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The **2024** financial performance of the UK's top 100 dealer groups

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W

elcome to the 2024 AM100 report.

What an exciting period this is for motor retailers. Never in living memory have we had so many new car brands trying to become established in the UK market at the same time as the incumbents are battling to adapt and maintain market share. The impact is clearly seen in the AM100 – MG is a popular franchise to hold, and BYD and Omoda are now popping up in the AM100's franchise mix.

We've had the biggest takeover activity since the era of Pendragon buying Reg Vardy, too. So there is a host of new retailer names in the AM100 this time. Some, like

Lithia UK, appear as a result of acquisitions, and some are regional groups which have fought their way into the AM100 for the first time.

My thanks go to the motor trade specialists at accountancy firm BDO for their collaboration on the AM100 research. Chris Bond, Steve Le Bas and James Evans have been analysing statutory accounts from 2023 and crunching the numbers to monitor the financial output of the AM100. Where 2023 accounts were not available, or consolidation had since occurred, we have provided estimates.

Overleaf you'll see our findings, while the main turn-over table is at the back of the report. There will be a webinar presentation on the AM100, on November 19, which you can register for via AM-online.



Tim Rose
Editor

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We get you. We're with you.



Craig Ford,
Head of Sales, Marketing & Digital Solutions
at mflodirect

As the UK's largest source of used cars, mflodirect is proud to sponsor the AM100 this year – congratulations to everyone listed.

We know that we only thrive when the whole industry thrives. For our part, this is why we've built our platform around the idea that every dealer can buy exactly the stock they need, in the way they want. We want to make sure that our dealers can make strategic buying moves that suit their businesses and customers.

So, we relaunched our platform earlier this year, unveiling not only our new stock offering, Inspected Vehicles, but also a new buying function – Auctions.

Our dealers all have different buying mindsets. Some want to get in, buy at a set price and have the peace of mind that our Assured Standard provides. Others want to take the time to get into the details and secure their perfect vehicle by outbidding their competition. We make sure they

can buy how they want on one speedy platform.

As the industry evolves, we want to make sure that our dealers are equipped with all the insights they need to confidently source used EVs for their customers. We have the largest EV fleet in the UK, which gives us a wealth of data and actionable insights we can share with our dealers to help them with their strategic buying decisions.

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Navigating the New Normal: Efficiency and Growth Amid Challenges



John Hogan, Co-Founder & CEO at
RWA Automotive

Congratulations to everyone for reaching a place on the AM100. This achievement is the result of many years of hard work and dedication from their leaders and teams across the entire network.

In 2024, businesses have experienced a shift back toward a more standard trading environment after four years marked by extraordinary dynamics and performance.

However, this new normal appears very different for many companies on the AM100 list. Over the past four years, the complexity of your operations has increased significantly in terms of people, processes and systems.

Amid ongoing challenges such as living costs and interest rates, there remains a persistent need to drive efficiency and improve gross margins.

RWA Automotive is the leading business intelligence provider in the industry, assisting our customers in confidently tackling these challenges.

We offer daily actionable insights to everyone at each level of the organisation, driving performance continuously.

Our commitment to continuous innovation leads us to proudly announce the upcoming launch of an advanced benchmarking service.

This new offering will enable our customers to compare their performance against peers at all operational levels, helping them identify and action significant profit opportunities within the month.

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AUTOMOTIVE

AI and Humans: A Seamless Partnership in Automotive CX



Phil Williams, Chief Executive Officer,
Direct Affinity

As AI continues to revolutionise customer experience (CX), the key question remains: Will it replace our human teams?

For automotive businesses, the answer lies in balance. At Direct Affinity CX (DACX), we believe the future of CX is a collaboration between AI tools and human expertise. While AI efficiently handles routine tasks – such as answering basic queries or analysing customer data – humans provide the emotional intelligence that is crucial in more complex interactions.

AI's ability to track behaviour, personalise communication and automate workflows helps streamline customer journeys.

This frees our human resources to focus on what they do best ... building rapport and addressing intricate issues. Together with AI, we create a seamless customer experience that identifies next-best actions, boosts satisfaction, lowers

operational costs and drives sales. However, with two-thirds of customers still valuing human contact, particularly in the automotive industry, it's essential to keep people at the heart of CX strategies.

At DACX, we leverage AI to assist – not replace – our expert agents, ensuring a more efficient and personalised service while keeping customers' preferences front and centre. The future isn't AI vs. humans – it's AI *and* humans, working in harmony.



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visit www.gardxgroup.com

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 brands, GardX Protect (vehicle protection and non-regulated products), GardX Assure (insurance and regulated products) and GardX Engage (digital solutions).

2023 is a special year for GardX as it is turning 20 years old. To mark this anniversary, GardX is set to unleash an ambitious suite of new innovations, products and launches, designed to positively disrupt the market.

Announced under a framework of "Transformation @ Twenty", these reflect the culmination of two years' development and are considered to be the most significant co-ordinated launches in the history of the company.

Billy Coutin, CEO, says: "A spirit of restless innovation and pushing boundaries has been the lifeblood of GardX for 20 years. So, it just wouldn't feel right to mark our 20th anniversary by looking back with nostalgia. Instead, we want to look forward with ambition, and with a renewed commitment to our industry, our partner dealers and OEMs.

"We understand some of the very real challenges our clients are facing. These challenges are multi-dimensional and complex in nature. However, we have innovative and tangible solutions, including new products and new channels in both the regulated and non-regulated arenas that can play a vital role in our clients overcoming these hurdles."



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Providing an experience that exceeds expectations is a simple way to get any sale off to the right start, and with 62% of customers expecting a complimentary beverage when they enter a showroom, quality refreshments should form part of your customer engagement strategy.

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**Damian Tyler, Assurant European
Business Development & Commercial
Director.**

Assurant once again is proud to sponsor the AM100 and we'd like to congratulate all those listed for 2024.

We've been helping consumers in the UK and across Europe to protect their vehicles for 50 years, protecting more than 54 million vehicles worldwide. We continue to place significant pride in our market-leading products including Warranty, Cosmetic Protection, Service plans and more.

Our focus has continued throughout 2024 on delivering an exception digital experience for our partners and their customers, with significant investment in technology such as Assurant Vehicle Care, an online portal and app.

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Ray Chapman Motors is one of the new entrants in the AM100 listing

TURNOVER CHANGE BY PERCENTAGE AND VALUE

Rank 2024	Group	Turnover growth (%)
6	Group 1 Automotive	85.7%
2	Lithia	71.5%
38	Yeomans	65.7%
39	Porsche Retail Group	61.9%
99	FRF South Wales	61.4%
47	City West Country **	50.3%
91	Ray Chapman Motors	39.6%
28	Allen Ford (Supergroup UK)	36.7%
75	Ancaster Group	35.3%
9	Greenhous Group	33.6%
92	Drift Bridge Group	30.0%
56	Toomeys	27.4%
78	Parkway Derby	23.5%
25	Perrys Group	23.5%
97	Worcester Carsales	23.4%
46	Richmond Cars	23.1%
57	Brindley Garages Group	22.4%
80	Heritage Automotive	21.8%
65	Vantage Motor Group	21.5%
59	DM Keith	21.3%
74	Fish Brothers	21.1%
72	Riverside Motors Group	20.1%
23	Steven Eagell	19.6%
84	Waylands Automotive	19.3%

Rank 2024	Group	Turnover growth (£,000)
2	Lithia	2,588,564
6	Group 1 Automotive	1,923,184
1	Sytner *	1,102,250
4	Vertu Motors	705,043
7	Marshall Motor Group	532,369
9	Greenhous Group	375,690
5	Global Auto Holdings (aka Lookers)	297,500
38	Yeomans	209,494
39	Porsche Retail Group	198,285
28	Allen Ford (Supergroup UK)	194,813
11	Stoneacre Motor Group	179,600
8	TrustFord	158,777
13	Motus UK (incl. Pentagon Group)	155,646
25	Perrys Group	151,135
16	Park's Motor Group	146,513
23	Steven Eagell	137,954
19	Johnsons Cars	126,813
47	City West Country **	123,180
21	Lloyd Motors	122,733
18	Swansway Garages	121,631
15	John Clark Motor Group	115,588
26	RRG Group and Norton Way	101,989
33	Snows Motor Group **	93,169
27	TG Holdcroft	90,350

* Estimated ** Prior year amounts used as current period not available

Remarkable turnover growth cannot mask the impact of cost pressures on UK's largest franchised dealer groups. BDO's motor retail experts *James Evans*, *Steve Le Bas* and *Chris Bond* report

After the exceptional COVID period we noted in last year's AM100 report that the motor retail industry had started on the path to 'normality'. This has been borne out in the 2023 accounts they have filed.

While the AM100 performance remained strong when compared with pre-COVID levels, it is clear that groups are needing to work harder to earn their keep, with a combination of high interest rates, inflationary pressures and improved vehicle supply impacting margins and profitability.

Combined turnover has breached the £80 billion mark for the first time, as across the AM100 cohort there was an increase of 19% in



PROFIT BEFORE TAX (PBT) – TOP PERFORMERS

Rank 2024	Group	PBT (£,000)	Rank 2023	Group	PBT (£,000)	Rank 2022	Group	PBT (£,000)
1	Sytner	135,990	1	Sytner	178,993	2	Arnold Clark Automobiles	263,000
3	Arnold Clark Automobiles	116,000	2	Arnold Clark Automobiles	173,500	1	Sytner	178,128
6	Group 1 Automotive	64,677	3	Lookers	84,400	3	Lookers	90,000
2	Lithia	55,199	6	Marshall Motor Group	70,000	4	Vertu Motors	78,770
7	Marshall Motor Group	42,918	7	Group 1 Automotive	61,353	5	Pendragon	78,600
16	Park's Motor Group	41,891	5	Pendragon	57,200	6	Marshall Motor Holdings	65,000
12	Listers	40,501	20	Park's Motor Group	43,112	10	JCT600	45,046
10	JCT600	36,029	10	JCT600	43,064	28	Helston Garages Group	30,426
4	Vertu Motors	34,567	12	Listers	39,375	8	TrustFord	29,352
60	CEM Day	30,326	14	Stoneacre Motor Group	37,337	9	Jardine Motors Group	28,859
23	Steven Eagell	29,199	60	CEM Day	32,790	23	Park's Motor Group	26,338
9	Greenhous Group	26,321	4	Vertu Motors	32,450	24	Steven Eagell	25,811
11	Stoneacre Motor Group	24,848	24	Dick Lovett Group	31,567	17	Swansway Garages	25,169
24	Dick Lovett Group	24,353	9	Jardine Motors Group	31,028	26	Lloyd Motors	24,709
15	John Clark Motor Group	22,856	8	TrustFord	26,372	25	Dick Lovett Group	24,417
21	Lloyd Motors	22,453	25	Lloyd Motors	26,210	15	John Clark Motor Group	24,057
39	Porsche Retail Group	22,034	33	Cambria Automobiles	26,184	55	CEM Day	23,724
31	Cambria Automobiles	20,790	26	Steven Eagell	25,811	20	Greenhous Group	23,063
20	Hedin Automotive UK	17,000	19	John Clark Motor Group	25,313	31	Cambria Automobiles	21,752
13	Motus UK (incl. Pentagon Group)	15,810	21	Swansway Garages	22,346	14	Listers	20,628

RETURN ON SALES (ROS) – TOP PERFORMERS

Rank 2024	Group	ROS (%)	Rank 2023	Group	ROS (%)	Rank 2022	Group	ROS (%)
60	CEM Day	10.6%	60	CEM Day	12.7%	55	CEM Day	9.0%
39	Porsche Retail Group	4.3%	49	Porsche Retail Group	5.1%	99	Cars2	5.8%
16	Park's Motor Group	4.1%	20	Park's Motor Group	5.0%	2	Arnold Clark Automobiles	5.5%
45	Hatfields	3.6%	33	Cambria Automobiles	4.6%	47	Porsche Retail Group	5.1%
23	Steven Eagell	3.5%	95	Cars2	4.5%	28	Helston Garages Group	4.9%
31	Cambria Automobiles	3.4%	84	Gates Group	4.5%	45	Hatfields	4.8%
98	HSF Group	3.3%	86	John Grose Group	4.4%	88	Parkway Derby	4.6%
85	John Grose Group	3.2%	55	Bowker Motor Group	4.3%	75	Gates Group	4.5%
12	Listers	3.1%	24	Dick Lovett Group	4.1%	89	John Grose Group	3.9%
48	TC Harrison Group	3.0%	48	Hatfields	4.1%	31	Cambria Automobiles	3.9%
24	Dick Lovett Group	3.0%	40	Halliwell Jones Group	4.0%	26	Lloyd Motors	3.8%
99	FRF South Wales	2.9%	26	Steven Eagell	3.7%	91	Howards Group	3.8%
21	Lloyd Motors	2.6%	79	Cotswold Motor Group	3.7%	42	Halliwell Jones Group	3.8%
70	JCB Group	2.6%	72	Toomeys	3.6%	59	Bowker Motor Group	3.8%
10	JCT600	2.5%	2	Arnold Clark Automobiles	3.5%	23	Park's Motor Group	3.7%
37	Williams Motor Company	2.5%	25	Lloyd Motors	3.5%	25	Dick Lovett Group	3.7%
58	Bowker Motor Group	2.4%	12	Listers	3.2%	24	Steven Eagell	3.7%
72	Riverside Motors Group	2.4%	14	Stoneacre Motor Group	3.2%	78	Riverside Motors Group	3.7%
55	Peoples	2.4%	42	Marsh Wall	3.1%	61	Yeomans	3.5%
3	Arnold Clark Automobiles	2.3%	87	Parkway Derby	3.1%	10	JCT600	3.4%



The Inchcape name does not feature in the AM100 for the first time in decades



Revenue, higher than the 9% in the previous year. Much of this can be seen through three key lenses, being the impact of inflation on sales values, the improved vehicle supply, and market consolidation.

Per Society of Motor Manufacturers and Traders (SMMT) data, new vehicle registrations increased by 18% in 2023, driven by the fleet sector, which, in turn, meant more vehicles returned into the used car market where supply has generally outweighed demand.

The greatest increases, though, were for those groups who led the way with market consolidation. The largest growth was for Lithia and Group 1 Automotive who grew their sales by 72% and 86% respectively as Lithia acquired Pendragon's motor division at the start of 2024 and Group 1 Automotive made a number of acquisitions, with Inchcape Retail being its most substantial. Had the two divested businesses been included in the prior year

amounts then this would have reduced the overall AM100 turnover increase from 19% to 12%, such was its impact.

The takeovers mean that this is the first AM100 in decades to not include the Pendragon or Inchcape names.

Yeomans achieved growth of 66% as its acquisitions in 2022, including 11 dealerships from Helston Garages, had a full year of impact.

Outside of acquisition activity, City West Country increased its revenue by 50% (based on 2022 data before the impact of agency), carefully navigating market conditions at the time.

Turnover growth in monetary terms continued to be dominated by the largest groups, with Lithia and Group 1 Automotive leading the way. Sytner also increased its revenue base by £1.1m, bringing its total revenues to an estimated £7.9bn primarily as a result of its acquisition of the majority of Rybrook, and looks set to surpass £8bn of sales in 2024.

Lithia is hot on its heels with sales of £6.2bn, pushing Arnold Clark into third.

The two significant acquisitions did give further opportunity for new entrants into the AM100, provided they had been in growth. The threshold to make it into the AM100 this year was £148m, £13m higher than last year.


With Pendragon and Inchcape having divested, Ocean Automotive, RJTK Investments and Read Motor Group dropped out of the cohort due to size. These three groups were new entrants last year, however it is very competitive down the tail end of the AM100 and there are a number of groups of a similar size who have been knocking on the door.

The new entrants are Ray Chapman Motors, Worcester Carsales, HSF Group, FRF South Wales and WR Davies. The highest of these, Ray Chapman Motors, acquired two new sites in the year to increase revenue by 40% and catapult itself up to No 91.

Despite the 19% increase in turnover for the AM100 cohort, there was a 26% fall in the level of profit before tax, leading to a fall in net margin from 2.3% to 1.4%.

That is still ahead of pre-pandemic levels, but it reflects a significant fall from the 2.6% in 2021. The improved new vehicle supply continued to impact used car values as dealers have had to contend with consumers, faced with increasing cost-of-living pressures, keener than ever to get good value for their purchase and making the most of greater competition in the market.

While this eroded gross margins there were other cost pressures on dealers with high inflation impacting their cost base as well as stock financing charges increasing.

CEM Day has remained top of the profitability rankings, continuing to use its hire division to good effect and delivering a 10.6% return, 



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

Rank 2024	Group	PBIT (£)	Rank 2023	Group	PBIT (£)	Rank 2022	Group	PBIT (£)
60	CEM Day	74,054	60	CEM Day	69,717	47	Porsche Retail Group	58,528
39	Porsche Retail Group	60,929	49	Porsche Retail Group	58,528	55	CEM Day	52,423
31	Cambria Automobiles	40,834	33	Cambria Automobiles	46,796	99	Cars2	43,733
45	Hatfields	36,472	95	Cars2	39,495	45	Hatfields	41,474
77	Partridge of Hampshire	36,323	37	HR Owen	38,430	78	Riverside Motors Group	40,807
56	Toomeys	35,521	48	Hatfields	36,230	40	HR Owen	38,440
98	HSF Group	33,857	24	Dick Lovett Group	35,562	31	Cambria Automobiles	34,802
48	TC Harrison Group	30,399	72	Toomeys	34,403	52	TC Harrison Group	33,895
72	Riverside Motors Group	27,183	40	Halliwell Jones Group	31,586	42	Halliwell Jones Group	30,324
70	JCB Group	26,626	79	Cotswold Motor Group	27,861	28	Helston Garages Group	29,757
24	Dick Lovett Group	26,421	42	Marsh Wall	27,326	74	Toomeys	29,106
23	Steven Eagell	25,536	86	John Grose Group	26,887	25	Dick Lovett Group	28,736
34	HR Owen	23,530	81	Riverside Motors Group	26,453	88	Parkway Derby	27,578
89	Cars2	22,384	84	Gates Group	26,094	75	Gates Group	25,921
12	Listers	21,740	47	TC Harrison Group	25,726	17	Swansway Garages	25,815
16	Park's Motor Group	21,387	25	Lloyd Motors	25,250	2	Arnold Clark Automobiles	25,651
21	Lloyd Motors	21,232	26	Steven Eagell	24,913	26	Lloyd Motors	25,527
37	Williams Motor Company	21,032	21	Swansway Garages	23,869	24	Steven Eagell	24,913
15	John Clark Motor Group	20,448	20	Park's Motor Group	23,409	20	Greenhouse Group	23,799
85	John Grose Group	20,324	57	Peoples	23,382	91	Howards Group	23,117

PROFIT PER FRANCHISED OUTLET – TOP PERFORMERS

Rank 2024	Group	(£s)	Rank 2023	Group	(£s)	Rank 2022	Group	(£s)
39	Porsche Retail Group	4,406,800	60	CEM Day	3,279,000	47	Porsche Retail Group	3,269,600
60	CEM Day	4,332,286	49	Porsche Retail Group	3,269,600	20	Greenhouse Group	2,306,300
9	Greenhouse Group	2,632,100	55	Bowker Motor Group	2,020,167	55	CEM Day	2,156,727
77	Partridge of Hampshire	2,345,500	24	Dick Lovett Group	1,856,882	32	Peter Vardy	1,840,000
45	Hatfields	1,942,571	48	Hatfields	1,658,250	45	Hatfields	1,821,667
24	Dick Lovett Group	1,432,529	40	Halliwell Jones Group	1,650,273	49	Marsh Wall	1,697,400
58	Bowker Motor Group	1,214,667	79	Cotswold Motor Group	1,571,672	59	Bowker Motor Group	1,554,167
37	Williams Motor Company	1,040,923	80	Partridge of Hampshire	1,425,899	25	Dick Lovett Group	1,436,294
20	Hedin Automotive UK	1,000,000	42	Marsh Wall	1,337,199	42	Halliwell Jones Group	1,397,400
99	FRF South Wales	905,200	1	Sytner	1,278,521	2	Arnold Clark Automobiles	1,376,963
76	Cotswold Motor Group	894,400	36	Williams Motor Company	1,232,000	1	Sytner	1,370,215
98	HSF Group	873,000	44	Greenhouse Group	1,121,429	81	Partridge of Hampshire	1,242,500
32	Peter Vardy	872,571	21	Swansway Garages	1,064,095	88	Parkway Derby	1,216,000
1	Sytner	871,731	86	John Grose Group	1,041,750	17	Swansway Garages	1,198,524
21	Lloyd Motors	863,577	18	Hedin Automotive UK	1,000,000	78	Riverside Motors Group	1,168,000
44	Halliwell Jones Group	780,917	84	Gates Group	981,177	35	Williams Motor Company	1,163,077
12	Listers	778,865	25	Lloyd Motors	970,741	82	Cotswold Motor Group	1,096,800
43	Marsh Wall	764,444	87	Parkway Derby	962,947	26	Lloyd Motors	1,029,542
72	Riverside Motors Group	753,500	10	JCT600	956,978	75	Gates Group	975,778
31	Cambria Automobiles	742,500	2	Arnold Clark Automobiles	937,838	10	JCT600	938,458



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down from the record 12.7% posted the previous year.

In fact, only seven of the AM100 improved their profitability on the prior period, which was exceptional in a year with more challenging conditions. Just more than a third of the AM100 improved between 2021 and 2022, putting this into perspective.

Some groups did continue to post results with returns of 4%-plus with Porsche Retail Group and Park's Motor Group also achieving what 11 groups managed in 2022. Hatfields followed closely behind with a profit margin of 3.6%.

Elsewhere in the performance tables Porsche Retail Group reclaimed its top spot in profitability per outlet.

However CEM Day remained top for operating profit per employee, with the two groups battling in those two tables for the third year running. Where profit before tax is considered in its own right, 13 groups made profits of less than £1m, twice as many as in 2022 (six).

Looking at the workforce, the return of higher levels of new and used vehicle supplies appears to have led AM100 dealer groups to recruit. Overall, the AM100 employed almost 125,000 people, up from 120,000 in 2022 and back in line with 2020 levels.

If 2023 was a return to more challenging times then we are seeing 2024 as being just as challenging, with motor retailers facing pressures from all

directions. The latest July SMMT forecast anticipates a 3.4% increase in new vehicle registrations in 2024 with a further 3.1% rise in 2025, much lower than 2023. This fall has helped to somewhat settle the used vehicle market which has seen less volatility in valuations. However, consumer demand has remained sluggish with interest rates remaining high, and retailers are being careful not to overstock.

Where dealers need to keep working harder to attract customers then this will continue to soften margins.

Mercedes-Benz and Volvo continue to forge a path with the agency model and in the next 12 months BMW will dip its toe in the water with Mini, though other significant brands have continued

to delay any implementation. The jury is still out on agency, with dealers holding varying opinions.

Uncontrollable areas such as the macroeconomic environment continue to present cost pressures despite the easing of inflation, and the industry awaits more certainty and a clearer plan from the Government in incentivising greater electric vehicle adoption.

In the recent Budget it was announced that national insurance and the national minimum wage would both increase, further fuelling a higher cost base. Interest rates remain high although there are signs these are beginning to fall.

