

June 2023

# Market View

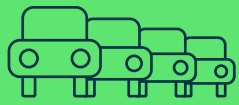
For the latest insights from eBay Motors Group.

Welcome to our monthly Market View. We've analysed activity across the eBay Motors Group to provide insights into stock, price, days to sell and demand by consumers based on what they are viewing, including: manufacturers, models and the increasing interest in electric and hybrid vehicles. We look at comparison time periods so that you can spot emerging trends on a month-by-month basis.



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# Stock

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## June 2023 at a glance

- Supply levels continued to be challenging in June with overall average stock volumes down -3.1% MoM and -5.9% YoY.
- Like-for-like dealers over the last year shows supermarkets up +0.7% YoY and independents/franchised down around -7% YoY.
- % share of petrol listings has increased MoM with alternative vehicles share down from 11% in May 23 to 9.9% in June 23 (up from 3.9% last year).

### Stock volume by dealership

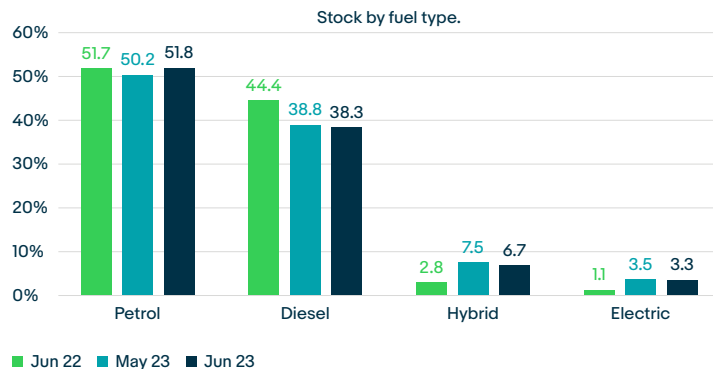
Supply levels continued to be challenging in June with overall average stock volumes down -3.1% MoM and -5.9% YoY.

# 53.6

May 23: 55.4    MoM: -3.1%  
 Jun 22: 57.0    YoY: -5.9%

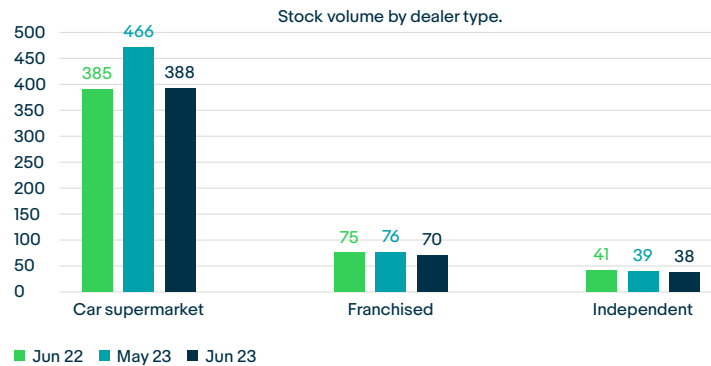
### Stock volume by fuel type

% share of petrol listings has increased MoM with alternative vehicles share down from 11% in May 23 to 9.9% in June 23 (up from 3.9% last year).



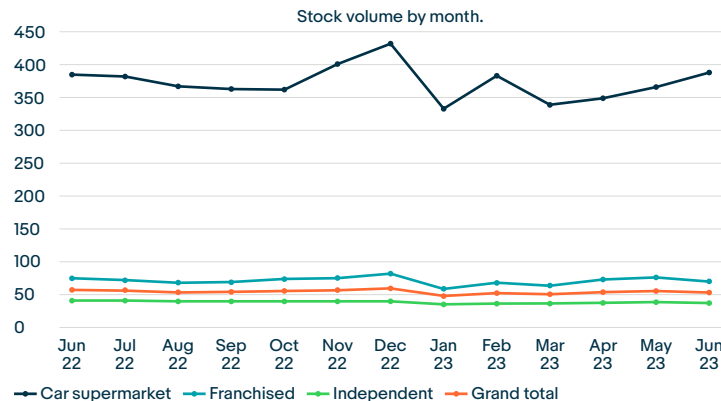
### Stock volume by dealer type

Like-for-like dealers over the last year shows supermarkets up +0.7% YoY and independents/franchised down around -7% YoY.



### Stock volume trend per dealership

Generally stock volumes have been relatively stable in recent months.



