

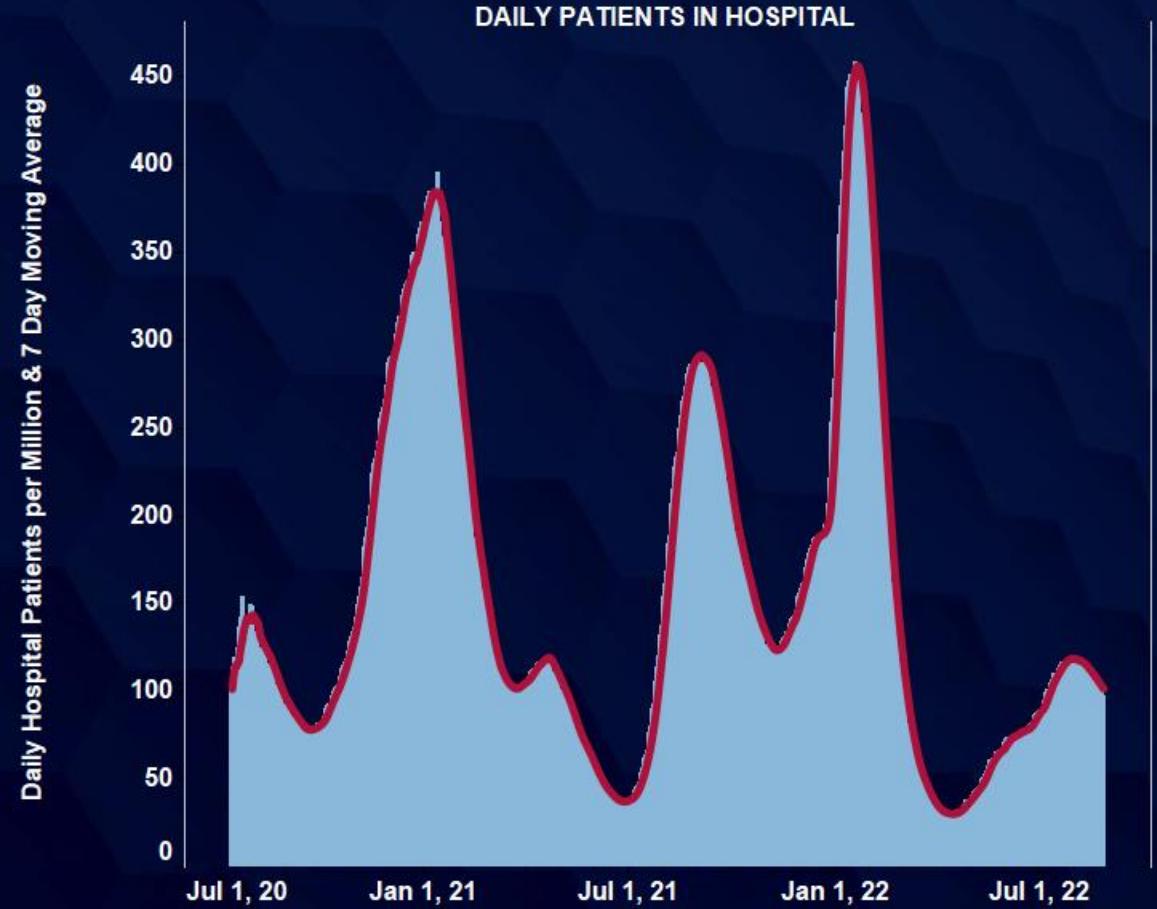
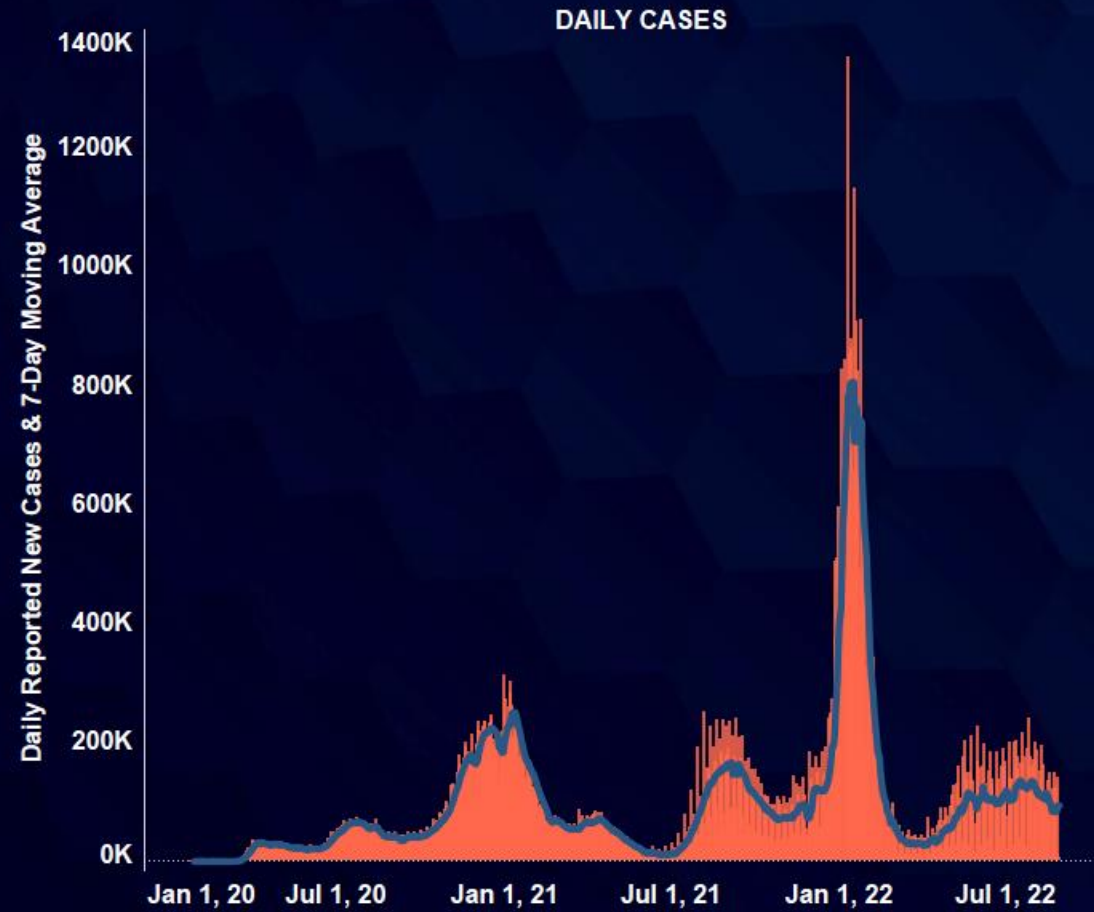


