

DoneDeal

The DoneDeal.ie Motor Industry Review


An analysis of trends in the
Irish car sales market for 2018 H1.



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Demand surges for Electric and Hybrid vehicles

“The first half of 2018 has
been a tale of two halves.

On one side of the coin, used car sales have slumped by 5% compared to last year, however interest in Electric and Hybrid vehicles has surged in a very clear and positive manner.

Of crucial importance to the used car market, as any market, is the volume of goods that are changing hands. Between January and June this year a total of 483,152 used cars have traded hands, compared to 507,300 in 2017, however, the rate of the decline slowed considerably in the second quarter with a difference of only 300 car sales (217,334 in Q2 2017 vs. 217,029 in Q2 2018). This sharp decrease in momentum is a clear sign that the slowdown in the used car market is somewhat abating.

On the other side of the scale, Electric car ads on DoneDeal have surged in recent months, with a 58% increase compared to H1 2017, Hybrid listings have risen by 65% in the same time period while Petrol listings are down 17% with Diesel ads up 11% to 215,937 units.

Electric car searches have also sky-rocketed with over 1 million searches taking place for Electric cars in the first six months of 2018, compared to 350,000 for the same time period last year – a rise of 217%.

As part of this report, we decided to conduct some depreciation analysis on used cars to identify the top five makes and models that have retained their value the most from when they were new in 2014/15.

The car that retained its value the most was the Skoda Octavia with an average depreciation of 31% since 2014/2015. Next best was the Volkswagen Golf (32%), followed by the Nissan Qashqai (40%), Volkswagen Passat (46%) and the Ford Focus (49%).

Volkswagen is the most popular used car make of 2018, with a total of 48,166 Volkswagens changing hands in the used car market (Jan-Jun 2018). Toyota (41,412) and Ford (40,018) were next best with Nissan (23,954) and then Audi (20,173) rounding out the top five.

During the months of May and June we surveyed over 1,000 people looking to purchase a car and found that 57% of respondents were interested in purchasing a vehicle that was four years or older, with just 13% in the market for a brand new motor.

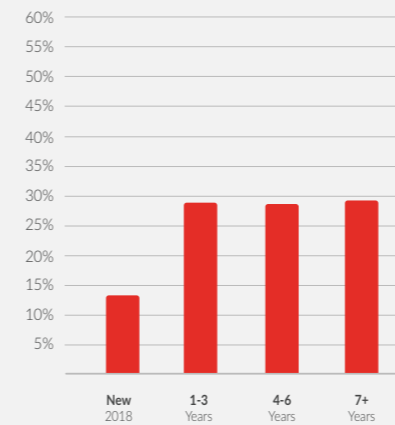
Among those surveyed, there was a strong preference towards Diesel when it came to engine type (63%) with 24% opting for a Petrol engine, while the remainder were split between Hybrid and Electric transmissions.

In the last six months alone we've witnessed over 31 million car searches taking place on our site. One of the most interesting stories from the data contained in this report is the clear trend that is emerging in the Electric car market, both from the number of users who are searching for Electric cars but also from the sharp increase in the volume of Electric car ads being placed.

Market Survey

Each quarter, DoneDeal.ie surveys over 1,000 motor market participants, asking them about their sense of the market as a whole, and their own intentions. Below are some of the headline results.

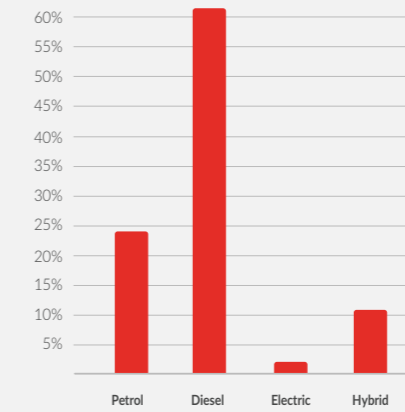
What year car are you most interested in buying?



Strong interest in 4+ years

57% of respondents have indicated that they would favour a vehicle 4 years or older when considering their next car purchase.

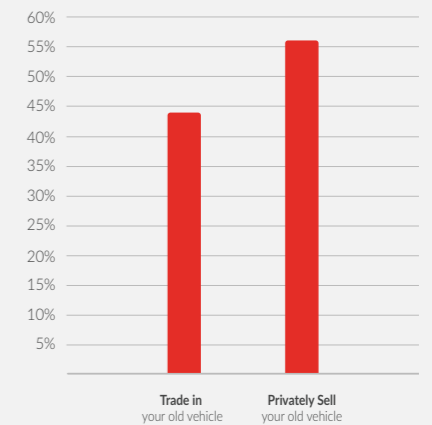
What type of engine are you most interested in buying?



Diesel Dominates

More than three out of every five people favour a diesel engine over any other type of transmission.

