Market Intelligence

22 September 2021

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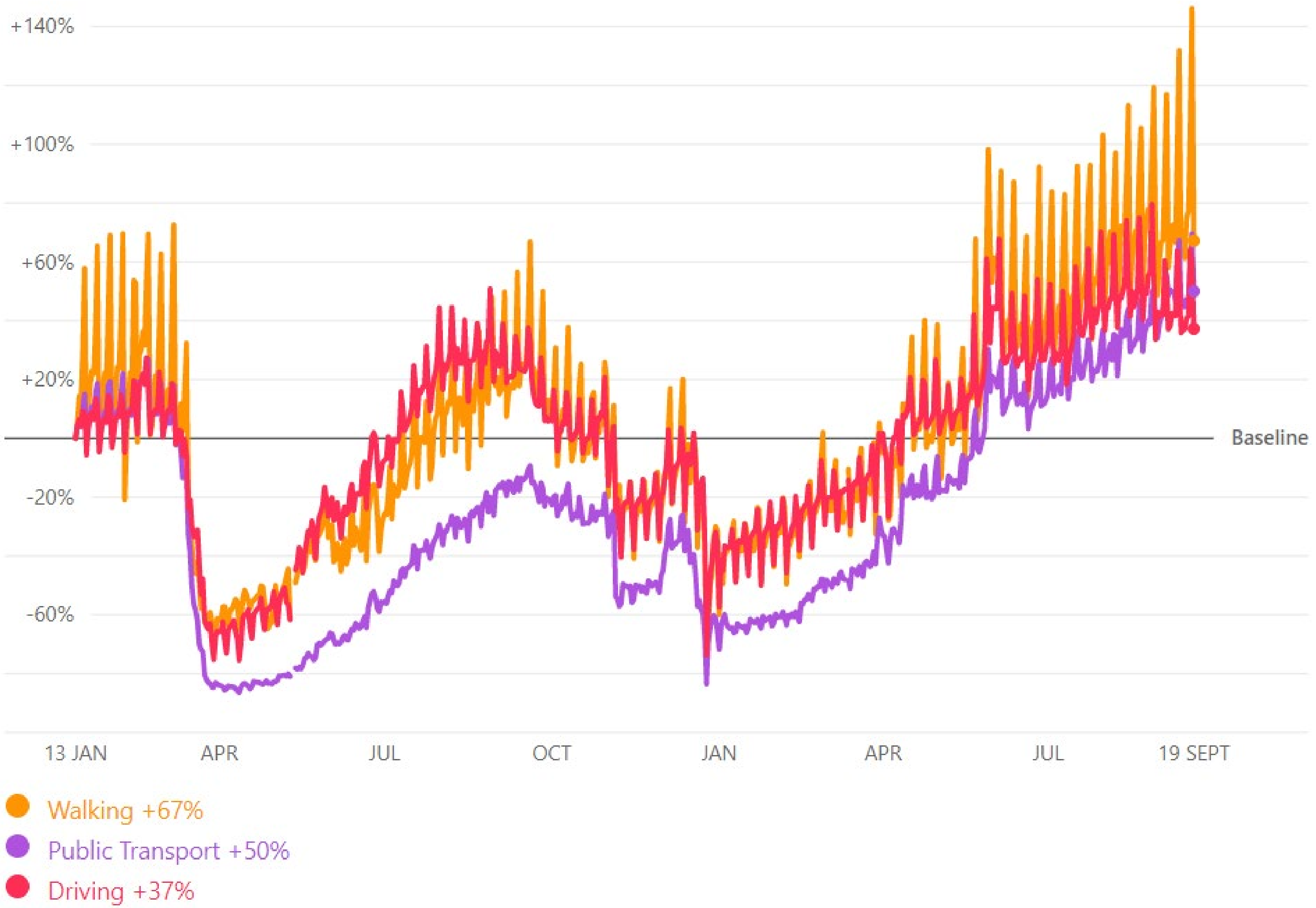
Apple Mobility Trends Report

