

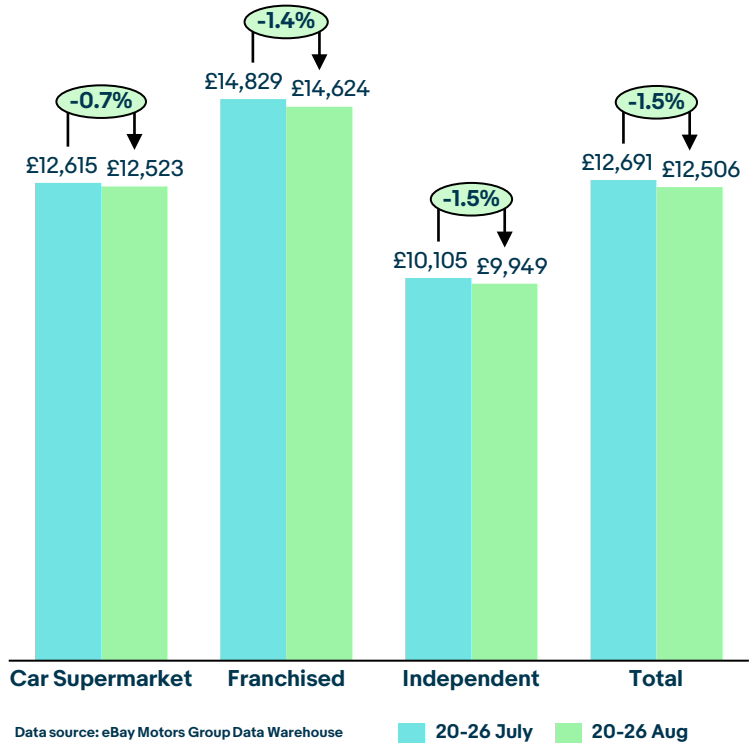


Welcome to the eBay Motors Group Market View. Every month we analyse the consumer response to more than 700,000 used vehicles across the eBay Motors Group, identifying key trends by vehicle segment, fuel type and dealership.

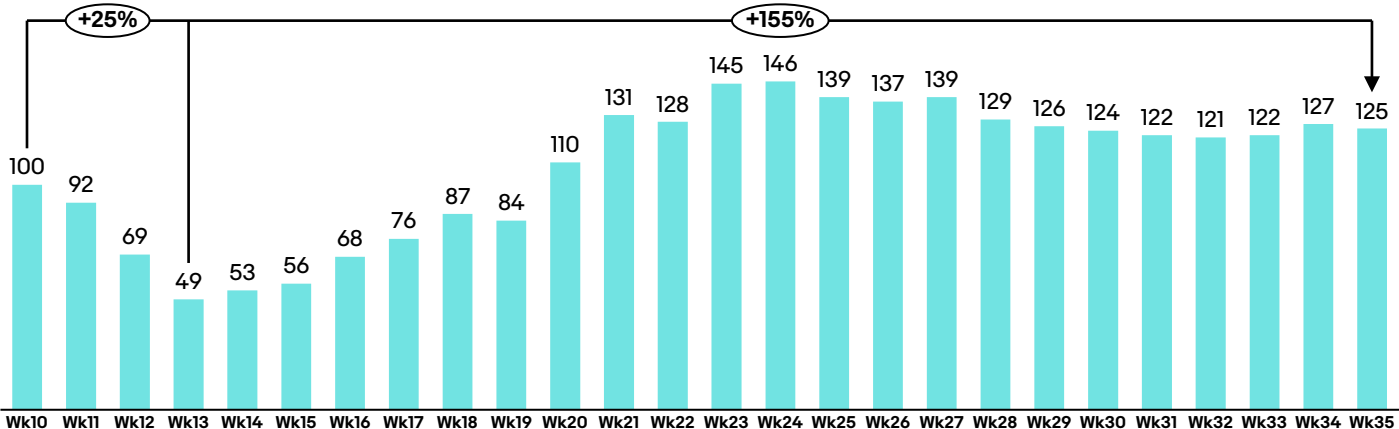
At a glance

- Average vehicle list price declined slightly in August with an average price drop of -1.5% across the top 50 make/models
- Independent and Franchised dealers saw a similar drop in average list price of -1.5%, with Supermarkets down just -0.7% compared to July 2020
- Call and email lead volumes continued at strong post-lockdown levels (+155% from lowest activity in lockdown period), with a largely stable amount of activity in recent weeks
- Searches for "cars for sale" and "used cars" remained strong over August, reflecting consistent consumer interest as restrictions are lifted.