When purchasing a new car you will

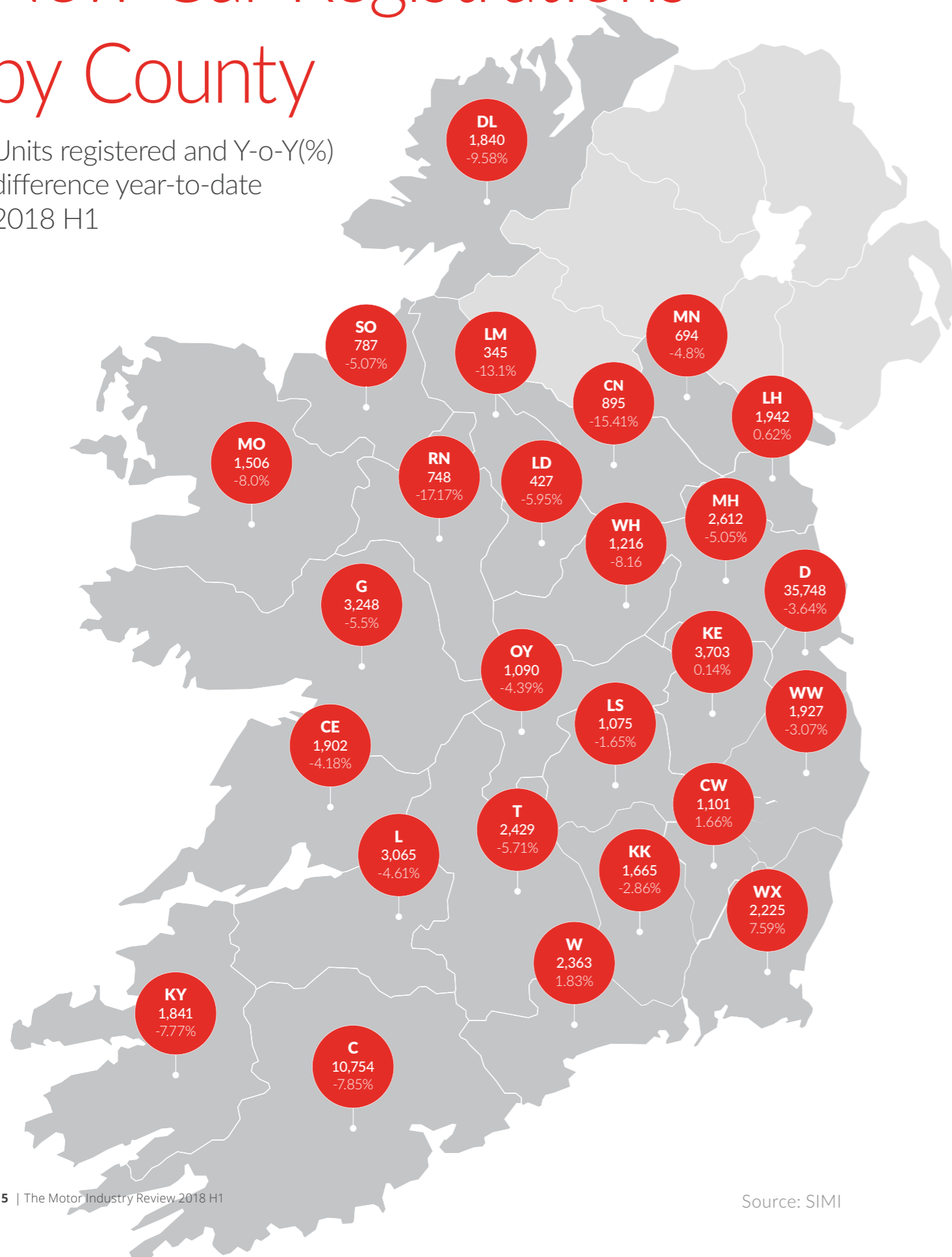


Private Sales

Slightly more users would opt to sell their older car privately over trading it in, however nearly 44% would prefer the trade in option.

New Car Registrations by County

Units registered and Y-o-Y(%) difference year-to-date 2018 H1



Top 10 Manufacturers

Number of new car registrations in H1 2018 by make

RANK	MAKE	2018 UNITS	MKT SHARE	YR CHANGE
1.	Volkswagen	9,503	10.9%	3.09%
2.	Toyota	8,454	9.7%	-5.01%
3.	Ford	8,257	9.47%	-3.7%
4.	Hyundai	7,889	9.05%	-7.9%
5.	Nissan	6,793	7.79%	-12.03%
6.	Skoda	6,296	7.22%	4.29%
7.	Renault	5,248	6.02%	4.38%
8.	Kia	4,868	5.59%	-18.62%
9.	Peugeot	3,695	4.24%	53%
10.	Audi	3,374	3.87%	-8.93%

Car Registrations by County

Every county with the exceptions of Carlow, Kildare, Louth and Wexford have experienced negative growth in new car registrations so far this year.

