

Market View

For the latest insights from eBay Motors Group.

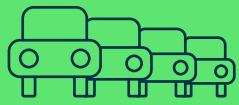
July 2022

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.



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Stock

July 2022

At a glance

- Stock volumes have fallen MoM as supply of cars into the used market continues to be challenging. Overall volumes down -3.7% MoM but +4.0% higher than last year.
- Car supermarket volumes flat MoM and YoY. Franchised and Independent dealers saw decreases in volume MoM with Independents up almost +10% YoY.
- Share of diesel stock in the market has increased YoY with petrol stock dropping from 53.0% to 51.7%. Alternative fuel vehicle share static YoY.

Stock volume per dealership

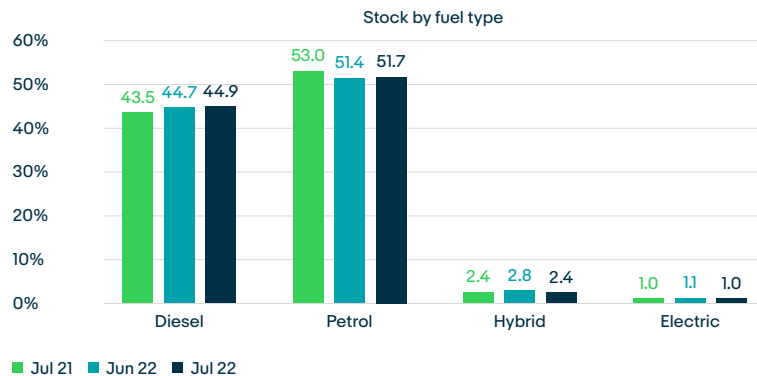
Stock volumes have fallen MoM as supply of cars into the used market continues to be challenging. Overall volumes down -3.7% MoM but +4.0% higher than last year.

43.2

Jun 22: 44.8 MoM: -3.7%
Jul 21: 41.5 YoY: +4.0%

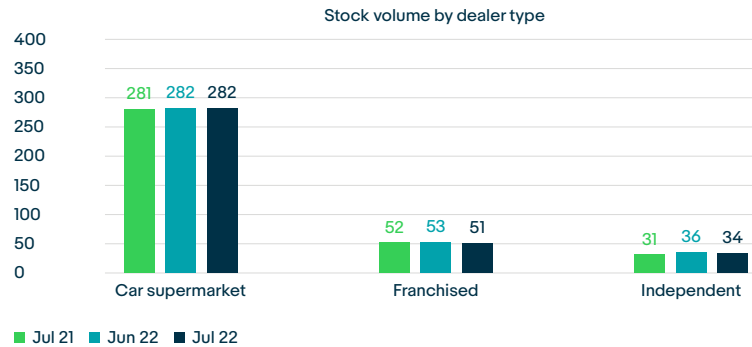
Stock volume by fuel type

Share of diesel stock in the market has increased YoY with petrol stock dropping from 53.0% to 51.7%. Alternative fuel vehicle share static YoY.



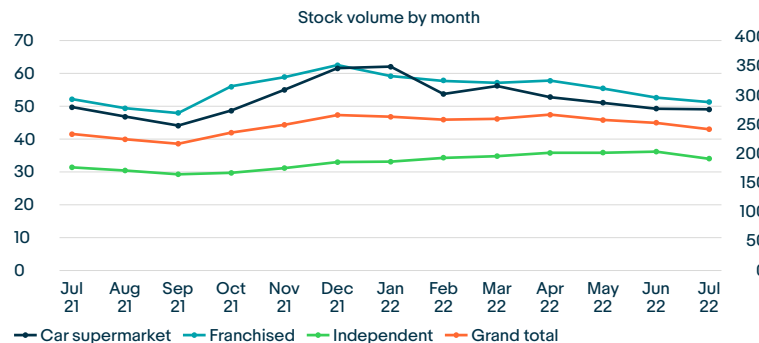
Stock volume by dealer type

Car supermarket volumes flat MoM and YoY. Franchised and Independent dealers saw decreases in volume MoM with Independents up almost +10% YoY.



