

Market Intelligence

14 April 2022

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CORPORATE PARTNERS

SOLERA
Vehicle Claims
Audatex



BMS



Copart

EMACS
Bodyshop Management Systems

Integral

enterprise
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INNOVATION
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MIRKA

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SHERWIN
WILLIAMS

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asTech
Driven by Repairify.

The Green
Parts
Specialists

INDASA

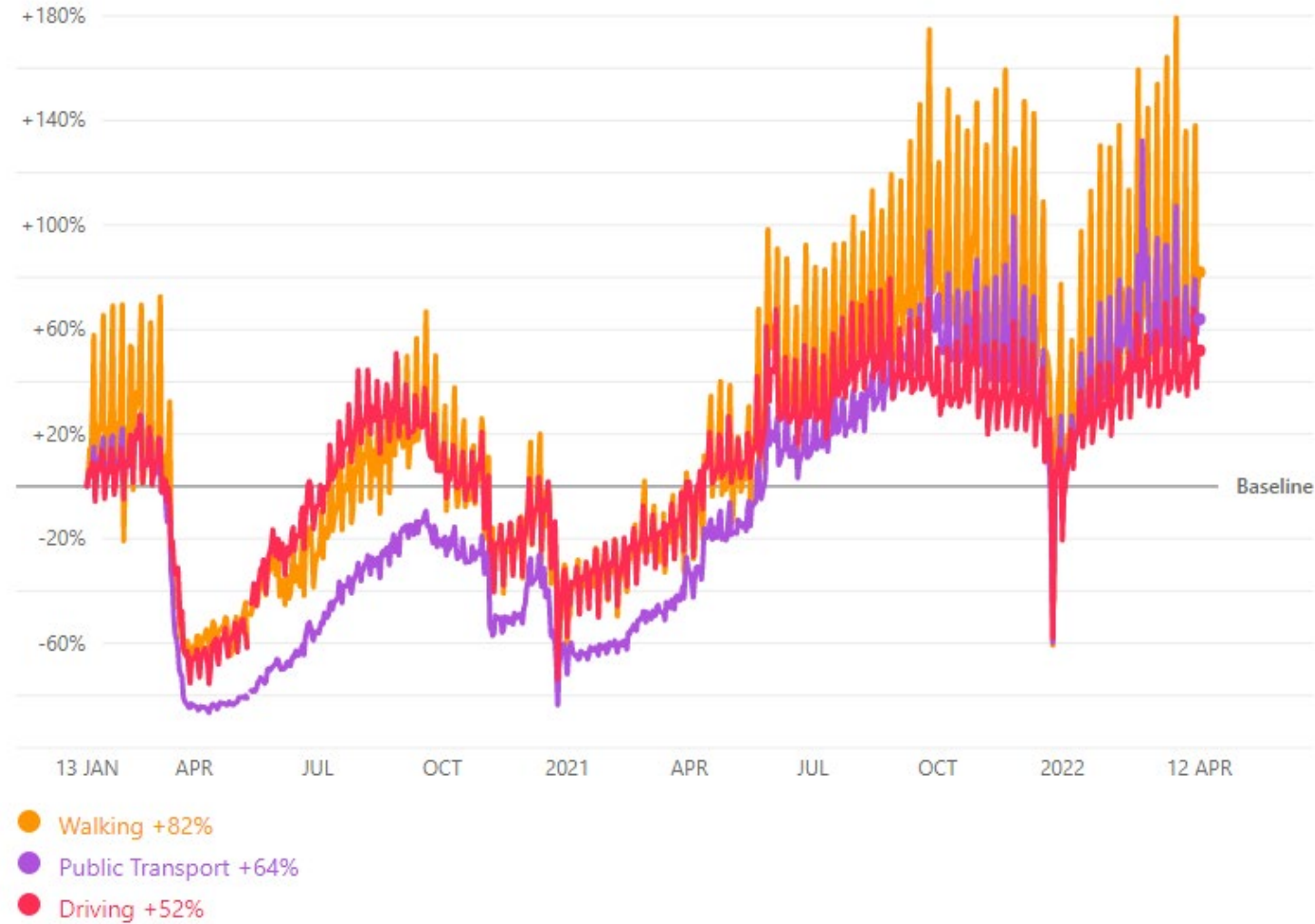
PRASCO^{UK}

In association with:



