

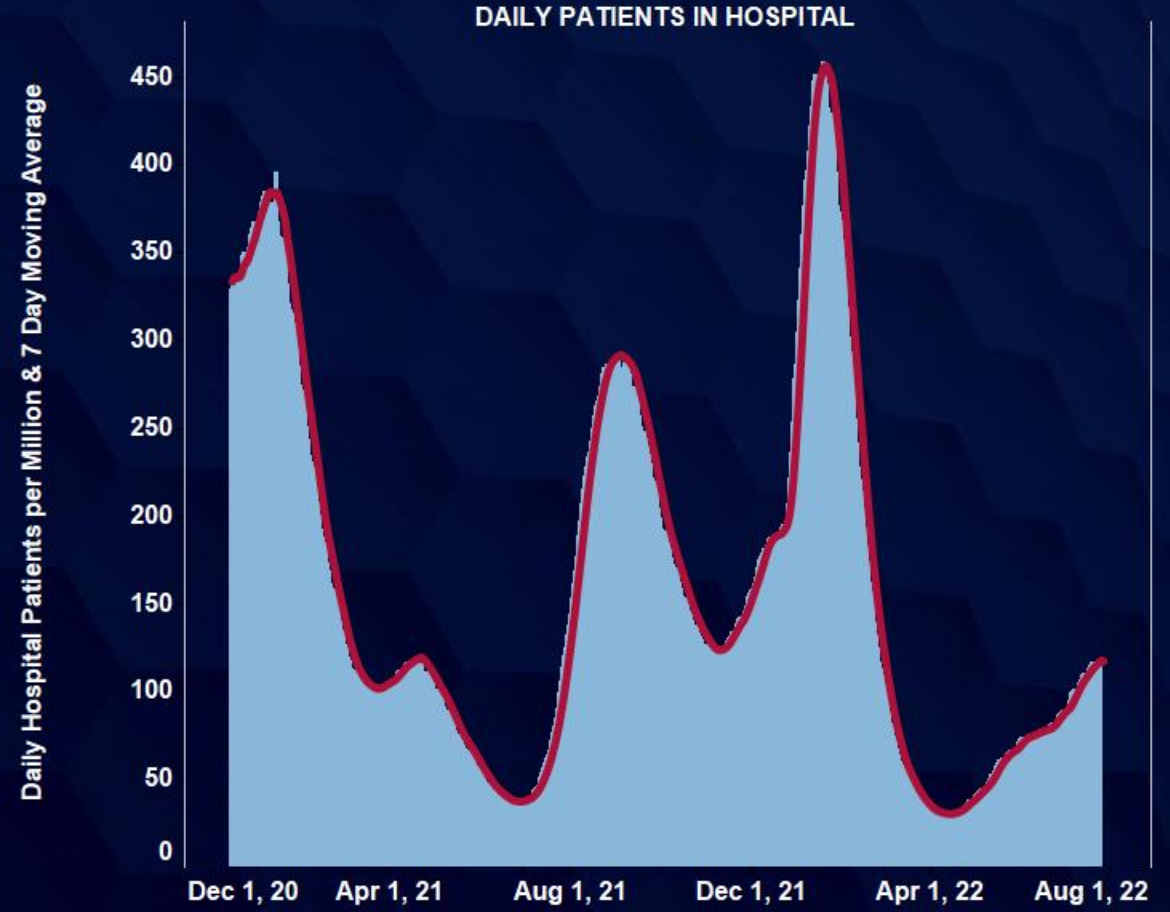
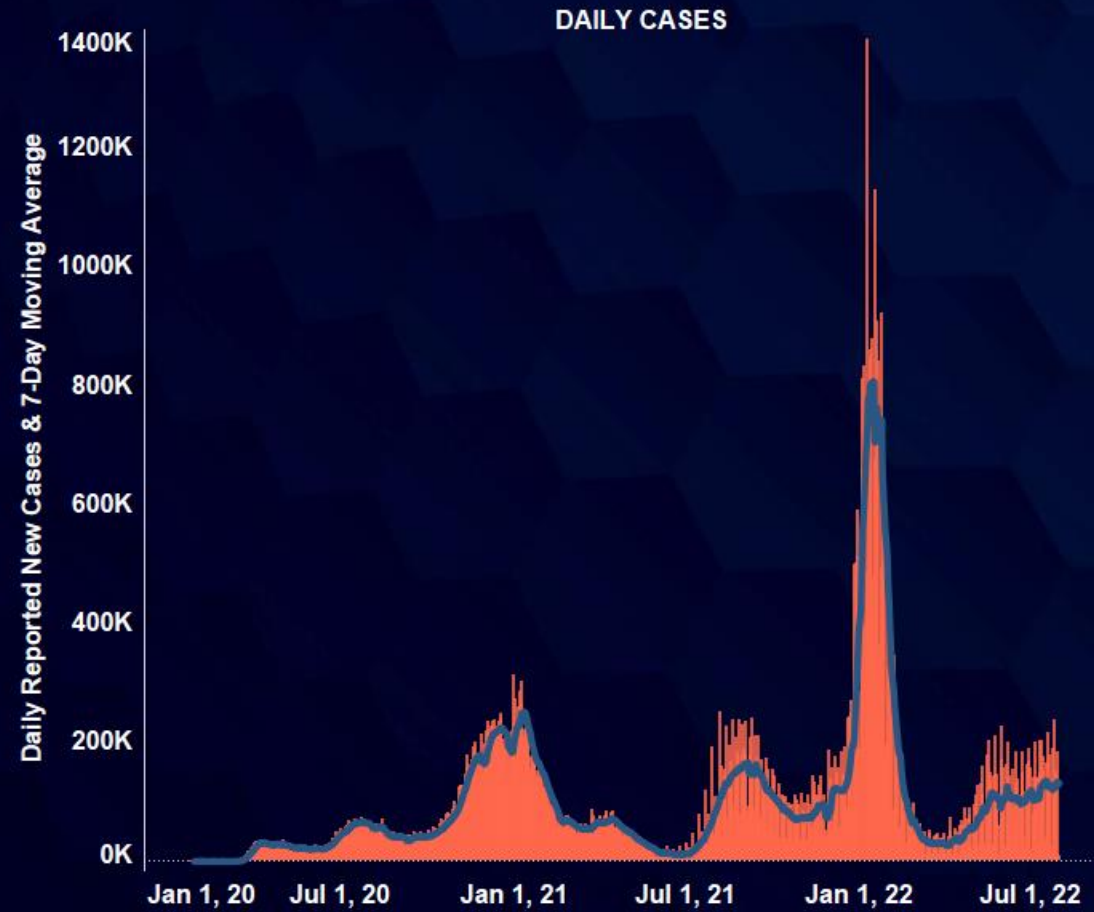