Stock volume trend per dealership

Independent dealers saw volume down MoM after several months of modest increases. Supermarkets were stable but Franchised dealers seeing slight MoM declines.



“ Dealers are continuing to address the ongoing supply challenges by fighting to maintain consistent inventory levels, with many only able to buy stock to replace sold cars.

Many have done a great job adjusting to the market conditions by maintaining inventory levels and shifting stock efficiently, putting them in a strong position for the summer holiday period.”

Lucy Tugby,
Head of Marketing, Motors

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Price

July 2022

At a glance

- Average vehicle list prices continue to decline from the Jan 22 high (down -7%), although prices for vehicles under 2 years old have shown increases in the last 2 months.
- All dealer types saw average vehicle prices fall MoM by a similar amount, with drops between -0.7% and -1.2%.
- Average prices for selected make/models (less than 30k miles and < 3 years old) were down by up to -1.6% MoM, with Vauxhall Corsa and Honda Civic seeing large MoM increases of +5.7% and +4.3%.

Average vehicle price

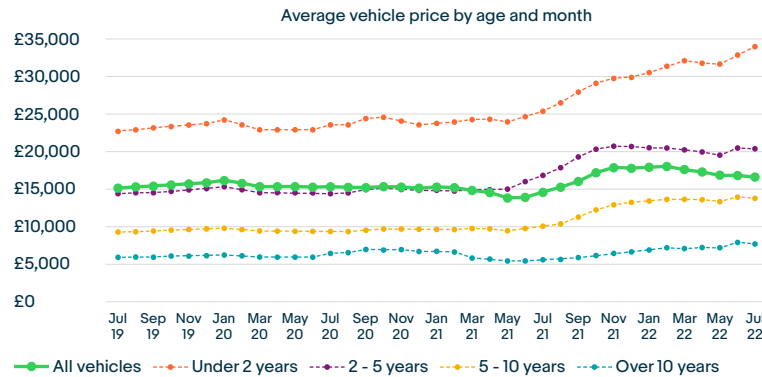
Average vehicle list prices continue to decline from the Jan 22 high (down -7%).

£16,652

Jun 22: **£16,841** MoM: **-1.1%**
 Jul 21: **£14,494** YoY: **+14.9%**

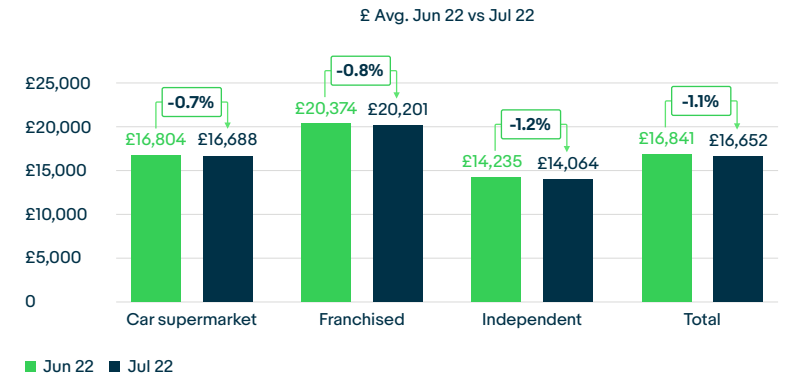
Average listing price over time

Prices for vehicles under 2 years old have shown increases in the last 2 months.



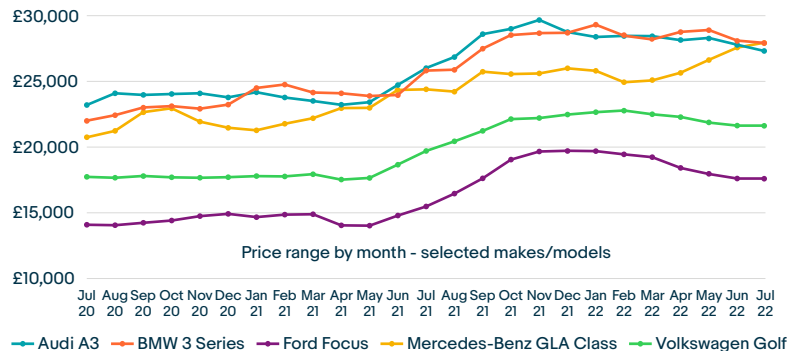
Average price of vehicles on Motors.co.uk by dealer type

All dealer types saw average vehicle prices fall MoM by a similar amount, with drops between -0.7% and -1.2%.