August 30, 2022

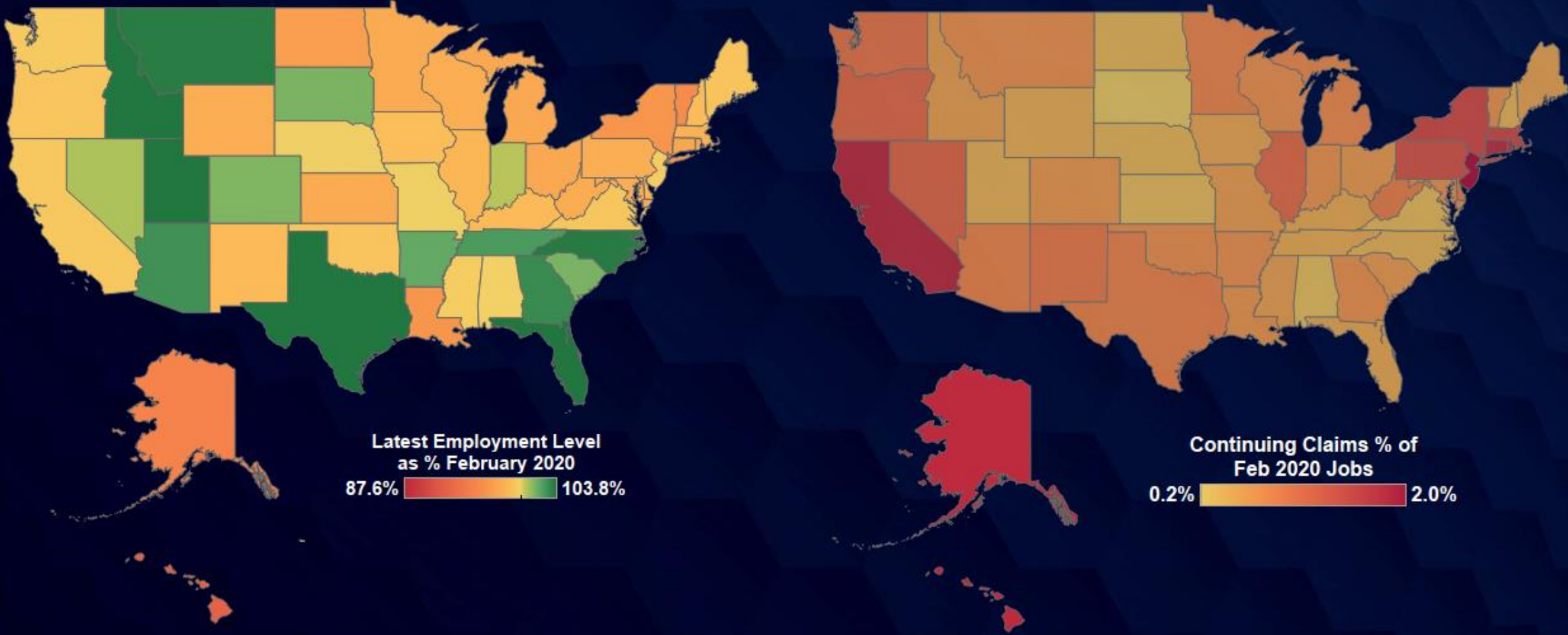
COX AUTOMOTIVE AUTO MARKET REPORT

Translating Data and Trends into Actionable Insights