August 2, 2022

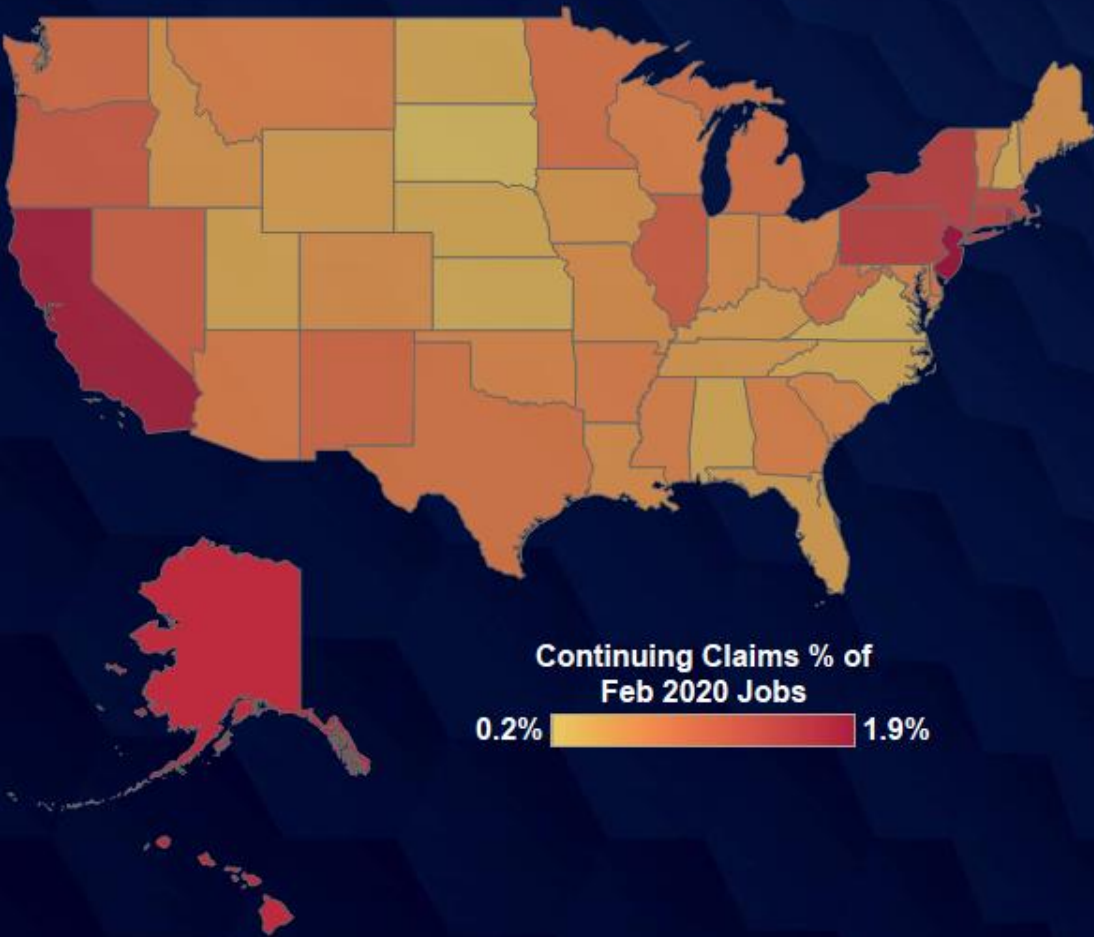
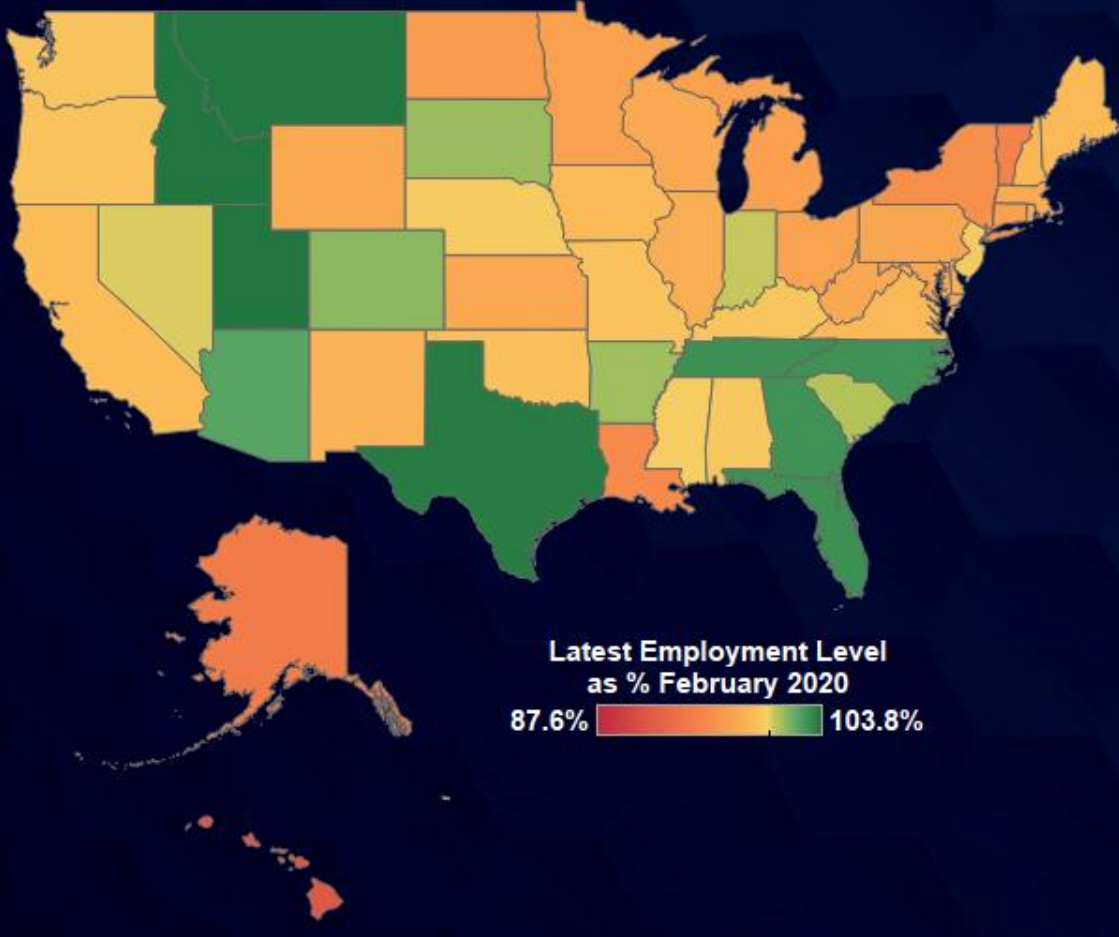
COX AUTOMOTIVE AUTO MARKET REPORT