Average price by month - selected makes/models

Average prices for selected make/models (less than 30k miles and < 3 years old) were down by up to -1.6% MoM, with Vauxhall Corsa and Honda Civic seeing large MoM increases of +5.7% and +4.3%.



Top 5 price movers

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

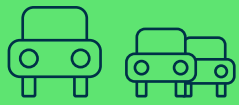
Increase

Make	Model	Age band	Fuel type	Jul stock	Jul avg price	% change
Ford	Mondeo	12 - 14 yrs	Diesel	112	£3,905	8.7%
Land Rover	Discovery	10 - 12 yrs	Diesel	125	£20,193	8.0%
Nissan	Micra	10 - 12 yrs	Petrol	126	£4,393	6.0%
Vauxhall	Zafira	10 - 12 yrs	Petrol	154	£4,290	5.5%
Mercedes-Benz	A Class	2 - 3 yrs	Petrol	217	£29,599	5.5%

Decrease

Make	Model	Age band	Fuel type	Jul stock	Jul avg price	% change
BMW	X3	8 - 10 yrs	Diesel	100	£13,027	-6.6%
MINI	Hatch	8 - 10 yrs	Diesel	118	£7,368	-7.1%
Mazda	MX-5	10 - 12 yrs	Petrol	103	£5,696	-7.5%
Ford	Focus	8 - 10 yrs	Petrol	559	£8,186	-8.3%
Ford	Focus	10 - 12 yrs	Diesel	286	£5,192	-8.5%





Demand

July 2022

At a glance

- Despite supply and price challenges average days to sell fell by -4.1% MoM and -3.3% YoY, showing that demand remains strong for the right stock.
- Generally days to see has been stable in recent month for Independents and Supermarkets. Highest volatility comes from Franchised dealers due to supply and price challenges.
- Indexed volume of sold stock shows a similar trend across dealer types as supply and consumer demand challenges have resulted in a recent trend of declining volumes.

Average days to sell

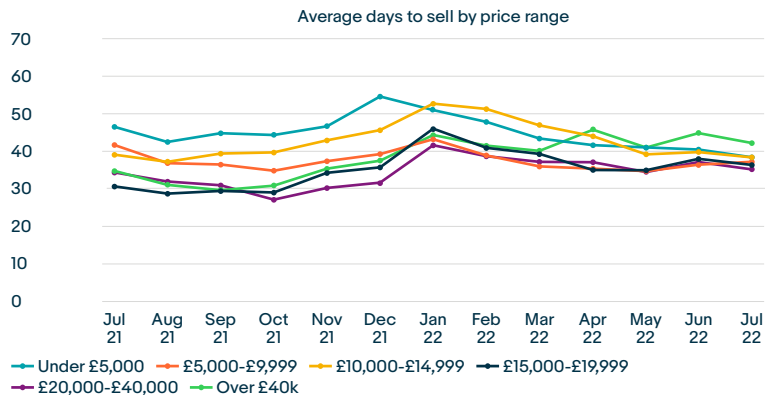
Despite supply and price challenges average days to sell fell by -4.1% MoM and -3.3% YoY, showing that demand remains strong for the right stock.

37.9

Jun 22: 39.5 MoM: -4.1%
Jul 21: 39.2 YoY: -3.3%

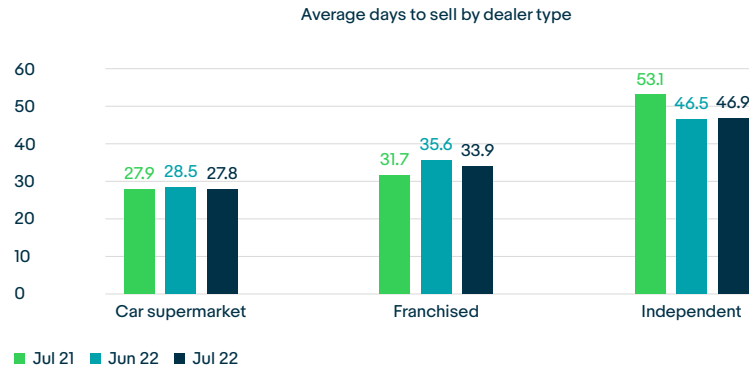
Average days to sell by price

Days to sell decreased by an average of -4.1% MoM in Jul 22 with most vehicle price ranges seeing similar decreases MoM.