Used Car Transfers

H1 2017 **381,435** **-6% VARIANCE** H1 2018 **359,187**

*Source: NVDF Data H1 2017 vs H1 2018

Year-on-Year % change in searches by Fuel Type



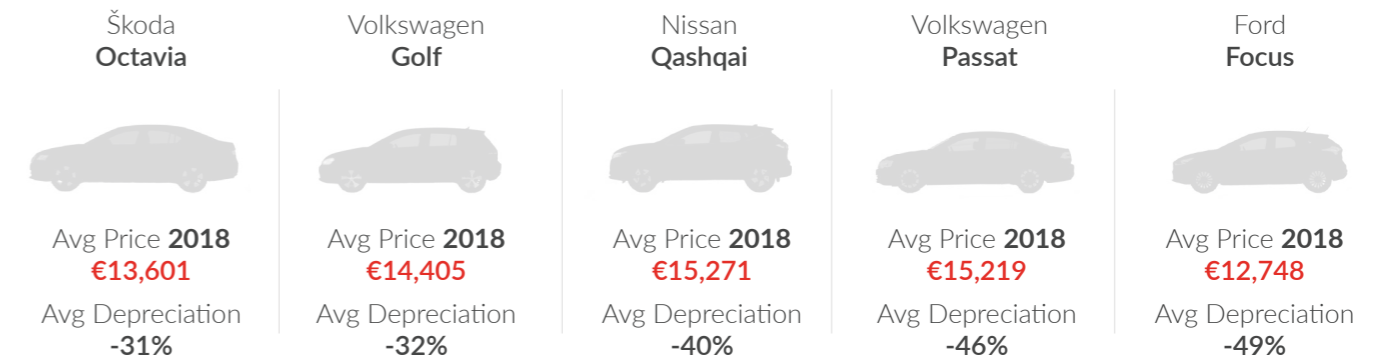
Tesla Searches on DoneDeal



“13 second-hand Teslas have been sold in the first half of 2018 with their average list price up by 12.46%”

Value retention of used vehicles

Of the best selling cars in 2014/2015 - which have retained their value the best?



Number of second-hand Electric car sales by make

MAKE	No. of listings		Avg List Price	
	2017	2018	2017	2018
Nissan	229	328	€10,761	€13,991
Renault	24	63	€10,561	€13,361
BMW	23	31	€21,138	€27,663
Hyundai	8	13	€18,179	€27,816
Tesla	6	13	€50,565	€57,287



Number of second-hand Hybrid car sales by make

MAKE	No. of listings		Avg List Price	
	2017	2018	2017	2018
Toyota	339	590	€12,547	€14,260
Honda	151	333	€8,254	€8,614
Lexus	205	189	€21,621	€22,111
Mitsubishi	13	40	€26,055	€21,960
BMW	9	30	€54,831	€48,787

Number of second-hand car sales by fuel type

Both Hybrid and Electric car listings have risen significantly year-on-year, however, Diesel remains the largest engine type with an 11.5% increase in listings to 215,937 for the first half of 2018 compared to the first six months of 2017.

		No. of Listings	Avg. Prices
	H1 2018 Y-o-Y	215,937 +11.50%	€13,339 +8.77%
	H1 2018 Y-o-Y	481 +57.65%	€16,441 +31.92%
	H1 2018 Y-o-Y	1,267 +64.75%	€15,685 +1.07%
	H1 2018 Y-o-Y	126,122 -16.48%	€8,942 +44.85%