Translating Data and Trends into Actionable Insights

Daily Case and Hospitalization Trends



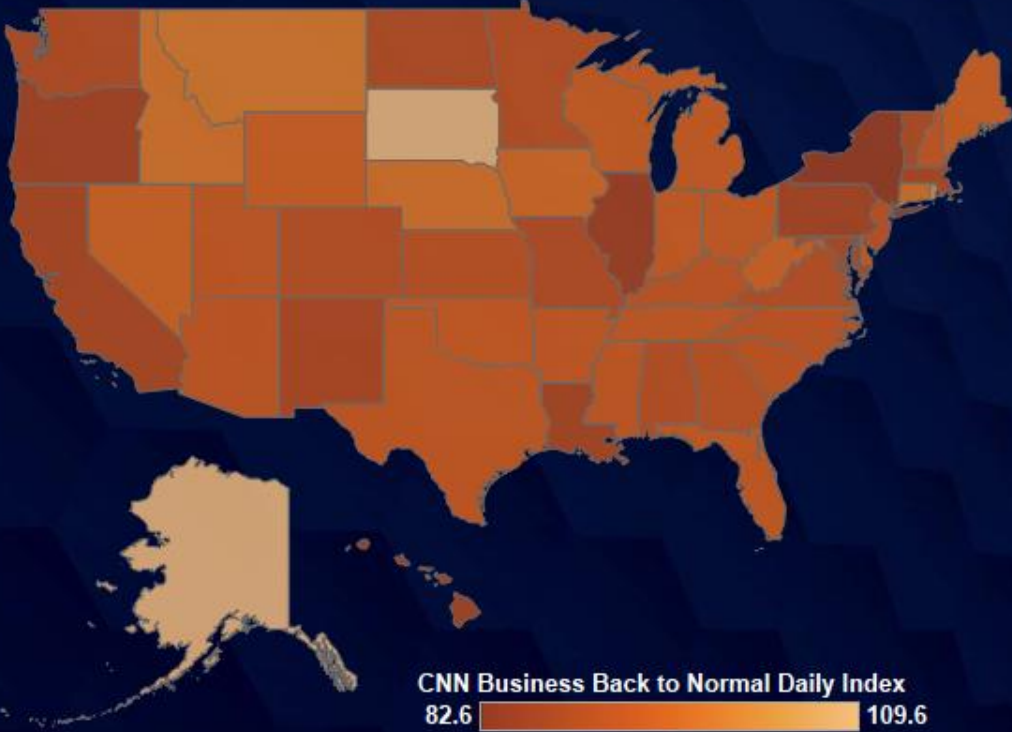
Continuing Claims at 1.36 Nationally



NOTE: Latest Employment Numbers for June 2022; Continuing Claims Unemployment Data for Week Ending July 9

Consumer Activity Has Plateaued

Moody's-CNN Business Back-To-Normal Index (February 29 = 100)