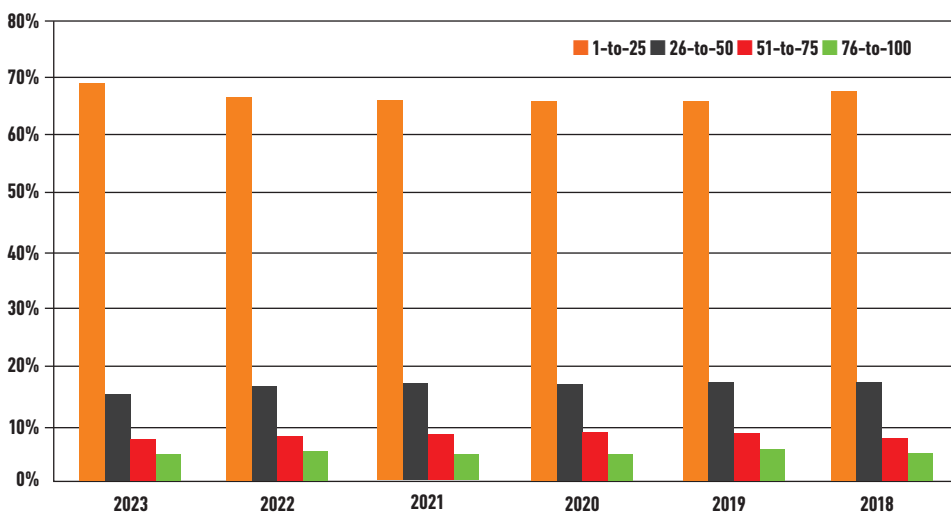
No longer in the background is the impact of rulings on finance commissions. The recent Court of Appeals ruling has plunged the sector into shock and it has led to some finance houses withdrawing from the market and other stopping commissions altogether. Dealers remain at the sharp end of these issues as the uncertainty on Financial Conduct Authority (FCA) requirements makes helping customers and doing business even more challenging.

Despite all of these challenges and continuing uncertainty there remain some constants. Appetite for consolidation will remain and the industry in the UK clearly remains an attractive proposition for foreign groups, with Inchcape Retail, Lookers and Pendragon all being acquired in the past year by ambitious American and Canadian motor retailers. Who's next?

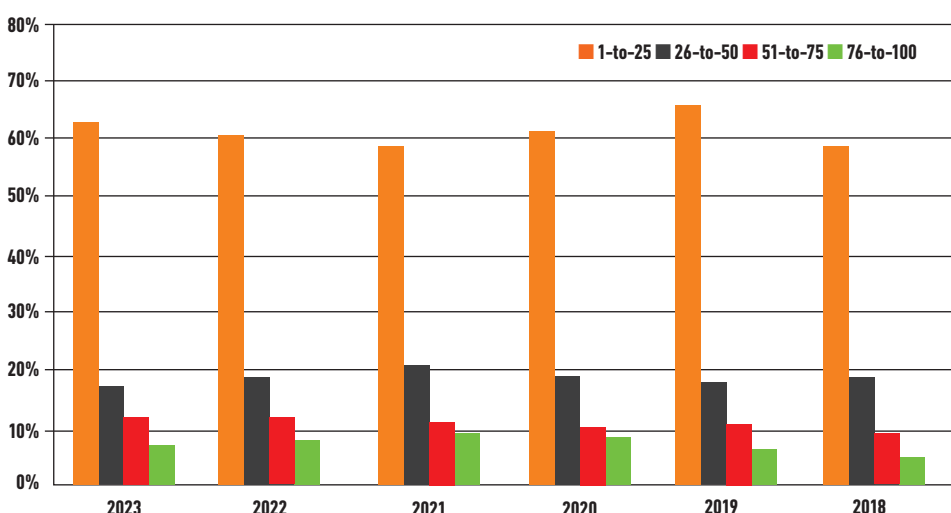
Motor retailers will remain resilient in the face of demand changes, regulatory challenges, and continuing pressures on their cost bases, all of which will erode margins and increase the cost of doing business.

We expect the 2024 results to show lower profitability and small increases in turnover, but opportunities will remain for the AM100 to perform strongly.

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.

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CHALLENGES AND OPPORTUNITIES AS INDEPENDENTS FEEL THE PINCH

Franchised dealers apply the pressure as four of top independents declare losses. *Tim Rose* reports

It has been quite a traumatic time for the ID10, our annual observation of the 10 largest independent used car dealers in the UK.

The UK's used car market experienced significant shifts in 2023, driven by economic uncertainties, used car availability issues still playing out after a depressed new car market in 2020 and 2021, and changing consumer behaviour. While the demand for affordable vehicles persisted amid inflationary pressures, the market faced both challenges and opportunities.

Independent dealers have also faced tough competition from the franchised dealer sector, as the likes of Arnold Clark Automobiles and Marubeni continue to develop their own used car supermarkets.

Still, the rapid depreciation of Q4 2023 was felt by independents and franchised dealers alike. During the pandemic, used car values had soared due to demand exceeding the low supply, and when the wholesale market correction came in Q4 2023 it was seen as a sign of a return to a normal, depreciating, car market.

The tougher conditions are indicated in the ID10 data this year. Last time there were three major independent dealers which reported pre-tax losses – this time there are four, three of which fell deeply into the red, losing almost £45 million between them. And that's without Cazoo (see panel P17), which collapsed in May not five years since it sold its first car, and never recording a pre-tax profit.

The combined turnover of the ID10 is £4.14 billion, well below the near £5 billion we reported last year




thanks largely to Cazoo's absence. That's not the full story, however, as four of this year's ID10 groups – Motorpoint, CarSupermarket.com, Trade Centre Group and Redline Specialist Cars – have reported a decline in year-on-year revenues. A fifth, Saxton 4x4, grew, but barely in line with inflation.

Motorpoint has long been the UK's largest used car dealer group, and remains so, despite a painful 2023 in which its turnover slumped by a quarter. Chief executive Mark Carpenter described it as "the most difficult in our history", citing rising borrowing costs, subdued consumer demand, lower stock in the market and depreciation.

Its pre-tax losses grew to £10.4 million from a £300,000 loss the prior year, leading to about 250

redundancies and a pause on its dealership expansion plan after it opened its 20th showroom at Ipswich in May 2023.

It has since restarted its plan, and it will open its 21st dealership in December 2024 in Norwich. Some of Motorpoint's recent openings have been at smaller properties than its traditional car supermarkets which stock hundreds of cars. This is in recognition of its ability to present group-wide stock to potential buyers who can reserve a car online and have it brought to their nearest dealership.

In prioritising protecting profit and cashflow, it improved data analysis to boost margins, introduced a customer fee of £149 for the administration of processing and handover of the car, 

THE ID10

2024 Rank (2023 ID10)	Company/trading name	Turnover 2023 £,000	Turnover 2022 £,000	Profit before tax 2023 £	Profit before tax 2022 £	No. of staff 2023	No. of staff 2022	Key executive	No. of sites 2023	No. of sites 2022
1 (1)	Motorpoint	1,086,600	1,440,200	-10,400,000	-300,000	764	899	Mark Carpenter, chief executive	20	18
2 (3)	Big Motoring World	697,438	529,689	2,247,687	10,953,122	881	613	Laurence Vaughan, chief executive	8	5
3 (4)	Available Car	425,977	405,837	-12,664,000	-7,439,000	610	672	Michael Bell, chief executive	2	4
4 (5)	Car Giant	491,231	397,946	-22,385,297	42,323,817	511	511	Michael Holahan, managing director, car operations	1	1
5 (6)	CarSupermarket.com	339,957	366,693	2,387,726	-1,361,907	489	491	Matthew Barrick, chief executive	10	11
6 (7)	Trade Centre Group	311,565	345,946	7,638,000	8,074,000	665	760	Tim Carr, chief executive	6	7
7 (8)	Saxton 4x4	250,438	243,634	5,181,355	9,763,738	164	145	Danny Austin, managing director	1	1
8 (10)	V12 Sports & Classics	195,510	166,016	563,997	183,123	215	158	Farhad Tailor, managing director	4	8
9 (NEW)	Tom Hartley Jnr	181,005	114,975	20,162,861	11,317,467	14	11	Tom Hartley jnr, managing director	1	1
10 (9)	Redline Specialist Cars	158,436	182,159	-326,341	2,485,179	32	33	Rob Milner, managing director	1	1

and increased the fees charged by its Auctions4Cars A4C trade-to-trade remarketing business.

Motorpoint has traditionally focused on retailing nearly-new and young-used cars which are still in short supply, forcing it to widen its selling criteria to include vehicles up to five years old and 50,000 miles. It said the move would help customers 'find the right vehicle in accordance with more constrained household budgets', and was selling such cars for an average £14,750 versus its £19,750 average of spring 2023.

Despite the past ambitions of Cazoo, Motorpoint looks set to remain the ID10's biggest group by some margin, even as Big Motoring World's expansion plan continues.

Big Motoring World also reported a dramatic drop in pre-tax profits, but it has remained in the black and it increased revenues by almost £170m. Equally dramatic was the boardroom battle, following an equity purchase by venture capitalists Freshstream, which eventually ousted its founder and majority shareholder Peter Waddell. Waddell lost a subsequent High Court legal battle, and Big Motoring World's executive chairman and former Sytner boss Laurence Vaughan, who joined after Freshstream's investment in 2022, now holds the CEO post.

Vaughan has reiterated the company's aim to grow its network to become the clear market leader in the car supermarket sector, which would require it to overtake Motorpoint, which currently is the only used car supermarket group that has national coverage.

In 2023 Big Motoring World Wimbledon opened, then the company acquired two of Available Car dealerships at Leeds and Cannock shortly before the year closed, taking it up to eight dealerships.

That has increased further in 2024. In July it bought three CarShop sites from Sytner at Sheffield, Norwich and Camberley. Vaughan claims group turnover will have exceeded £1bn annually as a result. It has since closed one of its two dealerships in Peterborough, however, citing a need to



create operational efficiencies and moving all staff to the remaining site which has increased its stockholding to 600 cars.

Vaughan says: "The Big Motoring World model is built on providing outstanding value to customers backed up by excellent customer service. I am confident that we can continue to grow our brand to be the outstanding business in our sector."

Big Motoring World is forecasting to sell 60,000 used cars this year.

As mentioned, Available Car sold off two of its four dealerships as its owner Graham Bell contracts the business to restore profitability after two tough years for the group as losses mounted, reaching £12.6m in 2023. The funds raised from the sale of the loss-making Leeds and Cannock dealerships have been used to pay down debts to a sustainable level – its accounts show stock funding costs rocketed from £2m to £5.2m in 2023.

Meanwhile, Bell's long-established business at the home of Fords of Winsford has also been wound down and he has resigned from the Fords of Winsford board, which is led by managing director Paul Ford.

"We have made operational changes to ensure the

long-term future of the organisation is secure," Bell states in its accounts. He says interest rates have been "extremely impactful" given the level of borrowing the business requires to operate and fund stock. The downsizing has meant the group's vehicle and parts stock dropped from £87.8m in 2022 to £48.6m in 2023.

Having invested in IT, staff training and sales processes in recent years Available Car will now focus on its two remaining locations at Castle Donington and Sutton In Ashfield.

Fourth placed ID10 group Car Giant actually had a good 2023, despite what its headline profitability suggests. Its pre-tax profits were hammered by a property revaluation which dropped £50.6m, leading to the £22m loss reported.

Last decade London-based Car Giant looked set to benefit from housing development opportunities near the HS2 terminus provided it could relocate, but owner Geoff Warren's own development project was rejected and eventually a planning inquiry threw out another which threatened Car Giant with a compulsory purchase order.

Operating profit improved, however, to £31.3m from £25m the previous year and

TURNOVER CHANGE YEAR ON YEAR

2024 rank	Company/trading name	Growth/decline
9 (NEW)	Tom Hartley Jnr	36%
2 (3)	Big Motoring World	24%
3 (5)	Car Giant	19%
8 (10)	V12 Sports & Classics	15%
4 (4)	Available Car	5%
7 (8)	Saxton 4x4	3%
5 (6)	CarSupermarket.com	-8%
6 (7)	Trade Centre Group	-11%
10 (9)	Redline Specialist Cars	-15%
1 (1)	Motorpoint	-33%

Profits dropped at Big Motoring World but it hasn't stopped expanding





DEALER BRANDS COME OF AGE

With increased digitisation and industry consolidation, the strength of regional franchised dealer brands promises to offer a real competitive advantage in used car retailing. A strong regional or national dealer brand can have a positive effect on customer sentiment, loyalty, and sales performance.

We'll examine the importance of building a robust dealer brand, leveraging customer feedback, and employing best practices for managing your reputation.

The Significance of Regional Dealer Brands

Regional dealer brands hold a unique position of trust and familiarity within their communities. While some groups are strong in multiple regions, they often enjoy a perception of a closer, more local, or "family" relationship with their customers. This allows regional dealers to tailor their marketing to local customer segmentation.

Customer Sentiment: The Heartbeat of Your Business

Understanding customer sentiment is a crucial indicator of your dealership's health. Positive sentiment drives word-of-mouth referrals, repeat business, and a strong reputation in the community. Conversely, negative sentiment can quickly erode trust and deter potential buyers.

Lessons from Cazoo's Experience

Cazoo's demise underscores the importance of local engagement and trust. Despite their heavyweight marketing investment, Cazoo failed to deliver the level of trust that regional dealers cultivate.



Most customers want to visit their dealer, interact with real people, test drive cars of interest, and feel assured of support close to home. Arnold Clark and Bristol Street Motors continue to build on a strong existing business, not a house of cards.



Tips for Enhancing Your Reputation

Gather and Leverage Customer Feedback

Solicit Reviews: Encourage customers to leave feedback and reviews. Make it easy for them by asking every time. Customers appreciate their opinions being valued, and positive reviews serve as powerful endorsements.

Use Feedback Constructively: Analyse the feedback to identify areas for improvement. This insight is invaluable for making informed decisions that enhance customer satisfaction.

Respond to Reviews

Engage with Customers: Responding to reviews, both positive and negative, shows that you value feedback and are committed to providing excellent service. Thank customers for positive reviews, and address any concerns raised in negative ones with empathy and a willingness to resolve the issue. Showcase

Responsiveness: Publicly addressing reviews demonstrates transparency and responsiveness, which can enhance your reputation and build trust with potential customers.

Benchmark Your Performance

Compare and Contrast: Benchmark

your dealership's performance against regional and national competitors.

Understanding where you stand can highlight your strengths and reveal opportunities for growth.

Set Goals: Use your benchmarking data to set realistic and achievable goals for improvement. Whether it's reducing response time to inquiries or increasing the number of five-star reviews, having clear objectives will help guide your efforts.

Building a Trusted Regional Brand

A strong regional dealer brand is built on trust, customer satisfaction, and community engagement. Layer on feedback, benchmarking, and thoughtfully responding to reviews and you can cultivate a powerful reputation.

At JudgeService, we are dedicated to helping dealerships harness the power of customer feedback to build stronger brands and deliver exceptional service. Remember, buying a car should be an enjoyable experience and your reputation reflects making that happen.

For more insight and to use customer feedback to enhance your dealership's reputation, visit www.judgeservice.com or contact us directly at 01423 225166.

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revenues rocketed by almost £100m as the business sold 22% more used cars.

While investing in improved digital capabilities and staff development, the next phase for Car Giant will be to modernise and expand its facilities, also bringing in some of the currently unused land into play.

"The 45-acre Car Giant site has been designated in the new local plan as strategic industrial land with

emphasis on expansion due to its proximity to the new HS2 interchange at Old Oak Common," says managing director Michael Holahan.

"The designation will, however, allow our long-awaited expansion to take place." In 2019 Warren, who founded Car Giant in 1976 and is reported to have become one of London's largest landowners, said he wanted the company to create a large,

dedicated electric car retail centre that would help Londoners to make the switch to zero-emission vehicles.

2023 was a year of recovery for CarSupermarket.com, the trading name of Motor Depot, as it turned around its 2022 £1.4m pre-tax loss into £2.4m profit, despite retail sales volume dropping 2.5%. Its directors and senior managers were given a

THE ID10 PROFIT BEFORE TAX (PBT) PER EMPLOYEE £

2024 rank (2023 ID10)	Company/trading name	PBT per employee (£)
9 (NEW)	Tom Hartley Jnr	1,440,204
7 (8)	Saxton 4x4	31,594
6 (7)	Trade Centre Group	11,486
5 (6)	CarSupermarket.com	4,883
8 (10)	V12 Sports & Classics	2,623
2 (3)	Big Motoring World	2,551
10 (9)	Redline Specialist Cars	-10,198
1 (1)	Motorpoint	-13,613
4 (4)	Available Car	-20,761
3 (5)	Car Giant	-43,807

THE ID10 RETURN ON SALES (ROS) %

2024 rank (2023 ID10)	Company/trading name	ROS %
9 (NEW)	Tom Hartley Jnr	11.1
6 (7)	Trade Centre Group	2.5
7 (8)	Saxton 4x4	2.1
5 (6)	CarSupermarket.com	0.7
2 (3)	Big Motoring World	0.3
8 (10)	V12 Sports & Classics	0.3
10 (9)	Redline Specialist Cars	-0.2
1 (1)	Motorpoint	-1.0
4 (4)	Available Car	-3.0
3 (5)	Car Giant	-4.6

CAZOO – THE ID10 CHALLENGER’S MISTAKE

Cazoo's star burned bright, but quickly. The used car online retailer spent millions of pounds building the brand and acquiring infrastructure, but this approach to capture market share quickly resulted in substantial losses as the associated costs outpaced revenue generation.

Statements from the administrators appointed to help out the creditors left by Cazoo describe its financial challenges as being “driven by a combination of factors, in particular aggressive expansion strategies, a competitive market, high customer acquisition costs and unfavourable economic conditions”.

As the business seemed months from collapse, Cazoo's directors attempted in early 2024 to pivot its business model from a used car retailer into an advertising marketplace, sell off its showrooms, stock and preparation centres, and find a buyer for the new style Cazoo. The company's wholesale arm was acquired by G3 Vehicle Auctions while Constellation Automotive, owner of Cazoo rival Cinch, purchased several assets from the distressed company.

The marketplace business was touted to a total of 64 potential buyers before going into administration, including financial investors and



16 motor retail industry businesses, according to administrators' documents.

As that attempt to sell failed, Cazoo went into administration and the experts at Teneo managed to sell the Cazoo brand and intangible assets to Motors and raise £2.6 million, with a further £2.4m deferred consideration expected to be paid in several months' time.

Teneo is still resolving creditors' claims for Cazoo, which has been renamed CL1 Realisations at Companies House for the

purpose, as the Cazoo brand is now being used by Motors, which launched a new Cazoo app just weeks after buying the brand.

The collapse of Cazoo cost hundreds of UK automotive retail workers their jobs. It was founded with the promise of revolutionising the car-buying experience through online sales, and although it rapidly evolved to also operate physical 'customer experience' sites, it had managed to sell around 160,000 cars prior to its collapse.

deliberate focus on reinstating profit as a priority and the result was “particularly pleasing”, the company's statement says, given the economic and market conditions.

A new preparation centre opened at Hull in December 2022 gave the group an advantage in 2023, and vehicle gross margins improved as more better quality ex-fleet cars became available.

The company took the cost-control decision to close one CarSupermarket.com dealership, at Worksop, in August 2023 and relocated staff to its other sites at Lincoln and Sheffield.

LONG TERM AIM

Since the return to profitability, the focus will be on a return to growth in the year ahead. “Our long-term aim for the future continues to be the goal of becoming the number one choice by consumers for the purchase of a used vehicle in the UK, and we will achieve this by continuing to develop, expand and grow the business with a focus on driving volume growth while still making a good level of profit,” the company says.

Trade Centre Group has also closed one of its dealerships, Trade Centre Birmingham South, but it still has four outlets in the Midlands plus two in Wales. Despite a 7% fall in sales volume to 38,544 units its directors say a strategic focus and careful management of costs enabled it to maintain profitability near to the previous level.

The business is evolving to provide a more flexible working environment and to shift its stock profile to a younger car mix. It remains focused on value-driven buyers, however, and its owner Mark Bailey

says it is committed to positioning itself as a reliable option for car buyers who seek peace of mind during their purchase.

Profits almost halved at Saxton 4x4, although the Chelmsford-based company, which sells cars ranging from BMWs to Ferraris, was able to increase revenues by 3%. With an ambition to scale up growth and sales volume, it acquired two freehold brownfield sites for future development and expansion so it can offer prestige cars on a car supermarket volume scale.

One site is now home to a preparation centre which will deliver efficiencies in getting stock ready for sale.

V12 Sports and Classics had sub-contracted out its own vehicle preparation centre in a bid to find efficiencies, but it reported that this actually had a negative outcome as output decreased, impacting sales and profitability. From December 2022 it took preparation back in-house, and found that this has led to reduced preparation costs of £49 per unit.

2023 was the first full year trading of its latest additional branch in Worksop in an abandoned Evans Halshaw showroom, just metres away from the now closed CarSupermarket.com dealership. The site can stock 350 vehicles and gives the company, which already had dealerships in Stoke, Wolverhampton and Hinckley, a new market area to target.

Managing director Farhad Tailor says: “We anticipate challenges and opportunities in the automotive sector, including the continued shift towards electric vehicles and increased demand

for sustainable practices. Our focus will be on innovation, customer satisfaction and sustainable growth.”

Supercar dealer Tom Hartley Junior has wealthy customers around the world, and the strength of its 2023 performance reveals the astounding reputation of the business in Ashby-de-la-Zouch. Although the number of vehicles sold reduced to 77 from 102 in 2022, the revenues and margins rocketed and, despite increasing the workforce by almost a third, the company made more than £1m profit per staff member.

Tom Hartley Junior's new entry into the ID10 has pushed down fellow pre-owned supercar dealer Redline Specialist Cars into the 10th position. In the Knaresborough-based company's annual accounts its directors say they were happy with the volume of sales achieved but disappointed with the financial results which show a £2.8m swing into the red, as operating costs increased at the same time as margins came under pressure. Measures are in place to drive a recovery this year.

Across the cohort, only four of the groups have increased their workforce. Nevertheless more than 4,300 people now work at companies in this year's ID10, 52 higher than before. Were Cazoo still present the ID10's workforce in UK used car dealerships would have exceeded 5,000 for the first time.

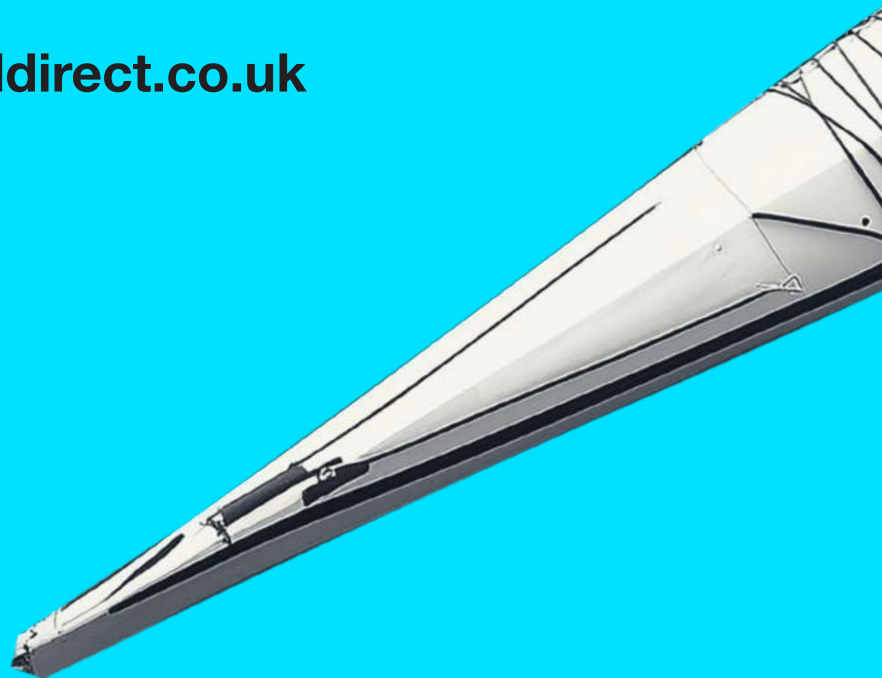
Something common across the ID10 is that all the companies talk about the value of their people, and the investments made in training. As the broader industry continues on the path to mainstream use of electric vehicles, the quality of the ID10's workforce may well be tested.

