

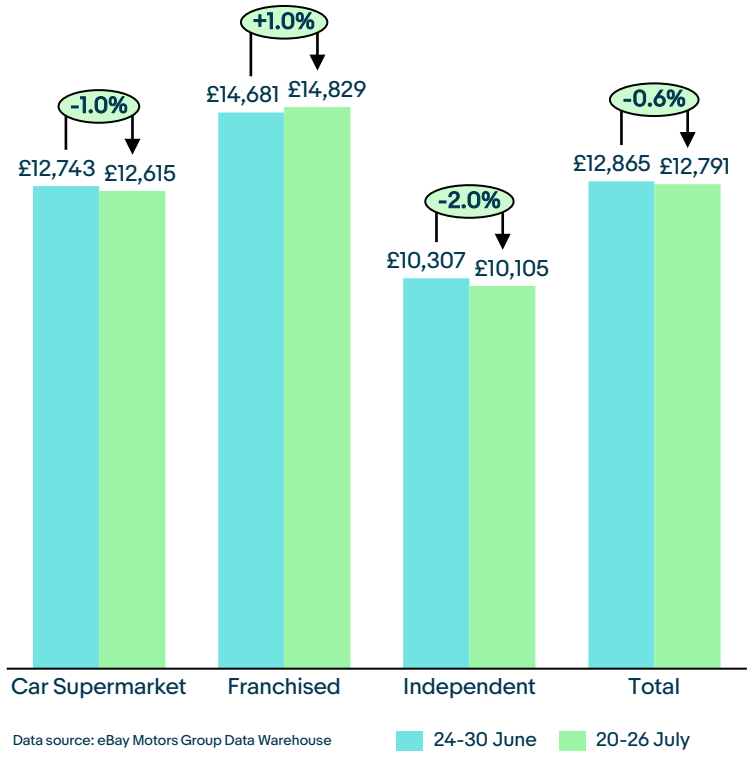


Welcome to the eBay Motors Group Market View. Every month we analyse the consumer response to more than 700,000 used vehicles across the eBay Motors Group, identifying key trends by vehicle segment, fuel type and dealership.

At a glance

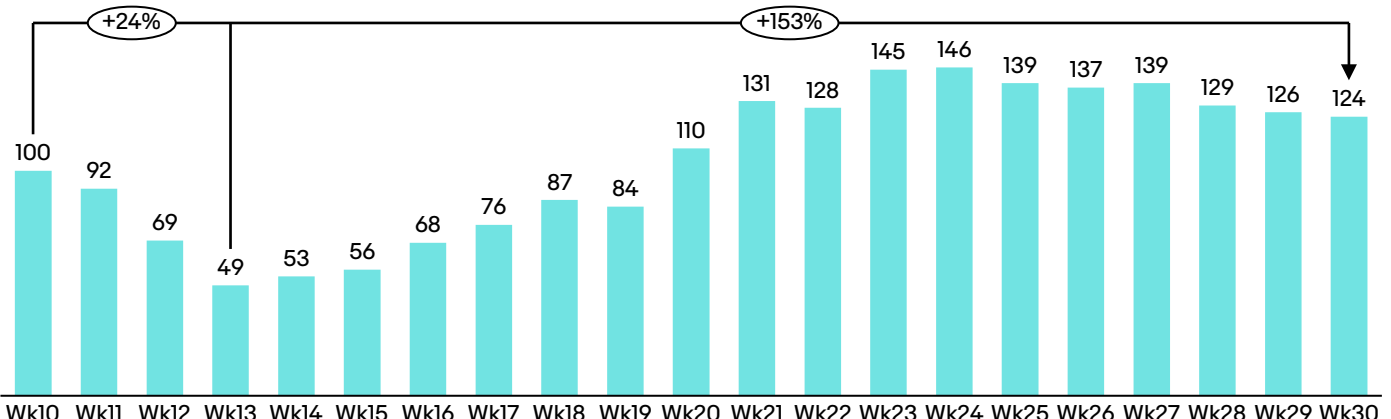
- Average vehicle list price has remained largely stable throughout July with average price drop of -0.6% across the top 50 make/models
- Only Franchised dealers have seen a small uptick in average vehicle listing price, potentially due to a lack of supply in the sector and increased buyer demand
- Call and email lead volumes continued at strong post-lockdown levels (+153% from lowest activity in lockdown period), with minor WoW drops in line with usual seasonal trends
- Searches for "cars for sale" and "used cars" remained strong over July, reflecting consistent consumer interest