DoneDeal.ie Snapshot of Irish Motor Landscape

Year-on-year market share and annual change (%) 2018

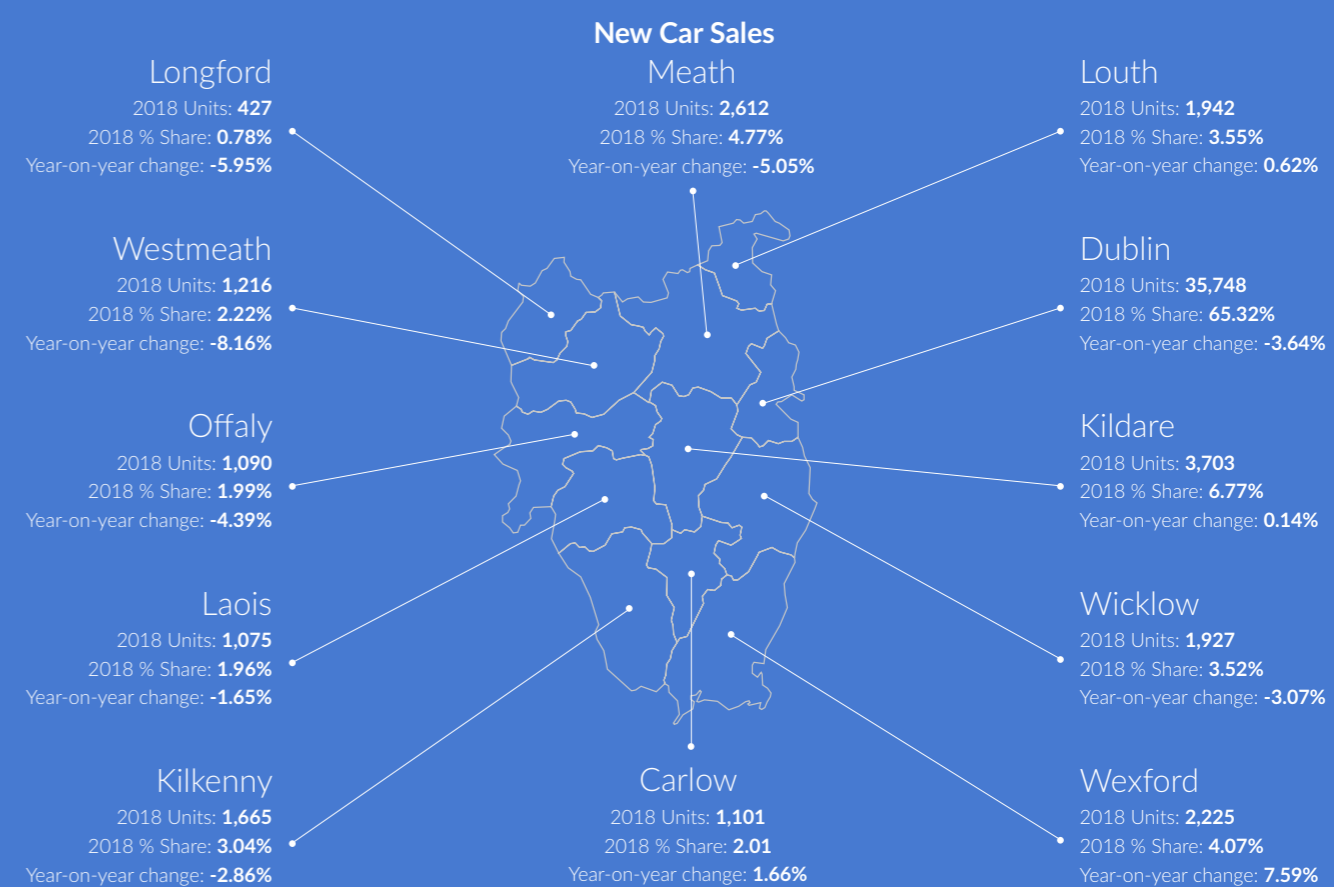
	MAKE	H1 2017	Q1 2018	Q2 2018	H1 2018	UNIT CHANGE	% CHANGE
TOP 30 USED CAR BRANDS	1 VOLKSWAGEN	49,684	24,225	23,941	48,166	-1,518	-3%
	2 TOYOTA	43,809	21,770	19,642	41,412	-2,397	-5%
	3 FORD	42,905	20,802	19,216	40,018	-2,887	-7%
	4 NISSAN	26,384	12,440	11,514	23,954	-2,430	-9%
	5 OPEL	20,919	9,293	8,937	18,230	-2,689	-13%
	6 AUDI	20,559	10,002	10,171	20,173	-386	-2%
	7 BMW	20,053	9,136	9,650	18,786	-1,267	-6%
	8 RENAULT	18,007	8,345	7,809	16,154	-1,853	-10%
	9 HYUNDAI	17,867	10,014	7,987	18,001	134	1%
	10 PEUGEOT	16,114	7,339	7,018	14,357	-1,757	-11%
	11 SKODA	12,948	7,067	6,312	13,379	431	3%
	12 MERCEDES-BENZ	12,556	5,762	5,554	11,316	-1,240	-10%
	13 KIA	8,616	4,982	4,016	8,998	382	4%
	14 HONDA	8,597	3,995	3,943	7,938	-659	-8%
	15 MAZDA	7,424	3,432	3,183	6,615	-809	-11%
	16 SEAT	7,218	3,546	3,319	6,865	-353	-5%
	17 CITROEN	6,518	3,005	3,131	6,136	-382	-6%
	18 VAUXHALL	6,259	2,958	3,121	6,079	-180	-3%
	19 VOLVO	5,071	2,567	2,503	5,070	-1	0%
	20 FIAT	4,820	1,930	1,958	3,888	-932	-19%
	21 SUZUKI	4,008	2,088	1,849	3,937	-71	-2%
	22 MITSUBISHI	3,352	1,493	1,437	2,930	-422	-13%
	23 MINI	2,579	1,270	1,404	2,674	95	4%
	24 LEXUS	2,478	1,247	1,355	2,602	124	5%
	25 DACIA	2,271	1,416	1,067	2,483	212	9%
	26 LANDROVER	1,887	892	913	1,805	-82	-4%
	27 SAAB	1,746	693	763	1,456	-290	-17%
	28 CHEVROLET	1,129	467	580	1,047	-82	-7%
	29 JAGUAR	1,093	514	567	1,081	-12	-1%
	30 SUBARU	905	404	423	827	-78	-9%