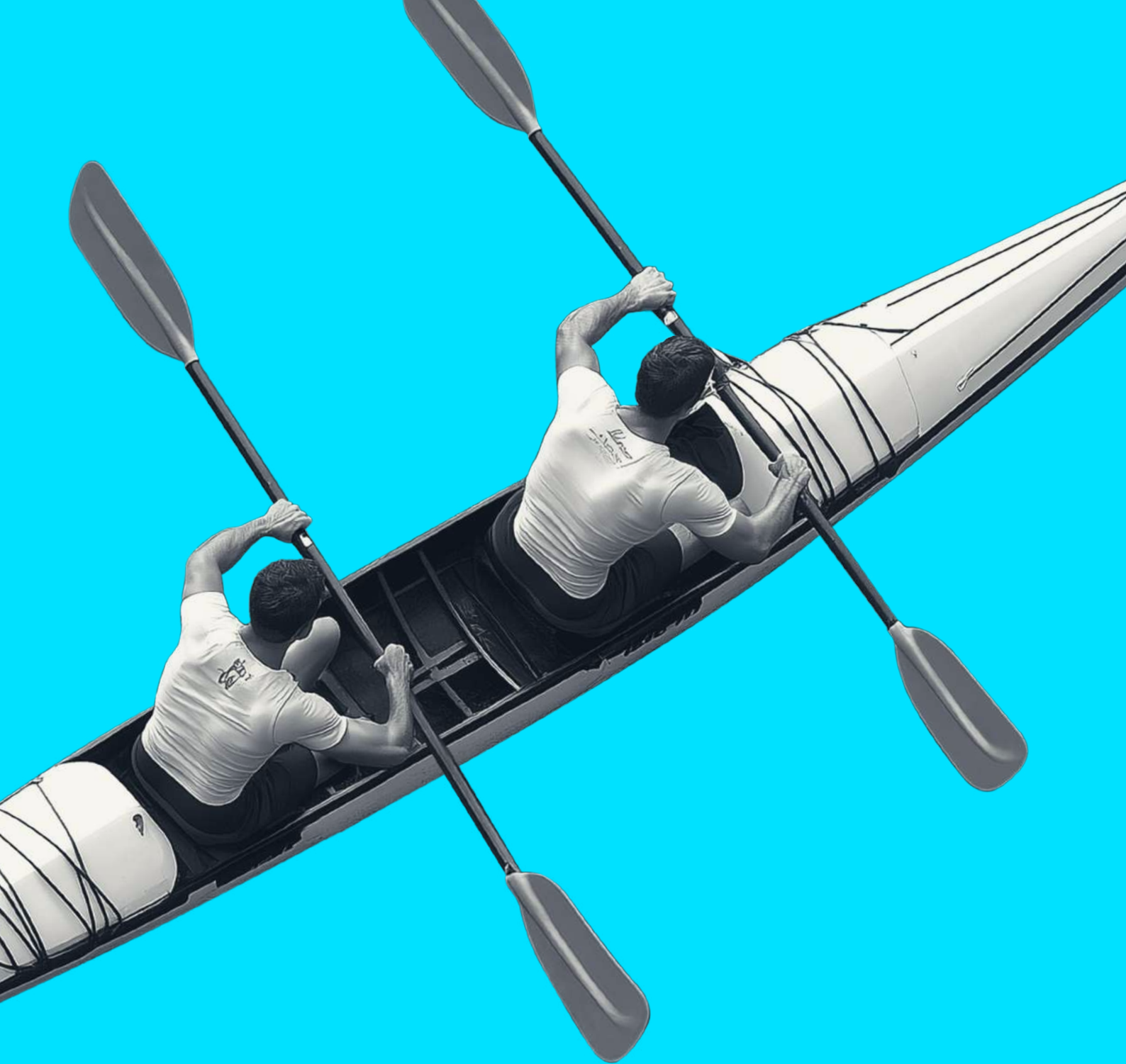
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UPS (AND DOWNS) AMONG THE LEADING CAR BRANDS



Matt de Prez gives an overview of the carmakers to keep an eye on in 2025

AT RISK		SAFE BET			BRANDS TO WATCH	
Alfa Romeo	Subaru	Audi	Mercedes-Benz	Tesla	Alpine	Peugeot
Fiat		BMW	MG	Volkswagen	BYD	Seat
Ford		Cupra	Mini	Volvo	Genesis	Smart
GWM Ora		Dacia	Nissan		Honda	Suzuki
KGM		Hyundai	Porsche		Jeep	Toyota
Mazda		Kia	Renault		Land Rover	Vauxhall
Polestar		Lexus	Škoda		Omoda	

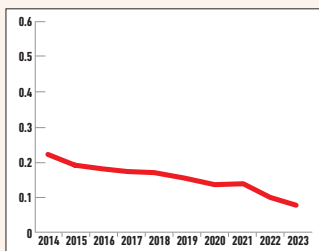
AT RISK

ALFA ROMEO

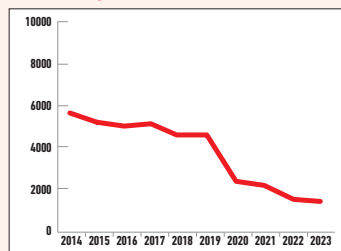
Market share 2014: 0.23 Market share 2024: 0.08

With a tiny market share and little growth in registrations year-on-year, Alfa Romeo continues to be a challenging brand. The introduction of Tonale was meant to bring a much-needed boost in sales, but, so far, it has yet to be realised. There is some hope in the form of Alfa's new Junior compact electric hatchback, which will arrive in showrooms before the end of the year.

Market share



Annual registrations

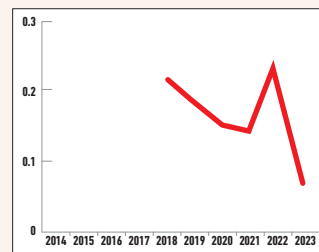


DS

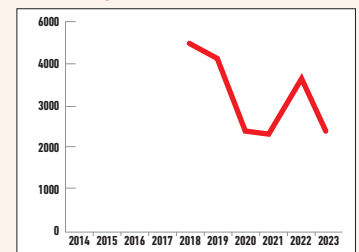
Market share 2014: N/A Market share 2024: 0.07

DS is losing market share year-on-year as its registrations to date have almost halved. Despite this, dealer sentiment has jumped significantly. The French luxury brand is on the cusp of becoming an electric-only brand and a refreshed line-up would be welcome.

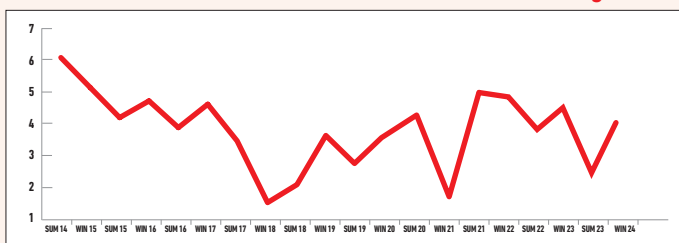
Market share



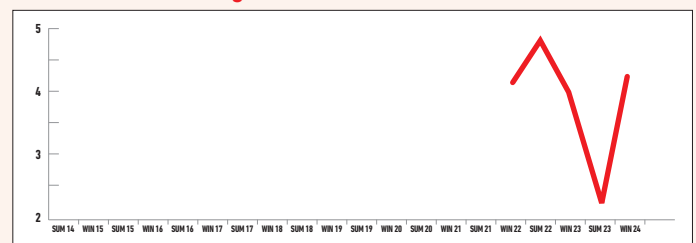
Annual registrations



National Franchised Dealers Association (NFDA) manufacturer rating



NFDA manufacturer rating

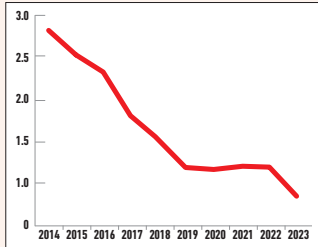


FIAT

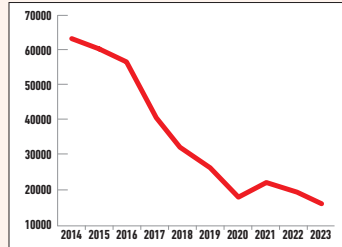
Market share 2014: 2.75 Market share 2024: 0.77

Another struggling Stellantis brand with a line-up that needs an overhaul. Fiat's all-new all-electric 500 has failed to resonate with buyers and the more recently launched 600e is yet to establish itself in the market. Dealer sentiment has improved significantly, despite a decline in registrations this year.

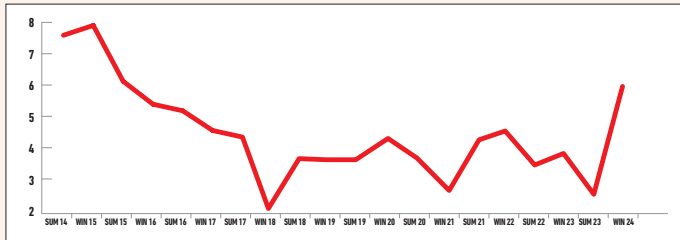
Market share



Annual registrations



NFDA manufacturer rating



GWM ORA

Market share 2014: N/A Market share 2024: 0.07

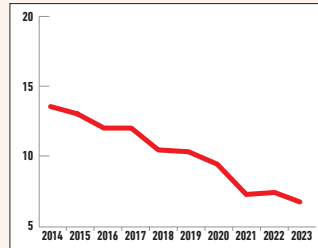
The IM Group's Chinese electric car brand hasn't made much of an impact since it launched two years ago. Sales are up slightly, this year, but its debut model – the O3 – is still the only car on offer. We were expecting the 07 saloon to arrive in the summer, but its introduction has been delayed.

FORD

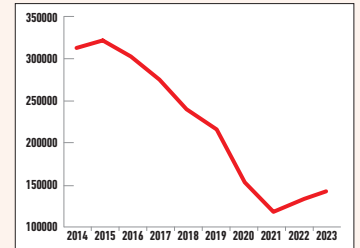
Market share 2014: 13.42 Market share 2024: 5.66

Ford's registrations remain in decline, more than halving the market share it held 10 years ago as the UK's most popular car brand. Today it sells fewer cars than Audi and BMW, as well as rival marque Kia. New electric models are in the pipeline, with the Explorer and Capri sitting on borrowed platforms from VW. However, these newcomers compete in the same segment as its existing Mustang Mach-E.

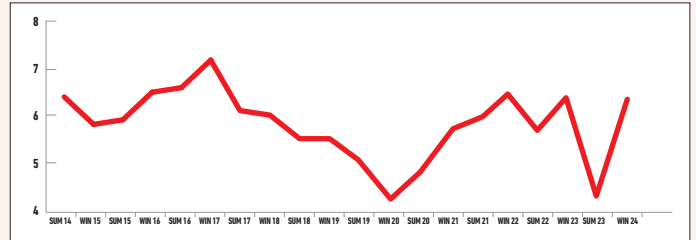
Market share



Annual registrations



NFDA manufacturer rating

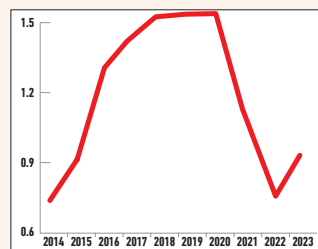


JAGUAR

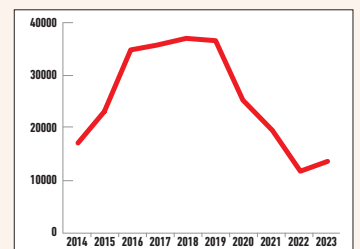
Market share 2014: 0.75 Market share 2024: 0.93

By the end of this year Jaguar will have cut its model line-up to just one car – the F-Pace – ahead of its reinvention as an all-electric brand in 2025. None of its new models has been officially launched, yet, meaning dealers have little to talk to customers about. Dealer sentiment has, unsurprisingly, dropped to the bottom of the ranking.

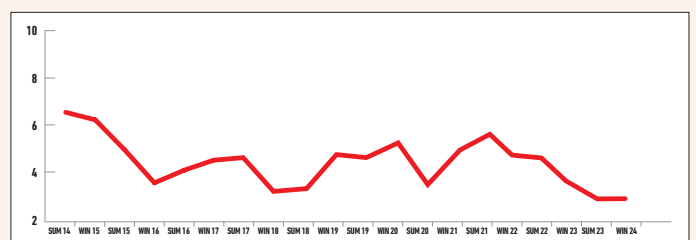
Market share



Annual registrations



NFDA manufacturer rating





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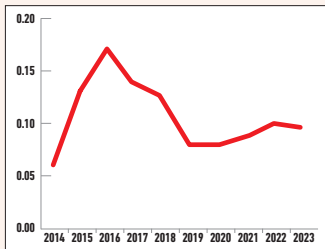
RWA
AUTOMOTIVE

KGM

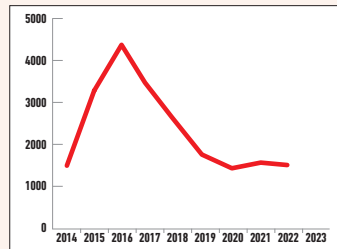
Market share 2014: 0.06 Market share 2024: 0.09

The brand formerly known as SsangYong remains 'at risk' following its relaunch at the start of the year. A line-up of new models was promised, but only the Torres has been introduced to date. The brand's remaining models have simply been rebadged.

Market share



Annual registrations

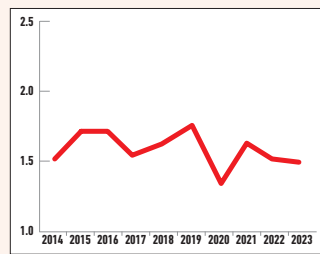


MAZDA

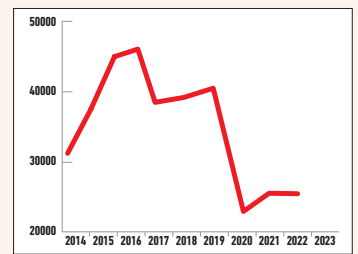
Market share 2014: 1.6 Market share 2024: 1.5

Dealer sentiment is declining as Mazda, like a lot of Japanese brands, is struggling to make the shift to electrified powertrains. Its first and only electric car, to date, the MX-30, has an uncompetitive range and has not resonated well with buyers. Mazda has since introduced a plug-in hybrid version. With the ZEV Mandate targets now in force, the brand will need a more robust line-up of EVs to regain its place as a 'safe bet'.

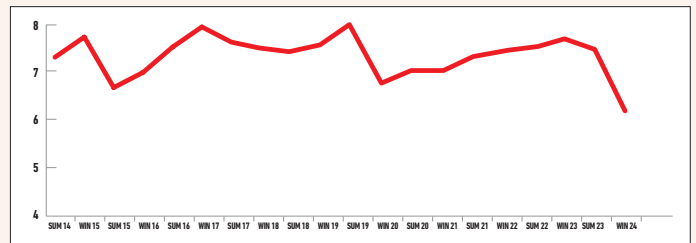
Market share



Annual registrations



NFDA manufacturer rating

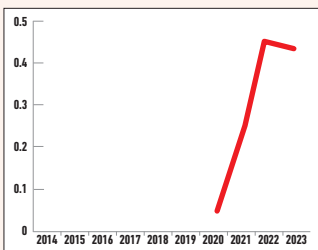


POLESTAR

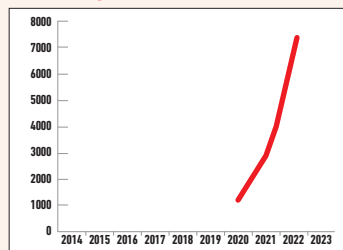
Market share 2014: N/A Market share 2024: 0.42

After a promising start, Polestar has failed to turn a profit. Registrations are down and the expansion of its model range was delayed. A refreshed leadership team and the arrival of the Polestar 3 and 4 are expected to turn the brand's fortunes around.

Market share



Annual registrations

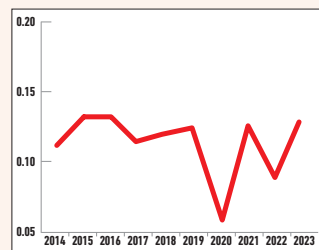


SUBARU

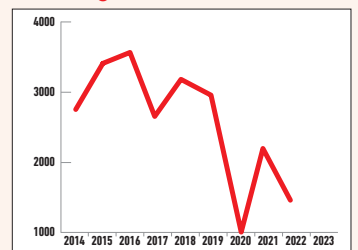
Market share 2014: 0.11 Market share 2024: 0.13

Subaru's low sales volumes remain a threat for its retailer network when compared with rapidly growing new entrants in the UK market. With only a handful of models on offer, Subaru lacks a strong contender in any of the segments in which it competes. The brand does have an EV, albeit it is a rebadged Toyota bZ4x with a higher price tag.

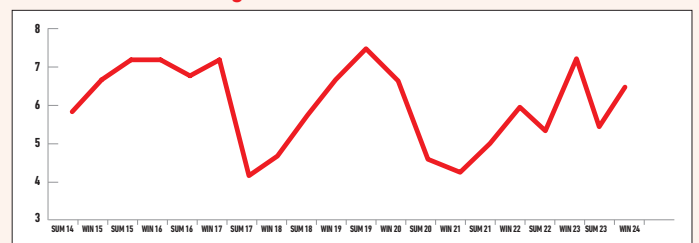
Market share



Annual registrations



NFDA manufacturer rating



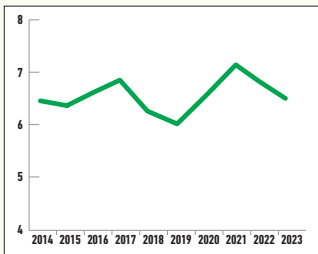
SAFE BETS

AUDI

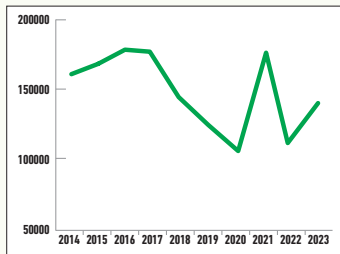
Market share 2014: 6.46 Market share 2024: 6.49

Audi was the UK's third best-selling car brand in 2023 and the most popular premium marque. It continues to shift strong volumes of core models, such as the A3 and Q5, while also strengthening its position in the electric car market with the Q4 e-tron. In 2025, Audi will refresh and replace a large proportion of its line-up.

Market share



Annual registrations

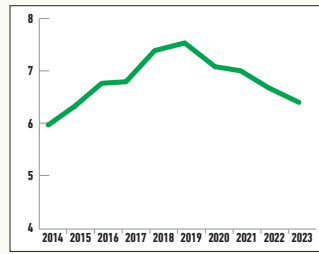


BMW

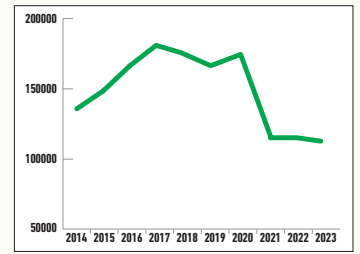
Market share 2014: 5.8 Market share 2024: 6.39

Significant volume growth has been achieved by BMW this year and with numerous new models coming in 2025, the brand is set to remain on an upwards trajectory. Dealer sentiment remains strong, ranking third overall. BMW is also a top fleet performer, where models like the iX1 and i4 are top sellers.

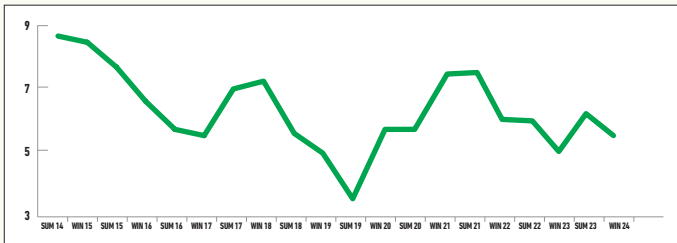
Market share



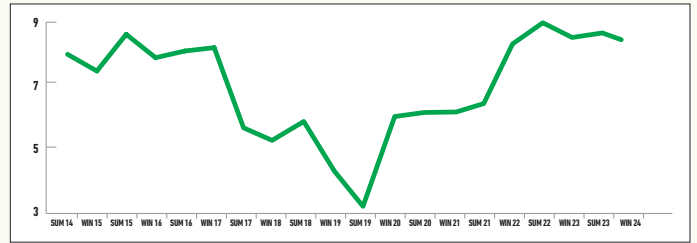
Annual registrations



NFDA manufacturer rating



NFDA manufacturer rating

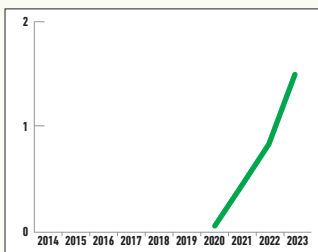


CUPRA

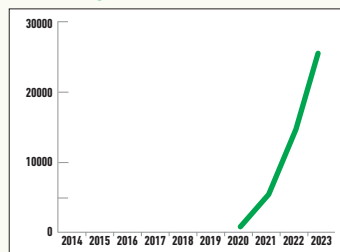
Market share 2014: N/A Market share 2024: 1.51

Cupra continues to grow at pace despite its current line-up being largely based on existing Seat models. Things will change rapidly as a new range of models arrive in showrooms shortly. The Born will be joined by the larger Tavascan. There's also a large plug-in hybrid SUV, called Terramar, and Cupra's hotly anticipated small car, the Raval. If that's not all, the Leon and Formentor have also been given a facelift.

Market share



Annual registrations

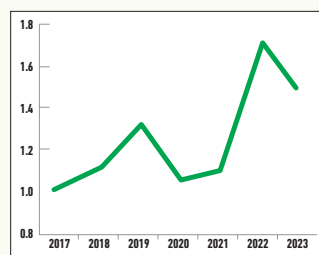


DACIA

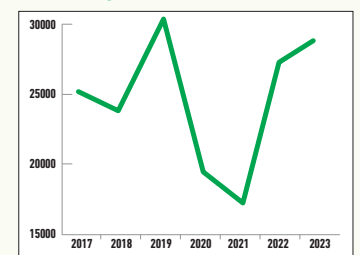
Market share 2014: 0.95 Market share 2024: 1.52

As the budget arm of the Renault Group, Dacia has been focused on providing low price petrol and hybrid models. A major brand overhaul took place in the past year, bringing a fresh look to Dacia's dealerships and a revised car line-up. Dacia will enter the C-SUV segment for the first time with its Nissan Qashqai-rivalling Bigster. It is now taking order for its first electric car, a compact and low-priced model called Spring.

