

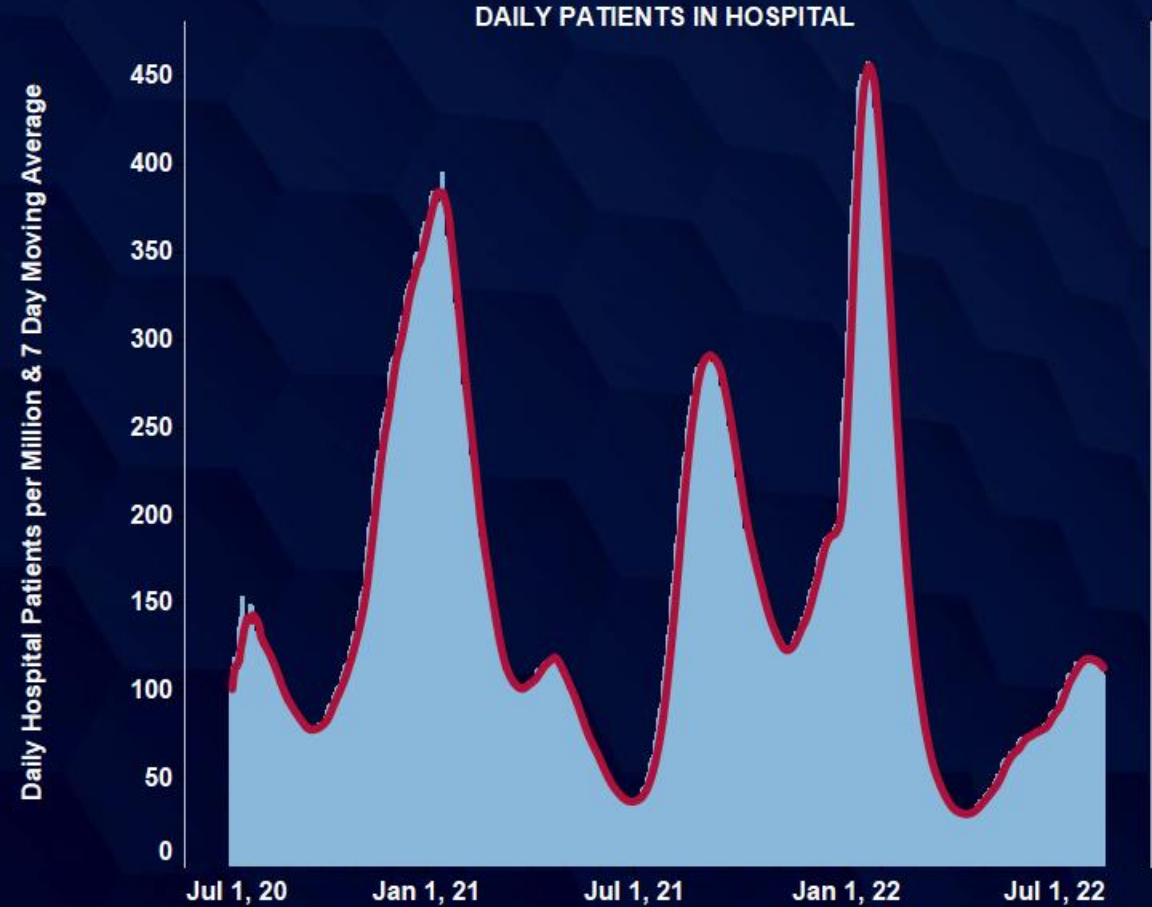
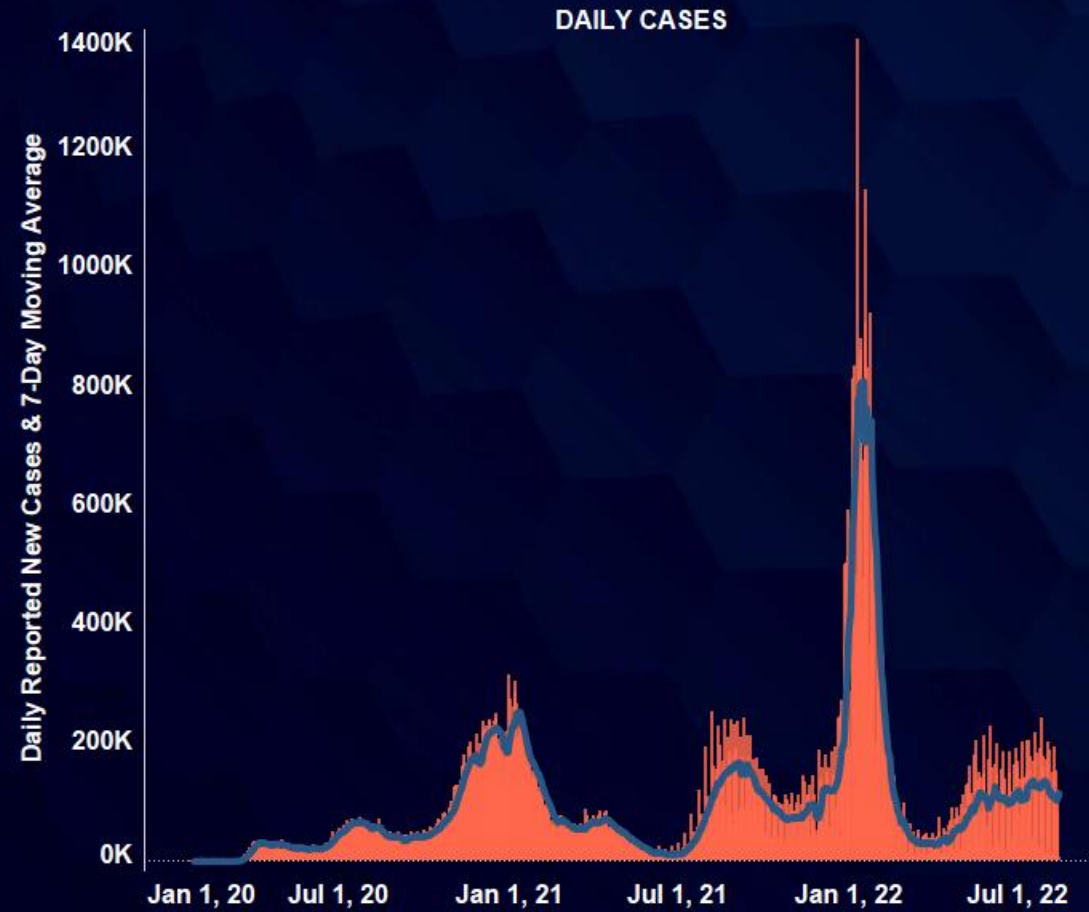