	MAKE	MODEL	2017 UNITS	% SHARE	2018 UNITS	% SHARE	% CHANGE
TOP 15 NEW REGISTRATIONS	1 NISSAN	QASHQAI	3146	3.5%	3045	3.5%	-3.21
	2 HYUNDAI	TUCSON	3575	3.9%	2919	3.4%	-18.35
	3 VOLKSWAGEN	GOLF	2746	3.0%	2589	3.0%	-5.72
	4 FORD	FOCUS	2611	2.9%	2495	2.9%	-4.44
	5 SKODA	OCTAVIA	2787	3.1%	2484	2.9%	-10.87
	6 KIA	SPORTAGE	2193	2.4%	2164	2.5%	-1.32
	7 TOYOTA	YARIS	1914	2.1%	2023	2.3%	5.69
	9 VOLKSWAGEN	TIGUAN	1586	1.7%	1986	2.3%	25.22
	10 FORD	FIESTA	2427	2.7%	1946	2.2%	-19.82
	11 TOYOTA	C-HR	1364	1.5%	1768	2.0%	29.62
	12 NISSAN	MICRA	1060	1.16%	1613	1.85%	52.17
	13 TOYOTA	AURIS	1332	1.46%	1529	1.75%	14.79
	14 VOLKSWAGEN	POLO	1404	1.54%	1484	1.7%	5.7
	15 FORD	KUGA	1148	1.26%	1443	1.66%	25.7

	MAKE	MODEL	2017 UNITS	% SHARE	2018 UNITS	% SHARE	% CHANGE
TOP 15 IMPORTS	1 VOLKSWAGEN	GOLF	2776	6.03	2957	5.7%	6.52
	2 FORD	FOCUS	3265	7.1	2819	5.43%	-13.66
	3 BMW	5 SERIES	1188	2.58	1794	3.46%	51.01
	4 NISSAN	QASHQAI	1446	3.14	1688	3.25%	16.74
	5 VOLKSWAGEN	PASSAT SALOON	1484	3.23	1517	2.92%	2.22
	6 AUDI	A4	1473	3.2	1485	2.86%	0.81
	7 HYUNDAI	I30	1193	2.59	1443	2.78%	20.96
	8 AUDI	A6	1146	2.49	1207	2.33%	5.32
	9 MERCEDES-BENZ	E CLASS	1021	2.22	1195	2.3%	17.04
	10 BMW	3 SERIES	887	1.93	1117	2.15%	25.93
	11 MERCEDES-BENZ	C CLASS	716	1.56	1015	1.96%	41.76
	12 FORD	FIESTA	986	2.14	967	1.86%	-1.93
	13 SKODA	OCTAVIA	618	1.34	899	1.73%	45.47
	14 OPEL	INSIGNIA	1081	2.35	882	1.7%	-18.41
	15 TOYOTA	AURIS	813	1.77	882	1.7%	8.49

Leinster

56% of all cars advertised in Leinster were in Dublin



VW MOST POPULAR MAKE

Volkswagen was the top selling car brand in Leinster with a 10.91% market share. Hyundai (9.38%) and Toyota (8.45%) closed out the top three spots.

USED IMPORTS UP 17%

28,106 used imports were registered in Leinster in the first six months of 2018, a 16.69% rise on 2017.

7.37% RISE IN LCV SALES

Across Leinster light commercial vehicle sales were up by 7.37% in 2018 when compared to the same time period in 2017.

HCV SALES DOWN 5.56%

Overall sales of heavy commercial vehicles were down 5.56% year-on-year across Leinster.