Daily Case and Hospitalization Trends



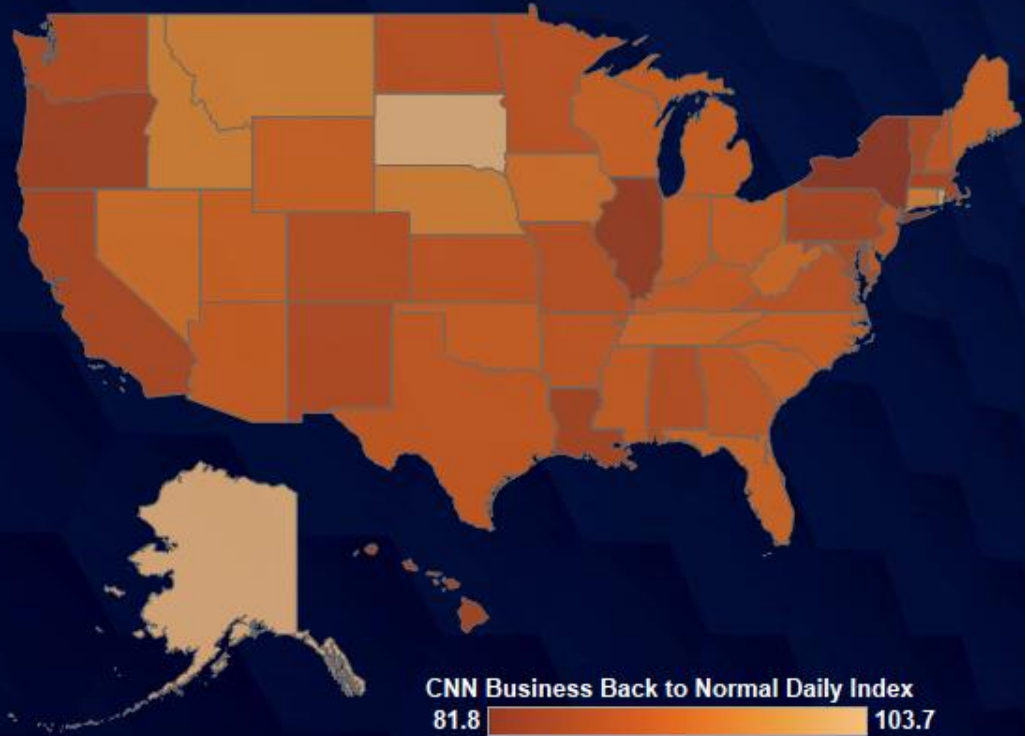
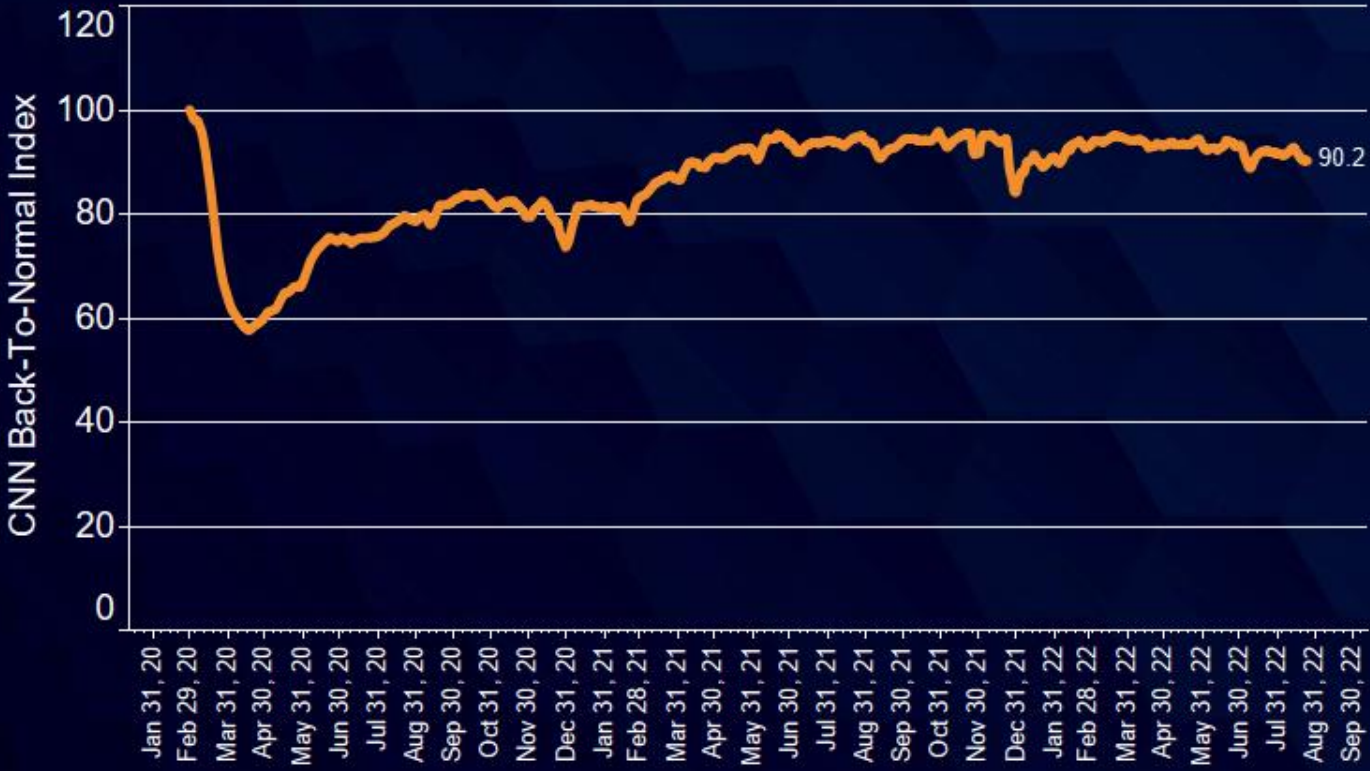
Continuing Claims at 1.42 Million Nationally



