Market Intelligence

28 July 2021

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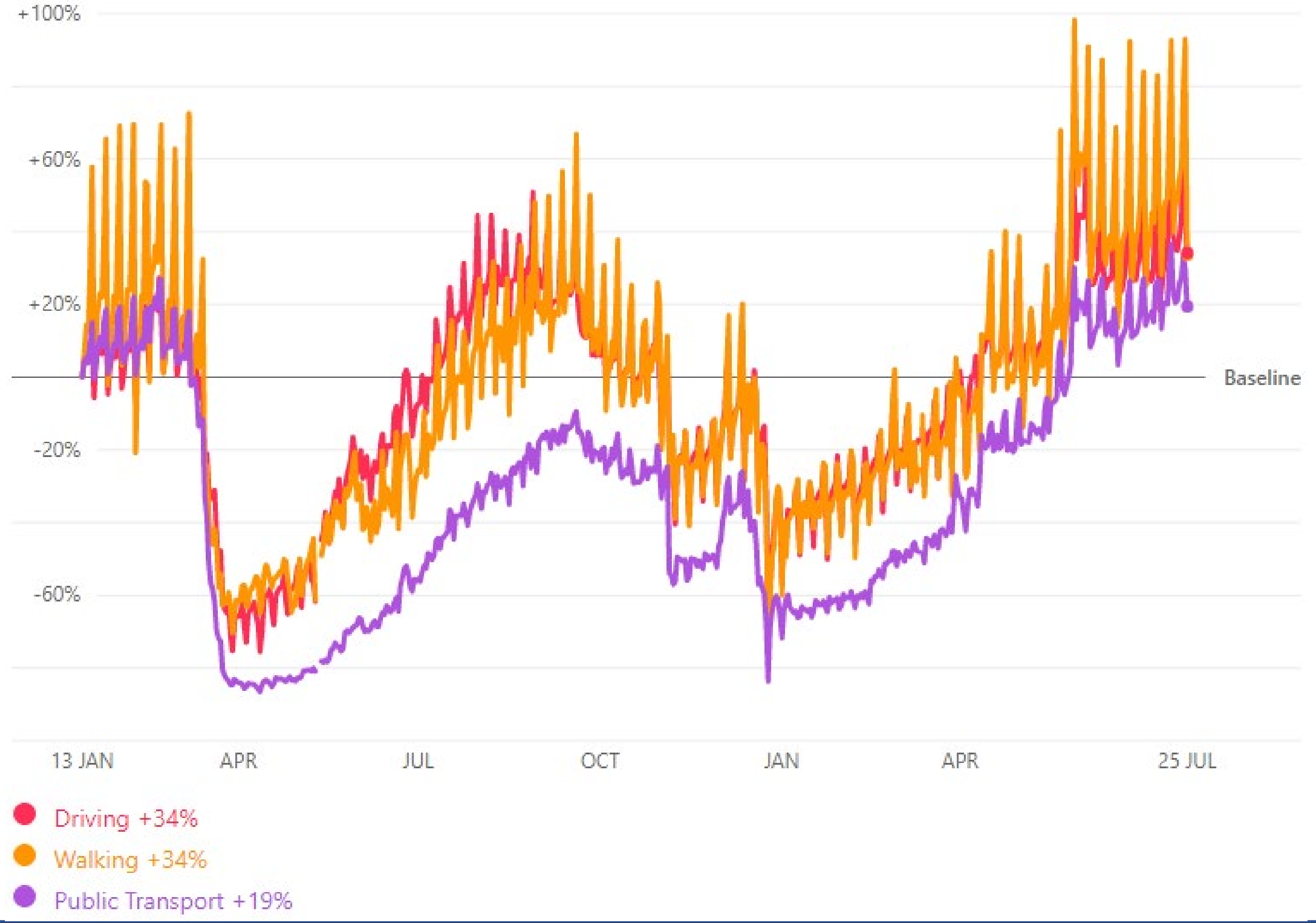
Apple Mobility Trends Report

UK 27/07/21



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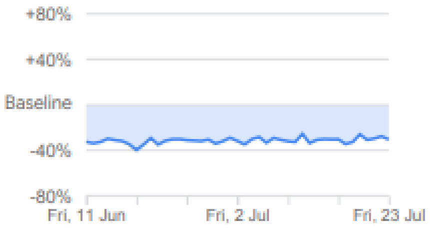
Google Covid-19 Community Mobility Report

Greater London 23/07/21

Retail and recreation

-30%

compared to baseline



Mobility trends for places such as restaurants, cafés, shopping centres, theme parks, museums, libraries and cinemas.