August 16, 2022

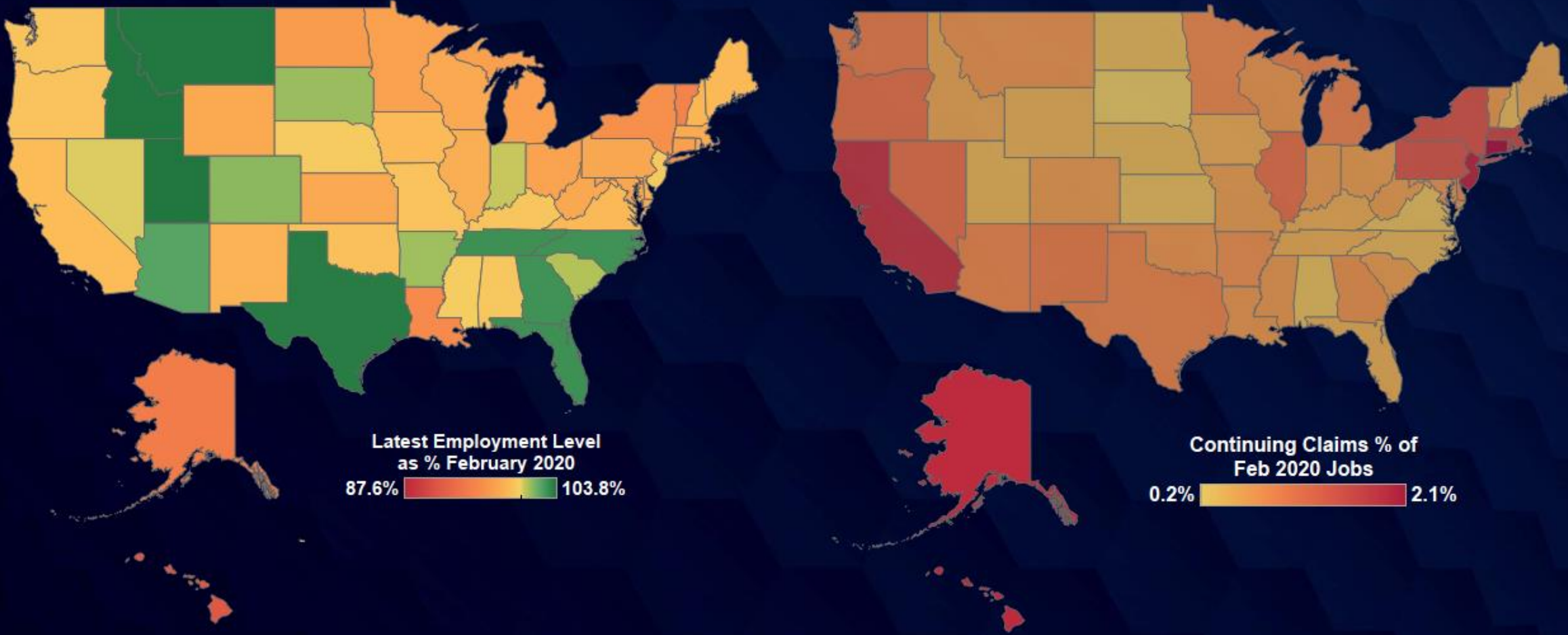
COX AUTOMOTIVE AUTO MARKET REPORT

Translating Data and Trends into Actionable Insights

Daily Case and Hospitalization Trends



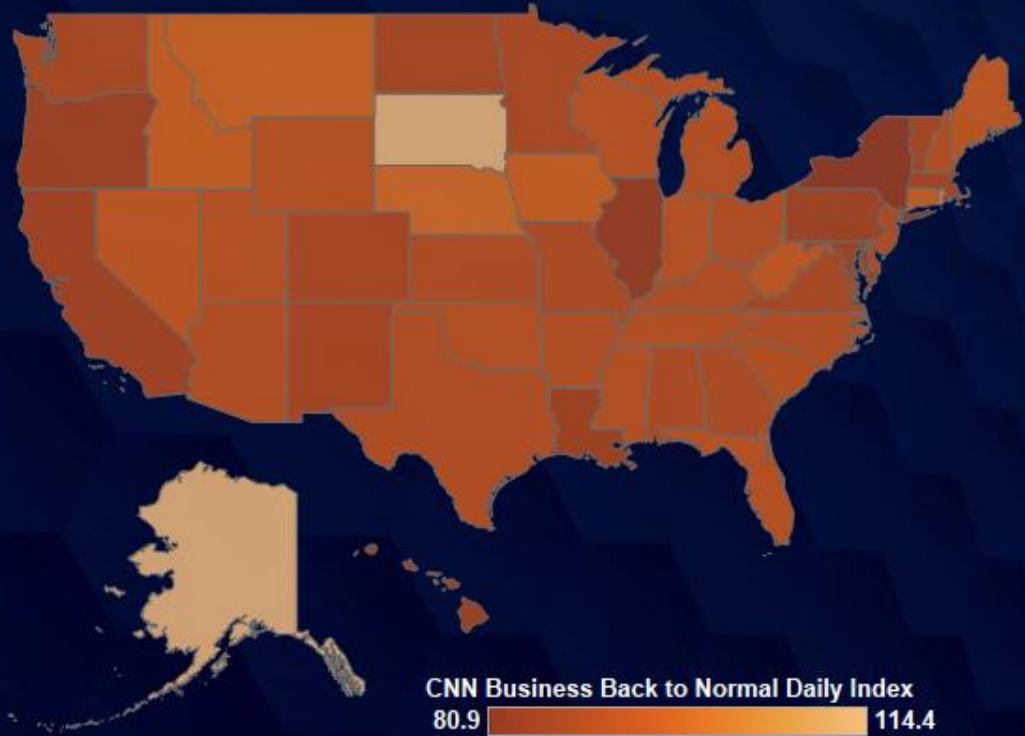
Continuing Claims at 1.43 Million Nationally



