

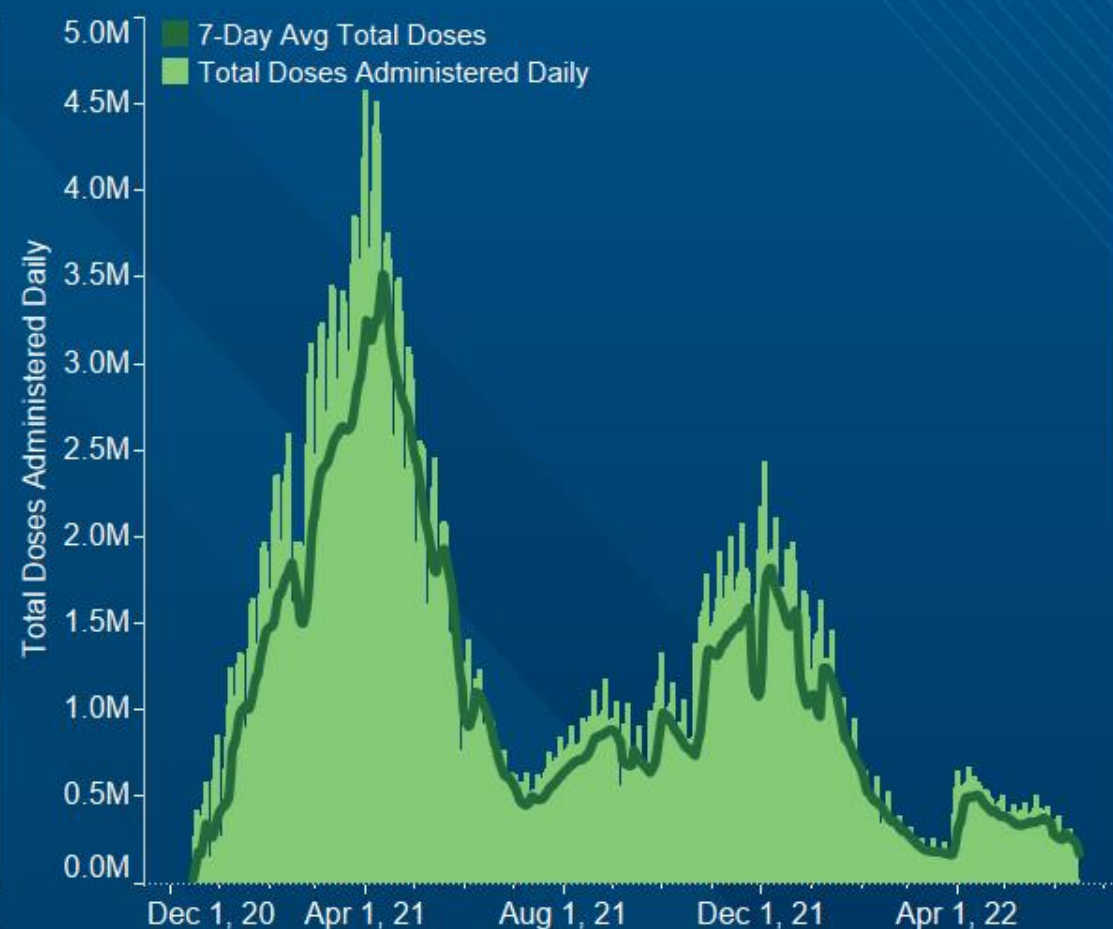
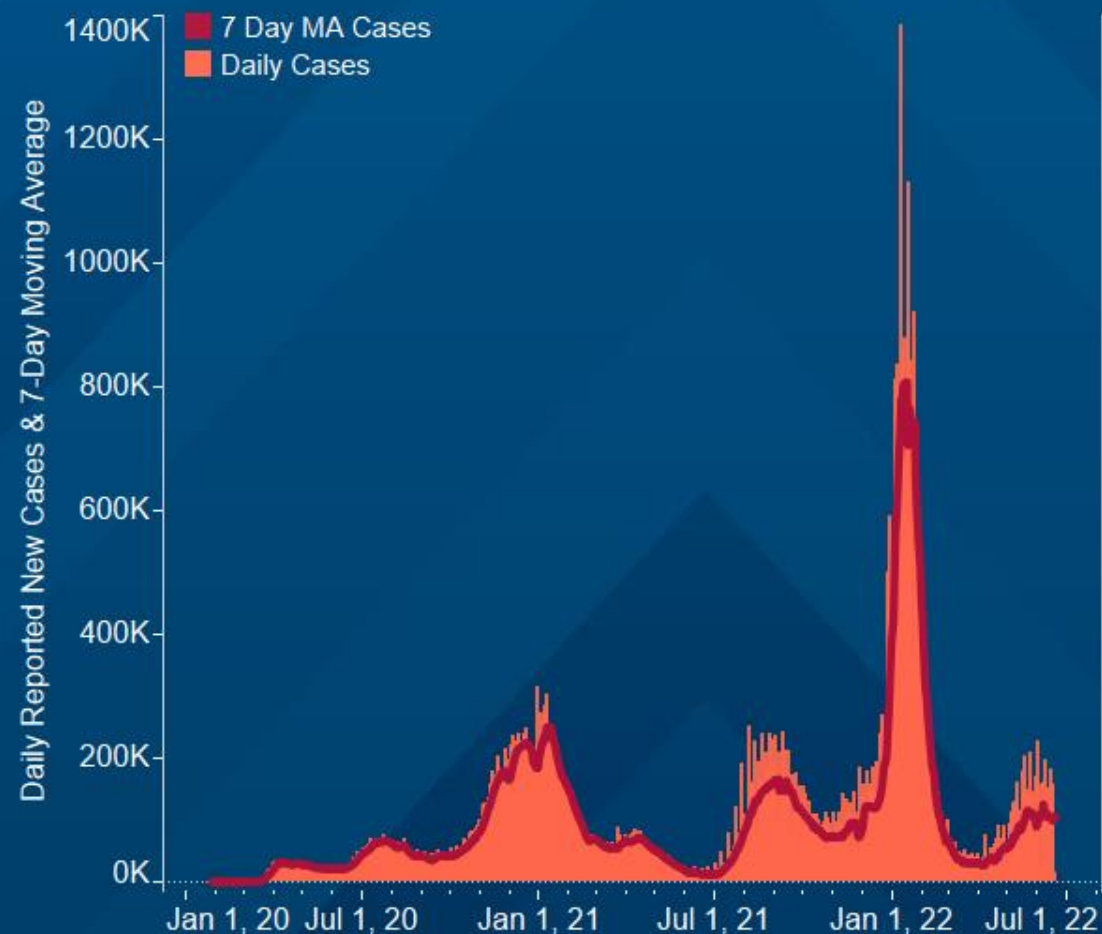
June 21, 2022

