

J.D. POWER

US Automotive Market Outlook

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J.D. Power Data & Analytics

AFS 2023

ALG

**AUTODATA
SOLUTIONS**

CHROMEDATA

DARWIN

HELIX

PIN+

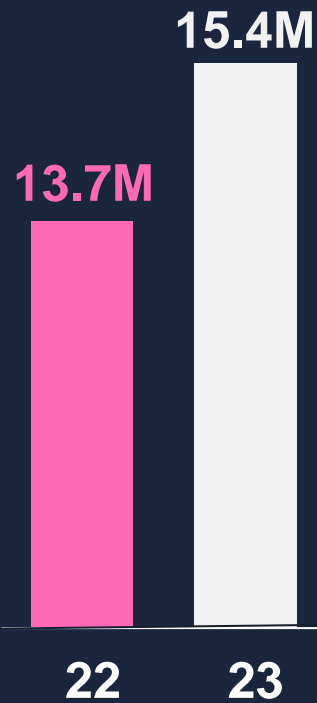
SMARTDIGITAL

UNITYWORKS

**VALUATION
SERVICES**

VANTAGE

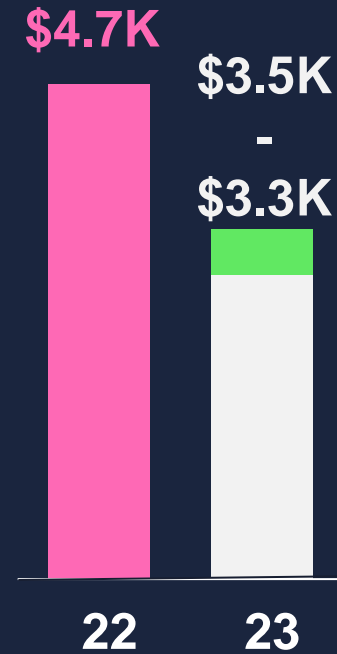
Total Sales



Incentives /Unit

