Market Intelligence

15 December 2021

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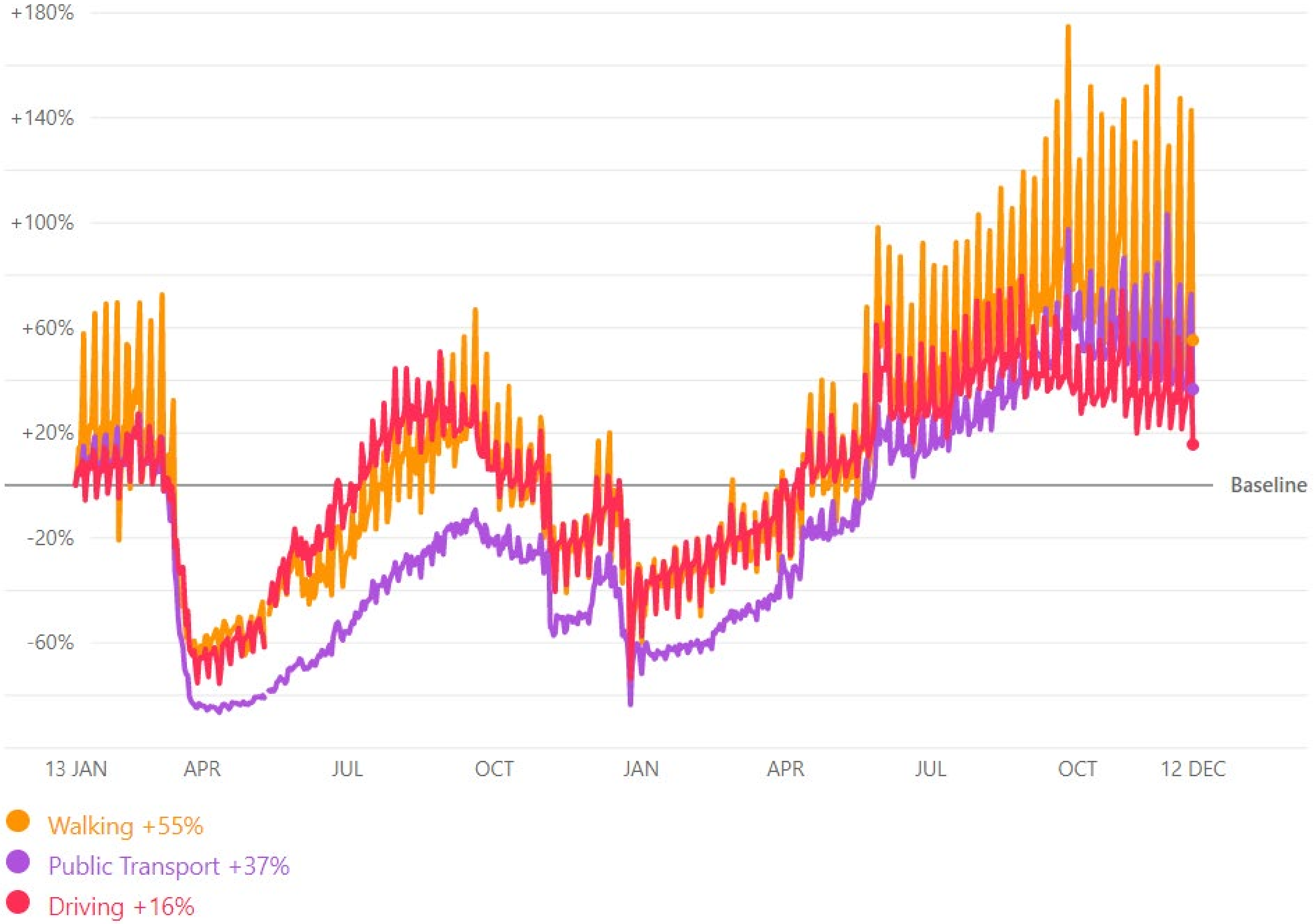
Apple Mobility Trends Report

UK 14/12/21



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Google Covid-19 Community Mobility Report

Greater London 14/12/21

Retail and recreation

-22%

compared to baseline

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

30/09/21

Retail and recreation

-23%

compared to baseline

Public transport

-35%

compared to baseline

Workplaces

-40%

compared to baseline

Public transport

-34%

compared to baseline

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

Workplaces

-35%

compared to baseline

Mobility trends for places of work.