10/07/21

Retail and recreation

-33%

compared to baseline

Public transport

-35%

compared to baseline

Workplaces

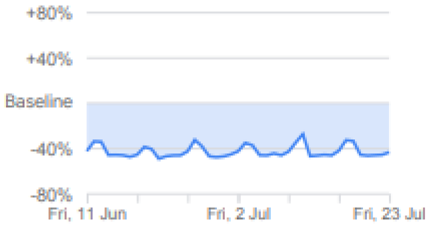
-11%

compared to baseline

Public transport

-43%

compared to baseline

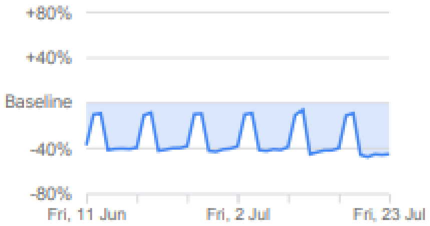


Mobility trends for places that are public transport hubs, such as underground, bus and train stations.

Workplaces

-45%

compared to baseline



Mobility trends for places of work.

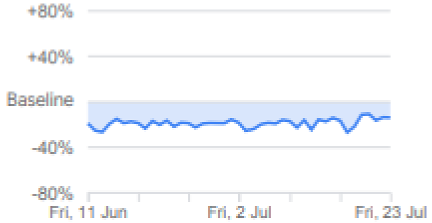
Google Covid-19 Community Mobility Report

Greater Manchester 10/07/21

Retail and recreation

-14%

compared to baseline



Mobility trends for places such as restaurants, cafés, shopping centres, theme parks, museums, libraries and cinemas.

Public transport

-40%

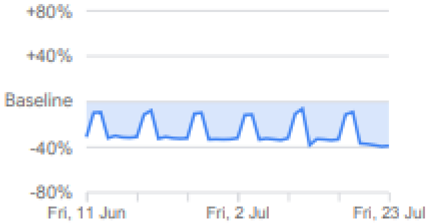
compared to baseline

Mobility trends for places that are public transport hubs, such as underground, bus and train stations.

Workplaces

-39%

compared to baseline



Mobility trends for places of work.