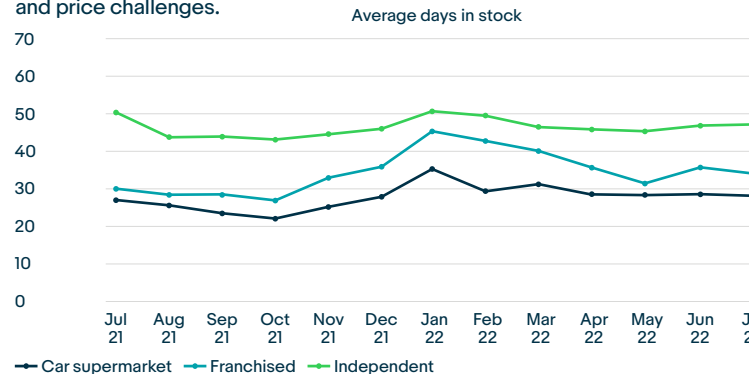
Average days to sell by dealer type

Supermarket and Franchised dealers both saw days to sell decrease MoM in Jul 22, with a small slowdown for Independents since Jun 22.



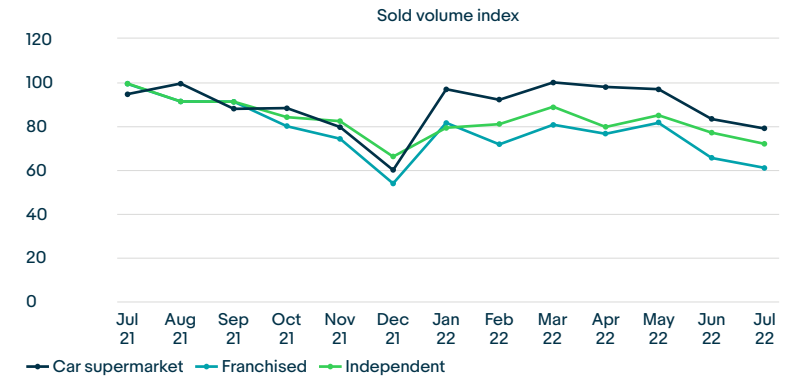
Average days in stock by dealer type

Generally days to sell has been stable in recent month for Independents and Supermarkets. Highest volatility comes from Franchised dealers due to supply and price challenges.



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.





Demand

July 2022

At a glance

- Ford, BMW & Volkswagen listings generate most vehicle views on eMG sites, with BMW, Volkswagen & Vauxhall seeing best growth in share MoM.
- Fastest selling vehicle list in Jul 22 was dominated by sub 5yr and 40k mile vehicles due to increased scarcity of stock available in the market.
- Petrol vehicles make up over half of all stock & vehicle views and although share of stock has dropped back YoY, days to sell and share of vehicle views have increased.

Top 10 most viewed manufacturers

Ford, BMW & Volkswagen listings generate most vehicle views on eMG sites, with BMW, Volkswagen & Vauxhall seeing best growth in share MoM.

Rank	Manufacturer	Jul 21	Jun 22	Jul 22
1	Ford	12.4%	12.5%	12.6%
2	BMW	9.4%	9.5%	9.6%
3	Volkswagen	9.5%	9.4%	9.5%
4	Mercedes-Benz	9.7%	8.7%	8.7%
5	Audi	7.9%	7.9%	7.9%
6	Vauxhall	5.4%	5.4%	5.5%
7	Land Rover	4.8%	4.7%	4.7%
8	Toyota	3.4%	3.6%	3.5%
9	Nissan	3.8%	3.4%	3.2%
10	Peugeot	2.7%	3.0%	3.0%

Top 10 fastest selling makes/models

Fastest selling vehicle list in Jul 22 was dominated by sub 5yr and 40k mile vehicles due to increased scarcity of stock available in the market.