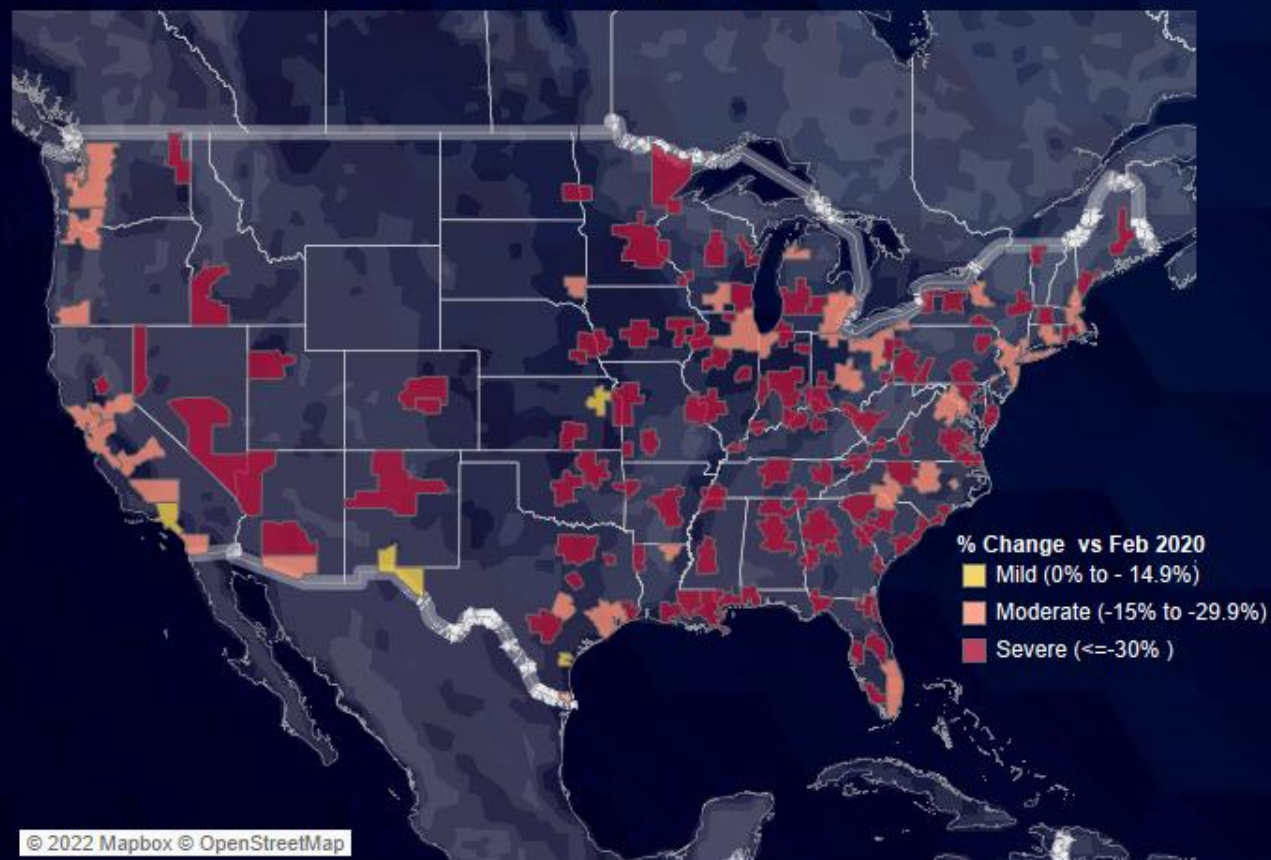
Consumer Sentiment Up in July

Morning Consult's Index of Consumer Sentiment bottomed on July 7 but ended July up 3.3% over June

