

TVB

Local Media
Marketing Solutions

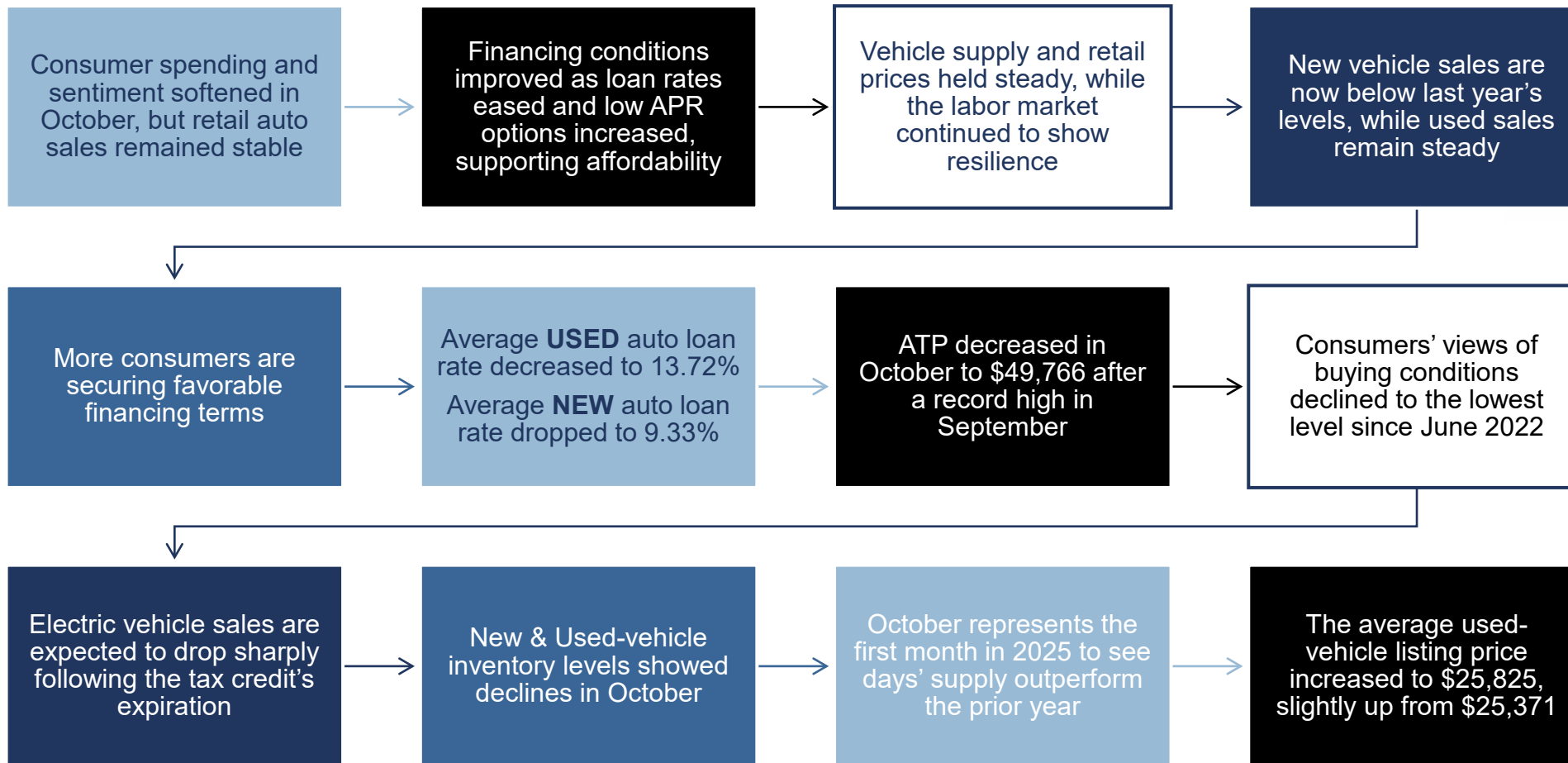
October Automotive Update

Trisha Ripperger, SVP Strategic Communications & Category Development

October Sales Review