Apple Mobility Trends Report

UK 14/04/22



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In association with:



Google Covid-19 Community Mobility Report

Greater London 10/04/22

Retail and recreation

-24%

compared to baseline



Public transport

-23%

compared to baseline



Workplaces

-9%

compared to baseline



04/03/22

Retail and recreation

-29%

compared to baseline

Public transport

-35%

compared to baseline

Workplaces

-35%

compared to baseline

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In association with:



Google Covid-19 Community Mobility Report

Greater Manchester 10/04/22

04/03/22

Retail and recreation

-12%

compared to baseline

Public transport

-29%

compared to baseline

Workplaces

-27%

compared to baseline

Retail and recreation

-9%

compared to baseline



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

Public transport

-7%

compared to baseline



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

Workplaces

-9%

compared to baseline



Mobility trends for places of work.

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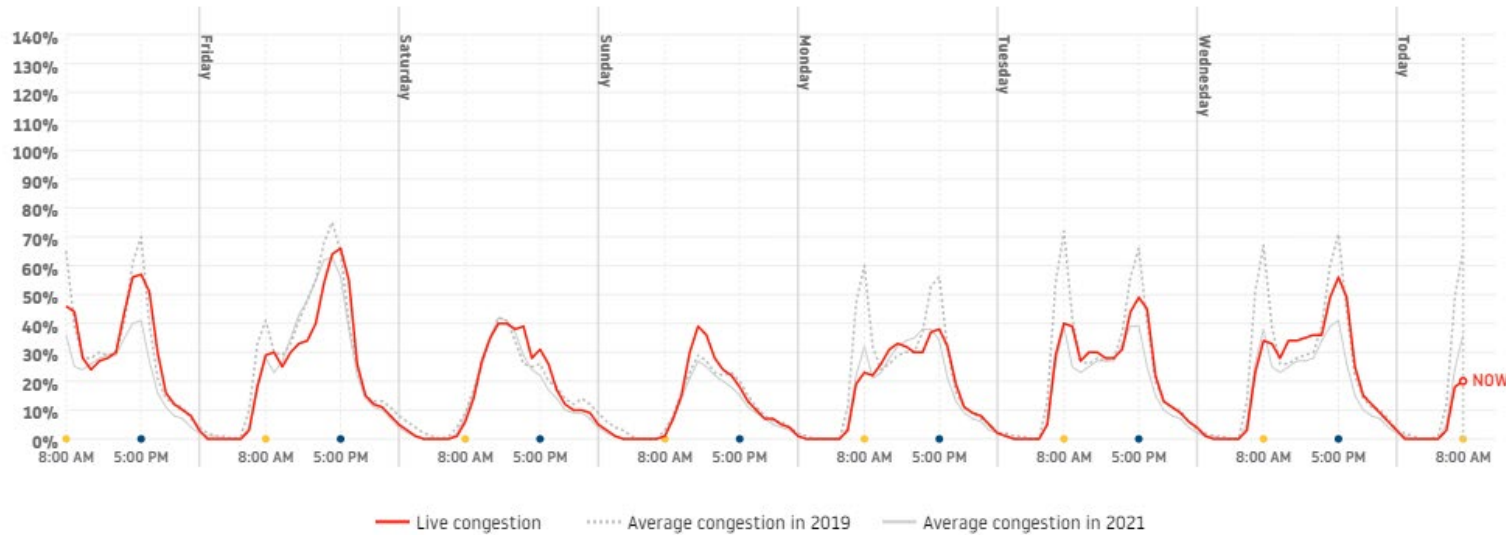


