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The **2022** financial performance of the UK's top 100 dealer groups

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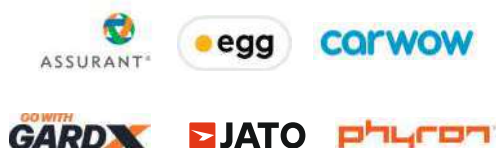
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EDITOR'S LETTER

Welcome to the 2022 AM100 report. What a year it has been for major franchised dealer groups, and for major used car specialists too. Yet again, I'm delighted that the motor trade experts at accountancy firm BDO have partnered with *AM* for the AM100 research. Its head of motor retail Steve Le Bas and senior audit manager James Evans have been analysing statutory accounts from 2021 and crunching the numbers to monitor the financial output of the AM100.



Tim Rose
Editor



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Where 2021 accounts were not yet available from some groups, they and I collaborated to agree turnover estimates. I'm confident we have built an accurate picture of the industry's state of health in 2021. We already know that 2021 was a remarkable year for the UK's motor trade, but just how remarkable for the entire cohort is revealed on the pages in this report. Overleaf, you'll see our findings, while the main turnover table is in the centre. There is also a webinar presentation on the AM100, recorded live on November 16 and available via AM-online to watch on demand.

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in association with **BDO**

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Damian Tyler, European Business Development and Commercial Director – Auto, Assurant

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financially stable and sustainable partnership you can trust. We have the size and scale to help our clients visualise success with more coverage, more expertise and unmatched insights.

From smart cars to electric vehicles, we stay current with market trends and help our partners anticipate the road ahead.

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Gareth Greppellini, Commercial Director, Egg

At Egg, we're inspiring a clearer path to clean energy. Since 2010, we've been designing, installing and maintaining renewable energy solutions, helping businesses like yours gear up for an exciting, sustainable future. One where you can not only take control over your energy needs, but feel pretty good about it.

We specialise in full, turnkey solutions combining EV charging points, solar panels and storage batteries. Ensuring everything will work perfectly together right from the outset, making your transition to renewables as straightforward as possible.

If your dealership and EV infrastructure plans are still on the 'to-do' list, don't worry. The move to EVs is a big step for your dealership – and a big step for your customers, too. Just like you, our customers are at the heart of what we do.

We can help you deliver an exceptional experience that carries your dealership's reputation into a new and exciting future, thanks to the EV

charging solutions we can install and maintain at both your dealership and your customers' homes. This builds even stronger relationships with your customers as you guide them towards reliable, flexible and cost-effective home charging.

We don't stop at EV charging. We can help power your business to a brighter, cleaner future. From harnessing the sun's power with solar panels to storing it with battery storage, we'll be by your side as you plan for tomorrow.

Egg make clean energy simple, convenient, and transparent.

To find out how Egg can help you crack carbon zero visit www.crackingenergy.com.



Game-changing insights to help partners generate more sales



Sally Foote, carwow's UK Managing Director

Carwow is delighted to be a headline sponsor of AM100 2022! Congratulations to all the dealers listed; this is a fantastic piece of recognition and it's wonderful to see so many of carwow's partners in these pages.

We might be the UK's go-to place for car buying and selling online, but we truly understand the need for brilliant professionals to give invaluable advice and exceptional service to our customers in-person.

This year has been another one of great change in the industry and we've been working hard to help our dealers with our suite of data-driven tools and services, including lead generation, stock sourcing, brand building, e-commerce training, marketing and advertising.

In 2022, we partnered with Re:infer, and with the help of its Conversational Data Intelligence platform, we can systematically analyse the millions of enquiries from customers, OEMs and dealer partners that we receive.

Doing so has created a gold mine of insights, and we're now able to highlight areas of improvement for enquiry handling, having discovered 100 'intents' or specific behaviours that help conversion. For example, responding within an hour increases the likelihood of a sale by a huge 30%, while personalised follow-ups are 2.3 times more likely to result in a purchase.

As well as helping you list cars for sale and buy used-car stock, we're here to share game-changing insights to help you improve your processes, boost your customer's experiences and generate more sales.

Find out how we can help you, at dealers.carwow.co.uk



One partner. A world of possibilities.



Billy Coutin, GardX Chief Executive Officer

When you go with GardX, you're going with the world's only integrated partner for vehicle protection, insurance solutions, and digital evolution. You're going with people from your industry. Solutions for your industry. And a guarantee that every part of our business was born to drive more growth for yours.

Our business is split into three clear brands, GardX Protect (vehicle protection), GardX Assure (insurance products) and GardX Engage (digital solutions). These brands are built on the common foundation of five core values that support our clients, protect our culture, underpin our purpose, while uniting and inspiring our growing global team.

The values that bind us are partnerships, integrity, innovation, passion and courage.

We don't just aspire for positive impact, we stake our reputation on it. That's why the GardX Guarantee exists.

By building a uniquely integrated offering, we aim to leverage a trusted international

reputation, while shaping our business to ensure partner dealers and OEMs continue to thrive in an increasingly dynamic and rapidly evolving industry.

Billy Coutin, CEO, says: "GardX is a family business, blending traditional family values with a spirit of innovation, and an unwavering passion for the automotive and motorcycle industries. Our leadership team embodies our vision and values, sharing accountability for driving success, while instilling a culture of innovation and positive disruption across our global team."

To find out more about GardX and how it can support your business and drive your growth, please email enquiries@gardx.co.uk.



JATO Sales Link combines your intuition with our insights



Paul Hilton, Head of Sales Link, Jato

The automotive industry is changing. As one of the pioneers of automotive business intelligence, JATO Dynamics' solutions have been leading the industry since 1984.

With operations in more than 50 overseas markets, the company's global insights and analysis on vehicle specifications, pricing, sales and registrations are utilised to inform strategic business decisions by many of the world's largest automotive players from vehicle manufacturers, fleet and leasing companies to dealerships, insurance companies and component suppliers.

Sales Link is the result of a decade of research and development, resulting in a platform designed in collaboration with dealers allowing you to combine your intuition with our insights.

In an ever-crowded market, with rapidly evolving vehicle technology, dealers tend to rely on their own sales data to make critical decisions. The type of vehicles ordered and how they are priced have significant financial implications; decisions like

these need to be right to ensure that customer demands are met while maintaining business objectives and goals.

Sales Link is our insight tool, your insight tool. With Sales Link you can understand at a glance how your business is performing in comparison with other dealers supplying data, drilling down into vehicle discounts and options, as far as being able to compare specific engine and trim configurations.

In a world where vehicles are ever more connected, is your data? Unlock the wealth of data within your DMS to enable benchmarking, understand trends and compare your performance easily and intuitively.

JATO are delighted to be a sponsor of this year's Automotive Management Live event. Our team will be on hand to help you harness your data.

Contact: www.jato.com



Automated video production allows valuable resource to be freed up



Johan Sundstrand, co-founder and CEO, Phyron

With its world-first software solution for automated video production in automotive retail, Phyron is disrupting the trillion-dollar advertising and content marketing industry.

Powered by video automation technology with artificial intelligence (AI) and advanced logic, we produce an unlimited number of video ads with high-end creative quality, in any format, for any platform and for all customers' vehicles on the forecourt.

Our unique AI-powered software solves the demand for quality video content. It bridges the gap between businesses who advertise and their customers, who are video-first.

Phyron's AI technology identifies the key properties in the images, including numerous shot angles, interior elements and exterior highlights – totalling more than 152,000 unique vehicle attributes in the UK market, alone, and strips out backgrounds, replacing them with neutral ones.

The software then adds special effects, shadows

and overlays the desired product specifics and any offers on the relevant images, including price and branding.

We are automotive first - with 1,500-plus dealers and OEMs using our service, equating to 100,000 cars currently carrying a Phyron automated video across 17 countries.

The fully automated AI software creates videos for car ads that can be used on brand and retailer websites or on classified sites. Phyron is gearing up to post videos across social media channels.

Proven to drive 50% more visitors and sell cars three-five days faster, Phyron is transforming the online automotive retail landscape through automated videos and helping dealers free-up valuable resource while maintaining quality video content that delivers results.

Find out more at www.phyron.com





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OVERALL TURNOVER BACK TO 2019 LEVELS FUELLED BY USED VALUES



TURNOVER CHANGE BY PERCENTAGE AND VALUE

Rank 2022	Group	Turnover growth (%)
49	Marsh Wall	79.2%
99	Cars2	62.9%
79	DM Keith	50.5%
77	Chorley Group	50.1%
4	Vertu Motors	41.9%
81	Partridge of Hampshire	40.8%
98	Waylands Automotive	39.9%
6	Marshall Motor Holdings	39.2%
37	TG Holdcroft	37.3%
24	Steven Eagell	36.6%
69	Caffyns	35.6%
85	Arbury	35.3%
45	Hatfields	34.3%
58	Brindley Garages Group	31.7%
55	CEM Day	31.5%
12	PSA Retail UK	30.8%
63	Endeavour Automotive Group	30.1%
70	Stephen James Group	29.0%
8	TrustFord	28.9%
46	Citygate Group	28.2%
48	Jemca Car Group	27.7%
94	Burrows Motor Group	27.5%
38	Snows Motor Group *	27.4%
43	LSH Auto UK	27.4%
32	Peter Vardy	27.3%

Rank 2022	Group	Turnover growth (£,000)
4	Vertu Motors	1,067,387
2	Arnold Clark Automobiles	943,000
1	Sytner	881,525
6	Marshall Motor Holdings **	845,585
5	Pendragon	496,700
7	Group 1 Automotive *	412,899
8	TrustFord	407,159
3	Lookers	350,800
12	PSA Retail UK	275,512
9	Jardine Motors Group	254,982
11	Inchape *	216,759
15	John Clark Motor Group	188,498
13	Motus UK (incl. Pentagon Group)	188,359
24	Steven Eagell	188,315
16	Hendy Group *	167,222
49	Marsh Wall	138,277
26	Lloyd Motors	137,133
27	Johnsons Cars	133,525
19	Rybrook Holdings	129,907
37	TG Holdcroft	129,625
17	Swansway Garages	126,582
32	Peter Vardy	120,119
28	Helston Garages Group	115,096
29	Perrys Group	109,309
34	Allen Ford (Supergroup UK)	106,455


* estimated ** pro-rated

Consolidation in the market has led to some notable names disappearing from the AM100 cohort

This time last year we described 2020 as 'unprecedented'. However, with all that has happened both within the motor retail industry and the wider world, this word has now lost its impact through overuse despite it being an accurate and apt description at the time.

We have been asking ourselves what the 'new normal' is for some time now, but we still don't really know. Where 2020 was 'unprecedented' due to the arrival of the COVID-19 pandemic, the closure of showrooms, and the sector tailwinds that followed, so was 2021 for the disruption to supply, appreciation of used cars and the opportunities for greater profitability that it delivered.

Across the AM100 cohort turnover increased by 19% which meant it has returned to 2019 levels after the fall of 18% in 2020 as a result of the early impact of the pandemic.

While last year's research 

PROFIT BEFORE TAX (PBT) – TOP PERFORMERS

Rank 2022	Group	PBT (£,000)
2	Arnold Clark Automobiles	263,000
1	Sytner	178,128
3	Lookers	90,000
4	Vertu Motors	78,770
5	Pendragon	78,600
6	Marshall Motor Holdings	65,000
10	JCT600	45,046
28	Helston Garages Group	30,426
8	TrustFord	29,352
9	Jardine Motors Group	28,859
23	Park's Motor Group	26,338
24	Steven Eagell	25,811
17	Swansway Garages	25,169
26	Lloyd Motors	24,709
25	Dick Lovett Group	24,417
15	John Clark Motor Group	24,057
55	CEM Day	23,724
20	Greenhous Group	23,063
31	Cambria Automobiles	21,752
14	Listers	20,628

Rank 2021	Group	PBT (£,000)
2	Arnold Clark Automobiles	156,500
1	Sytner	100,357
5	Vertu Motors	22,399
12	Listers	20,628
6	Marshall Motor Holdings	20,356
28	Steven Eagell	16,841
26	Dick Lovett Group	14,740
30	Lloyd Motors	13,458
42	Currie Motors	12,436
16	Park's Motor Group	12,358
45	Porsche Retail Group	11,572
7	Group 1 Automotive	10,969
29	Helston Garages Group	10,797
27	Cambria Automobiles	10,185
20	Swansway Garages	10,174
23	Eastern Western Motor Group	9,695
35	Peter Vardy	9,271
53	Hatfields	8,854
65	CEM Day	7,657
44	Halliwell Jones Group	6,346

Rank 2020	Group	PBT (£,000)
4	Arnold Clark Automobiles	117,000
1	Sytner	71,799
5	Vertu Motors	25,332
7	Marshall Motor Holdings	22,100
20	Park's Motor Group	13,584
30	Allen Ford (Supergroup UK)	13,567
25	Helston Garages Group	12,891
24	Cambria Automobiles	12,276
49	Porsche Retail Group	10,251
15	Stoneacre Motor Group	10,144
39	Steven Eagell	9,803
18	Greenhous Group	9,163
52	Hatfields	8,799
31	Lloyd Motors	8,262
33	HR Owen	8,254
27	Dick Lovett Group	8,164
12	Listers	7,894
26	RRG Group and Norton Way Motors	7,249
54	City West Country	6,868
36	Peter Vardy	6,089

RETURN ON SALES (ROS) – TOP PERFORMERS

Rank 2022	Group	ROS (%)
55	CEM Day	9.0%
99	Cars2	5.8%
2	Arnold Clark Automobiles	5.5%
47	Porsche Retail Group	5.1%
28	Helston Garages Group	4.9%
45	Hatfields	4.8%
88	Parkway Derby	4.6%
75	Gates Group	4.5%
89	John Grose Group	3.9%
31	Cambria Automobiles	3.9%
26	Lloyd Motors	3.8%
91	Howards Group	3.8%
42	Halliwell Jones Group	3.8%
59	Bowker Motor Group	3.8%
23	Park's Motor Group	3.7%
25	Dick Lovett Group	3.7%
24	Steven Eagell	3.7%
78	Riverside Motors Group	3.7%
61	Yeomans	3.5%
10	JCT600	3.4%

Rank 2021	Group	ROS (%)
2	Arnold Clark Automobiles	4.1%
65	CEM Day	3.8%
45	Porsche Retail Group	3.7%
42	Currie Motors	3.5%
80	Toomeys	3.5%
53	Hatfields	3.5%
28	Steven Eagell	3.3%
95	Parkway Derby	2.8%
66	Yeomans	2.7%
30	Lloyd Motors	2.6%
83	Riverside Motors Group	2.6%
59	City West Country	2.6%
26	Dick Lovett Group	2.6%
63	Bowker Motor Group	2.5%
69	Hartwell	2.4%
84	Cotswold Motor Group	2.3%
87	Fish Brothers	2.1%
29	Helston Garages Group	2.1%
35	Peter Vardy	2.1%
1	Sytner	2.0%

Rank 2020	Group	ROS (%)
49	Porsche Retail Group	3.1%
52	Hatfields	2.9%
4	Arnold Clark Automobiles	2.6%
30	Allen Ford (Supergroup UK)	2.4%
69	CEM Day	2.3%
54	City West Country	2.3%
80	Toomeys	2.2%
39	Steven Eagell	2.2%
25	Helston Garages Group	2.0%
86	Riverside Motors Group	1.9%
24	Cambria Automobiles	1.9%
90	Fish Brothers	1.8%
94	Arbury	1.8%
20	Park's Motor Group	1.7%
58	Peoples	1.6%
33	HR Owen	1.6%
85	Cotswold Motor Group	1.6%
31	Lloyd Motors	1.5%
53	TC Harrison Group	1.4%
60	Drive Motor Retail	1.4%

PROFIT BEFORE INTEREST AND TAX (PBIT) PER STAFF MEMBER – TOP PERFORMERS

Rank 2022	Group	PBIT	Rank 2021	Group	PBIT	Rank 2020	Group	PBIT
47	Porsche Retail Group	58,528	45	Porsche Retail Group	39,227	49	Porsche Retail Group	35,275
55	CEM Day	52,423	80	Toomeys	27,999	52	Hatfields	20,742
99	Cars2	43,733	83	Riverside Motors Group	25,227	54	City West Country	17,799
45	Hatfields	41,474	53	Hatfields	20,192	69	CEM Day	13,954
78	Riverside Motors Group	40,807	44	Halliwell Jones Group	19,932	24	Cambria Automobiles	12,887
40	HR Owen	38,440	65	CEM Day	18,677	39	Steven Eagell	12,674
31	Cambria Automobiles	34,802	42	Currie Motors	17,217	25	Helston Garages Group	12,504
52	TC Harrison Group	33,895	26	Dick Lovett Group	16,966	30	Allen Ford (Supergroup UK)	11,601
42	Halliwell Jones Group	30,324	28	Steven Eagell	16,444	53	TC Harrison Group	11,431
28	Helston Garages Group	29,757	30	Lloyd Motors	15,980	58	Peoples	11,171
74	Toomeys	29,106	59	City West Country	14,708	94	Arbury	10,830
25	Dick Lovett Group	28,736	84	Cotswold Motor Group	14,209	85	Cotswold Motor Group	10,540
88	Parkway Derby	27,578	2	Arnold Clark Automobiles	13,543	27	Dick Lovett Group	10,295
75	Gates Group	25,921	20	Swansway Garages	13,328	90	Fish Brothers	10,235
17	Swansway Garages	25,815	29	Helston Garages Group	13,037	4	Arnold Clark Automobiles	10,206
2	Arnold Clark Automobiles	25,651	95	Parkway Derby	12,750	31	Lloyd Motors	9,159
26	Lloyd Motors	25,527	74	Marsh Wall	12,526	1	Sytner	8,587
24	Steven Eagell	24,913	90	Brayleys Cars	12,475	40	TG Holdcroft	8,307
20	Greenhous Group	23,799	39	HR Owen	12,286	36	Peter Vardy	7,838
91	Howards Group	23,117	1	Sytner	12,060	7	Marshall Motor Holdings	7,553

PROFIT PER FRANCHISED OUTLET – TOP PERFORMERS

Rank 2022	Group	(£s)	Rank 2021	Group	(£s)	Rank 2020	Group	(£s)
47	Porsche Retail Group	3,269,600	45	Porsche Retail Group	2,314,400	49	Porsche Retail Group	2,050,200
20	Greenhous Group	2,306,300	35	Peter Vardy	1,545,167	18	Greenhous Group	1,018,111
55	CEM Day	2,156,727	53	Hatfields	983,778	52	Hatfields	879,900
32	Peter Vardy	1,840,000	63	Bowker Motor Group	931,167	54	City West Country	858,500
45	Hatfields	1,821,667	26	Dick Lovett Group	867,059	85	Cotswold Motor Group	662,637
49	Marsh Wall	1,697,400	65	CEM Day	850,778	4	Arnold Clark Automobiles	606,218
59	Bowker Motor Group	1,554,167	1	Sytner	815,911	69	CEM Day	584,667
25	Dick Lovett Group	1,436,294	2	Arnold Clark Automobiles	778,607	1	Sytner	574,392
42	Halliwell Jones Group	1,397,400	59	City West Country	773,500	36	Peter Vardy	507,399
2	Arnold Clark Automobiles	1,376,963	84	Cotswold Motor Group	709,636	58	Peoples	506,195
1	Sytner	1,370,215	83	Riverside Motors Group	675,550	27	Dick Lovett Group	453,556
81	Partridge of Hampshire	1,242,500	30	Lloyd Motors	672,900	39	Steven Eagell	445,591
88	Parkway Derby	1,216,000	74	Marsh Wall	663,807	31	Lloyd Motors	393,429
17	Swansway Garages	1,198,524	44	Halliwell Jones Group	634,600	30	Allen Ford (Supergroup UK)	366,676
78	Riverside Motors Group	1,168,000	17	Greenhous Group	614,900	25	Helston Garages Group	348,405
35	Williams Motor Company	1,163,077	28	Steven Eagell	601,464	53	TC Harrison Group	335,154
82	Cotswold Motor Group	1,096,800	95	Parkway Derby	582,229	44	Halliwell Jones Group	316,509
26	Lloyd Motors	1,029,542	20	Swansway Garages	508,700	60	Drive Motor Retail	285,000
75	Gates Group	975,778	36	Williams Motor Company	465,077	24	Cambria Automobiles	279,000
10	JCT600	938,458	12	Listers	412,560	32	Sinclair Group	266,548



Sytner, headed by chief executive Darren Edwards, is nearing the £6bn turnover mark. It recently acquired fellow AM100 group Specialist Cars



West Way, Nissan's manufacturer-owned retailer, has disappeared from the AM100 due to being sold off in pieces

showed only 10 groups had managed to increase their turnover in 2020, the opposite was true in 2021 where we find that only four groups (with a December 2021 year-end) recorded a fall in revenue.

Those with the biggest monetary increase were, unsurprisingly, the larger groups. Vertu Motors had the biggest increase, primarily as a result of its year-end being February meaning a greater proportion of its prior year included lockdowns and there was less impact in the current period for which we have data.