“Dealers saw welcome stability in demand in June but continued to battle with limited supply as stock levels dipped to 54 units, although supermarkets saw a welcome uplift.”

Lucy Tugby,  
Marketing Director, Motors.co.uk



# Price

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## June 2023 at a glance

- Generally, average used car prices have continued to edge down throughout 2023. They're down -0.8% MoM, down -3.3% from January 23 but up +10.1% YoY.
- Average price of vehicles over 10 years old has generally fallen over the last 12 months to £7,041. Younger vehicles have seen prices increase YoY but with little change during 2023.
- Average price for selected make/models (less than 30k miles and < 3 years old) saw Vauxhall Corsa, Ford Focus, Audi A3 and Range Rover Sport all fall by over -1% MoM. Only Honda Civic and BMW 3 Series saw an increase MoM.

### Average vehicle price

Generally, average used car prices have continued to edge down throughout 2023. They're down -0.8% MoM, down -3.3% from January 23 but up +10.1% YoY.

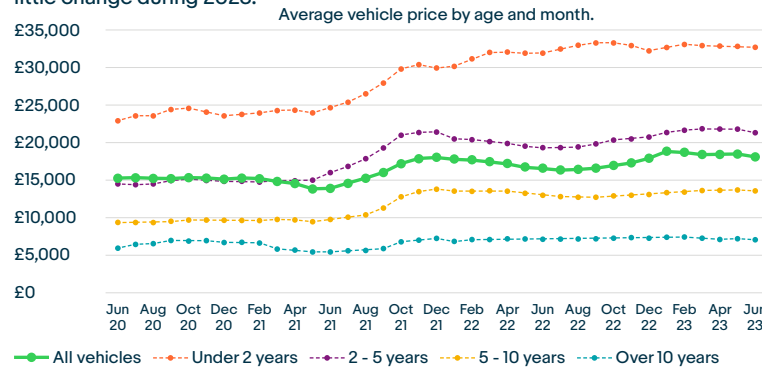
# £18,283

May 23: **£18,433** MoM: **-0.8%**

Jun 22: **£16,612** YoY: **+10.1%**

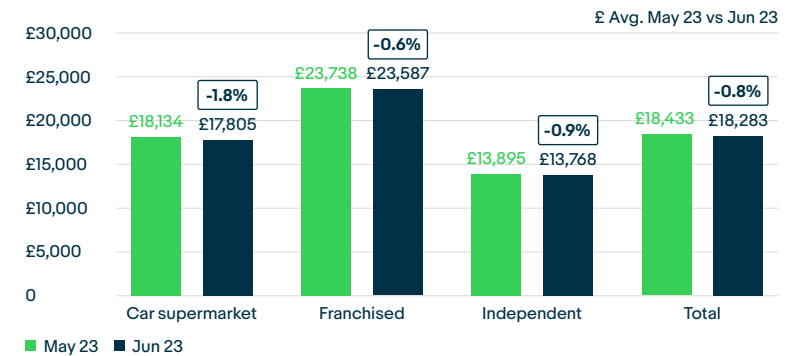
### Average listing price over time

Average price of vehicles over 10 years old has generally fallen over the last 12 months to £7,041. Younger vehicles have seen prices increase YoY but with little change during 2023.



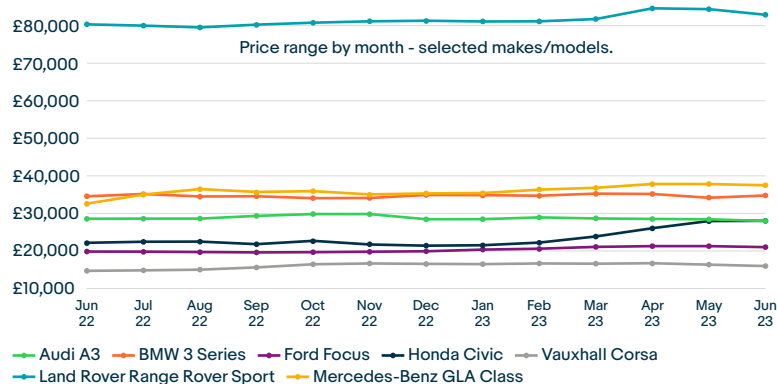
### Average price of vehicles on Motors.co.uk by dealer type

All dealer types saw the average price of stock decrease by around -1% MoM.