TomTom Live Traffic

Bristol 14/04/22

HOURLY CONGESTION LEVEL

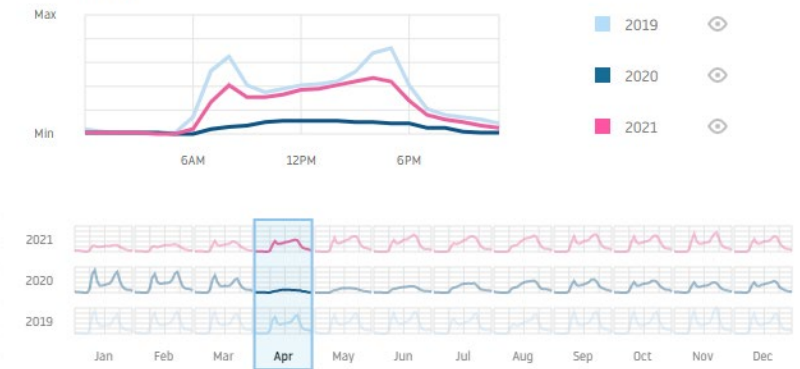
Last 48 hours Last 7 days



CHANGES IN WORKING DAYS TRAVEL PATTERNS IN 2019-2021

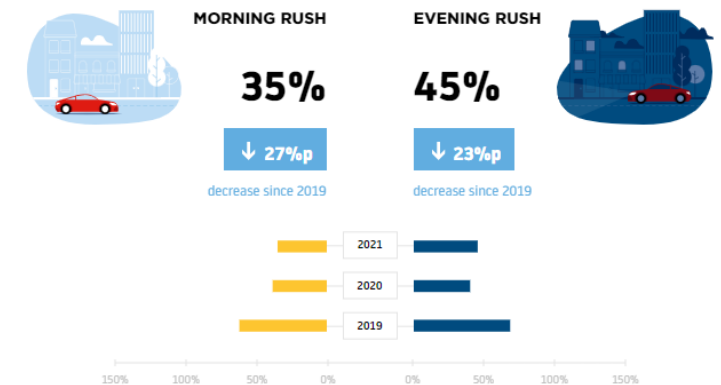
What did the traffic on an average working day look like each month across the years?

April



WEEKDAY RUSH HOURS

How congested was Bristol during rush hour?



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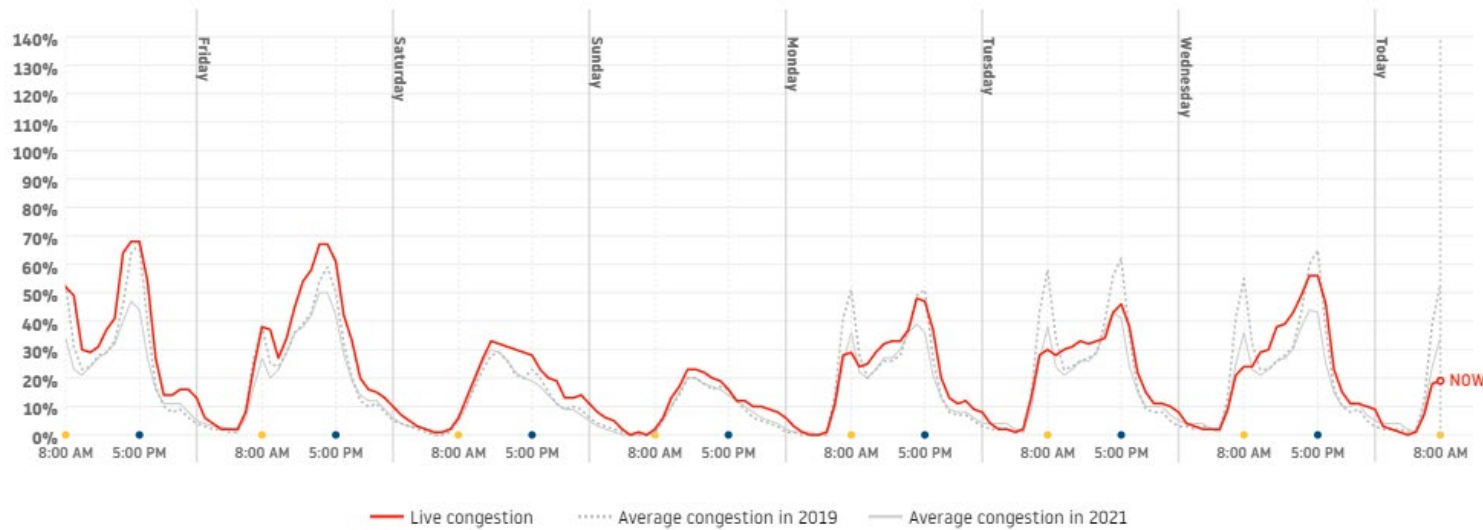