COX AUTOMOTIVE AUTO MARKET REPORT

Translating Data and Trends into Actionable Insights

THE WAY
FORWARD

COVID-19 DAILY CASE AND VACCINATION TRENDS

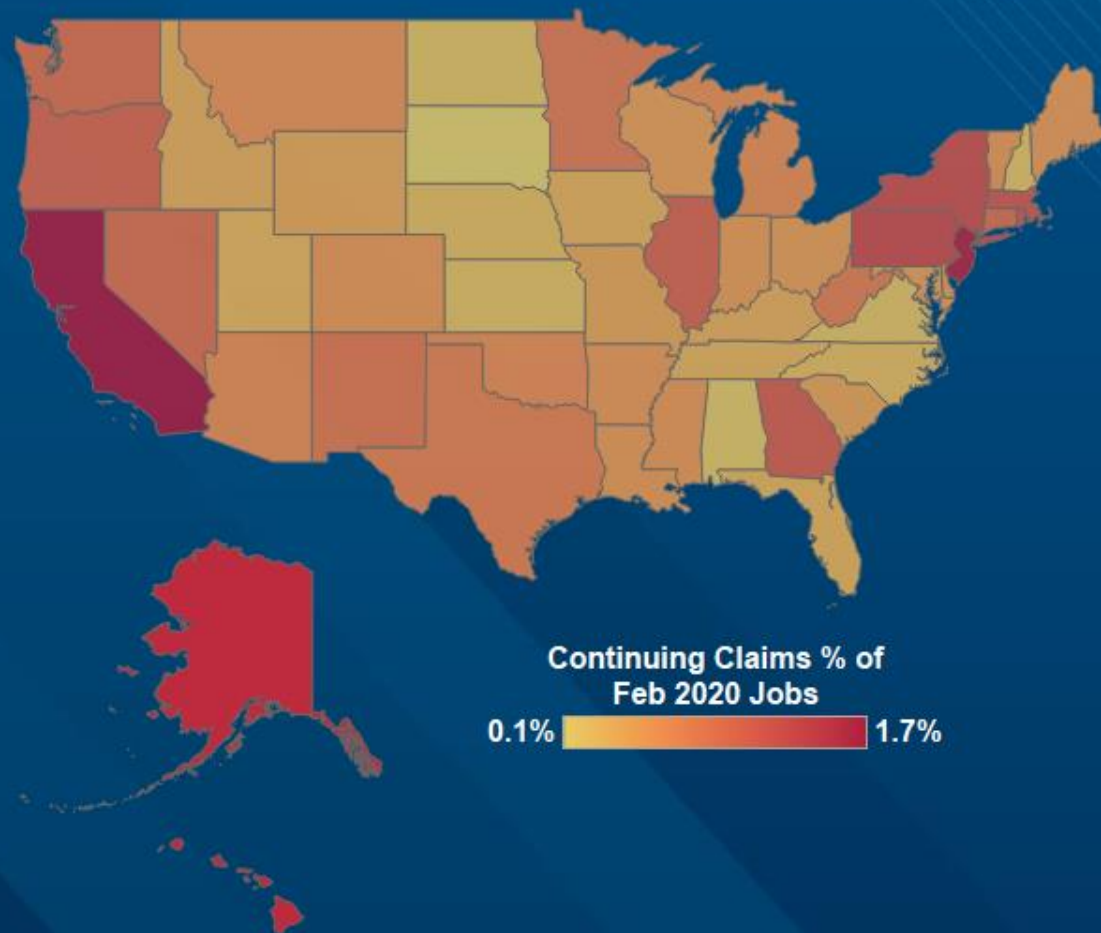
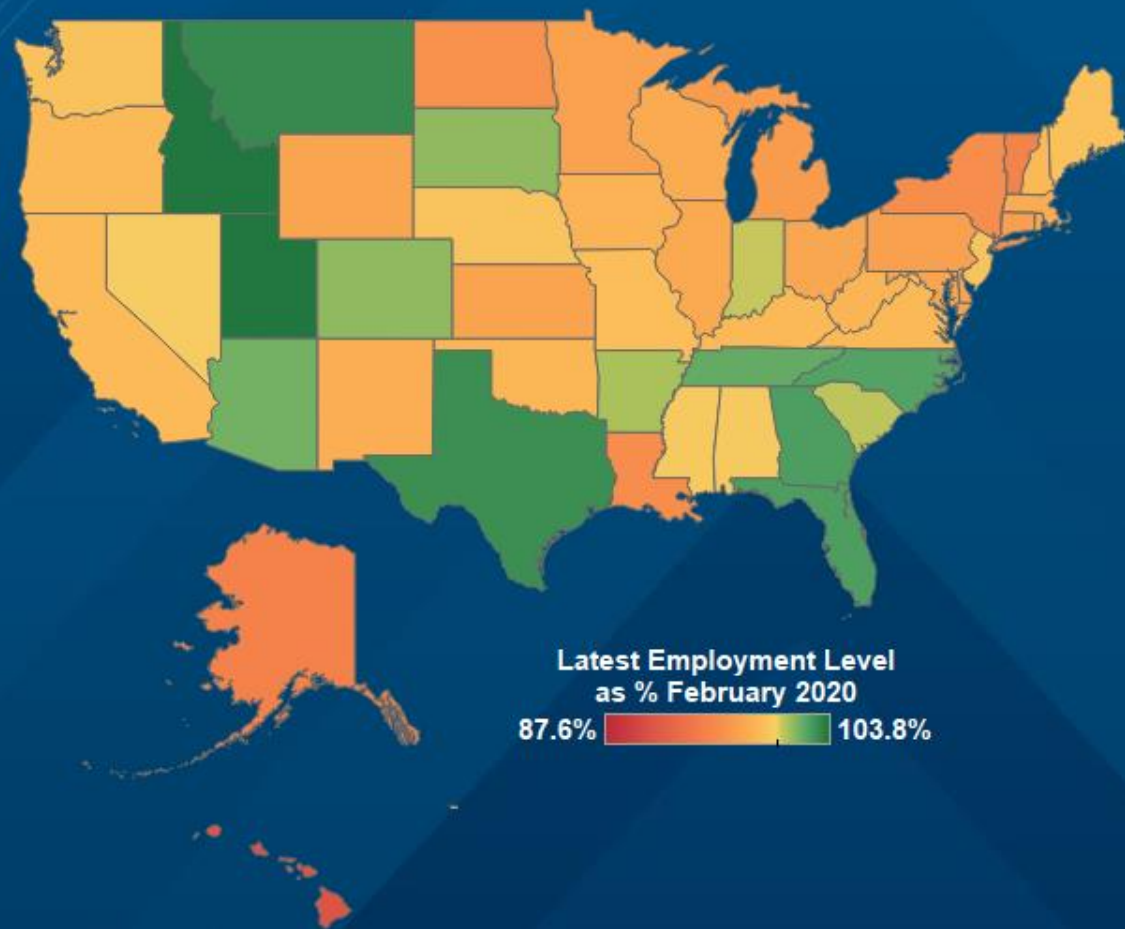