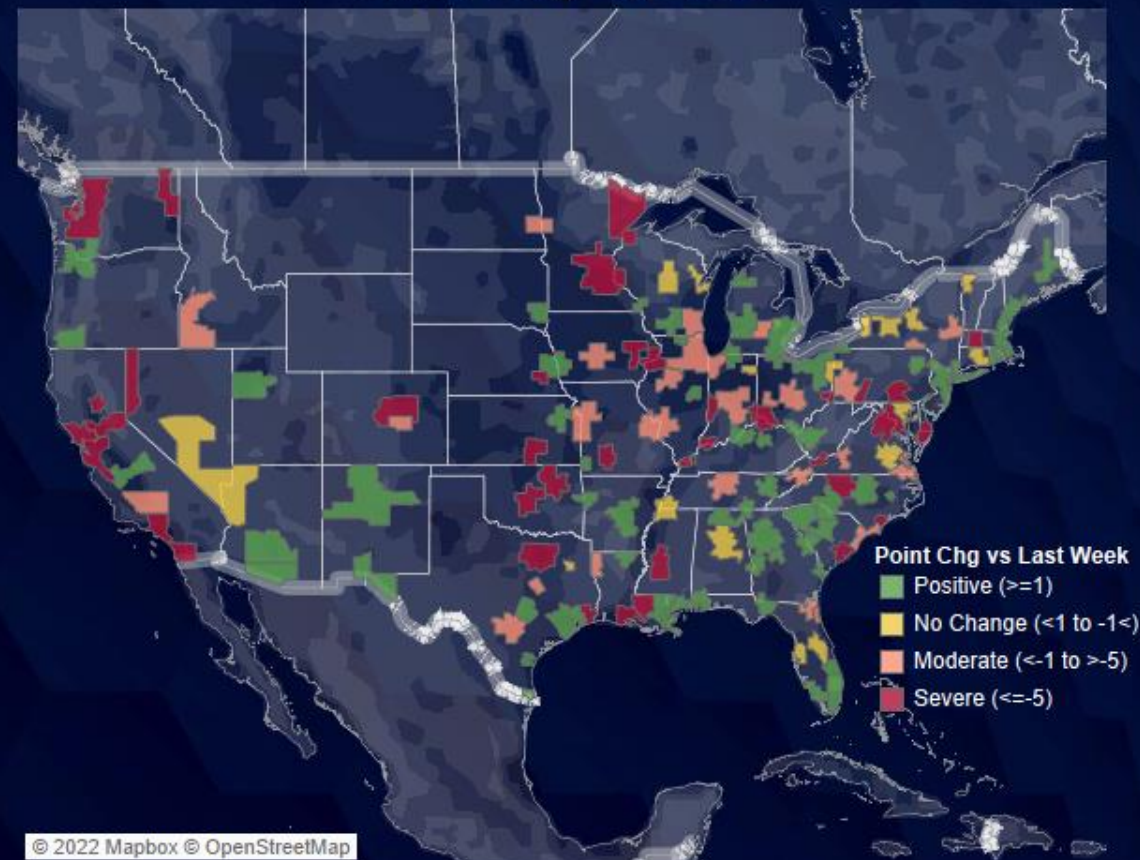


Sentiment Shifts Across Markets

Since February 29, 2020



Since July 25, 2022

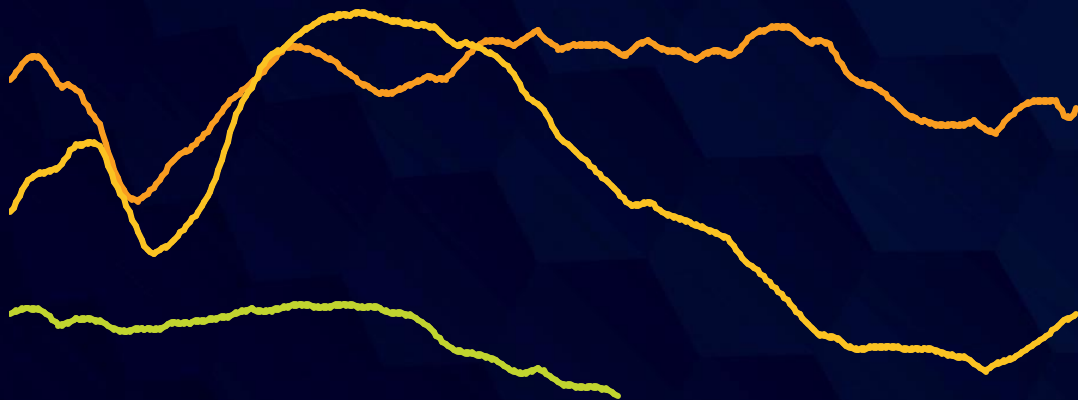


Retail Sales Estimates

Retail sales volumes softened w/w, but performance was stable relative to last year