The turnover growth as a percentage was more spread among the AM100, with all quartiles increasing their revenue by 15-20% on average. As a result, the proportion of turnover within the AM100 split by quartile remained consistent with 2020 and the top 25 companies accounted for 68% of the turnover (comparable with 67% last year).

The largest growth was seen from Marsh Wall, which trades as Berry BMW/Mini, which, coincidentally, was one of the few groups to increase its turnover in 2020. This meant it was the biggest mover in the cohort, rising 25 places.

Chorley Group was next, climbing 17 places and then Arbury by 13 places, both helped by adding sites to their existing portfolio.

Further consolidation in the market means that some notable names no longer appear on the AM100 list.

West Way, Nissan's manufacturer-owned 13-site dealer, has recently been sold off in pieces to other Nissan franchisees including Yeomans and Glyn Hopkin.

BMW/Mini dealer group Specialist Cars was acquired by Sytner early in 2022, and the most notable change was the acquisition by Marshall Motor Holdings of Motorline, which was inside last year's AM100 top 25.

This has allowed new entrants to join the cohort with Burrows, WR Davies, Waylands and Cars2 being added to the 2022 AM100 and Grevan Cars re-joining after falling out in 2020. The highest new entrant was Burrows at number 94.

While 2021 had a lower impact from showroom closures, which assisted in the recovery of turnover to 2019 levels, the biggest impact on the 2021 results was the unprecedented (there's that word again) increase in the value of used vehicles.

This was a result of the combined impact of supply constraints in the new vehicle market (due in part to the well-publicised shortage of semiconductors) and increased consumer demand.

This led to some instances where used vehicles were even being sold for a higher amount than their new counterparts.

For dealers it meant an opportunity for greater profitability which they

definitely seized. The AM100 cohort achieved a net margin of 2.6% in 2021 compared with 0.7% the previous year.

Only nine groups were able to exceed this return in 2020 which shows just how strong profitability was in the industry in 2021.

Whereas over the past few years 2% was considered the benchmark for a strong return, this was matched or bettered by three-quarters of the dealership groups this year, up from a quarter in the previous year.

CEM Day, a long-time high performer in profitability, led the way with an exceptional 9% return. It was followed by newcomers Cars2 with 5.8% and AM100 stalwarts Arnold Clark with 5.5%. Both Arnold Clark and CEM Day are regulars atop this table. At the other end of the scale just two groups made a loss in the year compared with 16 in the previous period. In fact, only

Ceight groups made a net margin of less than 1% compared with almost half the year before.

Porsche Retail Group continued its domination of the profit per franchised outlet table in a list understandably dominated by groups with strong representation of the more premium part of the market. Porsche's manufacturer-owned group also topped the profit per employee table yet again where all of the top 20 groups by this metric had a profit per employee of more than £23k. Only three groups managed this in 2020.

Interestingly, there were around 115,000 staff employed across the AM100 groups which was a fall from almost 125,000 the year before.

While many businesses made job cuts or had recruitment freezes in the aftermath of 2020's nationwide disruption, this reduction might be a result of more automated systems and processes in dealers across the country or perhaps groups finding during the pandemic that greater efficiencies could be found with slightly fewer staff.

However this might also show the pressure on resourcing of staff and the challenge of employee retention.

Already in 2022, we have seen an end to the exceptional used car increases though values remain significantly higher than pre-pandemic levels.

The new vehicle supply issues

remain and the Society of Motor Manufacturers and Traders (SMMT) is forecasting the level of new vehicle registrations in 2022 to be slightly behind both 2020 and 2021 levels. The semiconductor shortages have been exacerbated by the war in Ukraine, which has had a wide-ranging impact on raw material and transport costs, and also the lingering effect of COVID with China's Zero COVID policy with manufacturing and production impacted by local lockdowns in cities such as Shanghai.

However, the consensus is that the supply is starting to improve and the SMMT expects an 18% increase in 2023 though this will still be around 18% lower than 2019 levels.

While supply side issues may ease there is now uncertainty on demand. The cost-of-living crisis, coupled with rising interest rates, have meant that disposable incomes are shrinking and potential customers are thinking twice or delaying a change in car.

The increased costs for consumers also impact the retailers themselves.

High inflation is likely to erode margins as manufacturers, playing catch up, seek to ensure their own margins are maintained by increasing the price of new vehicles.

Energy and other costs such as wages are also increasing, meaning a higher fixed cost base to support.

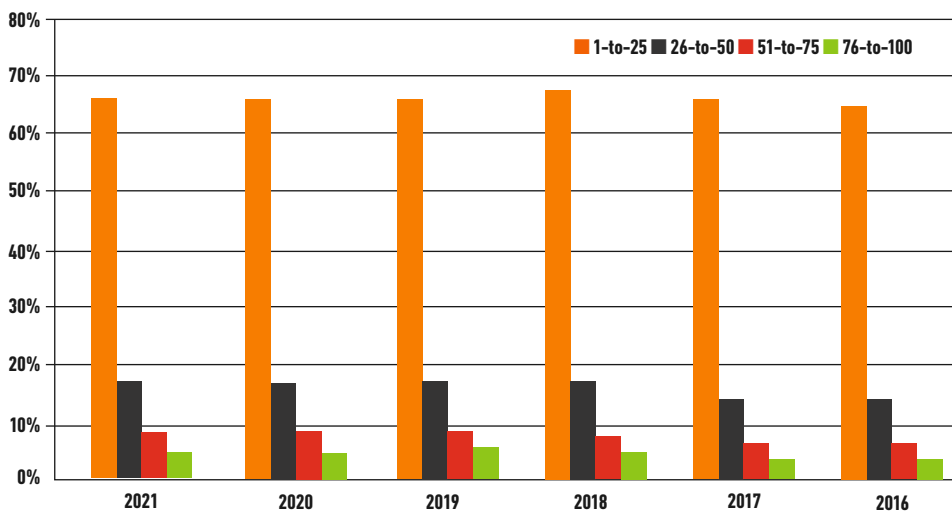
Despite these pressures it is not expected that softening demand and improved new vehicle supply will lead to a sudden correction to used vehicle values. The increases in 2021 have passed. However, small falls, as seen pre-pandemic, appear most likely as the market cautiously moves from one month to the next.

Although there are many uncertainties, there also remain some aspects of the industry that will not change. Appetite for consolidation and M&A activity will remain as groups invest off the back of a couple of years where cash positions have improved.

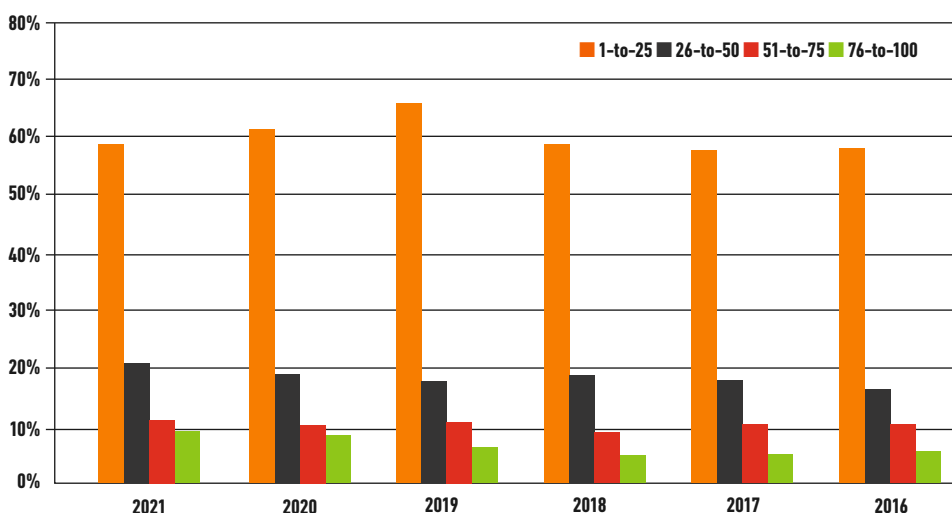
Motor retail groups will also continue to be resilient to changing consumer demand and the macro-economic environment. From cost pressures and high inflation to incoming agency models and the continuing rise of electric vehicles, the industry has always shown itself able to adapt and evolve in the face of change. In other years these future uncertainties might have been considered 'unprecedented' but perhaps this is the 'new normal' we are now living with.

STEVE LE BAS, partner and head of motor retail, and JAMES EVANS, senior audit manager, BDO

AM100 SHARE OF TOTAL TURNOVER BY QUARTILE



AM100 SHARE OF FRANCHISED OUTLETS BY QUARTILE



Notes on the AM100

- Information in the AM100 is derived from statutory accounts. Where statutory accounts are not current, an estimate is made.
- Profits are adjusted, where information is available, to eliminate exceptional items. Profit percentages are calculated on the unadjusted turnover numbers. Turnover is net of VAT.
- For the table to be as comprehensive as possible, where estimates are made by AM these reflect past performance, national sales performance of franchises held, and other information in the public domain.

UPS (AND DOWNS) AMONG THE LEADING CAR BRANDS



By David Francis, AM contributor

SAFE BET		AT RISK		BRANDS TO WATCH	
Audi	Mercedes-Benz	Alfa Romeo	Renault	Cupra	Škoda
BMW	Nissan	Citroën	Seat	Dacia	Tesla
Fiat	Peugeot	DS	smart	Hyundai	Toyota
Kia	Suzuki	Ford	SsangYong	MG	Volvo
Land Rover	Vauxhall	Honda	Subaru	Mini	
Lexus	Volkswagen	Jaguar		Polestar	
Mazda		Jeep		Porsche	

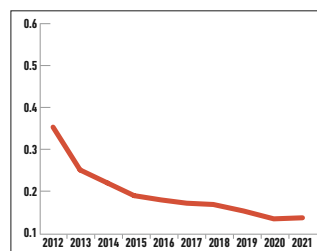
AT RISK

ALFA ROMEO

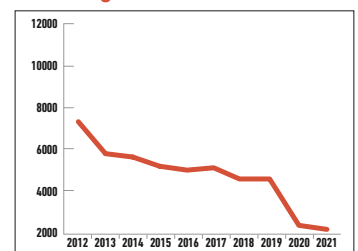
2012 Market Share: 0.35% 2022 Market Share: 0.11%

Just like Italian politics, there is always another saviour just around the corner. A whole new range is promised over the next five years, but where will the buyers come from? How many drivers of BMW, Volkswagen or Kia would be tempted to swap their dependable cars for the perceived risk (both in terms of reliability and resale values) of an Alfa Romeo?

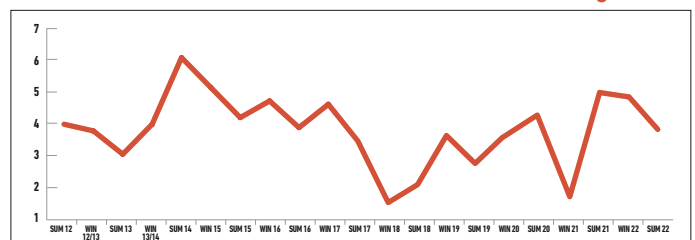
Market share



Annual registrations



National Franchised Dealers Association (NFDA) manufacturer rating

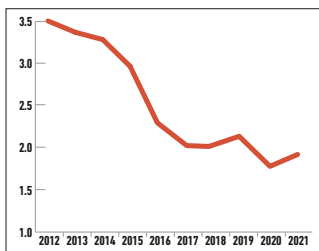


CITROËN

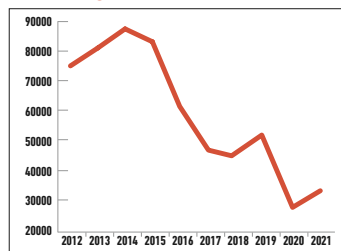
2012 Market Share: 3.60% **2022 Market Share: 1.89%**

Citroën's share has improved marginally this year, thanks to the C4, its biggest seller. The C3 and C3 Aircross are neck-and-neck in second place, with the C5 Aircross some way behind. That is not ideal: selling mostly B- and C-segment hatchbacks when the market is moving inexorably to crossovers means that Citroën is in danger of being left behind.

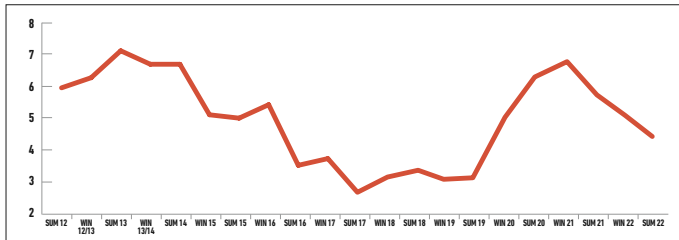
Market share



Annual registrations



NFDA manufacturer rating

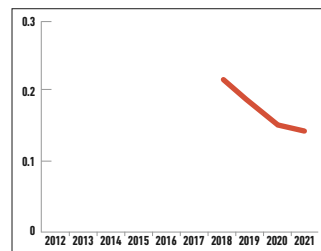


DS

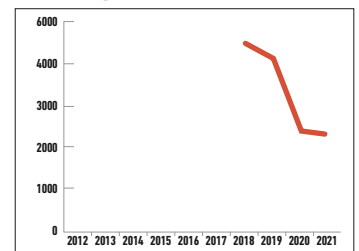
2012 Market Share: 0.83% **2022 Market Share: 0.21%**

Only the DS3 Crossback has exceeded sales of 1,000 units year-to-date (YTD) – but then the old DS3 hatchback used to sell close to 20,000 per year. You can imagine the management PowerPoint for the DS concept saying: “France does premium fashion, premium food, why not premium cars?” Whatever adjective British consumers associate with French cars, it is clearly not yet “premium”.

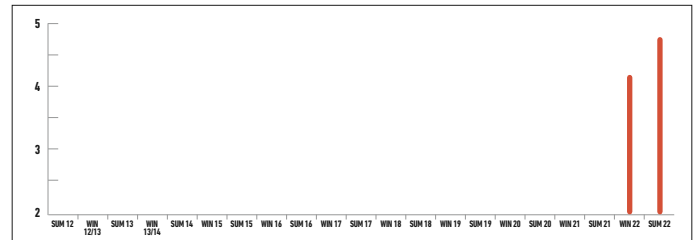
Market share



Annual registrations



NFDA manufacturer rating



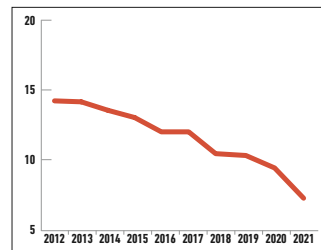
FORD

2012 Market Share: 13.79% **2022 Market Share: 7.84%**

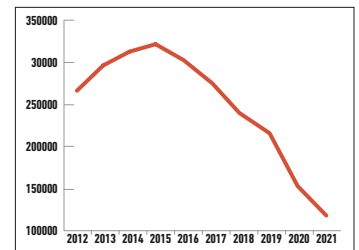
An excellent September (9.2%) means that Ford has slightly increased its market share this year. The company is doing well in B- and C-segment crossovers: the Puma is a clear segment leader and the Kuga is in fourth position. The bad news is that it is not managing the decline of its hatchbacks at all well. The Fiesta, traditionally the UK market leader, is in fifth position in B-segment hatchbacks, and the Focus is sixth in C-segment hatchbacks.

It may seem harsh to describe Ford as being “at risk”, but it is now easily the smallest of the traditional European mainstream car manufacturers. Its small car platform is now Europe-only, and does not have the volume to justify an all-new replacement. The future for small Ford cars seems to be taking VW platforms, with VW taking Ford platforms for medium and large vans.

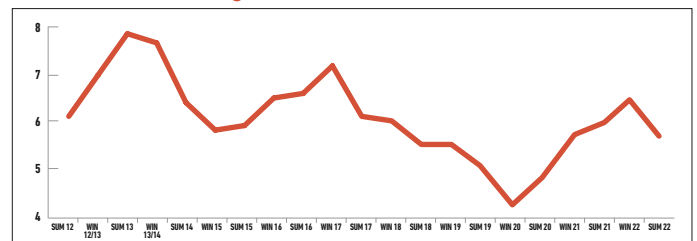
Market share



Annual registrations



NFDA manufacturer rating



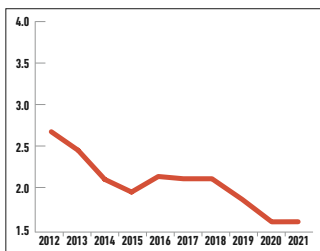
HONDA

2012 Market Share: 2.65% **2022 Market Share: 1.61%**

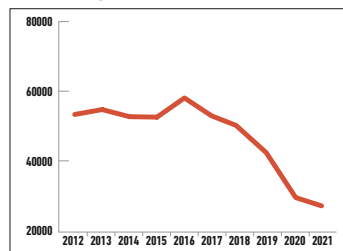
The Jazz still (just) makes it into the Top 10 in B-segment hatchbacks, but the HR-V is well outside the Top 10 in B-segment crossovers. That is a worry, given the way the market is moving. Also a worry will be the market failure of the electric Honda E, whose annual sales are not even 1,000 units. Like the old Toyota iQ, it is a brilliantly imaginative design solution, but at a price that is completely out of line with the public's perception of its value.

It should be noted that Honda is still having a terrible time across Europe. Its market share for the whole of 2021 was just 0.6%, with the UK accounting for a third of the total.

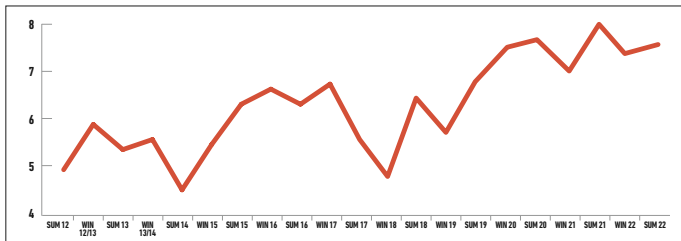
Market share



Annual registrations



NFDA manufacturer rating



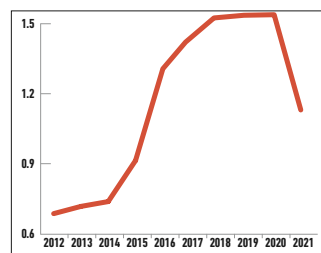
JAGUAR

2012 Market Share: 0.69% **2022 Market Share: 0.84%**

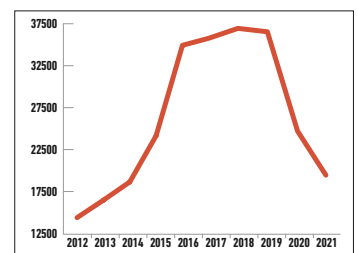
Only the F-Pace and the I-Pace still sell in significant numbers – the E-Pace is now the slowest-selling compact premium crossover in the UK (selling approximately 10% as many as the Evoque).

The question is whether this is part of the strategy to reposition Jaguar as a low-volume luxury brand. The CEO has effectively said that current models are not good enough to compete with the Germans. When the new products arrive, what will the pitch be – “our last models weren't good enough, but the new ones are great”?

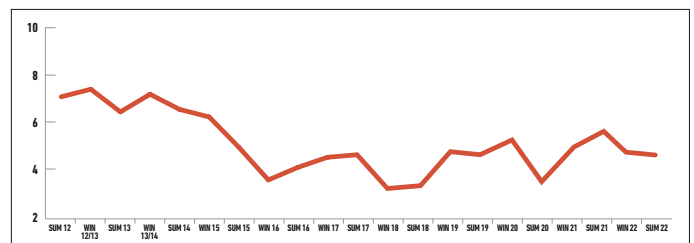
Market share



Annual registrations



NFDA manufacturer rating

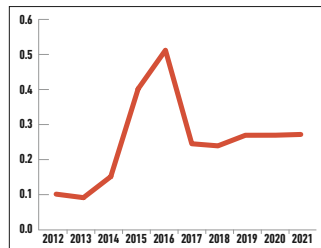


JEEP

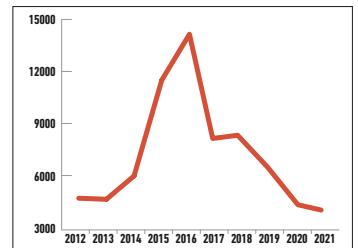
2012 Market Share: 0.11% **2022 Market Share: 0.17%**

Italians like small Jeeps (Fiat/Chrysler platforms with a more upmarket badge than Fiats), but the rest of Europe really can't see the point. The Renegade and Compass are pretty mediocre products and not exactly cheap (Jeep, apparently, sees itself as premium). Perhaps with the more extensive Stellantis parts bin it can come up with some models that have more to recommend them than a historic American badge.