Google Covid-19 Community Mobility Report

Greater Manchester 14/12/21

Retail and recreation

-5%

compared to baseline

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

Public transport

-27%

compared to baseline

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

Workplaces

-28%

compared to baseline

Mobility trends for places of work.

30/09/21

Retail and recreation

-13%

compared to baseline

Public transport

-35%

compared to baseline

Workplaces

-33%

compared to baseline

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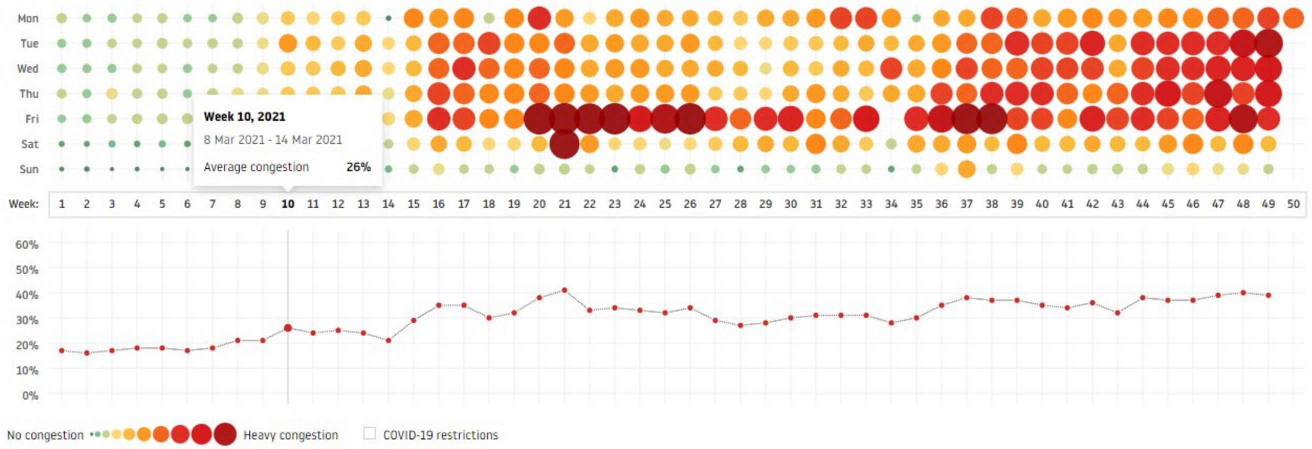
TomTom Live Traffic