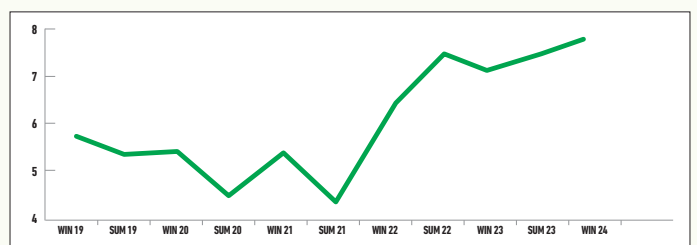
Market share



Annual registrations



NFDA manufacturer rating





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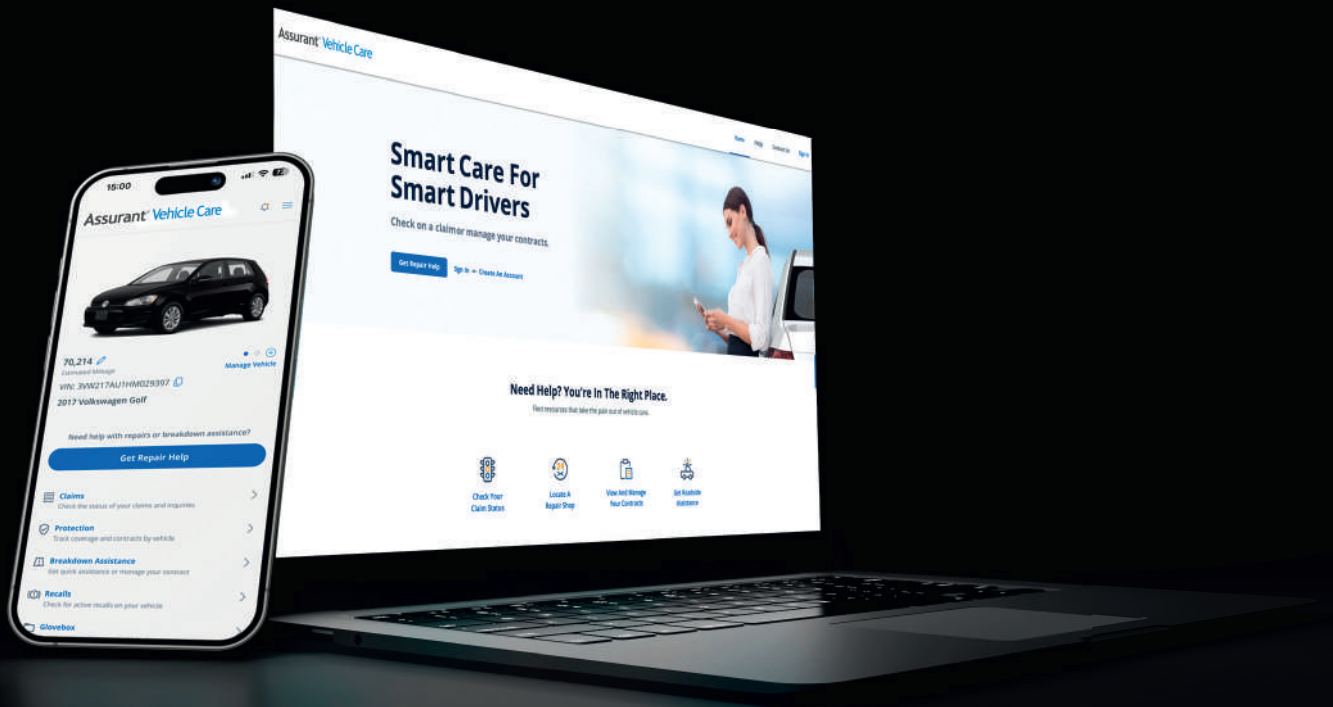
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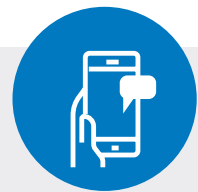
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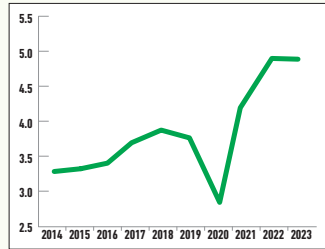
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HYUNDAI

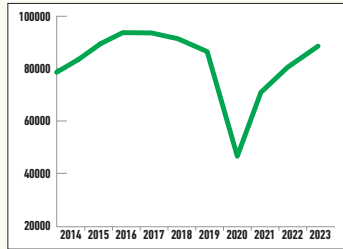
Market share 2014: 3.35 Market share 2024: 4.8

Hyundai rewrote the rule book for performance electric cars this year, with the introduction of the Ioniq 5 N. It complements an ever-evolving line-up of desirable models in high-volume segments from the brand. Sales of electric models have grown by 46% in the past year, while alternative-fuel vehicles now make up more than half of Hyundai's registrations.

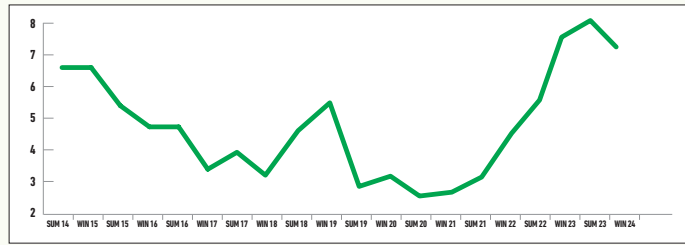
Market share



Annual registrations



NFDA manufacturer rating

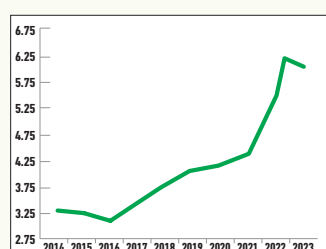


KIA

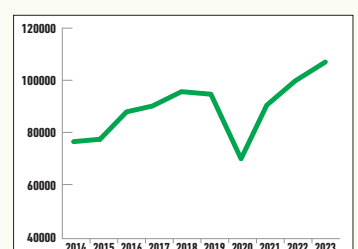
Market share 2014: 3.19 Market share 2024: 6.1

Kia is on track for another record-breaking year, having reached the 100,000 registrations mark in 2022. Market share continues to climb and the brand retains its top spot in the NFDA's dealer sentiment survey. Sales have in no small part been aided by Kia's dominance of the Compact SUV segment, with Sportage, Niro and Xceed all selling in high volumes. Before the end of the decade, Kia will have expanded its remit beyond cars and into the commercial vehicles space.

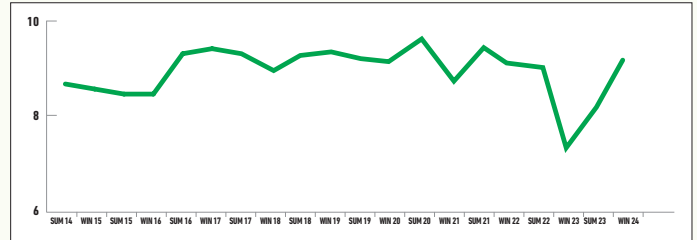
Market share



Annual registrations



NFDA manufacturer rating

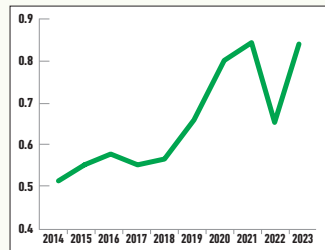


LEXUS

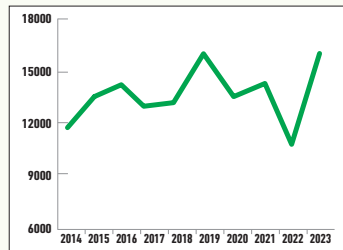
Market share 2014: 9.2 Market share 2024: 9

When it comes to customer and dealer satisfaction, Lexus sits ahead of the pack. While its model range is still heavily geared towards hybrids, the company's sales and market share remain on an upward trajectory. Price cuts were applied to various models in the Lexus range this year, increasing the value proposition of its cars.

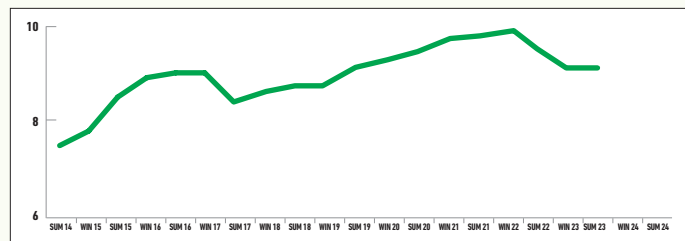
Market share



Annual registrations



NFDA manufacturer rating

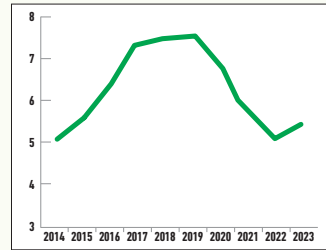


MERCEDES-BENZ

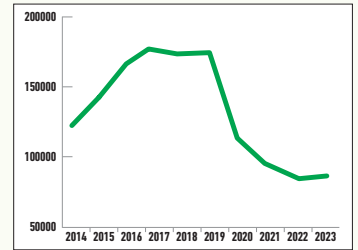
Market share 2014: 7.0 Market share 2024: 8.2

After a challenging 2023, Mercedes seems to be back on track in 2024. Sales are up YTD and dealer sentiment has been boosted. It has a large line-up of EVs and plug-in hybrids in almost every segment, giving buyers a much wider choice than others. Its future strategy will see it exit high-volume segments, where its A-Class and B-Class competes, in favour of luxury ones.

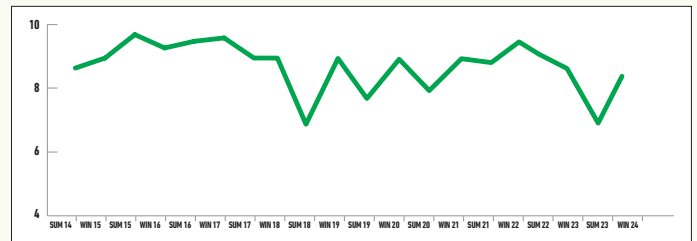
Market share



Annual registrations



NFDA manufacturer rating



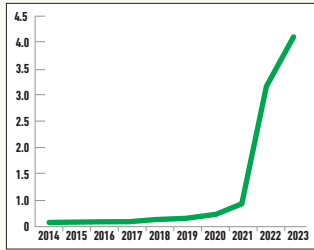
MG MOTOR UK

Market share 2014: 0.09

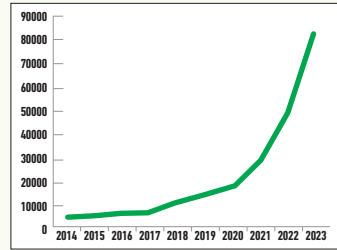
Market share 2024: 4.11

MG has delivered an astounding performance in recent years. While the brand's rebirth had a slow start, it has managed to establish itself as a leader in the budget segment, picking up sales from the likes of Hyundai and Kia as they moved upmarket. MG's strong model line-up has also seen it compete aggressively in the fleet market, where its range of EVs are among the cheapest in their segments.

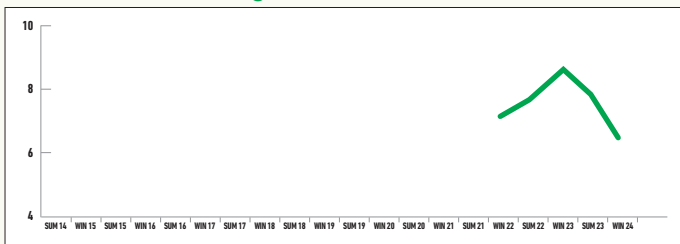
Market share



Annual registrations



NFDA manufacturer rating



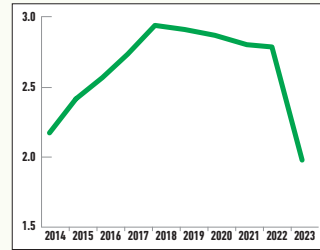
MINI

Market share 2014: 1.87

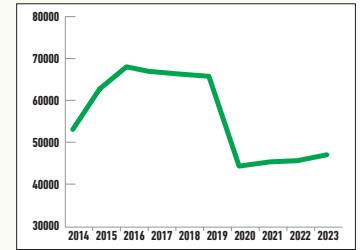
Market share 2024: 1.99

Mini retailers have been lumbered with an aging model range for the past year, but that's all changing now. The brand, which shares first place with Kia in the dealer sentiment survey, has a fresh three-model line-up. Mini Hatch is all-new and includes a second-generation electric model that is significantly more capable than its predecessor. It's the same with Countryman and sitting between the two is the new Aceman, which enters the compact electric SUV segment.

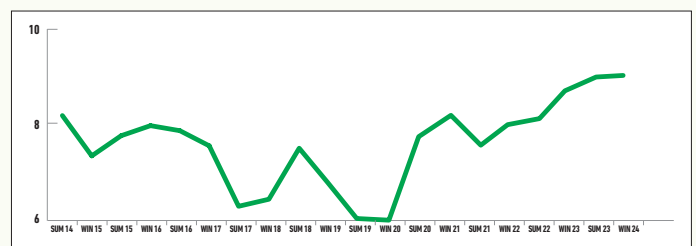
Market share



Annual registrations



NFDA manufacturer rating



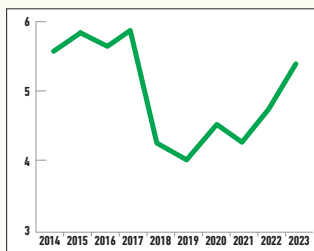
NISSAN

Market share 2014: 5.46

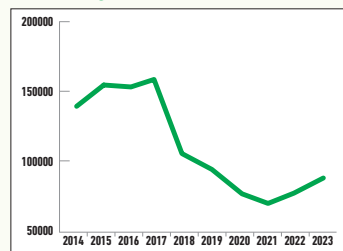
Market share 2024: 5.34

Strong sales keep Nissan in the 'safe bet' category this year, along with the promise of a refreshed electric line-up. Its success hangs largely on the strength of the Juke and Qashqai, both powered by internal combustion engines. Despite being a frontrunner in the affordable electric car space, Nissan hasn't kept pace with rivals like Kia or VW. An electric Juke and Qashqai are coming, along with a new Leaf, which should help it regain market share.

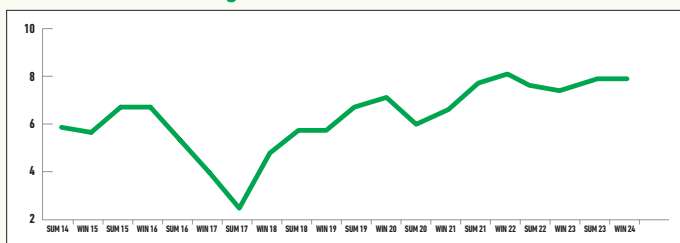
Market share



Annual registrations



NFDA manufacturer rating



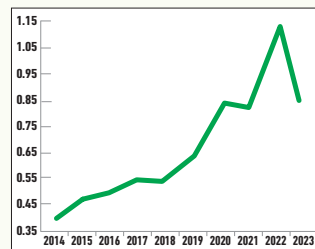
PORSCHE

Market share 2014: 0.33

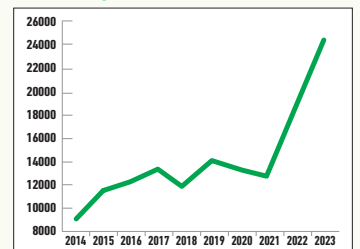
Market share 2024: 0.85

Porsche registrations are down YTD but it's on the cusp of renewing its best-selling Macan, as well as launching updated Panamera and Taycan models. Demand remains incredibly strong for Porsche's limited edition models, but a saturated market for used ex-fleet Taycans continues to pose a challenge for dealers.

Market share



Annual registrations



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Staff Quality Dealership Puncture Dissatisfied
Problem Advisor Issue Delay

NPS Rating: Passive

The customer expressed general satisfaction with the dealership, noting they were well-informed and their issues were resolved, though they felt the service "just did the job." They couldn't recall their service advisor's name, indicating a lack of personal connection. When asked to complete a survey, the customer replied, "if I've got time I will," suggesting limited motivation to actively promote the dealership.

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Andy Coulthurst
Chairman, The Trade Centre



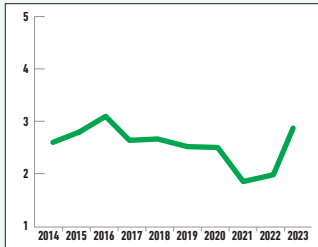
Direct
Affinity CX

RENAULT

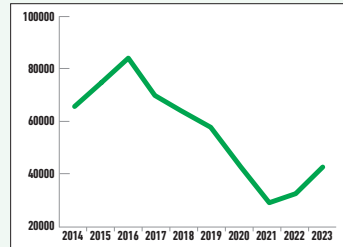
Market share 2014: 2.59 Market share 2024: 2.83

The 'Renaulution' is in full swing and Renault continues to bring fresh, desirable models to market. Advanced in-car tech and high spec levels help it compete well with cars from premium brands, while low pricing puts it ahead of mainstream rivals. Registrations have surged, this year, as a result.

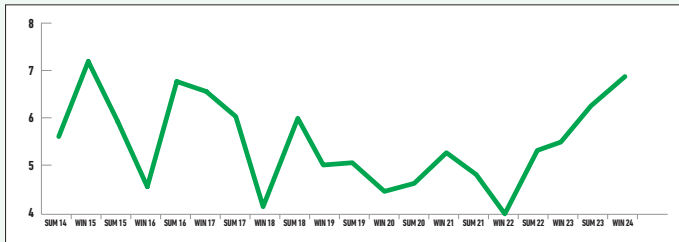
Market share



Annual registrations



NFDA manufacturer rating

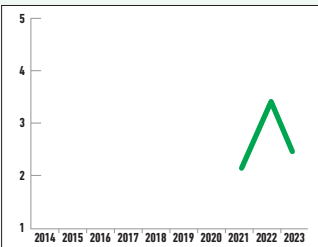


TESLA

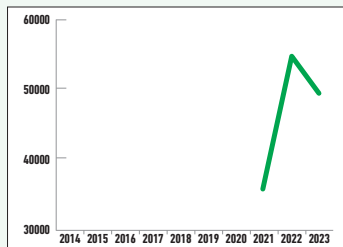
Market share 2014: N/A Market share 2024: 2.39

It may only have two models, but both are best sellers in their respective markets. Tesla has been a major disruptor in the UK automotive space. It has a slick, digitally-led direct sales model with extremely quick delivery times. The Model 3 was refreshed at the start of the year and similar updates are expected for the Model Y in 2025.

Market share



Annual registrations

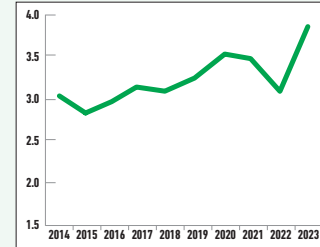


ŠKODA

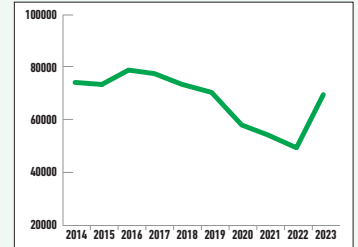
Market share 2014: 3.08 Market share 2024: 3.84

Škoda enjoyed a strong 2023 and is having an even stronger 2024. While it can't quite match the market share of Hyundai or Kia, it does have a decent hold on the mainstream market. Most of its models have been updated or replaced in the past year – the Kodiaq and Superb are all new. There's also the new Elroq, an electric compact SUV, coming in 2025.

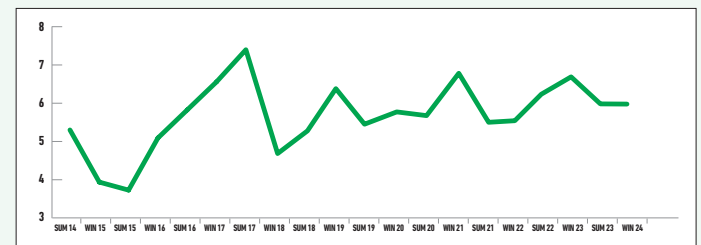
Market share



Annual registrations



NFDA manufacturer rating

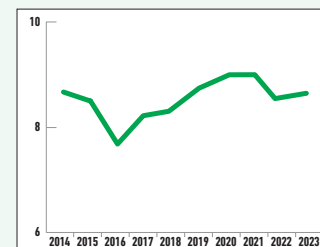


VOLKSWAGEN

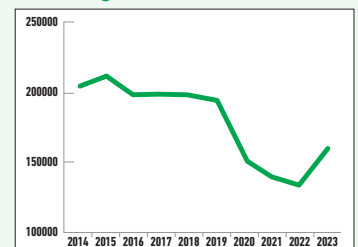
Market share 2014: 8.61 Market share 2024: 8.49

Volkswagen has struggled with component shortages and software issues, yet it is delivering growth in its registrations this year. Market share remains slightly lower than it was 10 years ago as competition heats up from the likes of Kia and MG. New Passat and Tiguan, along with updated Golf, should bring renewed interest to the brand.

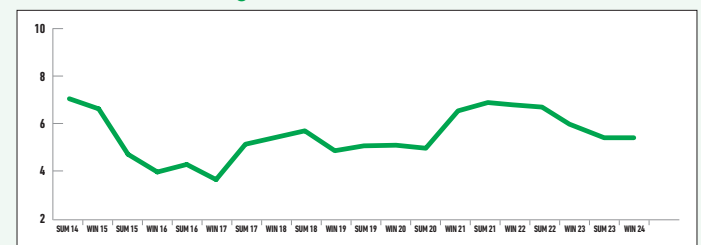
Market share



Annual registrations



NFDA manufacturer rating

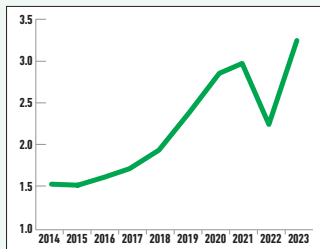


VOLVO

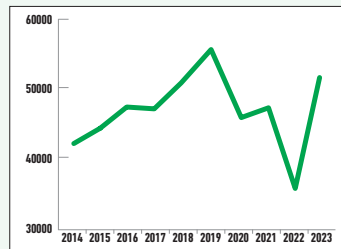
Market share 2014: 1.57 **Market share 2024: 3.25**

Will it become a fully electric brand, or won't it? Volvo has been forced to adapt its strategy more than once this year. The promise of all new Volvos being electric in 2030 has been adjusted to 90%. It has also relaunched the V60 and V90 estates, after moving to an SUV-only line-up in 2023. Customers are clearly unphased as sales continue to roll in at an impressive rate of growth.

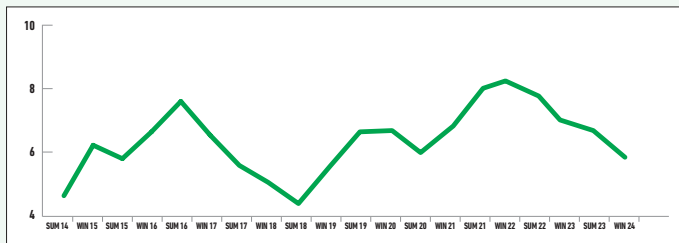
Market share



Annual registrations



NFDA manufacturer rating

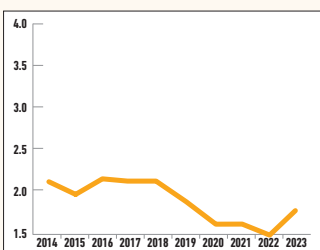


HONDA

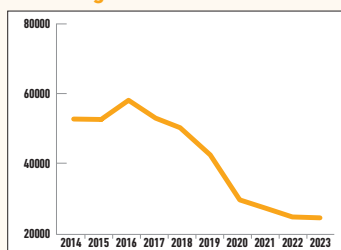
Market share 2014: 2.25 **Market share 2024: 1.78**

Honda has achieved a significant boost in electric vehicles sales this year, allaying fears that it would face large penalties from the ZEV Mandate. The success comes from its e:NY1 crossover. Honda also launched its first plug-in hybrid this year, adding the powertrain to its CR-V model. Dealer sentiment remains high.

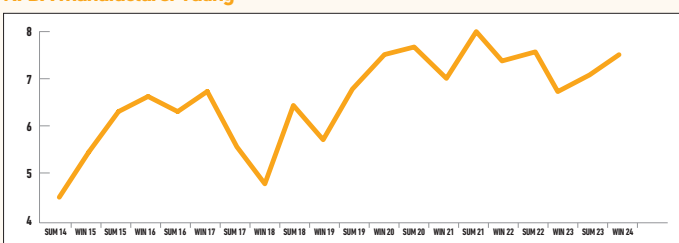
Market share



Annual registrations



NFDA manufacturer rating



ONES TO WATCH

ALPINE

Market share 2014: N/A **Market share 2024: 0.02**

Alpine is set to become the Renault Group's first all-electric brand. It will transition from having just one petrol model to a full range of electric cars in the next few years. The A110 has helped to establish the brand in the UK, but a single sports car is not sustainable in the longer term.

BYD

Market share 2014: N/A **Market share 2024: 0.35**

A strong first year has enabled BYD to establish itself as a real threat to rival manufacturers. A retail network is being built with plans for 100 sites by 2025. The brand has work to do, however, to grow its registrations to a sustainable level. Having launched with an all-electric line-up, BYD's first plug-in hybrid – the Seal U DM-i – is about to go on sale. It's also planning a range of vans.

GENESIS

Market share 2014: N/A **Market share 2024: 0.06**

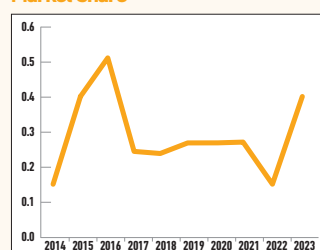
Having launched with a VIP-style 'we-come-to-you' approach, Korea's luxury brand Genesis has been forced to change tack due to slow sales. It now sits within Hyundai Motor UK, bringing a range of back-office efficiencies. Its new strategy includes opening a network of retail sites.