Fuel Type Listings Leinster



DIESEL

112,461
LISTINGS



ELECTRIC

360
LISTINGS



HYBRID

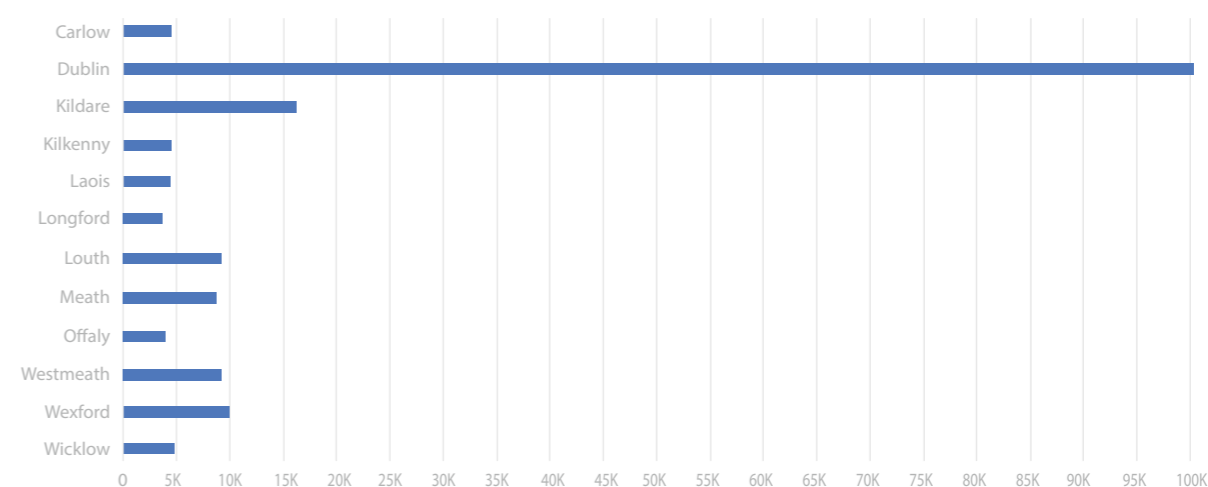
1,071
LISTINGS



PETROL

74,938
LISTINGS

Number of ads on DoneDeal (Count) 2018 H1

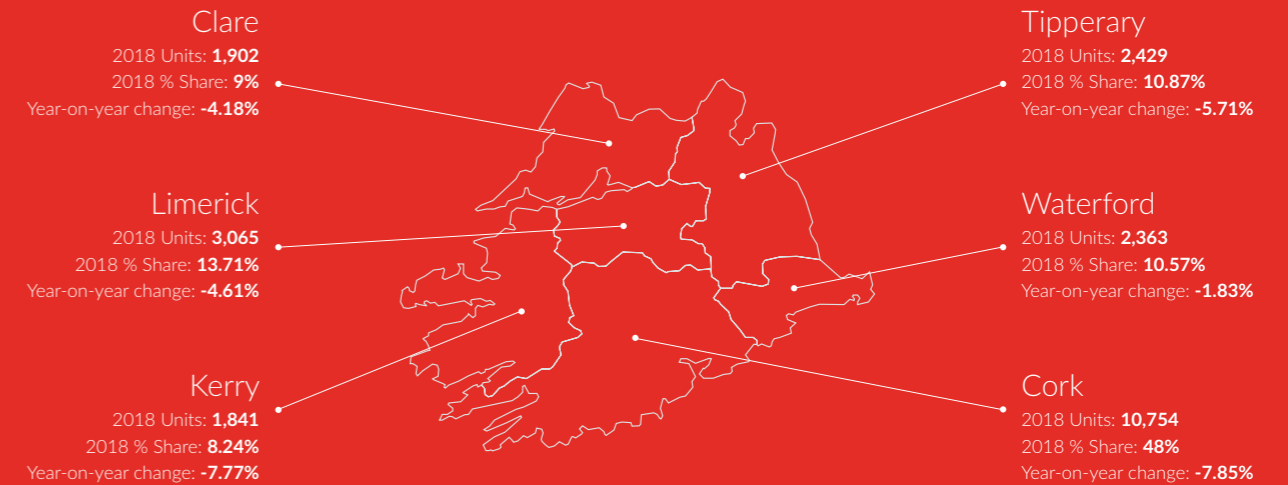


Number of ads placed on DoneDeal.ie (Count) in 2018 H1 broken down by county

Munster

46% of all cars advertised in Munster were in Cork

New Car Sales



FORD MOST POPULAR MAKE

Ford was the top selling car brand in Munster with a 12.43% market share. Toyota (10.77%) and Volkswagen (10.07%) closed out the top three spots.

USED IMPORTS UP 13%

11,809 used imports were registered in Leinster in the first six months of 2018, a 13.23% rise on 2017.

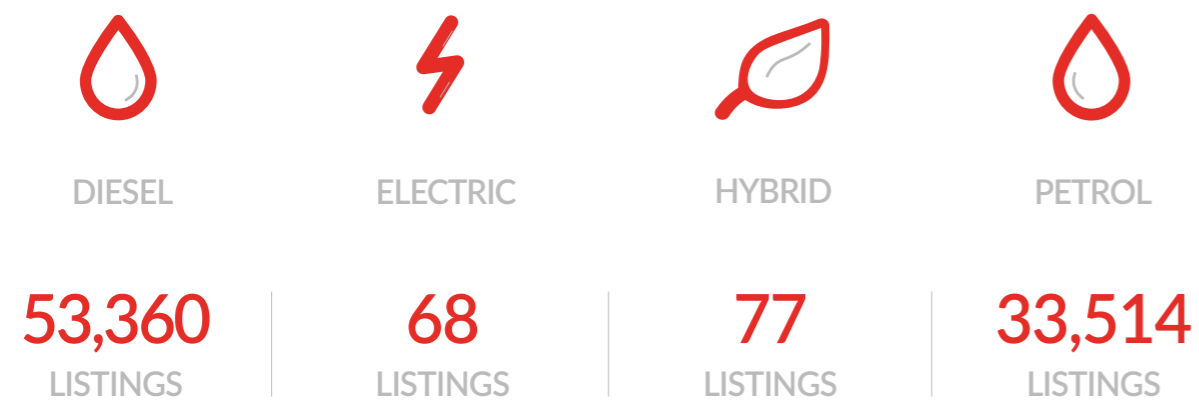
1% RISE IN LCV SALES

Across Munster light commercial vehicle sales were up by 1% (0.88%) in 2018 when compared to the same time period in 2017.