Rank	Make	Model	Age band	Fuel type	Mileage	Avg days to sell
1	BMW	1 Series	3 - 4 yrs	Diesel	20 - 30k	15.2
2	SEAT	Leon	4 - 5 yrs	Petrol	30 - 40k	16.4
3	Toyota	AYGO	2 - 3 yrs	Petrol	10 - 20k	16.5
4	Kia	Sportage	4 - 5 yrs	Petrol	30 - 40k	17.9
5	Mercedes-Benz	A Class	3 - 4 yrs	Diesel	20 - 30k	18.0
6	Mercedes-Benz	A Class	4 - 5 yrs	Diesel	30 - 40k	18.0
7	Vauxhall	Insignia	4 - 5 yrs	Diesel	30 - 40k	18.7
8	Peugeot	3008	3 - 4 yrs	Petrol	20 - 30k	18.7
9	Vauxhall	Adam	4 - 5 yrs	Petrol	30 - 40k	18.8
10	Mercedes-Benz	A Class	2 - 3yrs	Petrol	10 - 20k	19.0

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

Petrol vehicles make up over half of all stock & vehicle views and although share of stock has dropped back YoY, days to sell and share of vehicle views have increased.

Fuel type	% of listings		Avg days to sell		% of ad views	
	Jul 21	Jul 22	Jul 21	Jul 22	Jul 21	Jul 22
Petrol	53.0%	51.7%	39.5	37.2	51.9%	53.2%
Diesel	43.5%	44.9%	37.8	38.3	45.2%	42.9%
Hybrid	2.4%	2.4%	42.5	32.8	2.2%	3.0%
Electric	1.0%	1.0%	48.6	31.4	0.7%	0.9%
Grand Total	100%	100%	39.2	37.9	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 36.0 days.

Vehicle sector	% of listings		Avg days to sell		% of ad views	
	Jul 21	Jul 22	Jul 21	Jul 22	Jul 21	Jul 22
Medium	41.8%	43.4%	36.2	36.0	37.2%	36.9%
Small/Supermini	24.4%	22.4%	40.7	36.6	20.1%	20.3%
Prestige	16.6%	16.3%	38.7	37.9	19.6%	19.3%
Large	4.7%	5.4%	39.3	43.6	6.1%	6.4%
Convertible	3.0%	3.0%	39.5	49.5	4.4%	4.8%
MPV	4.9%	5.4%	41.5	39.0	5.5%	5.5%
Estate	4.5%	4.1%	44.3	38.6	7.1%	6.8%
Grand Total	100%	100%	39.2	37.9	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	
	Jul 21	Jul 22	Jul 21	Jul 22	Jul 21	Jul 22
Under 6 mths	0.1%	0.1%	34.5	48.4	0.0%	0.0%
6 mths - 1 yr	0.5%	0.1%	33.7	41.4	0.2%	0.1%
1 - 2 yrs	5.0%	1.8%	32.7	37.1	2.2%	1.0%
10 - 12 yrs	12.6%	11.7%	29.9	32.3	5.8%	5.1%
12 - 14 yrs	17.8%	17.8%	30.5	33.5	9.5%	8.2%
14 - 16 yrs	21.1%	21.8%	33.8	34.3	11.9%	10.7%
16 - 18 yrs	5.5%	6.7%	46.9	43.8	5.1%	5.4%
18 - 20 yrs	10.1%	11.1%	52.2	43.9	12.3%	13.9%
2 - 3 yrs	12.3%	12.7%	48.9	44.6	16.7%	18.2%
3 - 4 yrs	8.3%	8.6%	60.8	47.5	12.7%	16.8%
4 - 5 yrs	4.2%	4.9%	52.2	45.9	8.1%	12.6%
5 - 6 yrs	1.5%	1.7%	52.6	46.1	2.9%	4.7%
6 - 8 yrs	0.4%	0.5%	54.0	53.1	0.9%	1.2%
8 - 10 yrs	0.1%	0.1%	80.0	57.3	0.2%	0.4%
Over 20 yrs	0.3%	0.4%	72.4	72.8	0.7%	1.2%
Grand Total	100%	100%	39.2	37.9	100%	100%





Electric/hybrid

July 2022

At a glance

- Ford Mustang Mach-E was the fastest selling electric vehicle in Jul 22, selling on average in around 14 days.
- Renault Arkana was the fastest selling hybrid vehicle in Jul 22, selling on average in 10 days.
- Petrol vehicles accounted for 52% of all listings in Jul 22 with alternative fuel vehicles accounting for 3.4%.

