Market Intelligence

6 October 2021

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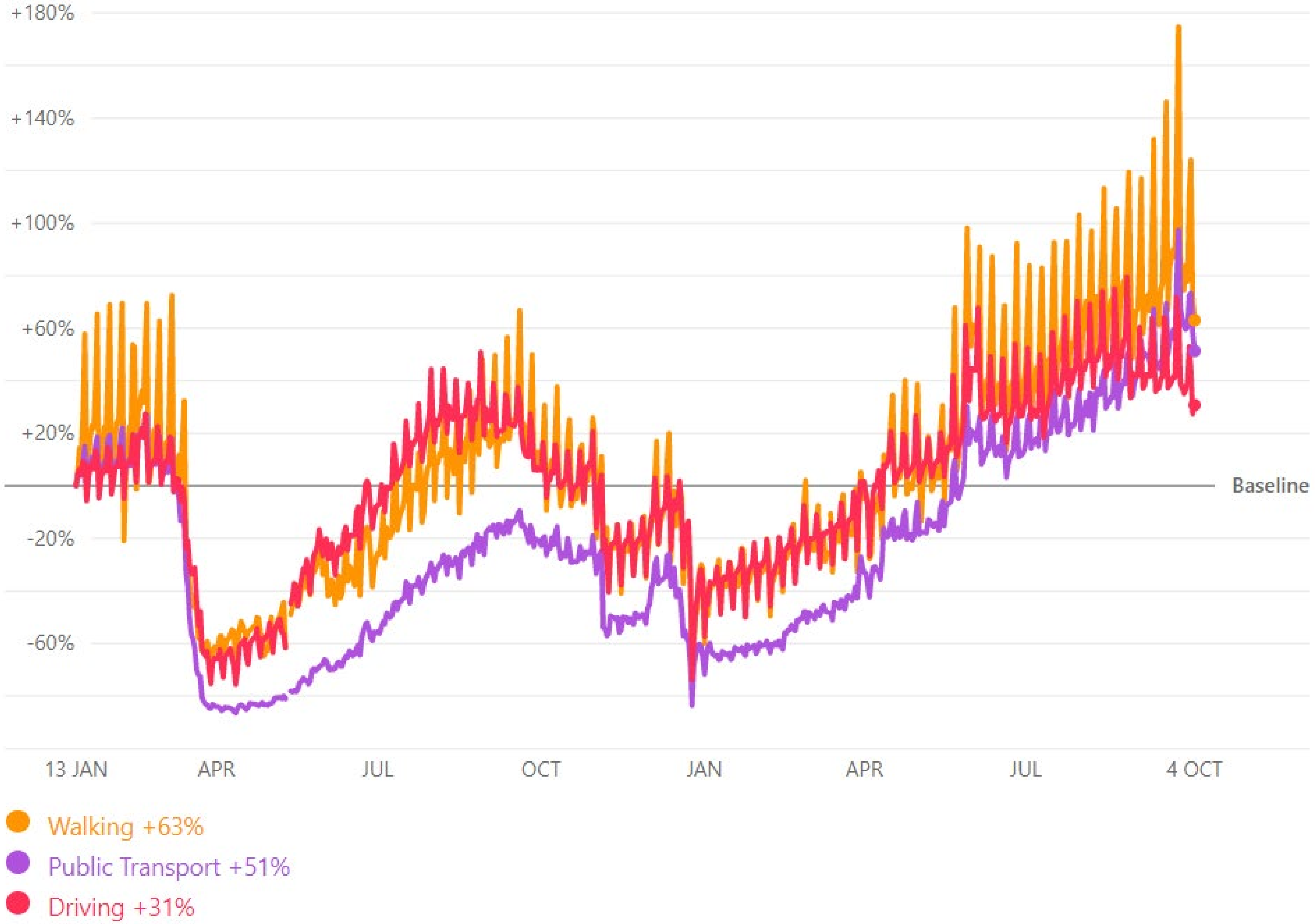
Apple Mobility Trends Report

UK 06/10/21



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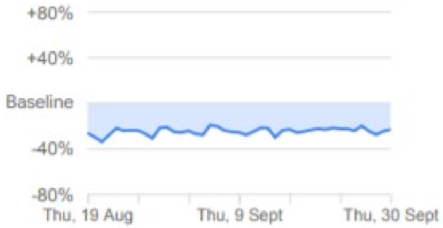
Google Covid-19 Community Mobility Report

Greater London 30/09/21

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

-35%

compared to baseline

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

Workplaces

-40%

compared to baseline

Mobility trends for places of work.