THE WAY
FORWARD

Driven by COX AUTOMOTIVE

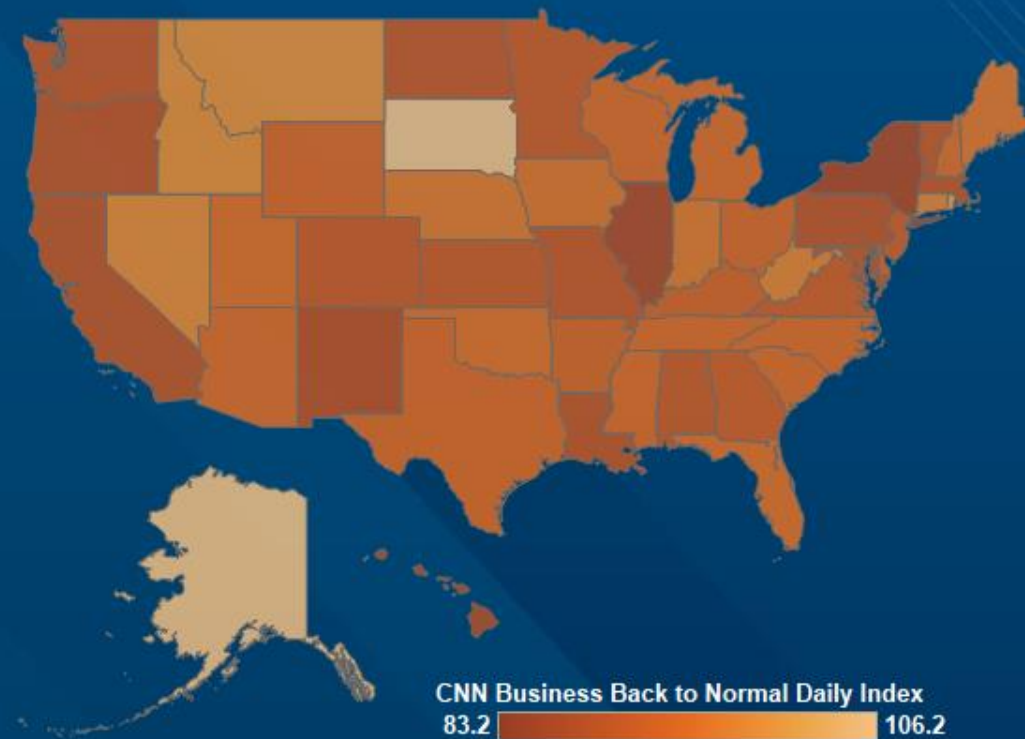
Source: Our World in Data

CONTINUING CLAIMS AT 1.3 MILLION NATIONALLY



ACTIVITY RECOVERY STALLING

Moody's-CNN Business Back-To-Normal Index (February 29 = 100)
Data as of January XX, 2022



THE WAY
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Source: Moody's Analytics; CNN

