marketing and Research, eBay Motors Group



Data from vehicles listed on Motors.co.uk and eBay Motors Group.



Price

April 2022

At a glance

- Average vehicle list prices continue to show slight MoM decreases in 2022, with overall average list prices down -1.5% MoM, although still +19% up YoY.
- Franchised dealers and Supermarkets but saw average prices fall by up to -3% MoM, whilst Independents continue to see very little change.
- Average prices for most selected make/models (less than 30k miles and < 3 years old) were down by up to -3.7% MoM, with the BMW 3 Series the exception up +2.4% MoM.

Average vehicle price

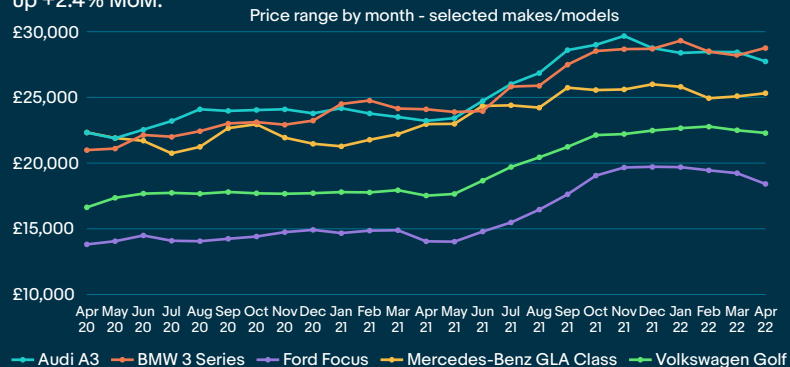
Average vehicle list prices continue to show slight MoM decreases in 2022, with overall average list prices down -1.5% MoM, although still +19% up YoY.

£17,290

Mar 22: **£17,549** MoM: **-1.5%**
 Apr 21: **£14,512** YoY: **+19.1%**

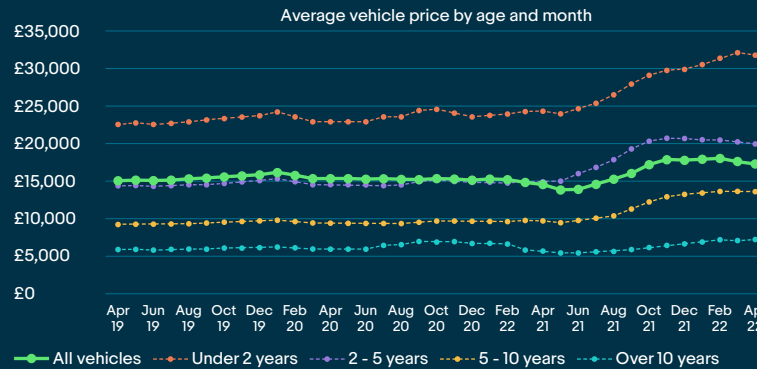
Average price by month – selected makes/models

Average prices for most selected make/models (less than 30k miles and < 3 years old) were down by up to -3.7% MoM, with the BMW 3 Series the exception up +2.4% MoM.



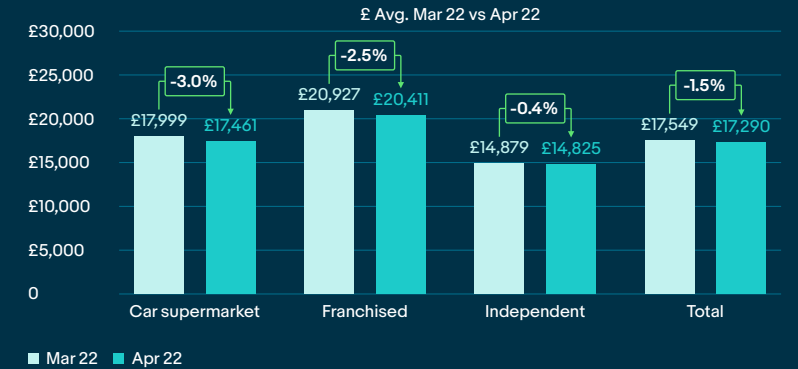
Average listing price over time

The overall dip of 1.1% in average listing prices for the month was led by cars aged up to five years old.



Average price of vehicles on Motors.co.uk by dealer type

Franchised dealers and Supermarkets but saw average prices fall by up to -3% MoM, whilst Independents continue to see very little change.