NOTE: Latest Employment Numbers for July 2022; Continuing Claims Unemployment Data for Week Ending August 6

Economic Activity Has Plateaued

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



CNN Business Back to Normal Daily Index
81.8 103.7

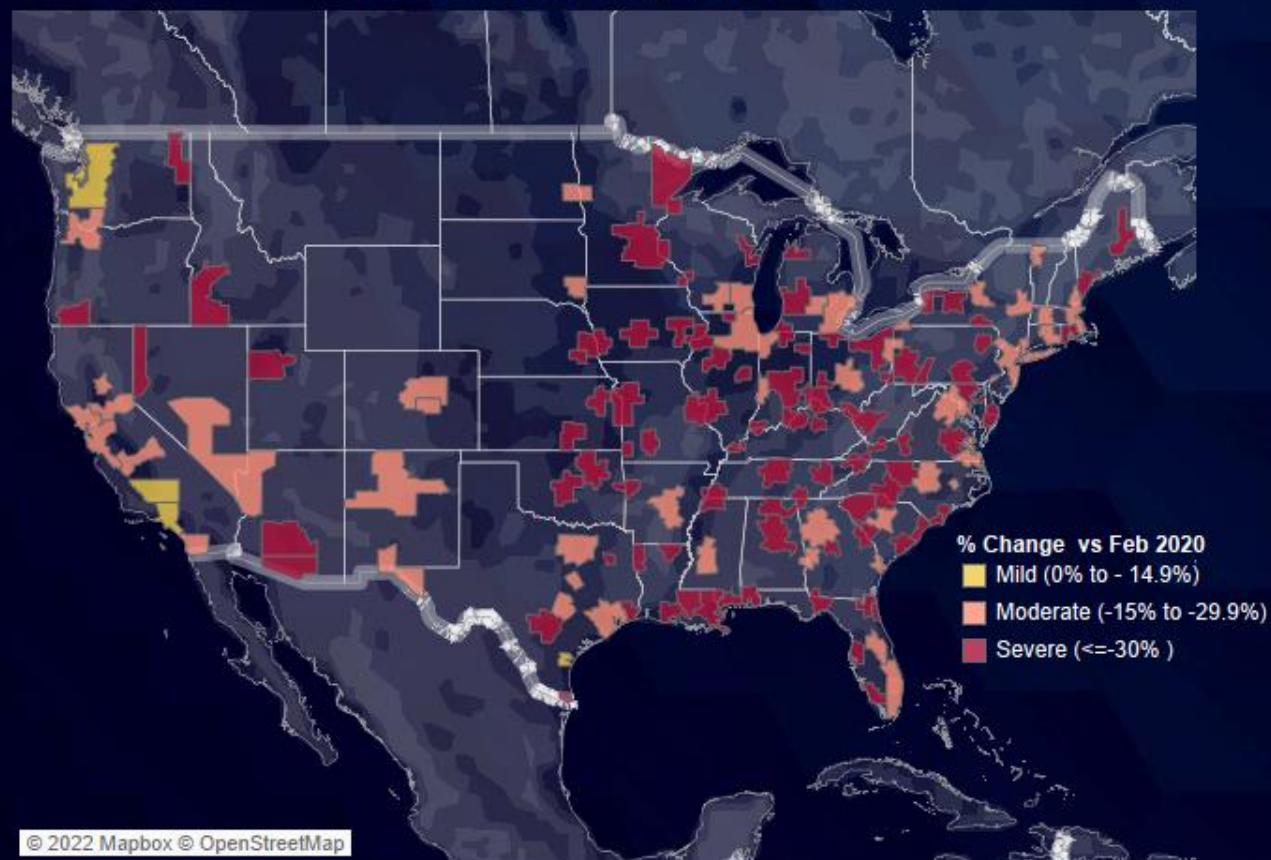
Consumer Sentiment Up from Low in Spring

The Index of Consumer Sentiment increased 3.3% in July and is up 4.7% so far in August