Electric, sold >10

Ford Mustang Mach-E was the fastest selling electric vehicle in Jul 22, selling on average in around 14 days.

Rank	Make	Model	Days to sell
1	Ford	Mustang Mach-E	13.9
2	MG	MG5	16.2
3	MINI	Hatch	17.3
4	Volkswagen	Golf	17.3
5	MG	ZS	17.7
6	Mercedes-Benz	EQA	18.4
7	Citroen	C4	18.6
8	Hyundai	Kona	19.1
9	Honda	E	19.6
10	Mazda	MX-30	19.7

Hybrid, sold >10

Renault Arkana was the fastest selling hybrid vehicle in Jul 22, selling on average in 10 days.

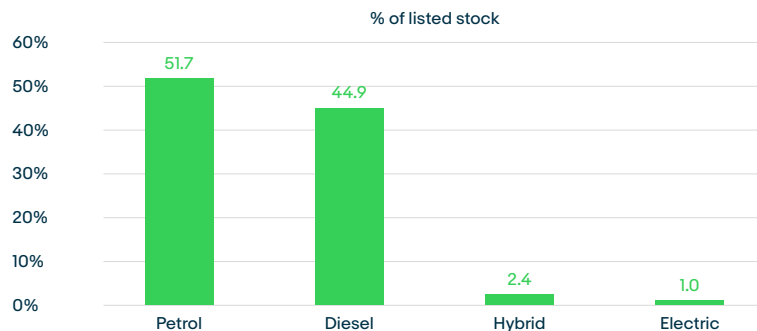
Rank	Make	Model	Days to sell
1	Renault	Arkana	10.2
2	Suzuki	Ignis	10.7
3	Ford	Fiesta	11.4
4	Land Rover	Discovery Sport	11.9
5	Cupra	Formentor	13.0
6	Toyota	Prius Plus	13.7
7	Mercedes-Benz	GLE	15.0
8	DS Automobiles	DS 4	17.8
9	Ford	Puma	18.4
10	BMW	7 Series	18.8

“ The cost of living crisis is still severely impacting households. It’s more important than ever for dealers to ensure they are presenting and pricing stock attractively and providing support and guidance for nervous buyers”

Lucy Tugby,
Head of Marketing, Motors

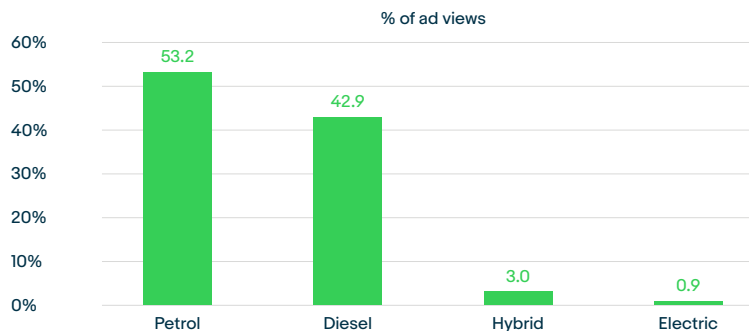
Vehicle listings by fuel type

Petrol vehicles accounted for 52% of all listings in Jul 22 with alternative fuel vehicles accounting for 3.4%.



Ad views by fuel type

Petrol vehicles accounted for 53% of all ad views in Jul 22 with alternative fuel vehicles accounting for 3.9%.