16/09/21

Retail and recreation

-23%

compared to baseline

Public transport

-37%

compared to baseline

Workplaces

-42%

compared to baseline

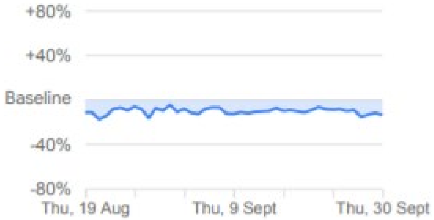
Google Covid-19 Community Mobility Report

Greater Manchester 30/09/21

Retail and recreation

-13%

compared to baseline



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

16/09/21

Retail and recreation

-10%

compared to baseline

Public transport

-34%

compared to baseline

Workplaces

-34%

compared to baseline

Public transport

-35%

compared to baseline

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

Workplaces

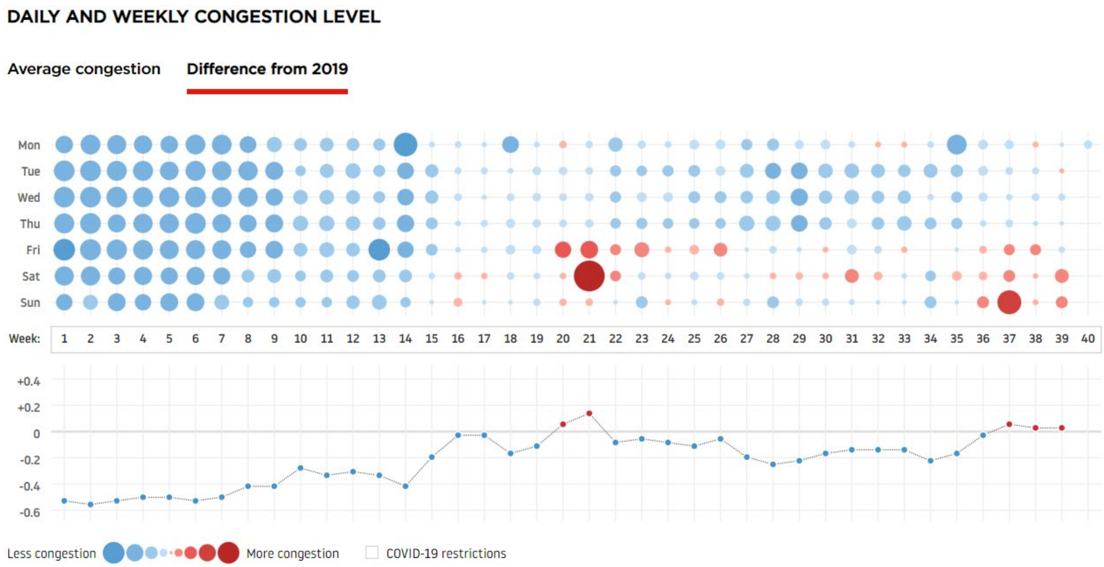
-33%

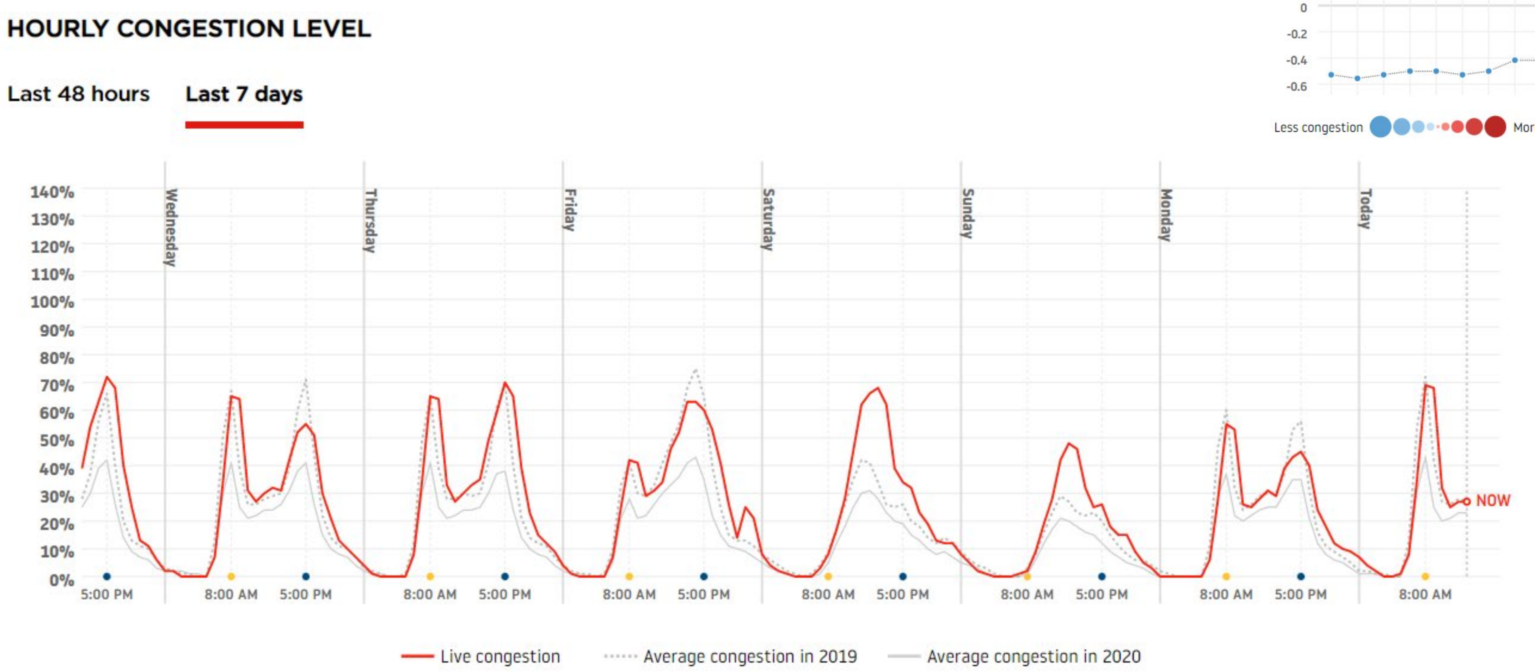
compared to baseline

Mobility trends for places of work.