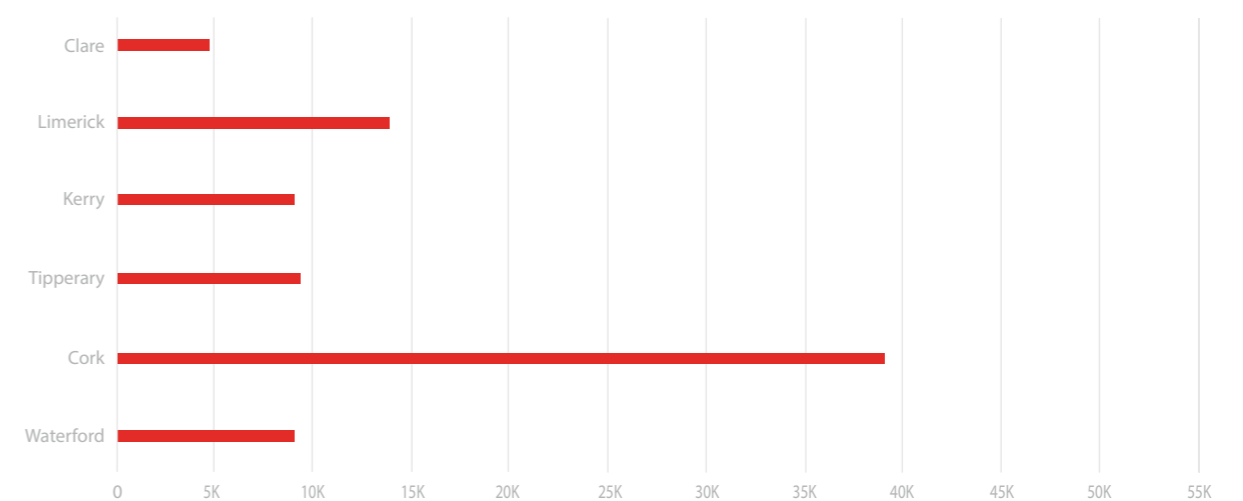
HCV SALES DOWN 0.25%

Overall sales of heavy commercial vehicles were down 0.25% year-on-year across Munster.

Fuel Type Listings Leinster



Number of ads on DoneDeal (Count) 2018 H1

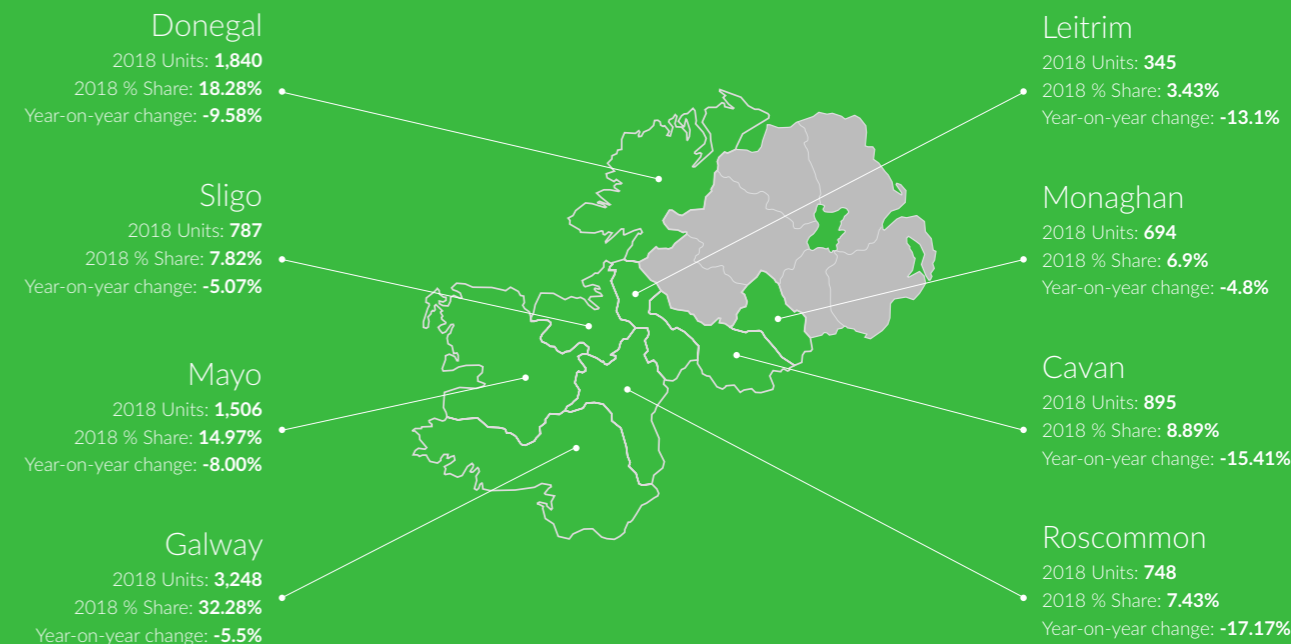


Number of ads placed on DoneDeal.ie (Count) in 2018 H1 broken down by county

Connacht/Ulster

26% of all cars advertised in Connacht/Ulster were in Galway

New Car Sales



TOYOTA MOST POPULAR

Toyota was the top selling car brand in Connacht/Ulster with a 14.12% market share. Volkswagen (12.74%) and Hyundai (9.73%) closed out the top three spots.