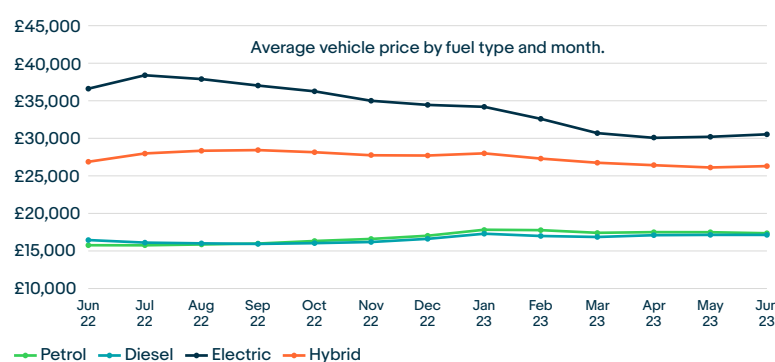
### Average price by month - selected makes/models

Average price for selected make/models (less than 30k miles and < 3 years old) saw Vauxhall Corsa, Ford Focus, Audi A3 and Range Rover Sport all fall by over -1% MoM. Only Honda Civic and BMW 3 Series saw an increase MoM.



### Average price by fuel type

Our new pricing analysis by fuel type shows some welcome stability for EVs which increased by 1% MoM to £30,341, against a YoY fall of 16% from £36,378.



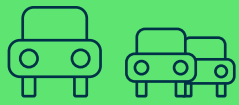
### Top 5 price movers

Top 5 make/models by MoM increase/decrease in price.

Increase						
Make	Model	Age band	Fuel type	Jun 23 stock	Jun 23 avg price	% change
Ford	KA	6 - 8 yrs	Petrol	121	£7,201	+7.9%
SEAT	Ibiza	6 - 8 yrs	Petrol	198	£8,968	+6.4%
Honda	Jazz	8 - 10 yrs	Petrol	144	£9,025	+5.4%
Renault	Clio	10 - 12 yrs	Petrol	120	£4,347	+4.6%
Peugeot	3008	6 - 8 yrs	Diesel	124	£11,134	+4.5%

Decrease						
Make	Model	Age band	Fuel type	Jun 23 stock	Jun 23 avg price	% change
Ford	Focus	12 - 14 yrs	Petrol	296	£7,806	-6.8%
Honda	Civic	12 - 14 yrs	Petrol	111	£4,848	-7.0%
Ford	Focus	14 - 16 yrs	Petrol	207	£3,510	-8.7%
Ford	Mondeo	10 - 12 yrs	Diesel	127	£4,798	-8.8%
Vauxhall	Corsa	12 - 14 yrs	Petrol	221	£3,461	-10.3%



# Demand

## June 2023 at a glance

- Overall average days to sell fell by -2.6% MoM as consumer demand remained relatively strong in June 23. Days to sell was also down -12.7% on June last year.
- Independent dealers saw a decrease in days to sell, down -1.2% MoM to 29.1 days with franchised dealers down -0.9% to 46.3 days.
- June 23 saw a continuation of stable days to sell from franchised and independent dealers with car supermarkets showing a marked decrease in the last few months.

### Average days to sell

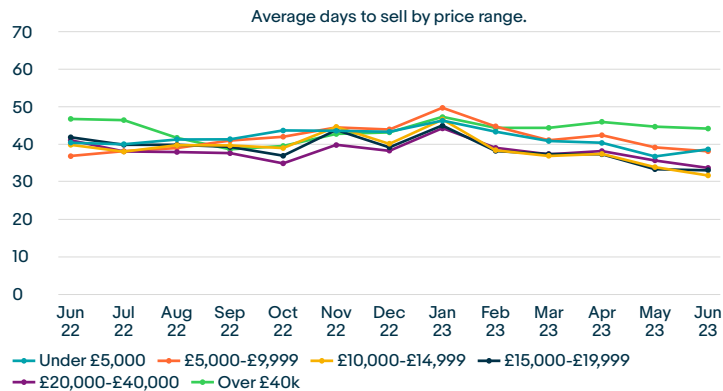
Overall average days to sell fell by -2.6% MoM as consumer demand remained relatively strong in June 23. Days to sell was also down -12.7% on June last year.