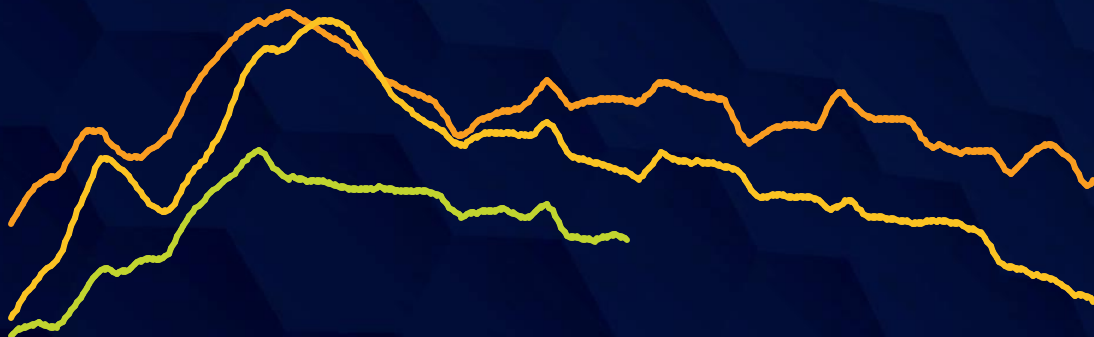
Dealertrack Retail New Sales

2019 2021 2022



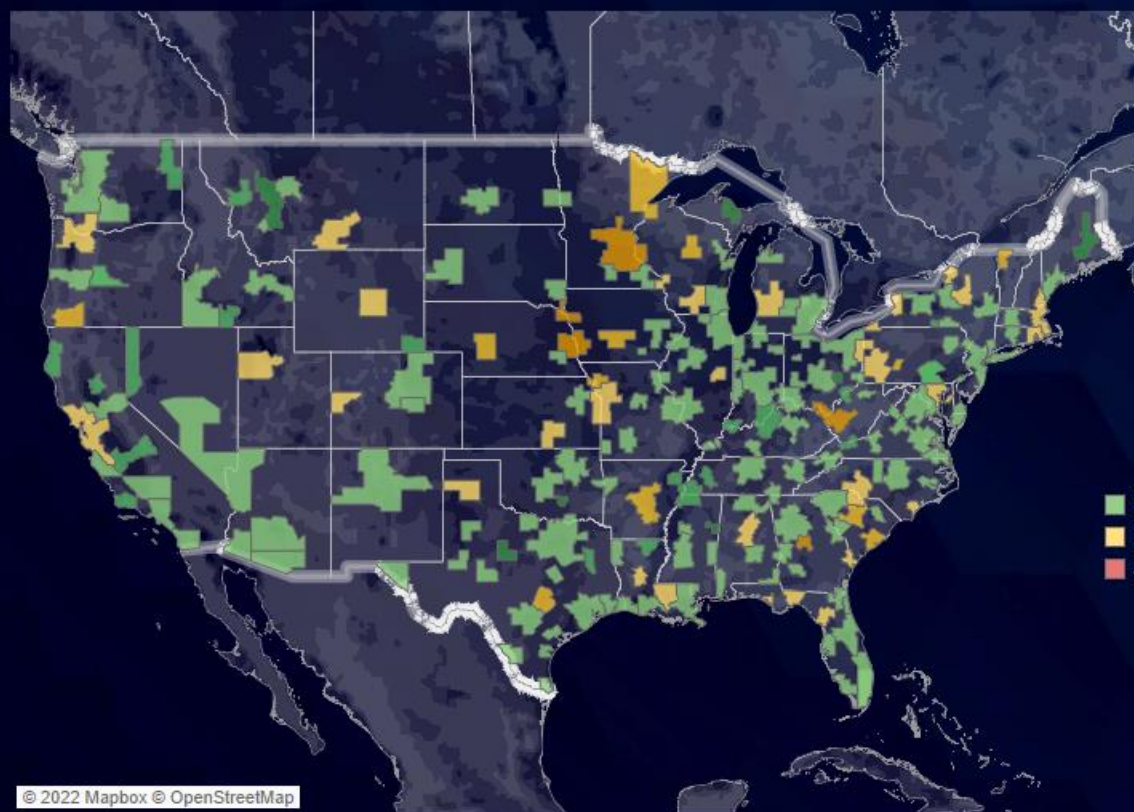
Dealertrack Retail Used Sales

2019 2021 2022

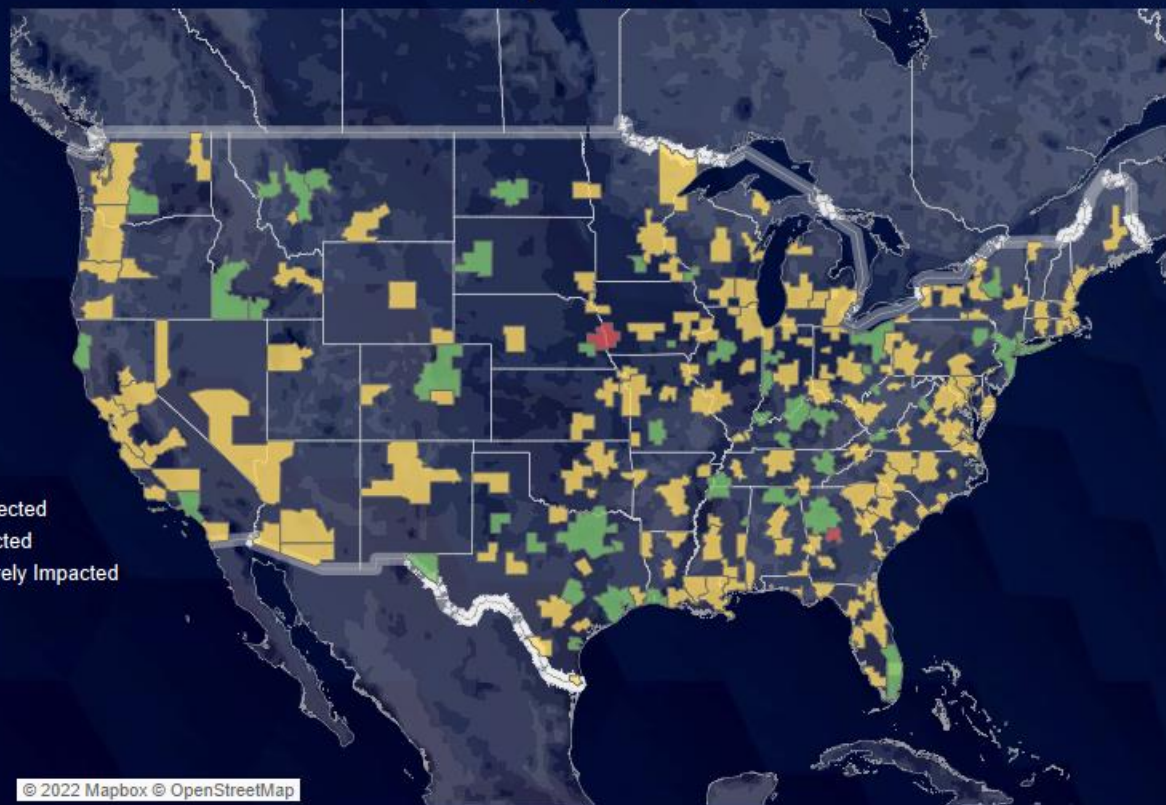


Sales Impact Varies by DMA

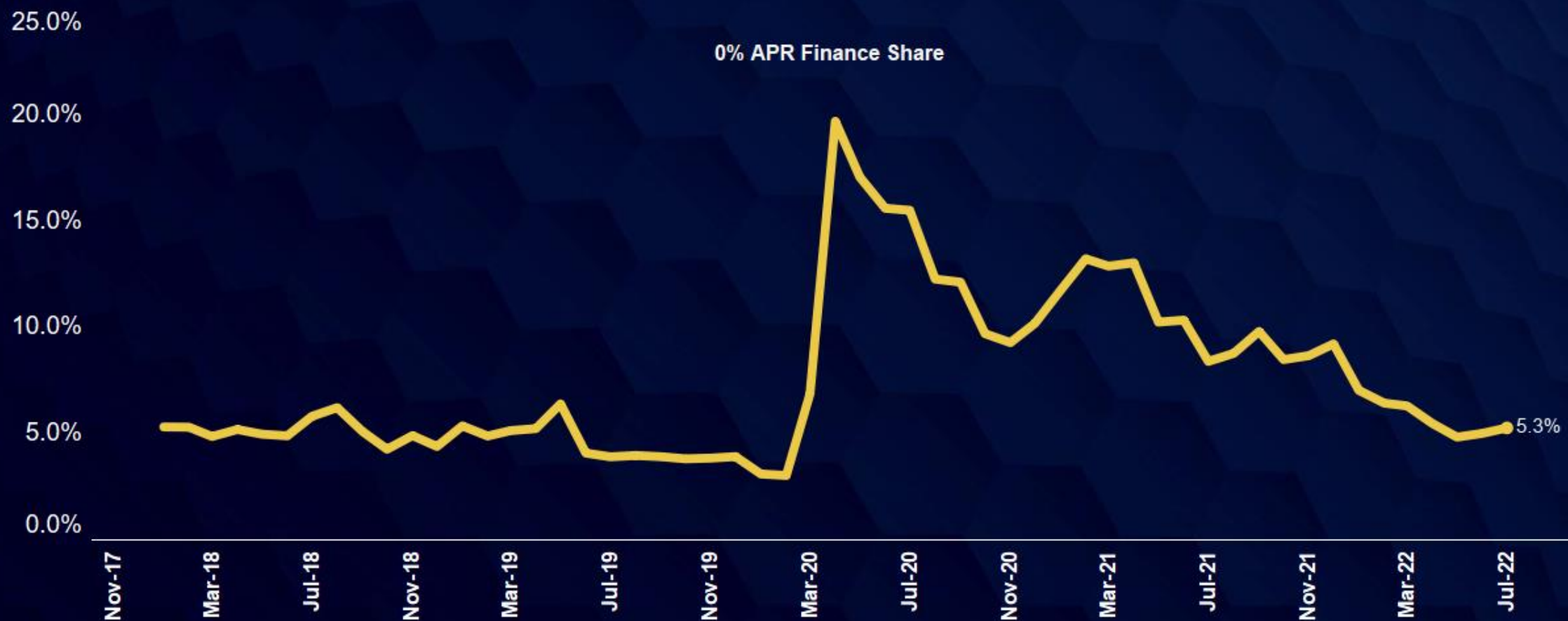
March 29, 2021 (vs same-week 2019)