Bristol 14/12/21

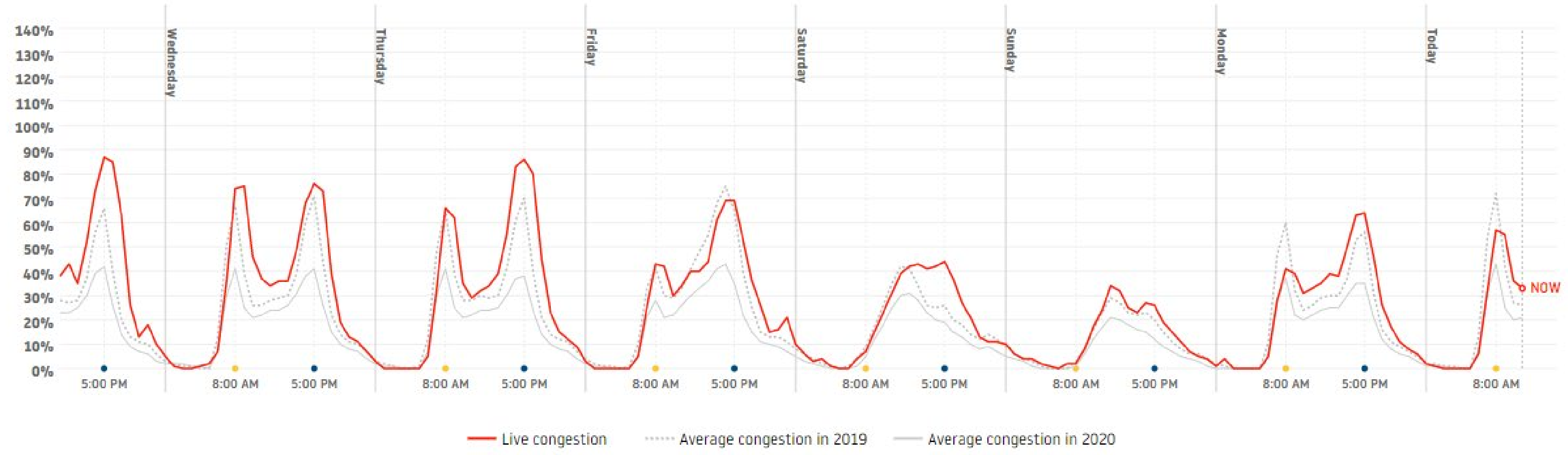
DAILY AND WEEKLY CONGESTION LEVEL

Average congestion | Difference from 2019



HOURLY CONGESTION LEVEL

Last 48 hours | Last 7 days



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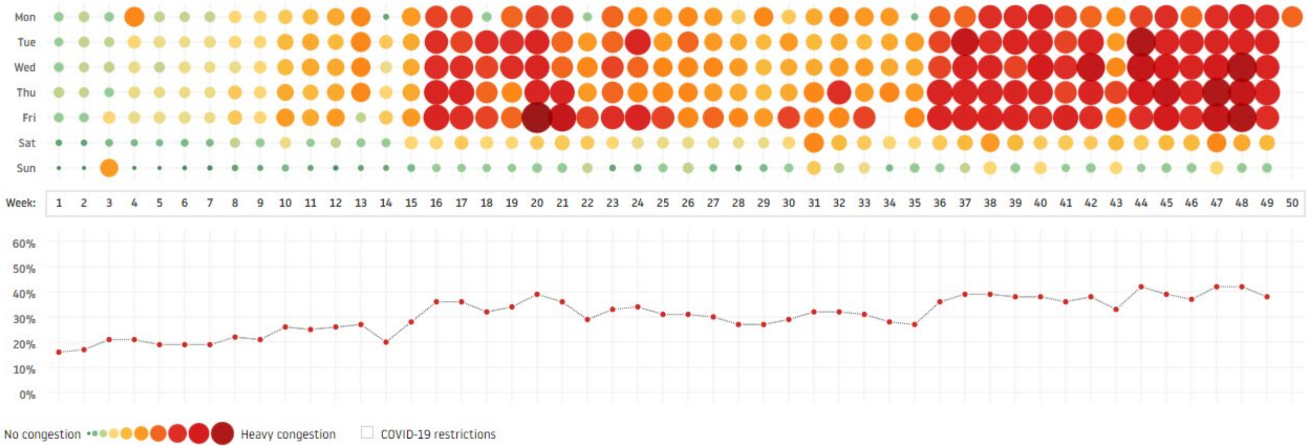
TomTom Live Traffic