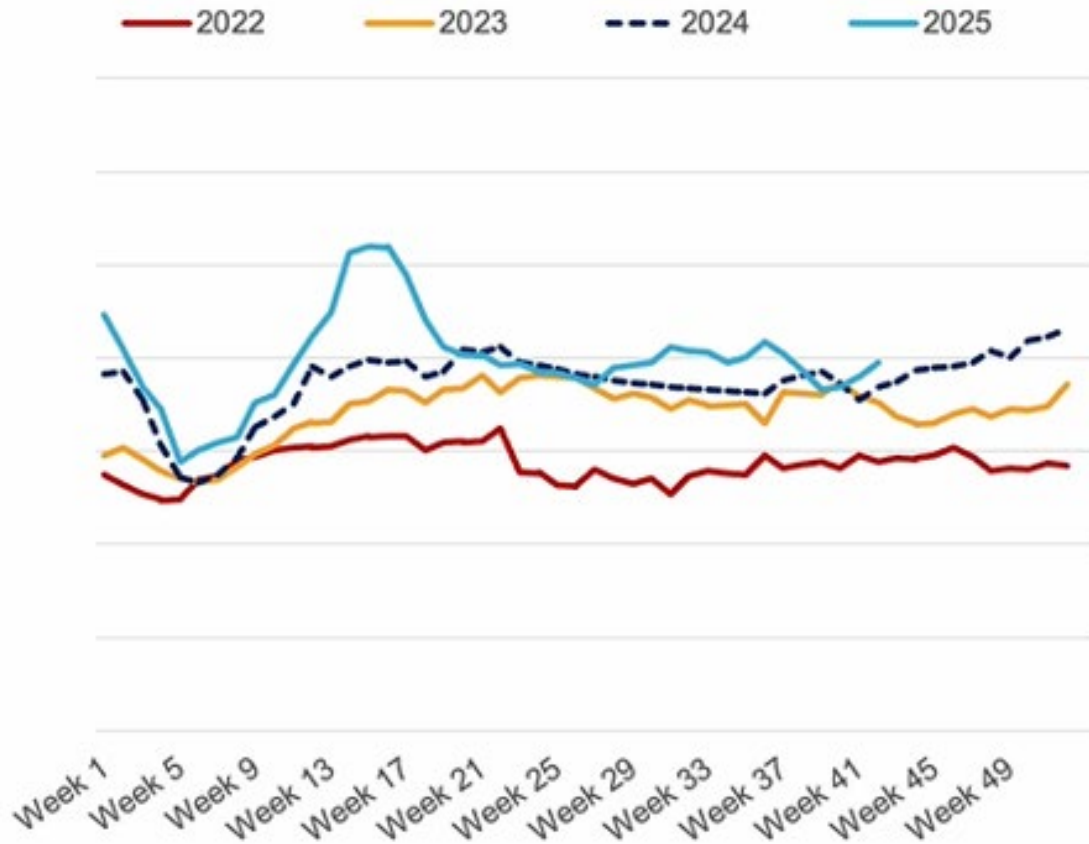
	2025	2024	% Change
Total Sales	1,284,173	1,331,769	- 3.6%
Retail Sales	1,098,585	1,124,320	- 2.3%
SAAR	15.3 mil	16.1 mil	- 4.9%
Retail SAAR	13.0 mil	13.3 mil	+ 2.7%

