

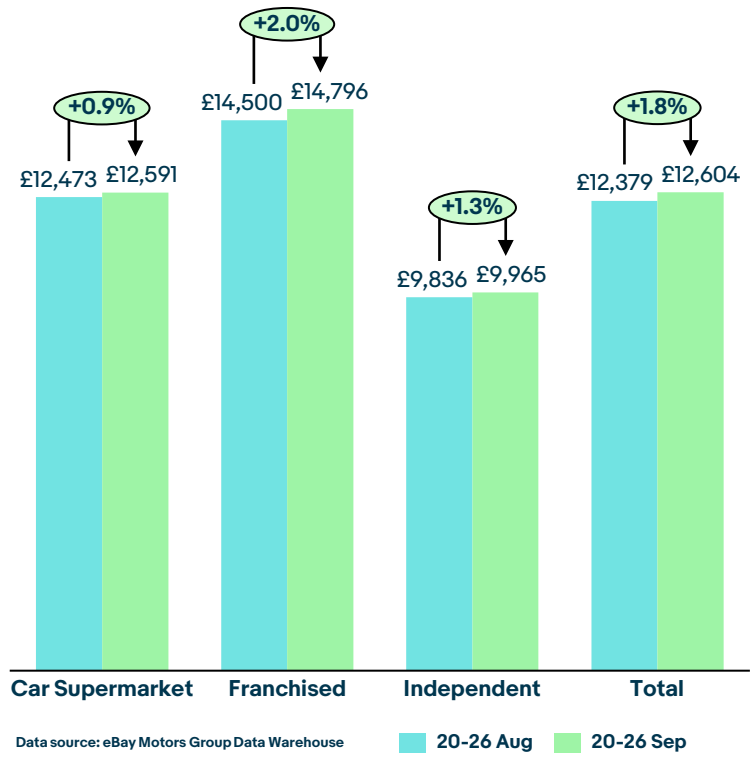


Welcome to the eBay Motors Group Market View. Every month we analyse the consumer response to more than 700,000 used vehicles across the eBay Motors Group, identifying key trends by vehicle segment, fuel type and dealership.

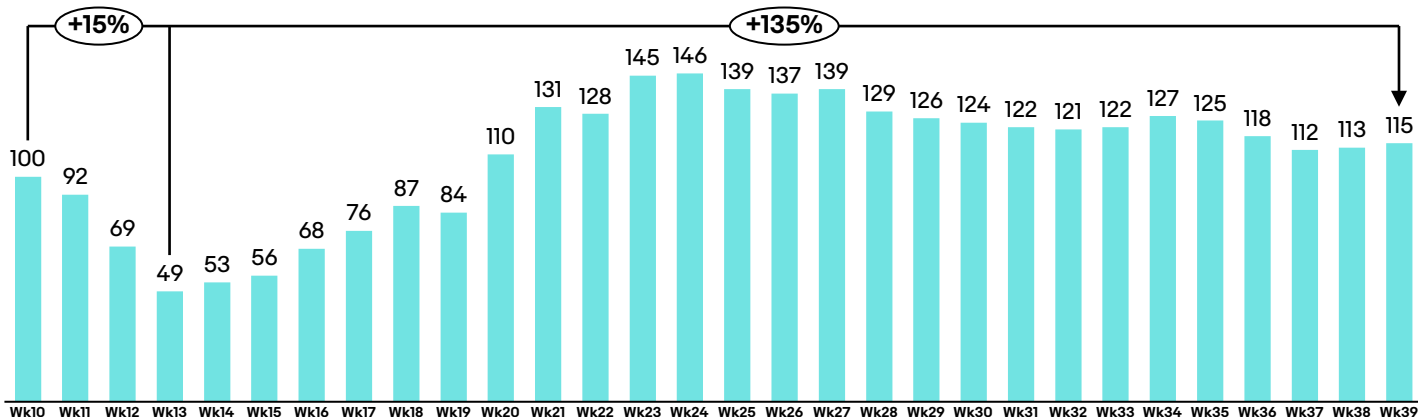
At a glance

- Average vehicle list price of the top 50 make/models increased MoM in September by +1.8%
- Franchised dealers saw the biggest shift with an average increase of +2.0% with both Independent dealerships and Supermarkets up nearer +1.0% MoM
- Call and email lead volumes continued the strong post-lockdown trend, with only some slight softening in September but still +15% higher than Wk10 (w/c 2nd March)
- Searches for "cars for sale" and "used cars" remained strong over September, reflecting consistent consumer interest despite the ongoing challenges presented by COVID-19

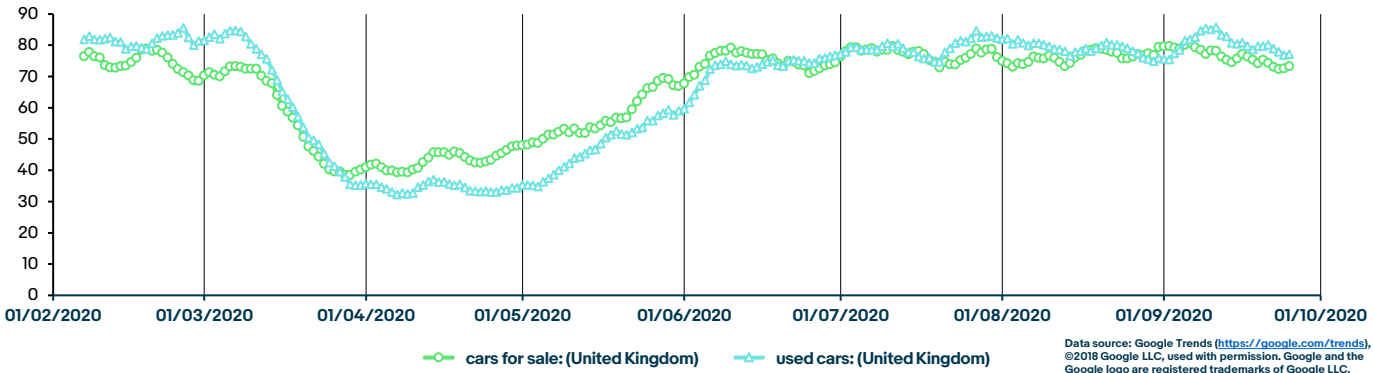
Avg Listing Price of Top 50 leading make/models on Motors.co.uk
£Avg, 20-26 Aug vs. 20-26 Sep 2020