Birmingham-Wolverhampton 14/12/21

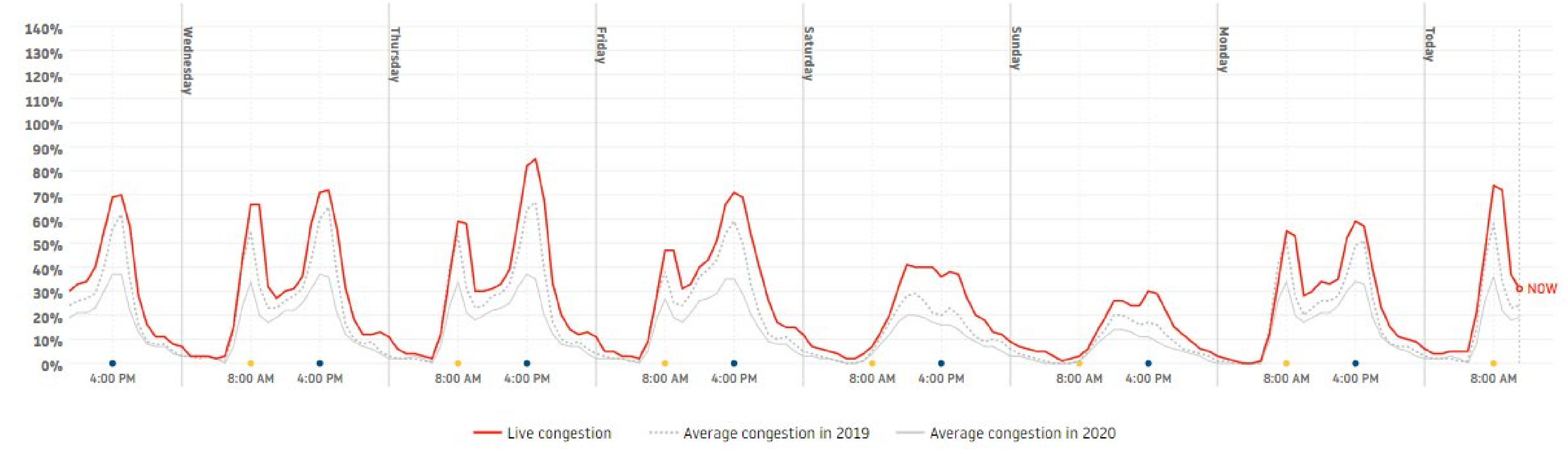
DAILY AND WEEKLY CONGESTION LEVEL