# 35.0

May 23: 36.0 MoM: -2.5%  
 Jun 22: 40.1 YoY: -12.7%

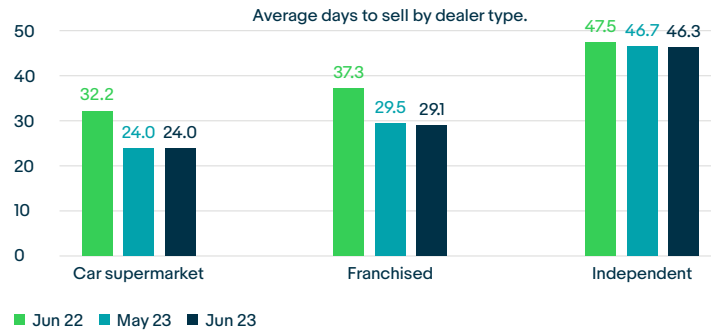
### Average days to sell by price

Days to sell decreased across all vehicle price ranges MoM, except for vehicles under £5,000.



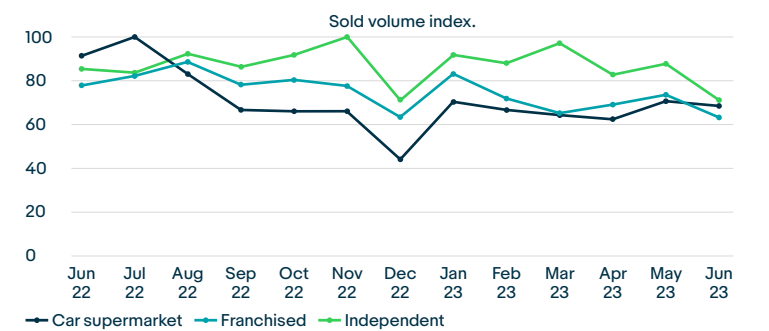
### Average days to sell by dealer type

Independent dealers saw a decrease in days to sell, down -1.2% MoM to 29.1 days with franchised dealers down -0.9% to 46.3 days.



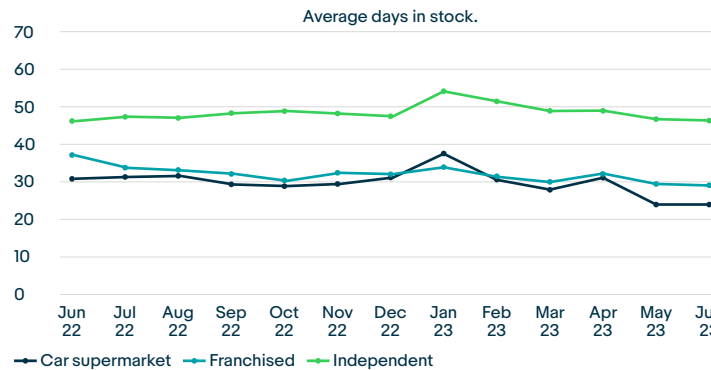
### Sold volume index by dealer type

Indexed volume of sold stock shows that absolute volumes are still a little below levels of last year.



### Average days in stock by dealer type

June 23 saw a continuation of stable days to sell from franchised and independent dealers with car supermarkets showing a marked decrease in the last few months.





# Demand

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## June 2023 at a glance

- Ford, VW and Vauxhall listings generate most vehicle views on eMG sites, with Peugeot, Toyota and Land Rover showing the largest MoM growth.
- Top 10 fastest selling vehicles in June 23 was dominated by younger, lower mileage, petrol vehicles, with Vauxhall's appearing 5 times in the top ten.
- Days to sell has fallen YoY for all fuel types, except electric vehicles which have slowed down in recent months.

## Top 10 most viewed manufacturers

Ford, VW and Vauxhall listings generate most vehicle views on eMG sites, with Peugeot, Toyota and Land Rover showing the largest MoM growth.

Rank	Manufacturer	Jun 22	May 23	Jun 23
1	Ford	12.3%	12.4%	12.2%
2	Volkswagen	9.1%	9.4%	9.3%
3	Vauxhall	7.6%	7.3%	7.3%
4	BMW	7.5%	7.4%	7.2%
5	Audi	7.2%	7.3%	7.2%
6	Mercedes-Benz	6.9%	6.5%	6.3%
7	Nissan	4.1%	4.2%	4.2%
8	Peugeot	3.8%	3.8%	3.9%
9	Toyota	3.9%	3.7%	3.8%
10	Land Rover	3.5%	3.5%	3.6%

## Vehicle listings, days to sell and ad views by body style

Medium vehicle sector listings accounted for more than 39% of total listings and 36% of ad views, selling in an average of 31.4 days.