10/07/21

Retail and recreation

-23%

compared to baseline

Public transport

-38%

compared to baseline

Workplaces

-10%

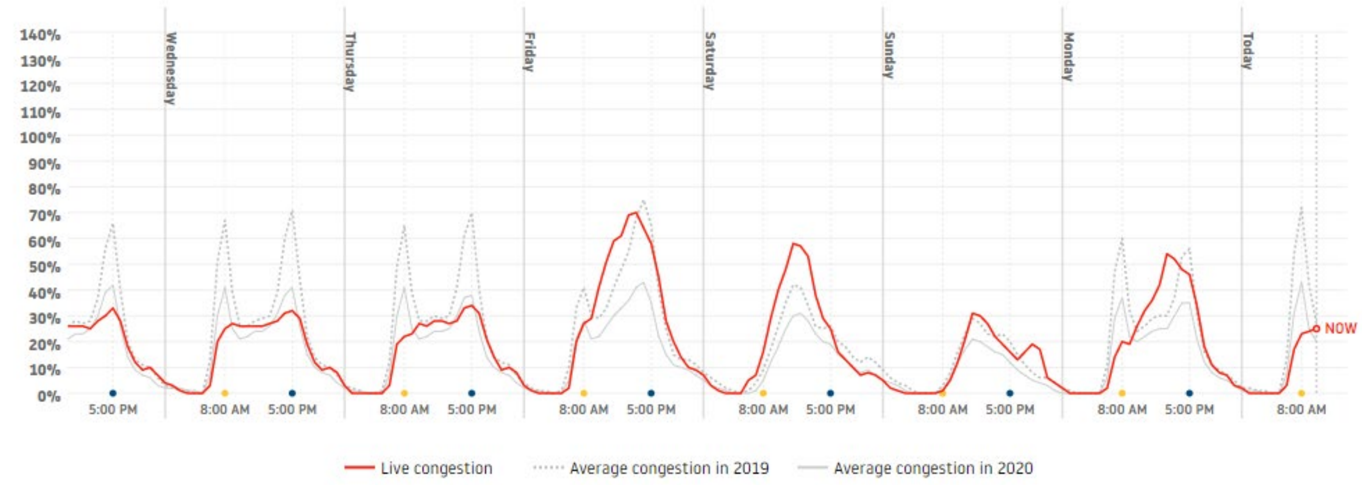
compared to baseline

TomTom Live Traffic

Bristol 27/07/21

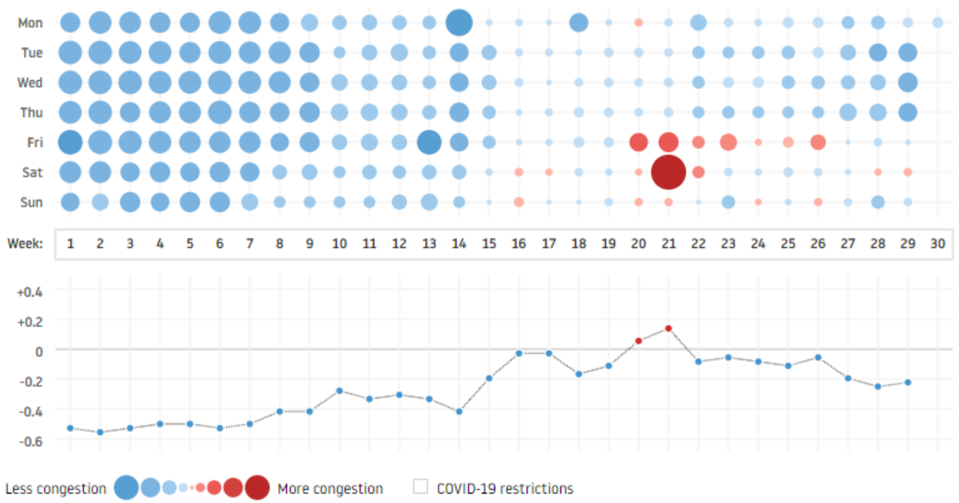
HOURLY CONGESTION LEVEL