Average congestion Difference from 2019

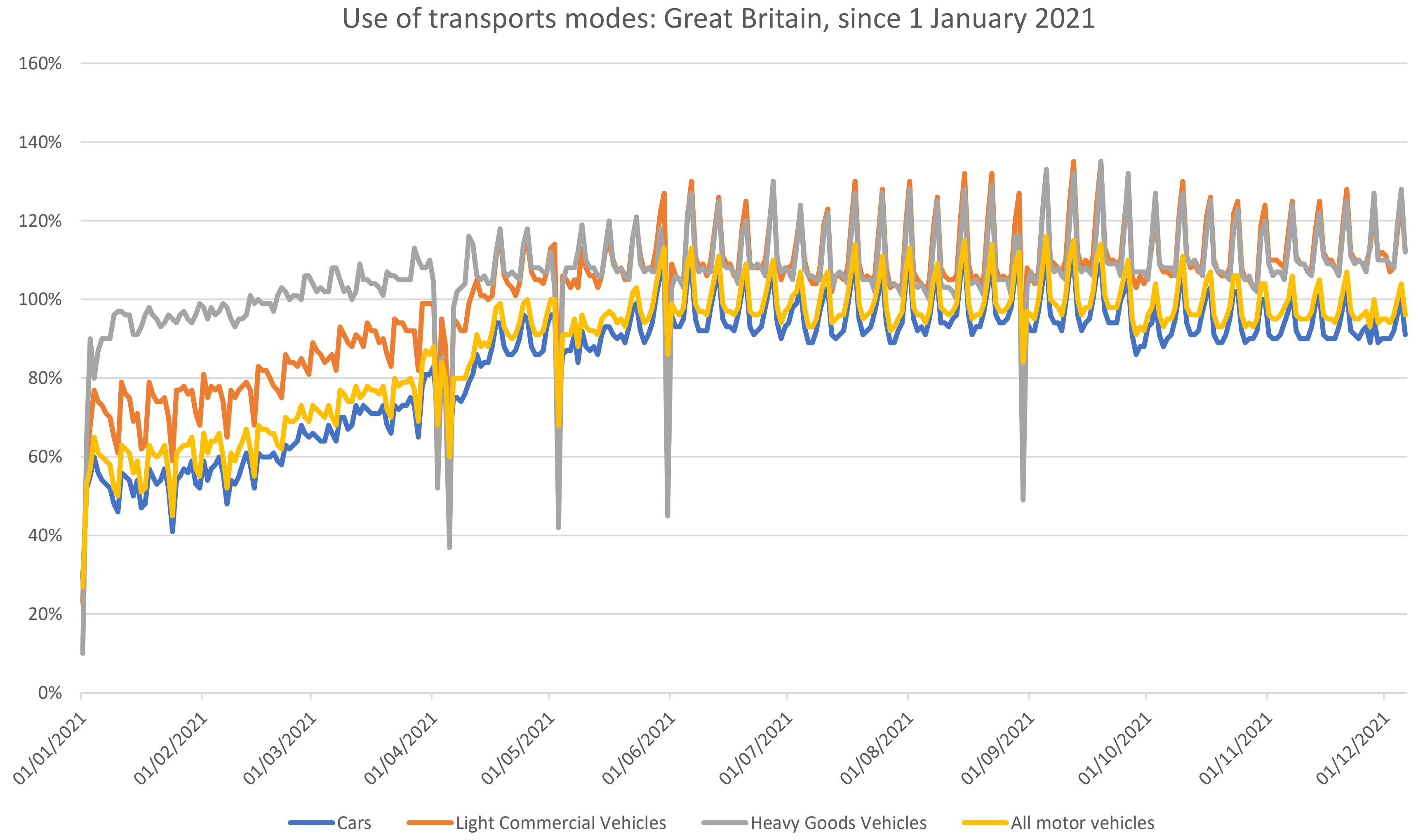


HOURLY CONGESTION LEVEL

