



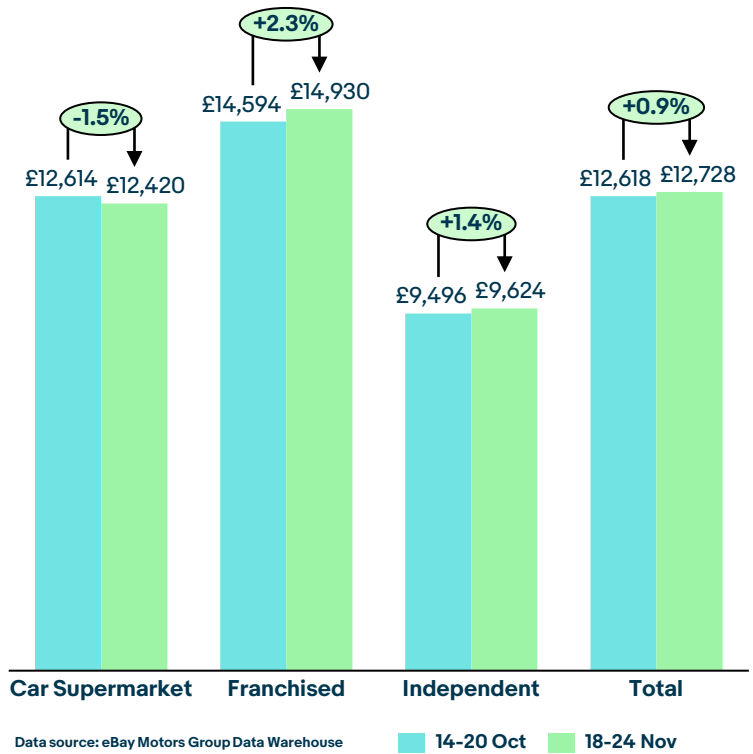
Welcome to the eBay Motors Group Market View. Every month we analyse the consumer response to more than 600,000 used vehicles across the eBay Motors Group, identifying key trends by vehicle segment, fuel type and dealership.

At a glance

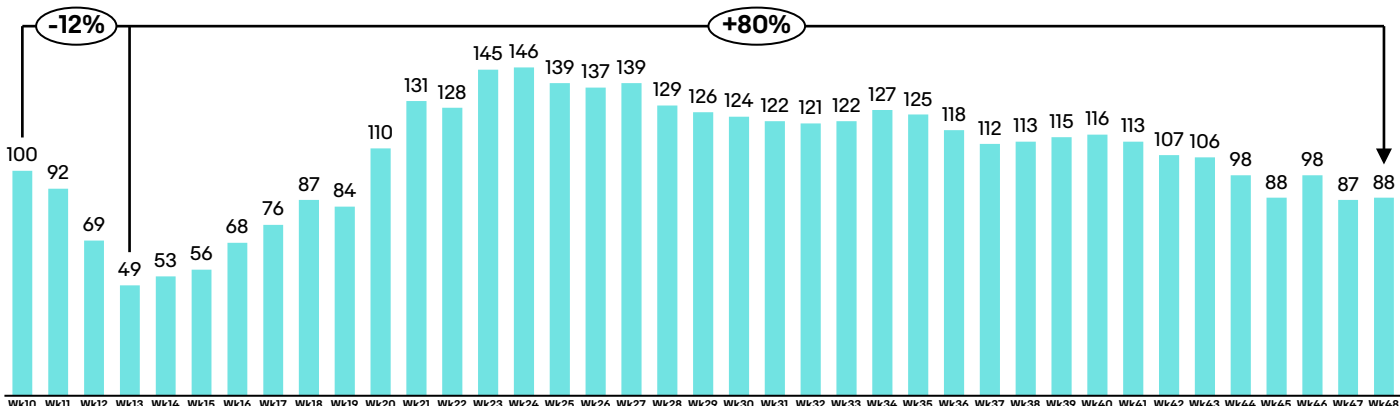
- Average vehicle list price of the top 50 make/models increased by just under +1% MoM
- Franchised dealers saw the biggest increase in average price, up +2.3%, with Supermarkets down by -1.5%
- Consumer demand has dropped in recent weeks due to ongoing Covid-19 restrictions and seasonality. However, activity has remained much higher than lockdown #1, with Wk48 up 80% on Wk13