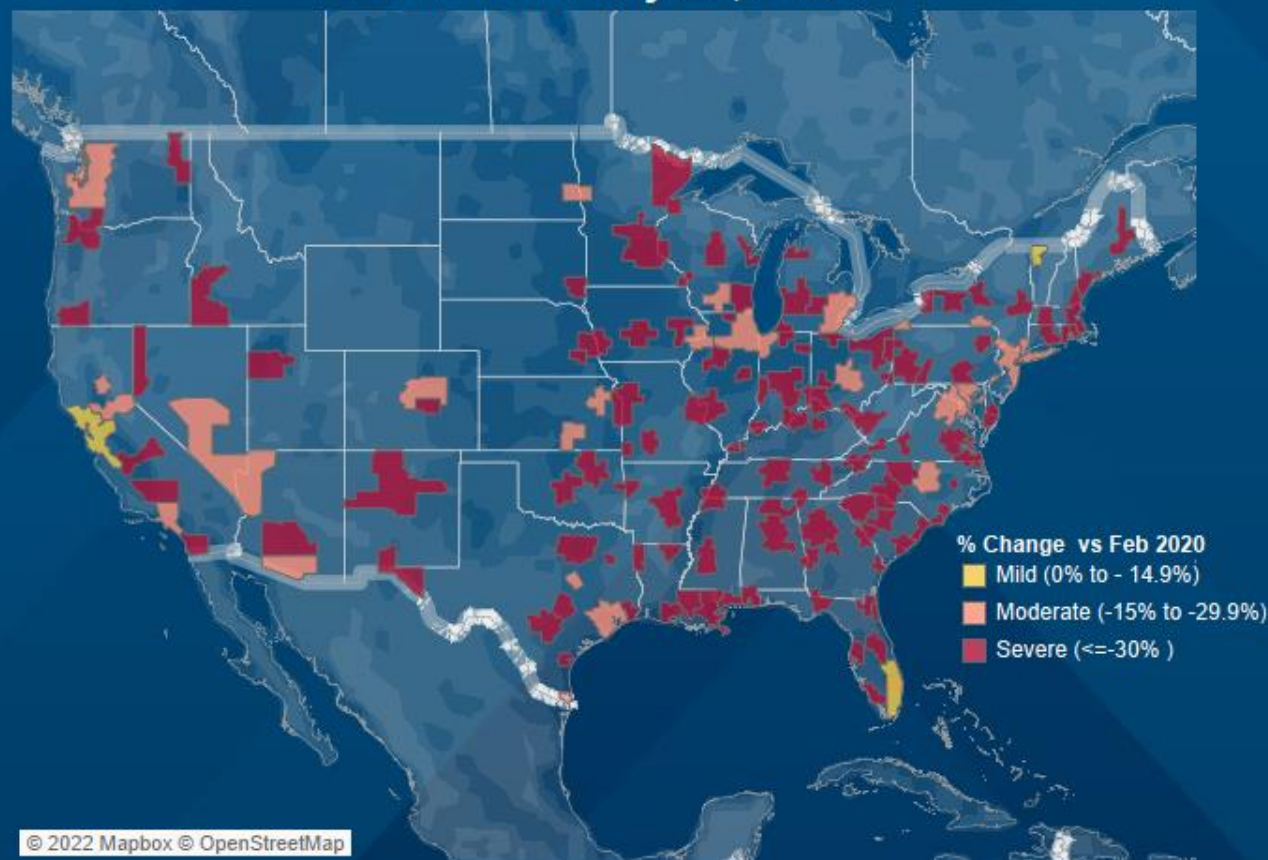
CONSUMER SENTIMENT DECLINED LAST WEEK

Morning Consult's Index of Consumer Sentiment on Monday declined 0.2% w/w