Avg Listing Price of Top 50 leading make/models on Motors.co.uk
 £Avg, 24-30 June vs. 20-26 July 2020

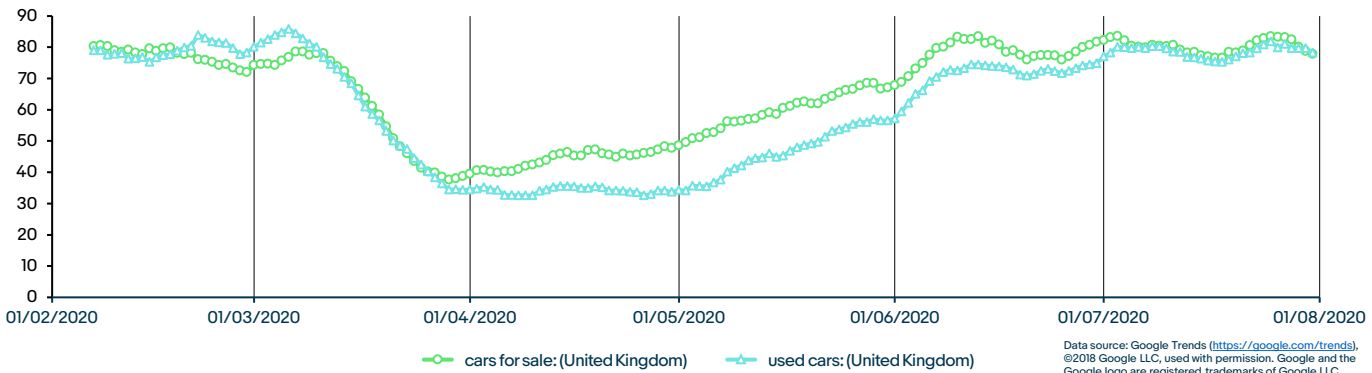


Total eBay Motors Group leads by week

Indexed Volume of Leads
 Week 10 (w/c 2nd March) to Week 30 (w/c 20th July), 2020



"Used Cars" & "Cars for Sale", Search interest over time
7 Day Rolling Average, 1st Feb to 31st July 2020, Google Trends



At a glance

- Dealer inventory levels were down 30% YoY in July 2020, as supply struggles to keep pace with demand.
- Fall largely driven by car supermarkets stocking -52% fewer cars YoY
- On average franchised dealers saw a reduction in their stock levels of -13 vehicles (-19%), with independent dealers seeing a more modest fall of -5 (-11%)
- 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