NOTE: Latest Employment Numbers for June 2022; Continuing Claims Unemployment Data for Week Ending July 23

Economic Activity Has Plateaued

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



CNN Business Back to Normal Daily Index
80.9 114.4

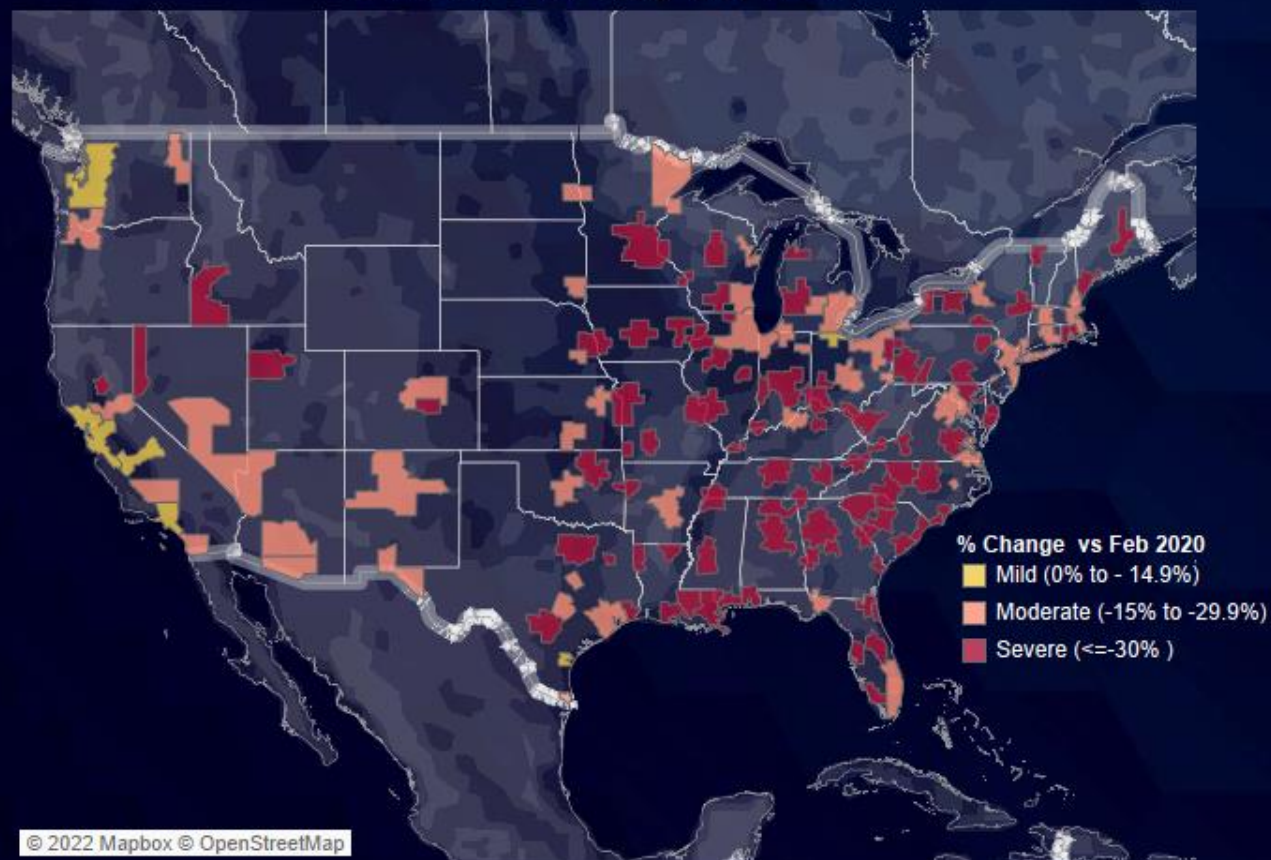
Consumer Sentiment Up from Low in Spring