Total eBay Motors Group leads by week
Indexed Volume of Leads
Week 10 (w/c 2nd March) to Week 39 (w/c 21st Sep), 2020



**“Used Cars” & “Cars for Sale”, Search interest over time
7 Day Rolling Average, 1st Feb to 25th September 2020, Google Trends**



At a glance

- Dealer inventory levels were down 20% YoY in September 2020, as supply struggles to keep pace with demand. MoM stocking levels were stable.
- Fall largely driven by car supermarkets stocking -43% fewer cars YoY
- On average both Franchised and Independent dealers stocked an average of -9 fewer vehicles YoY in Sept-20.
- Average days in Stock continues to normalize following the COVID-19 lockdown period, with average Days in Stock in Sept-20 (all vehicles) of 47.2 days



Stock volume per dealership

46.4

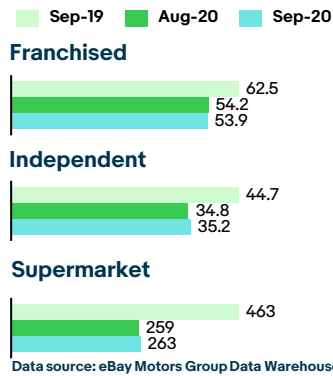
Aug 20 - 46.5
Sep 19 - 58.3

Average days in stock

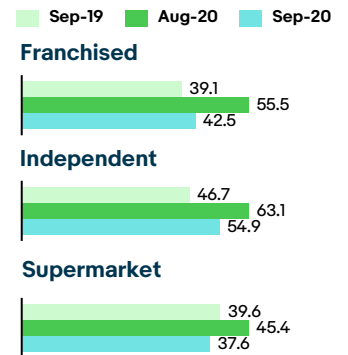
47.2

Aug 20 - 57.8
Sep 19 - 41.5

Stock volume by dealer type



Average days in stock by dealer type



Average days in stock by price segment

Sep-19 Aug-20 Sep-20



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

	Sep 19	Sep 20
Diesel		
Stock volume	46.6%	44.1%
Vehicle views	46.0%	43.8%
Days in stock	42.8	46.3
Petrol		
Stock volume	51.4%	53.4%
Vehicle views	52.0%	53.9%
Days in stock	40.1	46.6
Hybrid		
Stock volume	1.6%	1.9%
Vehicle views	1.5%	1.5%
Days in stock	44.8	71.2
Electric		
Stock volume	0.4%	0.7%
Vehicle views	0.5%	0.7%
Days in stock	47.6	59.8

Data source: eBay Motors Group Data Warehouse

Top 10 fastest selling makes and models

(Sep 2020 - minimum 100 vehicles)

Make	Model	Average days in stock
Audi	S3	31.5
Audi	S5	31.7
Mercedes-Benz	A Class	31.8
Skoda	Karoq	32.2
Audi	A1	32.2
Mercedes-Benz	GLA Class	32.3
Renault	Kadjar	32.6
SEAT	Ateca	33.5
Mazda	MX-5	33.7
Dacia	Sandero Stepway	34.3



At a glance

- Stock volume by fuel type sees Diesel vehicles down as a share of total stock YoY, replaced by other fuel types but particularly Petrol models.
- Petrol vehicles outperform diesel stock in terms of relative share of views, suggesting consumer intent is continuing to drift away from Diesels.
- There was little difference in the speed to sale of Petrol and Diesel vehicles in September, both around 46 days
- Audi S3 and Audi S5 were the fastest selling volume cars during September 2020, selling on average in 31.5 & 31.7 days respectively
- Medium, Lower Medium & 4x4 were the fastest selling vehicle types, selling in 45 days or less
- London was the fastest selling region, averaging 36 days in stock, with many other regions averaging around 44-46 days in stock.

Average days in stock by sector

Region	Sep 19	Sep 20	YOY rank change
Lower Medium	36	43	0 ●
4x4	41	43	-3 ●
Medium	39	45	+1 ●
Prestige	42	46	-5 ●
Coupe	43	47	-5 ●
Estate	41	47	-2 ●
Supermini	41	48	+1 ●
MPV	41	49	+5 ●
Small	41	49	+2 ●
Convertible	41	50	+6 ●
Upper Medium	43	54	0 ●
Large	51	64	0 ●

Average days in stock by region

Region	Sep 19	Sep 20	YOY rank change
London	31	36	0 ●
South East England	39	44	-2 ●
North West England	43	44	-3 ●
Scotland	31	45	+2 ●
South Central England	43	45	-2 ●
Midlands	42	46	+1 ●
North East England	46	46	-3 ●
East Anglia	45	49	0 ●
South West England	46	51	0 ●
Wales	52	56	-2 ●
Northern Ireland	47	70	+1 ●

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

Data source: eBay Motors Group Data Warehouse

ebaymotorsgroup.co.uk

Gumtree.com Limited, registered in England and Wales with number 03934849, 1 More London Place, London, SE1 2AF, UK.
© Copyright 2000-2020 Gumtree.com Limited. All rights reserved.

ebay
motors
group