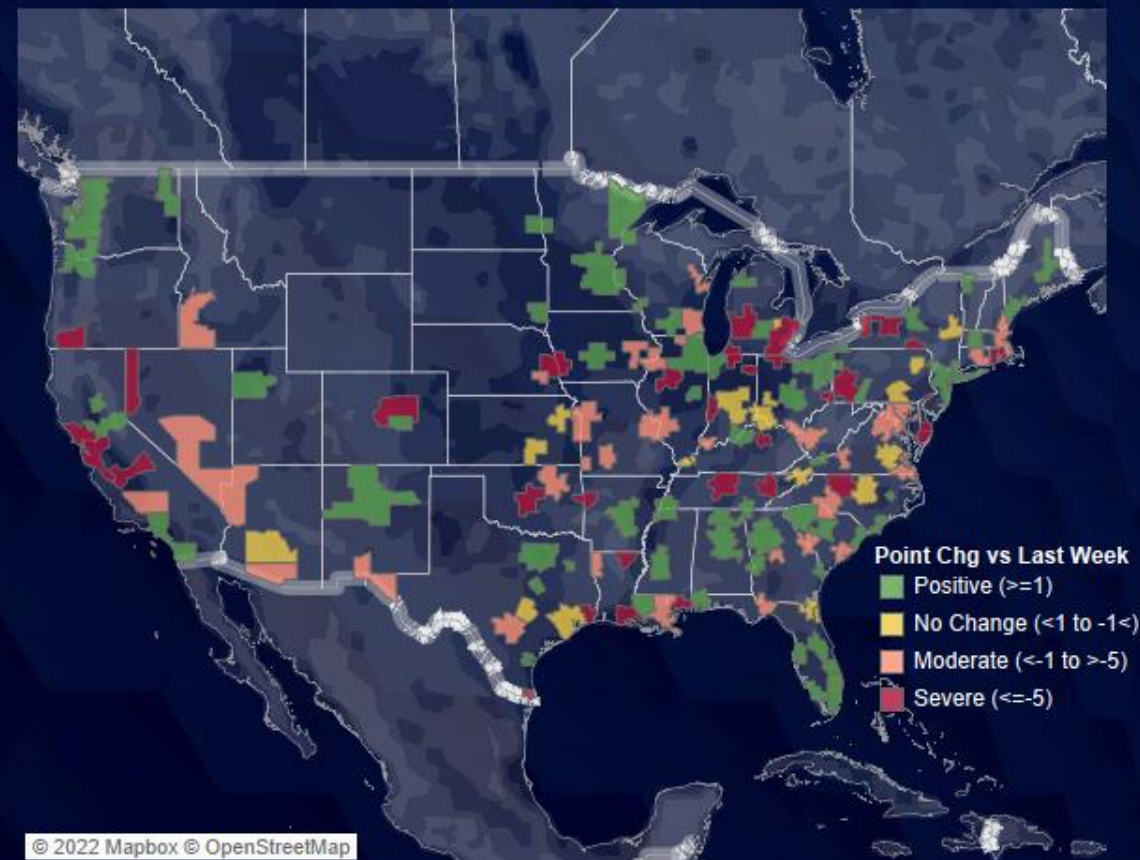


Sentiment Shifts Across Markets

Since February 29, 2020



Since August 22, 2022

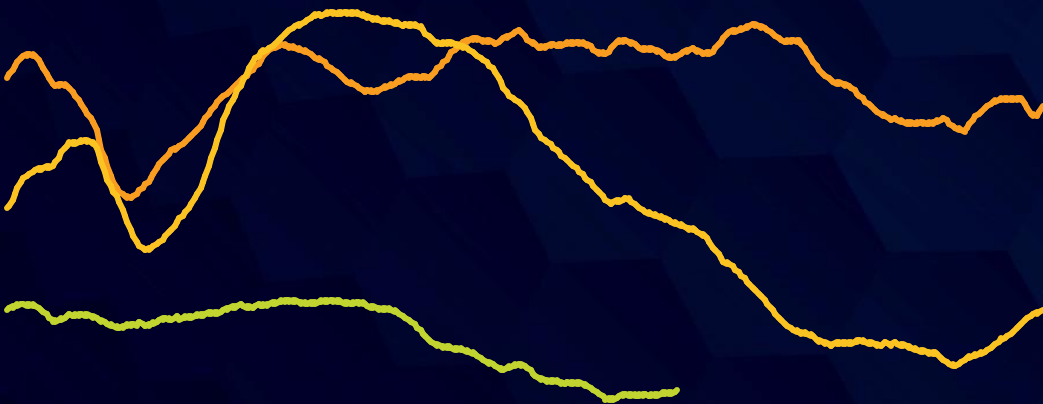


Retail Sales Estimates