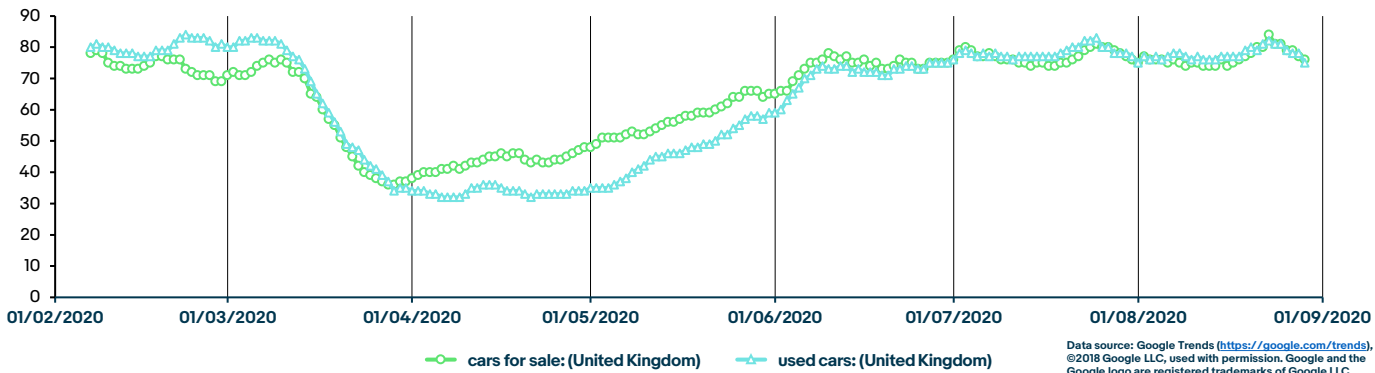
Avg Listing Price of Top 50 leading make/models on Motors.co.uk
£Avg, 20-26 July vs. 20-26 August 2020



Total eBay Motors Group leads by week
Indexed Volume of Leads
Week 10 (w/c 2nd March) to Week 35 (w/c 24th Aug), 2020



**“Used Cars” & “Cars for Sale”, Search interest over time
7 Day Rolling Average, 1st Feb to 29th August 2020, Google Trends**



At a glance

- Dealer inventory levels down 27% YoY in August 2020, as supply struggles to keep pace with demand.
- Fall largely driven by car supermarkets stocking -43% fewer cars YoY
- On average franchised dealers saw a reduction in their stock levels of -10 vehicles (-17%), with independent dealers seeing a more modest fall of -5 (-10%)
- Days in stock is currently considerably up YoY, due to very low vehicle sales during COVID-19 shutdown. The situation continues to improve as bottled up demand is released.