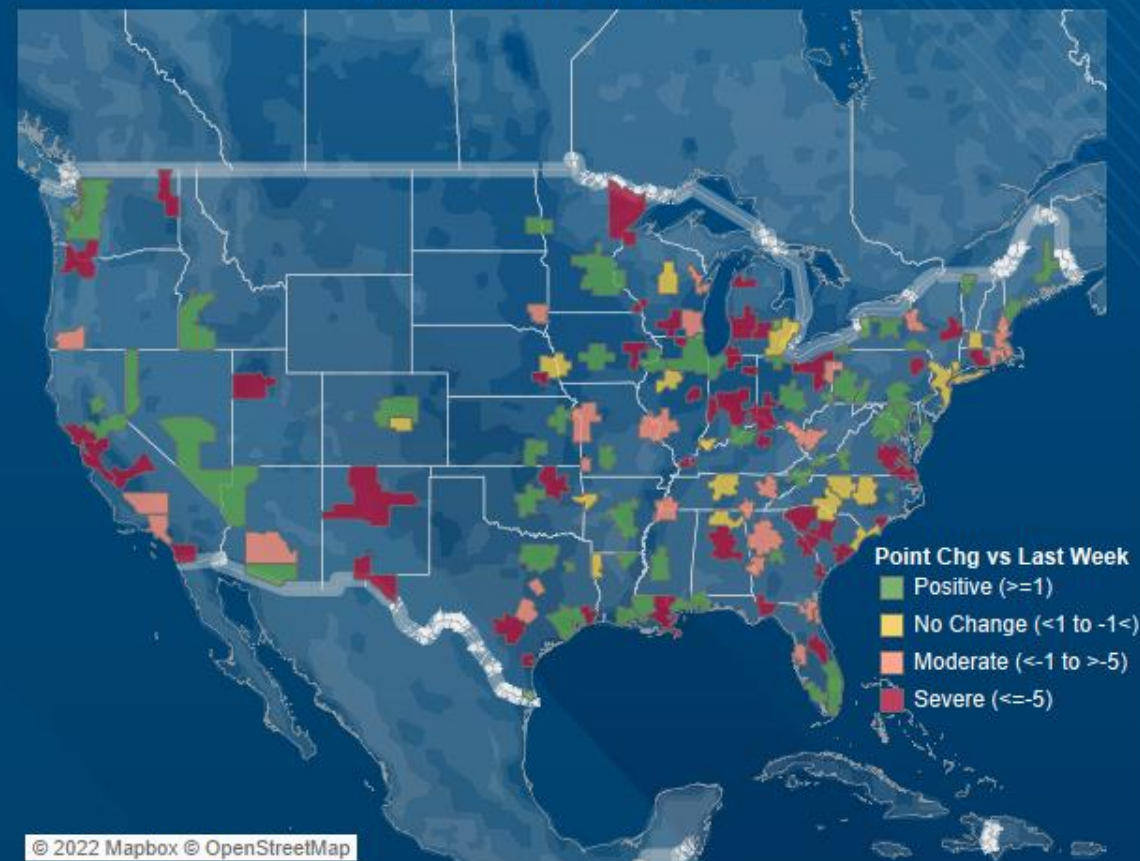


SENTIMENT SHIFTS ACROSS MARKETS

Since February 29, 2020



Since June 13, 2022



THE WAY
FORWARD

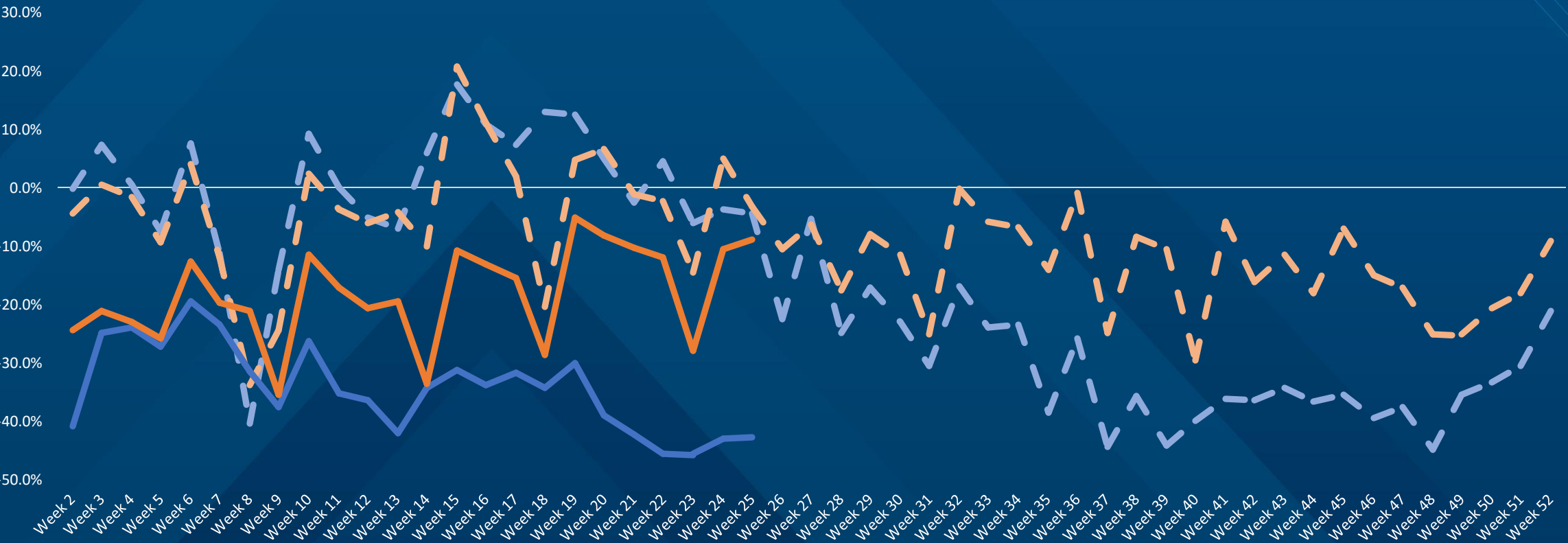