TomTom Live Traffic

Birmingham-Wolverhampton 14/04/22

HOURLY CONGESTION LEVEL

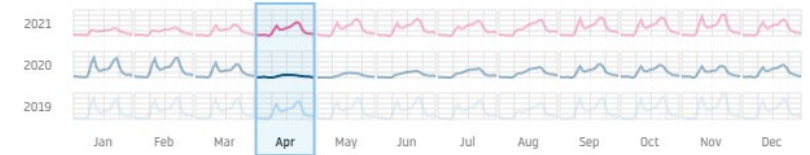
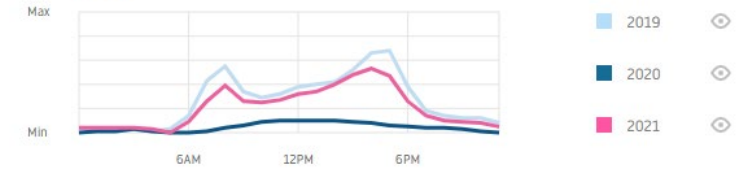
Last 48 hours **Last 7 days**



CHANGES IN WORKING DAYS TRAVEL PATTERNS IN 2019-2021

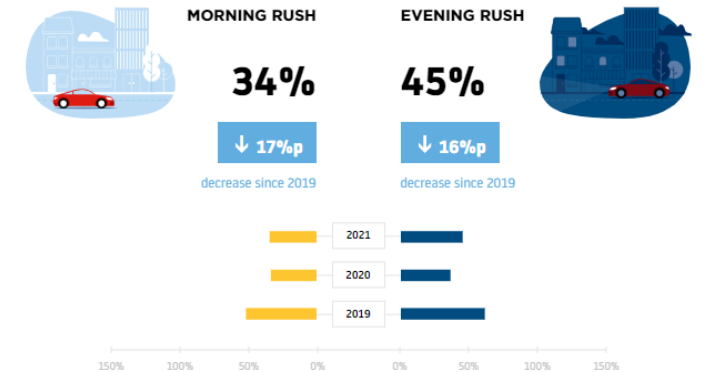
What did the traffic on an average working day look like each month across the years?

April



WEEKDAY RUSH HOURS

How congested was Birmingham-Wolverhampton during rush hour?



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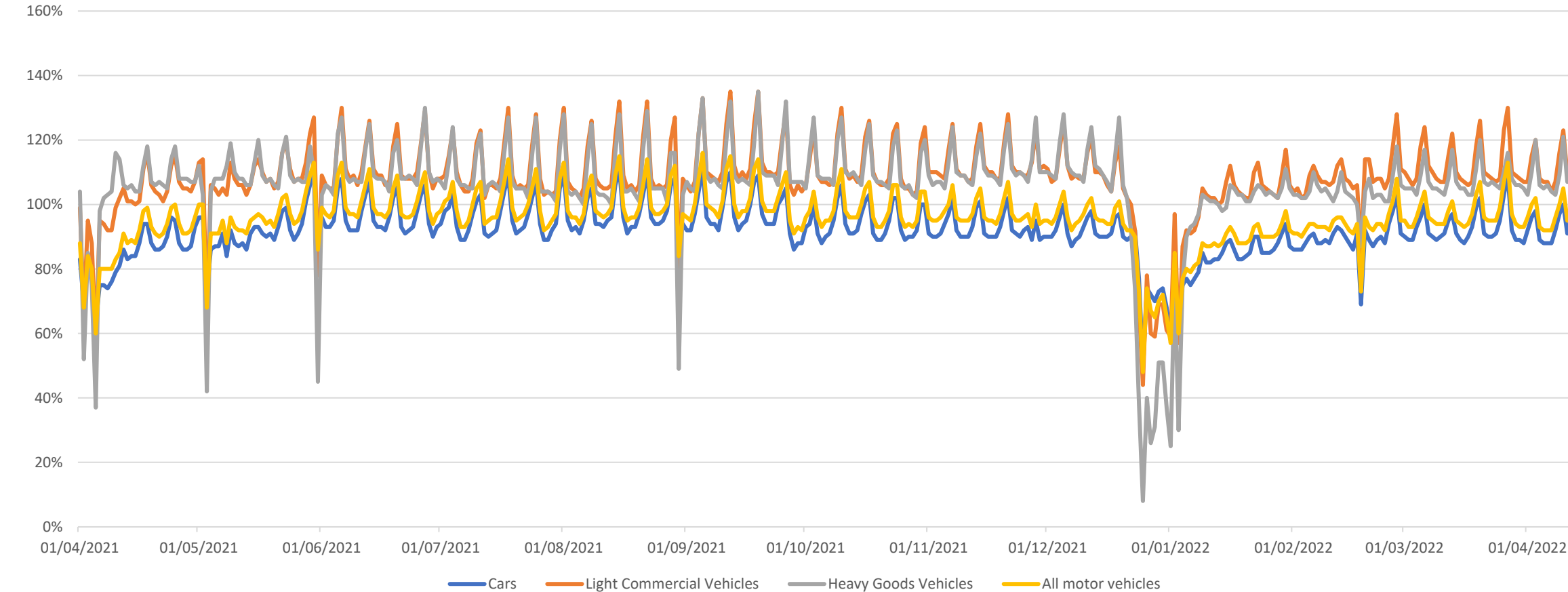
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Use of transport modes:
Great Britain, since 1 April 2021