Stock volume per dealership

46.5

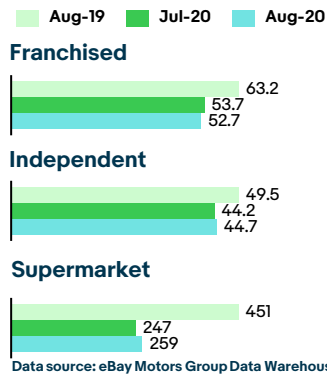
Jul 20 – 46.7
Aug 19 – 63.7

Average days in stock

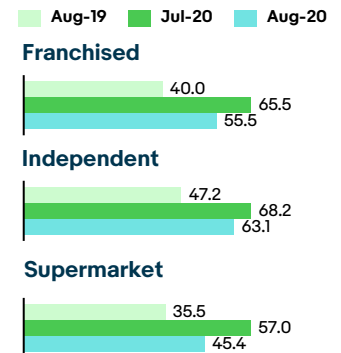
57.8

Jul 20 – 65.6
Aug 19 – 40.4

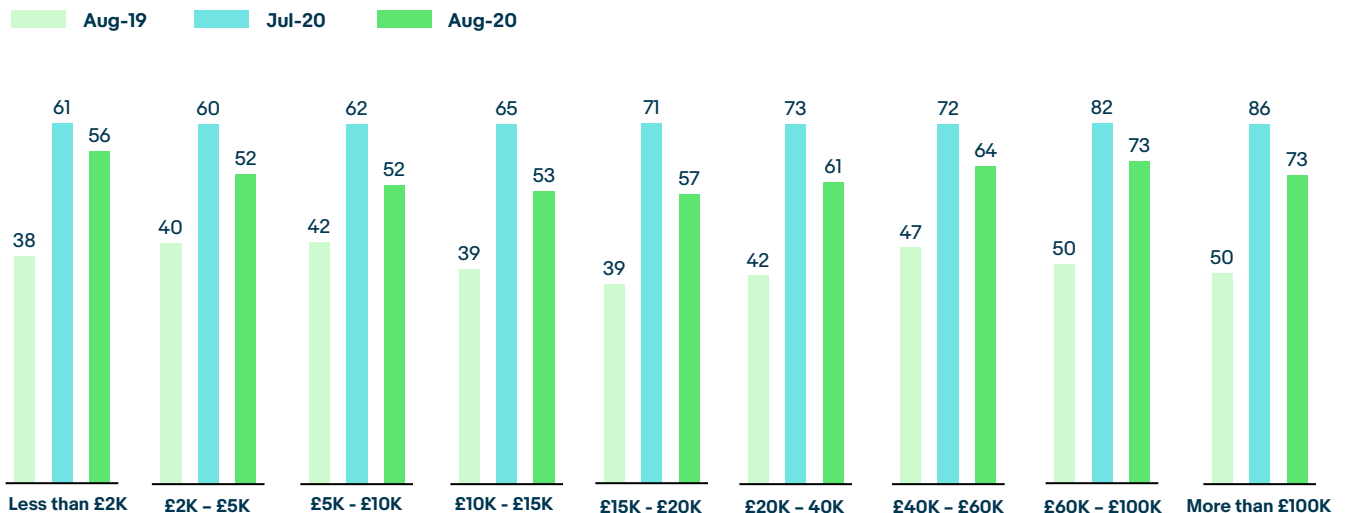
Stock volume by dealer type



Average days in stock by dealer type



Average days in stock by price segment



Stock volume, vehicle views and average days in stock by fuel type

	Aug 19	Aug 20
Diesel		
Stock volume	44.2%	44.2%
Vehicle views	45.0%	44.6%
Days in stock	41.5	54.0
Petrol		
Stock volume	54.3%	52.4%
Vehicle views	53.1%	53.3%
Days in stock	40.0	53.4
Hybrid		
Stock volume	1.3%	2.7%
Vehicle views	1.4%	1.4%
Days in stock	42.9	78.8
Electric		
Stock volume	0.2%	0.7%
Vehicle views	0.5%	0.7%
Days in stock	45.1	65.2

Data source: eBay Motors Group Data Warehouse

Top 10 fastest selling makes and models

(Aug 2020 - minimum 100 vehicles)

Make	Model	Average days in stock
Mercedes-Benz	SLC Class	33.7
Vauxhall	Astra GTC	34.1
Audi	S3	35.0
Volkswagen	Scirocco	35.4
Renault	Kadjar	36.2
DS Automobiles	DS4	36.8
Mazda	MX-5	36.8
Audi	S5	38.0
Mini	Convertible	38.0
Audi	A1	38.4



At a glance

- Stock volume by fuel type sees stability for Diesel models, with a fall in share for Petrol and increases for alternative fuels.
- Petrol vehicles outperform diesel stock in terms of relative share of views, suggesting consumer intent may be continuing to drift away from Diesels.
- Petrol was the fastest selling of all fuel types in August averaging 53.4 days in stock.
- Mercedes-Benz SLC Class was the fastest selling volume car during August 2020, selling on average in 33.7 days
- Medium and Lower medium were the fastest selling sectors averaging 57 & 60 days in stock.
- London was the fastest selling region, averaging 45 days in stock, with Scotland, South Central & South East England all averaging 51 days.

Average days in stock by sector

Region	Aug 19	Aug 20	YOY rank change
4x4	38	61	+1 ●
Convertible	43	68	+1 ●
Coupe	43	66	+1 ●
Estate	41	63	0 ●
Large	49	82	0 ●
Lower Medium	38	57	0 ●
Medium	40	60	-3 ●
MPV	39	65	+5 ●
Prestige	39	62	0 ●
Small	44	63	-4 ●
Supermini	41	63	-2 ●
Upper Medium	44	69	+1 ●

Data source: eBay Motors Group Data Warehouse

Average days in stock by region

Region	Aug 19	Aug 20	YOY rank change
East Anglia	43	55	-2 ●
London	30	45	0 ●
Midlands	42	53	-1 ●
North East England	45	54	+1 ●
North West England	39	52	-1 ●
Northern Ireland	48	75	0 ●
Scotland	32	51	-1 ●
South Central England	44	51	+3 ●
South East England	38	51	+1 ●
South West England	47	59	+1 ●
Wales	45	69	-1 ●

For more information please contact your account manager or email support@ebaymotorsgroup.co.uk

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