JEEP

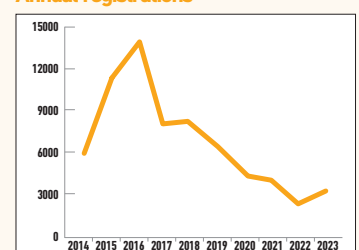
Market share 2014: 0.15 **Market share 2024: 0.4**

Jeep is turning its fortunes around thanks to introduction of the Avenger. The compact SUV has enabled the brand to double its sales year-to-date. It's also Jeep's first electric model. There's more to come, too. Replacement Renegade, Compass and Wrangler models are all due soon.

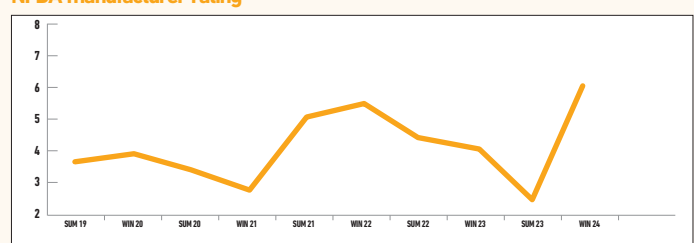
Market share



Annual registrations

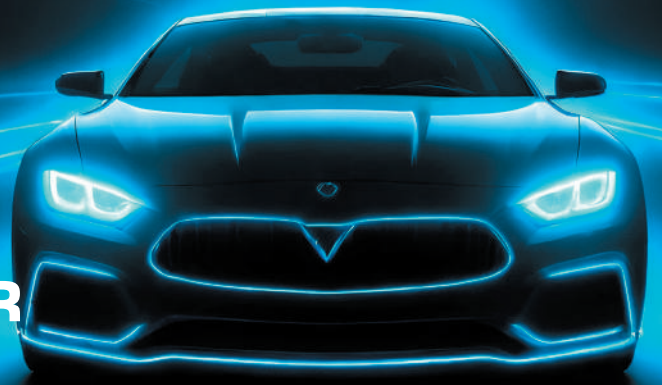


NFDA manufacturer rating



XCCELERAITE

XCCELERAITE YOUR BUSINESS WITH THE POWER OF AI.



"XccelerAite houses a suite of Ai-powered solutions that enables automotive retailers and OEM's to create consistent, scalable, automated and Ai-powered videos. These solutions are for clients of all sizes and require zero operational changes, delivering high-quality outputs at scale within seconds across a multitude of different channels and platforms."

Billy Coutin, Chief Executive Officer at XccelerAite.

At XccelerAite, we provide cutting-edge Ai technology designed specifically for the automotive industry to boost revenue opportunities and drive efficiencies throughout your business. We have a simple mantra of **CAPTURE. AUTOMATE. ENGAGE. CONVERT.** We harness the power of data-driven models and Ai-powered solutions to capture and automate repetitive tasks to drive personalised engagement that results in optimal conversions.

CREATE AI-DRIVEN AUTOMATED VIDEOS AT SCALE.

Ai Video Automation is a transformative solution designed to cater to clients and partners of all sizes, requiring zero operational changes while delivering high-quality video outputs at scale within seconds across various channels and platforms. Our innovative platform leverages Artificial Intelligence to create dynamic, personalised video content that showcases vehicles in their best light, engages potential buyers and drives conversions.

YOUR ENTIRE STOCK, FULLY AUTOMATED.

By automating the video creation process, retailers can efficiently highlight key features and benefits of their stock, enhancing customer experience and accelerating sales. With real-time connectivity and outputs automated in seconds, Ai Video Automation eliminates the need for heavy resourcing requirements, ultimately driving efficiencies, ensuring consistency, and increasing conversions.



Transform shoppers into buyers:

100%

consistency with uniform videos.

17%

more leads vs just static imagery.

78%

increase in consumer engagement.

Why is this important:

95%

of consumers retain a message sent by video vs 10% when through just text.

75%

of car buyers said video has influenced their purchasing habits and decision-making.

69%

of customers would have purchased Value-Added Products if presented earlier in the journey.



DIGITAL INNOVATION WITHOUT THE COMPLICATION.

Digital innovation is nothing without meaningful integration. That's why XccelerAite ensures integrations with the most trusted names in automotive technology, from CRM systems to DMS and Digital Retailing platforms, meaning that your business will never skip a beat. We know even the most impressive of products can be meaningless if their potential is harnessed in the wrong way. We pride ourselves on creating harmonious digital ecosystems, where every solution integrates effortlessly with your existing unique processes, to create a holistic and complementary digital infrastructure that drives your growth.

Book a 20-minute digital discovery session to see how XccelerAite can drive transformational growth. To find out more, please visit www.xccelerate.ai or email enquiries@xccelerate.ai

DIGITAL & ANALYTICS ENABLEMENT.



GardX Connect is a pioneering digital & analytics ecosystem designed to maximise every Value-Added Products & Insurance opportunity for clients, whatever the consumers channel of choice.

We understand today's omni-channel world, therefore, we are the only partner that provides clients with a fully white-labelled digital and analytics ecosystem to ensure exceptional consumer engagement.

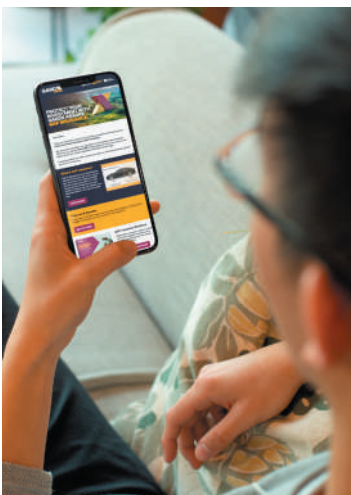
We have developed an innovative digital ecosystem (GardX Connect) and a suite of support services for clients to leverage as a core 'enabler', so that they can maximise Value-Added Products and Insurance opportunities that transform their business growth.

Designed for clients to turbocharge both Value-Added Products & Insurance sales and consumer service through digitalisation, automation, and optimisation, GardX Connect is an ecosystem that will revolutionise the omni-channel experience.

At a time when many organisations are seeking to optimise business growth and maximise conversions and profitability, the solutions delivered through GardX Connect are critical in preparing the industry for the consumer of the future. Developed to make an immediate impact for clients with rapid deployment capability, GardX Connect is available as a fully adopted ecosystem or through seamless integrations into clients existing business processes and systems.

PRODUCT RESOLICITATION SOLUTIONS.

Enabling targeted multi-channel campaign execution via marketing automation and event triggered nurturing cycles.



CASE STUDY

AM Top 10 Dealer Group

78%
Open rate.

24%
Click through rate.

10.4%
Conversion rate.

DIRECT-TO-CONSUMER E-COMMERCE PRODUCT JOURNEY.

Our solution enables consumers with a self-serve facility to purchase Value-Added Products and Insurance online at their convenience.



CONSUMER CARE PORTAL.

This platform handles all 'in life' requirements, from product information to claims and support.



87%
reduction in claims processing time.

A SUITE OF REAL-TIME AND INTERACTIVE ANALYTICS DASHBOARDS.

Driving clients performance and data-driven decision making via our insights suite.



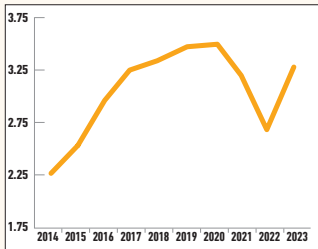
To find out more information on how GardX Group can support you and your business across vehicle protection, insurance products and digital solutions, please visit www.gardxgroup.com or email enquiries@gardxgroup.com

LAND ROVER

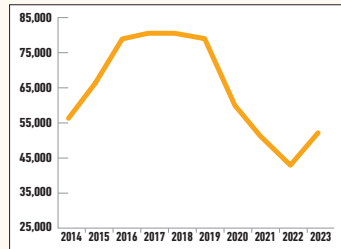
Market share 2014: 2.32 Market share 2024: 3.23

Dealer sentiment remains low, but that hasn't stopped Land Rover enjoying a sales boom. It hasn't come without challenges, however. Action to rectify thefts of cars with keyless entry has put pressure on retailers this year. Land Rovers remain highly desirable and demand for the upcoming electric Range Rover is already high.

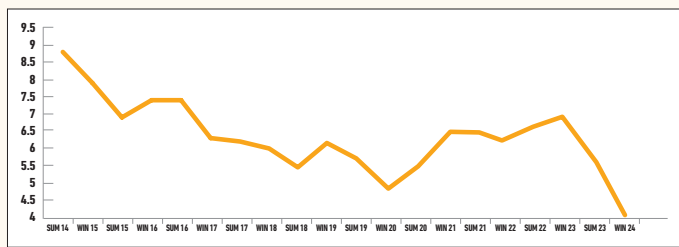
Market share



Annual registrations



NFDA manufacturer rating



OMODA

Market share 2014: N/A Market share 2024: N/A

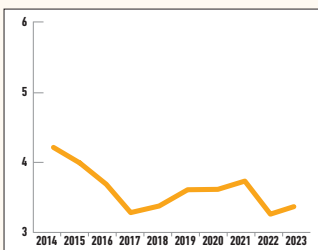
Omoda has only just started sales in the UK, but it's launching with plenty of promise. The Chinese brand is in the process of building a retailer network and will offer a range of keenly priced petrol and electric models to rival MG. The Omoda 5 will be the first car to arrive, after a delay in its planned introduction earlier this year. Its premium sister brand, Jaecoo, with which it shares show-rooms, gets its first SUV in Q1 2025.

PEUGEOT

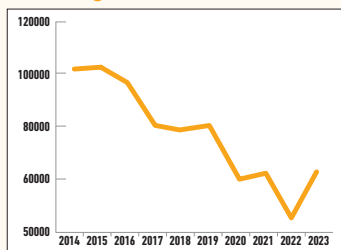
Market share 2014: 4.36 Market share 2024: 3.36

Peugeot is slowly clawing back the market share it once held, but has some way to go. The new 3008 and electric E-3008 are the first cars to launch using an all-new Stellantis platform and the recently launched E-408 means there's now an electric version available of every Peugeot model. Dealer sentiment has risen, recently, too.

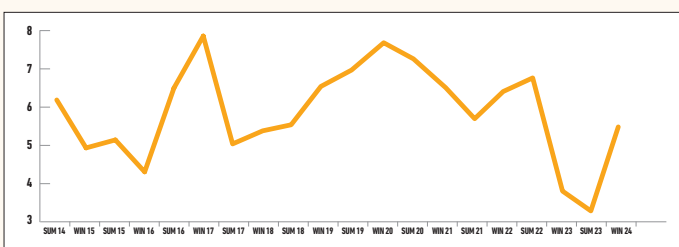
Market share



Annual registrations



NFDA manufacturer rating

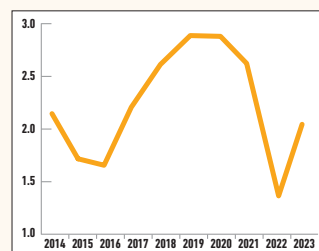


SEAT

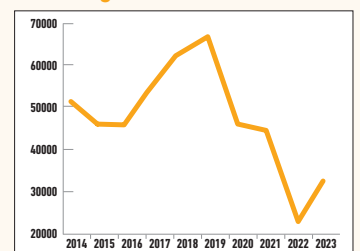
Market share 2014: 2.18 Market share 2024: 2.06

Seat sales took a hit last year after the Volkswagen Group announced that it was going to curtail the brand and focus on sportier Cupra instead. The future of Seat is looking brighter, however. Bosses have revisited the strategy and decided to give Seat a lifeline. Its range is being facelifted and will run until the end of the decade. Electric models will start to launch in the lead-up to 2030.

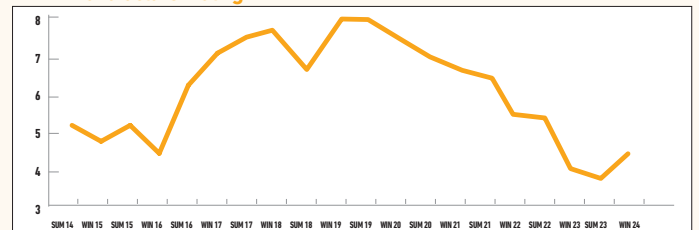
Market share



Annual registrations



NFDA manufacturer rating

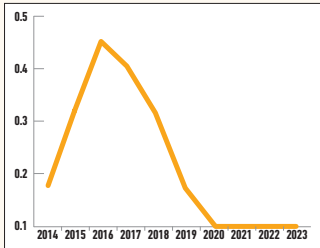


SMART

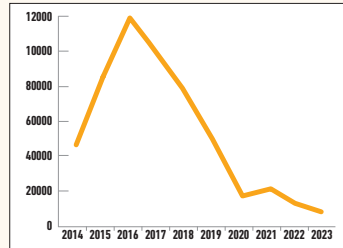
Market share 2014: 0.21 **Market share 2024: 0.11**

Following its re-invention as a joint venture between Geely and Mercedes, Smart has been a slow burner. Only 1,725 cars were registered in 2023 and sales this year have only picked up slightly. Its debut model, the #1, has since been joined by the #3. The next car to launch is the #5, a boxier SUV.

Market share



Annual registrations

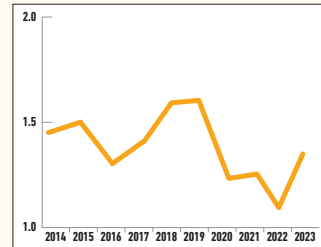


SUZUKI

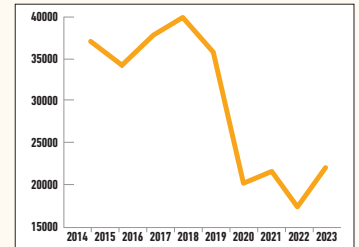
Market share 2014: 1.61 **Market share 2024: 1.37**

Suzuki's model line-up may be a little dated and it is yet to introduce an EV to its range, yet the brand has established a loyal customer base that it continues to serve well. Suzuki repeatedly tops customer satisfaction tables and has retained a high NFDA dealer sentiment score. Sales have plateaued this year, but older models are being cut to make way for fresh electric ones.

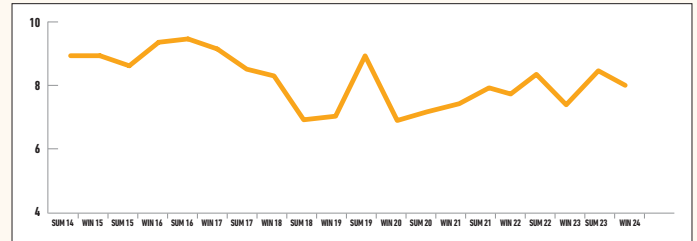
Market share



Annual registrations



NFDA manufacturer rating

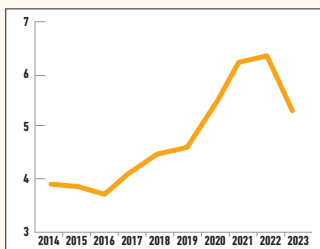


TOYOTA

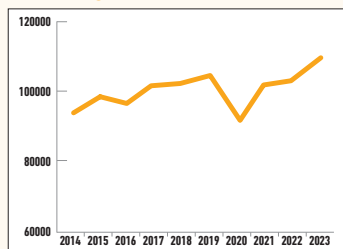
Market share 2014: 3.88 **Market share 2024: 5.24**

Toyota is on the cusp of a major model overhaul, with numerous electric and plug-in hybrid options on the horizon. A boost in electric sales is needed to avoid ZEV Mandate fines, although Toyota's current powertrain strategy of offering hybrids is delivering strong sales.

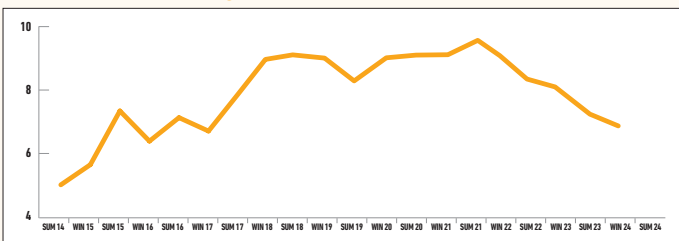
Market share



Annual registrations



NFDA manufacturer rating

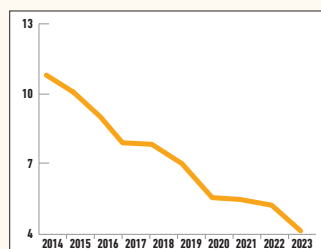


VAUXHALL

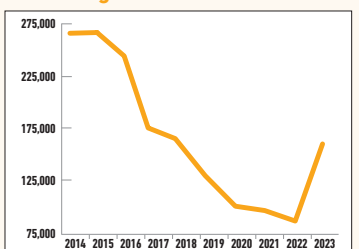
Market share 2014: 10.74 **Market share 2024: 4.19**

A lengthy period of declining registrations could be coming to an end for Vauxhall, as its sales at the end of September were slightly ahead of last year. The once dominant brand is now outsold by Kia and its revitalised model range has not yet delivered the numbers. Price cuts have been applied to ensure its cars are more competitive and the introduction of a new Grandland model, along with the revived Frontera secure its place as "one to watch".

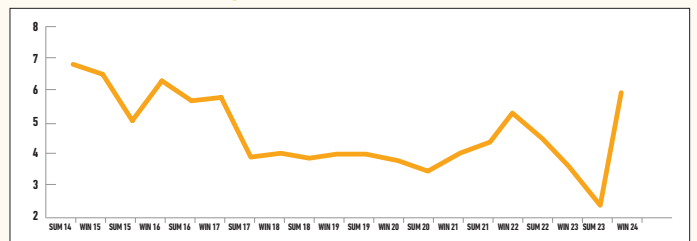
Market share



Annual registrations



NFDA manufacturer rating



LIQUIDLINE

The UK's No.1 Supplier to Automotive Dealer Groups



COME SEE
US AT
STAND B20

TRANSFORMING SHOWROOM REFRESHMENTS

It's no secret that providing an impactful showroom experience is a simple way

to increase sales. A cup of coffee is a simple way to make a customer feel welcome and valued. It's a small gesture that can make a big difference. At Liquidline, we provide high-quality refreshments for automotive dealerships across the UK. Our coffee is sourced from the best beans and brewed to perfection. We also offer a range of other refreshments, including tea, water, and soft drinks. Our refreshments are delivered to your dealership on a regular basis, so you can always have what you need. Contact us today to learn more about our services.

CONSUMER EXPECTATION

Consumer expectations for refreshments in a showroom are high, and to meet these expectations, dealerships need to provide a high-quality experience. This means offering a range of refreshments that are both delicious and convenient. At Liquidline, we understand this need and provide a comprehensive refreshment service for automotive dealerships. Our coffee is sourced from the best beans and brewed to perfection. We also offer a range of other refreshments, including tea, water, and soft drinks. Our refreshments are delivered to your dealership on a regular basis, so you can always have what you need. Contact us today to learn more about our services.





BARISTA QUALITY COFFEE

Bean to cup coffee machines are nothing new in the automotive sector, but until recently a coffee from one of these machines never quite stood up to a Barista-crafted brew, especially for milk-based drinks.

The great news though is that over the past few years manufacturers like Schaerer have refined their milk foaming technologies on automated machines to **create perfect snow-white peaks** of milk foam. Now your sales team can serve barista quality drinks with a few taps on screen. Furthermore, thanks to quick pour technology, these **customer-wowing drinks** are prepared in seconds, freeing salespeople up to close the deal.



SEASONAL DRINKS

Did you know that in **Q3 of 2024 Google searches for 'Pumpkin Spiced Latte' increased by 6,000%**? Driven by big high-street brands, the appetite for seasonal flavoured drinks is here to stay.

Cool off your customers with an iced coffee in summer, warm up a sale with a spiced pumpkin latte in autumn or add a bit of festive cheer in winter with a gingerbread hot chocolate.

You don't need a trained Barista to offer seasonal drinks either. At Liquidline **we do all the thinking for you, curating a menu of easy to prepare drinks** that can be prepared using your existing equipment and a few extra ingredients.



PLANT BASED MILKS

Research suggests that **1/3 of Brits now favour plant-based milk**, with oat milk the most popular. By providing dairy-free milk alternatives with your coffee facilities, you are demonstrating thoughtfulness and inclusivity to all customers.

For dealerships looking to offer alternative milks, a dual milk fridge automated bean to cup machine such as the Schaerer Soul 12, is a great option as it offers two milk varieties from the same unit.



NEXT GENERATION HYDRATION

Meet the Aquablu REFILL+, a **smart hydration system** that offers a wide range of unique and tasty **flavoured water combinations**, as well as standard filtered and sparkling water.

Customers can choose from Mango Guava, Fresh Lemon, Peach or Raspberry Pomegranate flavours, each available in **still and sparkling**, and **enhanced with added vitamins and minerals**.

TAKE A TEST DRIVE TODAY

Liquidline is the **trusted coffee and water supplier** to over half of UK dealerships. With a dedicated Automotive Accounts Team, we provide a **specialist consultative approach** with **5-star service** and technical support.

Get in touch for a free on-site demo or visit one of our showrooms.

Contact us today to enhance your showroom experience with exceptional refreshments
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**“ OEMs
HAVEN'T
WALKED
AWAY FROM
THE CHALLENGE
OF ZEV... ”**

**MARTYN WEBB,
HOLDEN GROUP MD**

MARTYN WEBB, MANAGING DIRECTOR, HOLDEN GROUP

STEERING THROUGH A HUGE PERIOD OF CHANGE

Martyn Webb is grasping new opportunities back at the group where he started his career. *Tom Seymour* reports

Sometimes things just come full circle. Martyn Webb started his career at Norwich-based Holden Group and has returned 26 years later to lead it into the future.

Webb's return to Holden signifies more than a nostalgic homecoming; it's a strategic alignment of experience, vision and adaptability.

The seven-site group, which has locations in Norfolk and Suffolk, is preparing for its next chapter of growth and Webb has a unique perspective, particularly in relation to the level of flux the industry is experiencing right now with changes to the retail model, as well as electrification.

Webb started at Holden in 1997 as a sales executive for the Chrysler Jeep franchise and spent 10 years with the business to work his way to general sales manager.

He told *AM* that, while his time at Holden helped establish his approach to customer care, Webb wanted to push outside his comfort zone in order to develop further.

Six years as a dealer principal with Sytner in Bristol gave a taste for how things work in a larger corporate group environment and then a general manager position at manufacturer-owned Mercedes-Benz Retail Group (MBRG) in Stockport gave him another lens through which to view the industry.

AN ADVOCATE FOR CHANGE

Part of what motivates Webb is embracing change, something he acknowledges the automotive industry is not necessarily well known for.

He says: "Some people in the industry want to hold on to what they know. It could be a comfort thing, but they may also have robust results to prove that how they've always done things should be the way things stay."

"I've always wanted to see how things evolve and be at the forefront of change, rather than being last or reluctant to shift."

When Chinese-owned LSH Auto bought

the Northern region businesses from MBRG in 2013, Webb took on the role of managing director, leading the group through the first stages of the agency model transition and building the largest Mercedes dealership in Europe at Stockport.

Webb says: "The automotive industry is going through a lot of change right now."

"It's important that we remain open minded and prepare the group to be nimble enough to adapt. That's where I get my motivation from. I want to see the business thrive and face those challenges."

MBRG was often a pilot for many initiatives and, while that can be a disruption, it meant Webb was always placed at the forefront of what the OEM was trying to achieve.

Webb was attracted back to Holden after looking for an opportunity for a business where he could be "more hands-on operationally" and also be exposed to a multi-franchise business.

Holden represents Volvo, Renault, Honda, MG, Kia and Dacia.

Webb's ambition to lead a multi-franchise group happened to coincide with when Tim Holden, Holden Group's owner and now chairman, was looking to step back from leading the business day-to-day.

Holden and Webb had kept in touch over the years. A lot of Webb's family and friends are from Norwich and Norfolk.

Webb says: "So many things were aligned to bring me back to Holden."

"Tim remains ambitious in terms of his goals. That excites me. I can put the right things in place so, when they happen, we're prepared to execute."