Top 5 price movers

Top 5 makes/models by MoM increase and decrease in price.

Increase

Make	Model	Age band	Fuel type	Apr stock	Apr avg price	% change
Ford	KA	12 - 14 yrs	Petrol	130	£3,357	20.0%
BMW	3 Series	12 - 14 yrs	Diesel	147	£6,451	13.8%
Vauxhall	Astra	12 - 14 yrs	Petrol	175	£3,707	11.6%
BMW	3 Series	12 - 14 yrs	Petrol	153	£7,793	11.2%
Nissan	Qashqai	10 - 12 yrs	Petrol	105	£7,087	11.0%

Decrease

Make	Model	Age band	Fuel type	Apr stock	Apr avg price	% change
Ford	Focus	5 - 6 yrs	Petrol	345	£14,541	-4.5%
Honda	Civic	14 - 16 yrs	Petrol	109	£3,632	-4.9%
Honda	Civic	6 - 8 yrs	Petrol	100	£12,040	-6.1%
MINI	Hatch	16 - 18 yrs	Petrol	111	£2,876	-11.9%
Nissan	X-Trail	6 - 8 yrs	Diesel	146	£13,921	-17.1%



Data from vehicles listed on Motors.co.uk and eBay Motors Group.



Demand

April 2022

At a glance

- Average days to sell decreased by almost 3 days YoY as consumer demand and continued supply challenges maintain a competitive marketplace.
- Independents saw a slight increase in Days to Sell MoM whilst Franchised and Supermarkets saw a decrease.
- Days to Sell decreased by up to -6% MoM with only vehicles over £40k seeing a slight slowdown with vehicles selling on average in 45.5 days.

Average days to sell

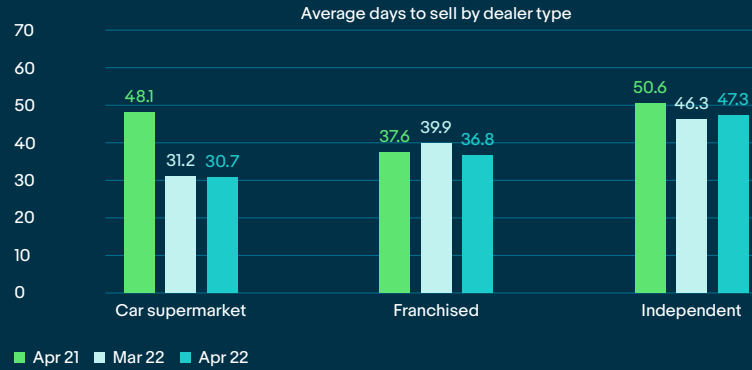
Average days to sell decreased by almost 3 days YoY as consumer demand and continued supply challenges maintain a competitive marketplace.

40.3

Mar 22: 41.4 MoM: -2.7%
Apr 21: 43.2 YoY: -6.7%

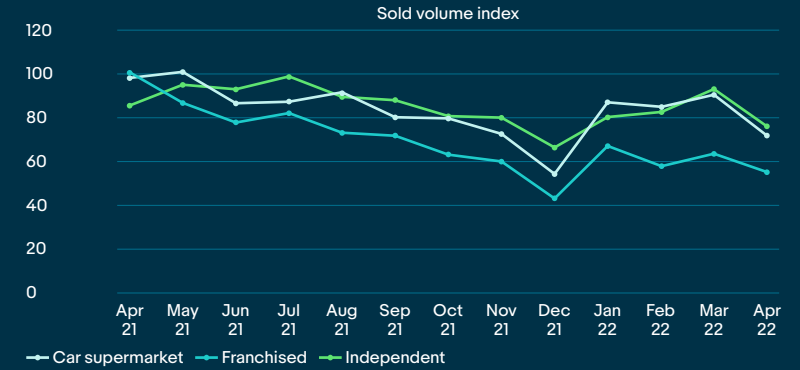
Average days to sell by dealer type

Independents saw a slight increase in Days to Sell MoM whilst Franchised and Supermarkets saw a decrease.