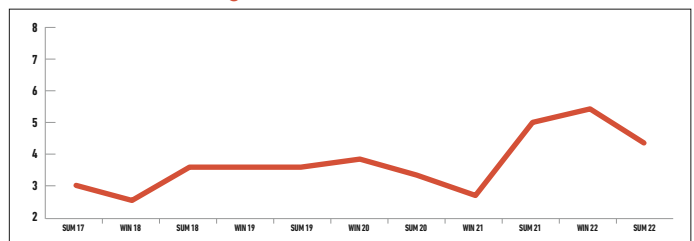
Market share



Annual registrations



NFDA manufacturer rating



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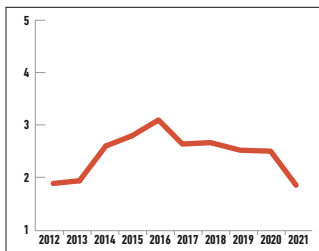


RENAULT

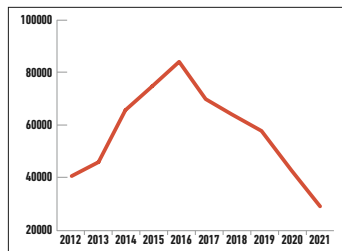
2012 Market Share: 1.99% 2022 Market Share: 1.84%

Despite the dreadful market share figure, 1.8% actually represents a small increase on last year. Its best-seller (using that term loosely) is the Captur, which does not make it into the Top 10 in its segment, let alone the overall market. Indeed, it is likely to be outsold by the Dacia Duster this year – that is like Škoda outselling VW. The new Arkana is doing reasonable business, but, again, is a mid-table performer.

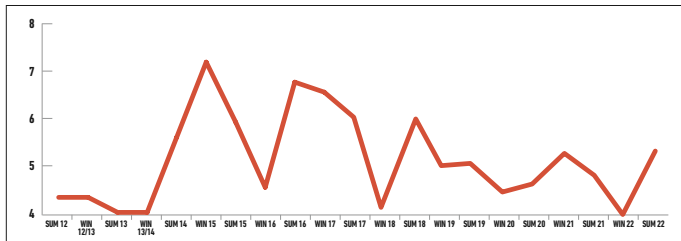
Market share



Annual registrations



NFDA manufacturer rating

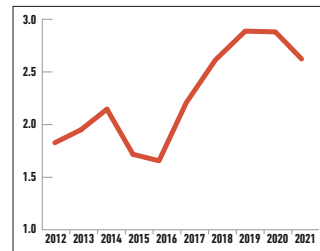


SEAT

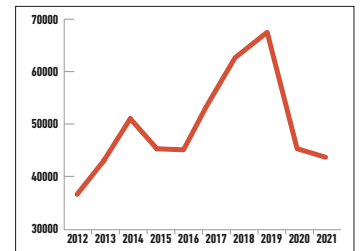
2012 Market Share: 1.90% 2022 Market Share: 1.40%

A couple of years ago, Seat's market share was approaching 3%, and its wilderness years seemed to be behind it. Now Seat is at the back of the VW queue for chips, and Cupra is at the front of the queue to swipe Seat buyers. Indeed, in both August and September of this year, Cupra actually outsold Seat. Presumably VW, Seat's overlord, is not too bothered if buyers move from Seat to more profitable Cupra, but it does suggest that Seat faces an uncertain future.

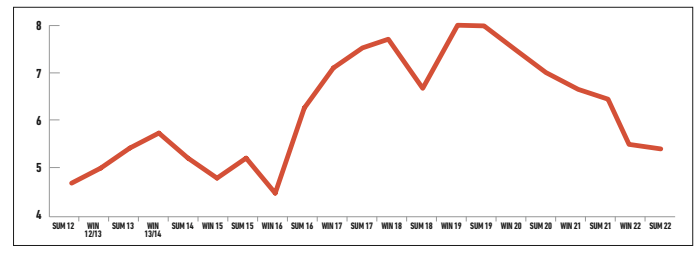
Market share



Annual registrations



NFDA manufacturer rating



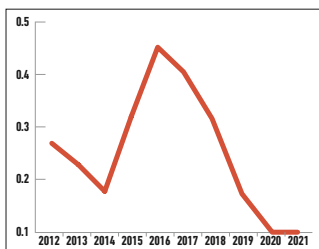
SMART

2012 Market Share: 0.27% 2022 Market Share: 0.09%

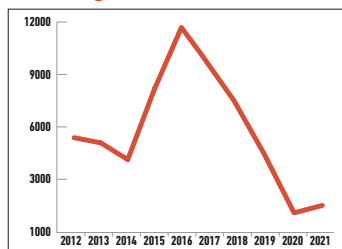
Smart is entering a new era via Chinese-made cars in a joint venture with Geely – the new start being underlined by its next model being given the slightly cringe-worthy name of #1. This is a much bigger car – a Hyundai Kona-sized small EV crossover at a likely price of £35,000-plus.

However, it is not expected to arrive in the UK until mid-2023, so Smart staff are likely to be kicking their heels for a few more months. Brand enthusiasts might snap up the last fortwos, but will anybody want a run-out forfour?

Market share



Annual registrations

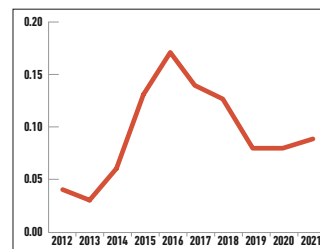


SSANGYONG

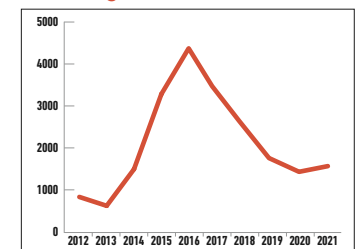
2012 Market Share: 0.04% 2022 Market Share: 0.10%

SsangYong's latest rescue bid collapsed in March 2022, leaving the company in administration. That is a place in which it has spent a depressing proportion of the past 25 years, after Daewoo, SAIC and Mahindra all failed to turn around its fortunes. Meanwhile, it has announced a BEV crossover called the Torres for 2023, so it gets full marks for carrying on regardless. However, with the global crash in the share price of EV start-ups, who would want to invest in a company with SsangYong's history?

Market share



Annual registrations

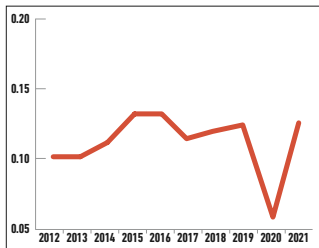


SUBARU

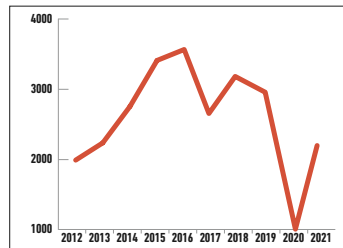
2012 Market Share: 0.10% 2022 Market Share: 0.07%

Sales this year are unlikely to get much beyond 1,200 units. It is hard to see how that is commercially viable for a company making mid-priced cars shipped half-way around the world. One has to admire Subaru's determination not to follow Daihatsu and Mitsubishi out of the UK market but, apart from historic links to UK-developed WRC rally cars, it is hard to see the attraction of the UK market for the company.

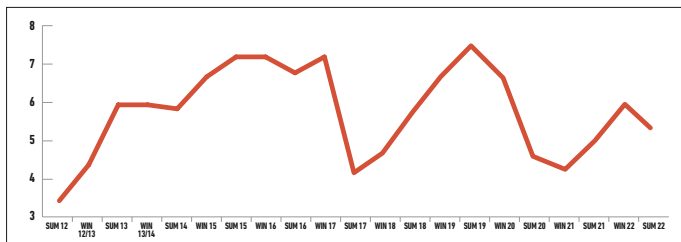
Market share



Annual registrations



NFDA manufacturer rating



BMW

2012 Market Share: 6.24% 2022 Market Share: 6.59%

Like its compatriots, BMW is temporarily losing share to the chip shortage. The worst-affected major model is the 3-Series, the car that has been BMW's best-seller since it was introduced in 1976. It is now only just ahead of the 1-Series and the increasingly successful X3. Could BMW's best-selling model soon be a crossover, rather than the premium saloon that has defined it for decades?

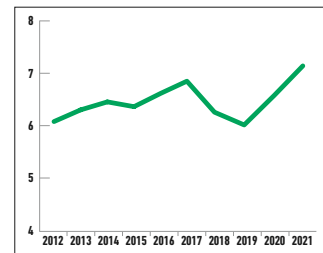
SAFE BETS

AUDI

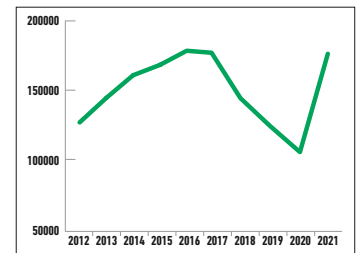
2012 Market Share: 6.05% 2022 Market Share: 6.62%

Audi has fallen back somewhat this year, but that is more to do with the chip shortage than any underlying change in sentiment towards the brand (although well-publicised software problems aren't helping on that score). The fact that all existing models have fallen by a similar amount suggests that there will be a rebound in market share once free supply is restored – although weary Audi dealers will be aware that “free supply” has rarely been a feature of selling Audis in the past five years. Shortages caused by problems homologating cars to the 2017 WLTP standards had only just been fixed when the chip shortage hit.

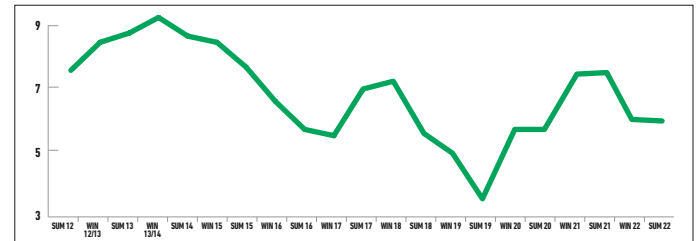
Market share



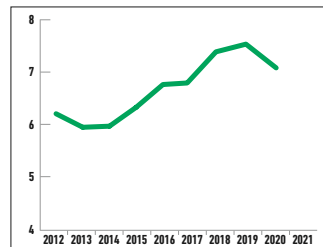
Annual registrations



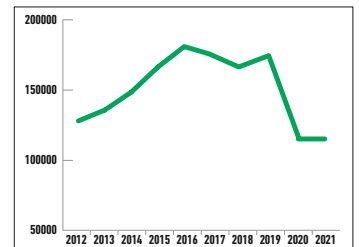
NFDA manufacturer rating



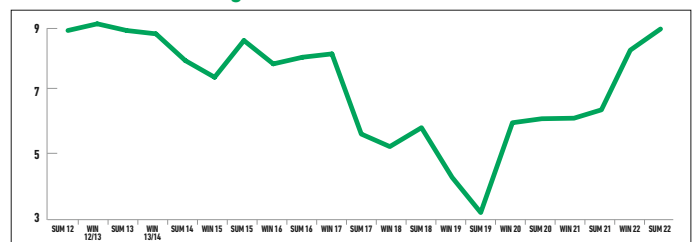
Market share



Annual registrations



NFDA manufacturer rating



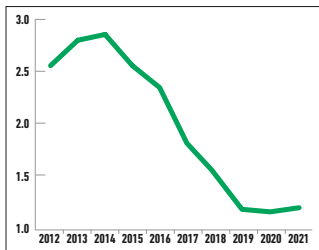
FIAT

2012 Market Share: 2.50% 2022 Market Share: 1.36%

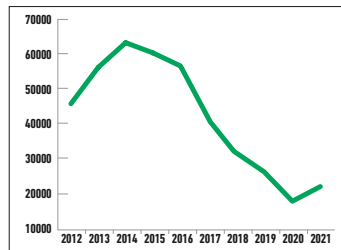
Fiat has been on the list of “at risk” brands for many years, but it now seems to have a defined role within Stellantis as the city car specialist. The future appears to consist of a new Panda, a new Punto and a new 500X, meaning that there may be no Fiats beyond the B-segment in future.

The strategy makes sense: better to concentrate resources on two segments in which Fiat has traditionally excelled, than waste money on a series of half-baked medium-sized models like the 500L and Tipo.

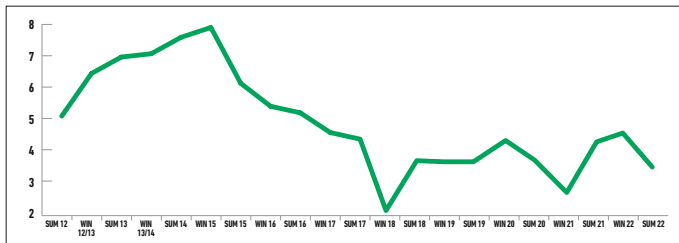
Market share



Annual registrations



NFDA manufacturer rating

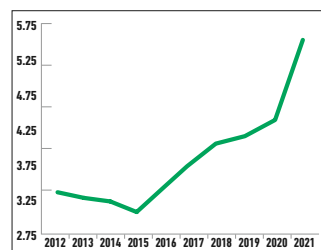


KIA

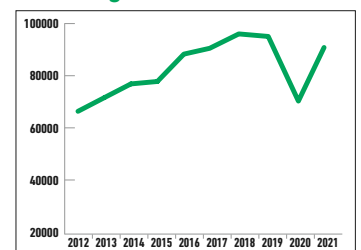
2012 Market Share: 3.26% 2022 Market Share: 6.88%

Kia has been a phenomenon in recent years, and is currently the third largest brand in the UK. While success is never down to one factor, a line can clearly be drawn from Kia's appointment of designer Peter Schreyer to a subsequent jump in sales as his designs hit the market. The public are, understandably, attracted to reliable cars that look good, are decent to drive and have very affordable prices. As ever, success looks easy in hindsight, but it belies a great deal of work both in Korea and at the UK importer. To rivals that are hoping Kia might lose momentum, the latest electric models, such as the EV6, suggest that Kia is having no difficulty mastering the transition to EVs.

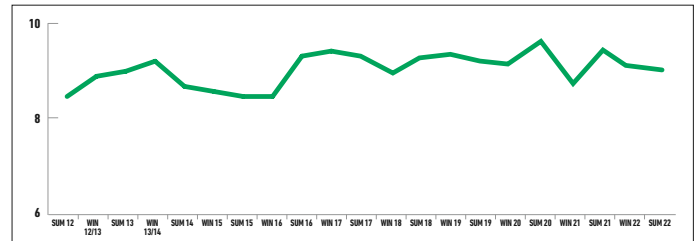
Market share



Annual registrations



NFDA manufacturer rating



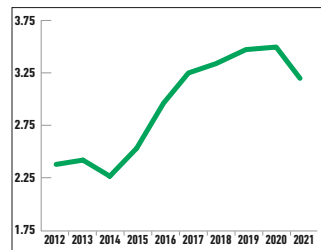
LAND ROVER

2012 Market Share: 2.38% 2022 Market Share: 2.80%

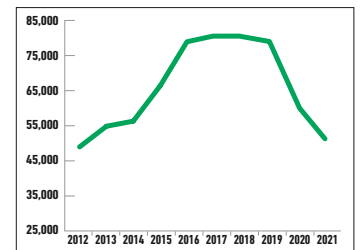
Market share has fallen sharply this year. It is hard to be certain about the cause, but it is no secret that JLR is not exactly at the top of the list of suppliers' favourite car manufacturers. The company made big promises about making a million cars a year, only to halve the target after suppliers had planned their production accordingly. When queuing up for scarce components, it is not ideal to be both small and unpopular.

All models have seen sales declines – even the hugely in-demand Defender. That has led the Defender to losing segment leadership to the BMW X5. Meanwhile, former segment leader, the Discovery, is heading towards the opposite end of the segment.

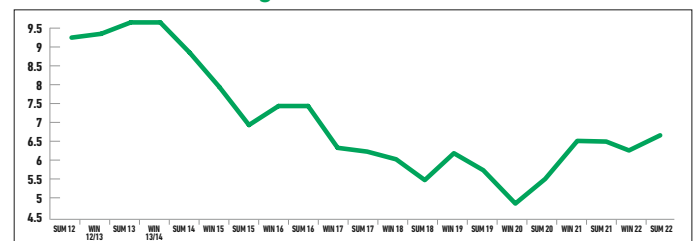
Market share



Annual registrations



NFDA manufacturer rating



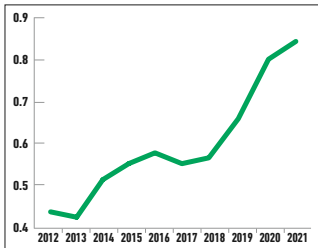
LEXUS

2012 Market Share: 0.41% 2022 Market Share: 0.59%

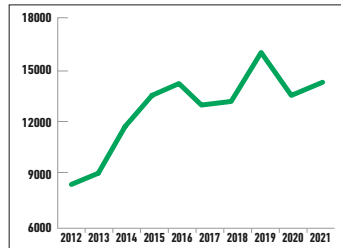
Lexus is now effectively a crossover-only brand in the UK (89% of total Lexus sales). All three crossovers are down this year, and market share is looking moderate at best. Cupra has already overtaken it and Polestar is catching it up. It would be a little cruel to say that Lexus was the future once, but it has never been able to build on the impact it made in the 1990s.

The reliability is unmatched and the dealer experience is second-to-none but, ultimately, people buy a car, not a dealership experience. On that score, Lexus has little of note to offer.

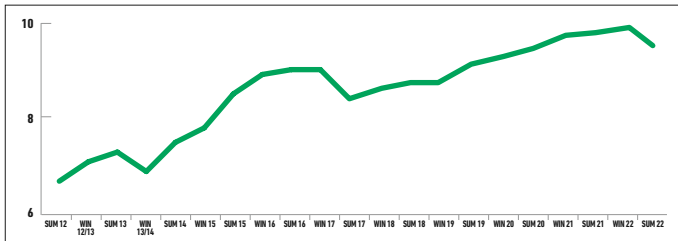
Market share



Annual registrations



NFDA manufacturer rating

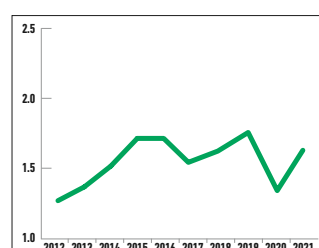


MAZDA

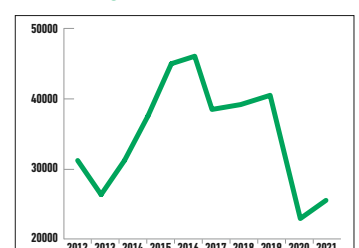
2012 Market Share: 1.28% 2022 Market Share: 1.54%

Mazda has lost some share this year, as sales of its best-selling models, the CX-30 and CX-5, have both fallen. However, the model that has really caught a cold is the MX-30. Mazda has a glorious history of telling the world it is wrong about powertrains (rotary engines and supercharged, rather than turbocharged, diesels to name but two). However, it really seems to be on a hiding to nothing with the MX-30. Telling people that they need less range, rather than more, from their EVs is like trying to sell a petrol engine with less power than its predecessor. It might make environmental sense, but it isn't what people want.

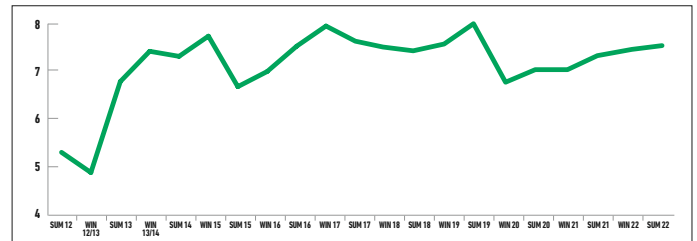
Market share



Annual registrations



NFDA manufacturer rating

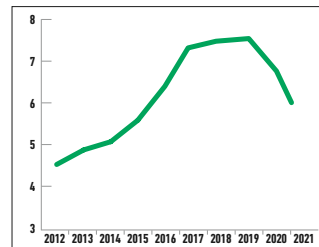


MERCEDES-BENZ

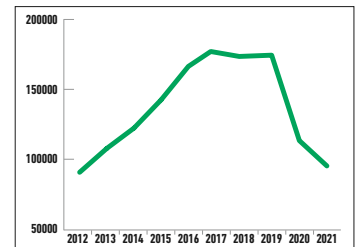
2012 Market Share: 4.49% 2022 Market Share: 5.41%

Mercedes is the one German brand that is partially surrendering market share by choice. After spending (and then writing off) billions trying to become one of the global mega-manufacturers, Mercedes has decided to turn through 180 degrees, and focus on premium and luxury cars – basically where it was in the 1980s. Out will go the A- and B-Class, and there will be more top-end models. After 25 years of alliances with a bewildering range of manufacturers (Chrysler, Mitsubishi, Renault, Nissan, Infiniti), Mercedes is going to concentrate on high-margin models. The message is that businesses should concentrate on profit – who knew?