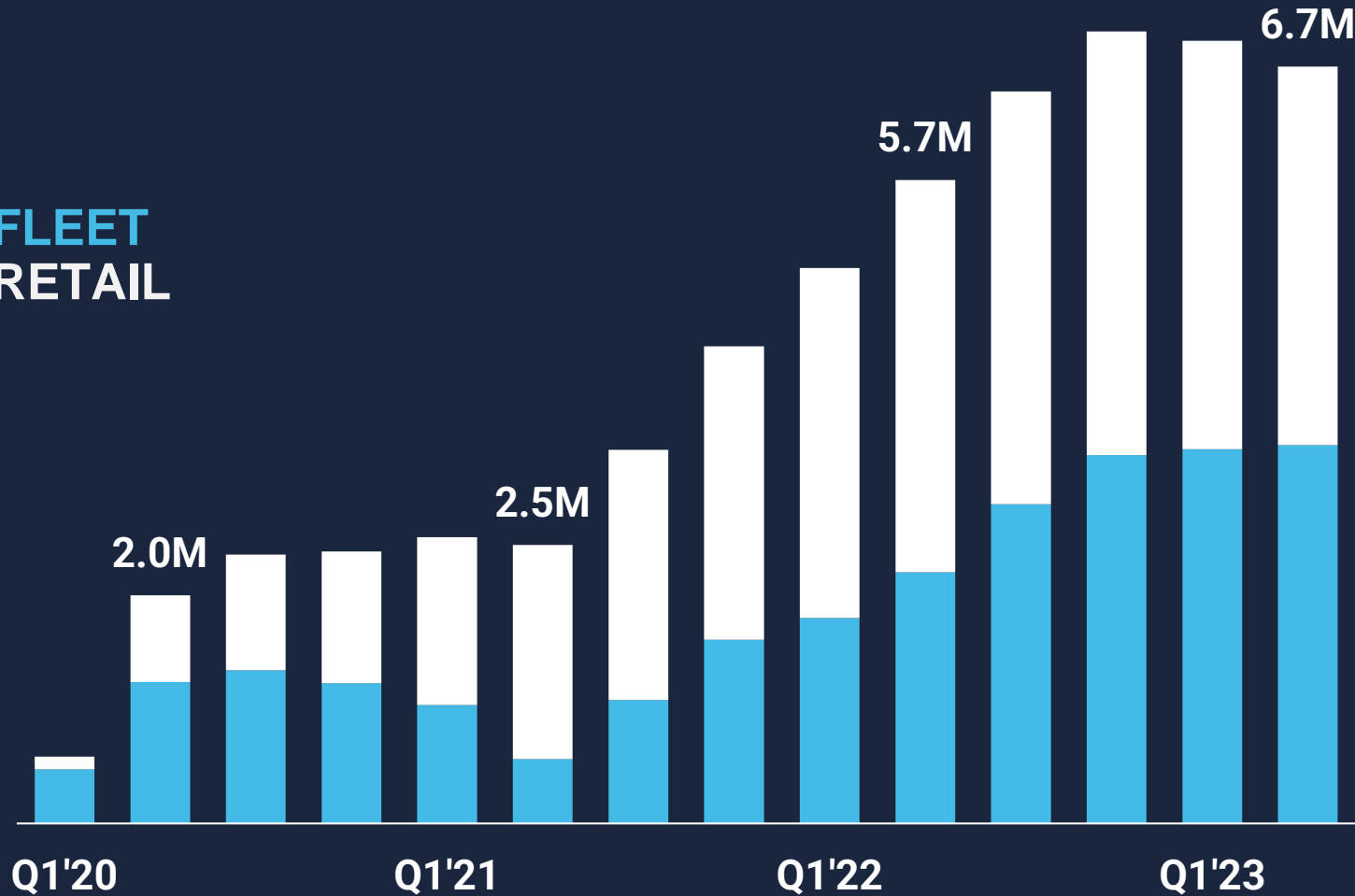


Dealer Gross+F&I

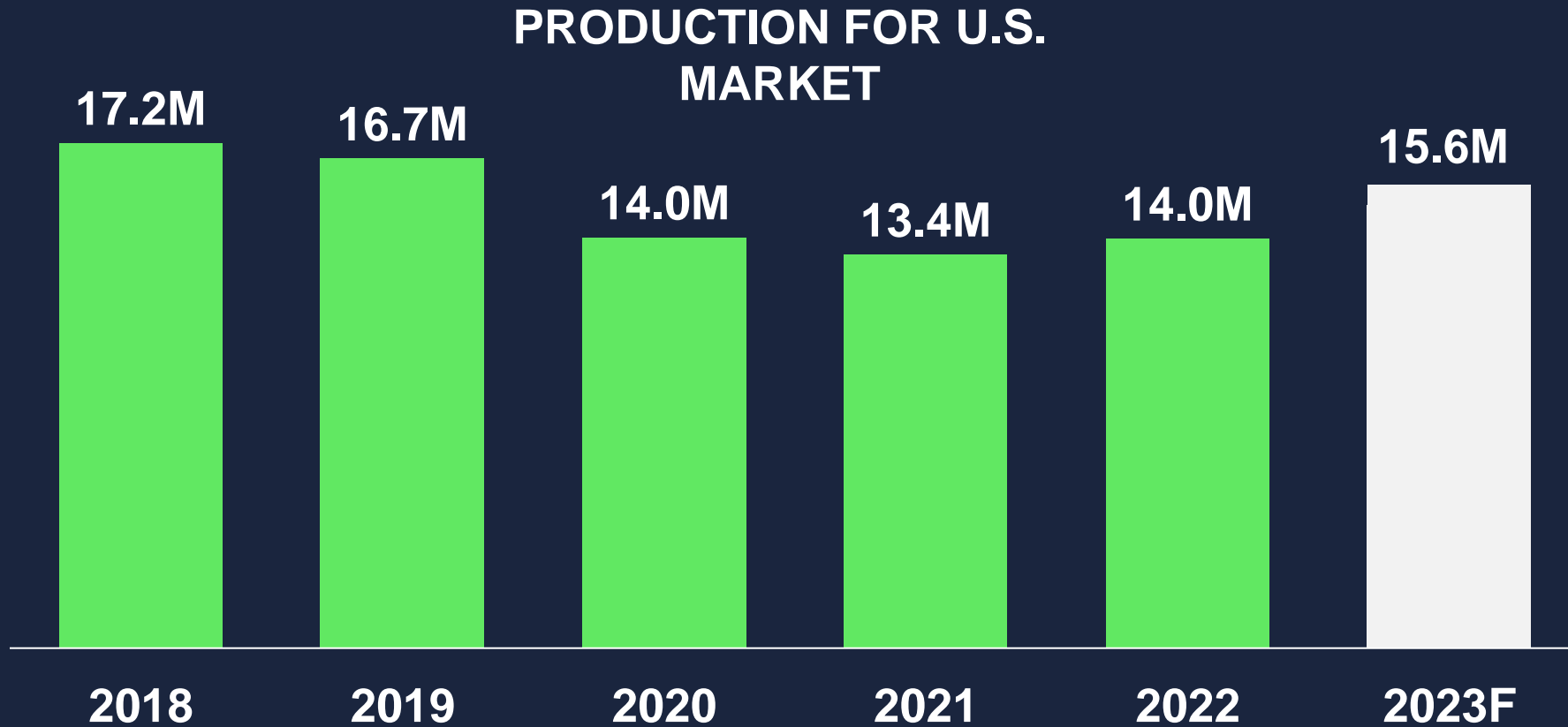


CUMULATIVE LOST SALES

FLEET
RETAIL

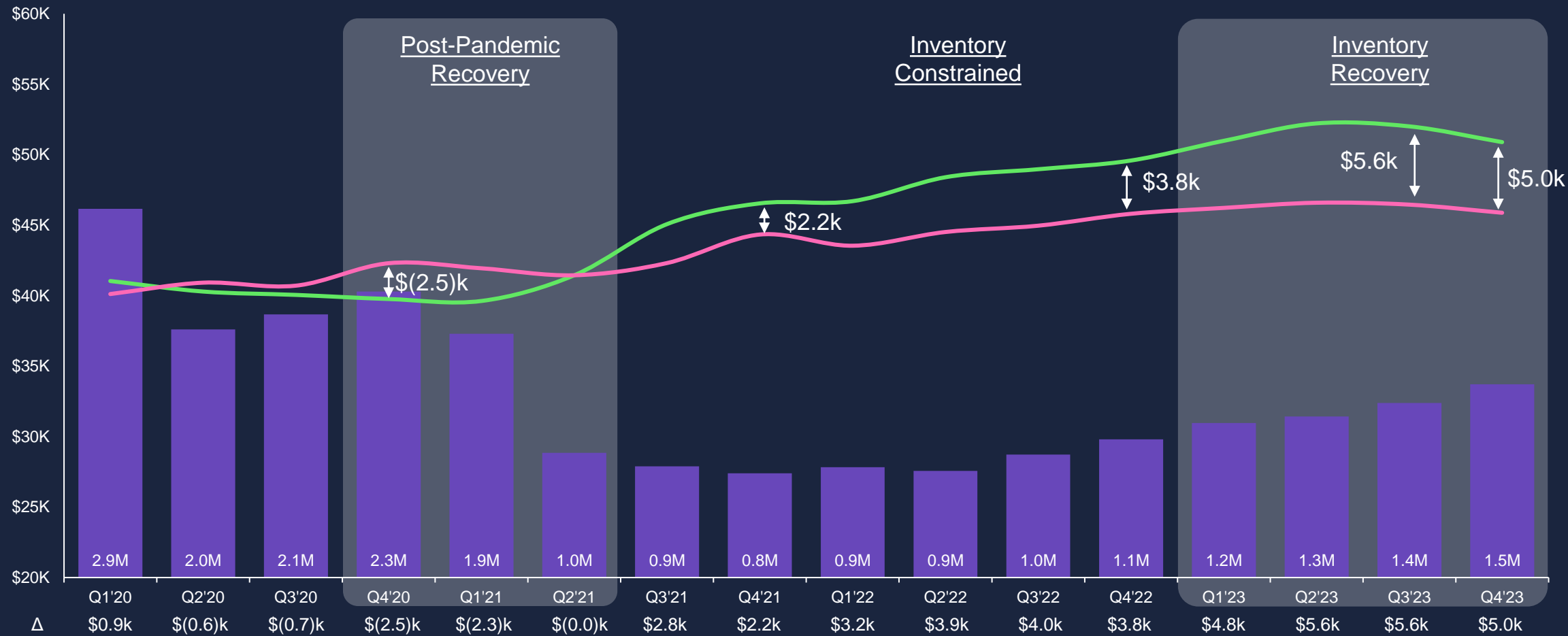