TomTom Live Traffic

Bristol 05/10/21





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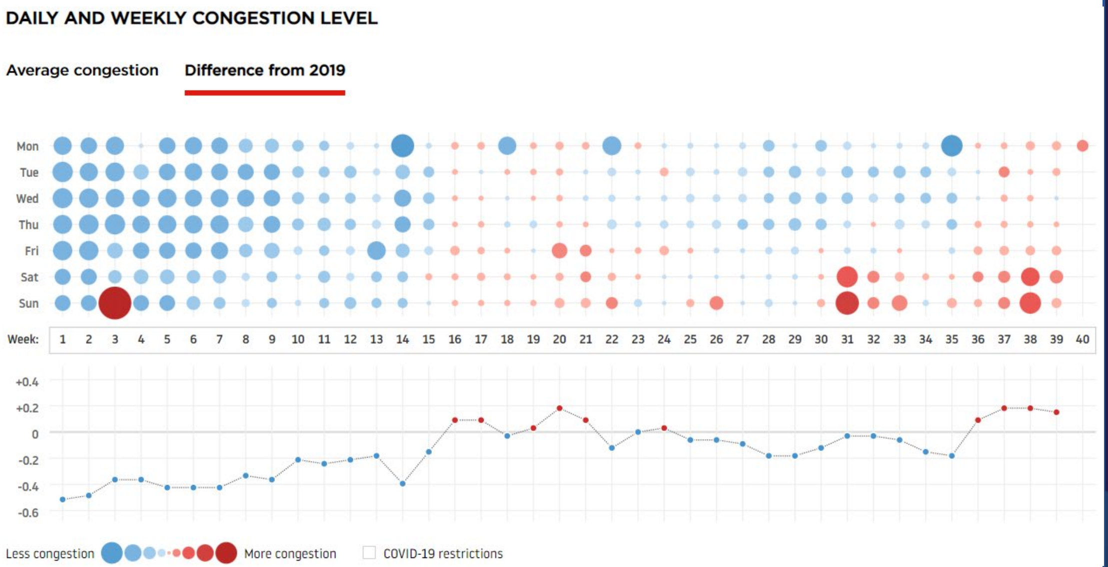
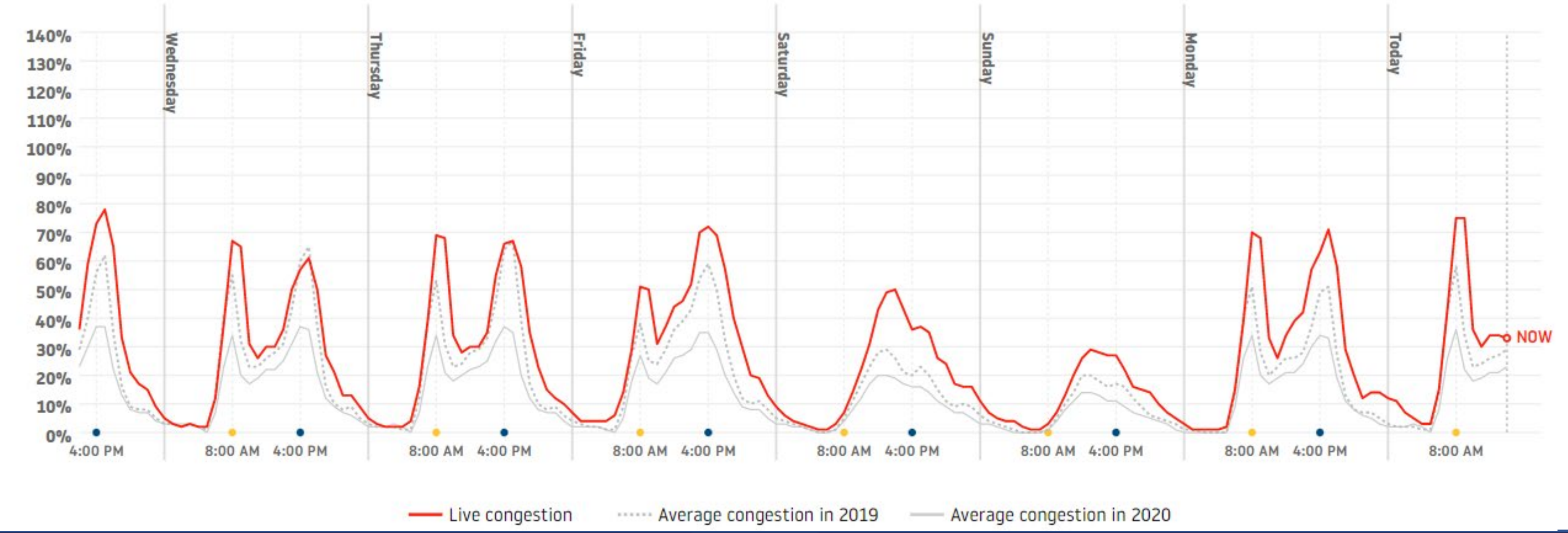
TomTom Live Traffic