Vehicle sector	% of listings		Avg days to sell		% of ad views	
	Jun 22	Jun 23	Jun 22	Jun 23	Jun 22	Jun 23
Medium	43.5%	39.0%	38.9	31.4	37.1%	35.8%
Small/Supermini	22.3%	23.4%	39.3	33.0	20.3%	21.0%
Prestige	17.1%	16.1%	40.8	36.0	20.1%	18.2%
Large	5.2%	5.7%	46.1	41.5	6.2%	6.8%
MPV	5.1%	8.7%	39.4	42.1	6.4%	8.4%
Estate	4.0%	4.6%	39.4	37.8	5.2%	5.0%
Convertible	2.8%	2.5%	52.0	49.1	4.6%	4.8%
Grand Total	100%	100%	40.1	35.0	100%	100%



## Top 10 fastest selling makes/models

Top 10 fastest selling vehicles in June 23 was dominated by younger, lower mileage, petrol vehicles, with Vauxhall's appearing 5 times in the top ten.

Rank	Make	Model	Age band	Fuel type	Mileage	Avg days to sell
1	Vauxhall	Corsa	1 - 2 yrs	Petrol	10 - 20k	6.9
2	Vauxhall	Grandland X	3 - 4 yrs	Petrol	10 - 20k	9.1
3	SEAT	Ibiza	3 - 4 yrs	Petrol	10 - 20k	9.2
=4	Vauxhall	Mokka	1 - 2 yrs	Petrol	10 - 20k	9.9
=4	Renault	Trafic	Under 6 mths	Diesel	Under 5k	9.9
5	Vauxhall	Mokka	1 - 2 yrs	Petrol	5 - 10k	11.2
6	SEAT	Arosa	2 - 3 yrs	Petrol	10 - 20k	11.3
=7	SEAT	Ibiza	3 - 4 yrs	Petrol	20 - 30k	11.4
=7	Vauxhall	Corsa	1 - 2 yrs	Petrol	5k - 10k	11.4
8	Audi	A4	2 - 3 yrs	Petrol	20 - 30k	11.6

## Vehicle listings, days to sell and ad views by age

Due to stock supply issues, listings have generally aged overall on Motors.co.uk compared to last year. 55% of DPVs are generated for vehicles of 6 - 14 years old.

Age	% of listings		Avg days to sell		% of ad views	
	Jun 22	Jun 23	Jun 22	Jun 23	Jun 22	Jun 23
Under 6 mths	1.5%	2.9%	27.8	30.8	1.1%	1.1%
6 mths - 1 yr	2.3%	2.8%	41.4	40.7	1.4%	1.1%
1 - 2 yrs	6.1%	5.8%	41.6	37.5	3.6%	2.1%
2 - 3 yrs	9.8%	8.8%	42.5	32.6	3.9%	3.5%
3 - 4 yrs	19.4%	14.3%	41.6	31.8	7.4%	5.2%
4 - 5 yrs	13.9%	11.9%	42.7	31.3	7.4%	6.4%
5 - 6 yrs	9.9%	8.5%	37.7	31.5	7.3%	6.7%
6 - 8 yrs	13.3%	13.3%	35.5	32.0	14.6%	14.9%
8 - 10 yrs	8.4%	11.4%	36.0	37.9	13.7%	16.2%
10 - 12 yrs	5.8%	7.9%	39.8	41.1	12.2%	13.3%
12 - 14 yrs	4.1%	5.3%	43.4	42.1	10.2%	10.8%
14 - 16 yrs	2.8%	3.2%	46.6	45.0	8.1%	7.8%
16 - 18 yrs	1.3%	1.8%	44.5	48.0	4.3%	5.0%
18 - 20 yrs	0.6%	0.9%	46.6	55.2	2.2%	2.9%
Over 20 yrs	0.8%	1.1%	70.9	76.4	2.7%	3.1%
Grand Total	100%	100%	40.1	35.0	100%	100%

## Vehicle listings, days to sell and ad views by fuel type

Days to sell has fallen YoY for all fuel types, except electric vehicles which have slowed down in recent months.