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MARCH 2022

NEW CAR REGISTRATIONS

TOTAL: 243,479

-14.3%

YEAR-ON-YEAR CHANGE



PETROL
102,349



YEAR-ON-YEAR CHANGE
-25.6%

DIESEL
13,756



YEAR-ON-YEAR CHANGE
-55.2%

MHEV
44,285



YEAR-ON-YEAR CHANGE
-19.1%

HEV
27,737



YEAR-ON-YEAR CHANGE
+28.4%

BEV
39,315



YEAR-ON-YEAR CHANGE
+78.7%

PHEV
16,037



YEAR-ON-YEAR CHANGE
-7.5%



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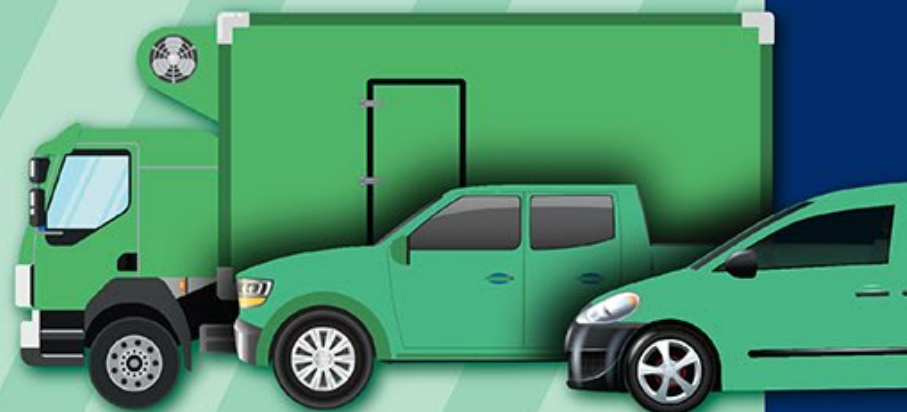
MARCH 2022