The Index of Consumer Sentiment increased 3.3% in July and is up 4.9% so far in August

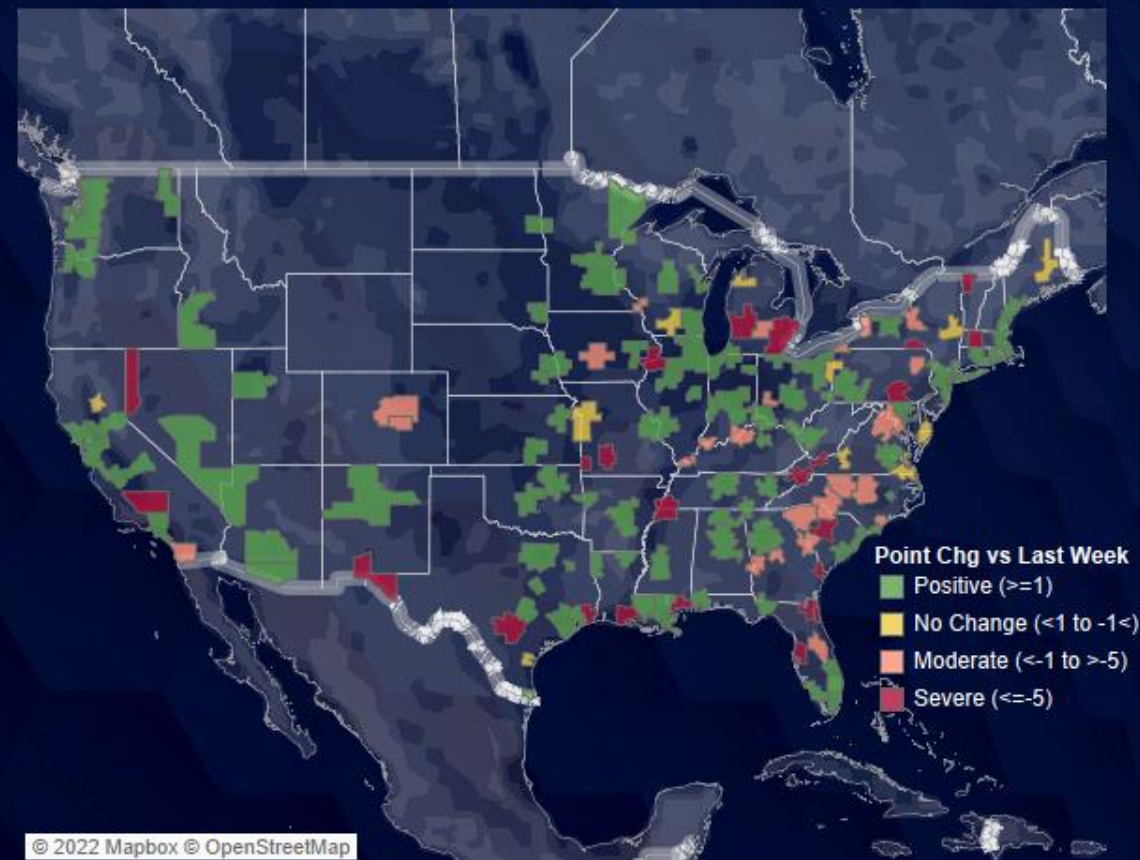


Sentiment Shifts Across Markets

Since February 29, 2020

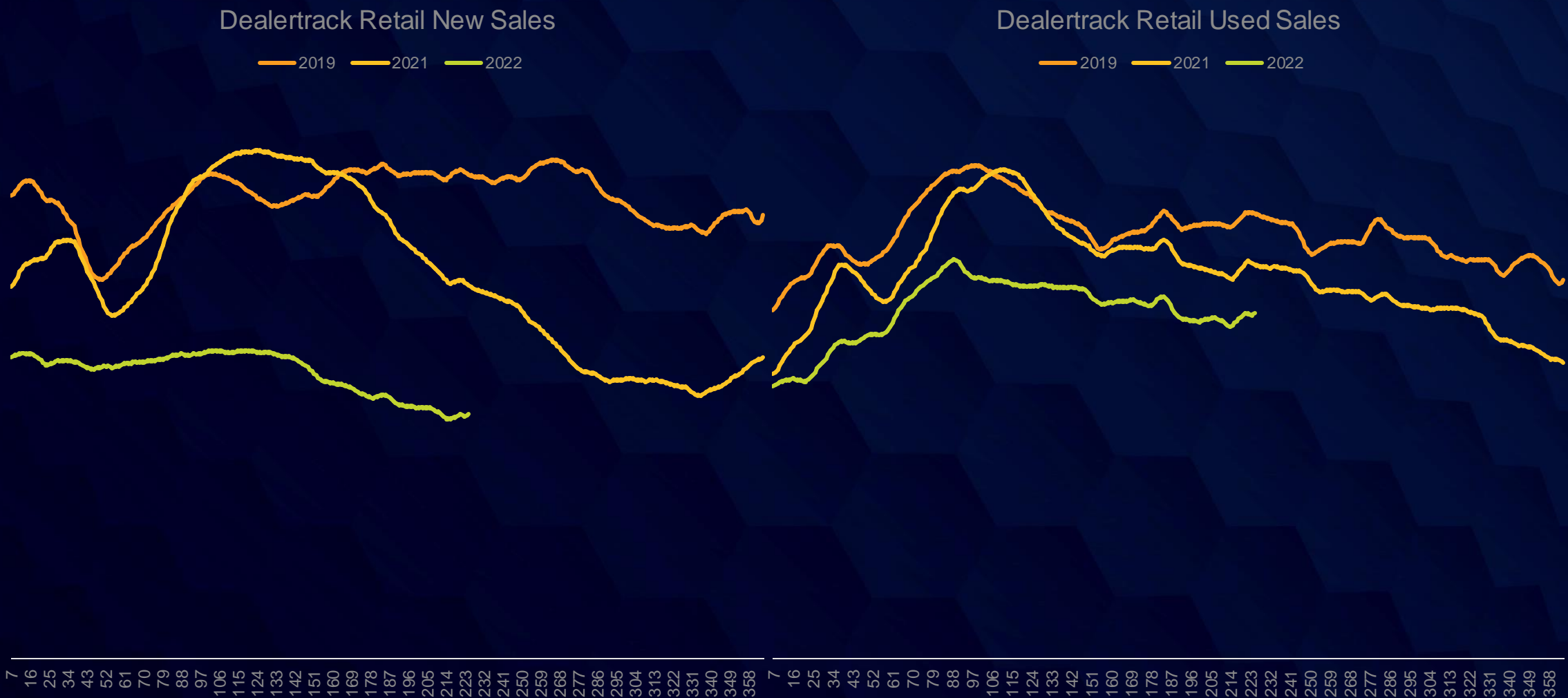