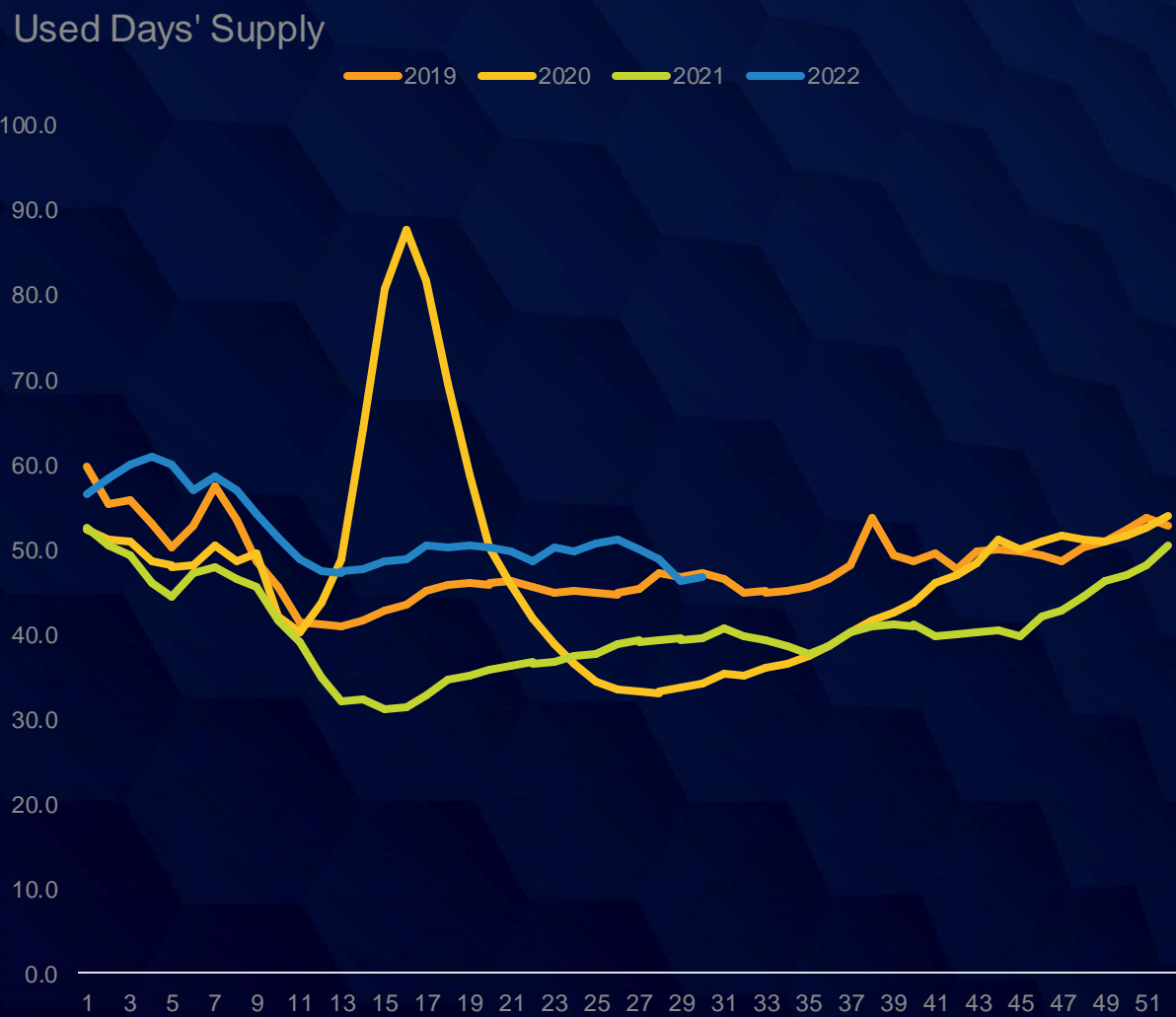
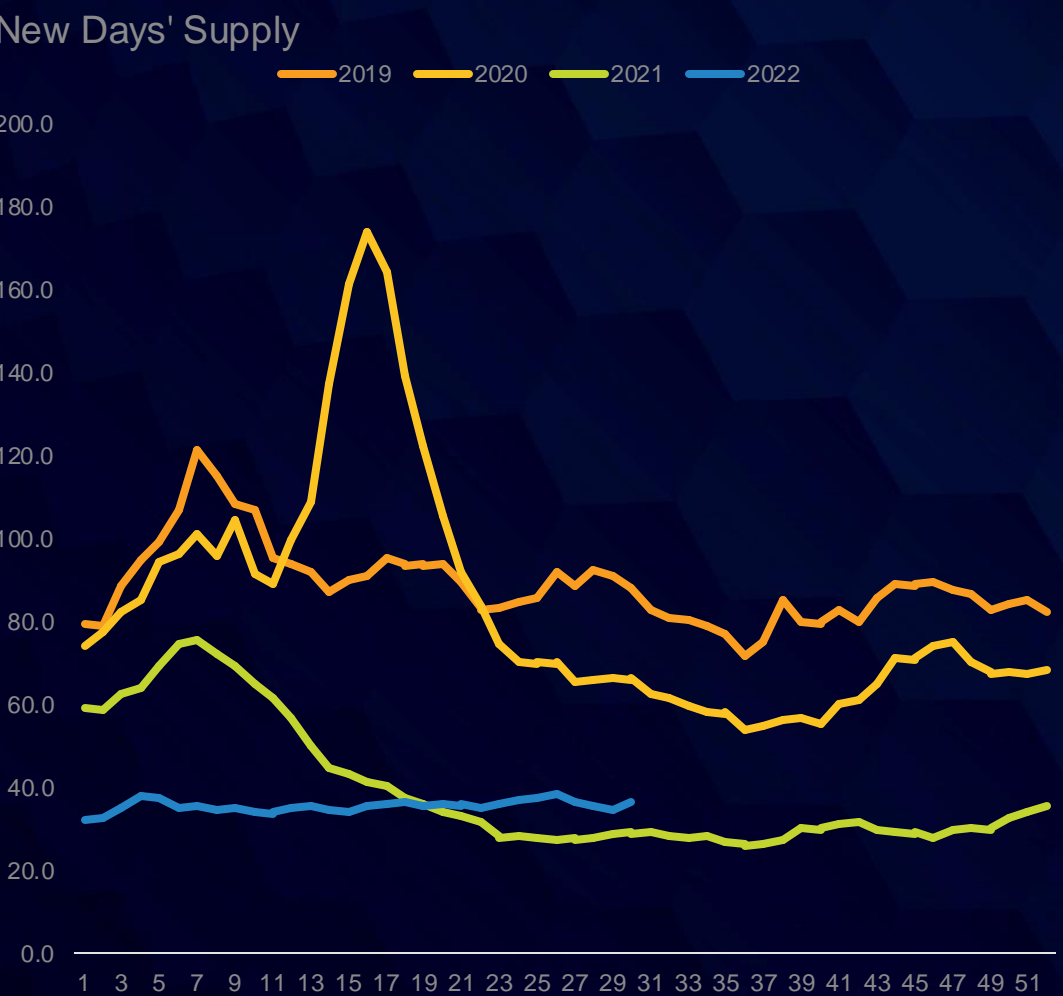
July 30, 2022