Fuel type	% of listings		Avg days to sell		% of ad views	
	Jun 22	Jun 23	Jun 22	Jun 23	Jun 22	Jun 23
Petrol	51.7%	51.8%	40.0	33.5	52.5%	52.2%
Diesel	44.4%	38.3%	40.7	36.5	43.4%	43.9%
Hybrid	2.8%	6.7%	37.4	34.4	3.0%	2.9%
Electric	1.1%	3.3%	35.4	44.5	1.1%	1.0%
Grand Total	100%	100%	40.1	35.0	100%	100%



# Electric/hybrid

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## June 2023 at a glance

- The Audi Q8 and DS Automobiles DS 3 were the fastest selling electric vehicles in June 23, both selling on average in under 15 days.
- Peugeot 408, VW Arteon and Hyundai Santa Fe were the fastest selling hybrids in June 23, all selling in under 10 days.
- Petrol vehicles accounted for 52% of all listings in June 23 with alternative fuel vehicles accounting for 10%.

### Electric, sold >10

The Audi Q8 and DS Automobiles DS 3 were the fastest selling electric vehicles in June 23, both selling on average in under 15 days.

Rank	Make	Model	Days to sell
1	Audi	Q8	14.2
2	DS Automobiles	DS 3	14.3
3	Volvo	XC40	15.1
4	Volkswagen	UP!	19.1
5	Tesla	Model 3	21.1
6	Cupra	Born	23.3
7	smart	ForTwo Coupe	25.7
8	Ford	E Transit	26.2
9	Audi	RS E-Tron	26.5
10	Peugeot	2008	27.1

### Hybrid, sold >10

Peugeot 408, VW Arteon and Hyundai Santa Fe were the fastest selling hybrids in June 23, all selling in under 10 days.

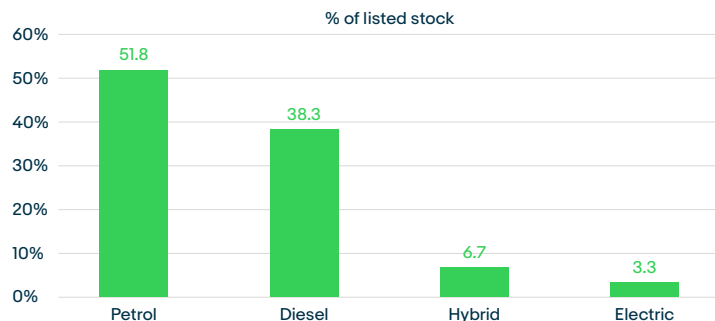
Rank	Make	Model	Days to sell
1	Peugeot	408	8.0
2	Volkswagen	Arteon	8.5
3	Hyundai	Santa FE	9.5
4	Volvo	V90	11.0
5	Jaguar	E-Pace	13.0
=6	Ford	Focus	14.0
=6	Nissan	Juke	14.0
7	Volkswagen	Multivan	14.5
8	Toyota	Highlander	14.6
9	Lexus	LC 500	15.0

“Alternative fuel stocking dipped month-on-month in June with EVs dropping 4% and hybrids down 7%, nudging their overall market share down from 11% to 10%.”

Lucy Tugby,  
Marketing Director, Motors.co.uk

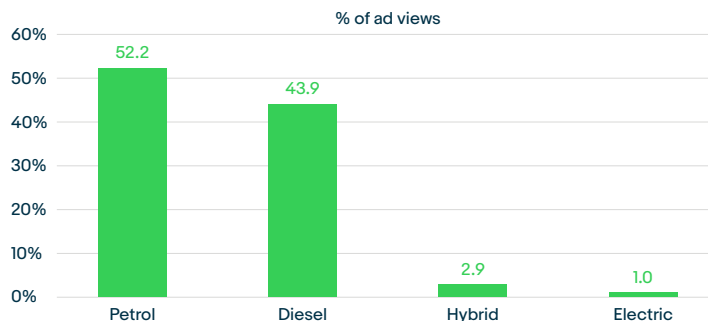
### Vehicle listings by fuel type

Petrol vehicles accounted for 52% of all listings in June 23 with alternative fuel vehicles accounting for 10%.



### Ad views by fuel type

Petrol vehicles accounted for 52% of all ad views in June 23 with alternative fuel vehicles accounting for 3.9%.





# Electric/hybrid

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## June 2023 at a glance

- Younger, lower mileage electric vehicles saw some prices rise as much as +20% MoM in June 23 with the Peugeot 208 in high demand.
- Nearly new Hybrid Tucson and BMW 2 Series saw the biggest MoM increase in price, up +11.5% and +9.7% respectively.
- Indexed vehicle views show that interest in electric and hybrid vehicles has increased in recent months with growth in vehicle views as a share of total.