Avg Listing Price of Top 50 leading make/models on Motors.co.uk
£Avg, 14-20 Oct vs. 18-24 Nov 2020

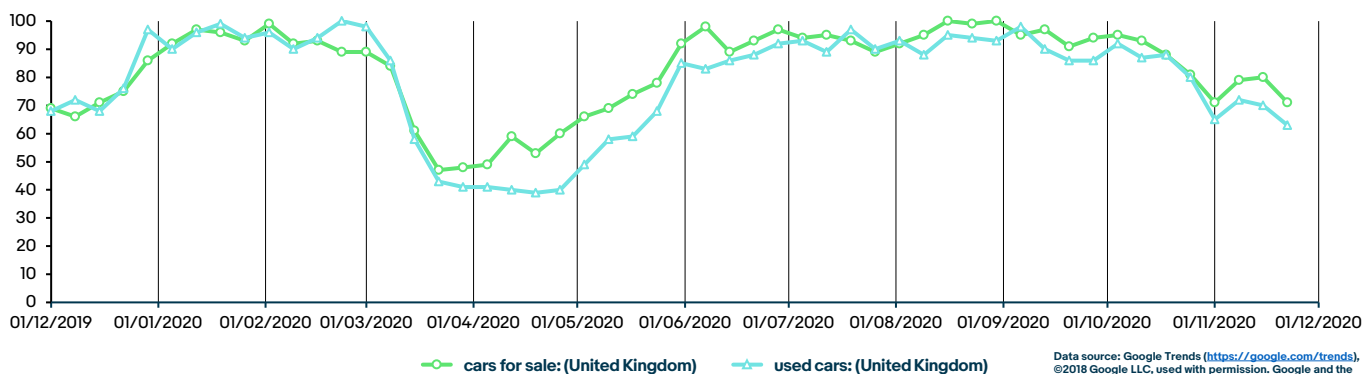


Total eBay Motors Group leads by week
Indexed Volume of Leads
Week 10 (w/c 2nd March) to Week 48 (w/c 23rd Nov), 2020



Searches for "cars for sale" and "used cars" showed initial decline in response to the second national lockdown, but then recovered slightly before declining again in the last week. Again, consumer search demand is much higher than during the first National lockdown.

"Used Cars" & "Cars for Sale", Search interest over time Weekly, w/c 1st Dec 2019 to 22nd Nov 2020, Google Trends



At a glance

- Whilst dealer inventory levels were down -13% YoY, stocking levels continue to recover, with average listing up +6% MoM indicating increased stock availability in market
- All dealer types saw MoM growth, however Independent stock volumes continue to be significantly down YoY (-19%)
- Franchised stock levels were down just -1%, whereas Supermarket was up +5% YoY
- Average time to sell showed considerable improvement YoY, with Nov-20 figures (all vehicles) of 36.3 days. Improvements were seen YoY across all dealer types and price segments. Franchised dealers saw a small increase in days in stock MoM of +6%, with Independents falling by -5%