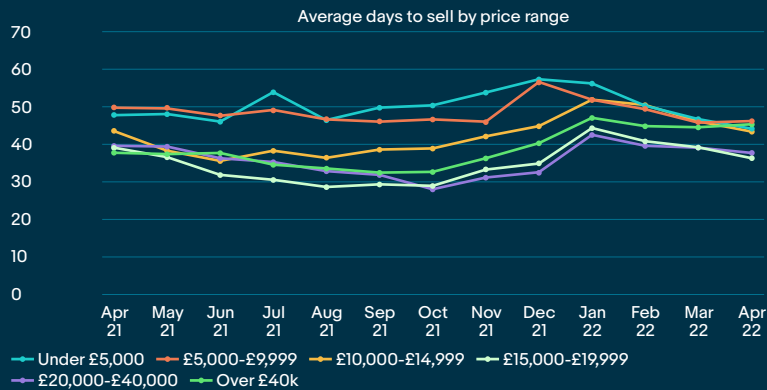
Sold volume index by dealer type

Indexed volume of sold stock shows a similar trend across dealer types as supply and consumer demand have resulted in a recent trend of declining volumes.



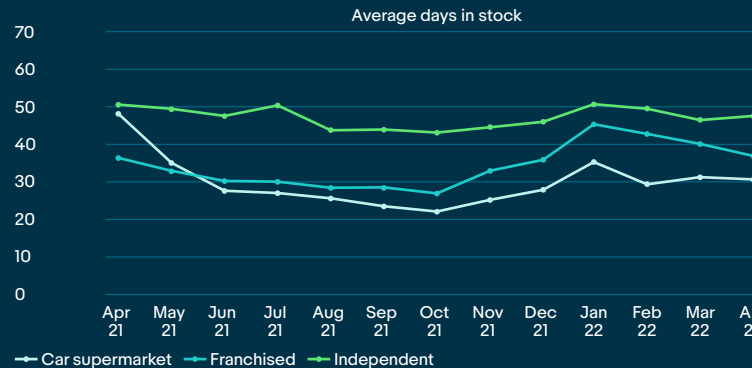
Average days to sell by price

Days to Sell decreased by up to -6% MoM with only vehicles over £40k seeing a slight slowdown with vehicles selling on average in 45.5 days.



Average days in stock by dealer type

Days to sell increased MoM for Independents but Franchised and Supermarkets saw decreases in days to sell.



MOTORS
.co.uk



Data from vehicles listed on Motors.co.uk and eBay Motors Group.



Demand

April 2022

At a glance

- Ford, BMW and Volkswagen listings generate most vehicle views on eMG sites, with BMW, Mercedes-Benz, Audi & Land Rover all seeing strong growth in share MoM.
- Fastest selling vehicle list in April 22 was dominated by small, petrol vehicles, selling in under 23 days, with Fiesta and Corsa featuring strongly.
- Petrol vehicles make up over half of all listed stock and vehicle views. April 22 saw a decrease in days to sell across all fuel types YoY.

Top 10 most viewed manufacturers

Ford, BMW & Volkswagen listings generate most vehicle views on eMG sites, with BMW, Mercedes-Benz, Audi & Land Rover all seeing strong growth in share MoM.

Rank	Manufacturer	Apr 21	Mar 22	Apr 22
1	Ford	12.8%	13.4%	12.8%
2	BMW	9.5%	9.2%	9.5%
3	Volkswagen	9.0%	9.3%	9.1%
4	Mercedes-Benz	9.6%	8.4%	8.5%
5	Audi	7.5%	7.4%	7.7%
6	Vauxhall	5.8%	5.7%	5.6%
7	Land Rover	4.6%	4.3%	4.4%
8	Toyota	3.3%	3.6%	3.6%
9	Nissan	3.8%	3.5%	3.4%
10	Peugeot	2.9%	2.9%	2.8%

Top 10 fastest selling makes/models

Fastest selling vehicle list in April 22 was dominated by small, petrol vehicles, selling in under 23 days, with Fiesta and Corsa featuring strongly.

Rank	Make	Model	Age band	Fuel type	Mileage	Avg days to sell
1	Volkswagen	Golf	6 - 8 yrs	Diesel	60 - 80k	15.8
2	BMW	1 Series	6 - 8 yrs	Diesel	60 - 80k	18.5
3	Ford	Fiesta	6 - 8 yrs	Petrol	40 - 50k	21.1
4	Ford	Fiesta	6 - 8 yrs	Petrol	50 - 60k	21.6
5	Ford	Fiesta	5 - 6 yrs	Petrol	40 - 50k	22.3
6	Mercedes-Benz	GLA Class	3 - 4 yrs	Petrol	20 - 30k	22.4
7	Vauxhall	Corsa	3 - 4 yrs	Petrol	30 - 40k	22.7
8	Vauxhall	Corsa	2 - 3 yrs	Petrol	20 - 30k	22.8
9	Ford	Fiesta	6 - 8 yrs	Petrol	60 - 80k	22.9
10	Ford	Fiesta	5 - 6 yrs	Petrol	30 - 40k	23.1

Vehicle listings, days to sell and ad views by fuel type

Petrol vehicles make up over half of all listed stock and vehicle views. April 22 saw a decrease in days to sell across all fuel types YoY.

