Parts & Service supply analysis

Brand, non-brand and make

As of March 20, 2020
Key takeaways Parts & Service supply trends

- All-up Parts & Service search volume is down 10.4% on the year but modestly up 3.1% year to date (YTD)

- Based on YTD growth, opportunity query categories are non-brand, Sedans, and Luxury Makes

- Declining YTD categories include brand queries and SUVs, Trucks, and Economy Makes

- March search results page view (SRPV) and click declines have occurred across brand/non-brand, vehicle segment and vehicle class, signaling prospective weakening as fewer vehicles are on the road

Parts & Service (P&S) SRPVs are down 10.4% year over year (YoY) but modestly up 3.1% YTD

- YTD 2020: 3.1%
- YTD YoY: -10.4%
- This week YoY: -12.1%

Parts & Service clicks are down 14.3% YoY and 7.9% YTD

- YTD 2020: 7.9%
- YTD YoY: -14.3%
- This week YoY: -20.0%

Queries for Gas, Car Washes, Oil, Interior Car Parts, Services and Cleaning are up YoY

% YoY change in SRPVs for Weeks 9, 10 and 11

<table>
<thead>
<tr>
<th>Category</th>
<th>YoY Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>gas</td>
<td>35.6%</td>
</tr>
<tr>
<td>car wash</td>
<td>14.7%</td>
</tr>
<tr>
<td>oil</td>
<td>12.4%</td>
</tr>
<tr>
<td>interior/seats</td>
<td>8.8%</td>
</tr>
<tr>
<td>service</td>
<td>5.2%</td>
</tr>
<tr>
<td>air/clean</td>
<td>1.6%</td>
</tr>
<tr>
<td>battery</td>
<td>0.0%</td>
</tr>
<tr>
<td>engine</td>
<td>-2.9%</td>
</tr>
<tr>
<td>tire</td>
<td>-6.8%</td>
</tr>
<tr>
<td>electronics</td>
<td>-8.0%</td>
</tr>
<tr>
<td>accessory</td>
<td>-11.4%</td>
</tr>
<tr>
<td>mechanics</td>
<td>-12.4%</td>
</tr>
<tr>
<td>general parts</td>
<td>-12.4%</td>
</tr>
<tr>
<td>rims &amp; wheels</td>
<td>-14.2%</td>
</tr>
<tr>
<td>exterior body</td>
<td>-20.0%</td>
</tr>
<tr>
<td>lights</td>
<td>-22.5%</td>
</tr>
<tr>
<td>audio</td>
<td>-28.1%</td>
</tr>
<tr>
<td>car covers</td>
<td>-29.4%</td>
</tr>
<tr>
<td>floor mats</td>
<td>-32.3%</td>
</tr>
<tr>
<td>security/key</td>
<td>-38.6%</td>
</tr>
</tbody>
</table>

Clicks were down in March for all Parts & Services categories except Electronics and Gas

% YoY Change in clicks for Weeks 9, 10 and 11


Opportunities exist where SRPVs are up, but clicks are down. Consider tailoring ad copy.
89% of SRPVs and 64% of clicks for Parts & Service are non-brand/non-retailer related

Brand and non-brand distribution by SRPVs and clicks for 2020 YTD

<table>
<thead>
<tr>
<th></th>
<th>2020 YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRPVs</td>
<td></td>
</tr>
<tr>
<td>Non-Brand</td>
<td>89.0%</td>
</tr>
<tr>
<td>Brand</td>
<td>11.0%</td>
</tr>
<tr>
<td>Clicks</td>
<td></td>
</tr>
<tr>
<td>Non-Brand</td>
<td>63.8%</td>
</tr>
<tr>
<td>Brand</td>
<td>36.2%</td>
</tr>
</tbody>
</table>

Sample non-brand queries
- gas stations near me
- headlights
- car batteries
- rims and wheels
- oil change
- truck bed covers

Brand SRPVs and clicks are down YoY; moreover, the YTD click growth has materially fallen off in the past week.

- **YTD, 2020:** 5.0%
- **YTD, YoY:** -21.9%
- **This week, YoY:** -22.8%

- **YTD, 2020:** 12.6%
- **YTD, YoY:** -9.7%
- **This week, YoY:** -20.6%

Non-brand SRPVs and clicks are down YoY but SRPVs are seeing modest 4.1% gains YTD

- **Non-brand P&S SRPVs**
  - YTD, 2020: 4.1%
  - YTD, YoY: -8.7%
  - This week, YoY: -10.6%

- **Non-brand P&S clicks**
  - YTD, 2020: 5.3%
  - YTD, YoY: -16.7%
  - This week, YoY: -19.6%

SUV SRPVs and clicks are trending down, both YoY and YTD

• YTD, 2020: -12.1%
• YTD, YoY: -9.8%
• This week, YoY: -19.0%

• YTD, 2020: -15.2%
• YTD, YoY: -7.6%
• This week, YoY: -21.3%

SUV includes Brand and Non-Brand queries
Truck SRPVs and clicks are trending down both YoY and YTD

- YTD, 2020: -14.1%
- YTD, YoY: -16.0%
- This week, YoY: -13.4%

- YTD, 2020: -22.4%
- YTD, YoY: -21.0%
- This week, YoY: -17.6%


Truck includes Brand and Non-Brand queries
Car SRPVs are trending down YoY while clicks have closed in on a YoY gap, and both SRPVs and clicks are trending up YTD

Car includes Brand and Non-Brand queries
Parts & Service searches and clicks for Economy Makes are trending down YoY and YTD

- YTD, 2020: -6.3%
- YTD, YoY: -10.1%
- This week, YoY: -11.6%

- YTD, 2020: -14.7%
- YTD, YoY: -9.5%
- This week, YoY: -14.9%

Parts & Service searches and clicks for Luxury Makes are down YoY, while SRPVs are modestly up, and clicks are flat, YTD

- **Luxury P&S SRPVs**
  - YTD, 2020: 5.5%
  - YTD, YoY: -18.4%
  - This week, YoY: -17.4%

- **Luxury P&S clicks**
  - YTD, 2020: 0.7%
  - YTD, YoY: -20.9%
  - This week, YoY: -20.5%

Closing thoughts for your consideration

• Some Parts & Service retailers are offering assistance programs during this unprecedented time. One advertiser, for example, is offering remote pick-up and delivery for vehicles that need to be serviced, ensuring those who need to be mobile can remain so.

• Consider tailored ad-copy to communicate similar messages to shoppers efficiently

• The current situation may result in disrupted supply chains for auto parts, so help consumers understand their options, and what’s available or back-ordered