2.1M
RETAIL AND
FLEET SALES
WAITING ON
RIGHT VEHICLE
AND PRICE



Competitive asymmetry remains

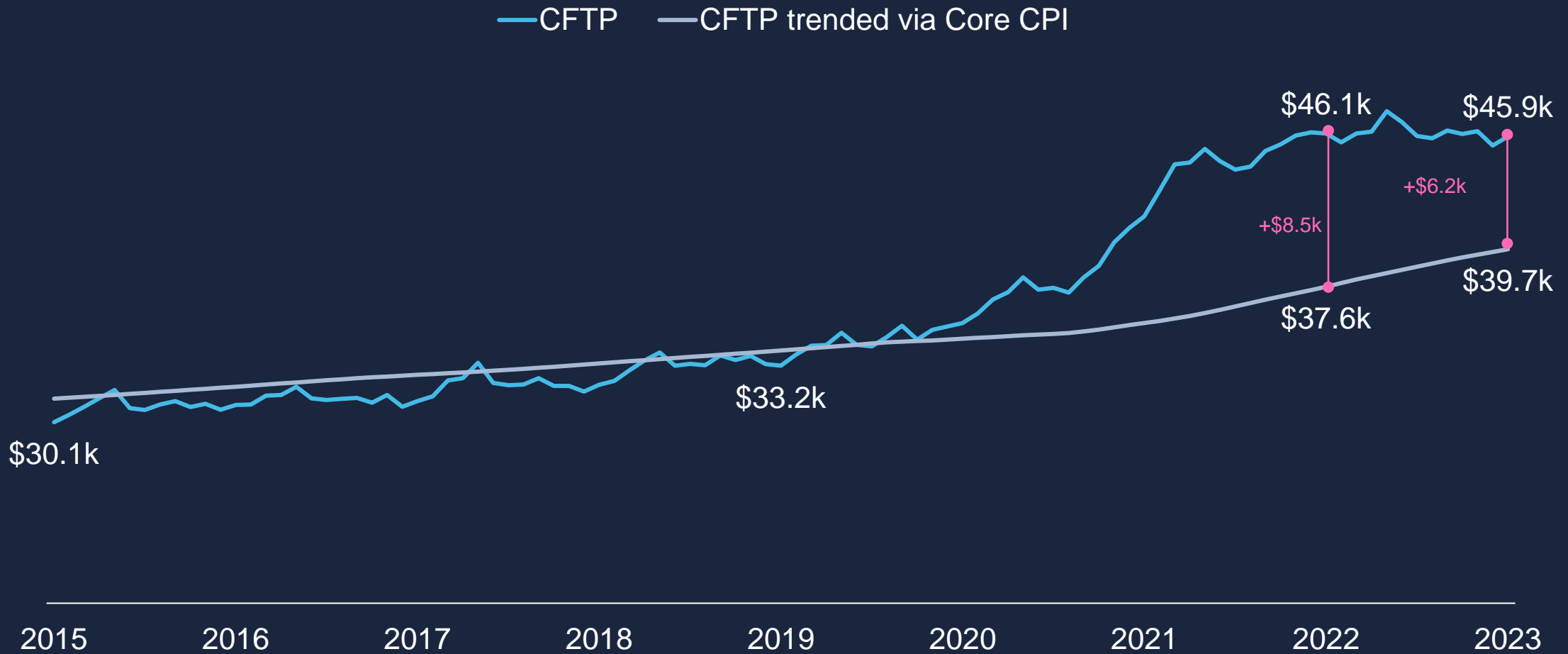
Inventory Inventory-Weighted MSRP Sales MSRP