Since August 08, 2022



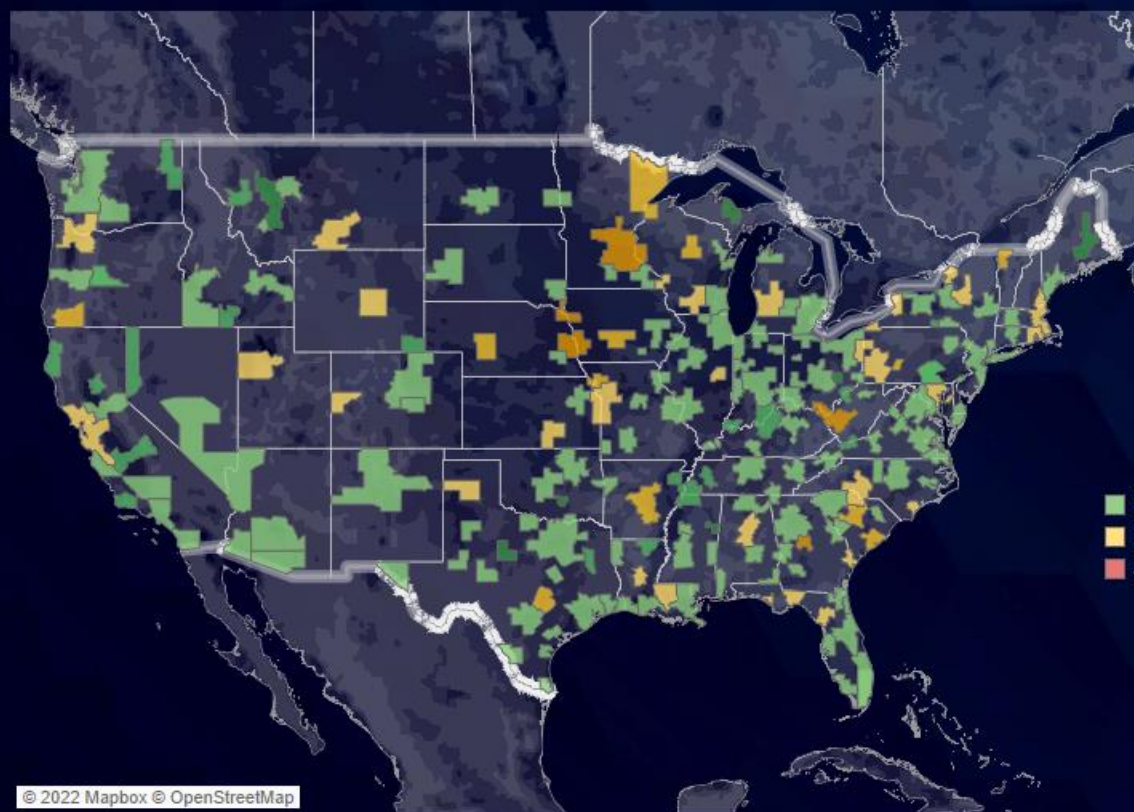
Retail Sales Estimates

New sales volumes were up w/w, and performance y/y improved; uses sales improved w/w but was unchanged y/y