Last 48 hours   **Last 7 days**



DAILY AND WEEKLY CONGESTION LEVEL

Average congestion   **Difference from 2019**



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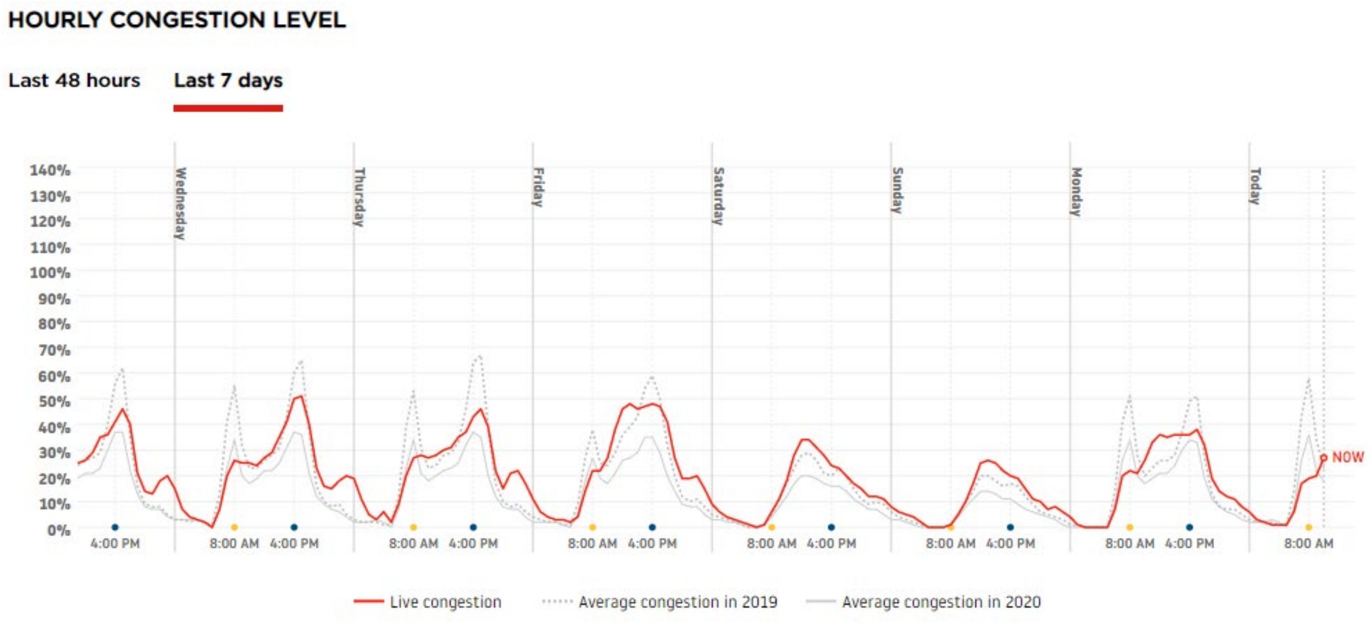
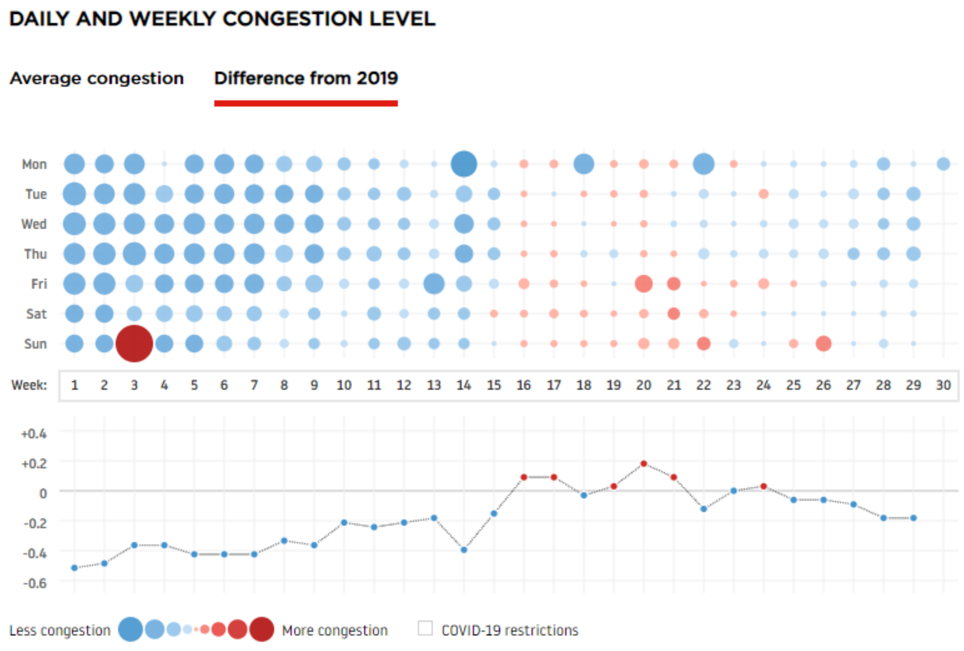
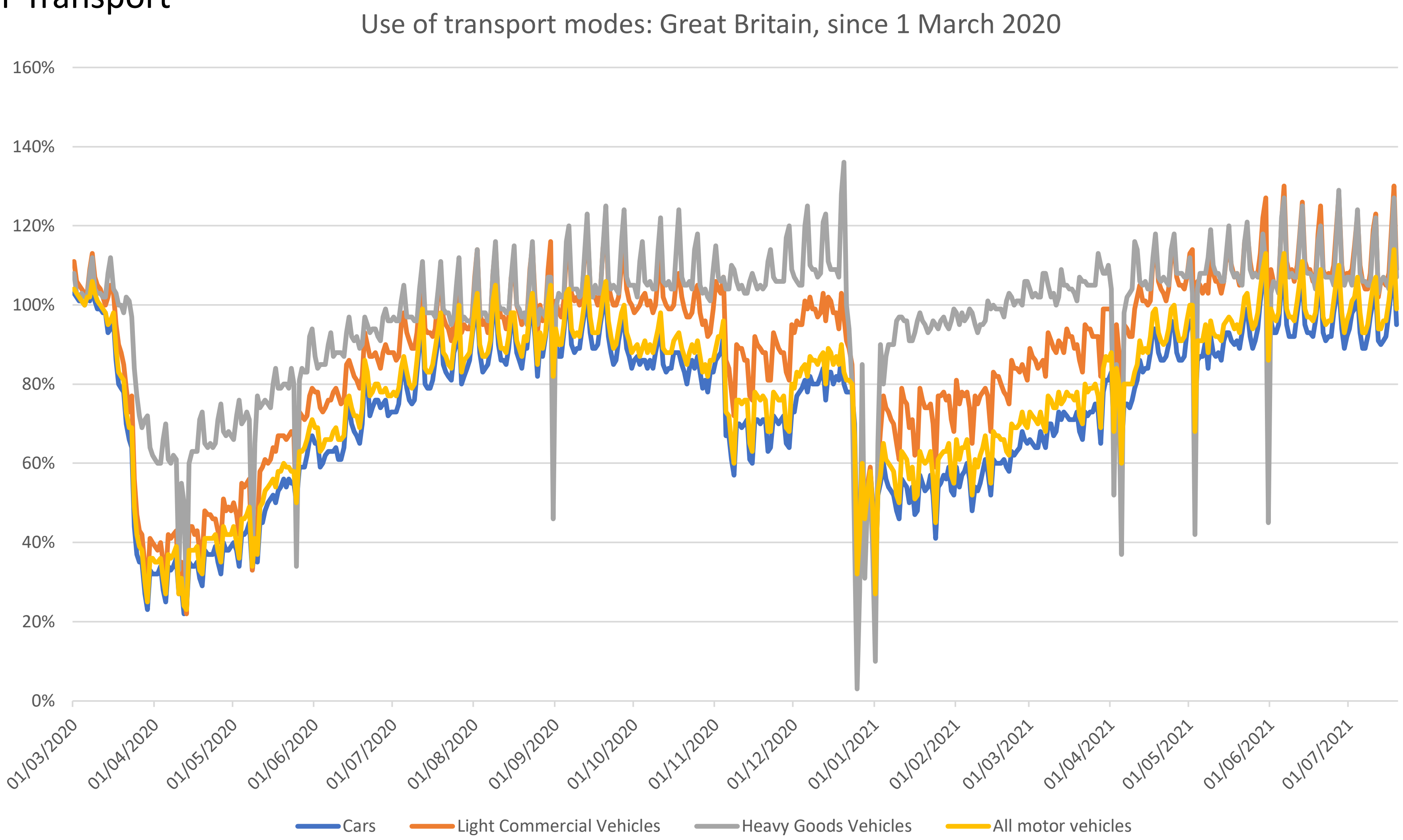
TomTom Live Traffic