Stock volume per dealership

53.2

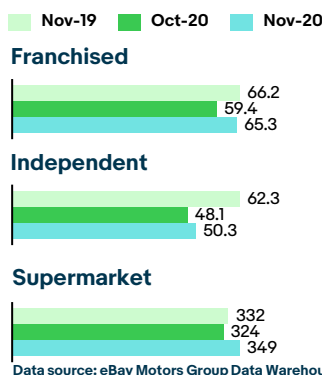
Oct 20 - 50.3
Nov 19 - 61.3

Average days to sell

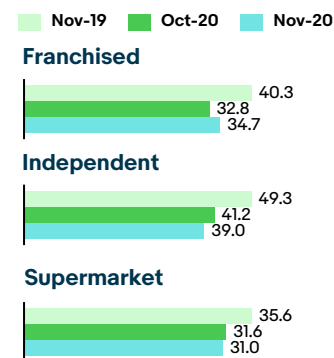
36.3

Oct 20 - 36.0
Nov 19 - 42.4

Stock volume by dealer type



Average days to sell by dealer type



Average days to sell by price segment



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

| | Nov 19 | Nov 20 |
|-------------------|--------|--------|
| Diesel | | |
| Stock volume | 45.9% | 42.9% |
| Vehicle views | 45.6% | 43.9% |
| Avg. days to sell | 43.0 | 35.1 |
| Petrol | | |
| Stock volume | 52.0% | 54.1% |
| Vehicle views | 52.3% | 53.3% |
| Avg. days to sell | 41.9 | 35.6 |
| Hybrid | | |
| Stock volume | 1.7% | 2.2% |
| Vehicle views | 1.6% | 1.9% |
| Avg. days to sell | 44.9 | 43.9 |
| Electric | | |
| Stock volume | 0.4% | 0.8% |
| Vehicle views | 0.6% | 0.9% |
| Avg. days to sell | 45.3 | 46.1 |

Data source: eBay Motors Group Data Warehouse



Top 10 fastest days to sell makes and models

(Nov 2020 - minimum 100 vehicles)

| Make | Model | Average days to sell |
|---------------|------------|----------------------|
| Ford | Puma | 24.9 |
| Mercedes-Benz | GLA Class | 25.0 |
| Mercedes-Benz | A Class | 27.2 |
| Ford | Galaxy | 27.3 |
| Mercedes-Benz | CLA | 27.4 |
| Audi | Q5 | 27.8 |
| Volvo | XC40 | 27.8 |
| Mercedes-Benz | GLE | 28.2 |
| Land Rover | Freelander | 28.4 |
| BMW | X5 | 28.9 |

At a glance

- Stock volume by fuel type saw Diesel vehicles down as a share of total stock YoY, replaced by other fuel types - but particularly Petrol models.
- Petrol vehicles outperformed diesel stock in terms of relative share of views, as consumer intent continues to drift away from Diesels.
- There was little difference in the speed to sale of Petrol and Diesel vehicles in November, both around 35 days
- Ford Puma and Mercedes-Benz GLA Class were the fastest selling volume cars during Nov-20, selling on average in 25 days.
- Medium, Lower Medium & 4x4 were the fastest selling vehicle types, selling in 32-35 days
- Average days in stock decreased across all regions YoY but with little change in overall rank from Oct-20.

Average days to sell by sector

| Sector | Nov 19 | Nov 20 | YOY rank change |
|--------------|--------|--------|-----------------|
| Lower Medium | 40 | 35 | +1 ● |
| 4x4 | 42 | 32 | -1 ● |
| Medium | 43 | 35 | +1 ● |
| Prestige | 44 | 36 | -1 ● |
| Coupe | 49 | 38 | -3 ● |
| Estate | 45 | 38 | +2 ● |
| Supermini | 44 | 37 | +1 ● |
| MPV | 45 | 40 | +4 ● |
| Small | 46 | 42 | +3 ● |
| Convertible | 50 | 38 | -5 ● |
| Upper Medium | 48 | 38 | +1 ● |
| Large | 55 | 46 | 0 ● |

Average days to sell by region

| Region | Nov 19 | Nov 20 | YOY rank change |
|-----------------------|--------|--------|-----------------|
| London | 29 | 29 | +1 ● |
| South East England | 40 | 37 | +1 ● |
| North West England | 41 | 35 | -1 ● |
| Scotland | 35 | 27 | -1 ● |
| South Central England | 44 | 38 | +1 ● |
| Midlands | 41 | 38 | +1 ● |
| North East England | 46 | 39 | +1 ● |
| East Anglia | 46 | 38 | -3 ● |
| South West England | 48 | 43 | +1 ● |
| Wales | 53 | 49 | 0 ● |
| Northern Ireland | 49 | 39 | -1 ● |