Fuel type	% of listings		Avg days to sell		% of ad views	
	Apr 21	Apr 22	Apr 21	Apr 22	Apr 21	Apr 22
Petrol	53.5%	52.3%	44.0	41.2	52.9%	53.7%
Diesel	42.7%	43.4%	41.5	39.7	44.4%	42.6%
Hybrid	2.7%	3.2%	50.5	35.4	2.0%	2.8%
Electric	1.1%	1.1%	55.0	33.6	0.8%	1.0%
Grand Total	100%	100%	43.2	40.3	100%	100%

Vehicle listings, days to sell and ad views by body style

Medium vehicle sector listings accounted for more than 40% of total listings and 37% of ad views, selling in an average of 39.0 days.

Vehicle sector	% of listings		Avg days to sell		% of ad views	
	Apr 21	Apr 22	Apr 21	Apr 22	Apr 21	Apr 22
Medium	41.3%	44.1%	41.3	39.0	37.4%	37.5%
Small/Supermini	22.4%	22.1%	45.8	38.6	20.7%	21.6%
Prestige	18.3%	17.2%	44.1	40.9	20.1%	18.4%
Large	4.8%	5.6%	41.2	43.9	6.1%	6.9%
Convertible	2.3%	3.3%	43.4	62.5	4.2%	4.8%
MPV	5.0%	3.7%	50.5	38.9	5.5%	5.5%
Estate	5.7%	4.0%	45.9	40.2	6.0%	5.3%
Grand Total	100%	100%	43.2	40.3	100%	100%



Vehicle listings, days to sell and ad views by age

As supply/demand has shifted in the used car market in the last 12 months, so we can see a change to older vehicles listed and more ad views for older stock.

Age	% of listings		Avg days to sell		% of ad views	
	Apr 21	Apr 22	Apr 21	Apr 22	Apr 21	Apr 22
Under 6 mths	3.6%	1.3%	32.6	31.6	2.3%	1.0%
6 mths - 1 yr	5.1%	2.5%	51.6	41.1	2.9%	1.6%
1 - 2 yrs	10.0%	5.6%	53.2	40.3	6.0%	3.0%
10 - 12 yrs	12.5%	11.4%	40.3	42.4	7.8%	4.7%
12 - 14 yrs	20.0%	20.6%	43.3	43.0	12.9%	7.7%
14 - 16 yrs	11.1%	13.9%	43.3	41.1	9.2%	7.2%
16 - 18 yrs	7.5%	9.8%	40.5	35.6	7.4%	7.3%
18 - 20 yrs	10.4%	12.7%	39.6	34.0	13.0%	14.7%
2 - 3 yrs	7.0%	7.8%	42.8	37.2	11.0%	13.9%
3 - 4 yrs	5.3%	5.4%	45.1	41.5	9.5%	12.5%
4 - 5 yrs	3.5%	3.8%	41.2	46.3	7.6%	10.2%
5 - 6 yrs	2.0%	2.7%	41.6	48.5	5.3%	7.8%
6 - 8 yrs	0.9%	1.2%	41.4	48.4	2.8%	4.3%
8 - 10 yrs	0.4%	0.6%	46.2	45.0	1.2%	1.9%
Over 20 yrs	0.5%	0.8%	81.3	74.3	1.2%	2.2%
Grand Total	100%	100%	43.2	40.3	100%	100%



Data from vehicles listed on Motors.co.uk and eBay Motors Group.



Electric/hybrid

April 2022

At a glance

- smart ForTwo Coupe Electric was the fastest selling electric vehicle in April 22, selling on average in around 14 days.
- Renault Captur was the fastest selling hybrid vehicle in April 22, selling on average in 8 days.
- Petrol vehicles accounted for 53% of all listings in April 22 with alternative fuel vehicles accounting for 4.3%.

Electric, sold >10

smart ForTwo Coupe Electric was the fastest selling electric vehicle in April 22, selling on average in around 14 days.