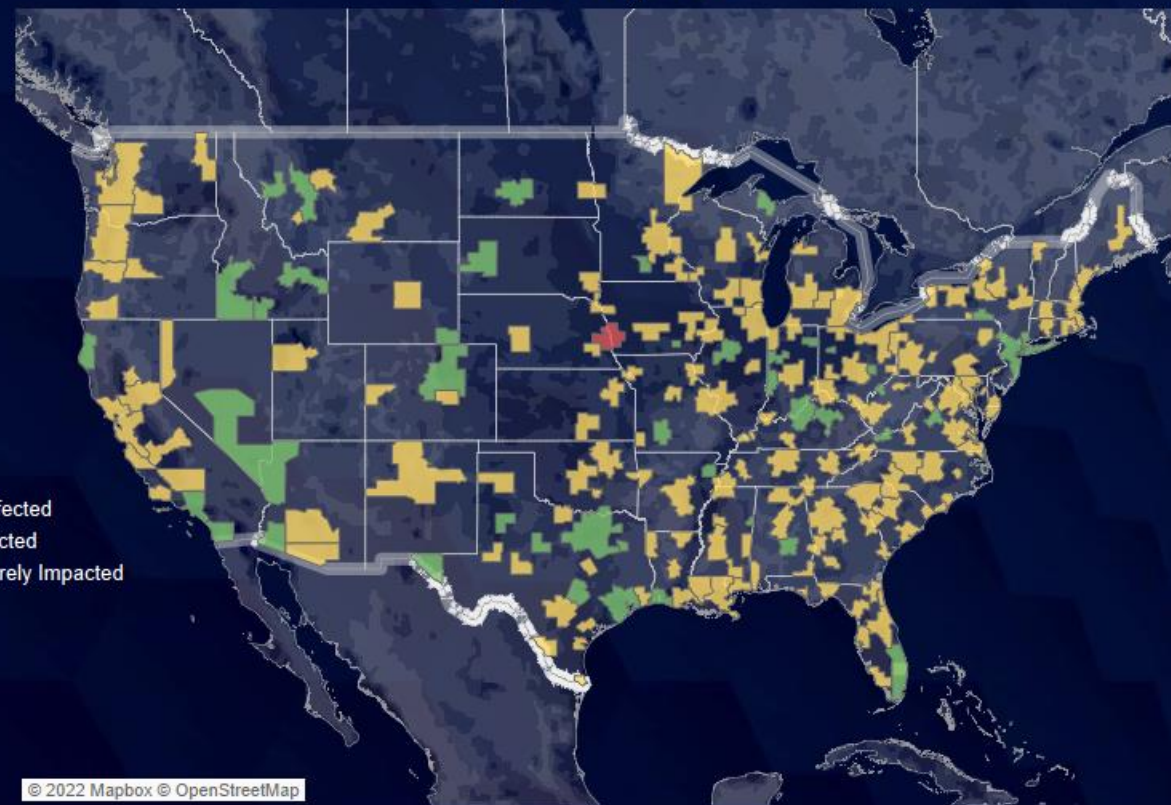


Sales Impact Varies by DMA

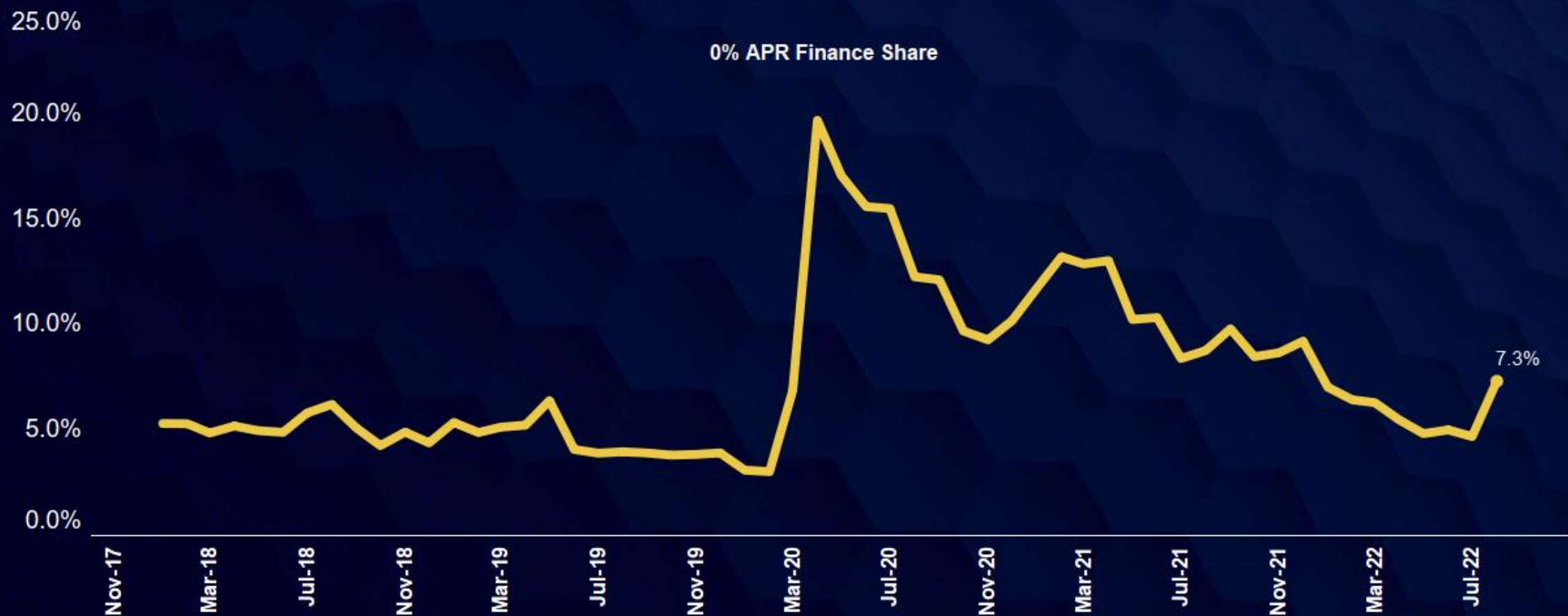
March 29, 2021 (vs same-week 2019)