46.7

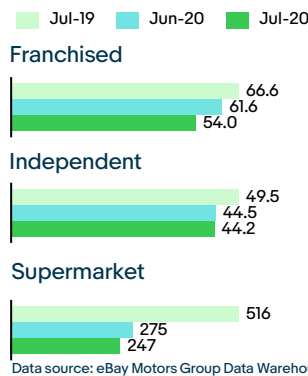
Jun 20 - 51.0
Jul 19 - 66.3

Average days in stock

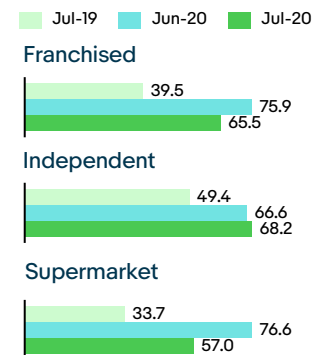
65.6

Jun 20 - 72.7
Jul 19 - 40.9

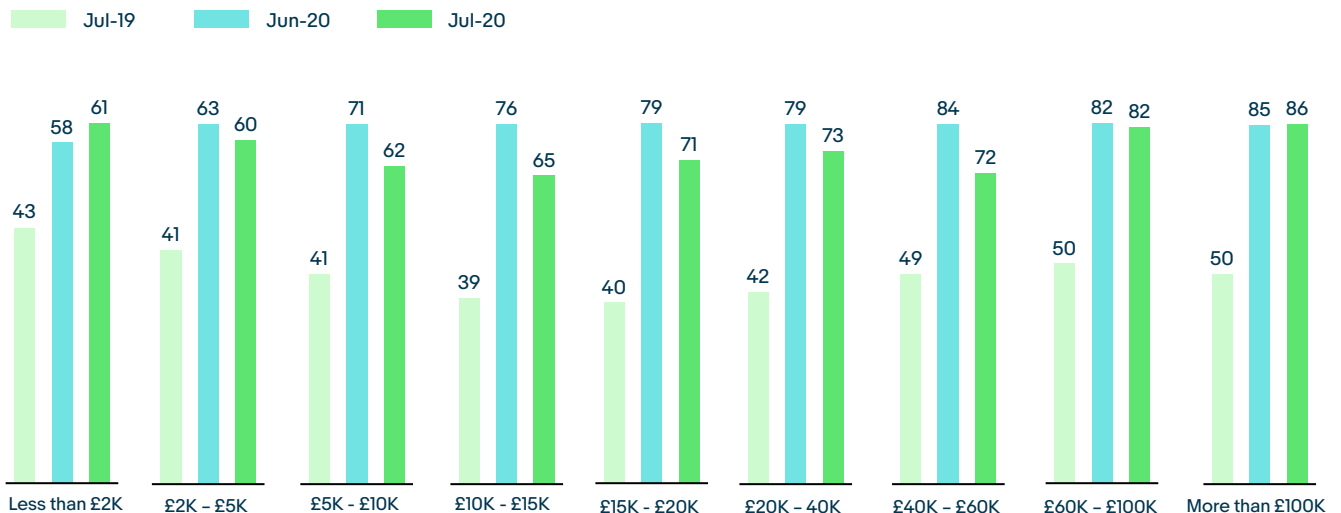
Stock volume by dealer type



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

	Jul 19	Jul 20
Diesel		
Stock volume	46.2%	44.6%
Vehicle views	45.4%	44.1%
Days in stock	41.9	65.4
Petrol		
Stock volume	52.1%	52.4%
Vehicle views	52.7%	53.8%
Days in stock	40.0	64.8
Hybrid		
Stock volume	1.4%	2.4%
Vehicle views	1.4%	1.5%
Days in stock	43.8	84.7
Electric		
Stock volume	0.3%	0.7%
Vehicle views	0.5%	0.6%
Days in stock	42.5	74.3

Data source: eBay Motors Group Data Warehouse

Top 10 fastest selling makes and models

(Jul 20 - minimum 100 vehicles)

Make	Model	Average days in stock
Vauxhall	Astra GTC	40.4
Audi	S3	40.5
Mercedes-Benz	SLC Class	41.0
Mazda	MX-5	43.1
DS Automobiles	DS4	44.6
Volkswagen	Scirocco	45.6
Mercedes-Benz	GLA Class	46.5
DS Automobiles	DS3	46.8
Dacia	Duster	48.2
MINI	Paceman	48.5



At a glance

- Stock volume by fuel type sees stability for petrol models but a fall in share for Diesels 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 July averaging 64.8 days in stock.
- Vauxhall Astra GTC was the fastest selling volume car during July 2020, selling on average in 40.4 days
- Lower Medium and Supermini were the fastest selling sectors averaging 64 & 68 days in stock.
- London and South East England were the fastest selling regions averaging 54 & 60 days in stock.

Average days in stock by sector

Region	Jul 19	Jul 20	YOY rank change
4x4	40	70	0 ●
Convertible	45	76	-1 ●
Coupe	43	71	-3 ●
Estate	40	71	+3 ●
Large	51	93	0 ●
Lower Medium	38	64	0 ●
Medium	38	68	0 ●
MPV	40	74	+4 ●
Prestige	43	71	+1 ●
Small	44	71	-4 ●
Supermini	42	70	-2 ●
Upper Medium	44	77	+2 ●

Data source: eBay Motors Group Data Warehouse

Average days in stock by region

Region	Jul 19	Jul 20	YOY rank change
East Anglia	45	64	0 ●
London	28	54	0 ●
Midlands	40	62	0 ●
North East England	47	64	-3 ●
North West England	43	62	0 ●
Northern Ireland	45	91	+3 ●
Scotland	33	64	+6 ●
South Central England	45	61	-4 ●
South East England	37	60	-1 ●
South West England	49	69	-2 ●
Wales	46	82	+1 ●

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

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