Birmingham-Wolverhampton 27/07/21





Department for Transport



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Trend Tracker™

Paul Sell,
Associate Director,
Trend Tracker

"There is no doubt that traffic volumes continue to rise, as evidenced from the Apple mobility data, driven by restrictions being removed and a significant increase in staycations and UK holidays.

However, as can be seen in the Google and Tom-Tom data, traffic patterns are different. There are still many working from home or flexibly which has changed the 'rush-hour' and created congestion at different times of the day meaning predicting claims and repair volumes has become a common operational challenge for most in the supply chain.

We envisage a good month for repair volumes for July but not reaching the heights of June, impacted by the start of school holidays.

There are a number of other significant considerations across the sector currently. In the last few weeks **we have commented** on reported issues with new car production as a result of the **ongoing semi-conductor issues; disruption in the supply chain causing increases in costs of goods;** and the readiness of the industry for electrification with the launch of Thatcham Research's **EV Ready programme**. Not forgetting, of course, the continued rise of the **value of Used cars to an all-time high** which will no doubt be impacting total loss valuations/repair decisions across the industry.

In the forthcoming weeks we will release the next monthly update to our **subscribers** on vehicle sales, repair volumes and costs, as well as releasing our EV Readiness report which highlights 100% of respondents have had to invest in new equipment, training, and infrastructure to accommodate EVs with little return as yet.

In summary, it's a busy, challenging and exciting time for the sector."

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