KEY HIGHLIGHTS

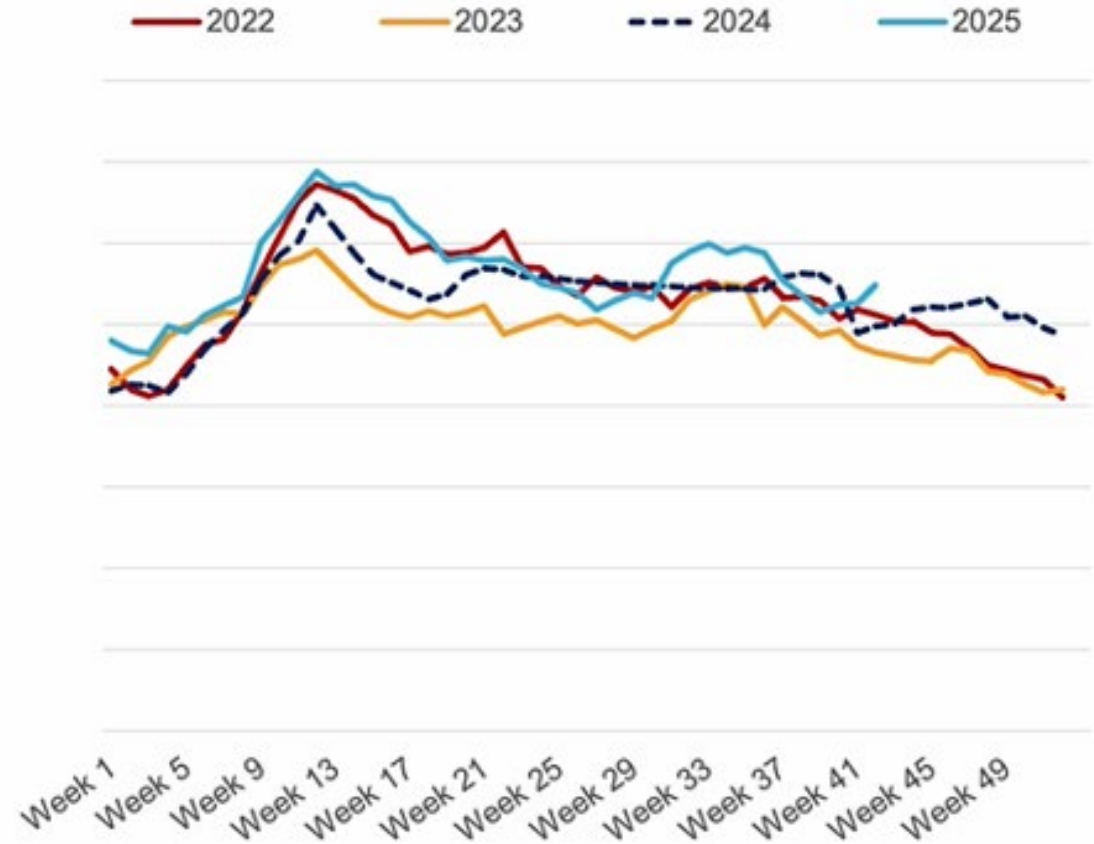


New & Used SALES recovered modestly in October

New Retail Sales

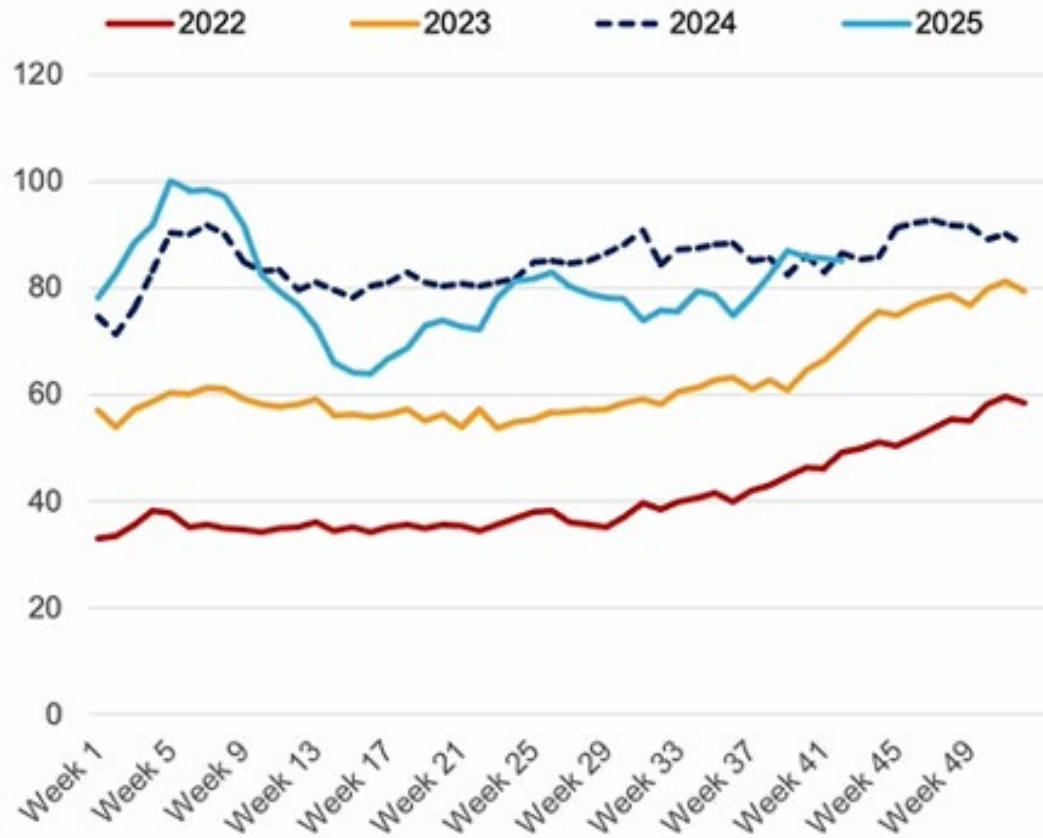


Used Retail Sales

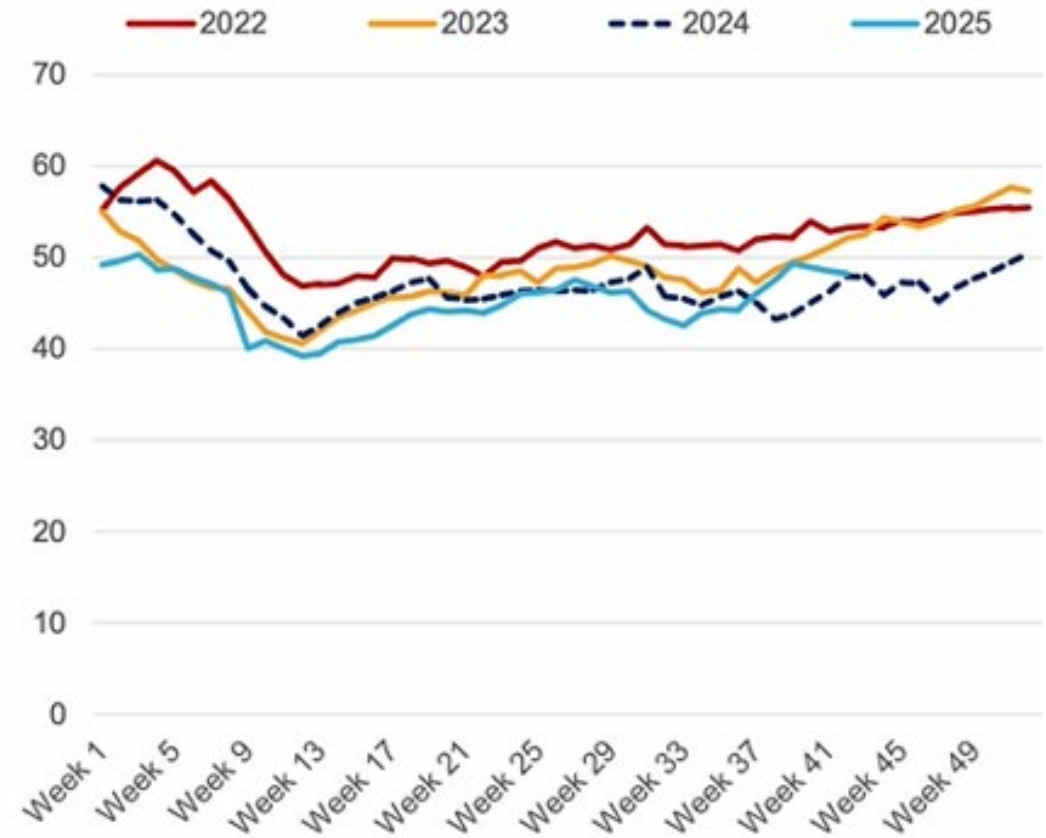


New & Used SUPPLY declines in October







New Days' Supply



Used Days' Supply



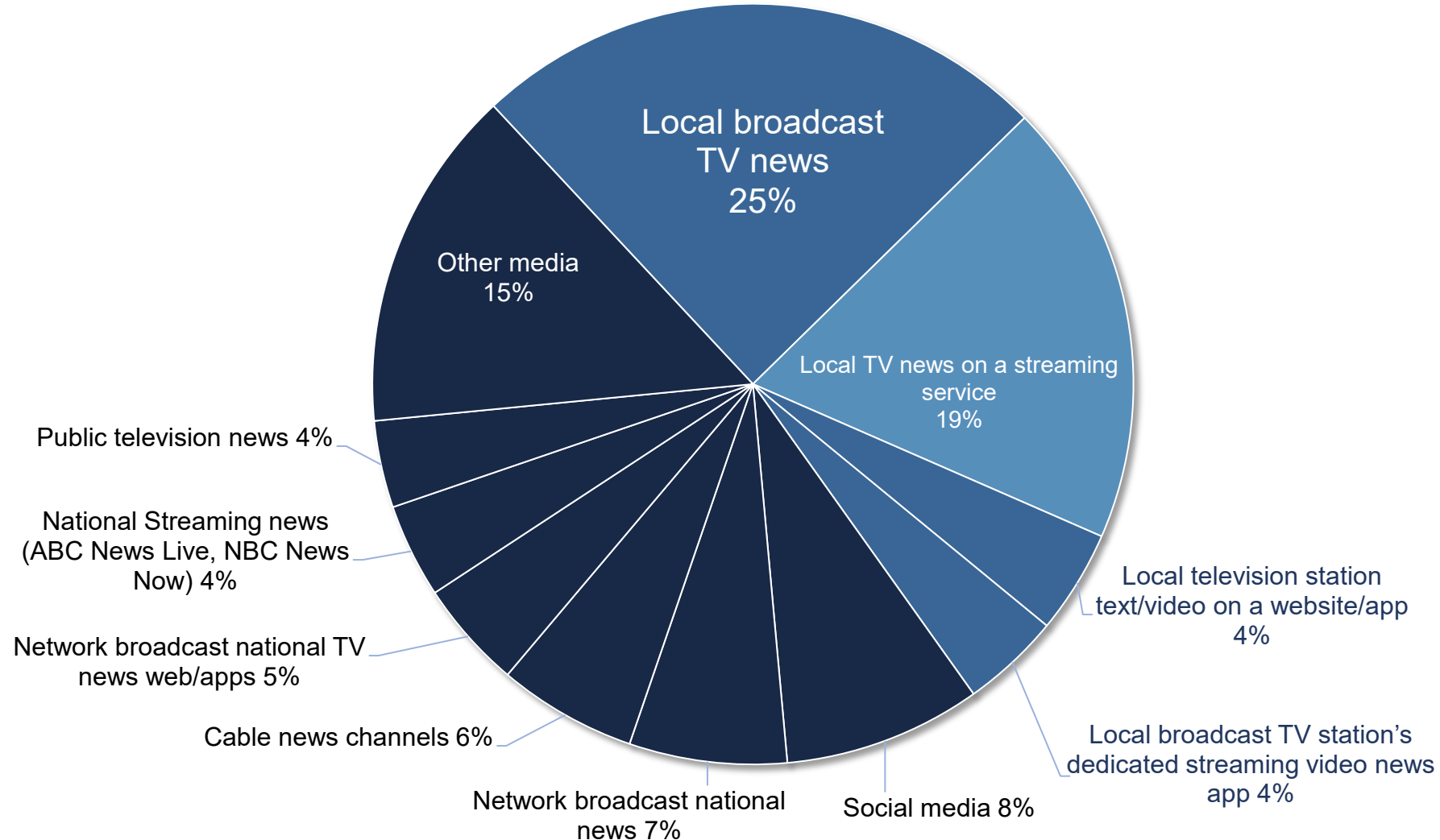
Updated Forecasts

 <p>15.8 – 16.4M 16.1 Baseline</p> <p>NEW SALES (Original Forecast: 16.3M)</p>	 <p>12.9 – 13.3M 13.1M</p> <p>NEW RETAIL SALES (Original Forecast: 13.3M)</p>	 <p>2.8 – 3.0M 2.9M</p> <p>FLEET SALES (Original Forecast: 3.0M)</p>
<p>3.1 – 3.3M 3.2M</p> <p>NEW LEASE VOLUME (Original Forecast: 3.3M)</p>	 <p>24%</p> <p>LEASE PENETRATION (Original Forecast: 25%)</p>	 <p>2.5 – 2.7M 2.6M</p> <p>CPO SALES (Original Forecast: 2.5M)</p>
<p>37.9 – 38.5M 38.3M</p> <p>USED SALES (Original Forecast: 37.8M)</p>	 <p>20.0 – 20.5M 20.3M</p> <p>USED RETAIL SALES (Original Forecast: 20.1M)</p>	<p>1.5% - 2.1% 1.8%</p> <p>DEC 2025 Y/Y MANHEIM USED VEHICLE VALUE INDEX (Original Forecast: +1.4%)</p>

Take Action!