Driven by COX AUTOMOTIVE

Source: Morning Consult

RETAIL SALES ESTIMATES

2022 and 2021 % Change vs. 2019 in Retail Sales by Week

New 21/19 Used 21/19 New22/19 Used 22/19



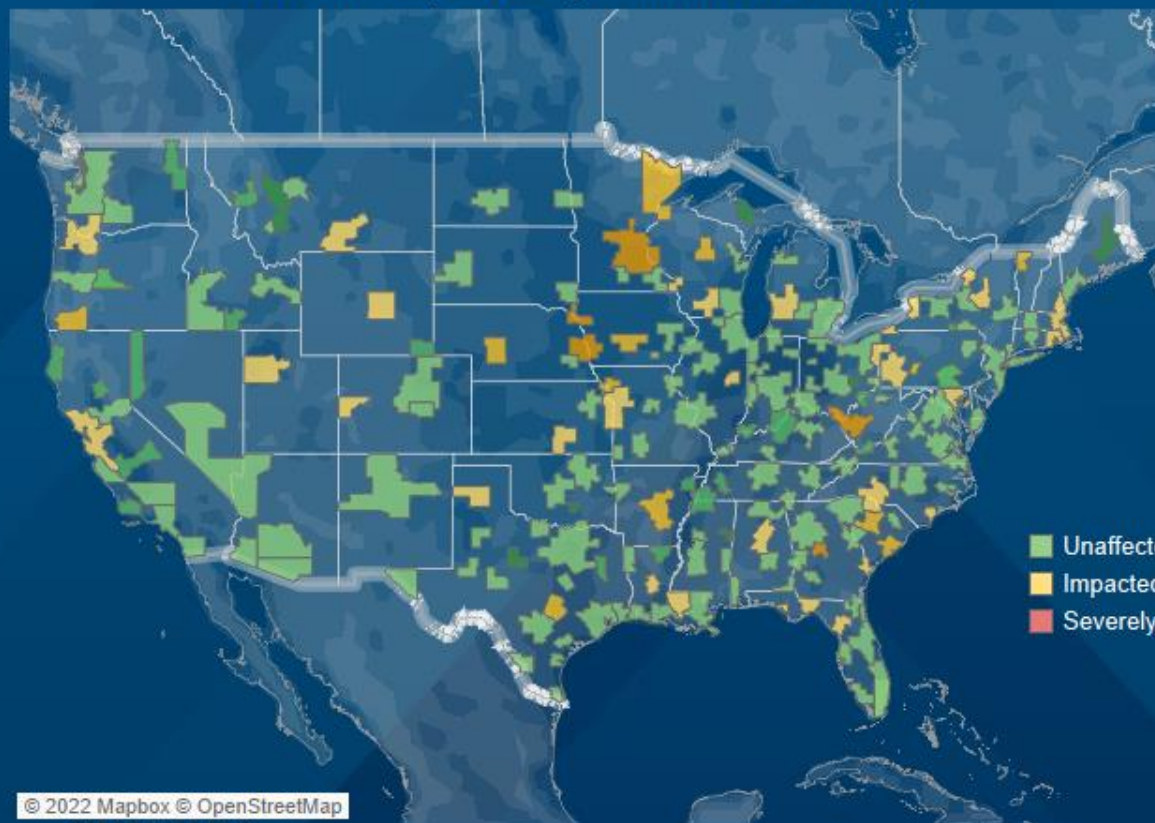
THE WAY
FORWARD

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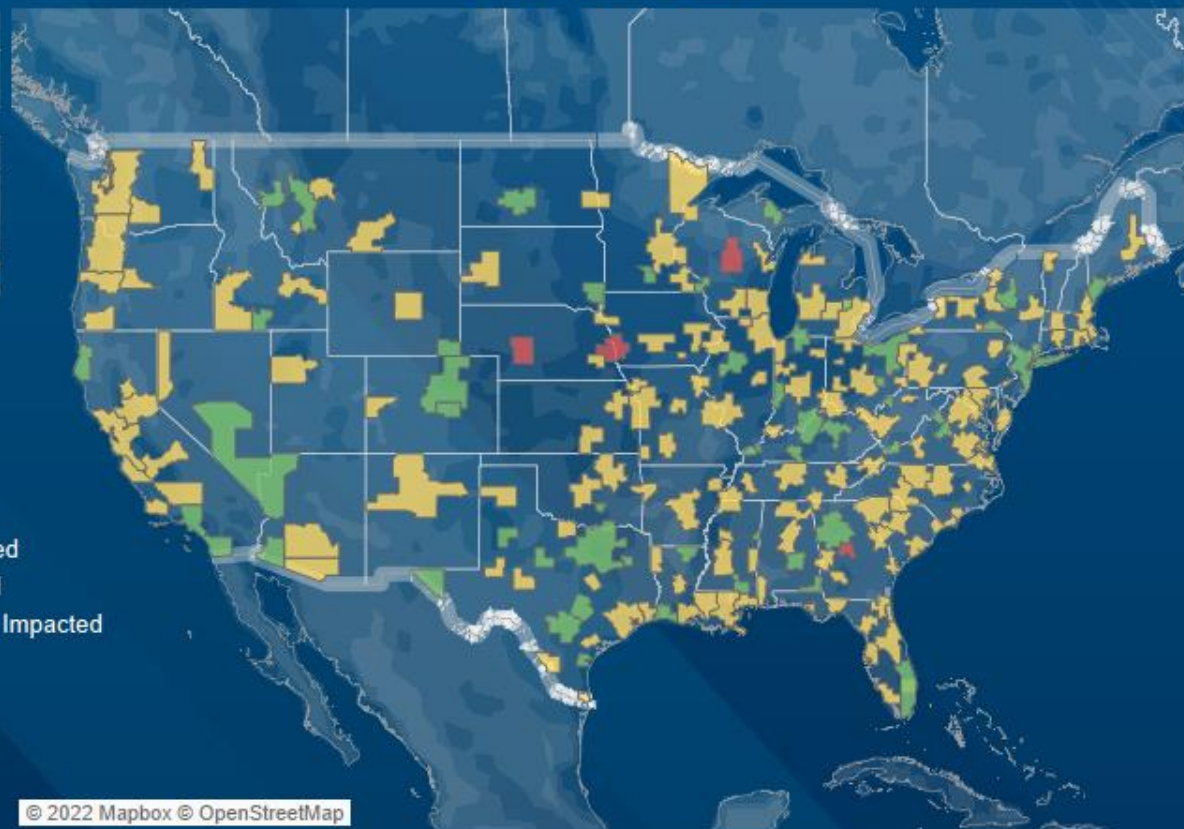
Source: Cox Automotive