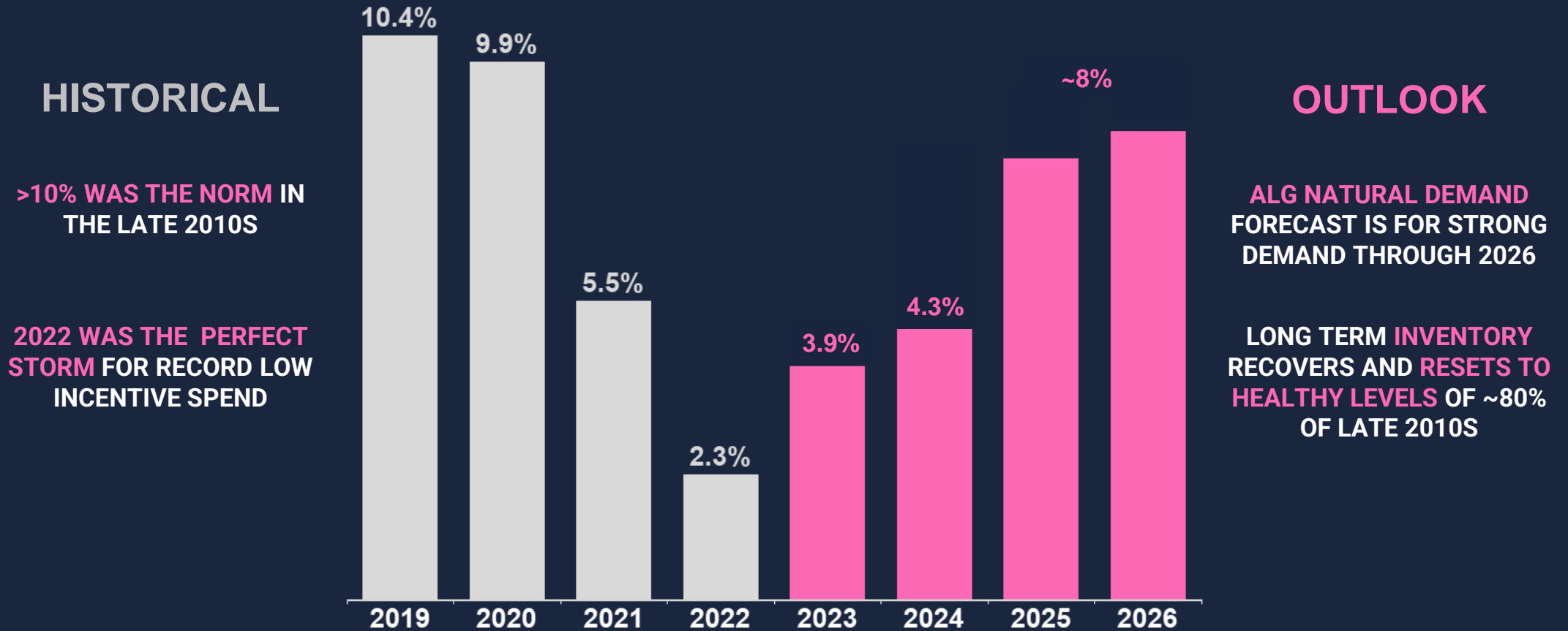
As the industry has begun to recover from the supply crisis, the price gap between what is on the ground and what is selling has steadily grown