- Sales Opportunities- Dealers must get their message out now using traditional and digital video to reach the most consumers possible and gain sales....It's a why buy message from "X" dealer...if I'm in market today and building (Their) **brand equity** for future sales.
- Financing deals are available – Example messaging to craft for sales acquisition: ***"You could get a newer vehicle with a lower payment"*** (Recommend taking *sample creative to your dealers*).
- Consumer views of buying conditions have declined – Dealers need to ***use the most trusted media to instill confidence.*** Make it easy for them to do so. Use the next 2 slides from TVB Research in your presentation.

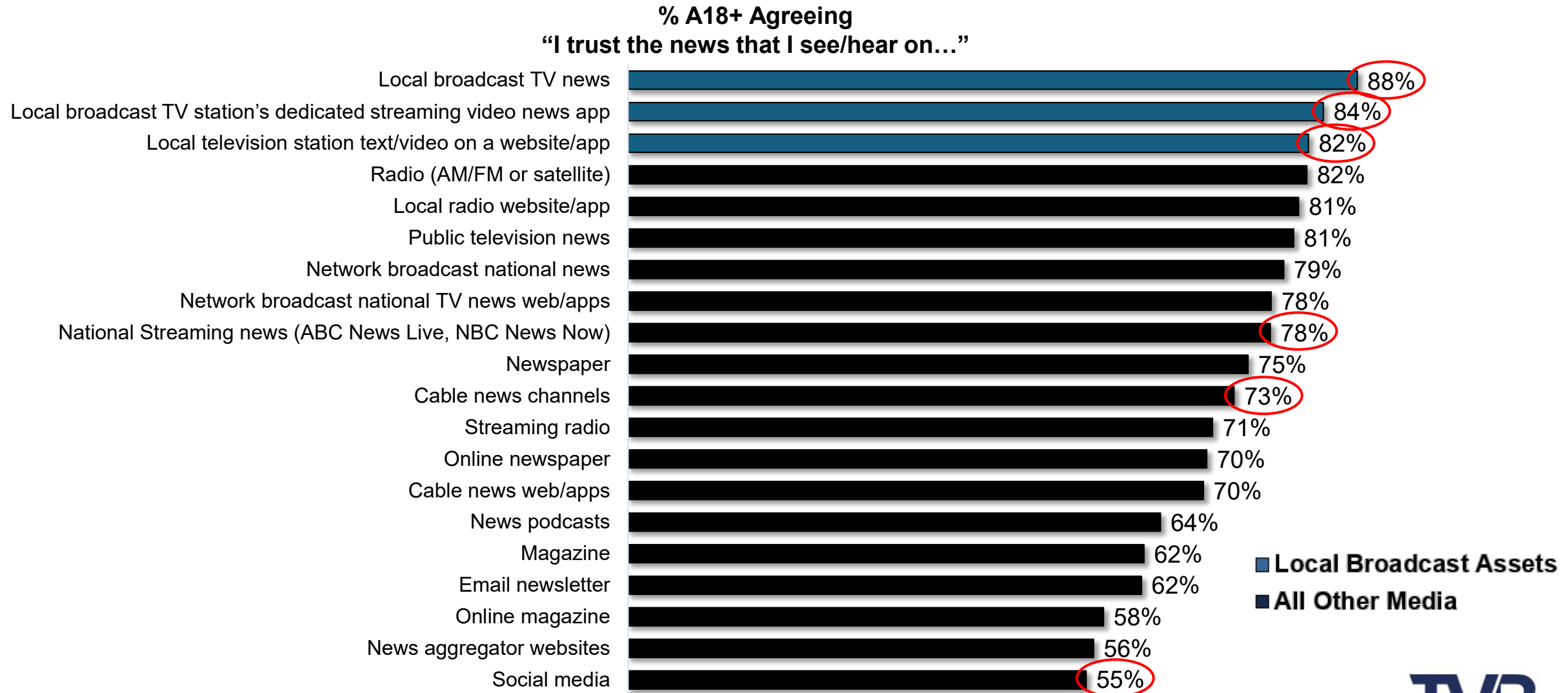
Which Source of News Do You Feel is The Most Involved in Your Community?



Source: GfK/NIQ TVB Local News Study 2025 A18+. A05 And which source of news do you feel is the most involved in your community? Includes only those who chose a media.



Local Broadcast TV News Assets Are #1 For Trust, Far More Than Cable, National Streaming News, and Social Media



Source: GfK/NIQ TVB Local News Study 2025 A18+. A16 For each source, please indicate the extent to which you agree or disagree with the following statement: I trust the news that I see/hear on this media source. Top two boxes shown (agree strongly & agree somewhat).