NAVIGATING THE AGENCY MODEL TRANSITION

Webb worked closely with Mercedes-Benz ahead of its decision to roll out the agency model in January 2023.

Agency establishes a set handover fee for each car sale and the motivation for OEMs is to protect their new car margins by having

consistent pricing for their vehicles, as well as the smoothest path possible for the customer's journey online and in the showroom.

Holden had already forged ahead with agency at its three Volvo locations before Webb took over as managing director.

He says: "We spent a lot of time at Mercedes looking at the customer journey."

"Ultimately, when you flick the switch to agency, customers don't really know and mustn't feel like there's a big difference."

"You have to bring your teams with you to make sure it's a step they believe in. You have to have a management team that is committed to looking at not just the things that are working well, but also what's not working well."

"The wrong thing to do is go backwards and try to undo things on agency."

Holden's Volvo business volumes have not been negatively impacted by agency. In fact, sales volumes are up year-on-year and Webb says the group is not short on enquiries, which has also been boosted by "great products like the new EX30".

The main challenges have been more around getting used to the different customer journeys and the processes involved.


Webb says: "We're very open minded with agency and we're fully embracing it."

"There are always going to be pressure points on teams and managers when there's a change to the model."

"That's often down to the changes to system integrations with your own set of processes that we've been working with for many years."

One myth around agency Webb can bust is that the retailer has less of a direct relationship with customers.

He says: "What we've found is that customers are seeking out support and advice more than ever and we're here to help them with that."

"If anything, agency gets you to work 

harder with your approach to customer care.

"You have to give the customer a reason to buy from you other than the price."

FRANCHISED MODEL V AGENCY – IT'S NOT A FAIR COMPARISON

Some brands such as Jaguar and Stellantis have taken a step back from introducing the agency model, while others like Ford, Toyota, Honda and Volkswagen are all working on their own plans for the UK market.

Webb says these delays or rethinks with agency have shown it's not as easy as some might have first thought.

He says: "The jury is still out for some to see if they're convinced by it or not.

"You can see positive returns from both approaches. It's too early to say if one is better than the other.

"Whatever the OEM believes is the right thing to do, as a retail partner you have to be flexible enough to help them achieve their goals.

"It would be foolish for me to fight to stay within a franchised model.

"All I've got is the history of working with franchised model compared with agency, so it's not really a fair comparison at this stage."

TOUGH TASK TACKLING COST

When asked about the biggest challenge facing the industry and the group, Webb is quick to respond.

"It's cost. As retailers we're always excellent at being able to work around whatever we're given. Whether it's electrification, or changes to the retail model. We can still excel and thrive in that environment.

"One thing you have less control over is the costs involved in running a group. Whether it's interest rates, IT or cybersecurity... the list goes on." (see strategic overhauls far right).

Addressing that challenge is an exercise in efficiency. Webb has focused on the best opportunities to unlock potential as a starting point and has combined that with working to

OUR FOCUS NOW IS TO CREATE A DIGITAL JOURNEY THAT HELPS INFORM CUSTOMERS AND ENCOURAGES CONTACT

a more efficient business model.

Streamlining customer care innovations such as the Customer Care Hub exemplifies this approach.

The hub, created from scratch after nine months of work, is a dedicated support system designed to streamline customer service across all Holden Group dealerships.

The new centralised team of customer care agents will provide support for all enquiries on the phone, email and chat across all Holden brands.

The new business is initially handling inbound calls for aftersales, but Webb is excited by the potential it offers, with plans to expand to digital sales integration and customer retention.

Webb says the hub is continuing to evolve and grow and it's all on the back of improving the customer journey and what customers were telling the group.

He says: "We were mindful that service advisors were spinning many plates. We now have support in place to give customers a better experience.

"We can grow our retail hours for aftersales. That's a key objective. We've put the support there to grow the hub further."

The hub's flexible structure allows for hybrid working models, which Webb says is attracting a diverse talent pool and catering to customer needs beyond traditional working hours.

Webb says: "We can attract people who thrive in that customer care approach. We can accommodate part-time work, evenings and weekends."

CHAMPIONING ELECTRIFICATION IN EAST ANGLIA

Holden is well placed to lead the charge with electric vehicle (EV) sales, with many of its franchises featuring market-leading EVs in their portfolio.

Webb is passionate about educating customers on the benefits of EV ownership, particularly in the rural Norfolk community where scepticism can be high.

At the Royal Norfolk Show in June, Holden showcased only EVs, a bold move that reflects Webb's commitment to the future of mobility. Around 100,000 people attended the two-day event.

"We've put an EV ownership guide together called 'Electrify Your Drive,'" Webb says.

"The guide is part of a broader effort to demystify EVs and highlight their benefits, especially as more exciting models like the Kia EV3, Dacia Spring, MG Cyberster and Renault 5 come to market.

"If ever there was an area that would benefit from electrification, East Anglia is it," Webb asserts.

Webb says today's EV technology is more than suitable for trips within East Anglia and the area is quickly expanding its rapid charger infrastructure, with Gridserve opening a flagship hub just outside Norwich.

Holden is finding success with EVs when presenting the value proposition, in addition to long warranties, lower cost servicing and savings from charging.

Webb says: "Prices are coming down and there's now really healthy competition from OEMs on range, body styles and practicality."

It's been widely reported that EV retail sales are tracking behind and this is making this year's Zero Emissions Vehicle (ZEV) Mandate 22% market share target trickier to hit.

The mandate requires OEMs to sell a set share of new car sales as electric, with the 22% target in place this year and incremental increases in the years to come.

Fines will be issued for those missing their targets, although there is also a complicated credits system in place to mitigate this.

Webb says some brands are getting to that 22% figure more easily than others.

However, he says that across the board, OEMs are being proactive in relation to ZEV.

He says: "OEMs haven't walked away from how difficult it can be to achieve.

"They're supporting us with incentives, pricing and packages for customers. It wasn't there at the beginning with EVs as they were starting, but it's certainly there now."

Holden's sales teams play an important part in EV sales mix success. Their expertise

A flexible approach to attracting and retaining staff

Historically, Norfolk has found it difficult to attract new people to the automotive retail industry.

Webb has found that the more flexible you can be around hybrid working, the easier it can be to persuade new talent to make the move.

Holden was one of the first dealer groups to introduce flexible working within automotive retail sales teams more than 10 years ago.

The average length of service at Holden is 10 years and in the past 12 months, the group has promoted 12 managers internally and taken on a further 11 from outside.

Webb says: "We're going through a lot of change and we're preparing the business for future growth, so we have to be mindful of the pace.

"But I think it's healthy to have that mix of experience from within the group, as well as new perspectives from everyone when we're on this journey to embrace change and face the challenges and opportunities that are coming our way."





FACTFILE

Turnover: £119 million
Latest profit before tax: £400,000
Number of new and used car and LCV sales annually: 5,700 new and used
Number of staff: 230
Number of locations: 7
Sales franchises: 5
Additional authorised repairer franchises: 1

goes beyond the product itself and into areas like running costs, servicing, charging, taxation and home energy.

Webb says: "Everything that's in a customer's head if they're unsure or anti-EV, we can present them with convincing facts.

"Do you have time for us to explain? Fundamentally, have you driven one? We can help with that if you want to give one a chance and take a test drive."

The majority of Holden's teams are themselves driving EV products to give them first-hand experience of living with an EV.

Webb says: "It's good for staff morale for them to be in the latest vehicles, but it also has the added effect that if they get on well with an EV, they will articulate that to customers much better than if they were still running a petrol or diesel."

DIGITAL EVOLUTION AND FUTURE GROWTH

Looking ahead, Holden is developing a new website, prioritising simplicity and user experience.

"We're in the process of developing a new website. We're working with a third-party developer on that, but we've purposely not gone for an off-the-shelf solution. We want to build something ourselves alongside the

third party," Webb explains.

He emphasises the importance of blending digital advancements with the tangible showroom experience.

"We mustn't lose sight of the fact that you can come to the showroom and test a vehicle. The dealer still plays a very important part in that customer journey. Customers still want to be able to touch, feel and drive the products that they're buying, but, often, their journey starts online."

This means the new website will be built around how customers want to transact, but Webb is keen to avoid over-complication.

He says: "I think most of the online platforms are overly complicated.

"We don't want to lose sight of customers wanting to come to the showroom. The number of end-to-end digital journeys is extremely low across the industry.

"This may change with generations, but our focus now is to create a digital journey that helps inform customers and encourages contact."

Holden is testing and reviewing the new website and getting feedback before launch.

Holden's goal is to grow with long term partners, but Webb is open minded about partnering with more across East Anglia.

Strategic overhauls and investments at Holden

Upon his return, Webb initiated significant operational restructuring.

"One of the biggest things we've changed is the operational structure. We've introduced key specialist roles like head of used cars with Richard Hollis, who moved over from Cinch. Our used car opportunity has a lot of room for growth," he explains.

Additional roles such as group marketing positions, a Customer Care Hub manager, systems training manager, health and safety manager, and group Volvo buyer have been established. These roles are instrumental in laying the foundation for Holden's anticipated growth.

Investments in data insights and IT infrastructure have been paramount.

Webb adds: "We have introduced more data insights to support managers to make faster decisions and identify areas of opportunity.

"We've invested in areas that will help colleagues operate more efficiently. A new in-house, cloud-based reporting system, IT infrastructure, and group phone system have all been added in the past 12 months."

Harnessing tools like Power BI (business intelligence), the group extracts and presents data in a user-friendly manner, facilitating informed decision-making across departments.

"Data insights can be quite powerful to show what difference it will make to the group as a whole," Webb asserts.

These operational changes are in addition to other notable developments for Holden over the past 12 months, including the acquisition of a third Volvo business, marking Holden's inaugural venture into Suffolk, and significant investments in infrastructure, such as the new Kia showroom, Dacia corporate identity standards, MG showroom enhancements for the new Cyberster and taking on the Mitsubishi authorised repair franchise for Norwich.

A busy 2024 will be rounded off by the relocation of Holden's Hylton Gott Volvo business from Downham Market to a state-of-the-art EV-focused facility in Kings Lynn.

Webb notes with interest the "flood of new manufacturers coming to the UK" and that there are big investments happening on the OEM and dealer network side in establishing these new brands.

Webb adds: "We haven't committed to a specific number of locations across East Anglia, but we remain open to any opportunity that may come along."

A report to complement the findings of the AM100

Another calendar year is nearly completed, one that has brought both challenges and opportunities. For those in the sector, November can only mean one thing: Automotive Management Live is just around the corner, and there's another edition of the AM100 for us to sink our teeth into.

Reputation is delighted to be sponsoring the AM100 once again for 2024. The AM100 recognises the top 100 dealer groups by revenue, but of course, there's so much more to it than annual revenue. Revenue is maintained and grown when everyone within a business is working towards the same target, and when total focus on the customer is a key goal for all stakeholders.

On behalf of Reputation, we'd like to congratulate the entire AM100 on such a fantastic achievement.

Reputation's Automotive Report 2024-25

As well as the AM100, there's a second content and research release which generates headlines in the sector around this time of year; Reputation's annual European Automotive Report, which you can grab a copy of at AM Live, released earlier this month.

Whereas the AM100 ranks based on turnover, Reputation's Auto Report looks at Reputation Score. Reputation Score is a widely-recognised, vital performance metric for dealerships and OEMs globally. It provides marketing leaders with a measurable indicator of overall brand health, while offering dealership managers actionable insights through detailed customer feedback. When combined, the two reports offer a detailed overview of the sector's performance.

We believe Reputation's European Automotive Report is one of the most important reports you'll read this year.

What sets Reputation's report apart is its access to the industry's largest location-based dataset of consumer reviews, analysed using AI-powered natural language processing. Readers will discover which of the leading OEMs and dealers are most effectively leveraging their reputations to drive their boom lines.

Stay informed and stay ahead – read on for insights that could transform the performance of your automotive business.



New for 2024-25, Reputation's Data Science team analysed and included the entire AM100 in its rankings for Dealer Groups, although regular readers of the report know there are also rankings for both Dealerships and OEMs. Below you will find each category's top three:

OEMs

1. Dacia
2. Renault
3. Hyundai

Dealer Groups

1. Howards Motor Group
2. SG Petch
3. Renault Retail Group

Dealerships

1. Porsche Centre Teeside
2. Gravells Kia
3. Lloyd Kia

Congratulations to all! So, what have these groups done over the past year to rank so highly?

A Customer-First Mindset

The automotive sector is perhaps second only to hospitality when it comes to truly appreciating the importance that customer feedback, customer experience (CX), and a customer-first mindset really



has in today's economy. However, that is a debate for another day!

Consumers have more choice than ever, and so it is mission-critical that a focus is placed on the consumer across all areas of your brand. A customer-first future is, in reality, not that far away in the sector.

We at Reputation are already helping approximately 30 of the AM100 with their CX and feedback strategies, to help dig into the sentiment behind the feedback, and take action from it to improve.

Consumers often know what they want when they reach out to a dealership, and they know how they want the sales process to be handled – on their terms.

There are many touchpoints along the customer journey which are different even compared with just a few years ago.

Reputation Report European Automotive Industry 2024-25

The Reputation Solution
Automotive uses the Reputation Solution to
enhance customer experience, improve
brand perception, and drive growth.

UK: Top 100 Dealer Groups*

Rank	Group	Reputation Score	Satisfaction	Trust	Engagement
1	Peugeot Motor Group	88.0	92	79	88
2	MG Group	87.5	86	76	84
3	Renault Group	87.0	85	76	81
4	Vauxhall Group	79.8	83	77	87
5	BMW Group	79.8	80	77	88
6	TOYOTA	79.0	84	75	86
7	Audi Motor Group	78.8	81	76	86
8	Mercedes-Benz Group	78.4	81	75	86
9	Volvo Group	78.0	81	77	87
10	Proton	77.9	80	75	84
11	Wolfsburg Group	77.7	76	77	86
12	Wolvo Group	77.6	80	76	86
13	Jeep Group	76.1	76	76	87
14	Vauxhall	75.3	76	76	78
15	Lotus	75.3	76	76	78
16	Vauxhall	75.0	77	75	87
17	Mercedes-Benz Group (UK and Ireland brands)	75.0	76	75	78
18	Toyota	74.7	83	84	78
19	Land Rover	74.4	81	87	78
20	BMW Group	74.0	75	77	84

KIA
754% increase in brand awareness
4.2% increase in market share

Renault
4.8/5 Customer Satisfaction

The Reputation Solution
Automotive uses the Reputation Solution to
enhance customer experience, improve
brand perception, and drive growth.

Key Benefits:
- Increase brand awareness and customer loyalty
- Improve customer satisfaction and retention
- Drive growth and revenue
- Enhance brand perception and reputation

We've seen the rise of online-only brands, and the disruption that the pandemic brought the sector.

However, out of the ashes has risen a new customer journey, one that embraces multiple touchpoints along a wide range of channels – on and offline – to enable a buyer to purchase on their terms.

This new customer journey exposes a buyer to a wealth of information: it could be online reviews, a brand's own marketing, online videos, social media content, sales, discounts, and more.

And this is where it can get tricky, as without a complete view of what is being said online, and without a true focus on getting this right, you can quickly fall behind.



AM AWARDS: 2025

STAKE YOUR CLAIM AT THE 2025 AM AWARDS

The 2025 AM Awards are now open for entries



Entering Automotive Management's AM Awards presents a strategic opportunity for UK car dealerships to gain recognition, enhance brand credibility and engage with industry leaders.

Winning or even being shortlisted in categories such as Dealership of the Year, Community Hero or Online Consumer Experience offers dealerships a unique promotional boost, helping them to stand out in a competitive market.

Past winners report that the award showcases their commitment to excellence in customer service, digital innovation and team achievements, drawing both customers and skilled employees who are motivated to work for recognised leaders in the automotive field.

The AM Awards Dinner, on May 1, 2025 in London, also opens valuable networking channels, providing dealerships with access to other high-performing

industry players, from suppliers to OEMs, and enhances professional visibility.

Participating in the AM Awards supports continuous improvement, as the preparation of entry submissions encourages dealerships to evaluate their practices and refine strategies, particularly in emerging areas such as electric vehicle sales and sustainability initiatives. For dealerships aiming to position themselves as market leaders, entering the AM Awards is more than a celebration; it's a mark of trust that can attract customers, retain talent and build long-term industry relationships

In addition to boosting recognition and credibility, entering the AM Awards enables dealerships to benchmark their performance against some of the best in the industry. The companies that make it through the judging to the shortlist of finalists showcase their dedication to quality, innovation and customer satisfaction, which appeals to a consumer base that values trusted, reputable

service providers in the automotive space.

A critical advantage of the AM Awards lies in its role in talent attraction and retention.

Dealerships that achieve an award or shortlisted status are more appealing to potential employees, as the recognition serves as a testament to an organisation's commitment to excellence and professional growth. Dealer groups such as Marshall, TrustFord and Waylands have leveraged their AM Award wins to attract top-tier talent, boosting team morale and ensuring that motivated staff serve their customers to their best abilities.

The event itself is also a networking hub, bringing together dealer group executives, suppliers and manufacturers, to create opportunities for sharing insights and discussing mutual opportunities.

By entering the AM Awards, dealerships not only earn industry accolades, but also foster an internal culture of continuous improvement and resilience, helping them adapt to shifting market demands.



AWARDS 2025 TIMELINE

NOVEMBER 13, 2024
Open for entries – visit www.am-awards.co.uk

JANUARY 31, 2025
Deadline for entries

END OF FEBRUARY, 2025
Awards judging

MID-MARCH, 2025
Shortlist revealed at am-online.com

MAY 1, 2025
Winners revealed at AM Awards black-tie ceremony, Park Plaza Westminster, London



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AM-AWARDS.CO.UK

TURN OVER FOR CATEGORIES AVAILABLE TO ENTER



Sponsored by



CATEGORIES AVAILABLE TO ENTER

The Community Hero Award

Sponsored by Autoglym

We want to recognise dealerships that are deeply rooted in their communities, support local causes and organisations, and have a culture of giving something back. Open to car and LCV dealers, including franchised and independents.

Marketing Strategy of the Year

Marketing should help you to build your brand as well as to find new customers and help you to grow sales in the short term. Open to dealers of cars or LCVs, whether independent or franchised, and vehicle manufacturers.

Online Consumer Experience of the Year – Franchised Dealer

Dealers entering this award category should provide an excellent, comprehensive, customer-focused digital experience for consumers who are searching online for their next car, whether new or used.

Online Consumer Experience of the Year – Independent Dealer

Dealers who enter this award category should provide an excellent, comprehensive, customer-focused digital experience for consumers who are searching online for their next car, whether new or used.

Leader in Diversity and Inclusion

Bringing diversity and inclusion together provides a holistic opportunity to recognise and honour the companies that are looking after their staff in the best possible way by being an inclusive employer creating an open, respectful and equitable workplace. Open to franchised and independent car and van retailers.

Workshop of the Year – Independent & Franchised

Sponsored by SecretService

The workshop is a critical source of profitability and customer contact. This award seeks to recognise a superb, outstanding service site. Open to both independent and franchised workshops.

Best in Customer Service

Sponsored by LTK Consultants

Entrants should have a customer-centric culture and take pride in strong satisfaction scores, but never allow complacency and react robustly to fix the situation whenever things go wrong. Entries accepted from franchised and independent car and LCV dealers.

Customer Service Champion (NEW)

This award is for an individual who works within a franchised or independent car or LCV retailer, in

any customer-facing role or department. Entrants may self-nominate or may be put forward by colleagues or managers. The judges expect to see individuals who clearly and consistently show that they go the extra mile to deliver the highest level of customer service and who stand out for their ability to listen, empathise and adapt.

EV Advocate of the Year

Open to both dealers and OEMs, this award requires businesses to demonstrate how they have gone the extra mile to support the use of electric vehicles (EVs). Entrants will have a passionate and knowledgeable workforce that advocates for EVs.

EV Performance of the Year

Outlets that are high performing in EV sales should enter this category, demonstrating their ability to develop a strong local market. Open to franchised and independent car or LCV dealers.

The Sustainability Award

This category is looking for the best motor retailers and carmakers which can demonstrate strategic planning and robust steps being taken to help build a more sustainable and better future.

Franchised Dealership of the Year

This category is open to single-site owner operators and to best performing dealerships within a larger group network – both single franchised and multi-franchised showrooms.

Independent Dealer of the Year

Sponsored by Visitor Chat

This award is open to any independent (non-franchised) dealer that sells used cars and is intended to recognise the broad success across the group from its focus on used cars.

Used Car Performance of the Year

This award is open to any company or group that sells used cars and is intended to recognise those who have turned the practice into an art form and a hugely successful and profitable business.

Dealer Principal/General Manager of the Year

The winner will be a dealer principal or general manager who has done incredible things with difficult brands or marketplaces by demonstrating excellent leadership skills, drive and innovative thinking that has helped the dealership achieve business objectives.

Dealer Group of the Year (up to 10 sites)*

The motor retail industry is made up primarily of smaller, regional groups. This award category is designed to recognise and honour those companies. Entrants will be able to show how

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AM-AWARDS.CO.UK

they meet the AM Awards' original criteria of quality, innovation and service and how they have tracked their performance improvement over the past five years.

Dealer Group of the Year (more than 10 sites)*

This award recognises the unique complications and complexities that come from co-ordinating a large retail group, one with more than 10 dealerships. Entrants will be able to show how they meet the AM Awards' original criteria of quality, innovation and service, and how they have tracked their performance improvement over the past five years.

Best New Product or Service (supplier category)

Open to industry suppliers that are helping to change dealers' fortunes. We expect to see innovation and measurable results, including examples of beneficial use by your customers. Products or services must have been launched since January 2024.

Supplier of the Year

Open to submissions from industry suppliers.

AM AWARDS AUDITORS

Continuing in their role as AM Awards auditors will be the specialist automotive team at Cooper Parry (formerly UHY Hacker Young Manchester) led by David Kendrick, Ian McMahon and Paul Daly. AM is delighted to engage such expertise, which is vital in verifying entries and helping the judging panel to decide the strongest contenders in our headline dealer group categories.

COOPER PARRY



New research confirms aftersales customers want to hear about value-add products and services

Tjekvik, a specialist in digital aftersales solutions, recently commissioned a survey to gauge perceptions of key aftersales issues and found that almost three-quarters (72%) of the 1,000 drivers polled were "interested in hearing from their dealer about additional products and services relevant to them when they have their vehicle serviced".

As well as highlighting receptiveness to being cross-sold, the survey explored which products and services might be of most interest. Coming top are service plans, with 39% of respondents saying they would be happy to hear more about them when checking their vehicle in for service, repair or MOT.

Other products and services that customers want to hear about include seasonal summer or winter check-ups (cited by 34%), oil top-ups (28%), extended warranty packages (26%), an air conditioning re-gas (25%), windscreen wiper blades (25%), car care products (20%), and replacement key fob batteries (16%).

The survey also uncovered variations across different age groups and regions. Younger drivers aged between 18-24



showed the highest level of interest in being upsold additional products and services, with 60% answering that they were "very interested". Older drivers aged 65 and over were the least interested, with a minority of 45% stating they were either "not very interested" or "not interested at all".

Geographically, dealerships in Northern Ireland have the most receptive customers, with 92% of respondents from

the region indicating an interest in hearing about additional products and services. This was followed closely by London (87%) and the North-West (73%).

Christian Mark, CEO and Co-Founder at Tjekvik, said: "Franchised dealers have always had to compete with independent garages for custom, sometimes sacrificing margins to do so. In this context, it is increasingly important to find legitimate ways to maximise profit per transaction. One of the key methods is through the upselling of traditional value-add products and services, such as service plans, extended warranty packages, and seasonal vehicle checks.

"These results show there is a clear demand for additional products and services among aftersales customers. This presents a valuable opportunity for dealerships to enhance customer satisfaction and increase revenue by offering relevant add-ons when customers arrive to check in their vehicles for servicing or repair. With our digital tools in place, dealers can better identify customer needs and provide targeted upsell opportunities, making the aftersales process more seamless and personalised."