Last 48 hours **Last 7 days**



Department for Transport



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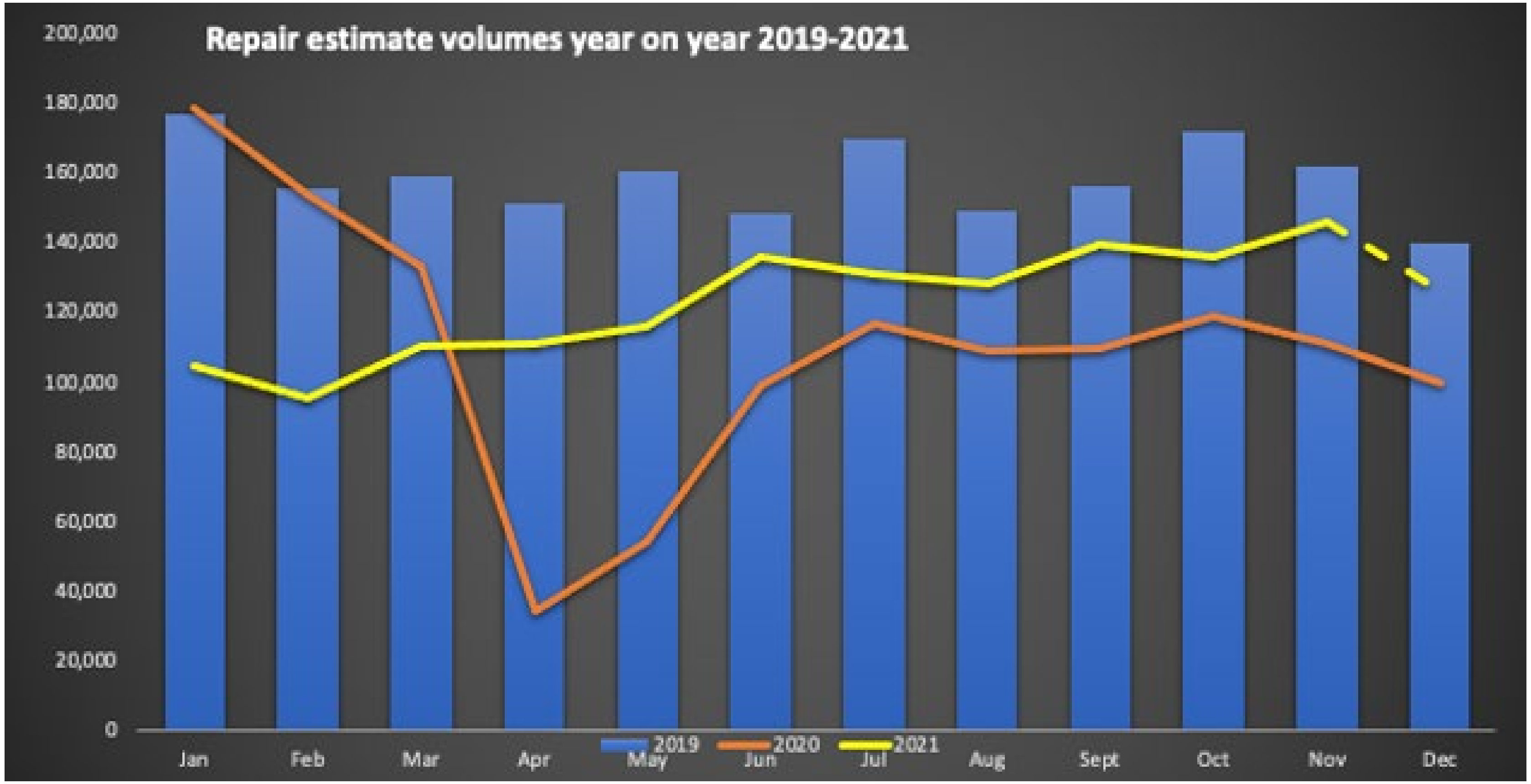
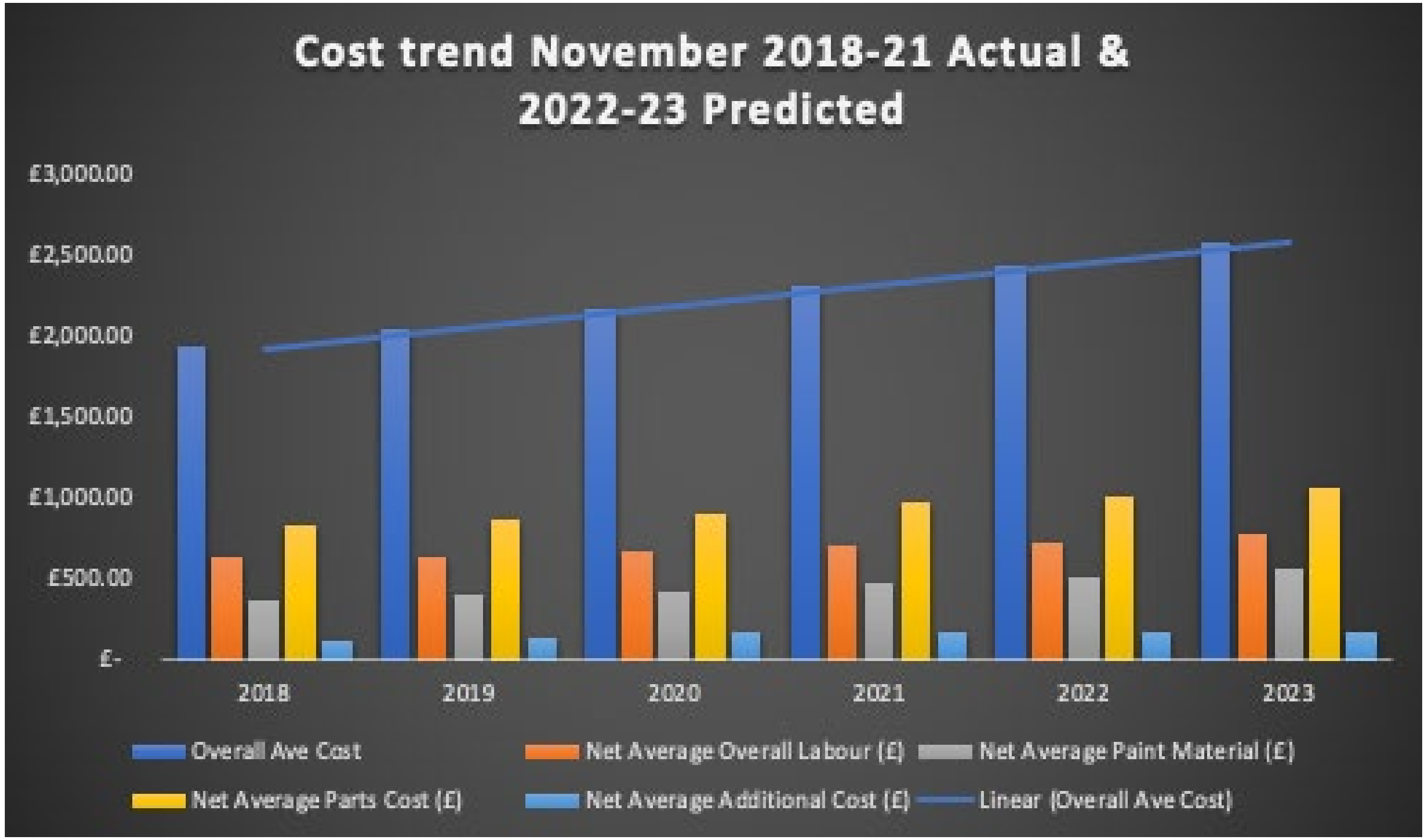
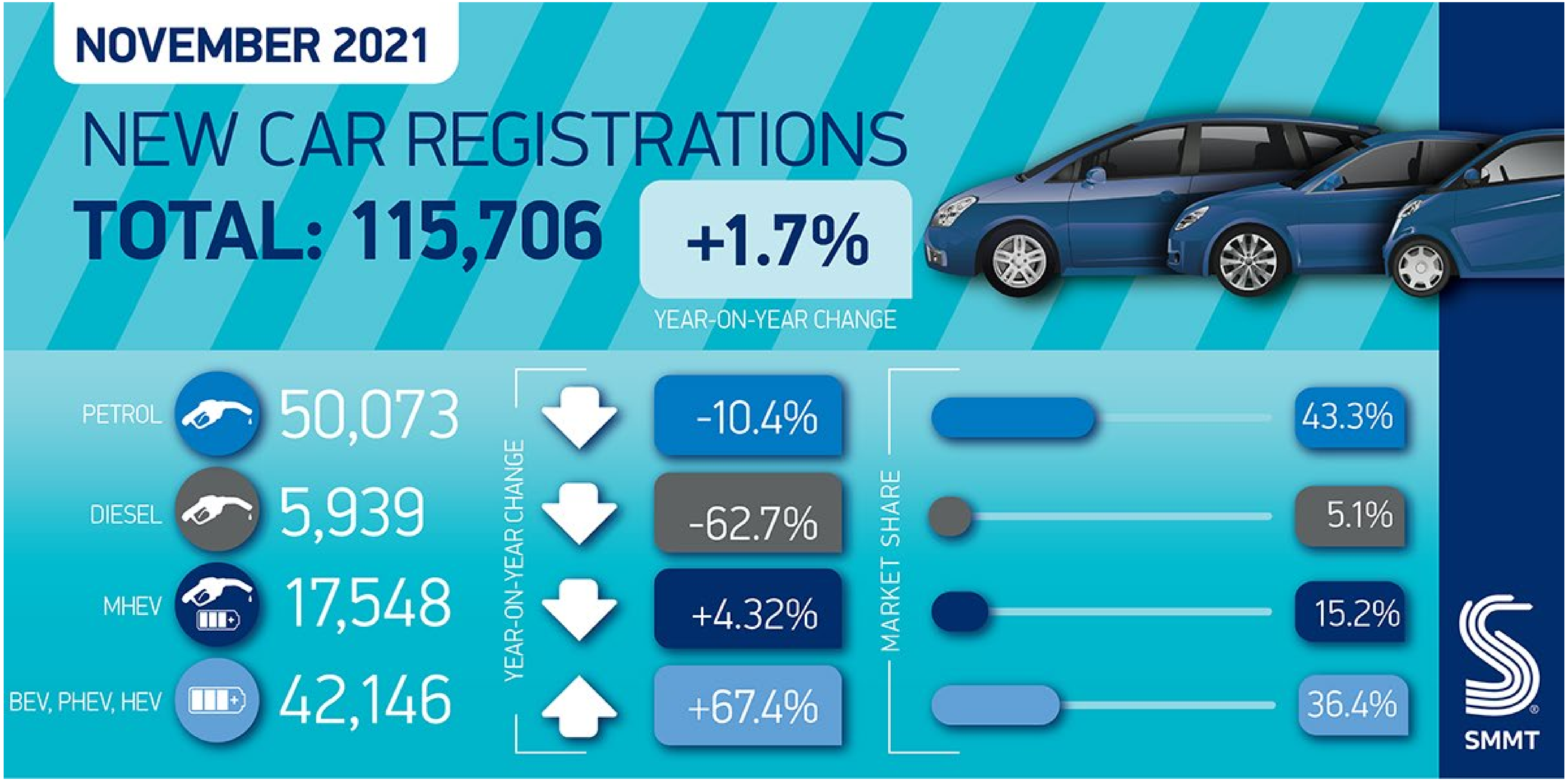