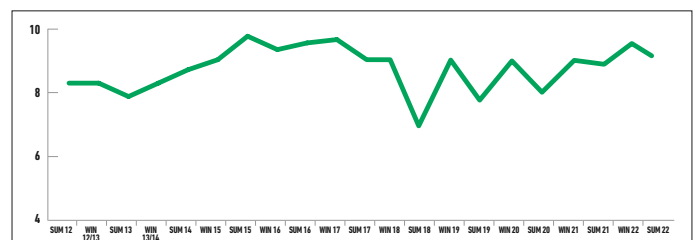
Market share



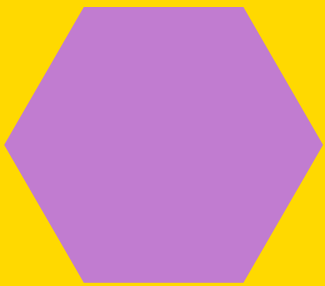
Annual registrations



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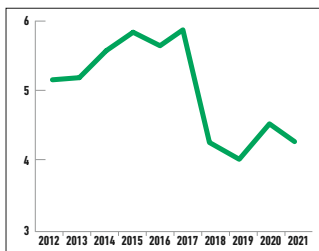
NISSAN

2012 Market Share: 5.18% 2022 Market Share: 4.37%

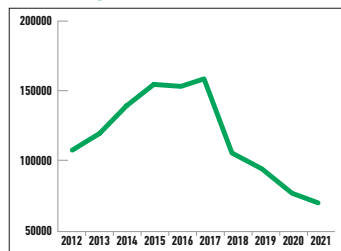
Nissan is effectively a two-model brand currently: the Juke and Qashqai account for 80% of total sales. The Qashqai is doing very well and has just overtaken the Kia Sportage for segment leadership. However, the second-generation Juke is not emulating the runaway success of its predecessor: it is only in fourth position in B-segment crossovers.

Nissan is hoping for a shot in the arm when the Japanese-made Ariya BEV establishes itself, and the Sunderland-made small BEV crossover arrives. Nissan will then be looking to get back to its historic 5%-6% market share.

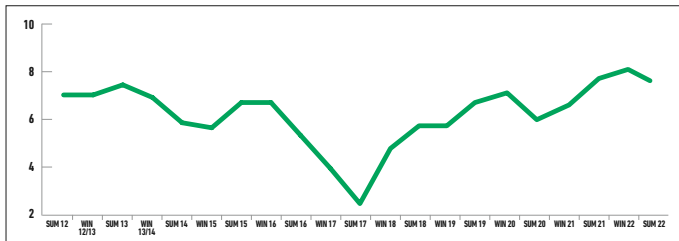
Market share



Annual registrations



NFDA manufacturer rating



PEUGEOT

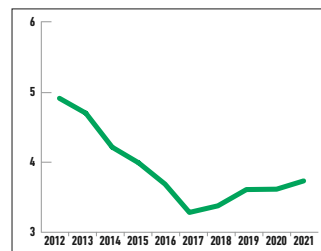
2012 Market Share: 4.87% 2022 Market Share: 3.54%

Until September, the 208 was ahead of the Fiesta – something even the fabled 205 had not managed. However, a moderate September performance saw it slip back down to sixth place.

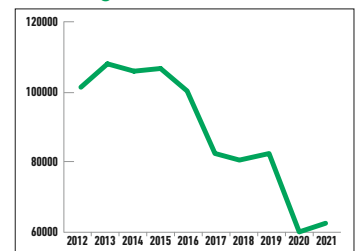
All the other big sellers in the Peugeot range are now crossovers (which now account for 52% of total sales); both the 2008 and 3008 are doing respectable business.

Peugeot is one of few brands to still retail a city car, the 108, though its 80% drop in sales this year could suggest that will change.

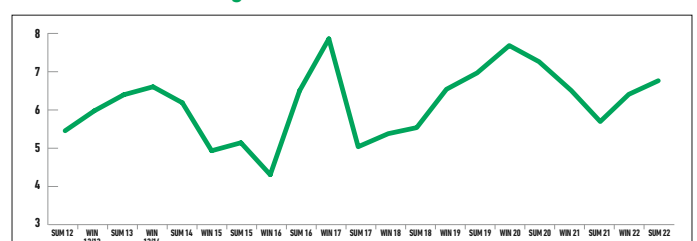
Market share



Annual registrations



NFDA manufacturer rating



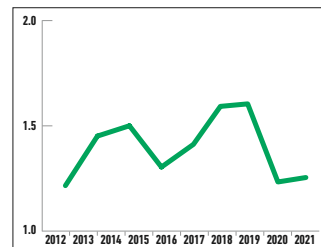
SUZUKI

2012 Market Share: 1.22% 2022 Market Share: 1.16%

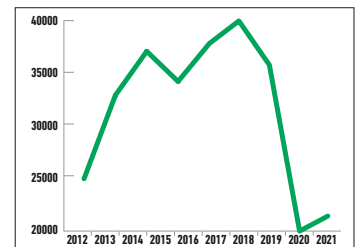
Market share has slipped slightly this year, as the Vitara, Swift and Ignis are all down by more than the overall market.

However, the strangely-named Swace has got off to a reasonable start. It is a rebadged Toyota Corolla hybrid estate, which fits Suzuki's range of no-nonsense cars quite well. However, the Across (this time a rebadged Rav4) looks to be a step too far. Not many Suzuki buyers – or Suzuki sales people – are used to models costing more than £45k. Only 114 had been sold/registered by October this year.

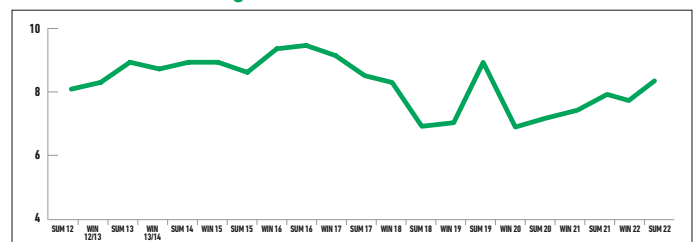
Market share



Annual registrations



NFDA manufacturer rating



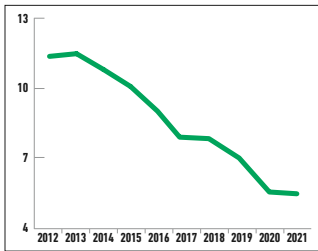
VAUXHALL

2012 Market Share: 11.36% 2022 Market Share: 5.47%

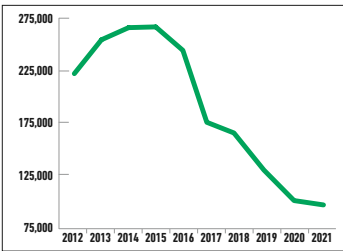
Vauxhall's share has stabilised this year. The Mokka has been doing very well: Vauxhall's B-segment crossover is up to second in its class, behind the Puma - an excellent result. Unfortunately, the increase in Mokka sales has been balanced by a decline in Crossland and Grandland registrations.

If Vauxhall is to get back to 6.0% market share, it will need the new Astra to improve. In motor racing parlance, the Astra is stuck on the start line with a box full of neutrals. It is currently not even in the top 20 C-segment hatchbacks, sandwiched between the Mazda 3 and Škoda Scala.

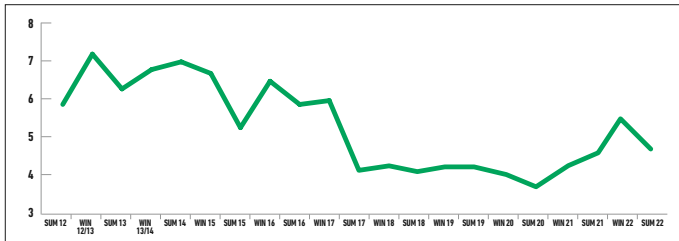
Market share



Annual registrations



NFDA manufacturer rating

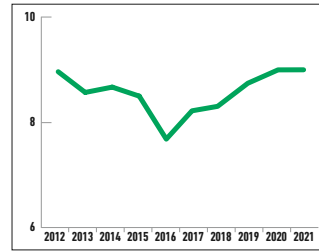


VOLKSWAGEN

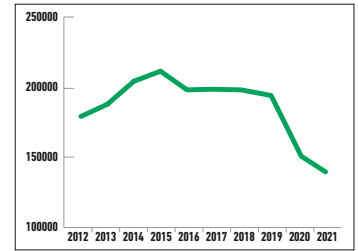
2012 Market Share: 8.96% 2022 Market Share: 7.63%

VW has been losing share as it has given priority for chips to whatever models in the group are most profitable. It would be unwise to bet against VW recovering in the next year or two. However, its policy of carpet-bombing the crossover segments with different models does seem a little extreme. It now has four petrol crossovers (T-Roc, Taigo, Tiguan, T-Cross) spread across the B- and C-segments, not to mention the ID4 and ID5 EVs which are on the cusp of being C-segment crossovers. The fact that only the Tiguan and T-Roc sell in big numbers suggests that buyers are confused, too.

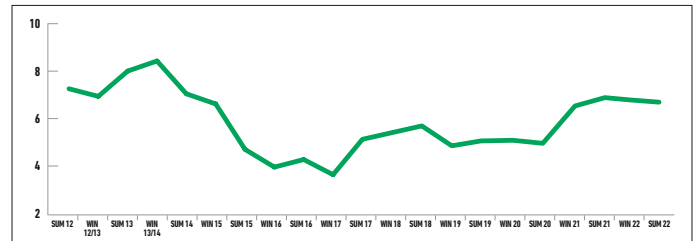
Market share



Annual registrations



NFDA manufacturer rating



BRANDS TO WATCH

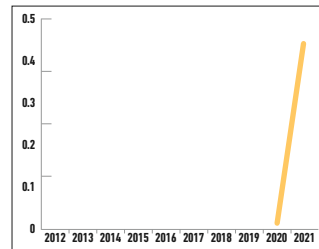
CUPRA

2012 Market Share: N/A 2022 Market Share: 0.87%

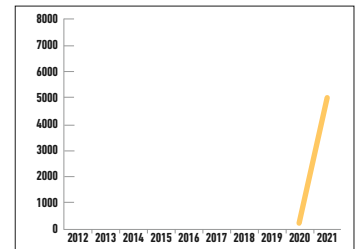
Back in 2010 (and again in 2018), VW wanted to buy Alfa Romeo so it could have a Mediterranean, sporty premium brand in its line-up. How it must be thanking its lucky stars that that plan never worked out. Cupra is doing exactly what Alfa was intended to achieve - and probably for a fraction of the cost.

The Formentor is leading the charge, but the Born is giving plenty of support. It seems only a matter of months before Cupra becomes a 1% brand - that is 10 times higher than Alfa Romeo.

Market share



Annual registrations



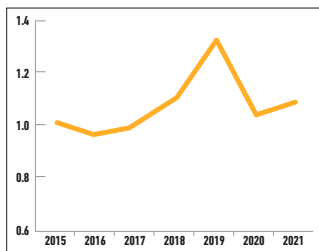
DACIA

2012 Market Share: N/A 2022 Market Share: 1.76%

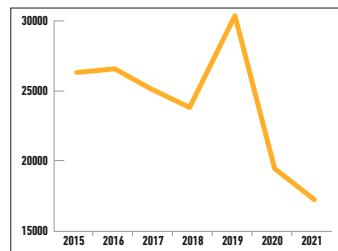
Dacia is one of the UK's fastest-growing brands this year. Its Sandero is leading the charge, and the new Jogger will only add impetus to the carmaker's growth. There is still the larger Bigster to follow – yes, the name is silly, but the VW Sharan survived an even worse moniker.

In a way, Dacia has been gifted some of its market share. For good reasons, Hyundai, Kia and Škoda all moved upmarket, but that has left a big hole in the market that Dacia (and also MG) is only too happy to fill.

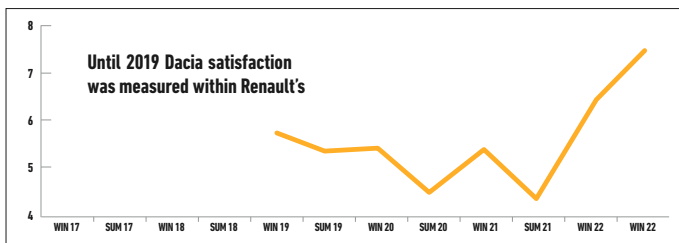
Market share



Annual registrations



NFDA manufacturer rating

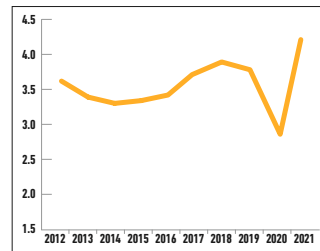


HYUNDAI

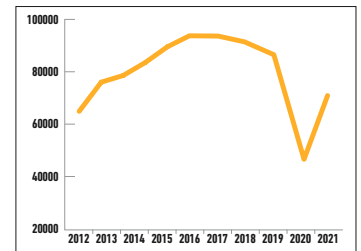
2012 Market Share: 3.63% 2022 Market Share: 5.30%

Hyundai is now getting back closer to its expected market share – at least the share expected by Korean HQ, given the UK sales figures of “junior” brand Kia. The two stand-out models are the Tucson (third in C-segment crossovers) and the Kona (fourth in B-segment crossovers). However, its i10/i20/i30 hatchbacks are only performing moderately. It will hope its Ioniq EV range will spur further growth. Despite the sales improvement, it still needs to get its dealers onside – Hyundai was 26th overall out of 32 brands in the most recent NFDA survey, whereas Kia was third. Which is cause and which is effect?

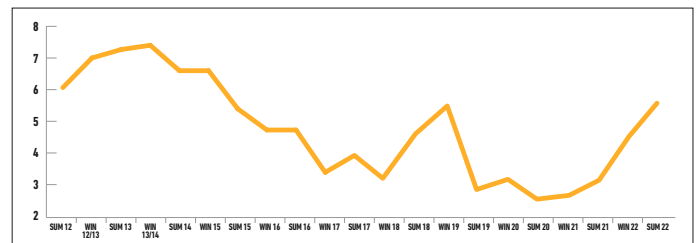
Market share



Annual registrations



NFDA manufacturer rating



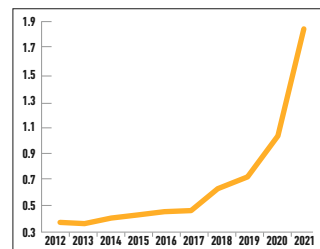
MG

2012 Market Share: 0.04% 2022 Market Share: 3.17%

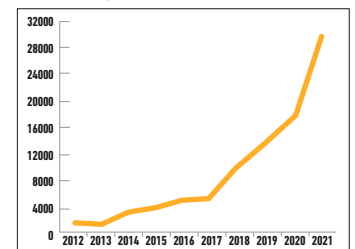
MG has been the standout performer in the UK car market in the past couple of years. Reasonable to drive, well-equipped and very well-priced, its cars have found a ready audience.

The interesting question is whether MG has locked-in its current market share or whether it could fall back slightly when the chip shortage ends. MG has clearly been affected by the chip shortage too, but there is no doubt that China has lost less production than Europe – latest figures suggest Europe will lose 1.4 million vehicles this year, but China will only lose 200,000. If MG can keep its customers happy, then it can stop them drifting back to their previous brands – after all, Kia has not seen many customers drift back to Renault or Fiat.

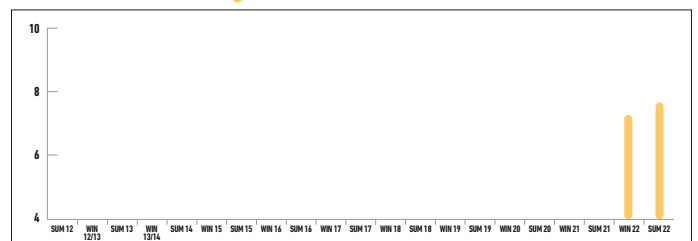
Market share



Annual registrations



NFDA manufacturer rating



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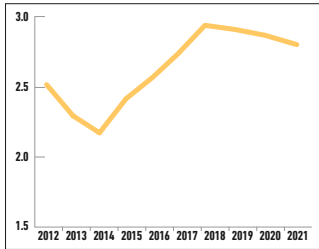


MINI

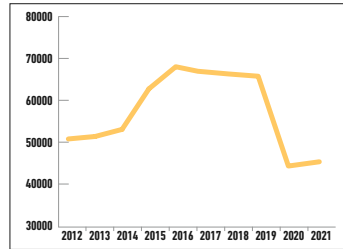
2012 Market Share: 2.51% 2022 Market Share: 2.67%

Mini is generally in a good place (at least outside the USA, where desirability increasingly means a fully-loaded pick-up that could swallow a Mini whole). Premium electrified B- and C-segment cars are in tune with the spirit of the times, and no rival can match Mini's cool, slightly cheeky image. Mini will soon have a range of electric models using dedicated platforms to run alongside the petrol versions. However, the electric models will be made in China.

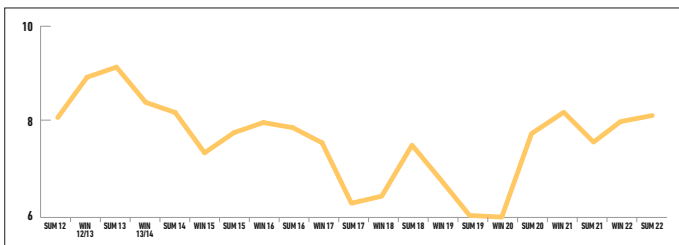
Market share



Annual registrations



NFSA manufacturer rating



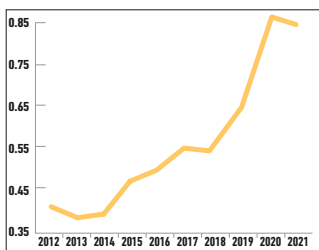
PORSCHE

2012 Market Share: 0.39% 2022 Market Share: 0.99%

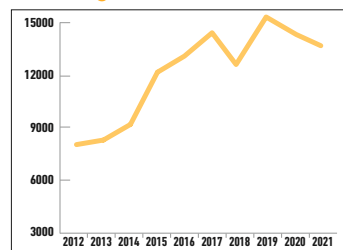
The Macan is battling the Taycan in the race to be Porsche's best-seller: crossover vs. luxury saloon. Sports cars now account for only 26% of total Porsche sales. Hence Porsche sees itself as a luxury brand rather than a sports car company.

The stock market certainly likes it that way. Porsche floated in September at \$73 billion (£65bn) – about the same as VW, and more than 50% higher than Stellantis. Stellantis has more than a dozen different brands across the world, but their combined value is way below a single brand from Stuttgart.

Market share



Annual registrations

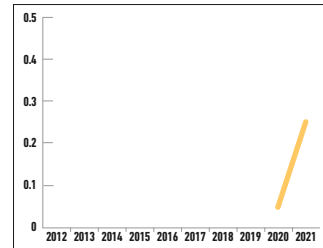


POLESTAR

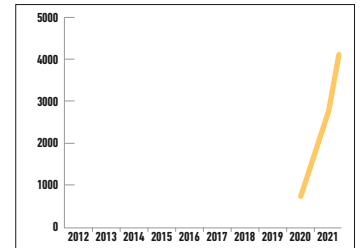
2012 Market Share: N/A 2022 Market Share: 0.32%

For a new brand with one fairly pricey model, a market share of more than 0.3% is an excellent result. Polestar should be able to build out from this bridgehead as new models arrive. Its positioning could hardly be better. A cooler and more environmentally-aware alternative to the German premium brands is absolutely the place to be. For years, mainstream brands (the French being the worst offenders) have been launching models like the C6 or 508 as "alternatives" to the ubiquitous German brands. Being different is pointless: being better, on a metric which resonates with the public, is what matters.

Market share



Annual registrations



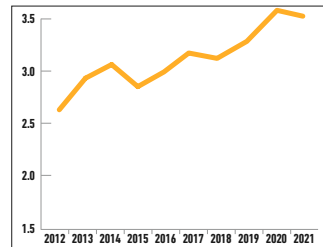
ŠKODA

2012 Market Share: 2.62% 2022 Market Share: 2.97%

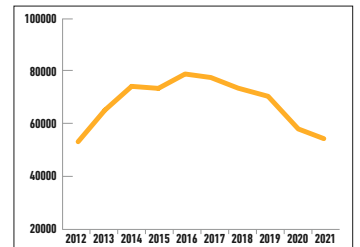
Škoda's share has dropped this year – inevitably so, as lower-priced models are not a priority for scarce VW chips. However, it is still the third biggest European mainstream brand in the UK, behind only VW and Peugeot.

Demonstrating that Škoda's decline is likely to be temporary, its new Enyaq BEV is doing pretty well and is neck-and-neck with the VW ID4. Furthermore, its largest model – the Kodiaq crossover – is holding its share better than Škoda's other conventional models. If its most valuable models are doing well, it suggests that its lower-value models are being held back by a shortage of components, rather than a shortage of demand.