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Electric/hybrid

July 2022

At a glance

- 1-2 year, 10k-20k mile Nissan Leaf saw the biggest price change MoM with a +10.1% increase to £25,270.
- Older Lexus RX's took top spot for highest price increases for hybrid vehicles, increasing by +16.9% MoM to £15,011.
- 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

1-2 year, 10k-20k mile Nissan Leaf saw the biggest price change MoM with a +10.1% increase to £25,270.

Increase					
Make	Model	Age band	Mileage	Avg price	% change
Nissan	Leaf	1 - 2 yrs	10 - 20k	£25,270	10.1%
Mercedes-Benz	EQC	2 - 3 yrs	10 - 20k	£69,343	7.8%
Nissan	Leaf	3 - 4 yrs	20 - 30k	£24,928	7.5%
Renault	Zoe	3 - 4 yrs	20 - 30k	£22,423	5.1%
Peugeot	208	2 - 3 yrs	10 - 20k	£29,819	4.5%

Decrease					
Make	Model	Age band	Mileage	Avg price	% change
Tesla	Model X	2 - 3 yrs	20 - 30k	£73,308	-4.0%
Hyundai	Ioniq	3 - 4 yrs	20 - 30k	£28,629	-5.0%
Tesla	Model 3	3 - 4 yrs	30 - 40k	£46,551	-5.4%
Audi	E-Tron	2 - 3 yrs	10 - 20k	£61,687	-5.5%
Jaguar	I-Pace	4 - 5 yrs	40k - 50k	£45,458	-5.9%

Top 5 price movers - Hybrid

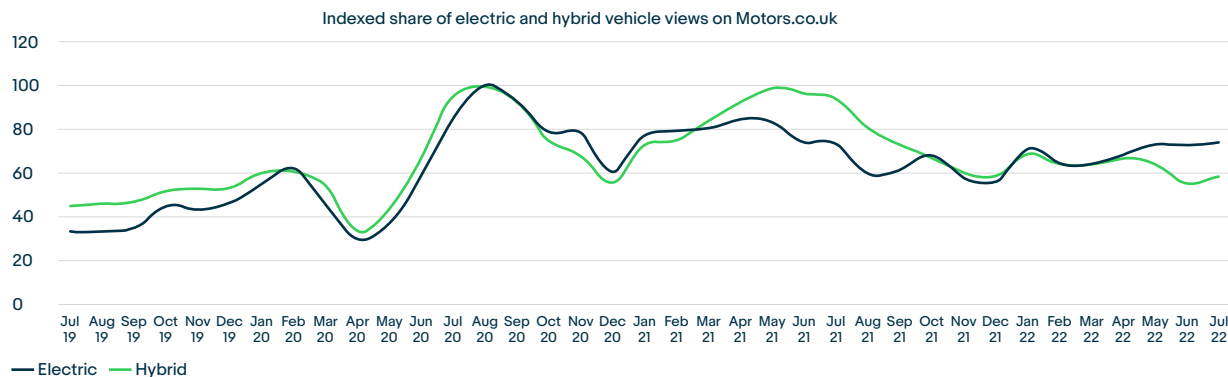
Older Lexus RX's took top spot for highest price increases for hybrid vehicles, increasing by +16.9% MoM to £15,011.

Increase					
Make	Model	Age band	Mileage	Avg price	% change
Lexus	RX	10 - 12 yrs	80 - 100k	£15,011	16.9%
BMW	3 Series	8 - 10 yrs	60 - 80k	£18,790	12.0%
Toyota	Auris	3 - 4 yrs	10 - 20k	£16,629	6.9%
Volvo	XC60	3 - 4 yrs	20 - 30k	£49,652	6.1%
Volvo	XC60	2 - 3 yrs	20 - 30k	£46,316	5.3%

Decrease					
Make	Model	Age band	Mileage	Avg price	% change
Toyota	Estima	8 - 10 yrs	60 - 80k	£12,796	-8.4%
BMW	3 Series	3 - 4 yrs	20 - 30k	£27,895	-9.0%
Honda	Jazz	4 - 5 yrs	20 - 30k	£20,284	-9.1%
Toyota	Auris	6 - 8 yrs	50 - 60k	£10,820	-13.4%
Mercedes-Benz	C Class	6 - 8 yrs	60 - 80k	£18,313	-14.1%

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.



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

About us

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.



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