- Repair volumes reach 90% of 2019 in November
- Road congestion levels, traffic reports and fuel use all seem to be at more stable levels – is this the 'new normal' we talk about?
- December and January may have 'omicron' impact
- One million less repairs as a result of the pandemic



- Repair costs highest on record and predicted to grow further
- Paint increases as a result of the supply chain / raw material issues
- Parts increases due to increases in unit price and increased parts per job
- Labour increases due to increased cost of attracting and keeping staff, increased overheads & increased hours per job



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Trend Tracker™

Paul Sell,
Associate Director,
Trend Tracker

"What a difficult year 2021 has been, with no let up just yet as the Omicron variant emerges, rapidly accelerating the race between infection and vaccination.

Inflation, living costs and general costs of production are all rising and will continue to do so into 2022, presenting business challenges but also deepening impacts on those living in poverty and requiring help (here's a fantastic industry initiative - #ELBEH – doing its bit to help).

It's been another slow new car sales month but an improvement Vs October, and another strong month for LCVs and plug-in vehicles. There has also been a drop in used vehicle values following consecutive monthly increases since March, even so prices remain high and will for some time yet.

Increased demand on parts, paint and consumables in a supply chain still dealing with challenges including a shortage of drivers and component parts; scaled back new car production; and a lack of replacement cars is increasing lead times and creating local capacity challenges. In combination – parts, paint and overall average repair costs continue to rise month-on-month and will continue to climb into 2022.

Pending, is the arrival of a new pricing regulation for general insurance in January means new business and renewal prices have to be the same – removing the 'loyalty premium'. IT's a significant change in a motor insurance market where the average price is already the lowest in five years.

Overall, the pandemic significantly reduced accident frequency which we estimate culminated in one million less repairs across 2020/21 Vs 2019, resulting in £2.3bn reduction in claims spend/repair market value."

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