UK 21/09/21



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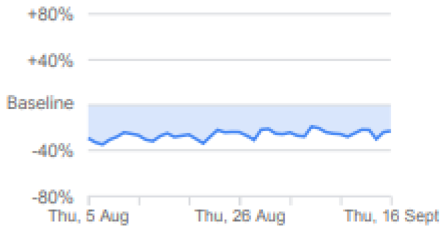
Google Covid-19 Community Mobility Report

Greater London 16/09/21

Retail and recreation

-23%

compared to baseline



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

Public transport

-37%

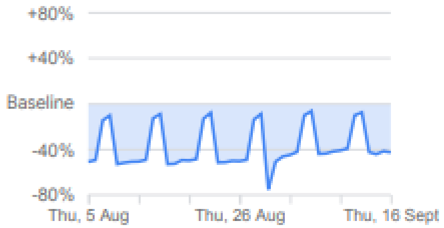
compared to baseline

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

Workplaces

-42%

compared to baseline



Mobility trends for places of work.

02/09/21

Retail and recreation

-24%

compared to baseline

Public transport

-43%

compared to baseline

Workplaces

-45%

compared to baseline

Google Covid-19 Community Mobility Report

Greater Manchester 16/09/21

02/09/21

Retail and recreation

-8%

compared to baseline

Public transport

-40%

compared to baseline

Workplaces

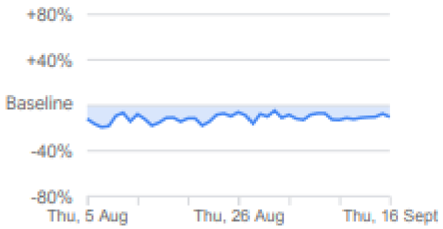
-37%

compared to baseline

Retail and recreation

-10%

compared to baseline



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

Public transport

-34%

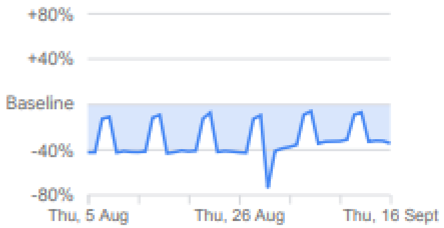
compared to baseline

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

Workplaces

-34%

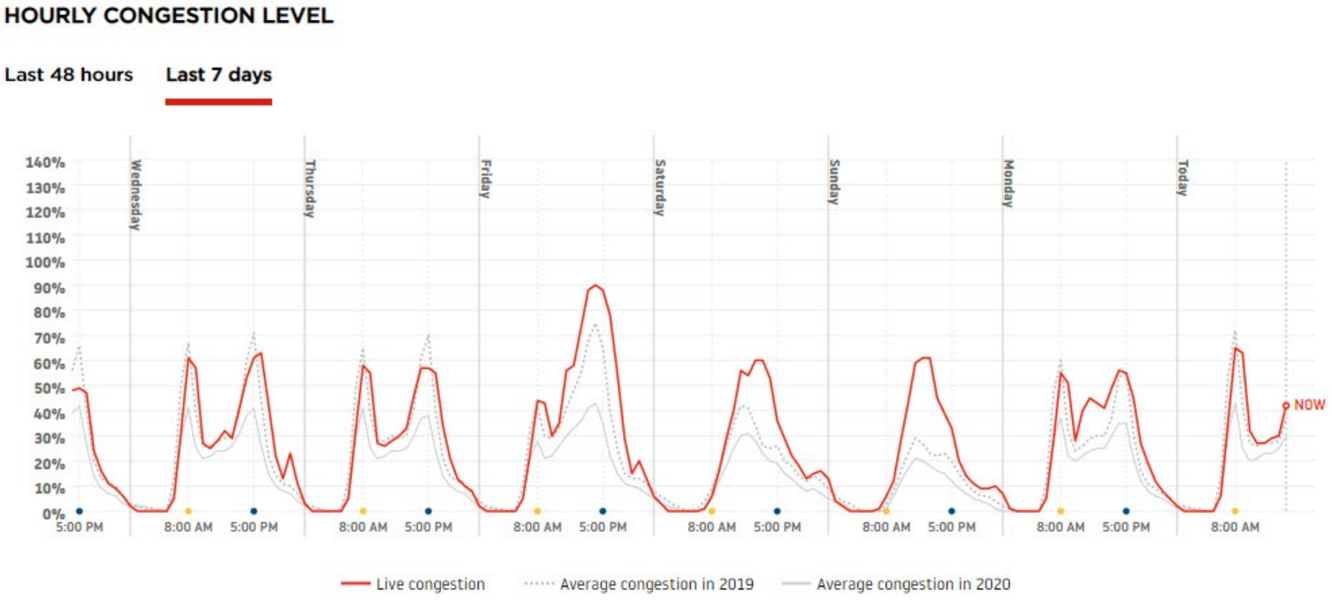
compared to baseline

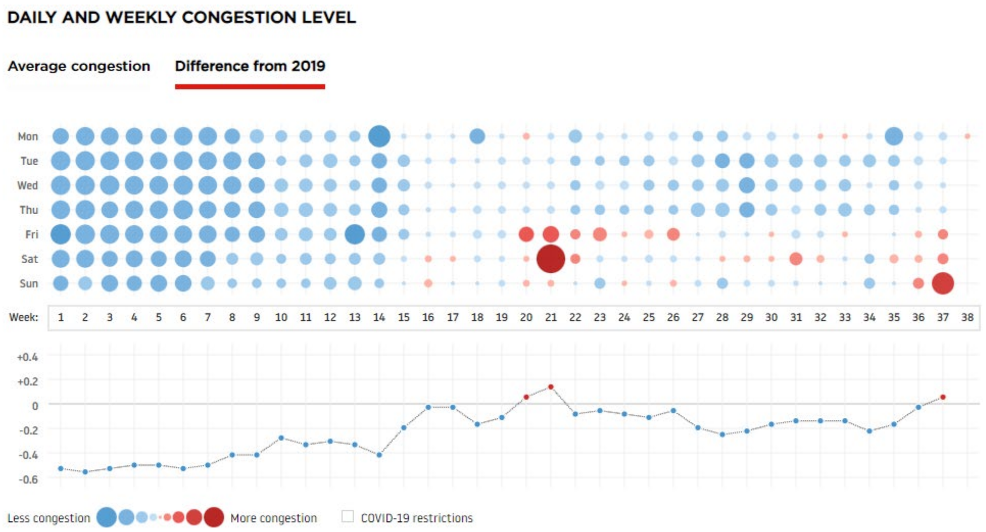


Mobility trends for places of work.