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

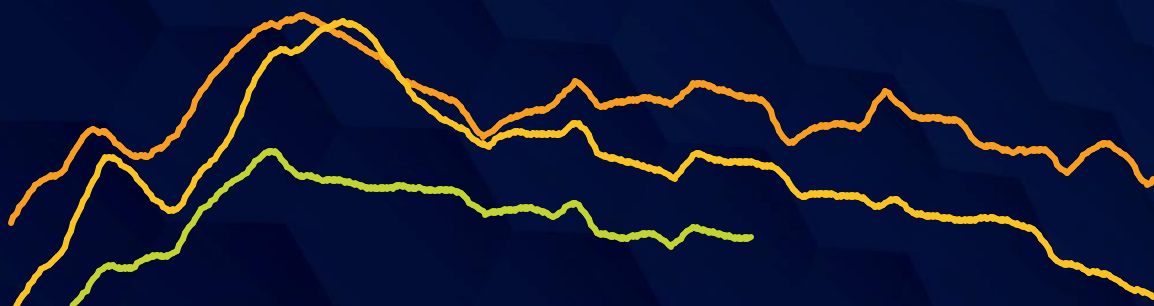
Dealertrack Retail New Sales

2019 2021 2022



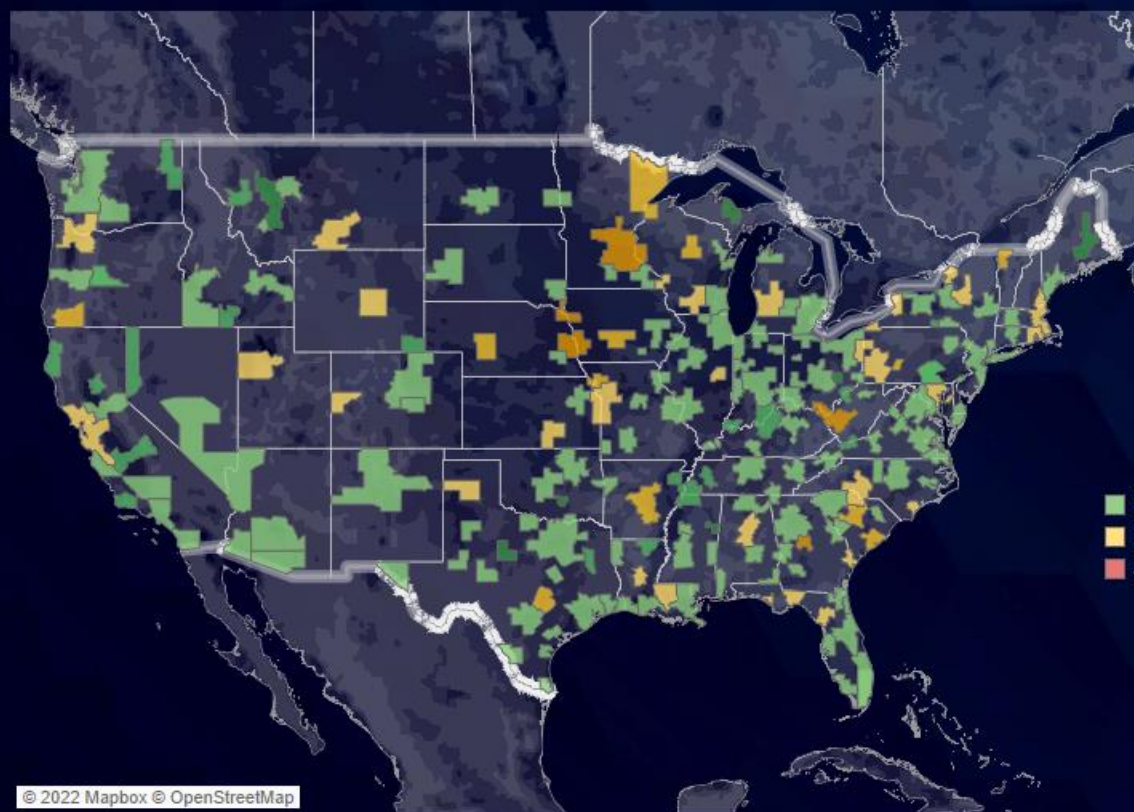