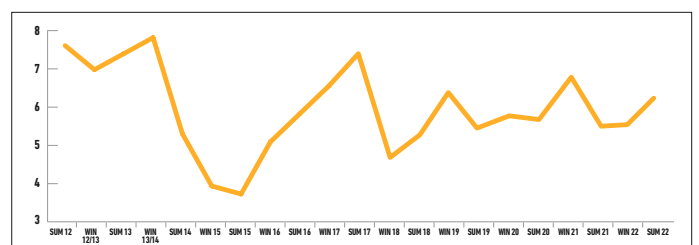
Market share



Annual registrations



NFSA manufacturer rating





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TOP 100 TABLE

Rank (2021)	Name	T/O 2022 (£,000)	T/O 2021 (£,000)	Outlets 2022	Outlets 2021	Staff 2022	Staff 2021
1 (1)	Sytner	5,797,731	4,916,206	130	123	9,155	9,466
2 (2)	Arnold Clark Automobiles	4,741,200	3,798,200	191	201	10,826	12,516
3 (3)	Lookers	4,050,700	3,699,900	155	154	6,524	6,594
4 (5)	Vertu Motors	3,615,052	2,547,665	164	174	5,870	5,751
5 (4)	Pendragon	3,421,300	2,924,600	141	146	5,489	5,536
6 (6)	Marshall Motor Holdings	3,000,000	2,154,415	173	129	5,356	3,691
7 (7)	Group 1 Automotive	1,951,354	1,537,101	80	65	n/a	3,241
8 (8)	TrustFord	1,813,596	1,406,437	47	67	2,620	2,776
9 (9)	Jardine Motors Group	1,612,811	1,357,829	46	48	2,709	2,756
10 (10)	JCT600	1,305,840	1,279,405	48	49	2,137	2,238
11 (12)	Inchape	1,300,000	1,083,241	75	75	n/a	2,498
12 (14)	PSA Retail UK	1,170,105	894,593	58	54	1,200	1,163
13 (13)	Motus UK (incl. Pentagon Group)	1,152,233	963,874	39	68	2,861	3,163
14 (11)	Listers	1,018,133	1,206,912	51	50	2,071	2,071
15 (19)	John Clark Motor Group	910,283	721,785	35	38	1,269	1,272
16 (18)	Hendy Group	900,000	732,778	76	76	n/a	1,722
17 (20)	Swansway Garages	838,460	711,878	21	20	1,085	1,044
18 (15)	Stoneacre Motor Group	806,305	825,718	132	142	2,624	2,611
19 (24)	Rybrook Holdings	790,374	660,467	27	24	989	1,071
20 (17)	Greenhous Group	789,225	812,863	10	10	906	1,269
21 (21)	Mercedes-Benz Retail Group	780,000	706,074	7	18	n/a	1,349
22 (23)	Eastern Western Motor Group	770,000	664,560	33	33	1,454	1,542
23 (16)	Park's Motor Group	705,320	812,919	69	66	1,843	2,098
24 (28)	Steven Eagell	702,721	514,406	31	28	1,077	1,047
25 (26)	Dick Lovett Group	659,862	566,182	17	17	872	929

Rank (2021)	Name	T/O 2022 (£,000)	T/O 2021 (£,000)	Outlets 2022	Outlets 2021	Staff 2022	Staff 2021
26 (30)	Lloyd Motors	645,741	508,608	24	20	996	897
27 (31)	Johnsons Cars	629,132	495,607	58	47	1,046	1,157
28 (29)	Helston Garages Group	626,666	511,570	39	38	980	1,094
29 (33)	Perrys Group	599,846	490,537	56	56	1,421	1,632
30 (32)	Harwoods Group	581,186	494,350	21	20	968	983
31 (27)	Cambria Automobiles	563,109	524,016	43	44	656	1,014
32 (35)	Peter Vardy	560,690	440,571	6	6	998	878
33 (34)	Sinclair Group	544,379	459,333	24	21	760	858
34 (37)	Allen Ford (Supergroup UK)	522,448	415,993	39	33	1,237	1,333
35 (36)	Williams Motor Company	505,418	431,013	13	13	745	781
36 (25)	RRG Group and Norton Way Motors	490,261	626,826	33	32	1,184	1,271
37 (43)	TG Holdcroft	476,977	347,352	30	26	527	577
38 (40)	Snows Motor Group	475,000	372,754	53	50	n/a	964
39 (41)	Glyn Hopkin	451,904	368,374	54	52	724	752
40 (39)	HR Owen	448,481	388,652	19	19	409	448
41 (38)	Renault Retail Group	384,064	398,459	30	36	719	787
42 (44)	Halliwell Jones Group	370,610	320,247	10	10	477	538
43 (48)	LSH Auto UK	364,980	286,417	13	13	609	682
44 (46)	Vindis Group	362,382	292,096	17	17	701	754
45 (52)	Hatfields	343,011	255,318	9	9	403	437
46 (50)	Citygate Group	336,296	262,283	18	14	598	581
47 (45)	Porsche Retail Group	320,139	310,975	5	5	282	291
48 (54)	Jemca Car Group	318,150	249,108	11	11	428	563
49 (74)	Marsh Wall	312,944	174,667	5	5	421	305
50 (55)	Mon Motors	305,971	244,357	12	11	564	621

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Franchised Authorised Repairers

Rank (2021)	Name	T/O 2022 (£,000)	T/O 2021 (£,000)	Outlets 2022	Outlets 2021	Staff 2022	Staff 2021
51 (56)	Peoples	289,554	242,295	9	9	378	385
52 (51)	TC Harrison Group	279,059	256,824	16	16	509	553
53 (60)	Drive Motor Retail	273,305	226,171	16	18	693	786
54 (53)	Donnelly Bros Garages (Dungannon)	264,399	252,364	27	29	527	662
55 (65)	CEM Day	263,365	200,217	11	9	532	585
56 (47)	BMW Retail (Park Lane)	261,756	288,880	2	2	231	232
57 (64)	Barretts of Canterbury	252,234	206,263	9	9	429	433
58 (67)	Brindley Garages Group	248,783	188,860	13	14	303	331
59 (63)	Bowker Motor Group	248,420	219,817	6	6	706	692
60 (58)	City West Country	245,056	235,396	8	8	605	469
61 (66)	Yeomans	244,228	192,318	23	22	447	473
62 (61)	Vospers	238,897	222,419	28	27	567	610
63 (70)	Endeavour Automotive Group	236,441	181,751	17	16	357	343
64 (62)	Eden Motor Group	230,000	219,861	26	26	n/a	584
65 (57)	Sandcliffe Motor Group	229,470	241,035	13	10	407	538
66 (59)	VT Holdings	227,000	227,768	15	18	501	415
67 (68)	Thurlow Nunn	226,547	186,524	11	11	604	594
68 (69)	Hartwell	225,081	184,327	14	16	356	417
69 (79)	Caffyns	223,928	165,085	16	16	402	450
70 (77)	Stephen James Group	218,735	169,598	8	8	340	398
71 (72)	William Morgan Group	213,614	178,983	6	6	329	365
72 (71)	Vantage Motor Group	206,858	181,050	13	14	380	402
73 (81)	Vines Group	196,243	158,819	7	7	287	337
74 (80)	Toomeys	196,011	164,079	16	16	358	307
75 (76)	Gates Group	193,876	172,626	9	9	328	384

GROUPS

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r Servicing, MOT & Repair

Rank (2021)	Name	T/O 2022 (£,000)	T/O 2021 (£,000)	Outlets 2022	Outlets 2021	Staff 2022	Staff 2021
76 (82)	JCB Group	192,497	154,475	26	23	282	323
77 (94)	Chorley Group	192,402	128,184	14	10	277	235
78 (83)	Riverside Motors Group	190,838	153,517	6	6	174	171
79 (97)	DM Keith	186,998	124,265	15	15	346	294
80 (73)	Marriott Motor Group	185,321	175,623	11	12	380	438
81 (93)	Partridge of Hampshire	181,466	128,902	2	2	163	171
82 (84)	Cotswold Motor Group	179,222	151,261	5	5	313	332
83 (78)	Heritage Automotive	176,147	169,479	18	17	326	386
84 (75)	Sandown Motors	174,412	172,649	11	9	426	429
85 (98)	Arbury	166,249	122,920	14	14	271	271
86 (91)	Foray Motor Group	163,883	130,276	6	6	384	410
87 (87)	Fish Brothers	162,218	143,505	13	14	295	285
88 (95)	Parkway Derby	160,115	126,060	6	6	287	322
89 (89)	John Grose Group	158,964	135,562	9	9	327	360
90 (90)	Brayleys Cars	157,841	134,111	17	10	273	317
91 (88)	Howards Group	155,057	137,140	19	14	239	265
92 (86)	SG Petch	145,924	144,671	26	19	315	325
93 (99)	Ancaster Group	145,691	120,984	21	18	315	324
94 NEW	Burrows Motor Group	141,610	111,102	8	8	335	338
95 (92)	Richmond Cars	140,000	129,753	13	13	n/a	333
96 (100)	Drift Bridge Group	124,806	112,892	4	4	247	273
97 NEW	WR Davies	124,614	105,311	12	12	237	256
98 NEW	Waylands Automotive	124,561	89,036	9	6	234	138
99 NEW	Cars2	124,199	76,242	15	11	174	160
100 NEW	Grevan Cars	122,786	111,851	11	11	232	263

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In our *General Managers' Guide To...* series of monthly webinars you can hear live from other motor retailers about how they're finding new opportunities in many of the critical areas of the business and tackling some of the common problems. Audience Q&As allow you to discuss the subjects further with our experts.

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GMs' Guide To...improving customer experience through technology | *GMs' Guide To... effective sales enquiry management*
GMs' Guide To... staff management and motivation | *GMs' Guide To... building your dealership's reputation*
GMs' Guide To... enhancing workshop efficiency | *GMs' Guide To... improving stock turn*

www.am-online.com/webinars

TESLA

2012 Market Share: N/A 2022 Market Share: 2.67%

Arguably a brilliant charging network with a car attached, Tesla has first-mover advantage in EVs which counts for a lot. Whether it counts for as much as Elon Musk claims is another matter. He has speculated that Tesla could be selling 20 million cars a year by 2030. However, given the number of his historic predictions that have now passed their expiry date, that one is probably not bothering the rest of the industry too much.

Tesla moves faster and takes more risks than any other major car manufacturer. So far, Tesla has avoided tripping over the risks it has taken, but the US safety authorities are taking an ever-closer look at Tesla's automated driving features. Even Elon could struggle to shrug them off.

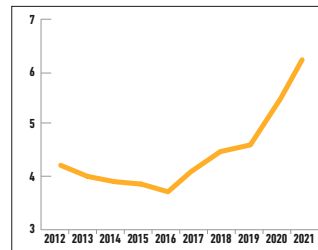
TOYOTA

2012 Market Share: 4.14% 2022 Market Share: 6.53%

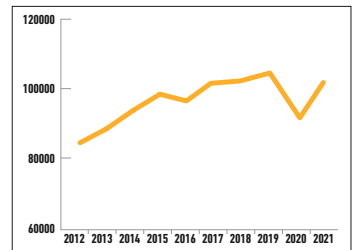
Toyota has had another good year, with market share hitting a record figure (up 0.2%). It is still in sixth position, but it is one of four companies (with Kia, Audi and BMW) that all have between 6.5% and 7.0% market share.

The growth is coming from Toyota's small crossovers – the Aygo X and the Yaris Cross. The only problem for Toyota is that it resisted moving to battery electric for a long time, insisting that hybrids have a greater overall environmental benefit. It is now changing direction, but will need time to catch up with some rivals.

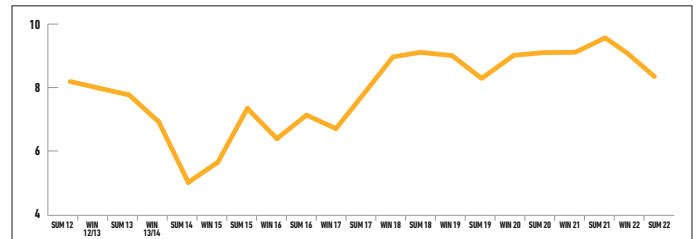
Market share



Annual registrations



NFDA manufacturer rating



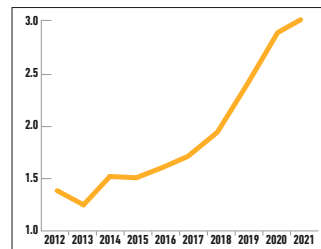
VOLVO

2012 Market Share: 1.55% 2022 Market Share: 2.16%

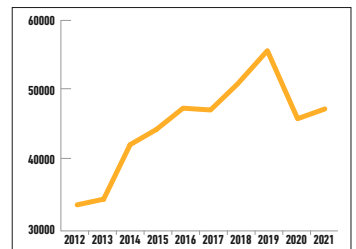
Volvo has lost some market share this year, as sales of the compact XC40 have fallen by 36%. However, it is still the UK's best-selling compact premium crossover (outselling the Evoque), so it is hardly in trouble. In fact, the XC40, XC60 and XC90 are all in the top five of their respective segments, so Volvo is still in a good position.

The new battery electric C40 Recharge has got off to a rather slow start. Volvo's first BEV-only model is actually a modified XC40, and a bit of a transitional product. Volvo is presumably working on a more compelling proposition for its first "born-electric" designs.

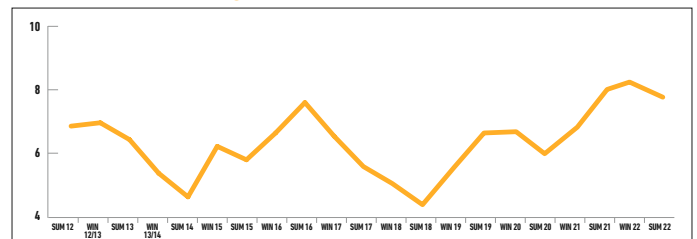
Market share



Annual registrations



NFDA manufacturer rating



A man with dark, wavy hair and glasses is looking down at a laptop screen. He is wearing a grey sweater. The background is a blurred office or home workspace with a lamp and some plants. A large yellow graphic element, resembling a stylized '7' or a large arrow, is overlaid on the right side of the image.

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We recognise that motor finance is an essential element of car buying and aim to support our partners in delivering the best possible experience. Together, we can drive great customer outcomes.

A
Allen Ford (Supergroup UK)
Franchises: Ford 21; Ford LCV 8; Hy 2; Kia 6; Maz 1; Suz 1
Key executives: Niall Hooper, group managing director; Paula Wood, group financial director; Richard Arnold, chief operating officer

Ancaster Group
Franchises: Abar 1; AR 1; Dac 2; Fi 2; Hy 4; Jeep 2; Niss 7; Ren 2
Key executives: Stephen Wood, managing director; Simon Hill, operations director; Robert Smith, aftersales director; David Bourne, finance director

Arbury
Franchises: Abar 1; Ci 1; Fi 1; Niss 2; Peu 6; Seat 2; Ško 1
Key executives: Ben Archer, managing director; Stephen Drew, finance director; Scott Stenning, director

Arnold Clark Automobiles
Franchises: Abar 16; AR 4; BMW 5; Cit 8; Dac 16; DS 4; Fi 17; Ford 3; Ford LCV 2; Ho 1; Hy 6; Jeep 6; Kia 10; Maz 4; MB 5; MG 7; Mini 5; Peu 10; Ren 16; Seat 6; Ško 2; Sm 1; Vx 23; VW 8; Vo 3; Other 4
Key executives: Eddie Hawthorne, chief executive and group managing director; Russell Borrie, chief operating officer; John Clark, chief commercial officer; Lady Philomena Clark, chairwoman

B
Barretts of Canterbury
Franchises: BMW 2; Cit 1; DS 1; Ho 1; Jag 2; LR 2; Mini 2
Key executives: Paul Barrett, managing director

BMW Retail (Park Lane)
Franchises: BMW 1; Mini 1
Key executives: Chris Learmouth, managing director; Tomas Ribes, chief financial officer

Bowker Motor Group
Franchises: BMW 2; Mini 2; Por 1; Other 1
Key executives: Paul Bowker, chief executive; Ben Gornall, finance director; Kenneth Bowker, director; Bill Bowker, director

Brayleys Cars
Franchises: Dac 1; Hon 9; Kia 3; Maz 3; Ren 1
Key executives: Paul Brayley, chief executive

Brindley Garages Group
Franchises: Ho 3; Hy 2; Kia 2; Maz 1; MG 2; Niss 1; Vo 1; Other 1
Key executives: Robert Brindley, chairman; Che Watson, managing director; Paul Ashcroft, finance director

Burrows Motor Group
Franchises: Kia 1; Maz 2; Toy 5
Key executives: Steve Burrows, managing director; Dean Cooper, operations director

C
Caffyns
Franchises: Au 3; Lo 1; MG 1; Seat 1; Ško 2; Vx 1; VW 4; Vo 2; Other 1
Key executives: Simon Caffyn, chief executive; Michael Warren, finance director; Sarah Caffyn, company secretary; Richard Wright, non-exec chairman

Cambria Automobiles
Franchises: Abar 2; AR 1; AM 4; Bn 2; Cit 1; Fi 4; Ford 4; Ho 1; Jag 5; Jeep 2; Lamb 2; LR 4; Maz 3; Mcl 1; RR 1; Suz 1; Vx 1; Vo 2; Other 2
Key executives: Mark Lavery, chief executive; Tim Duckers, managing director; Richard Hubbard, director; Natalie Boon, HR director

Cars2
Franchises: Abar 1; Dac 2; Fi 1; Hy 3; MG 2; Niss 2; Ren 2; Seat 2
Key executives: Allan Otley, managing director; Lindsay Collier, finance director; Jeremy Bates, business development director

CEM Day
Franchises: Fi 1; Fi LCV 1; Ford 4; Ford LCV 1; Iv 1; Niss 1; Peu 2; Other 1
Key executives: Graham Day, chairman; Russell Day, managing director; Jill Day, director; Grant Matthews, finance director

Chorley Group
Franchises: Cit 3; Hy 1; Isz 1; Kia 1; MG 2; Niss 5; Vx 1
Key executives: Adam Turner, managing director; Pauline Turner, aftersales director; Andrew Turner, chairman; Stacey Turner, legal director

City West Country
Franchises: MB 4; MB LCV 4
Key executives: Anthony Wickens, chairman; Michael Wickins, managing director; Gavin Walker, finance director

Citygate Group
Franchises: Kia 1; Seat 3; Ško 3; VW 5; VW LCV 3; Other 3
Key executives: Jonathan Smith, chief executive

Cotswold Motor Group
Franchises: BMW 2; Mini 2; Other 1
Key executives: Andrew Hulcoop, director; Paul Neale, director; Peter Redfern, director

D
Dick Lovett Group
Franchises: AM 1; BMW 4; Fer 1; Jag 1; LR 1; Mini 4; Por 4; Other 1
Key executives: Peter Lovett, chairman; Lynn Campbell, managing director; Julian Winterburn, finance director; Rebecca Maloney, director

DM Keith
Franchises: Ford 1; Ford LCV 1; Ho 1; Kia 2; Seat 2; Ško 7; Other 1
Key executives: Dougal Keith, managing director; Angus Keith director; Martin Nield, sales director

Donnelly Bros Garages (Dungannon)
Franchises: Abar 1; AR 1; Cit 2; Dac 2; Fi 1; Fi LCV 1; Ho 2; Jag 1; LR 1; Peu 3; Ren 2; Seat 1; Suz 1; Toy 1; Vx 1; Vx LCV 1; VW 2; VW LCV 3
Key executives: Terence Donnelly, executive chair; Raymond Donnelly, director; Dave Sheeran, managing director; Malcolm Kerr company secretary

Drift Bridge Group
Franchises: Au 1; Ho 1; Maz 1; VW 1
Key executives: John Frost, chairman; Philip Cue, managing director; Michael Frost, director; Jonathan Shaw, finance director

Drive Motor Retail
Franchises: Cit 1; MG 3; Vx 12
Key executives: Richard Manning, chairman; Stephen Bessex, chairman; Stuart Harrison, managing director; Rob Keenan, managing director

E
Eastern Western Motor Group
Franchises: BMW 2; Hon 3; Lex 2; Maz 2; MB 3; MB LCV 3; Mini 2; Niss 5; Sm 2; Toy 4; VW 4; Other 1
Key executives: Douglas Brown, group managing director; Nasser Mohammed, group financial director; Peter Collin, joint managing director; Keith Duncan, joint managing director; Kenneth Robb, financial director – motor trade

Eden Motor Group
Franchises: Fi 1; Hy 5; Maz 3; MG 2; Peu 2; Suz 1; Vx 12
Key executives: Graeme Potts, chief executive; Stephen Belcher, finance director; Nicola Hadley, chief financial officer

Endeavour Automotive Group
Franchises: Hy 6; Lo 1; Vo 7; Other 3
Key executives: John Caney, chief executive; Andrew Shackleton, finance director; Andrew Dick, director

F
Fish Brothers
Franchises: Dac 1; Ho 1; Kia 1; Lex 1; Niss 1; Peu 1; Peu LCV 1; Ren 1; Seat 1; Ško 1; Toy 1; VW 1; Other 1
Key executives: Mike Fish, joint managing director; Tim Fish, joint managing director; Keith Butler, finance director; Jon Fish, director

Foray Motor Group
Franchises: Ford 4; Ford LCV 2
Key executives: Simon Moulton, managing director; Chris Yoxon, director; Claire Gardiner, finance director

G
Gates Group
Franchises: Ford 6; Ford LCV 3
Key executives: Heath Greenall, managing director; Phil Benson, finance director; Suzanne Greenall, director