USED IMPORTS UP 4%

11,487 used imports were registered in Connacht/Ulster in the first six months of 2018, a 4.14% rise on 2017.

7% RISE IN LCV SALES

Across Connacht/Ulster light commercial vehicle sales were up by 6.71% in 2018 when compared to the same time period in 2017

HCV SALES UP 16%

Overall sales of heavy commercial vehicles were up 16.14% year-on-year across Connacht/Ulster.

Fuel Type Listings Leinster



DIESEL

50,116 LISTINGS



ELECTRIC

53 LISTINGS



HYBRID

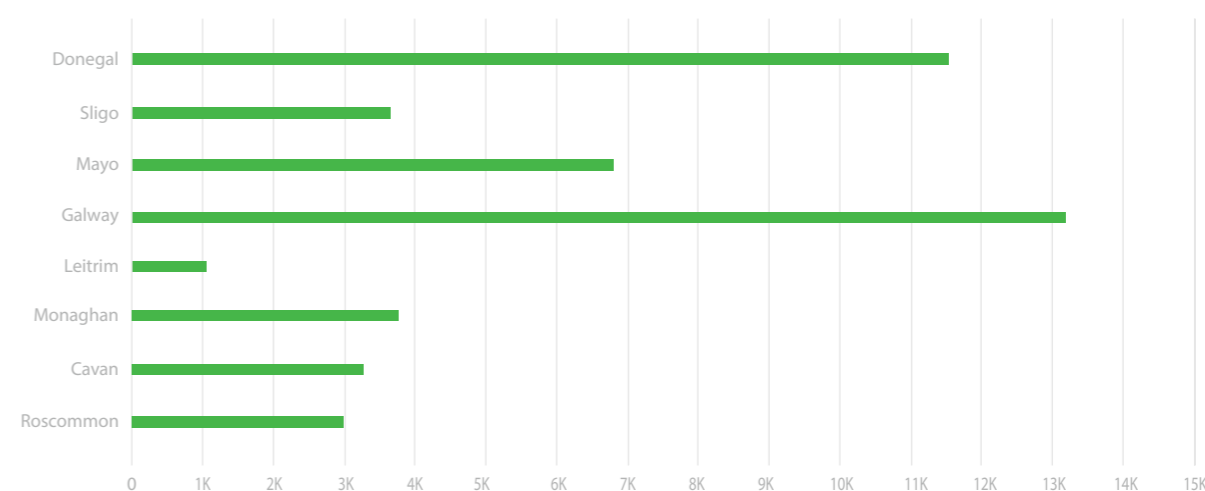
119 LISTINGS



PETROL

17,670 LISTINGS

Number of ads on DoneDeal (Count) 2018 H1



Number of ads placed on DoneDeal.ie (Count) in 2018 H1 broken down by county

The goal of the DoneDeal.ie Motor Industry Review is to use the information in this report to help all actors in the motor market make informed decisions about buying and selling. In addition, because it is freely available, the DoneDeal.ie Motor Industry Review can help inform the media, the general public and policymakers about the latest developments in the motor market.

About the Report

Over the last number of years, DoneDeal.ie has collected a vast amount of data on the Irish motor market. Each year hundreds of thousands of motors are advertised on the site.

Methodology and Sample Size

The statistics are based on motors advertised on DoneDeal.ie for a given period in addition to publicly available information about the Irish Motor Industry.

About DoneDeal.ie

DoneDeal.ie is Ireland's largest motor classifieds advertising website with over 1.5 million weekly visitors.

Disclaimer

The DoneDeal.ie Motor Industry Review is prepared from information that we believe is collated with care, but we do not make any statement as to its accuracy or completeness. We reserve the right to vary our methodology and to edit or discontinue the indices, snapshots or analysis at any time for regulatory or other reasons. Persons seeking to place reliance on any information contained in this report for their own or third party commercial purposes do so at their own risk.

Credits

Marketing and Communications: **Martin Clancy**
Layout and Design: **William Tector**

DoneDeal

Dealer Performance H1 2018



“Since joining DoneDeal 5 months ago we have seen a significant increase in leads to our dealerships. The uplift is most definitely attributed to the performance of the site, as well as the the high quality account management we receive

-Paul Lyttleton, Director, Barlo Motor Group

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