Rank	Make	Model	Days to sell
1	smart	ForTwo Coupe	14.4
2	Mercedes-Benz	B Class	18.3
3	MG	MG5	18.4
4	Volkswagen	Golf	18.8
5	Ford	Mustang Mache	21.6
6	Tesla	Model 3	22.6
7	Vauxhall	Mokka	23.5
8	Porsche	Taycan	24.1
9	Hyundai	Kona	24.9
10	DS Automobiles	DS 3	25.1

Hybrid, sold >10

Renault Captur was the fastest selling hybrid vehicle in April 22, selling on average in 8 days.

Rank	Make	Model	Days to sell
1	Renault	Captur	7.7
2	Cupra	Formentor	10.9
3	Mercedes-Benz	GLE	11.8
4	Hyundai	Tucson	12.5
5	Hyundai	i20	14.4
6	Land Rover	Discovery Sport	15.6
7	BMW	X3	17.6
8	Mercedes-Benz	A Class	18.9
9	Mercedes-Benz	GLC	19.3
10	Land Rover	Range Rover Evoque	19.6

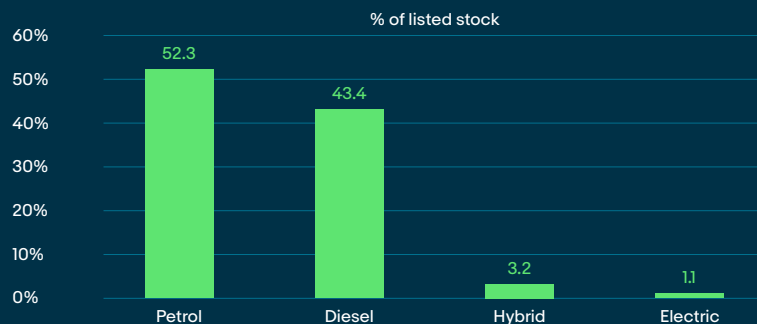
“While hybrid and electric continue to be niche considerations for used car buyers, as measured by ad views and listings, both sold considerably faster than combustion engine cars over the course of the month.”

Dermot Kelleher,

Head of Marketing and Research, eBay Motors Group

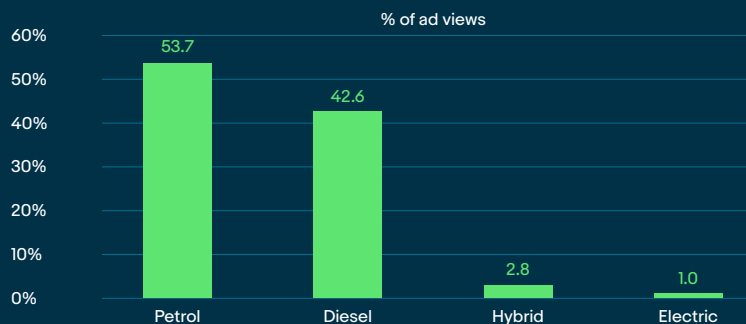
Vehicle listings by fuel type

Petrol vehicles accounted for 53% of all listings in April 22 with alternative fuel vehicles accounting for 4.3%.



Ad views by fuel type

Petrol vehicles accounted for 54% of all ad views in April 22 with alternative fuel vehicles accounting for 3.8%.



Data from vehicles listed on Motors.co.uk and eBay Motors Group.



Electric/hybrid

April 2022

At a glance

- 4-5 year, 10 - 20k mile Nissan Leaf saw the biggest price change MoM with a +6.0% increase to £19,197.
- Mitsubishi Outlander hybrids >80k miles took the top 2 spots of highest price increases for hybrid vehicles, increasing by +4.5% and +4.3% MoM.
- Indexed vehicle views show that interest in electric vehicles has been maintained at a higher rate than 2019. Hybrid interest is also high but has declined from mid-2021 high.

Top 5 price movers - Electric

4-5 year, 10 - 20k mile Nissan Leaf saw the biggest price change MoM with a +6.0% increase to £19,197.