Glyn Hopkin
Franchises: Abar 5; AR 4; Dac 3; Fi 8; Ho 1; Jeep 4; Kia 2; MG 6; Niss 14; Ren 3; Suz 3; Other 2
Key executives: Glyn Hopkin, chairman; Fraser Cohen, managing director; Hady Laba, finance director; Shabir Chowdhury, sales director

Greenhouse Group
Franchises: Daf 4; Fi 1; Ford 1; Ford LCV 1; Niss 1; Vx 1; VW LCV 1
Key executives: Derek Passant, chief executive; Mike Pawson, finance director; Ashley Passant, managing director

Grevan Cars
Franchises: BMW 3; Mini 3; Other 5
Key executives: Graham De Val, managing director; Ian Phillips, finance director; Michael Evans, chairman

Group 1 Automotive
Franchises: Au 10; BMW 9; Cit 1; Ford 5; Ford LCV 2; Jag 4; Kia 2; LR 4; MB 5; Mini 9; Seat 4; Ško 3; Sm 3; Toy 2; VW 11; VW LCV 4; Other 2
Key executives: Daryl Kenningham, chief executive; Mark Bridgland, managing director; Daniel McHenry, chief financial officer

H
Halliwell Jones Group
Franchises: BMW 5; Mini 5
Key executives: Phillip Jones, managing director; Glyn Howes, finance director; James Houghton, sales director

Hartwell
Franchises: Ford 10; Ford LCV 4
Key executives: Kevin Godfrey, managing director; Atiq Rehman, director

Harwoods Group
Franchises: AM 1; Au 4; Ben 2; Jag 5; LR 6; Mcl 1; Vo 1; Other 1
Key executives: Guy Harwood, chairman; Archie Harwood, chief executive; Guy Rowson, finance director; Scott Paddock, group operations director

Key to franchise abbreviations: Abar **Abarth**; AM **Aston Martin**; AR **Alfa Romeo**; Au **Audi**; Bn **Bentley**; Bug **Bugatti**; BMW **BMW**; Cit **Citroën**; Cit LCV **Citroën Vans**; Dac **Dacia**; Daf **Daf**; Fe **Ferrari**; Fi **Fiat**; Fi LCV **Fiat Vans**; Ford **Ford**; Ford LCV **Ford Vans**; Ho **Honda**; Hy **Hyundai**; Inf **Infiniti**; Iv **Iveco**; Isz **Isuzu**; Jag **Jaguar**; Jeep **Jeep**; Kia **Kia**; Lamb **Lamborghini**; LR **Land Rover**; Lex **Lexus**; Lo **Lotus**; Mas **Maserati**; Maz **Mazda**; Mcl **McLaren**; MB **Mercedes-Benz**; MB Truck **Mercedes-Benz Trucks**; MB LCV **Mercedes-Benz Vans**; MG **MG**; Mini **Mini**; Mor **Morgan**; Niss **Nissan**; Niss LCV **Nissan Vans**; Peu **Peugeot**; Peu LCV **Peugeot Vans**; Por **Porsche**; Ren **Renault**; Ren LCV **Renault Vans**; Ren Truck **Renault Trucks**; RR **Rolls-Royce**; Seat **Seat**; Ško **Škoda**; Sm **Smart**; SsY **SsangYong**; Sub **Subaru**; Suz **Suzuki**; Toy **Toyota**; Toy LCV **Toyota Vans**; Vo **Volvo**; Vot **Volvo Trucks**; VW **Volkswagen**; VW LCV **Volkswagen Vans**; Vx **Vauxhall**; Vx LCV **Vauxhall Vans**



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Hatfields

Franchises: Jag 5; LR 4

Key executives: Gareth Williams, managing director; Philip Bennett, head of finance; Craig Petty, sales director; Stuart Baldwin, group service director; Kevin Walter, group parts manager

Helston Garages Group

Franchises: Au 1; BMW 5; Fer 1; Jag 3; LR 4; Mini 5; Peu 5; Por 1; Ško 4; VW 2; VW LCV 2; Vo 5

Key executives: David Carr, co-owner; Betty Carr, co-owner; Andrew Barrett, managing director; Craig Glanville, financial director; Sarah Hurley, director

Hendy Group

Franchises: Dac 8; Ford 11; Ford LCV 6; Ho 4; Hy 2; Iv 3; Jag 2; Kia 5; LR 3; Lex 1; Lo 3; Maz 4; MG 3; Niss 3; Ren 8; Seat 1; Ško 2; Suz 1; Toy 3; Other 3

Key executives: Paul Hendy, chief executive; Jonathan Moritz, chief financial officer; Simon Bottomley, chief operating officer

Heritage Automotive

Franchises: Au 2; Ho 1; Seat 2; Ško 4; VW 6; VW LCV 2; Other 10

Key executives: Paul Hrachovec, managing director; Richard Neulander, director; Nick Hinnallas, director

Howards Group

Franchises: Cit 2; DS 1; Ho 2; Hy 4; Kia 1; MG 2; Niss 1; Peu 4; Suz 1; Toy 1

Key executives: Peter Coleman, chairman; Peter Hayes, managing director; David Backes, finance director

HR Owen

Franchises: AM 2; Bn 4; Bug 1; Fe 2; Lamb 4; Mas 2; RR 1; Other 3

Key executives: Ken Choo, chief executive; Manish Patel, finance director

I

Inchape

Franchises: Au 5; BMW 5; Jag 6; LR 6; Lex 4; MB 12; Mini 5; Por 2; Sm 8; Toy 8; VW 13; VW LCV 1

Key executives: Alex Merricks, retail operations director; Stephen Hill, chief financial officer; Louise Manzano, talent & organisational development director; Claire Price, marketing director

J

Jardine Motors Group

Franchises: AM 1; Au 12; BMW 2; Fe 2; Jag 5; LR 6; Mas 1; McL 2; MB 5; Mini 2; Por 4; Sm 3; Other 3

Key executives: Neil Williamson, chief executive; David Muir, finance director; Clare Martin, HR director

JCB Group

Franchises: Cit 1; Dac 3; Hon 1; Kia 2; MB LCV 1; Ren 3; Seat 2; Ško 2; SsY 1; Suz 1; VW 2; VW LCV 5; Other 2

Key executives: Jonathan Bischoff, managing director

JCT600

Franchises: AM 1; Au 7; Ben 2; Cit 1; Fer 2; Kia 1; LR 1; Lo 1; Mas 1; Maz 2; MB 5; MG 1; Peu 1; Por 5; RR 1; Seat 3; Sm 2; Vx 1; VW 5; VW LCV 3; Other 2

Key executives: John Tordoff, chief executive; Ian Tordoff, director; Nigel Shaw, finance director; Richard Hargraves, managing director

Jemca Car Group

Franchises: Lex 4; Toy 7

Key executives: Hiroyuki Niwa, chairman and chief executive; David Collis, president; Gary Brown, chief finance officer; Simon Boxall, chief operating officer

John Clark Motor Group

Franchises: Au 2; BMW 2; Dac 1; Jag 4; LR 6; Mini 2; Niss 1; Ren 1; Seat 2; Ško 3; VW 3; VW LCV 1; Vo 2; Other 5

Key executives: John Clark, chairman; Christopher Clark, managing director; Alan McIntosh, finance director

John Grose Group

Franchises: Cit 1; DS 1; Ford 4; Ford LCV 1; Kia 1; Peu 1

Key executives: Ian Twinley, chairman; Richard Howard, managing director; Steve Syrett, aftersales director; David Billison, sales director

Johnsons Cars

Franchises: Abar 2; AR 2; Fi 2; Fi LCV 1; Ford 2; Ho 4; Hy 6; Jeep 2; Lex 1; Maz 5; Seat 4; Ško 7; Suz 2; Toy 3; VW 11; Vo 2; Other 2

Key executives: Martin Sumner, managing director; Mike Berwick, operations director; Richard Martin, finance director; Jonathan Dale, IT director; James Dale, director

L

Listers

Franchises: Au 4; BMW 2; Ho 3; Jag 2; LR 3; Lex 3; MB 4; Mini 2; Por 1; Seat 2; Ško 1; Sm 2; Toy 7; VW 7; VW LCV 3; Vo 2; Other 3

Key executives: Keith Bradshaw, chairman; Terence Lister, managing director; Geoffrey Lister, chief executive; Timothy Bradshaw, chief operating officer; Antony Dadd, director of finance

Lloyd Motors

Franchises: BMW 6; Jag 2; Kia 2; LR 4; Mini 6; Vo 1; Other 3

Key executives: Brian Lloyd, managing director; Samuel Lloyd, director

Lookers

Franchises: AM 1; Au 13; BMW 3; Bn 1; Dac 7; Cit 1; DS 1; Fe 1; Ford 10; Ford LCV 6; Hy 1; Jag 4; Jeep 1; Kia 4; LR 8; Lex 1; Mas 1; MB 13; Mini 3; Niss 8; Peu 1; Ren 7; Seat 2; Ško 4; Sm 12; Toy 3; Vx 15; VW 13; VW LCV 5; Vo 3; Other 2

Key executives: Mark Raban, chief executive; Ian Bull, chairman; Duncan McPhee, chief operating officer; Andy Garratt, chief information officer

LSH Auto UK

Franchises: MB 6; MB LCV 3; Sm 3

Key executives: Martyn Webb, managing director; Masim Syed, chief financial officer; Ian Williams, head of HR; Norman McKeown, head of IT

M

Marriott Motor Group

Franchises: Au 3; Dac 1; Ren 1; Ško 1; VW 4; VW LCV 1

Key executives: Paul Barnard, managing director; Ian Woodward, operations director; Steven Bridges, finance director

Marsh Wall

Franchises: BMW 3; Mini 2

Key executives: Wayne Berry, managing director; Deborah Lowles, finance director; John Naylor, non-exec director

Marshall Motor Holdings

Franchises: Au 12; BMW 5; Ford 2; Ford LCV 2; Ho 7; Hy 7; Jag 7; Lex 6; LR 9; MB 8; MB LCV 4; MB Truck 4; Mini 4; Niss 9; Peu 7; Seat 4; Ško 15; Sm 5; Toy 13; Vx 2; Vx LCV 2; VW 18; VW LCV 6; Vo 9; Other 6

Key executives: Tim Lampert, chief financial officer; Jo Moxon, HR director; Jamie Crowther, operations director; Jon Head, commercial director

Mercedes-Benz Retail Group

Franchises: MB 3; MB LCV 1; Sm 3

Key executives: Angela Shepherd, chief executive; Paul Sames, director; Tim Schoeler, chief financial officer

Mon Motors

Franchises: Au 3; Ford 3; Ford LCV 1; Seat 1; Ško 1; VW 2; Vo 1

Key executives: Jeffrey Cleverly, chairman; Gavin Cleverly, managing director; Roger Moore, finance director; Gareth Cleverly, director

Motus UK (incl. Pentagon Group)

Franchises: Cit 2; Dac 2; Ford 3; Ford LCV 1; Kia 1; Maz 1; Niss 1; Peu 5; Ren 3; Seat 4; Vx 9; Vx LCV 6; Other 1

Key executives: David Peel, managing director, Pentagon; Rob Truscott, chief executive Motus Group UK; Andrew Welch, chief financial officer; Lee Seward, managing director, Motus Truck & Van

P

Park's Motor Group

Franchises: BMW 3; Bn 1; Cit 1; Dac 6; Ford 4; Ford LCV 3; Ho 4; Hy 4; Jag 2; Kia 3; Lamb 1; Lex 1; Lo 1; LR 2; Mas 1; Maz 2; McL 2; MG 2; Mini 3; Niss 4; Peu 2; Ren 6; Ško 2; Suz 3; Toy 4; Vo 1; Other 1

Key executives: Douglas Park, chairman and managing director; Alasdair Noble, finance director; William Cumming, aftersales director; Graeme Park, director; Ross Park, director

Parkway Derby

Franchises: VW 4; VW LCV 2

Sean Booth, managing director

Partridge of Hampshire

Franchises: BMW 1; Mini 1

Toby Partridge, managing director

Pendragon

Franchises: AM 3; BMW 7; Cit 11; Dac 6; Daf 3; DS 2; Fer 1; Ford 33; Ford LCV 2; Hy 2; Jag 6; Kia 2; LR 5; MB 8; Mini 7; Niss 4; Peu 5; Por 6; Ren 7; Sm 2; Vx 19

Bill Berman, chief executive; Martin Casha, chief operating officer; Mark Willis, chief financial officer; Kim Costello, chief marketing officer; Ian Filby, chairman

Peoples

Franchises: Ford 6; Ford LCV 3

Brian Gilda, chairman and managing director; Stewart Ramsay, finance director

Perrys Group

Franchises: Cit 4; Ford 7; Ford LCV 4; Hy 1; Kia 5; Maz 7; MG 3; Peu 7; Seat 3; Vx 13; Vx LCV 1; Other 1

Key executives: Darren Ardron, managing director; Richard Ingram, chairman; Ken Savage, commercial director; Denise Millard, director; Neil Taylor, finance director

Peter Vardy

Franchises: BMW 1; Jag 1; LR 1; Mini 1; Por 2

Key executives: Peter Vardy, chief executive; Sir Peter Vardy, chairman; Claire Maith, chief financial officer

Porsche Retail Group

Franchises: Por 5

Key executives: Adam Flint, managing director; Andrew Coates, head of finance

Key to franchise abbreviations: Abar **Abarth**; AM **Aston Martin**; AR **Alfa Romeo**; Au **Audi**; Bn **Bentley**; Bug **Bugatti**; BMW **BMW**; Cit **Citroën**; Cit LCV **Citroën Vans**; Dac **Dacia**; Daf **Daf**; Fe **Ferrari**; Fi **Fiat**; Fi LCV **Fiat Vans**; Ford **Ford**; Ford LCV **Ford Vans**; Ho **Honda**; Hy **Hyundai**; Inf **Infiniti**; Iv **Iveco**; Isz **Isuzu**; Jag **Jaguar**; Jeep **Jeep**; Kia **Kia**; Lamb **Lamborghini**; LR **Land Rover**; Lex **Lexus**; Lo **Lotus**; Mas **Maserati**; Maz **Mazda**; McL **McLaren**; MB **Mercedes-Benz**; MB Truck **Mercedes-Benz Trucks**; MB LCV **Mercedes-Benz Vans**; MG **MG**; Mini **Mini**; Mor **Morgan**; Niss **Nissan**; Niss LCV **Nissan Vans**; Peu **Peugeot**; Peu LCV **Peugeot Vans**; Por **Porsche**; Ren **Renault**; Ren LCV **Renault Vans**; Ren Truck **Renault Trucks**; RR **Rolls-Royce**; Seat **Seat**; Ško **Škoda**; Sm **Smart**; SsY **SsangYong**; Sub **Subaru**; Suz **Suzuki**; Toy **Toyota**; Toy LCV **Toyota Vans**; Vo **Volvo**; Vot **Volvo Trucks**; VW **Volkswagen**; VW LCV **Volkswagen Vans**; Vx **Vauxhall**; Vx LCV **Vauxhall Vans**

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PSA Retail UK**Franchises:** Abar 2; Cit 17; DS 6; Fi 2; Peu 24; Vx 7**Key executives:** James Weston, chief executive; Simon Lawrence, chief financial officer; Bryn Thomas, finance director; Richard Garbutt, sales director; Simon Tarrant, aftersales director**R****Renault Retail Group****Franchises:** Dac 12; Niss 1; Ren 12; Other 5**Key executives:** Ludovic Troyes, managing director; Scott Kilbourne, finance director; Rachel Manley, HR director; Robert O'Reilly, commercial director; Elina Karppinen, marketing director**Richmond Cars****Franchises:** Cit 1; Hy 3; MG 3; Ško 2; Suz 4**Key executives:** Michael Nobes, chief executive; Sam Nobes, operations director**Riverside Motors Group****Franchises:** Ho 1; Seat 1; Vo 3; Other 1**Key executives:** Mark Denton, managing director; Stephen Wright, operations director**RRG Group and Norton Way Motors****Franchises:** Cit 1; Ho 3; Kia 2; Lex 2; Maz 2; MG 1; Niss 2; Peu 3; Ško 3; Toy 11; Other 3**Key executives:** Toru Masuyama, chairman Marubeni Auto Investment UK; Arran Bangham, vice-chairman RRG Group; David Grainger, managing director Norton Way Motors**Rybrook Holdings****Franchises:** Bn 1; BMW 4; Jag 1; Lamb 1; LR 3; Lo 2; Mcl 1; Mini 4; Por 1; RR 1; Vo 4; Other 4**Key executives:** Henry Whale, chief executive; Peter Whale, chairman; Jatinder Nurpuri, finance director**S****Sandicliffe Motor Group****Franchises:** Ford 3; Ford LCV 2; Maz 3; MG 1; Niss 2; Other 2**Key executives:** Andrew Woodhouse, chairman; Paul Woodhouse, managing director; Nicholas Woodhouse, company secretary; Tom Barton, director**Sandown Motors****Franchises:** MB 7; Sm 4**Key executives:** Gavin McAllister, managing director; Gareth Copling, group financial director**SG Petch****Franchises:** Abar 3; AR 1; Fi 3; Fi LCV 2; Hy 3; Is 1; Jeep 1; Kia 4; Maz 4; Niss 1; Peu 1; Seat 2**Key executives:** Steve Petch, managing director; Samantha Petch, sales and marketing director; Shaun Burke, sales director; Andrew Hodgson, aftersales director; Simon Rees, finance director**Sinclair Group****Franchises:** Au 2; Hy 1; Jag 1; LR 4; MB 4; Seat 1; Ško 1; Sm 1; VW 6; VW LCV 2; Other 1**Key executives:** Gerald Sinclair, chairman, Andrew Sinclair, managing director, Jonathan Sinclair, director**Snows Motor Group****Franchises:** Abar 4; AR 1; BMW 2; Dac 1; Fi 4; Jeep 2; Kia 3; Lex 2; Maz 2; MB LCV 1; Mini 2; Peu 4; Ren 1; Seat 5; Toy 9; Vx 2; VW LCV 1; Vo 2; Other 3**Key executives:** Stephen Snow, chairman and chief executive; Neil McCue, chief operational officer; Alex Domone, chief operational officer; Shawn Gates, chief financial officer**Stephen James Group****Franchises:** BMW 5; Mini 3**Key executives:** Richard Ennis, managing director; Peter Williams, finance**Steven Eagell****Franchises:** Lex 8; Toy 23**Key executives:** Steven Eagell, chief executive; Gary Smith, managing director; David Sherriff, finance director; Bryan Portsmouth, operations director**Stoneacre Motor Group****Franchises:** Abar 10; AM 1; AR 4; Cit 2; Dac 6; Fi 21; Fi LCV 1; Ford 8; Ford LCV 2; Ho 3; Hy 2; Jeep 5; Kia 5; Lex 2; Maz 5; MG 6; Niss 1; Peu 6; Ren 6; Seat 4; Suz 11; Toy 7; Vx 2; Vo 8; Other 4**Key executives:** Richard Teatum, chairman; Shaun Foweather, managing director; Nigel Wood, finance director; Gerry George, aftersales director; Philip Wade, franchise & development director**Swansway Garages****Franchises:** Au 6; Ho 2; Jag 1; LR 1; Peu 1; Seat 1; VW 3; VW LCV 5; Other 1**Key executives:** Michael Smyth, chairman; Peter Smyth, director; David Smyth, director; John Smyth, director; Richard Marsland, finance director**Sytner****Franchises:** AM 1; Au 12; Ben 4; BMW 18; Fer 5; Jag 7; Lamb 3; LR 11; Mas 4; Mcl 1; MB 20; Mini 18; Por 6; RR 2; Seat 1; Ško 1; Sm 12; VW 1; VW LCV 1; Vo 1; Other 1**Key executives:** Darren Edwards, chief executive; Adam Collinson, chief financial officer; Melvin Rogers, HR director; Jeremy Mallett, director**T****TC Harrison Group****Franchises:** Ford 7; Ford LCV 3; Other 6**Key executives:** Christopher Cornell, chief executive; James Harrison, chairman; William Harrison, joint deputy chairman; Jonathan Harrison, joint deputy chairman; Tim Simcox, finance director and company secretary**TG Holdcroft****Franchises:** Dac 4; Ho 5; Hy 7; Maz 2; MG 3; Niss 3; Ren 4; Vo 1; Other 1**Key executives:** Darren Holdcroft, managing director; Neil Rudge, operations director; Martin McCormick, finance director**Thurlow Nunn****Franchises:** Peu 1, Vx 10**Key executives:** Will Tew, managing director; Ashleigh Lewis, chief financial officer; Simon Grylls, sales director**Toomeys****Franchises:** Cit 2; Dac 2; DS 1; MG 1; Niss 2; Peu 2; Ren 2; Vx 2; Vx LCV 2**Key executives:** Michael Toomey, director, Jonathan Brook, director; Paul Plant, director**TrustFord****Franchises:** Ford 27; Ford LCV 20**Key executives:** Julia Greenhough, marketing director; Stuart Mustoe, finance director; John Leeman, operations director; Sharon Ashcroft, HR director; Stuart Cresswell, aftersales director**V****Vantage Motor Group****Franchises:** Kia 1; Lexus 2; Ško 1; Toy 9**Key executives:** Phil White, chairman; Andrew Mallory, chief operating officer; Tim Swindin, chief financial officer**Vertu Motors****Franchises:** Au 1; BMW 5; Cit 6; Dac 9; DS 1; Ford 20; Ford LCV 1; Ho 14; Hy 11; Jag 3; Kia 2; LR 6; Maz 2; MB 5; MB LCV 1; MG 3; Mini 5; Niss 9; Peu 6; Ren 8; Seat 4; Ško 4; Sm 2; Toy 3; Vx 14; Vx LCV 1; VW 9; VW LCV 1; Other 8**Key executives:** Andy Goss, non-exec chairman; Robert Forrester, chief executive; David Crane, chief operations officer; Karen Anderson, chief financial officer; Liz Cope, chief marketing officer**Vindis Group****Franchises:** Au 5; Ben 1; Seat 1; Ško 2; VW 4; VW LCV 2; Other 2**Key executives:** Jamie Vindis, managing director; Gary Vindis, chairman; Stephen Fossey, finance director**Vines Group****Franchises:** BMW 3; Mini 3; Other 1**Key executives:** Sean Kelly, managing director**Vospers****Franchises:** Abar 3; AR 1; Dac 1; Fi 3; Fi LCV 3; Ford 3; Ford LCV 3; Jeep 1; Maz 3; Niss 1; Niss LCV 1; Peu 2; Peu LCV 1; Ren 1; Seat 1**Key executives:** Peter Vosper, chairman; Nick Vosper, managing director; Jonathan Tremain, sales director; Neil Tickner, aftersales director; Mark Haslam, contact and communications director; Paul Rogers, finance director**VT Holdings****Franchises:** Abar 1; Dac 1; Hy 2; Kia 4; Maz 1; Niss 4; Peu 1; Ren 1**Key executives:** Tim Bagnall, director; Andrew Dunne, head of finance; Mark Pardoe, director; Chris Wiseman, director**W****Waylands Automotive****Franchises:** Kia 2; MG 2; Vo 5**Key executives:** John O'Hanlon, chief executive; Richard Spencer, aftersales director; James Smullen, finance director; April Wyatt, head of marketing**William Morgan Group****Franchises:** BMW 2; Mini 2; Other 2**Key executives:** William Le Fevre, managing director**Williams Motor Company****Franchises:** BMW 5; Jag 1; LR 1; Mini 5; Other 1**Key executives:** Margaret Orton Williams, chair; William Adams, managing director; Michael Sherwin, non-exec director**WR Davies****Franchises:** Cit 1; Dac 1; DS 1; Ford 3; Niss 2; Ren 1; Toy 3**Key executives:** Jonathan Davies, managing director; Doug Conway, director; Bernard Pritchard, company secretary**Y****Yeomans****Franchises:** Cit 4; DS 1; Ho 5; Hy 1; Niss 4; Peu 3; Toy 3; Vx 1; Other 1**Key executives:** James Smith, chairman and managing director; Kevin Newitt, operations director; David Hamilton Brown, director