Dealertrack Retail Used Sales

2019 2021 2022

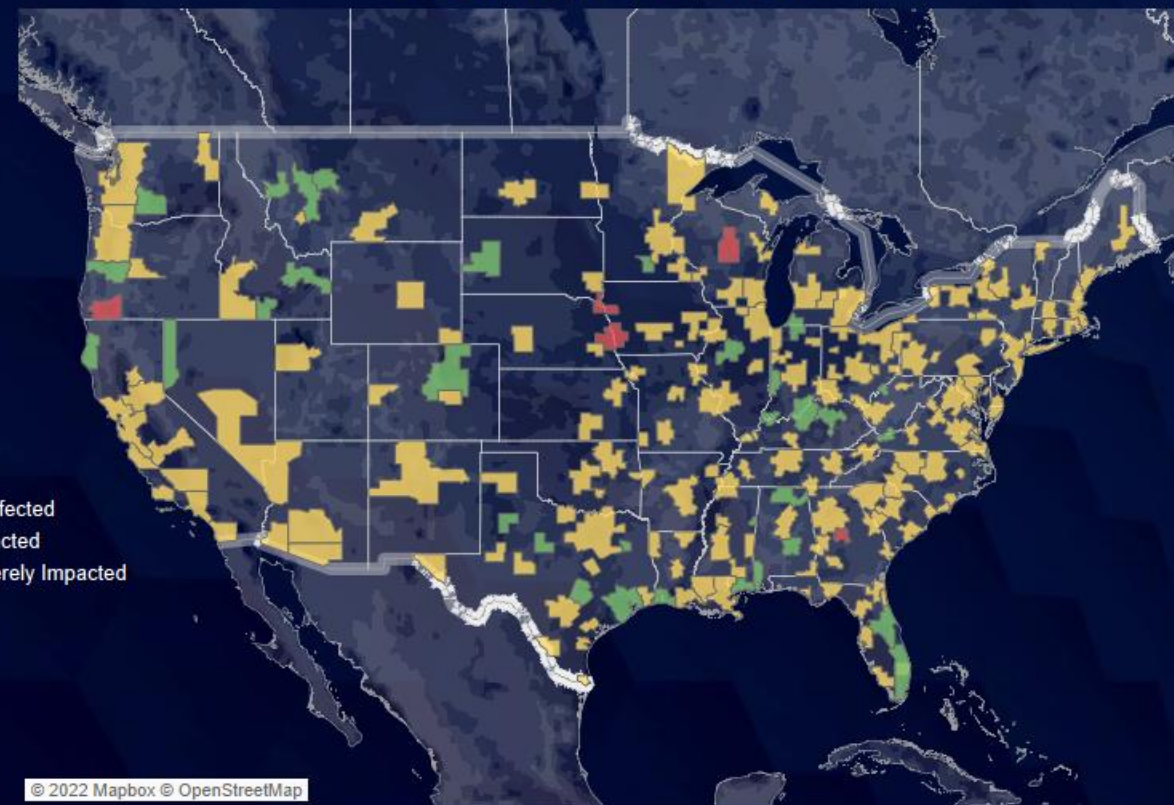


Sales Impact Varies by DMA

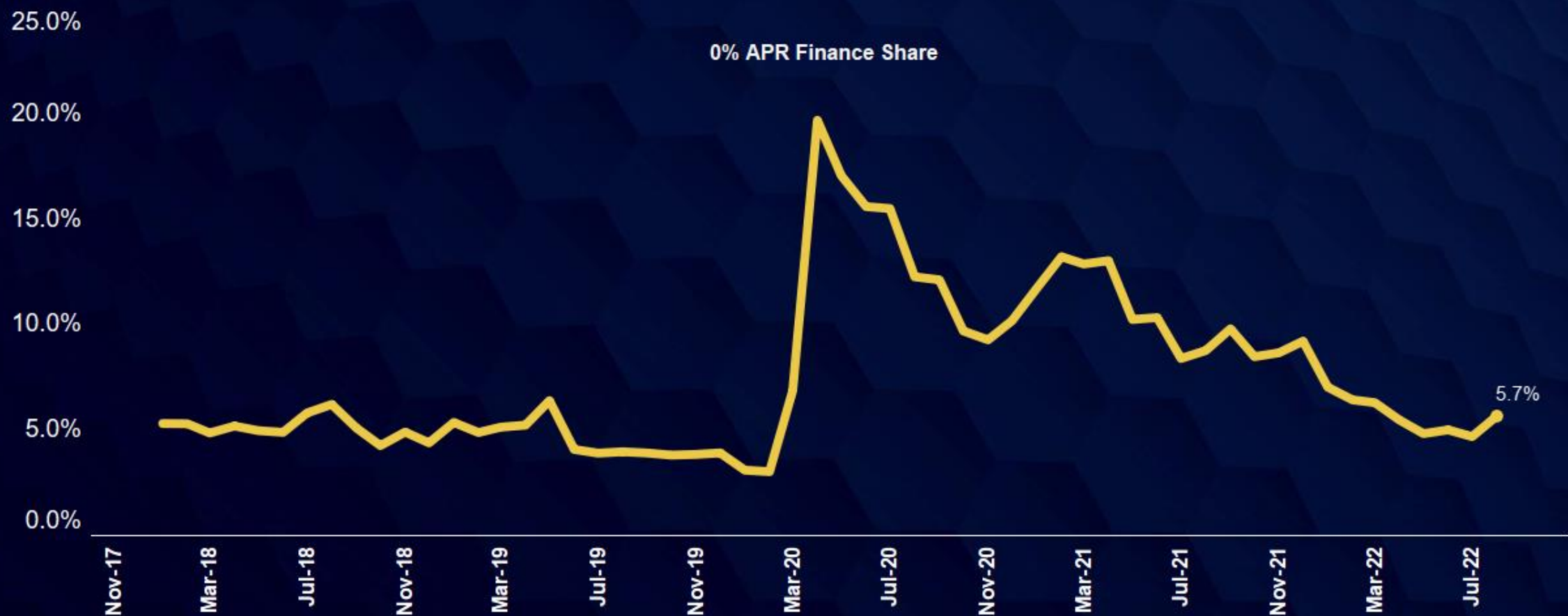
March 29, 2021 (vs same-week 2019)