Note: Q4'23 QTD, Inventory weighted at model level
 Source: J.D. Power Customer Success

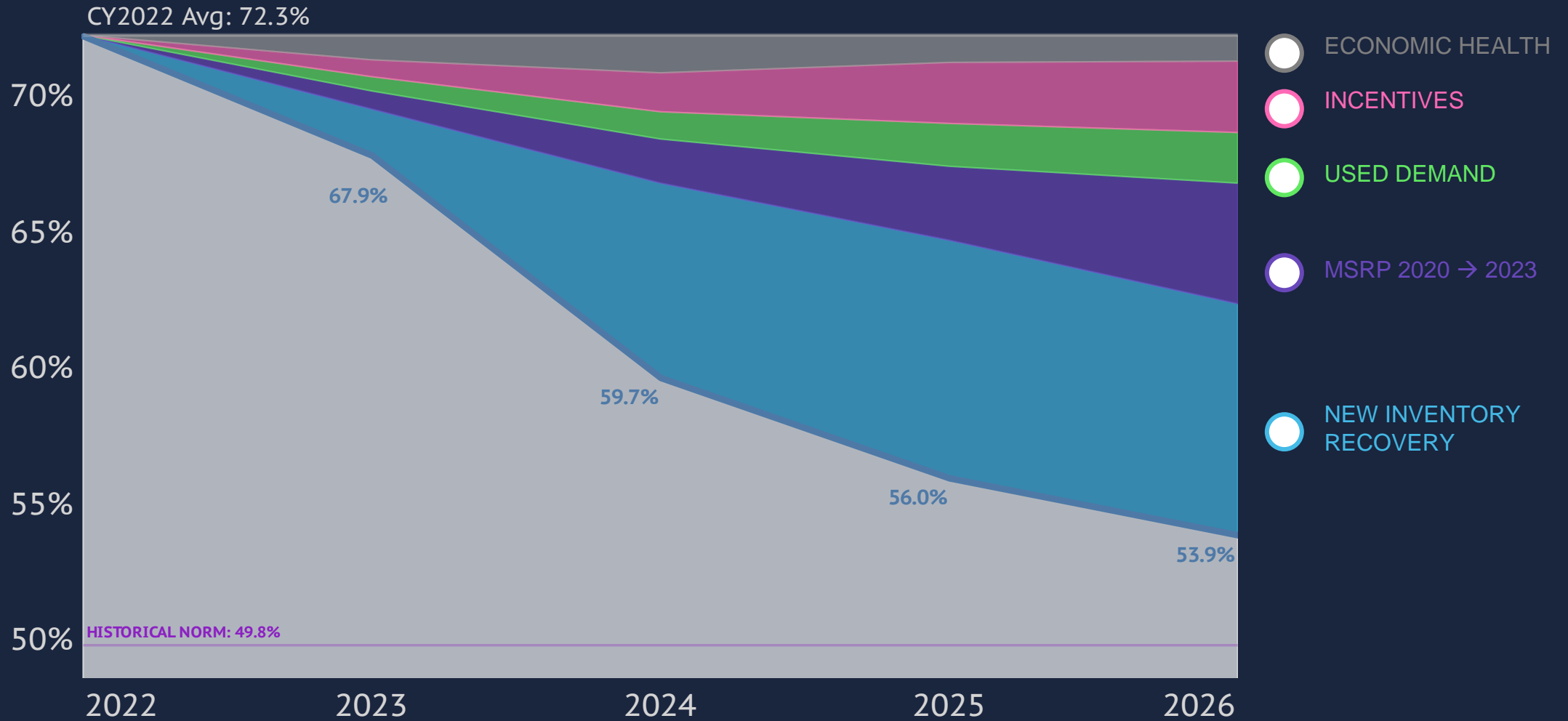
Affordability is recovering, but remains a concern



HISTORICAL INCENTIVE SPEND AND OUTLOOK



Future Residual Value Outlook



THANK YOU

AUTONOMOUS

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