TomTom Live Traffic

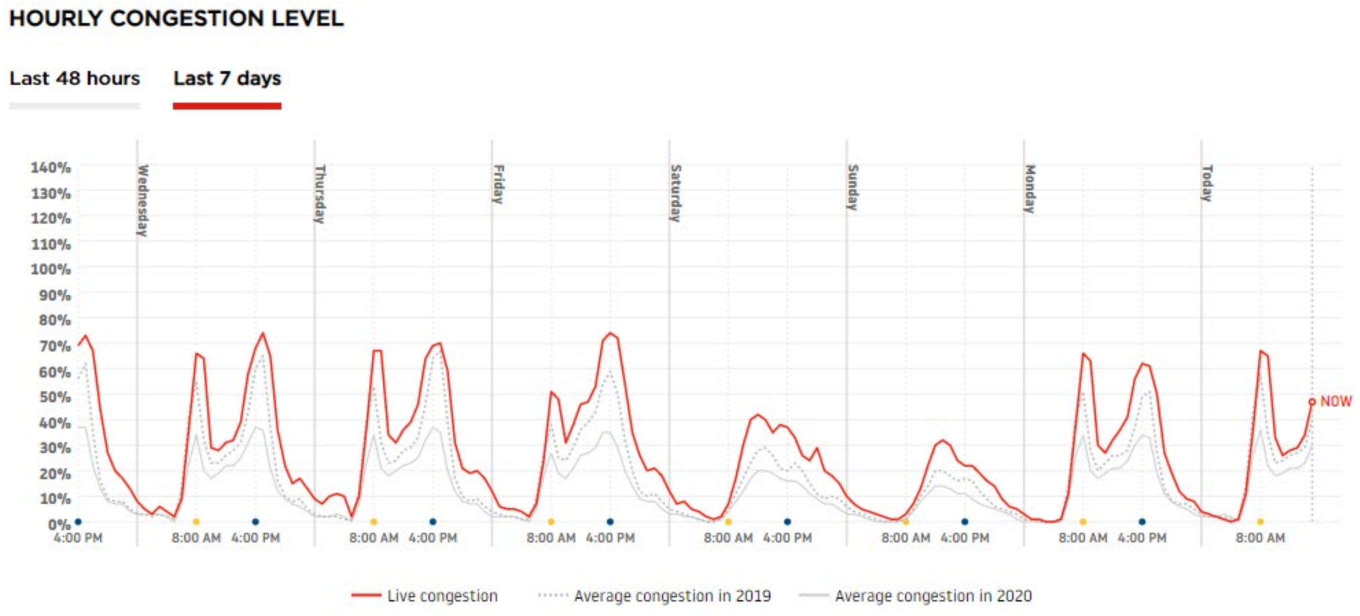
Bristol 21/09/21

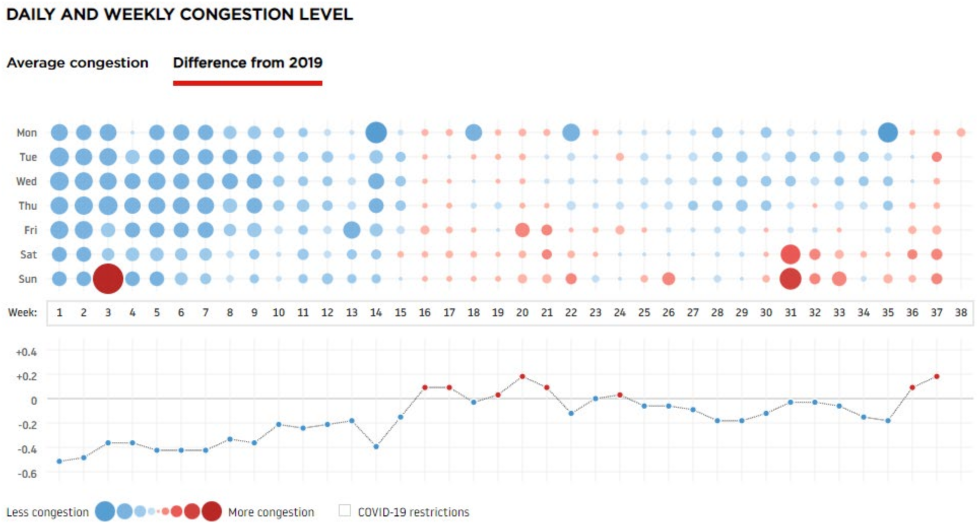




TomTom Live Traffic

Birmingham-Wolverhampton 21/09/21





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Trend Tracker™

Paul Sell,
Associate Director,
Trend Tracker

"As the mobility data shows, traffic patterns are reaching a consistent level. Google and Apple data has been consistent for a few weeks now and the TomTom data is highlighting more familiar daily congestion patterns. Plus we are now moving into Autumn, bringing with it the classic weather changes (eg misty mornings, bright sunshine and slippery roads).

After such a turbulent year in the body repair sector, these lead indicators would now suggest a turning of the tide and with it consistently higher volumes of repairs as we head into the winter months. I remain confident that September will bring the largest amount of repair estimates since pre-pandemic and it is on track to do just this (as at 21 September).

However, there are many headwinds still to navigate – some bringing opportunity, others more of a challenge;

- **The growth of EVs** – will we see more EVs than ICE vehicles sold in September for the first time?
- **The semi-conductor chip shortages** – impacting new vehicle production, pushing up used car values and reducing total losses. Is the industry seeing a greater number of larger repairs?
- **The increased demand on parts** – including green parts to 'save vehicles'. Could we see some supply chain delays or impacts as a result?
- **The change in Demand Vs Supply** – during the pandemic we had more supply than demand but this is starting to tip the other way? Are lead times and cycle times starting to stretch out? How is this being approached within repairer/work provider relationships?

The combination of increased volumes, headwinds in the market and winter months approaching is leading to a challenging time in the repair sector but one, I am sure, everyone prefers to have over the challenge last year of relying on government grants, the furlough scheme and bounce back loans."

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