Visit: www.tjekvik.com or contact Darren Bentley on +44 7470 214847 or darren.bentley@tjekvik.com

tjekvik

Rank (2023)		Name	T/O 2024 (£,000)	T/O 2023 (£,000)	Outlets 2024	Outlets 2023	Staff 2024	Staff 2023
1	(1)	Sytner	7,935,958	6,833,708	156	140	10,633	10,188
2	(5)	Lithia UK	6,208,564	3,620,000	187	137	8,343	n/a
3	(2)	Arnold Clark Automobiles	4,964,800	4,921,600	195	185	11,694	11,400
4	(4)	Vertu Motors	4,719,587	4,014,544	204	195	7,441	6,719
5	(3)	Global Auto Holdings (aka Lookers)	4,598,400	4,300,900	160	159	6,724	6,658
6	(7)	Group 1 Automotive UK	4,167,807	2,244,623	150	82	6,618	3,409
7	(6)	Marshall Motor Group	3,732,369	3,200,000	152	155	5,288	5,356
8	(8)	TrustFord	1,880,408	1,721,631	40	40	2,706	2,670
9	(16)	Greenhouse Group	1,494,132	1,118,443	10	7	1,473	1,307
10	(10)	JCT600	1,414,434	1,450,119	49	45	2,133	2,199
11	(14)	Stoneacre Motor Group	1,356,554	1,176,954	123	108	2,796	2,492
12	(12)	Listers	1,290,219	1,236,595	52	51	2,041	2,044
13	(15)	Motus UK (incl. Pentagon Group)	1,278,875	1,123,229	46	42	2,806	2,838
14	(13)	PSA Retail UK	1,218,742	1,170,105	68	53	1,215	1,215
15	(20)	John Clark Motor Group	1,029,873	914,285	39	36	1,355	1,304
16	(21)	Park's Motor Group	1,011,710	865,197	68	67	2,114	1,907
17	(17)	Hendy Group	1,004,002	931,801	69	74	1,690	1,690
18	(22)	Swansway Garages	941,069	819,438	22	21	1,154	1,074
19	(24)	Johnsons Cars	935,027	808,214	52	53	1,337	1,337
20	(19)	Hedin Automotive UK	935,000	961,262	17	17	1,691	1,691
21	(26)	Lloyd Motors	870,985	748,252	26	27	1,168	1,082
22	(23)	Eastern Western Motor Group	859,386	810,940	43	33	1,461	1,442
23	(27)	Steven Eagell	840,675	702,721	44	44	1,181	1,077
24	(25)	Dick Lovett Group	822,064	769,763	17	17	964	909
25	(30)	Perrys Group	794,154	643,019	48	51	1,387	1,487

**TOP 100
TABLE**

Rank (2023)	Name	T/O 2024 (£,000)	T/O 2023 (£,000)	Outlets 2024	Outlets 2023	Staff 2024	Staff 2023
26	(28) RRG Group and Norton Way Motors	787,192	685,203	32	34	1,194	1,123
27	(29) TG Holdcroft	750,289	659,939	30	28	651	617
28	(39) Allen Ford (Supergroup UK)	725,290	530,477	39	40	1,293	1,163
29	(35) Sinclair Group	637,851	559,515	25	25	764	777
30	(31) Harwoods Group	636,303	581,186	20	20	1,029	1,029
31	(34) Cambria Automobiles	615,634	566,166	28	28	628	618
32	(32) Peter Vardy	590,518	560,690	7	9	1,008	1,008
33	(33) Snows Motor Group	582,834	489,665	53	55	1,045	1,045
34	(38) HR Owen	567,128	536,229	21	21	489	460
35	(40) Glyn Hopkin	560,560	520,692	36	40	835	820
36	(36) AWR Holdings UK	551,905	540,000	29	27	656	751
37	(37) Williams Motor Company	543,886	536,267	13	13	773	750
38	(50) Yeomans	528,257	318,763	38	33	784	627
39	(49) Porsche Retail Group	518,424	320,139	5	5	338	282
40	(42) Renault Retail Group	453,255	390,272	33	30	508	549
41	(44) Vindis Group	436,055	378,243	16	17	775	767
42	(45) Citygate Group	424,018	362,447	21	20	623	609
43	(43) Marsh Wall	412,999	383,156	9	9	512	487
44	(41) Halliwell Jones Group	409,823	413,257	12	10	575	549
45	(48) Hatfields	378,616	325,231	7	8	390	382
46	(53) Richmond Cars	377,299	306,434	15	15	467	444
47	(70) City West Country	368,236	245,056	15	9	693	605
48	(47) TC Harrison Group	365,555	326,897	16	16	546	518
49	(18) Ryland Automotive	350,000	985,969	14	31	n/a	1,028
50	(67) DM Keith	348,000	248,019	20	16	448	425

Rank (2023)		Name	T/O 2024 (£,000)	T/O 2023 (£,000)	Outlets 2024	Outlets 2023	Staff 2024	Staff 2023
51	(51)	Mon Motors	341,995	315,418	24	12	674	639
52	(52)	Jemca Car Group	314,884	314,884	11	11	449	449
53	(58)	Sandiccliffe Motor Group	312,673	268,953	14	14	437	416
54	(56)	Drive Motor Retail	311,214	279,777	25	23	650	692
55	(54)	VT Holdings	311,048	291,513	19	18	308	461
56	(57)	Peoples	306,766	275,662	12	9	356	363
57	(73)	Toomeys	306,176	240,247	21	18	412	397
58	(66)	Brindley Garages Group	304,796	249,080	13	13	302	264
59	(55)	Bowker Motor Group	303,449	284,254	6	6	853	812
60	(61)	CEM Day	284,855	257,577	7	10	570	562
61	(63)	Donnelly Bros Garages (Dungannon)	283,633	252,338	26	26	512	504
62	(72)	Chorley Group	281,436	240,257	21	16	362	336
63	(60)	Barretts of Canterbury	276,457	261,383	7	9	472	467
64	(59)	Eden Motor Group	275,878	268,828	21	23	664	658
65	(77)	Vantage Motor Group	272,217	224,105	13	13	425	381
66	(64)	Vospers	270,286	252,081	33	30	601	588
67	(71)	Endeavour Automotive Group	269,260	240,714	18	18	404	366
68	(68)	Thurlow Nunn	267,764	246,094	14	12	630	627
69	(65)	Caffyns	262,084	251,426	18	17	414	402
70	(75)	JCB Group	256,782	228,184	28	24	304	297
71	(46)	LSH Auto UK	255,944	327,444	15	12	604	603
72	(81)	Riverside Motors Group	252,159	209,924	8	7	253	220
73	(74)	Hartwell	250,437	230,348	21	13	341	366
74	(82)	Fish Brothers	248,492	205,117	11	12	311	317
75	(90)	Ancaster Group	242,589	179,283	14	22	377	354

Rank (2023)		Name	T/O 2024 (£,000)	T/O 2023 (£,000)	Outlets 2024	Outlets 2023	Staff 2024	Staff 2023
76	(79)	Cotswold Motor Group	235,862	214,631	5	5	343	333
77	(80)	Partridge of Hampshire	228,738	212,141	2	2	157	165
78	(87)	Parkway Derby	227,976	184,570	6	6	330	315
79	(69)	William Morgan Group	225,275	245,729	6	6	331	335
80	(89)	Heritage Automotive	218,311	179,286	15	25	357	323
81	(84)	Gates Group	211,440	197,579	9	9	302	314
82	(83)	SG Petch	211,135	203,940	21	26	318	303
83	(78)	Vines Group	201,848	218,689	7	7	304	300
84	(95)	Waylands Automotive	200,870	168,407	11	10	248	211
85	(86)	John Grose Group	199,815	187,840	9	8	306	309
86	(92)	Howards Group	198,769	174,855	20	22	263	242
87	(91)	Marriott Motor Group	197,492	178,212	10	9	356	374
88	(62)	BMW Retail (Park Lane)	196,701	254,145	2	2	209	217
89	(96)	Cars2	191,562	168,021	17	13	239	211
90	(88)	Arbury	188,833	183,832	14	14	288	293
91	(New)	Ray Chapman Motors	180,436	129,285	4	2	240	122
92	(100)	Drift Bridge Group	175,557	135,075	4	4	263	248
93	(76)	Sandown Motors	175,511	224,670	15	11	548	530
94	(85)	Foray Motor Group	174,252	197,460	7	7	404	399
95	(94)	Burrows Motor Group	168,943	171,952	8	8	352	342
96	(97)	Central Garage Uppingham	167,302	150,298	11	12	301	260
97	(New)	Worcester Carsales	163,870	132,811	15	15	349	303
98	(New)	HSF Group	158,031	139,771	6	6	158	165
99	(New)	FRF South Wales	156,659	97,043	8	5	282	206
100	(New)	WR Davies	148,320	127,089	15	14	260	247



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Introducing the tools to make customer service more rewarding for your business as well as your customers

At Connectivity.CX we are unrivalled in bringing a first class guest experience to your customers across all points of contact. Our data driven approach not only means we engage with existing customers at salient times in the product life cycle, but also helps you identify the profitability of specific areas of your business. Such is the effectiveness of our strategic communications strategies that they often end up paying for themselves.

To find out more about our range of products and services, come and visit us at AM Live or give us a call today on 0161 850 3261 to arrange a meeting.

- **EVHC Follow-up** An omni-channel staged reminder program that delivers outstanding ROI.
- **Trusted Voice Caller ID** Displays your business name and logo when you call and in the missed calls list.
- **Catalyst for Aftersales** Data driven approach that identifies and actions key touch points throughout the vehicle ownership life-cycle.
- **Customer Experience Management** Ensuring every customer contact is a positive experience. Increases customer loyalty and brand reputation.
- **Inbound Sales & Aftersales Enquiries** An unrivalled team that can handle enquiries across all channels, even outside of regular business hours.
- **AI Transcription & Call Coaching** A near real-time transcription of every call, helping you to ensure that your team is always performing at their best.
- **Outbound Sales & Aftersales Campaigns** Omni-channel campaigns with detailed analytics reporting.
- **SMS Engagement Campaigns** Achieve open rates as high 98% with our SMS campaigns.



CONNECTIVITY.CX
a more rewarding customer experience

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A More Rewarding Customer Experience

In an age when consumer choice has never been more abundant, delivering a more rewarding customer experience is increasingly the differentiator between getting the sale or losing it.

Premium brands have long invested in delivering a customer experience that lasts as long as the customer owns the vehicle.

The team at Connectivity.CX has taken this philosophy a step further by creating a suite of products that enhances the customer experience throughout the ownership lifecycle, and delivers enviable return on investment (ROI) for the businesses using them.

Trusted Voice

More than 80% of businesses still use the telephone as their main form of customer contact. Despite being the favoured media channel of consumers, nearly nine-out-of-10 people ignore numbers they don't recognise. Connectivity.CX's Trusted Voice caller ID technology displays your business name and logo so customers know it's you who is calling them. If a call does go to voicemail then your logo is displayed in the missed calls list,

increasing the chances of customers calling you back. Trusted Voice helps businesses achieve a first-time connection rate of 60%-75%. That's around 25-35 more conversations for every 100 dials made.

"The benefits of Trusted Voice are felt immediately regardless of the size of the dealership," said Andrew Dent, Operations Director at Connectivity.CX. "For service departments, getting hold of customers on the first attempt smoothes the flow of work through the workshop. For sales enquiries, the time to completed sale is



reduced. Our monthly detailed reporting demonstrates the ROI and that Trusted Voice more than pays for itself."

Electronic Vehicle Health Check Follow-up

You may have heard about Nudge theory:

making small changes that significantly influence people's thinking or behaviour.

The Connectivity.CX Vehicle Health Check Follow-Up programme adopts this principle to provide regular, gentle reminders that increase in urgency as more time passes from the initial health check.

It's a proven way to remind customers that potentially serious safety issues need addressing, without coming across as pushy.

Rather than solely relying on automated emails, Connectivity.CX deploys the full suite of

communication channels for follow-up contact. The results are more than impressive. Typically, more than 30% of follow-up contacts result in a booking, with 85% of these converted to an invoice. That equates to an ROI of 844%.

Virtual Assistant

The days of nine-to-five business hours are long gone. The advent of the smartphone means your customers can browse, shop and book whenever and wherever they choose to. Virtual Assistant is an AI chatbot that can continue a conversation across multiple days to complete sales, aftersales or service bookings anytime of the day or night.

"There's nothing more frustrating for customers than having to start explaining themselves from the beginning if they contact a business for the second or third time," explained Allistair Carmichael, Managing Director at Connectivity.CX.

"Virtual Assistant seamlessly picks up from their last contact. We don't try to hide the fact that it's a virtual assistant, but customers interact in the same way as they do with a human team member.

"It's that good."



To find out more about these and the full range of Connectivity.CX products and services visit www.connectivity.cx or call 0161 850 3261

How to reduce your logistics costs and increase stock turn with Jigcar

Gain an edge by optimising your multi-site logistics and the location of your stock to increase speed of sale and margins

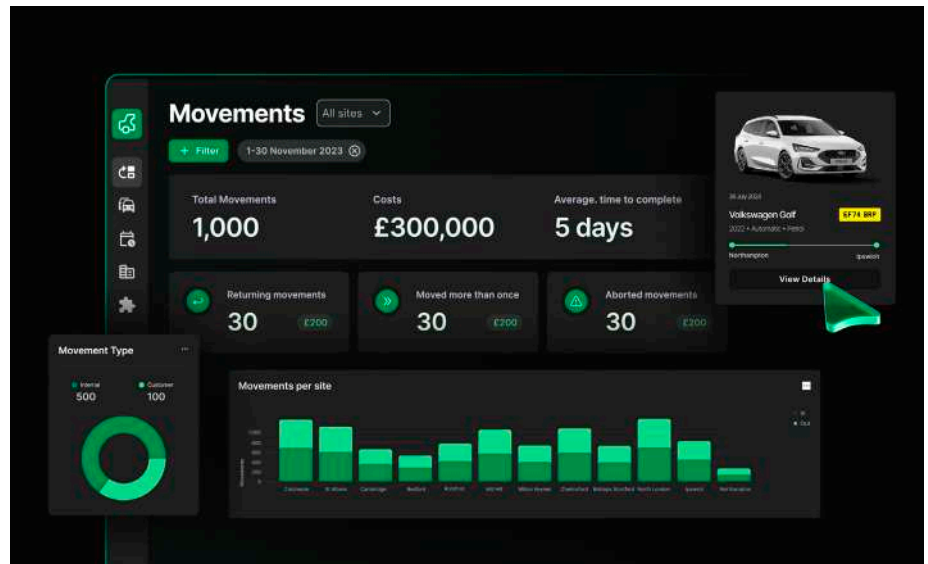
Staying ahead in today's cost-pressurised environment, means optimising every aspect of the dealer group, including logistics and stock location.

For large, multi-site groups, the potential cost and efficiency impacts of not managing stock location and logistics properly, can be huge. Conversely, the benefits of optimising both effectively, can be transformational.

Enter Jigcar, which transforms how multi-site dealer groups manage their logistics operations. By optimising stock placement across all your locations, Jigcar increases stock turn and margin at the group level, and by surfacing inefficiencies enables the opportunity to reduce wasted spend too.

Although only launched earlier this year, Jigcar is already making a substantial impact. The platform is quickly becoming the go-to solution for the top 50 UK dealers, with partnerships already established with respected franchise groups such as Glyn Hopkin, Steven Eagell and Perrys Motor Group. These early adopters are experiencing the real-world benefits Jigcar brings to their operations.

Jigcar leverages the power of artificial



intelligence (AI) to manage logistics across all of your sites, making it easy to coordinate between internal drivers, trucks and third-party logistics providers. Accessible through both web and mobile applications, this technology provides invaluable insights into cost efficiencies and logistics performance.

Whether you're seeking to streamline your current process or develop a fully optimised group-level logistics strategy,

Jigcar offers the tools to make it happen.

A solid logistics strategy is essential to support a successful omnichannel sales model. Jigcar offers the flexibility to support logistics operations, whether they are fully outsourced, managed in-house, or a hybrid approach. The platform provides the control and insights needed to keep your business agile and responsive in a fast-moving market.

Ready to cut your logistics costs and boost your stock turnover? Jigcar is the answer for dealer groups looking to optimise operations and enhance profitability. Don't miss out on the opportunity to transform your logistics strategy with a solution already trusted by some of the biggest names in the UK automotive industry. Try Jigcar today and experience the future of logistics management.



"It has truly revolutionised our logistics management, leading to smoother operations and greater collaboration within our motor group."

- Dean Quay, Sales Operations Director **Glyn Hopkin** 30

10k+ moves planned
300+ unnecessary moves stopped each month
-50% manual work saved

To find out more and book a demo, visit <https://www.jigcar.com/>



A**Allen Ford (Supergroup UK)**

Outlets: 39

Franchises: Ford 17 Ford LCV 8 Hy 3 Kia 6 Om 3 Suz 2

Key executives: Niall Hooper, chief executive; Richard Arnold, chief operations officer

Ancaster Group

Outlets: 14

Franchises: Dac 1 Gen 1 Hy 3 MG 2 Nis 6 Ren 1

Key executives: Stephen Wood, MD; Simon Hill, operations director; Robert Smith, aftersales director

Arbury

Outlets: 14

Franchises: Ab 1 Cup 1 Fiat 1 Nis 2 Pe 6 Seat 2 Ško 1

Key executives: Ben Archer, MD; Stephen Drew, finance director; Scott Stening, director

Arnold Clark Automobiles

Outlets: 195

Franchises: Ab 8 AR 5 Alp 1 BMW 5 BYD 5 Cit 7 Cup 2 Dac 15 DS 3 Fiat 18 Gen 1 GWM 2 Hon 1 Hy 6 Om 3 Jeep 5 Kia 12 Maz 5 MB 5 MG 14 Mini 4 Pe 10 Ren 15 Seat 6 Ško 2 Sm 1 Vaux 23 VW 8 Vo 2 Other 1

Key executives: Eddie Hawthorne, chief executive and group MD; Russell Borrie, chief operating officer; John Clark, chief commercial officer; Lady Philomena Clark, chairwoman

AWR Holdings UK

Outlets: 29

Franchises: Dac 1 Hon 10 Hy 1 Kia 4 Maz 2 Nis 9 Ren 1 Suz 1

Key executive: Paul Brayley, chief executive, Brayleys

B**Barretts of Canterbury**

Outlets: 7

Franchises: BMW 2 Hon 1 Jag 1 LR 1 Mini 2

Key executive: Paul Barrett, MD

BMW Retail (Park Lane)

Outlets: 2

Franchises: BMW 1 Mini 1

Key executives: Michelle Roberts, MD; Tomas Ribes, chief financial officer

Bowker Motor Group

Outlets: 6

Franchises: BMW 2 Mini 2 Pol 1 Other 1

Key executives: Paul Bowker, chief executive; Ben Gornall, finance director; Anthony Bowker, director

Brindley Garages Group

Outlets: 13

Franchises: Hon 3 Hy 2 Kia 2 Maz 1 MG 2 Om 1 Vo 1 Other 1

Key executives: Che Watson, chairman; Paul Ashcroft, finance director

Burrows Motor Group

Outlets: 8

Franchises: Kia 1 Maz 2 Toy 5

Key executives: Steve Burrows, MD; Dean Cooper, operations director

C**Caffyns**

Outlets: 18

Franchises: Au 3 Cup 1 Lo 2 MG 1 Seat 1 Ško 3 Vaux 1 VW 4 Vo 2

Key executives: Simon Caffyn, chief executive; Michael Warren, finance director; Sarah Caffyn, company secretary; Richard Wright, chairman

Cambria Automobiles

Outlets: 28

Franchises: AM 4 Ben 2 In 2 Jag 4 Lamb 2 LR 2 Maz 3 Ford 1 MG 2 Om 3 RR 1 Others 2

Key executives: Mark Lavery, chief executive; Tim Duckers, MD; Richard Hubbard, director; Natalie Boon, HR director

Cars2

Outlets: 17

Franchises: Dac 3 Hy 3 MG 3 Nis 2 Om 1 Ren 3 Seat 2

Key executives: Allan Otley, MD; Lindsay Collier, finance director; Jeremy Bates, business development director

CEM Day

Outlets: 7

Franchises: Fiat 1 Ford 2 Ford LCV 1 In 1 Pe 2

Key executives: Graham Day, chairman; Russell Day, MD; Jill Day, director; Grant Matthews, finance director

Central Garage Uppingham

Outlets: 11

Franchises: BMW 1 Kia 2 Maz 3 MG 1 Mini 1 Vo 1 Others 2

Key executives: Samantha Hamblin, chair; Graham Wemyss, MD; James Morris, group operations manager

Chorley Group

Outlets: 21

Franchises: Cit 4 GWM 1 Hy 2 Isu 1 Kia 1 MG 3 Nis 5 Pe 3 Vaux 1

Key executives: Adam Turner, MD; Andrew Turner, chairman; Stacey Turner, legal director

City West Country

Outlets: 15

Franchises: BYD 3 GWM 3 MB Car 4 MB LCV 4 Sm 1

Key executives: Anthony Wickens, chairman; Mike Wickens, MD

Citygate Group

Outlets: 21

Franchises: Cup 3 GWM 1 Kia 3 Seat 3 Ško 3 VW 5 VW LCV 3

Key executives: Jonathan Smith, chief executive; Simon McLaughlin, MD

Cotswold Motor Group

Outlets: 5

Franchises: BMW 2 Mini 2 Other 1

Key executives: Andrew Hulcoop, MD; Paul Neale, MD

D**Dick Lovett Group**

Outlets: 17

Franchises: AM 1 BMW 4 Fer 1 Jag 1 LR 1 Mini 4 Pol 4 Other 1

Key executives: Peter Lovett, chairman; Lynn Campbell, MD; Julian Winterburn, finance director

DM Keith

Outlets: 20

Franchises: BYD 4 Cup 1 Ford 2 Ford LCV 1 Hon 1 Kia 2 Seat 2 Ško 7

Key executives: Dougal Keith, MD; Angus Keith, director; Martin Nield, chief operating officer

Donnelly Bros Garages (Dungannon)

Outlets: 26

Franchises: Abar 1 AR 1 Cit 2 Dac 2 Fiat 1 Fiat LCV 1 Hon 2 Jag 1 LR 1

Peu 2 Ren 2 Seat 1 Suz 1 Toy 1 Vaux 1 Vaux LCV 1 VW 2 VW LCV 3

Key executives: Terence Donnelly, executive chair; Raymond Donnelly, director; Dave Sheeran, MD

Drift Bridge Group

Outlets: 4

Franchises: Au 1 Hon 1 Maz 1 VW 1

Key executives: John Frost, chairman; Philip Cue, MD

Drive Motor Retail

Outlets: 25

Franchises: Cit 1 Hy 3 MG 8 Pe 1 Vaux 12

Key executives: Richard Manning, chairman; Stephen Bessex, chairman; Stuart Harrison, MD; Rob Keenan, MD

E**Eastern Western Motor Group**

Outlets: 43

Franchises: BMW 2 Hon 5 Lex 3 Maz 2 MB Car 4 MB LCV 3 Mini 2

Nis 6 Sm 1 Toy 6 VW 4 Others 5

Key executives: Douglas Brown, chairman and chief executive; Nasser Mohammed, group financial director; Keith Duncan, group MD

Eden Motor Group

Outlets: 21

Franchises: Hy 5 Maz 3 MG 2 Pe 1 Vaux 10

Key executives: Graeme Potts, chief executive; Stephen Belcher, finance director

Endeavour Automotive Group

Outlets: 18

Franchises: Hy 6 In 2 Lo 1 Om 1 Pol 2 Vo 6

Key executives: Andrew Shackleton, chief executive; Andy Gore, MD; Alex Murkett, finance director

F**Fish Brothers**

Outlets: 11

Franchises: Cup 1 Dac 1 Hon 1 Kia 1 Lex 1 Nis 1 Ren 1 Seat 1 Ško 1 Toy 1 VW LCV 1

Key executives: Mike Fish, joint MD; Tim Fish, joint MD; Gregory Hughes, finance director; Jon Fish, director