August 13, 2022



Zero Percent Financing

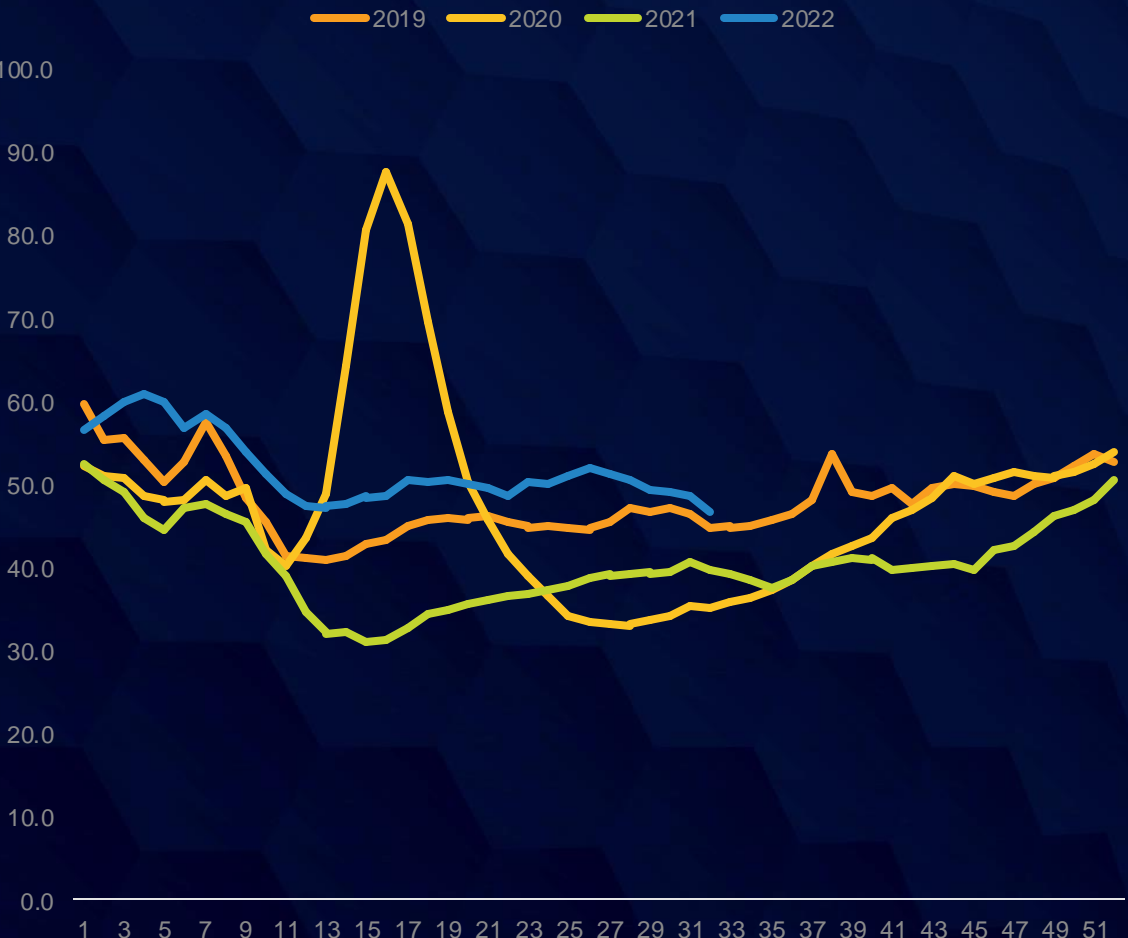


Retail Supply Remains Very Tight in New; More Normal in Used

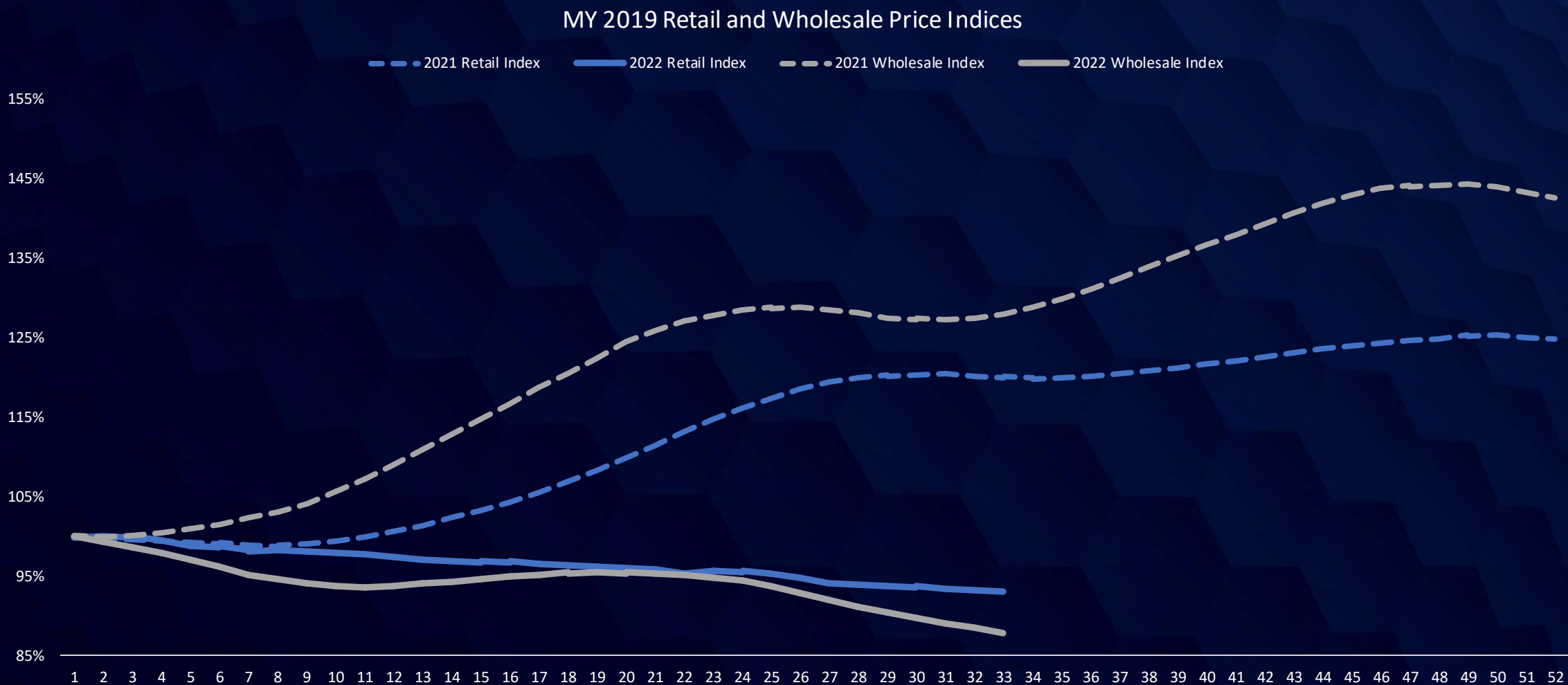
New Days' Supply



Used Days' Supply



Wholesale 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 improved last week:
 - Completed appointments last week were down 4% y/y

Cox AUTOMOTIVE

Autotrader 

DEALER.COM

Dealertrack 

Cox AUTOMOTIVE
DIGITAL RETAILING

 Kelley Blue Book

 Manheim

NEXTGEAR
CAPITAL

Cox AUTOMOTIVE
MOBILITY

vAuto
LIVE MARKET VIEW

VinSolutions

∞xtime