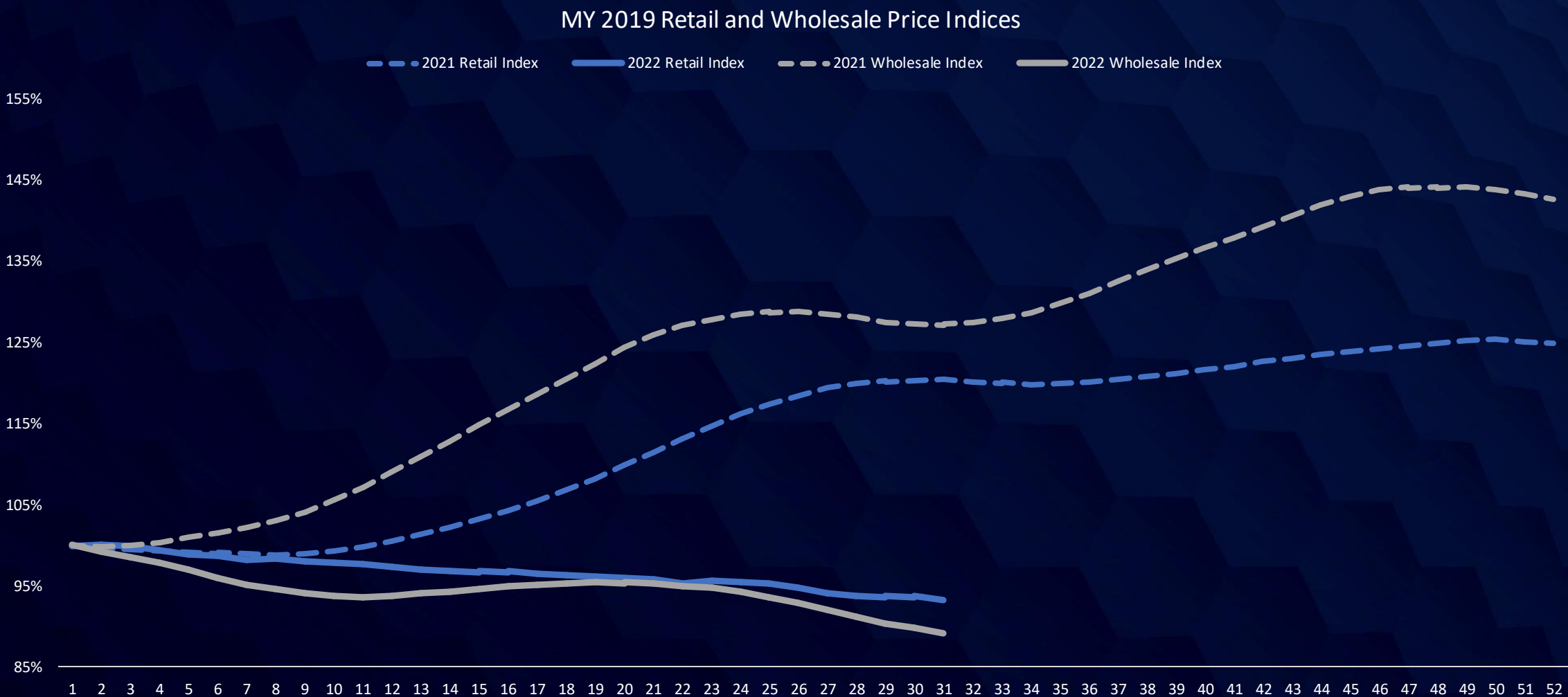
Zero Percent Financing



Retail Supply Remains Very Tight in New; Normal in Used



Used Prices Seeing Higher Than Normal Depreciation



Cox Automotive Leading Indicators

- Leads were down y/y in July on both Autotrader and Kelley Blue Book;
 - Visits were up for the month compared to June on both sites
- Credit applications on Dealertrack up w/w:
 - Unique applications on same-store basis last week were down 17% y/y with improving trend
- Service trends on Xtime relative to last year were stable last week:
 - Completed appointments last week were down 6% y/y

Cox AUTOMOTIVE

Autotrader 

DEALER.COM

Dealertrack 

Cox AUTOMOTIVE
DIGITAL RETAILING



Kelley Blue Book

 Manheim

NEXTGEAR
CAPITAL

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MOBILITY

vAuto
LIVE MARKET VIEW

VinSolutions

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