Birmingham-Wolverhampton 05/10/21



HOURLY CONGESTION LEVEL

Last 48 hours   **Last 7 days**



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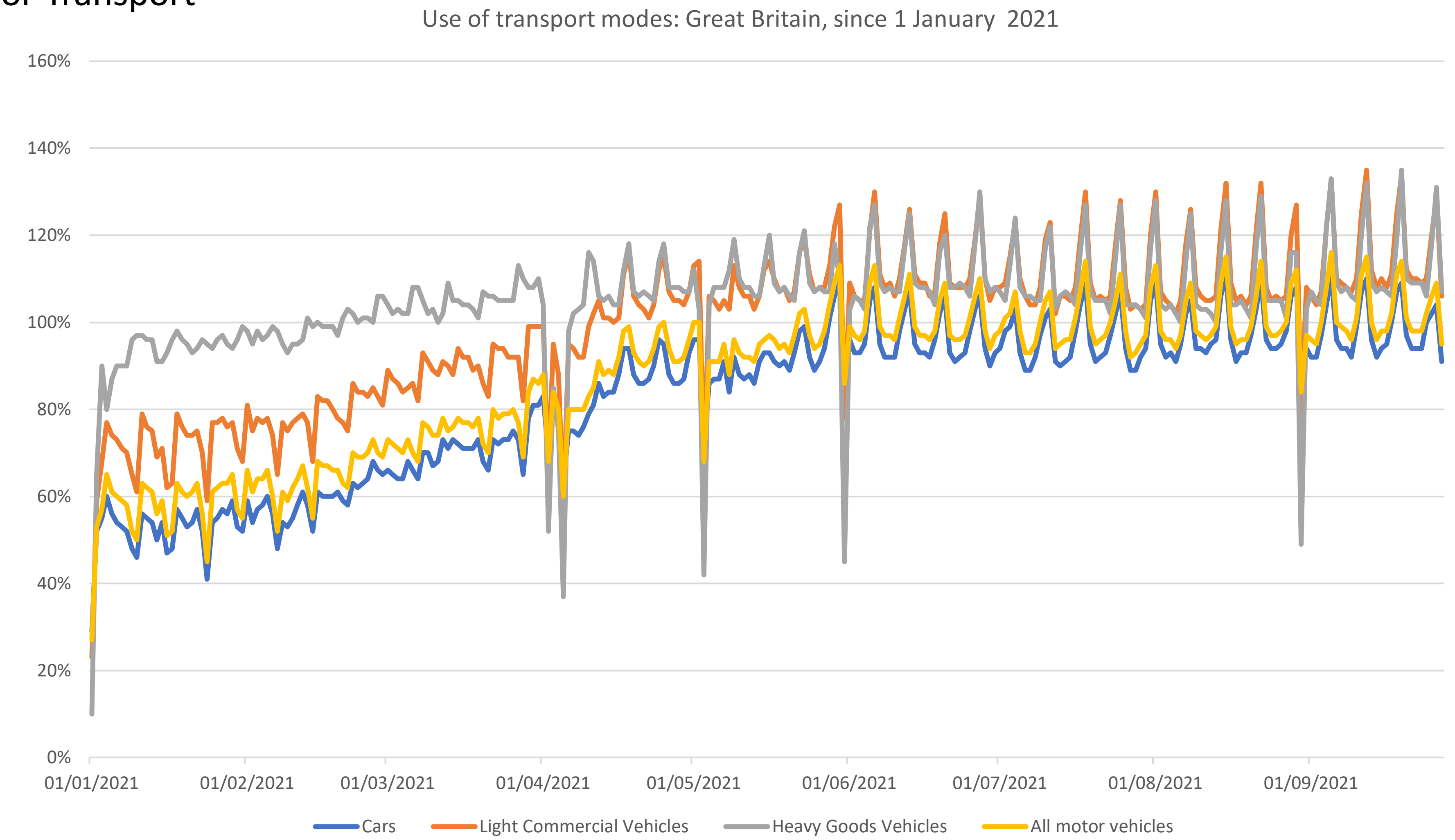