Foray Motor Group

Outlets: 7

Franchises: Ford 4 Ford LCV 3

Key executives: Simon Moulton, MD; Chris Yoxon, director; Katie Massarella, finance director

FRF South Wales

Outlets: 8

Franchises: Lex 1 Toy 6 Vo 1

Key executives: Mark Radcliffe, MD; John Radcliffe, director; Tom Radcliffe, operations director; Stuart Rees, finance director

G**Gates Group**

Outlets: 9

Franchises: Ford 5 Ford LCV 4

Key executives: Heath Greenall, MD; Phil Benson, finance director; Suzanne Greenall, director

Global Auto Holdings (aka Lookers)

Outlets: 160

Franchises: AM 1 Au 12 BMW 3 Bn 1 BYD 3 Cit 1 Cup 2 Dac 7 DS 1 Fe 1 Ford 9 Ford LCV 6 GWM 3 Hy 1 Jag 4 Jeep 1 Kia 5 Lo 1 LR 10 Lex 1 MG 1 Mas 1 MB Car 13 Mini 3 Nis 9 Pe 1 Ren 7 Seat 2 Ško 3 Sm 13 Toy 3 Vaux 9 VW 12 VW LCV 4 Vo 5 Other 1

Key executives: James Brearley, MD; Martin Reay, finance director; Kuldeep Billan, executive chairman; Derek Chiu, chief financial officer

Glyn Hopkin

Outlets: 36

Franchises: Dac 3 Kia 3 MG 10 Nis 13 Ren 3 Suz 2 Others 2

Key executives: Glyn Hopkin, chairman; Fraser Cohen, MD; Hady Laba, finance director; Shabir Chowdhury, sales director

Greenhouse Group

Outlets: 10

Franchises: Cit 1 Daf 4 Nis 1 Om 1 Pe 1 Vaux 1 VW LCV 1

Key executives: Derek Passant, chief executive; Mike Pawson, finance director; Ashley Passant, MD

Group 1 Automotive

Outlets: 150

Franchises: Au 15 BMW 15 Cit 1 Cup 2 Ford 5 Ford LCV 5 Jag 4 Kia 2 LR 10 Lex 4 MB Car 17 Mini 15 Pol 2 Seat 2 Ško 3 Sm 8 Toy 10 VW 24 VW Vans 6

Key executives: Mark Raban, UK chief executive; Mark Leeder, finance director; Daryl Kenningham, group chief executive; Daniel McHenry, chief financial officer

H**Halliwell Jones Group**

Outlets: 12

Franchises: BMW 5 In 1 Mini 5 Other 1

Key executives: Phillip Jones, MD; Glyn Howes, finance director; James Houghton, sales director

Hartwell

Outlets: 21

Franchises: BYD 3 Ford 10 Ford LCV 4 GWM 2 Om 2

Key executives: Kevin Godfrey, MD; Kayleigh Rowe, director

Harwoods Group

Outlets: 20

Franchises: AM 1 Au 4 Ben 2 BYD 1 In 1 Jag 4 LR 4 Ford 1 Vo 1 Other 1

Key executives: Guy Harwood, chairman; Archie Harwood, chief executive; Guy Rowson, finance director

Hatfields

Outlets: 7

Franchises: Jag 3 LR 4

Key executives: Gareth Williams, MD; Philip Bennett, finance director; Craig Petty, sales director; Stuart Baldwin, service director

Hedin Automotive UK

Outlets: 17

Franchises: BMW 5 MB Car 3 MB LCV 3 Mini 3 Smart 3

Key executives: Richard Ennis, chief executive; Peter Williams, finance director

Hendy Group

Outlets: 69

Franchises: Ab 1 Cit 1 Cup 1 Dac 8 Fiat 1 Ford 7 Ford LCV 4 Hon 1 Hy 2 Iv 2 Jag 2 Kia 6 LR 3 Lo 1 Maz 4 MG 3 Nis 4 Pe 2 Ren 8 Seat 1 Ško 2 Vaux 3 Others 2

Key executives: Paul Hendy, chief executive; Jonathan Moritz, chief financial officer; Simon Gulliford, chairman; Duncan McPhee, chief operating officer

Heritage Automotive

Outlets: 15

Franchises: Au 1 Hon 1 In 2 Ško 1 VW 3 Others 7

Key executives: Richard Neulander, director; Nick Hinallas, director

Howards Group

Outlets: 20

Franchises: Cit 3 DS 1 Hon 2 Hy 4 Kia 2 Nis 1 Peu 4 Suz 2 Toy 1

Key executives: Peter Coleman, chairman; Chris Lee, MD; Mark Eggar, chief financial officer; Jonathan Coleman, executive director; Louise Devine, marketing director

HR Owen

Outlets: 21

Franchises: AM 2 Bn 3 Bug 1 Fe 3 Lambo 4 Lo 2 Mas 2 RR 1 Others 3

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

HSF Group

Outlets: 6

Franchises: Vo 6

Key executives: Charles Slaughter, MD; Peter Nott, sales director; Chris Carter, group aftersales manager

JCB Group

Outlets: 28

Franchises: Cit 1 Cup 3 Dac 3 Kia 3 Maz 1 MB LCV 1 Ren 3 Seat 3 Ško 2 VW 3 VW LCV 4 Other 1

Key executive: Jonathan Bischoff, MD

JCT600

Outlets: 49

Franchises: AM 1 Au 7 Ben 1 BMW 1 Cup 3 Fer 2 Kia 1 LR 1 Lo 1 Mas 1 Maz 1 Mini 1 MB Car 5 Pol 5 RR 1 Seat 3 Sm 2 VW 7 VW LCV 5

Key executives: John Tordoff, executive chairman; Ian Tordoff, director; Nigel Shaw, finance director; Richard Hargraves, MD

Jemca Car Group

Outlets: 11

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

Outlets: 39

Franchises: Au 2 BMW 2 Cup 2 Dac 1 Jag 4 Kia 1 LR 6 MG 2 Mini 2 Nis 1 Ren 1 Seat 2 Ško 3 VW 3 VW LCV 1 Vo 3 Others 3

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

John Grose Group

Outlets: 9

Franchises: Cit 1 DS 1 Ford 3 Ford LCV 1 Kia 1 Om 1 Peu 1

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

Johnsons Cars

Outlets: 52

Franchises: Abar 1 AR 1 Cup 2 Fiat 1 Fiat LCV 1 Ford 2 Hon 4 Hy 6 Jeep 1 Lex 1 Maz 5 Seat 3 Ško 8 Suz 1 Toy 3 VW 11 Vo 1

Key executives: Martin Sumner, MD; Mike Berwick, operations director; Richard Martin, finance director

L

Listers

Outlets: 52

Franchises: Au 4 BMW 2 Cup 2 Hon 3 Jag 2 LR 3 Lex 4 MB Car 4 Mini 2 Om 1 Pol 1 Seat 2 Ško 1 Sm 2 Toy 9 VW 6 VW LCV 2 Vo 2

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

Lithia

Outlets: 187

Franchises: Ab 2 AM 3 Au 12 BMW 11 BYD 5 Cit 10 Dac 6 DS 2 Fe 3 Fiat 2 Ford 31 Ford LCV 4 Hy 2 Gen 1 In 1 Jag 10 Jeep 1 Kia 2 LR 12 Mas 1 McL 2 MB Car 13 Mini 11 MG 2 Nis 3 Peu 6 Pol 6 Ren 6 Sm 6 Vaux 18 Others 2

Key executives: Neil Williamson, regional president; Richard Thomas, chief financial officer; Justin Byrne, chief technology and innovation officer

Lloyd Motors

Outlets: 26

Franchises: BMW 6 Jag 2 Kia 3 LR 4 Mini 6 VW 1 Vo 2 Others 2

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

LSH Auto UK

Outlets: 15

Franchises: BYD 4 MB Car 6 MB LCV 3 Sm 2

Key executives: Vaughan Blackman, MD; Masim Syed, chief financial officer; Tracy Ellam, operations director

M

Marriott Motor Group

Outlets: 10

Franchises: Au 3 GWM 1 Ško 2 VW 3 VW LCV 1

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

Marsh Wall

Outlets: 9

Franchises: BMW 5 Mini 4

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

Marshall Motor Group

Outlets: 152

Franchises: AM 1 Au 12 BMW 5 Cup 3 Ford 2 Ford LCV 2 Hon 8 Hy 7 Jag 8 LR 10 MB Car 8 MB LCV 4 MB Truck 4 Mini 4 Nis 11 Peu 7

Seat 4 Ško 15 Sm 1 Vaux 2 Vaux LCV 2 VW 17 VW LCV 6 Vo 7 Others 2
Key executives: Martin Casha, chief executive; Mark Hemus, finance director; Trevor Fussey, joint MD; Mark Robinson, joint MD

Mon Motors

Outlets: 24

Franchises: Au 4 Cup 2 Ford 3 Ford LCV 1 Seat 3 Ško 4 VW 5 VW LCV 1 Vo 1

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

Motus UK (incl. Pentagon Group)

Outlets: 46

Franchises: BYD 2 Cit 2 Cup 1 Dac 2 Fiat LCV 4 Ford 3 Ford LCV 2 Kia 1 Maz 1 Nis 1 Peu 5 Ren 2 Seat 3 Vaux 10 Vaux LCV 6 Other 1

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

P

Park's Motor Group

Outlets: 68

Franchises: BMW 3 Bn 1 Dac 6 Ford 5 Ford LCV 4 Hon 4 Hy 4 Jag 2 Kia 3 Lambo 1 Lex 1 Lo 1 LR 2 Maz 2 McL 2 MG 1 Mini 3 Nis 3 Om 2 Ren 6 Ško 2 Suz 3 Toy 5 Vo 1 Other 1

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

Parkway Derby

Outlets: 6

Franchises: VW 4 VW LCV 2

Key executive: Sean Booth, MD

Partridge of Hampshire

Outlets: 2

Franchises: BMW 1 Mini 1

Key executive: Toby Partridge, MD

Peoples

Outlets: 12

Franchises: Ford 6 Ford LCV 6

Key executives: Brian Gilda, chairman and MD; Stewart Ramsay, finance director; Nicola Gilda, MD

Perrys Group

Outlets: 48

Franchises: Cit 3 Cup 1 Ford 6 Ford LCV 4 Kia 5 Maz 5 MG 3 Peu 6 Seat 2 Vaux 13

Key executives: Darren Ardron, MD; Ken Savage, commercial director; Denise Millard, chief executive; Christopher Thexton, finance director; Rachael Millard, director

Peter Vardy

Outlets: 7

Franchises: BMW 1 Jag 1 LR 1 Mini 1 Om 1 Pol 2

Key executives: Peter Vardy, chief executive; Sir Peter Vardy, chairman; Alastair Grier, chief operations officer; Euan Cameron, commercial director; Claire Rogan, digital director

Porsche Retail Group

Outlets: 5

Franchises: Por 5

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

PSA Retail UK

Outlets: 68

Franchises: Abar 5 AR 1 Cit 17 DS 6 Fiat 5 Jeep 1 Peu 25 Vaux 8
Key executives: Richard Garbutt, chief executive; Luis Fazendeiro, chief financial officer; Stuart Bullimore, operations director

R

Ray Chapman Motors

Outlets: 4

Franchises: Vo 4

Key executives: Duncan Chapman, MD; Ray Chapman, chairman; Nathan Chapman, sales director; David Kellett, aftersales director

Renault Retail Group

Outlets: 33

Franchises: Dac 12 Nis 3 Ren 13 Others 5

Key executives: Frederic Maillard, MD; Adrian Burke, finance director; Rachel Yates, HR director; Elina Karppinen, marketing director

Richmond Cars

Outlets: 15

Franchises: Hy 4 Gen 2 MG 4 Ško 3 Suz 2

Key executives: Michael Nobes, chief executive; Sam Nobes, operations director

Riverside Motors Group

Outlets: 8

Franchises: Cup 1 Hon 1 Pol 1 Seat 1 Vo 4

Key executives: Mark Denton, MD; Stephen Wright, operations director

RRG Group and Norton Way Motors

Outlets: 32

Franchises: Cit 1 Hon 2 Kia 2 Lex 2 Maz 2 MG 2 Nis 2 Om 1 Peu 3 Ško 2 Toy 11 Others 2

Key executives: Fumihito Ando, director Marubeni Auto Investment UK; Arran Bangham, vice-chairman RRG Group; Jason Cranswick, chief operating officer, Marubeni Auto Investment UK, and MD Norton Way Motors

Ryland Automotive

Outlets: 14

Franchises: Ben 2 Lamb 1 LR 1 Lo 3 Mas 1 Mcl 1 Por 2 RR 1 Other 1

Key executives: Peter Whale, chairman; Henry Whale, MD

S**Sandiccliffe Motor Group**

Outlets: 14

Franchises: Ford 3 Ford LCV 2 GWM 1 In 1 Maz 3 MG 2 Nis 1 Other 1

Key executives: Andrew Woodhouse, chairman; Paul Woodhouse, MD; Nicholas Woodhouse, company secretary; Tom Barton, director

Sandown Motors

Outlets: 15

Franchises: MB Car 7 MB LCV 1 Sm 7

Key executives: Gavin McAllister, MD; Gareth Copling, group financial director

SG Petch

Outlets: 21

Franchises: Abar 1 BYD 1 Fiat 1 Hy 3 Is 1 Jeep 1 Kia 4 Maz 4 Nis 1 Om 1 Peu 1 Seat 2

Key executives: Steve Petch, MD; Samantha Petch, sales and marketing director; Shaun Burke, sales director; Andrew Hodgson, aftersales director; Simon Rees, finance director

Sinclair Group

Outlets: 25

Franchises: Au 2 BYD 1 Cup 1 GWM 1 Hy 1 Jag 1 LR 4 MB 4 Seat 1 Ško 1 VW 6 VW LCV 2

Key executives: Gerald Sinclair, chairman; Andrew Sinclair, MD; Jonathan Sinclair, director

Snows Motor Group

Outlets: 53

Franchises: Abar 2 AR 1 BMW 1 BYD 2 Cit 2 Cup 3 Dac 1 Fiat 2 Jeep 2 Kia 7 Ford LCV 2 Hon 2 Hy 2 Is 1 Jeep 6 KGM 1 Kia 5 Lex 2 Maz 8 MG 5

Key executives: Stephen Snow, chairman and chief executive; Neil McCue, chief operational officer; Alex Domone, chief operational officer; Shawn Gates, chief financial officer

Steven Eagell

Outlets: 44

Franchises: Lex 12 Toy 32

Key executives: Steven Eagell, chief executive; Gary Smith, MD; David Sherriff, finance director

Stoneacre Motor Group

Outlets: 123

Franchises: Abar 10 AM 1 Cit 2 Cup 3 Dac 5 Fiat 13 Fiat LCV 1 Ford 7 Ford LCV 2 Hon 2 Hy 2 Is 1 Jeep 6 KGM 1 Kia 5 Lex 2 Maz 8 MG 5 Nis 2 Pe 2 Ren 6 Seat 4 Suz 11 Toy 7 Vaux 3 Vo 8 Others 4

Key executives: Richard Teatum, chairman; Shaun Foweather, MD; Nigel Wood, finance director; Gerry George, aftersales director; Philip Wade, franchise and development director

Swansway Garages

Outlets: 22

Franchises: Au 6 BYD 2 Cup 1 Hon 2 LR 1 Peu 1 Seat 1 VW 3 VW LCV 5

Key executives: Michael Smyth, chairman; Peter Smyth, director; David Smyth, director; John Smyth, director; Richard Marstand, finance director

Sytner

Outlets: 156

Franchises: AM 1 Au 14 Ben 4 BMW 23 Fer 5 Jag 5 Lambo 3 LR 12 Mas 4 Ford 1 MB Car 22 MB LCV 1 Mini 23 Pol 8 RR 2 Seat 1 Ško 1 Sm 12 VW 3 VW LCV 1 Vo 5 Others 5

Key executives: Darren Edwards, chief executive (retiring); John Cragg, incoming chief executive; Simon Moorhouse, chief financial officer; Melvin Rogers, HR director; Jeremy Mallett, director

T**TC Harrison Group**

Outlets: 16

Franchises: Ford 7 Ford LCV 3 Others 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

Outlets: 30

Franchises: Dac 4 Gen 1 GWM 1 Hon 3 Hy 7 Maz 2 MG 3 Nis 2 Om 1 Ren 4 Vo 1 Other 1

Key executives: Darren Holdcroft, MD; Chris Greenhall, operations director; Martin McCormick, finance director

Thurlow Nunn

Outlets: 14

Franchises: Hy 1 MG 1 Peu 2 Vaux 10

Key executives: Will Tew, MD; Sam Billing, finance director; Simon Grylls, sales director

Toomeys

Outlets: 21

Franchises: Ab 1 Cit 1 Dac 2 DS 1 Fiat 1 Hy 2 MG 2 Nis 2 Om 1 Peu 2 Ren 2 Vaux 2 Vaux LCV 2

Key executives: Michael Toomey, director; Jonathan Brook, director; Paul Plant, director

TrustFord

Outlets: 40

Franchises: Ford 24 Ford LCV 16

Key executives: Julia Greenhough, marketing director; Stuart Mustoe, chief executive; John Leeman, operations director; Sharon Ashcroft, HR director; Stuart Cresswell, aftersales director

V**Vantage Motor Group**

Outlets: 13

Franchises: Kia 1 Lexus 2 Ško 1 Toy 9

Key executives: Andrew Mallory, chief operating officer; Tim Swindin, chief financial officer

Vertu Motors

Outlets: 204

Franchises: Au 1 BMW 7 BYD 1 Cit 7 Cup 3 Dac 9 DS 1 Fer 1 Ford 20 Ford LCV 6 Hon 17 Hy 11 Jag 3 Kia 3 LR 10 Maz 2 MB Car 5 MB LCV 1 MG 4 Mini 7 Nis 12 Peu 12 Ren 9 Seat 3 Ško 3 Sm 1 Toy 6 Vaux 16 Vaux LCV 1 VW 8 VW LCV 1 Vo 5 Others 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

Outlets: 16

Franchises: Au 5 Cup 1 Seat 1 Ško 2 VW 4 VW LCV 2 Other 1

Key executives: Jamie Vindis, MD; Gary Vindis, chairman; Tim Potter, finance director; Peter Toop, commercial director

Vines Group

Outlets: 7

Franchises: BMW 3 Mini 3 Other 1

Key executive: Sean Kelly, MD

Vospers

Outlets: 33

Franchises: Abar 3 AR 1 Cup 1 Dac 1 Fiat 3 Fiat LCV 3 Ford 3 Ford LCV 3 Jeep 1 Maz 3 MG 1 Om 3 Peu 2 Peu LCV 1 Ren 1 Seat 1 Vaux 1 Vaux LCV 1

Key executives: Peter Vospers, chairman; Nick Vospers, MD; Jonathan Tremain, sales director; Neil Tickner, aftersales director; Mark Haslam, contact and communications director

VT Holdings

Outlets: 19

Franchises: Abar 1 Dac 1 Fiat 1 GWM 1 Hy 2 Kia 5 Maz 1 Nis 5 Peu 1 Ren 1

Key executives: Tim Bagnall, director; Andrew Dunne, head of finance; Mark Pardoe, director; Chris Wiseman, director

W**Waylands Automotive**

Outlets: 11

Franchises: Kia 2 MG 2 Pol 1 Vo 6

Key executives: John O'Hanlon, chief executive; Richard Spencer, aftersales director; James Smullen, finance director; Vicky Hart, head of marketing

William Morgan Group

Outlets: 6

Franchises: BMW 2 Mini 2 Others 2

Key executive: William Le Fevre, MD

Williams Motor Company

Outlets: 13

Franchises: BMW 5 Jag 1 LR 1 Mini 5 Other 1

Key executives: Margaret Orton Williams, chair; William Adams, MD; Michael Sherwin, non-exec director

Worcester Carsales

Outlets: 15

Franchises: Cit 1 Hy 2 Kia 1 Maz 1 MG 1 Om 1 Pe 1 Suz 3 Vx 4

Key executives: Stuart Grieveson, MD; Ali Grieveson, director

WR Davies

Outlets: 15

Franchises: Cit 2 Dac 1 DS 1 Fo 3 Nis 3 Pe 1 Ren 1 Toy 3

Key executives: Jonathan Davies, MD; Craig Taylor, finance director

Y**Yeomans**

Outlets: 38

Franchises: Au 1 Cit 4 Cup 2 DS 1 Hon 5 Hy 1 Nis 8 Peu 2 Seat 2 Ško 4 Toy 3 Vaux 1 VW 2 VW LCV 2

Key executives: James Smith, chairman and MD; 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; BYD BYD; Cit Citroën; Cit LCV Citroën Vans; Cup Cupra; Dac Dacia; Daf Daf; DS DS Automotives; Fe Ferrari; Fiat Fiat; Fiat LCV Fiat Vans; Ford Ford; Ford LCV Ford Vans; Gen Genesis; GWM GWM Ora; Hon 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; Nis Nissan; Nis LCV Nissan Vans; Om Omoda; Peu Peugeot; Peu LCV Peugeot Vans; Pol Polestar; Por Porsche; Ren Renault; Ren LCV Renault Vans; Ren Truck Renault Trucks; RR Rolls-Royce; Seat Seat;



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20 YEARS OF AUTOGLYM'S PREMIUM VEHICLE PROTECTION

Autoglym LifeShine has been at the forefront of the vehicle protection system market since it was launched in 2004. Created by the UK's largest car care provider, Autoglym, LifeShine offers the reassurance of a trusted household name, paired with unparalleled technology and innovation. The vehicle protection system is renowned for preserving both exterior and interior car surfaces. Originally developed to address the demand for long-term vehicle care, LifeShine quickly became popular as a premium service offered by car dealerships, providing more comprehensive protection than standard waxes and polishes. Autoglym's established reputation, combined with LifeShine's all-encompassing approach, positioned it as a top choice in automotive care, especially for new car buyers looking to protect their purchase from day one.

EARLY GROWTH AND MARKET SUCCESS

In its early years, LifeShine grew rapidly, leveraging partnerships with dealerships to make its protection system a staple in the UK. Autoglym began enhancing LifeShine's formula to incorporate advances in automotive protection technology. These improvements provided superior resistance to environmental pollutants like UV rays, bird droppings, and acid rain, while also extending the product's longevity. The updated formulations offered paint treatments that bonded molecularly to surfaces, glass coatings that repelled water and dirt, and interior treatments that resisted stains without compromising fabric quality.

TECHNOLOGICAL ADVANCEMENTS IN THE 2010s

Autoglym's R&D team based in Letchworth has continued to innovate with the creation of surface protection products that remain at the cutting edge in terms of performance and ease of application. LifeShine was the first system in the segment to feature a water-based non-aerosol interior protectant product, placing a keen focus on the safety of those applying the protection system.

ADAPTING TO MODERN AUTOMOTIVE TRENDS

In 2023 Autoglym launched an all-new iteration of LifeShine incorporating CeraFuse™ Technology, which combines Polysilazane technology with reactive silicone polymers that bond to the paintwork, creating an ultra-durable ceramic barrier for a lifetime of flawless shine, colour enhancement and superior protection.

Product performance is only part of the picture. A standout benefit for LifeShine partners is the comprehensive support from the Autoglym team. This comes in the form of digital marketing and point of sale assets, sales training, and technical application training. This complete solution helps partners to sell and apply with confidence, not to mention a lifetime guarantee backed by Autoglym, to fall back on, covering customers for bird lime on exterior surfaces and dye transfer on interior upholstery.

FUTURE VISION: SUSTAINABILITY AND INNOVATION

Looking forward, Autoglym's vision for LifeShine combines innovation and sustainability. The company is investing in research to develop a more sustainable approach to vehicle care and protection, aiming to minimise its environmental footprint. This includes energy-efficient production processes and using recycled materials in packaging. By addressing both advanced technology and sustainable practices, Autoglym is positioning LifeShine to lead in vehicle protection as the automotive industry evolves, offering future generations of car owners high-quality, eco-conscious vehicle care. Through cutting-edge technology and a commitment to sustainability, Autoglym LifeShine is set to continue as a premium choice in vehicle protection, reflecting over two decades of excellence and adaptability in automotive care.

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