NEW LCV REGISTRATIONS

TOTAL: 40,613

-27.6%

YEAR-ON-YEAR CHANGE



PICKUPs

4,457



-48.4%

4X4s

446



-33.3%

VANS <2.0t

903



-70.8%

Vans >2.0-2.5t

5,577



-27.6%

Vans >2.5-3.5t

29,230



-18.9%

Rigids >3.5-6.0t

611



1.0%

YEAR-ON-YEAR CHANGE



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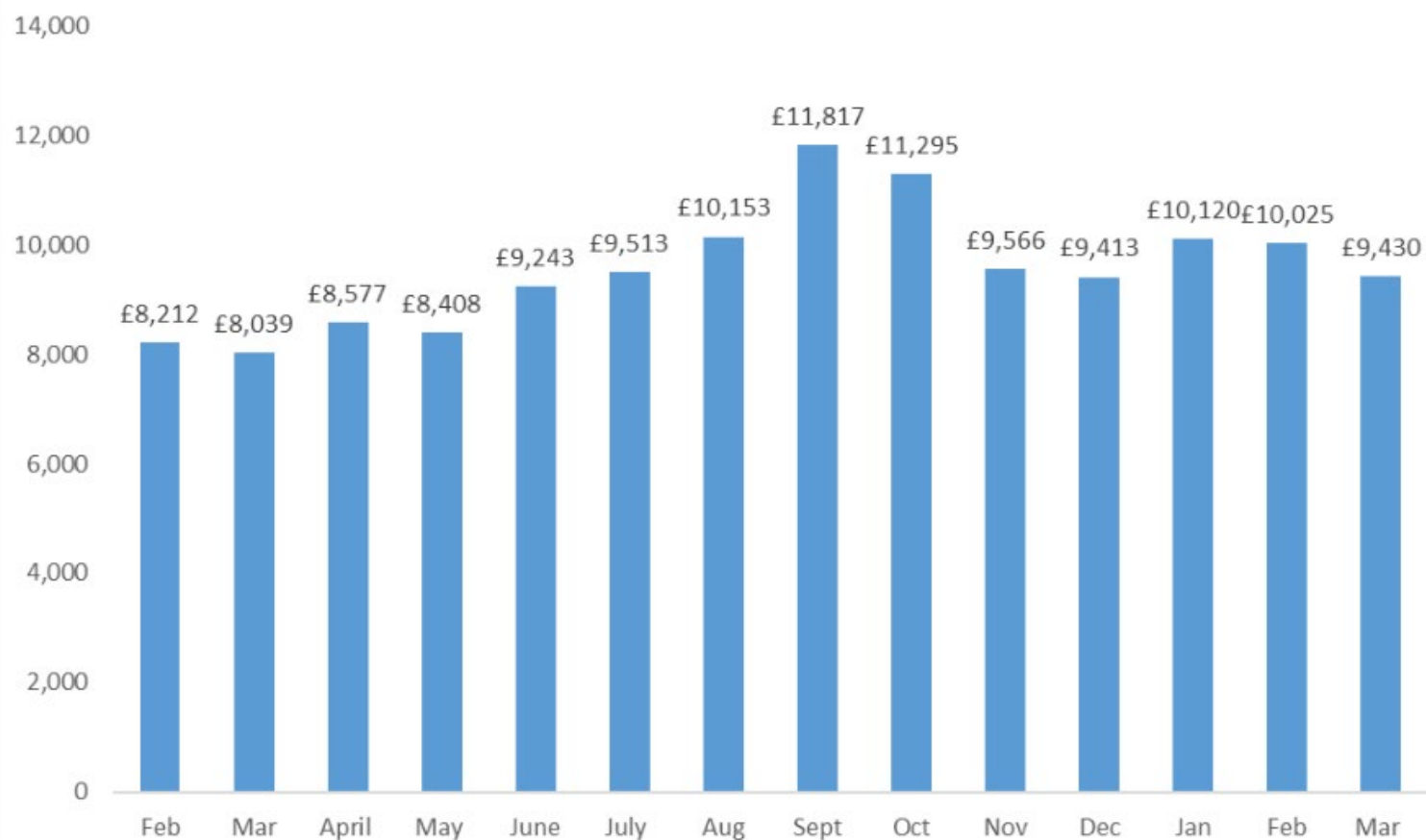
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BCA Online: Monthly average sold value - Cars



(* Source: BCA Valuations)

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Almost every aspect of vehicle repair is changing - some may say this has always been the case. But right now there is an enormous amount of change right through the motor insurance ecosystem, requiring careful navigation to ensure the future of many businesses.

Consumers:

The regulatory pricing changes in January has changed the motor insurance pricing dynamic and comes at a time when consumers are considering, more than ever before, how they use their vehicles and how they insure them. Rising fuel prices and post-pandemic mobility impacts are driving a demand for more innovative approaches from the motor insurance industry such as various telematics-based insurances.

Additionally, the rising cost of living are impacting consumers spending considerations (ranging from vehicle purchase to insurances) influencing where they purchase their insurance and excess levels – this, coupled with the continued difficulty to purchase vehicles, will impact the insurance claim driven repair volumes.

Businesses:

The costs of production are increasing rapidly – for many at a faster rate than their terms with work providers which is creating a significant profit gap. Arguably the biggest factor is the cost of energy but also the cost of acquiring and running courtesy vehicles, increasingly the cost of hiring and keeping skilled people, as well as the need to invest (with the rapid electrification of the car parc).

All this change is set against significant changes to the supply and demand dynamics for new and used cars, caused through various macro factors creating component delays and limited production.

Keeping abreast of all these issues is becoming increasingly important.

The only constant in life is change – Heraclitus, Greek Philosopher

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