Key to franchise abbreviations: Abar **Abarth**; AM **Aston Martin**; AR **Alfa Romeo**; Au **Audi**; Bn **Bentley**; Bug **Bugatti**; BMW **BMW**; Cit **Citroën**; Cit LCV **Citroën Vans**; Dac **Dacia**; Daf **Daf**; Fe **Ferrari**; Fi **Fiat**; Fi LCV **Fiat Vans**; Ford **Ford**; Ford LCV **Ford Vans**; Ho **Honda**; Hy **Hyundai**; Inf **Infiniti**; Iv **Iveco**; Isz **Isuzu**; Jag **Jaguar**; Jeep **Jeep**; Kia **Kia**; Lamb **Lamborghini**; LR **Land Rover**; Lex **Lexus**; Lo **Lotus**; Mas **Maserati**; Maz **Mazda**; Mcl **McLaren**; MB **Mercedes-Benz**; MB Truck **Mercedes-Benz Trucks**; MB LCV **Mercedes-Benz Vans**; MG **MG**; Mini **Mini**; Mor **Morgan**; Niss **Nissan**; Niss LCV **Nissan Vans**; Peu **Peugeot**; Peu LCV **Peugeot Vans**; Por **Porsche**; Ren **Renault**; Ren LCV **Renault Vans**; Ren Truck **Renault Trucks**; RR **Rolls-Royce**; Seat **Seat**; Ško **Škoda**; Sm **Smart**; SsY **SsangYong**; Sub **Subaru**; Suz **Suzuki**; Toy **Toyota**; Toy LCV **Toyota Vans**; Vo **Volvo**; Vot **Volvo Trucks**; VW **Volkswagen**; VW LCV **Volkswagen Vans**; Vx **Vauxhall**; Vx LCV **Vauxhall Vans**

An aerial photograph of a silver SUV driving on a paved road. The road has white dashed lane markings. The car is positioned in the lower center of the frame, moving towards the top. The surrounding area is filled with lush green trees and foliage, with shadows cast onto the road. The overall scene is bright and clear.

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VIEW FROM THE TOP

AM asked a selection of automotive retail chief executives, managing directors and directors from a variety of groups and businesses for their views on the current climate and what they expect to be on the horizon in 2023

Car retailers across the UK were stunned by the strength of their 2021 trading performance after efforts to adapt to the challenge of trading in the pandemic were followed by a bounce back in consumer demand.

Here, AM speaks to five of the sector's top business leaders as they reflect on a period defined by unease,

uncertainty, unexpectedly positive business outcomes and the sharpening of strategic focus that will need to follow.

Our interviewees are: Darren Ardron (DA), managing director, Perrys Motor Sales; Paul Brayley (PB), managing director, Brayleys Cars; John Caney (JC), chief executive, Endeavour Automotive; Mark Mitchell (MM), managing director, Mitchell Group; and Swansway Group director Peter Smyth (PS).



HOW PLEASED WERE YOU WITH YOUR GROUP'S 2021 TRADING PERFORMANCE?

DA: Our 2021 trading was good. As a

board and a group we're delighted with it. Our annual results were the second best we've ever experienced and the best with our current franchises, our record being achieved at a time when we still had Jaguar Land Rover (JLR) sites in the mix. After a tough period of COVID it was good to be able to look back and see how everything just came together in the end.

PB: I was very pleased with the

group's 2021 trading performance. In fact, you could say I was very relieved to have ended the year with such a strong result, given we were under a government-mandated lockdown that required us to close all car showrooms between December 2020 and mid-April 2021. Speaking with colleagues across the industry, our results were in keeping with those being achieved elsewhere.

JC: The trading performance for the group in 2021 was particularly pleasing despite the challenges the business faced during the year as a result of the coronavirus pandemic, specifically in Q1 where London was still in lockdown, along with the continued challenge of new vehicle supply issues in the second half of 2021.

MM: I was very pleased with our trading results for 2021. All credit must go to our three dealerships and our three departments. Our turnover increased 17% from £48m to £57m and our profit before tax increased 37% from £2.7m to £3.7m, which represented a 6.5% return on sales. We were in a supply stop-go situation for good parts of the year. We had to work very hard to procure stock and secure part-exchanges to keep our forecourts filled. Many of our colleagues also had to cope with the impact of COVID, of course. We had two colleagues hospitalised. It's all too easy to forget what a tough period it was for so many people in the business, and for customers too.

PS: We were delighted by the group's performance in 2022, but we did benefit from a number of tailwinds, most notably a shortage of new cars that helped our margin on used. Unprecedented appreciation of 30% meant that, even if your stock management wasn't up to scratch, you were still onto a winner. We also didn't have to pay rates which saved us £1.6m. If there was any retailer who didn't make money in 2021 then they shouldn't really be trading.



WHAT HELPED YOU WITH THAT ACHIEVEMENT?

DA: The sector appeared to be heading into the perfect storm, but in many ways, it affected us in a positive fashion from a business point-of-



Darren Ardron,
managing director,
Perrys Motor Sales

view. We were running parts of the business with reduced expenses and, in many cases, unusually high margins. Some of the margin was through the roof. There was a positive mindset from consumers as we headed out of COVID lockdowns and before we encountered the issues that we have now. For once, we got some tailwinds and there was also a great effort from the whole team to pull the business through. I think everyone was up for it. We were also really pleased with how our new dealerships – the new MG locations and a Mazda site in Devon among them – have settled into the business.

PB: Undoubtedly, the continued support we received from the UK Government in 2021 helped with our results. However, by far the biggest factor was the short supply that new – and subsequently used – vehicles had on market prices. With demand outstripping supply, strong margins

could be retained that offset the reduced revenue we were seeing in this supply-constrained market.

JC: The result of the supply shortages and, in turn, the reduced number of new vehicle registrations meant the demand for used cars was exceptional with demand exceeding supply. During the year, the group continued to work on its digital capabilities and operational efficiencies. Those efficiencies enabled a motivated, focused team to deliver on achieving their objectives. We also realigned objectives in line with recognising the importance of customer touchpoints, supported by those enhanced digital capabilities assisting management to react accordingly.

MM: I think the closeness of the team. We have 100 colleagues that have combined 1,000 years of service. We recently issued three 25-year long service awards. I think the work done to maintain morale and the

company's culture was very important and a great amount of credit must go to our eight-strong leadership team who reassured and supported staff in a variety of ways, including home visits in some cases. We did pay one-off bonus payments in the summer and winter, which were well received, and in light of our 2021 performance we are also making another £1,000 cost-of-living support payment to all our colleagues irrespective of how long they have worked with us. We have also notified all colleagues that they will be receiving the highest wage increase that they have received from us in 10 years.

PS: We managed our used stock well. We also began a 20-minute daily meeting of the eight most senior people in the business, at 9.30am, to ensure we are on top of any issues or performance shortfalls. That proved immensely successful and is something we will continue to



2022 Automotive Reputation Report

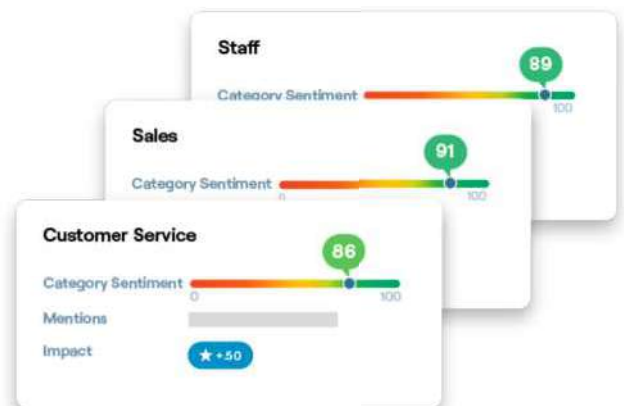
We analysed over 35,000 dealerships globally, including 15,000 in Europe, to deliver actionable insights that help automotive dealerships & OEMs like you improve operations and drive revenue.

What Do Consumers Think of Car Dealerships?

The Reputation Data Science team examined 5 million ratings and reviews to find out the sector's strengths & weaknesses:

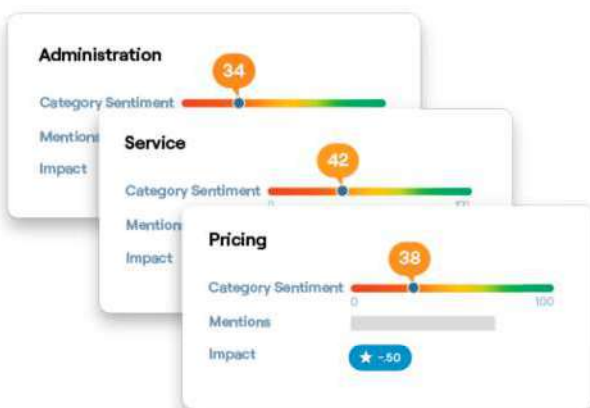
STRENGTHS: Customer Service, Sales, and Staff

Positive reviews often mention salespeople by name for their knowledge, attention to detail, and commitment to helping customers find the right car for their needs. The most positive reviews about service emphasised the quality of service throughout the entire buying process.



WEAKNESSES: Pricing, Service, and Administration

Customers don't like their experience in the service lane. Long wait times, as well as inadequate repair, factored heavily into criticisms. Issues with the service lane also overlapped with other big drivers of negative sentiment: pricing and administration.



Reputation

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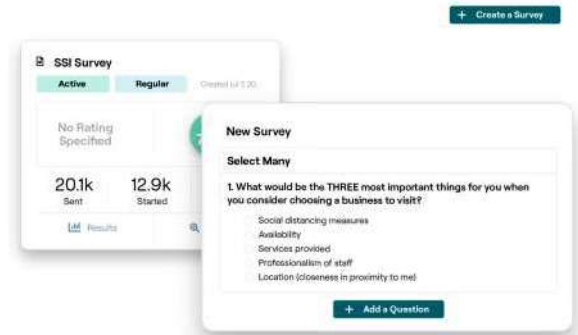
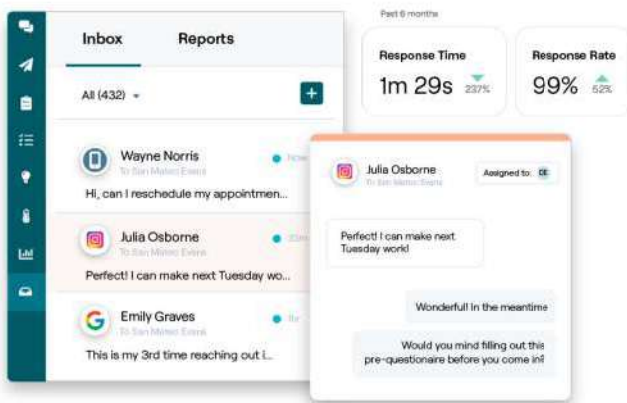
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do. In no way did we exit 2021 thinking that we had become business geniuses, though. We know how good the market was for the motor trade last year.



WHAT WERE THE MAIN CHALLENGES INVOLVED?

DA: Stock procurement. It was a massive challenge last year and still is. The benefit of that is that our forward order bank for new cars remains as healthy now as it was last year and we've been able to keep that momentum of sales we needed. The people side of the business remains a huge challenge right now, and particularly the recruitment of technicians. In aftersales, we've also got issues with parts shortages which are leaving us with a lot of work-in-progress in our workshops. Obviously, the other major issue is general cost creep. Even through 2021 we were increasingly aware of the need to be aware of costs and keep close tabs, but it was nothing like it is now, of course.

PB: The biggest challenge we faced was non-financial. Our number one priority was, and remains, the well-being of our team throughout these very uncertain times. Second to that would be the very steep learning curve we faced in transitioning our business to provide omnichannel bricks 'n' clicks pathways for car sales and aftersales customers. We found that some customers did not always feel confident in the immediate post-pandemic period to visit shops, showrooms and other retail outlets other than when essential. Add into that mix the growing supply constraint manufacturers began facing with the continuing chip shortages, leading to very extended lead times. Historically, the brands we represent had never really operated with extended delivery times and large forward order banks. Managing customer expectations in these scenarios is a skill that we have had to learn very fast indeed.

JC: The economic and political uncertainty continued to have a damaging impact on consumer confidence and the overall market, particularly in London along with the continued challenge of new vehicle supply.

MM: March was the anniversary of



Paul Brayley,
managing director,
Brayleys Cars



lockdown one. That feels like yonks ago now but, at the time, our teams were having to adapt fast to a different way of working. We were writing business remotely. Throughout 2021 we were coming to terms with new ways of doing business. The focus was very much on colleague and customer safety and wellbeing and let's not forget that as recently as nine months ago we were still wearing masks in the dealership.

PS: I think the biggest challenge of 2021 was retaining and attracting quality staff into the business. We found that a massive, massive challenge and we have had to move with the marketplace. Initially, we felt that working from home simply wasn't part of the Swansway DNA and we weren't going to do it. Most recently, though, we have introduced flexible working into our contact centre in an effort to make those roles appeal to the people we need. If we didn't acknowledge that shift, then we'd no longer have a business. The technician shortage has also been a huge issue, with our charge

out rate – particularly on service plan work – starting to challenge the labour rate we pay. I understand that, in London, there are master techs on £70,000 a year. At the other end of the spectrum, we've struggled to attract staff to do the basic jobs such as valeting and it could be that Brexit had a part to play in that.



HOW HAS TRADING PERFORMANCE BEEN SO FAR IN 2022?

DA: It's certainly not a disaster, but not quite as strong as last year. People always compare with the previous year's trading, but this time we have to accept that 2021 was a very unusual year indeed and we'll be back on that. New car supply is starting to return. September was a long way off what we had budgeted

for, but I'm quite confident now about the fourth quarter. If everything arrives that we are told will arrive, then it will be good. At the moment, the economic and political outlook is very depressing, of course, and I am concerned that our customers will feel under pressure from that. It makes me glad that we have those strong order banks to fall back on. We have seen some customers pulling out of orders before they arrive but, so far, the demand has been there to ensure another buyer will quickly snap up anything that is cancelled.

PB: Trading has been excellent in 2022. This is despite new vehicle supply constraints worsening, re-enforcing the continued market dynamics of supply and demand across new and used vehicle margins. The one area of concern I am acting on is aftersales. Low new car sales volumes post-pandemic are impacting workshop throughput. It's important we start to act on that ahead of the curve and don't wait until it is too late for an effective recovery

strategy to be in place.

JC: The group has continued to trade ahead of forecast for 2022 despite the political uncertainty with a new Government in office and significant increase in cost base. It is a positive position however, with supply constraints easing into Q4, and the group is expected to deliver a very robust financial result for 2022.

MM: We have been very supply constrained and it has been disappointing how some of our manufacturer partners have responded to the challenges. In one case we are 50% down on where we were this time last year. Having said that, our used car margins are our best ever, our stock turn is fast, and our Škoda business is mirroring where we were last year. Aftersales is looking after itself okay.

PS: We had thought that the chip shortage would ease and there'd be lots of cars this year. That hasn't proved to be the case. Having said that, even though we've had no rebate from Government and the soaring used car prices have eased off, I think the group's performance will still be 80-to-85% of what it was last year, which is really pleasing. Our margin has been really strong. Customers have gotten out of the habit of asking for a discount and the stock shortage has made the same happen in fleet. This year has also seen us leverage connected technology to retain customers. When we used (IHS Market's) Polk to alert a customer to aftersales work we got around one response for every five enquiries. When they have received an alert to their car it's the opposite scenario, and we get a response from four-in-five.

THIS YEAR (2022), WITH COSTS



SOARING, HOW HAS THE BUSINESS MITIGATED SPENDING TO DRIVE PROFITABILITY?

DA: One of the things we have been more proactive with is being more diverse as a business. We have grown our rental department and we've also started a separate cosmetic repair division. Unfortunately, we've just had to suck up the energy cost rises. We had introduced energy champions a few years ago,



so we were already keeping close tabs on our spending there. More recently, we have adjusted our opening hours quite significantly in a way that will not only mitigate against those energy costs but also plays a positive part in achieving a better work/life balance for Perrys' staff.

PB: To tell the truth we are not a variable cost heavy business. Most of our teams are engaged in productive activities, be that on the showroom floor or through our aftersales operations. We have always and will continue to embrace technology that both adds value to our customer experience and brings operating efficiencies to our businesses. Some examples of this would be the introduction of a full IVR telephony solution in Q4 2020, our use of paperless sales admin, and the use of technology to allow used vehicle images to be taken and put online in minutes, enabling us to operate with fewer staff.

JC: A continued focus and significant due diligence on our cost base has mitigated wastage along with biweekly reviews of expenditure making sure budget spend is in line

with expectations. We have continued to focus on operational efficiencies to further improve performance and make savings where possible.

MM: Costs have gone up across the board. In aftersales we're really struggling to raise our charge-out rates for customers. Our electricity bill has gone up from £60,000 to £170,000 so we have now nominated a member of the finance team to monitor our usage daily. If I was 35, I may have installed a solar panel or two, but the payback looks to be about 10 years.

PS: The business has been a lot more scientific in terms of its spend in marketing. The market being a pull market, rather than a push one, I think we've realised that's something we can look hard at and be more selective with. There is huge pressure on wages, but it's hard to mitigate against. The energy issue is something that we've yet to feel the brunt of. The business is very fortunate that it's on a long-term fixed contract. One area we need to be mindful of is the growth strategy. Dealers coming out of the most successful two years trading in their

history are demanding top dollar for their business and it's unrealistic. We have looked at a number of businesses. But what we are prepared to offer and what they are willing to accept remains some way apart.

WHAT DO YOU SEE AS THE



BUSINESS'S KEY OPPORTUNITIES IN THE YEAR AHEAD?

DA: I still think the used car market will be good, but we have got to start thinking outside the box. Subscription models are coming along and there's also lots to look at in aftersales upsell and, particularly, service retention. Even with all the concerns about rising costs in the workshop, if you can fix someone into a service plan and get them to pay up front you have that reassurance that they will return. You cannot upsell a motorist that has chosen not to return to



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PB: I am targeting growth in the year ahead, through acquisition and optimisation of our existing businesses, to leverage our back of house cost base across an increasing number of dealerships. For instance, we will be opening our first new motorcycle showroom in Romford later this year. If we were to stand still, with our anticipated increase in energy costs of circa £500,000 per annum, we would simply see profitability shrink as I do not envisage any huge organic growth in turnover on the horizon.