Increase					
Make	Model	Age band	Mileage	Avg price	% change
Nissan	Leaf	4 - 5 yrs	10 - 20k	£19,197	6.0%
Nissan	Leaf	6 - 8 yrs	40 - 50k	£11,726	5.2%
Nissan	Leaf	4 - 5 yrs	40 - 50k	£16,447	3.9%
Audi	E-Tron	6 mths - 1 yr	Under 5k	£70,815	3.8%
Audi	E-Tron	6 mths - 1 yr	5 - 10k	£74,243	3.6%

Decrease					
Make	Model	Age band	Mileage	Avg price	% change
Volkswagen	Golf	3 - 4 yrs	20 - 30k	£20,576	-3.2%
Jaguar	I-Pace	3 - 4 yrs	20 - 30k	£50,627	-3.3%
Nissan	Leaf	4 - 5 yrs	30 - 40k	£16,255	-3.6%
Nissan	Leaf	6 - 8 yrs	20 - 30k	£11,484	-4.5%
Mercedes-Benz	EQA	6 mths - 1 yr	Under 5k	£55,128	-7.7%

Top 5 price movers - Hybrid

Mitsubishi Outlander hybrids >80k miles took the top 2 spots of highest price increases for hybrid vehicles, increasing by +4.5% and +4.3% MoM.

Increase					
Make	Model	Age band	Mileage	Avg price	% change
Mitsubishi	Outlander	6 - 8 yrs	80 - 100k	£13,733	4.5%
Mitsubishi	Outlander	6 - 8 yrs	100 - 120k	£13,255	4.3%
Lexus	RX	Under 6 mths	Under 5k	£63,899	4.1%
Lexus	NX	Under 6 mths	Under 5k	£60,794	4.1%
Lexus	UX	1 - 2 yrs	5 - 10k	£31,481	3.7%

Decrease					
Make	Model	Age band	Mileage	Avg price	% change
Mitsubishi	Outlander	6 - 8 yrs	30 - 40k	£17,915	-4.4%
Toyota	C-HR	6 mths - 1 yr	5 - 10k	£26,617	-4.5%
Honda	Jazz	6 mths - 1 yr	Under 5k	£19,704	-4.9%
Kia	Niro	2 - 3 yrs	5 - 10k	£21,995	-4.9%
Toyota	RAV4	6 mths - 1 yr	5 - 10k	£37,947	-5.7%

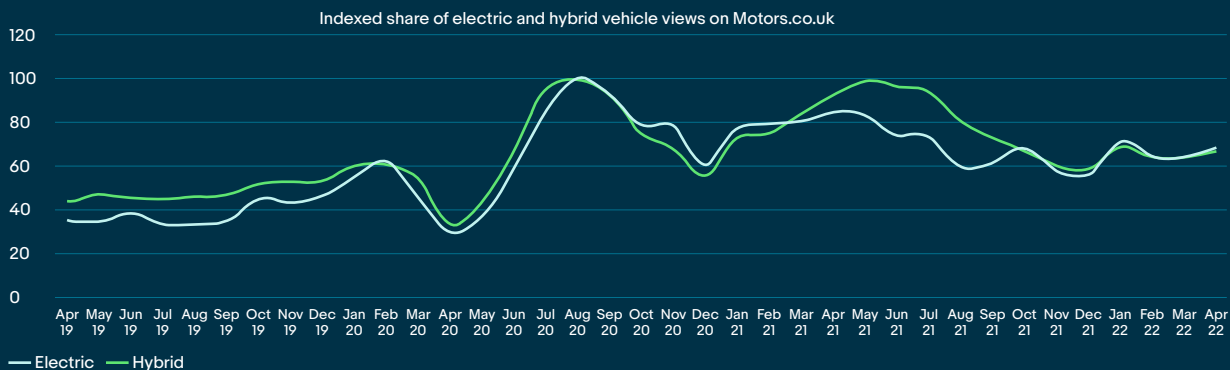
For advertising and marketing opportunities across eBay Motors Group, please call our team on 0203 966 2711 or email us at AdvertiseSmarter@ebaymotorsgroup.co.uk

Formed in January 2020, the eBay Motors Group is an advertising platform for automotive retailers, enabling them to reach millions of buyers across Motors.co.uk, Gumtree Motors and eBay Motors and its network of partner websites.

Whilst car buyers continue to enjoy separate shop windows across the different participating websites, the eBay Motors Group ensures dealers advertising keep pace with these customers across multiple digital touchpoints during the buying journey, all managed via one stock management and response reporting tool and a single point of account management.

Vehicle views over time by fuel type

Indexed vehicle views show that interest in electric vehicles has been maintained at a higher rate than 2019. Hybrid interest is also high but has declined from mid-2021 high.



Data from vehicles listed on Motors.co.uk and eBay Motors Group.