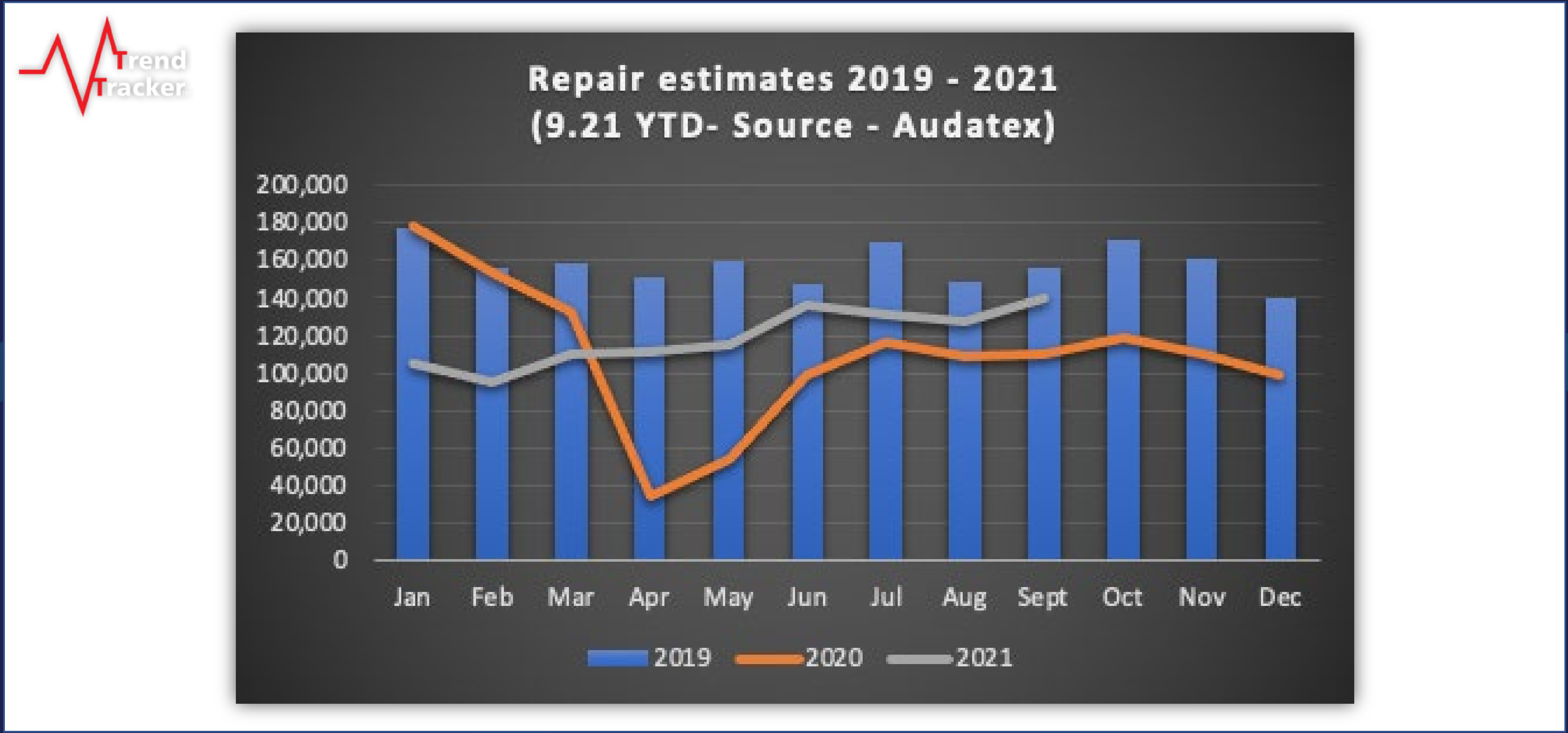

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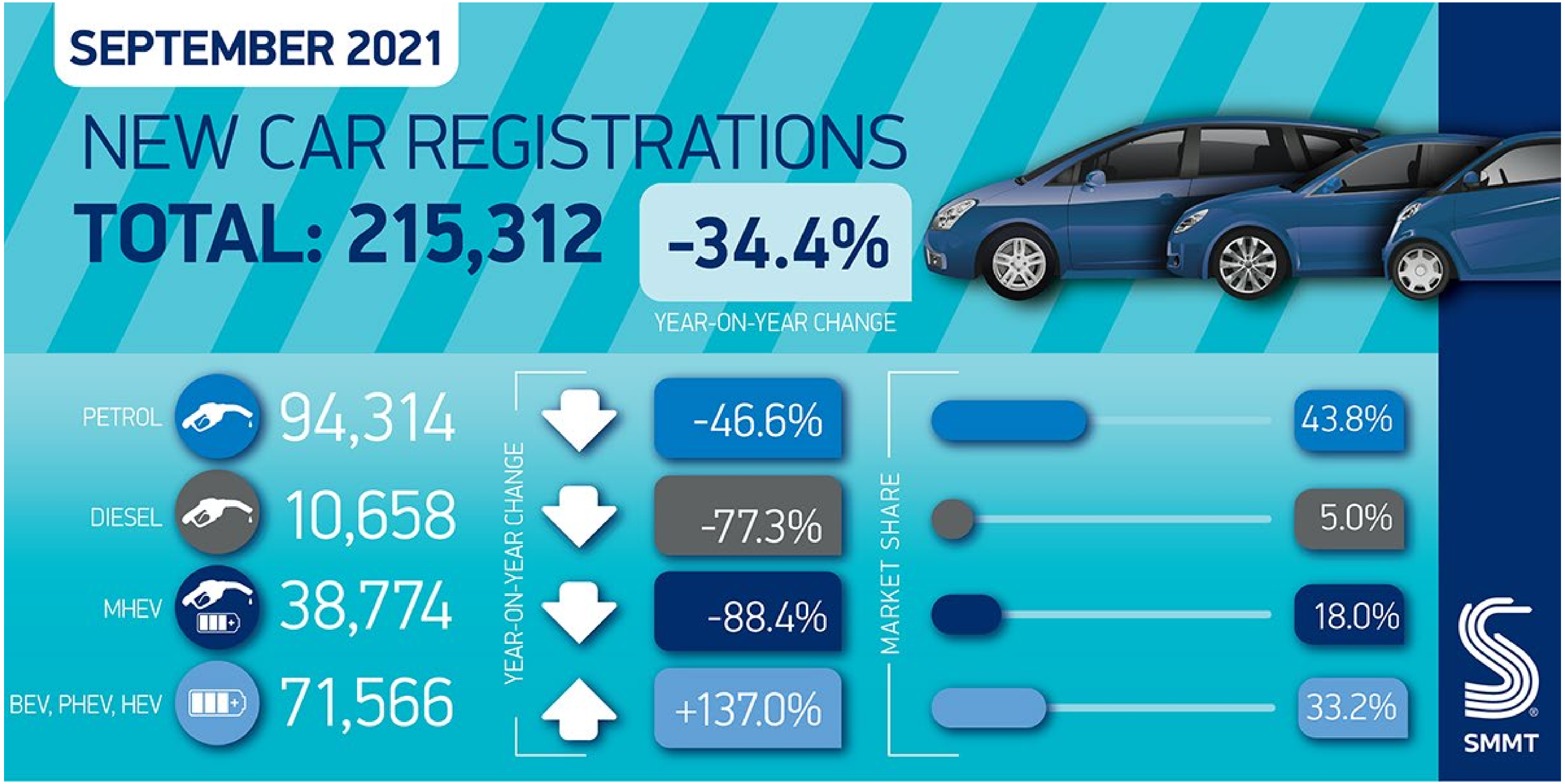

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Trend Tracker™

Paul Sell,
Associate Director,
Trend Tracker

"As the mobility data continues to show, traffic patterns are reaching a consistent level - Google and Apple data has been consistent for a few weeks now, and TomTom data is consistently showing daily congestion patterns returned. This will, no doubt, all have been affected in the last week with the fuel shortage, which we predict will reduce the expected number of accidents occurring in October.

However, in September we have seen two significant data points, both of which I predicted last month in the Market Intelligence Report:

- The **largest number of repairs since pre-pandemic (Feb 2020)** with just shy of 140k repair estimates completed in September
- A **greater number of new EV vehicles sold in September Vs ICE vehicles** with EV variants hitting 51% of new cars sold. A sea change we expect to continue.

There does, of course, continue to be many headwinds to navigate - some bringing opportunity, some more challenging:

- the growth of **used vehicle values** - unprecedented times with restricted supply of new vehicles and increased consumer demand for cars. Our research with cap hpi shows **the largest 'in- month' rise ever in September**, up 5.9% (£825 for a 3 year old, 60k mile used car). Will this continue to push more repair volume to avoid borderline total losses, with settlement values being driven up?
- therefore increased demand on parts, paint and consumables into a supply chain which has its own problems – driver and fuel shortages. Our research with our data partner Audatex shows **parts prices are already 5% higher in 2021 Vs 2020** and **September 2021 2% up Vs August 2021**. Will we start to see supply chain delays and longer key-to-key times as a result and/or continued price rises?
- a continued change in demand Vs supply in the repair sector. During the pandemic we had more supply than demand, but this has already swung the other way. Our research shows both **key-to-key and lead times increasing month-on-month over the last 3 months**. How will this impact courtesy car/mobility availability and overall customer satisfaction?

The combination of the increased volumes, various headwinds in the market and winter months approaching is laying the foundation for a challenging but very busy time in the repair sector."

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