JC: The full impact of external factors is yet to be realised as we move into the winter months. Controlling the controllables while working closely with our manufacturer partners will be crucial. The supply chain will still be affected by the challenges around semi-conductor issues, however expectations are that stock will be more freely available. It is imperative that our manufacturer partners continue to monitor this position, making sure that we have the right balance of stock across the new car channels. Our continued focus on cost management, along with after-sales and used car performance, will still be the bedrock of continued growth for the group – a message that has not changed for many years.



MM: We've re-launched our free Saturday car wash and that will put us back in contact with 250 motorists each weekend. It had been two-and-a-half years since we last did it. There's a cost attached to that, but it's got a great return on investment from a marketing perspective. It's one of the core building blocks we have created the business on and central to the close relationships we have with our customers and the high retention we're able to maintain. The real opportunity, though, will be the hope that the supply starts to come back once again. Our main priority will be to retain staff morale and customers in what is a tricky time. The transition to EV is underway and brand loyalty can fade very fast if you haven't got the right zero-emissions vehicle in the right segment.

PS: I believe it is that increased connectivity and the potential for that to drive more business through our workshops. Because of the past few years' new car trading I think volumes will continue to be constrained for the next nine-to-12 months. As a result of that, though, margins should stay strong.

Two safe bets facing 2023

Get ready for a different kind of used car buyer

Fast approaching 2023, your greatest challenge may NOT be electrification or self-driving cars. Some would say that the most challenging business issue is the new, sometimes unpredictable behavior of your customers.

Car buyers in charge!

Consumers are not only better informed than ever; they've got all the tools to compare and evaluate information and sources, and to influence others. If they don't like the presentation of your cars and services, they simply move on.

Car buyers who get easily bored!

Their buying journeys almost always start online, where short attention span is a way of life. Spoilt by intense, cool visual effects and social media experiences, they may at best give your used car ad a few seconds to catch their interest.

Car buyers expecting direct access to all vital information

Most people don't expect to be spoon-fed; they are used to search for information. But they expect it to be honest, easily accessible, and easily understood.

Car buyers moving around a lot!

Every buyer is different. Some follow a carefully plotted plan to gather all relevant information. Others play around on social media or media sites, whenever they feel like it. Some may finalize the buying journey online, but most will end up in a live dialog with a salesperson. In either case, they expect seamless connections and a consistent information and impressions across all channels.

Car buyers who don't trust you!

Most car buyers know that the online world is a blurred mix of good and bad, true and false. In this uncertain world, the source is at least as important as the information itself. This is one reason why car dealers have every reason to build strong identities and brands of their own.

Stop wasting selling time on internal workflows

With intense competition, galloping inflation and interest rates ahead, you have every reason to focus on internal efficiency, too.

How many hours, honestly?

Satisfied with your current routines? Let us humbly ask you about your manual handling of the thousands of car ads every year. Creating them, handling them, publishing them on different platforms? How many hours, honestly?

Are you aware that the entire process, from the provision of basic car data and a few photos to finalized and published ads, can be 100% automated? Ready for publication on your site, on external media sites, and social?

Are you also aware that this easy move could easily pay for more effective video ads, attracting more buyers and selling all cars in your catalog faster?

Bonus: Year around dealer branding

Automated generation of consistent, higher quality ads also works as a never-ending no-nonsense dealer campaign, aimed directly at car buyers. You don't even need an advertising agency to complicate it for you.

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Johan Sundstrand
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An analysis of 10,000 car ads, independently conducted by Adevinta in Hungary in 2022, confirmed that car ads with automated video attracted 50% more viewers and helped to sell the cars 3 to 5 days later.

HAPPY INDEPENDENTS DAYS

Nearly every one of the top 10 is able to report profits – some remarkably so, reports **Tim Rose**

In 2021 the UK's 10 biggest independent dealers grew their aggregated revenue by 54% in a sign of the strength of their comeback after 2020's disruption from lockdowns.

The ID10, whose members range from single-site rare car retailers to car supermarket chains and automotive e-commerce groups, were responsible for more than

£4.2 billion-worth of sales last year, their accounts show.

All have recovered strongly from the impact their businesses suffered during COVID-related turmoil in the prior year. Almost all have made more profit – some remarkably so.

Nevertheless, some companies still bear the evidence of the headcount reduction that was carried out by many as they sought to reduce costs and adapt to a used car market with

significantly lower levels of stock.

Many of these big name independents, particularly those focused on mainstream used car sales in competition with franchised dealers, have embraced e-commerce and are ensuring consumers can take their pick online and reserve the car they're interested in.

Launched as an automotive e-commerce disrupter, Cazoo has rocketed up the top 10 table by

turnover, to become the UK's second largest independent dealer in just three years since its inception by serial entrepreneur Alex Chesterman OBE.

Cazoo's growth has been fuelled by big-budget brand marketing and numerous acquisitions, including the takeover of independent dealer group Imperial Cars in 2020 – already an ID10 ranked business – and SMH Fleet Solutions in 2021, to gain large scale preparation and logistics facilities. However profitability is nowhere to be seen. Its losses in 2021 are of a scale inconceivable to the other companies in this 2022 ID10.

Now, with investors feeling much more cautious in a tough economic climate, Cazoo is retrenching and has culled its car subscription division, cut jobs and withdrawn from nascent operations in mainland Europe.

Its ambition for £2bn turnover next year, which would put it ahead of long-standing ID10 leader Motorpoint, has now been replaced by an ambition of reaching profitability by the end of 2023.

In the short term, Motorpoint's place as the UK's largest independent dealer seems secure. Its 2021/22 financial year results showed revenues bounced back well above the £1bn mark from its 14 dealerships and, in the months since, it has continued to expand its network of outlets to 18 as of October.



THE ID10

2022 Rank (2021 ID10)	Company/trading name	Turnover 2021 £,000	Turnover 2020 £,000	Profit before tax 2021 £	Profit before tax 2020 £	No. of staff 2021	No. of staff 2020	Key executive	NO. OF SITES
1 (1)	Motorpoint	1,322,300	721,400	21,500,000	9,700,000	880	769	Mark Carpenter, chief executive	17
2 (8)	Cazoo	668,000	162,200	-549,000,000	-102,700,000	3,500	448	Paul Whitehead, chief operating officer	11
3 (3)	Available Car	402,382	308,920	3,117,000	1,464,000	639	699	Michael Bell, chief executive	4
4 (4)	Big Motoring World	370,955	304,777	6,631,820	8,765,193	525	474	Peter Waddell, chief executive	5
5 (2)	Car Giant	362,627	363,370	29,005,779	27,241,728	562	667	Michael Holahan, managing director, car operations	1
6 (5)	CarSupermarket.com (rebrand from Motor Depot)	263,611	226,025	5,957,097	5,647,871	415	423	Philip Wilkinson, director	12
7 (6)	Trade Centre Group	258,161	208,497	21,991,000	9,831,000	674	682	Tim Carr, chief executive	7
8 (7)	Saxton 4x4	195,301	168,470	8,000,783	3,322,839	131	111	Alan Austin, managing director	1
9 (New)	Redline Specialist Cars	186,202	124,782	4,411,770	1,131,289	30	31	Rob Milner, managing director	1
10 (8)	V12 Sports & Classics	177,404	147,550	5,057,249	-4,985,147	157	195	Farhad Tailor, managing director	8



Motorpoint chief executive Mark Carpenter is continuing to open more sites

Yet it is doing it differently in the 2020s. Learnings from the pandemic-driven need for e-commerce and click-and-collect have been bedded in and Motorpoint's latest showroom openings are a far cry from the five-acre supermarkets with 400+ cars on site which it steadily opened earlier this century.

Its latest sites, such as at Maidstone, Manchester and Portsmouth, display a little more than 100 cars each. However, the technology Motorpoint has at hand means customers can reserve a vehicle from entire group stock and request home delivery.

It reported that e-commerce accounted for 56% of its full year revenues. Motorpoint chief executive Mark Carpenter says: "We have always successfully adapted our business to meet every challenge and remain profitable since our inception 24 years ago.

"I am extremely pleased with the progress we have made on our medium-term strategic objectives and am convinced Motorpoint will be a winner in these rapidly evolving markets."

Motorpoint is already surpassing its pre-pandemic scale (its record 2018/19 year achieved £1.06bn revenues) and its ambition is to increase annual revenues past the £2bn mark while delivering a pain-free omnichannel experience for car buyers. Such plans suggest it won't simply pull over and allow Cazoo to overtake it without a race.

Notable for its absence from the ID10 podium positions this year is Car Giant. The vast car supermarket in north-west London, which trailed Motorpoint for many years, is yet to return to its pre-pandemic scale. The industry-wide shortage of used car stock is certainly a factor, and its dramatically lower sales volume, 40% down on 2019's 52,100 units, is reflected in a need for a significantly smaller workforce. Average employee count was at 735 in 2019, but that has been slashed by 24% to 562 within two years.

With revenue and profits down, and the business dropping to fifth in the ID10, its billionaire owner Geoff Warren may be temporarily rueing the day in 2019 that plans to relocate Car Giant and redevelop its 54-acre

plot with 6,500 homes lost the backing of the Old Oak and Park Royal Development Corporation (OPDC). OPDC, having then lost an attempt to compulsory purchase, now seems set to regenerate the area around Car Giant's site, near the new HS2 Old Oak Common station. Long term, it will bring more prospective customers to the car supermarket's doorstep at least, and meanwhile Car Giant is beginning to increase its focus on electric cars.

Available Car, the main trading brand of Graham Bell Holdings, is a regular on the ID10 podium and thanks to Car Giant's constrained sales it has remained in third place this time with £403m revenues despite Cazoo's arrival.

Since the 2019 promotion of Michael Bell, Graham's son, to the chief executive role, significant investment in technology, facilities and new approaches has been helping the figures rise at Available Car, which has sites at Cannock, Castle Donington, Leeds and Sutton-in-Ashfield.


The Leeds site was the most recent addition, in 2016, in a pattern of expansion every four years or so

since the dealer group's birth in 2002 at Castle Donington.

However, Bell told *AM* last year that he's not desperate to find a fifth site; he'd rather increase the footprint of existing properties, such as with a dedicated preparation factory at Cannock capable of getting ready up to 1,000 cars each week for the forecourt. The family business is about long-term sustainability, not dash and crash.

"We don't need 75 sites across the country. We firmly believe anyone should be able to experience Available Car, but in a sustainable way," says Bell.

By expanding its existing sites Available Car has grown efficiently to increase its sales opportunities in its core area, he says, and it remains controllable – crucial for a business that promises high standards. The internet will help ensure within the next decade or so that any UK customer who wants to buy a vehicle from Available Car can do so.

Big Motoring World has made a lot of noise in recent years and has surged up through the ranks to fourth position as owner Peter 

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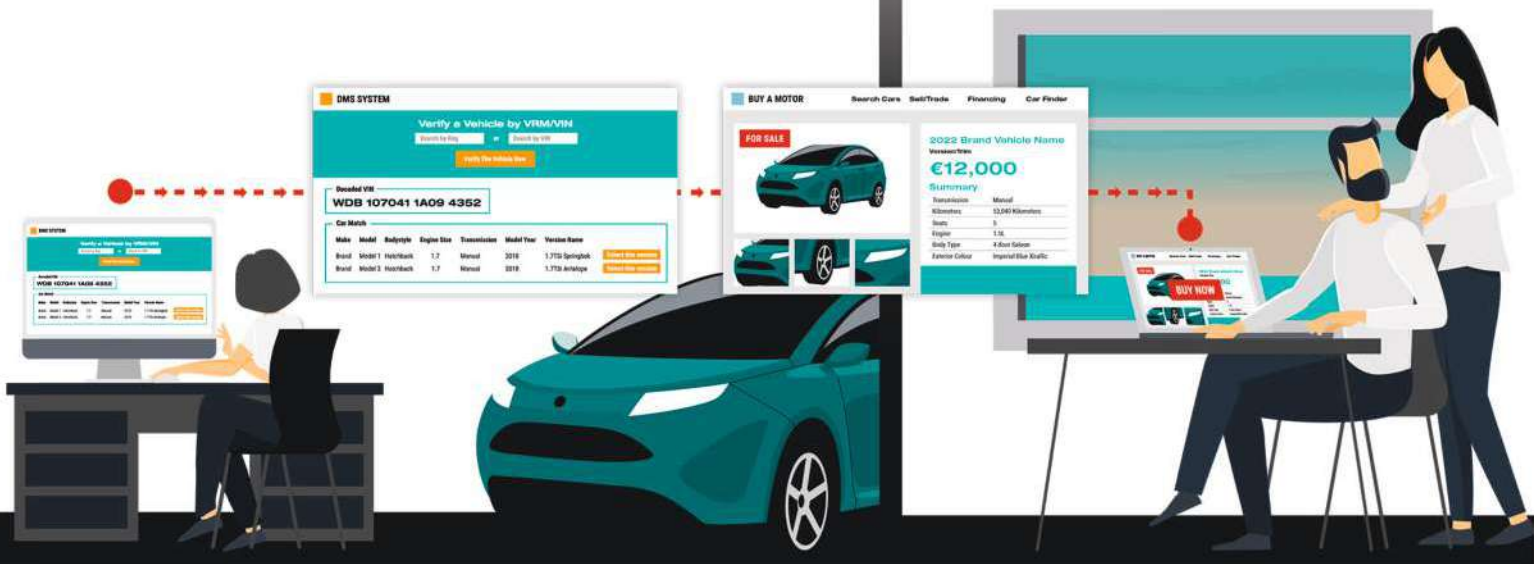
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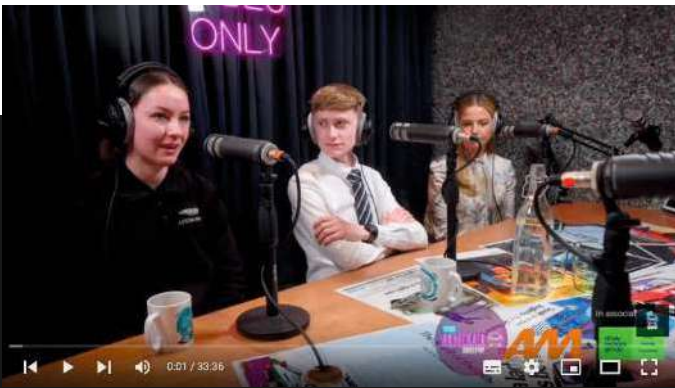
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JCT600 head of colleague experience Nicola Tordoff-Sohne is joined by Aston Martin Leeds apprentice technician Sophie Bailey and Mercedes-Benz Sheffield apprentice service advisor Ben Collinson

“How can we match what we do for customers with what we do for colleagues? We pour lots of investment, resource and time into understanding how to optimise the customer experience. Now we’re doing the same for colleagues.”



Marc Palmer, brand director, Auto Trader and Dylan Setterfield, head of forecast strategy, Cap HPI

“With there being a shortage of stock, a lot of dealers who wouldn’t normally touch electric cars, smaller independents mainly, have dipped their toe in and thought ‘Oh, I did alright with that’. We’ve probably had two or three years’ progress in terms of widespread adoption in dealer networks.”



Steve Young, managing director, ICDP

“We’ve been saying for some time that the property is the ticking time-bomb. At some point there’s going to be a fundamental reshaping of the physical footprint required.”



Umesh Samani, owner, Specialist Cars of Stoke, and co-founder Independent Motor Dealers Association

“Over the years I’ve built this reputation for buying cars privately. I get customers coming back to me not just to buy cars, but to sell me theirs.”



Peter Allibon, sales director, Mazda UK

“We’re a relatively diverse workforce at Mazda UK, with a decent female representation within our senior management team, and our experience is that it is invaluable. We make different decisions as a result of that balance.”



Kat Lord, data projects manager at Sandcliffe Motor Group, and April Wyatt, head of marketing at Waylands Automotive

“You have to be careful not to get caught up in ‘it’s the latest, newest, let’s just do everything’ because it’s not always what the customer wants.”



John O’Hanlon, chief executive of Waylands Automotive

“We can invest, we can take on some of the challenges and we can use some of our accumulated experience.”



Darren Ardron, managing director, Perrys Motor Sales

“Whatever we get thrown at us, we seem to find a way to get through it.”

THE ID10 PBT PER EMPLOYEE £

2022 rank (2021 ID10)	Company/trading name	PBT per employee (£)
9 (NEW)	Redline Specialist Cars	147,059
8 (7)	Saxton 4x4	61,075
5 (2)	Car Giant	51,612
7 (6)	Trade Centre Group	32,628
10 (8)	V12 Sports & Classics	32,212
1 (1)	Motorpoint	24,432
6 (5)	CarSupermarket.com (rebrand from Motor Depot)	14,354
4 (4)	Big Motoring World	12,632
3 (3)	Available Car	4,878
2 (8)	Cazoo	-156,857

THE ID10 ROS %

2022 rank (2021 ID10)	Company/trading name	ROS %
7 (6)	Trade Centre Group	8.5
5 (2)	Car Giant	8.0
8 (7)	Saxton 4x4	4.1
10 (8)	V12 Sports & Classics	2.9
9 (NEW)	Redline Specialist Cars	2.4
6 (5)	CarSupermarket.com (rebrand from Motor Depot)	2.3
4 (4)	Big Motoring World	1.8
1 (1)	Motorpoint	1.3
3 (3)	Available Car	0.8
2 (8)	Cazoo	-82.2

Waddell spread the business out from its Kent heartland. After opening its third car supermarket in 2020, its first outside of Kent, at Enfield, north London, it acquired two-site independent dealer SW Car Supermarket in the autumn of 2021.

The additions, at Peterborough, some 80 miles north of the Enfield branch, were promptly refurbished to coincide with the launch of new branding for Big Motoring World, while SW's chief executive Anton Khan was retained as Big's chief operating officer.

Peterborough was already home to Waddell's £14m national vehicle preparation factory, a 170,000sq ft site equipped with 14 paint ovens, more than 70 maintenance ramps, 15 MOT bays and three photo booths for imagery used in Big Motoring World's online marketing channels.

This year hasn't been all joy for Waddell, however. His separate

venture, Carzam, an online car retailer he launched bullishly with former Cox Automotive executive John Bailey in 2020 to do battle with Cazoo, went into administration in June 2022 owing almost £2.7m, of which almost a fifth was due to AutoTrader.

CarSupermarket.com is the new trading name of Motor Depot since its acquisition by European online car sales business Aramis Group in March 2021. Pushed down by Cazoo's growth from fifth into sixth place in this year's ID10, the Hull-based dealer group reported revenues up by almost £38m year-on-year from its online car sales operation and 12 showrooms spanning the north of England from Preston to Scunthorpe.

Claiming to stock more than 3,000 cars at any time, it now has three dedicated preparation centres to feed that stock into its retail network, which enables it to sell some 20,000 cars annually.

"While bringing on additional new

sites remains a strategic option for the company, the current focus is on driving increased growth from the existing retail sites, combined with developing the online sales channel and increasing the number of home deliveries across the country," states director Phil Wilkinson, its founder, in the annual accounts.

Aramis, which is partly owned by carmaker Stellantis and has businesses in France, Spain and Belgium, said at the time of the acquisition that Carsupermarket.com will benefit from its digital and operational expertise while giving it an immediate marketplace in the UK.

Almost £50m sales growth at Trade Centre Group, which has five used car sites in England plus two in Wales, was overshadowed by its record profitability in 2021.

Sales will climb higher this year since its seventh car supermarket, at Birmingham, didn't begin trading until spring 2022.

Chief executive Tim Carr says the group, which is owned by Swansea-based entrepreneur Mark Bailey, is "looking forward to further expanding our footprint of stores across the UK as we continue to drive our industry leading performance".

In seven years it has grown from a £77m turnover business in Wales into a £258m multinational group.

The final trio in this year's ID10 are all specialists in used premium and luxury cars. While Redline and Saxton 4x4 remain single-site operations delivering organic growth, V12 Sports & Classic has expanded rapidly into new sites, typically occupying redundant franchised dealerships, and increased sales volumes to 3,640 units as a result.

From this year's ID10 it is apparent that major independents see plenty of scope to grow their businesses, even despite the challenges of limited stock availability and strong used car values.



Big Motoring World's five dealerships are supplied by its national vehicle preparation centre



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The latest report shows that fleet prices have risen to record highs while stock levels continue to fall. While new car registrations have risen by 4.6%, the used car market continues to be driven by stock constraints, with ex-fleet supply now at an all-time low, used prices have reached an all-time high.

Part Exchange stock remains scarce for dealers, and even the new car registrations in September are not expected to help this via part exchange trade-ins. However, the outlook remains stable for the rest of 2022 as even with varying consumer demand, the ongoing scarcity of vehicles looks set to keep prices level into the coming year.

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