SALES IMPACT VARIES BY DMA AS EVIDENCED BY UNIQUE CREDIT APPS

March 29, 2021 (vs same-week 2019)



June 18, 2022



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**THE WAY
FORWARD**

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Source: Cox Automotive

ZERO PERCENT FINANCING NOW UP SLIGHTLY



SUPPLY TIGHT IN NEW, NORMAL IN USED

New Days' Supply



Used Days' Supply



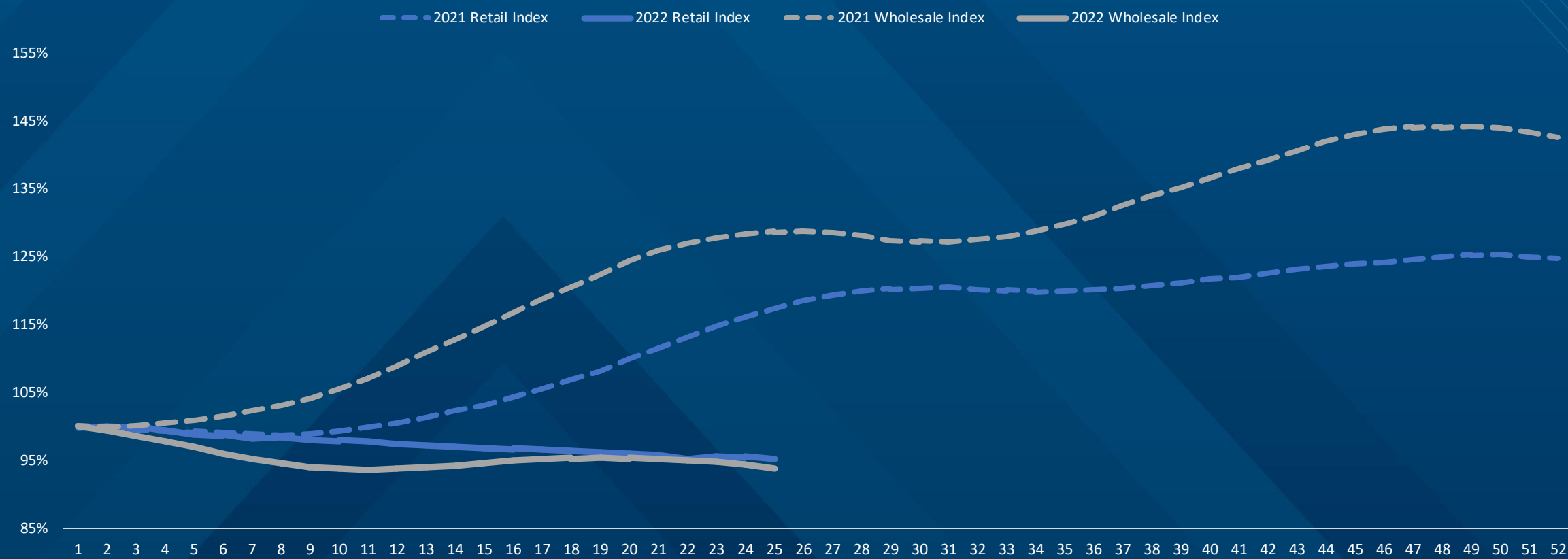
THE WAY
FORWARD

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Source: vAuto

USED PRICES BACK TO DEPRECIATION

MY 2019 Retail and Wholesale Price Indices



COX AUTOMOTIVE LEADING INDICATORS

- Leads for far in June are down y/y on both Autotrader and Kelley Blue Book:
 - Visits and leads are up for the month compared to May on Autotrader
- Credit applications on Dealertrack down w/w:
 - Unique applications on same-store basis last week were down 23% y/y with declining trend
- Service trends on Xtime relative to last year were stable last week:
 - Completed appointments last week were down 8% y/y

COX AUTOMOTIVE

Autotrader 



CLUTCH

DEALER.COM

Dealertrack 

 DICKINSON
FLEET SERVICES

 F&I Express

FYUSION

 HOMENET
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LIVE MARKET VIEW

VinSolutions

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