### Top 5 price movers - Electric

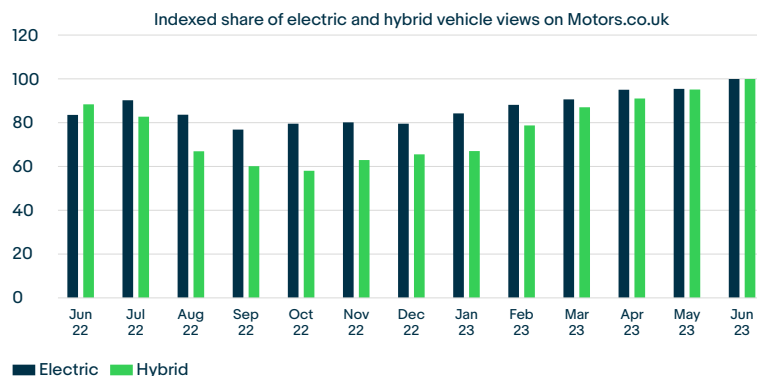
Younger, lower mileage electric vehicles saw some prices rise as much as +20% MoM in June 23 with the Peugeot 208 in high demand.

Increase					
Make	Model	Age band	Mileage	Avg price	% change
Peugeot	208	2 - 3 yrs	20 - 30k	£22,865	+20.3%
Renault	Zoe	Under 6 mths	Under 5k	£26,191	+14.6%
BMW	i4	Under 6 mths	Under 5k	£68,232	+14.6%
Hyundai	Ioniq	6 mths - 1 yr	Under 5k	£22,442	+12.7%
Audi	E-Tron	6 mths - 1 yr	5 - 10k	£54,880	+8.7%

Decrease					
Make	Model	Age band	Mileage	Avg price	% change
Skoda	Enyaq	1 - 2 yrs	20 - 30k	£32,274	-10.6%
Nissan	Leaf	5 - 6 yrs	10 - 20k	£13,273	-11.2%
Kia	Niro	1 - 2 yrs	Under 5k	£24,914	-11.5%
Renault	Zoe	1 - 2 yrs	Under 5k	£18,165	-12.9%
Mercedes-Benz	EQA	6 mths - 1 yr	Under 5k	£49,777	-15.0%

### Vehicle views over time by fuel type

Indexed vehicle views show that interest in electric and hybrid vehicles has increased in recent months with growth in vehicle views as a share of total.



### Top 5 price movers - Hybrid

Nearly new Hybrid Tucson and BMW 2 Series saw the biggest MoM increase in price, up +11.5% and +9.7% respectively.

Increase					
Make	Model	Age band	Mileage	Avg price	% change
Hyundai	Tucson	Under 6 mths	5 - 10k	£37,036	+11.5%
BMW	2 Series	6 mths - 1 yr	Under 5k	£34,759	+9.7%
Kia	Sportage	2 - 3 yrs	30 - 40k	£21,491	+9.0%
Mercedes-Benz	E Class	2 - 3 yrs	40 - 50k	£37,803	+8.6%
Hyundai	Ioniq	5 - 6 yrs	80 - 100k	£14,418	+8.3%

Decrease					
Make	Model	Age band	Mileage	Avg price	% change
Mitsubishi	Outlander	2 - 3 yrs	20 - 30k	£21,808	-10.5%
Toyota	Prius	1 - 2 yrs	30 - 40k	£23,627	-11.8%
Toyota	Auris	6 - 8 yrs	100 - 120k	£10,824	-11.8%
Mercedes-Benz	GLA Class	Under 6 mths	Under 5k	£49,422	-16.2%
Hyundai	Kona	1 - 2 yrs	30 - 40k	£18,968	-16.9%

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#### About us

eBay Motors Group is an advertising ecosystem that helps automotive retailers reach in-market buyers and sell cars fast.

Bringing together the reach of three of the UK's leading automotive sites – Motors.co.uk, eBay Motors and Gumtree Motors – eBay Motors Group connects dealers with millions of buyers across the digital car search journey.

Retailers enjoy the simplicity of a single upload, one point of contact and access to a stock management and response reporting centre, ensuring that it is a time-efficient and value-packed way to advertise.

Since December 2021, eBay Motors Group has been owned by O<sub>3</sub> and Novum Capital.