Since August 22, 2022

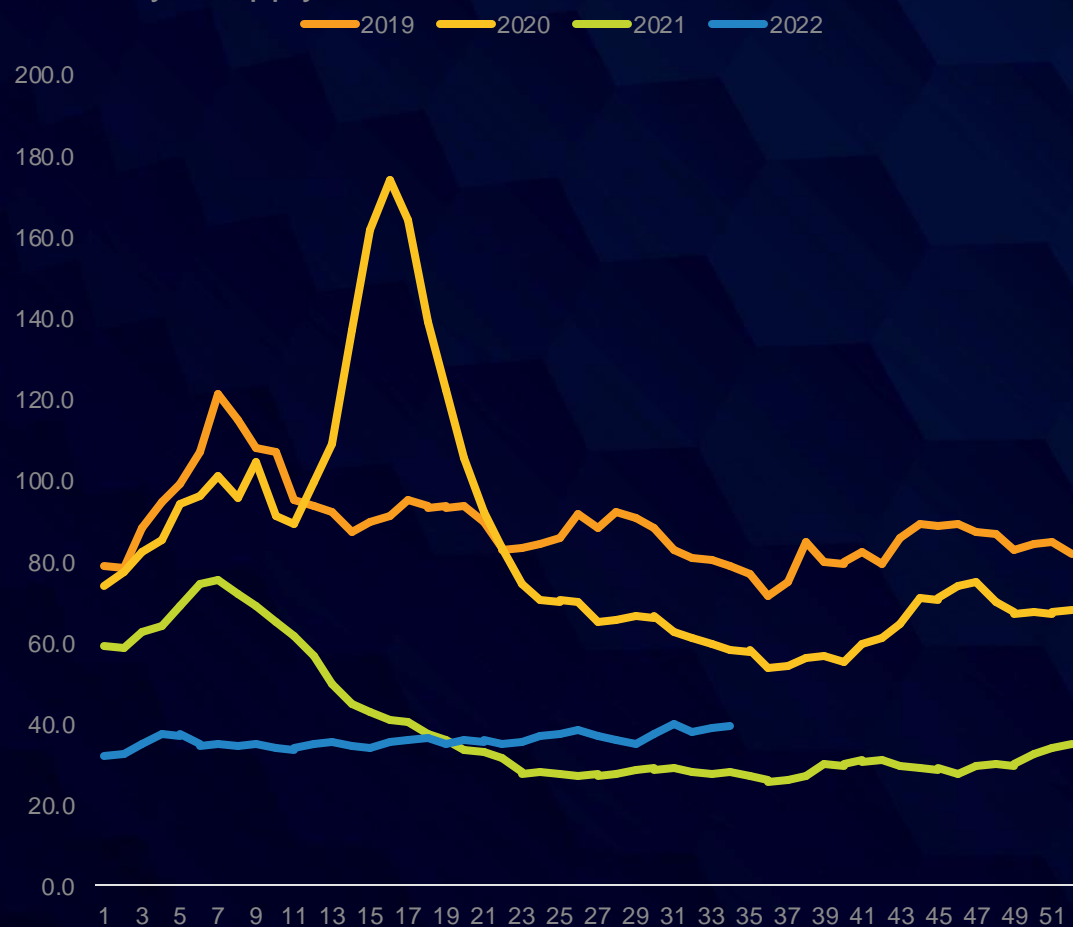


Zero Percent Financing



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

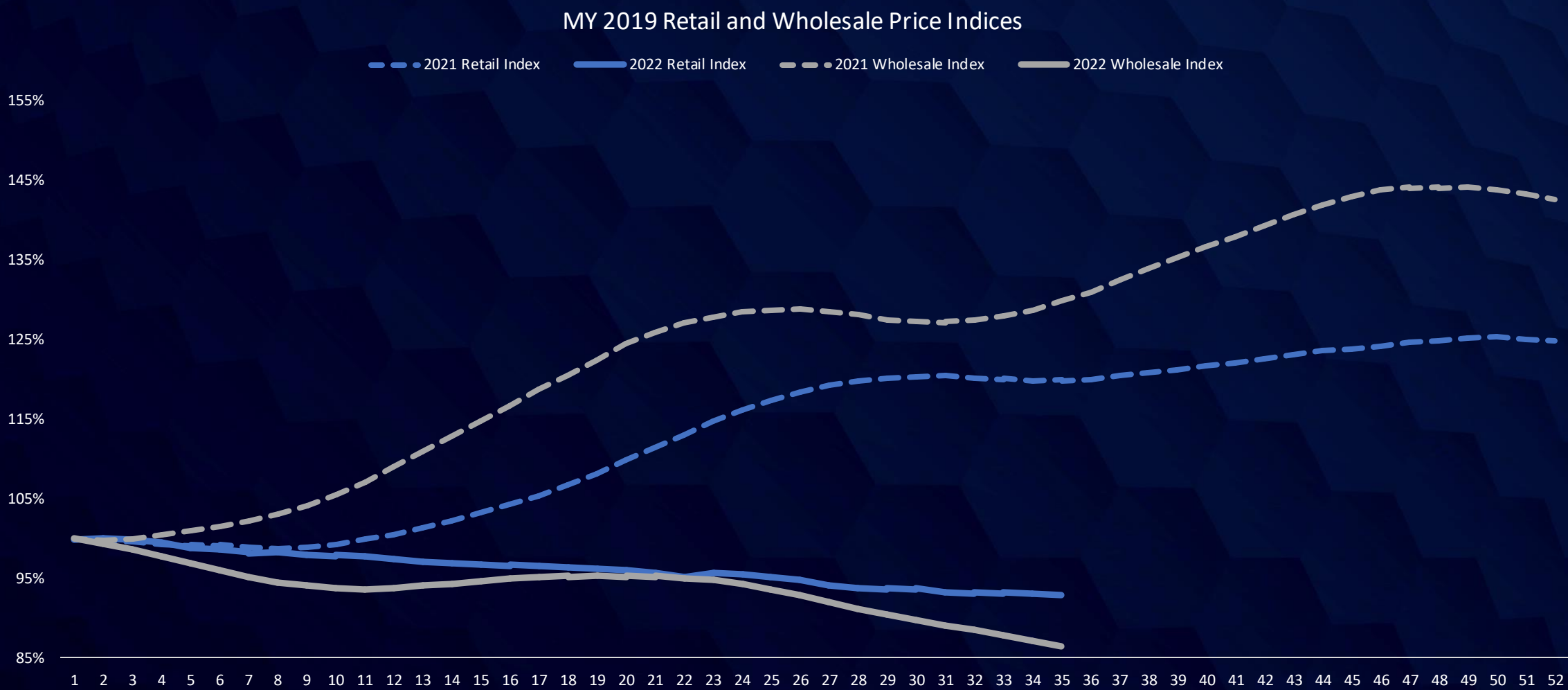
New Days' Supply



Used Days' Supply



Wholesale Used Prices Seeing Higher Than Normal Depreciation



Cox Automotive Leading Indicators

- Leads were down y/y in August on both Autotrader and Kelley Blue Book, but...
 - Visits and leads were up for the month compared to July on both sites
- Credit applications on Dealertrack stable w/w:
 - Unique applications on same-store basis last week were down 15% y/y with stable trend
- Service trends on Xtime relative to last year declined 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