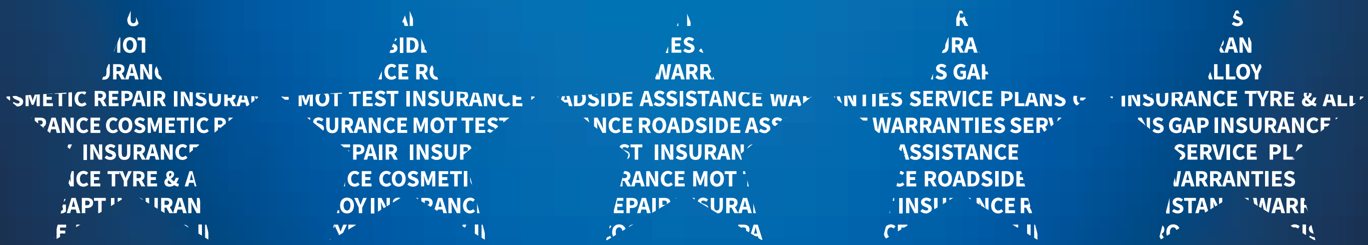
AM 100

In association with BDO

REVEALED & ANALYSED

The **2021** financial performance of the UK's top 100 dealer groups



EDITOR'S LETTER

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Welcome to the 2021 AM100 report. I'm delighted that this is the second year of the AM100 research in partnership with the motor trade experts at accountancy firm BDO. Its head of motor retail, Steve Le Bas, and senior audit manager James Evans, have been involved in auditing the AM Awards for several years, and have kindly agreed to tackle the AM100's number-crunching.

This is also the second year that the AM100 has been published in November. Doing so allows us to base it on the data from statutory accounts, so there will be very few estimates in this and future AM100 listings.

Doing it this way ensures a wholly accurate picture of the state of the industry in 2020. Given the turmoil that UK motor retailers faced in a year which was enveloped in a once-in-a-lifetime pandemic there are many fascinating observations that come out of this year's data.

You can read the findings overleaf, while the main turnover table is in the centre. You can also watch a webinar presentation on the AM100, which is being recorded on November 24 – keep an eye on AM-online for more information on how to watch.

Tim Rose
Editor

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AM 100

in association with BDO

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BAUER MEDIA GROUP abc recycle

With more than nine million users in the UK, carwow helps dealers, brands, and brokers tap into the online demand for car buying and selling.

In 2021, it launched Sell Your Car meaning dealers can buy stock directly from carwow's users with the lowest fees on the market.

Dedicated to the omnichannel world, carwow offers data-driven tools and services, including lead generation, brand building, e-commerce training, marketing and advertising.

carwow is also one of the most influential names in car media with the biggest automotive channel on YouTube fronted by Mat Watson.

Headquartered in London, carwow employs more than 300 people in the UK, Germany and Spain and is backed by some of the top technology, marketplace and automotive investors.

For more information visit www.dealers.carwow.co.uk or call 0333 150 0777. Subscribe to the carwow channel on www.youtube.com/carwow

Infinity is a leader in call intelligence. We provide tools that help you unearth transformational insights from every phone call so you can drive more sales, optimise your marketing activity and streamline operations.

We'll help you join up your user journeys and get complete visibility into what's driving awareness, engagement and conversion so you can optimise your budget. And, by analysing what happens on your calls at scale, we'll arm you with the insights needed to enable smarter selling and provide frictionless experiences in your contact centres.

As well as being an official Facebook Marketing Partner, we're able to offer unrivalled call tracking integrations across the Google suite and many other platforms. This means your call data can be sent exactly where it's needed.

And thanks to our global reach, we can help you unlock the insights from your calls across all your locations.

We cover 85 countries, including the UK, USA and all of Europe.

Reputation is delighted to be sponsoring the AM100 for 2021. The AM100 recognises the top 100 dealer groups by revenue, but, of course, there's so much more to it than annual revenue. We understand that revenue is maintained and grown when everyone within a business is working towards the same goal and when total focus on the customer is a key goal for all stakeholders.

We've seen years of digital transformation in such a short space of time.

This will benefit both the business and the buyer, as processes and platforms are put in place to ensure that every customer can be listened to and acted on, no matter where they are having dialogue.

Reputation is proud to be the unified platform of choice for reputation management and customer experience for the biggest brands in automotive, both in the UK and globally. Historically, the sector has thrived, but is now absolutely driven by, customer feedback and nobody understands this more than Reputation.

Find out more about Reputation at reputation.com/auto

POWERED BY BOOKMYGARAGE

SecretService, powered by BookMyGarage.com, is proud to be sponsoring the AM100. The dealers which occupy this list are among the very best within our industry and we are honoured to have many of them as partners on our platform.

While our partners continue to achieve excellent financial and growth results, we have been working closely to deliver incremental aftersales business, as well as helping to stop existing customers leaving at the point where they are at risk of doing so.

SecretService delivers confirmed conquest aftersales bookings with 63% of vehicles being from the profitable segments 2 and 3.

We fill the workshop ramps with high-opportunity work and our 'Intelligence' programme gives our partners the heads-up when their customers are 'in market' researching service and MOT prices online.

With our dedicated team of partnership managers, an online class-leading reporting tool and an average 400% revenue returned, we are ready to help drive your business forward too.

What does it take to be a top automotive brand?

Dealerships that effectively manage their digital reputations see **up to a 10% increase in average sales volume.**

Learn more at reputation.com/auto

At Reputation, we have analysed millions of customer automotive reviews and uncovered the top drivers of positive and negative sentiment for dealerships in our annual 2021 Automotive Reputation Report. These trends helped us understand what dealerships are doing well and what they need to improve. Here are key takeaways for dealerships to improve and manage their reputations.

Learn from Customer Reviews

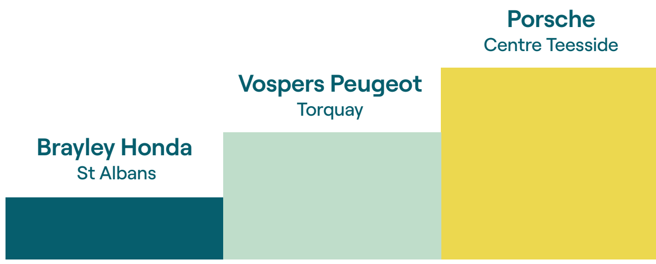
Our research reveals that review volume for 2021 is higher than ever, and 80% of car shoppers believe reviews are important to their decision-making. It's critical that dealers listen to reviews, respond to them, and learn from them. Watch for common themes emerging in both positive and negative reviews. Doing so will give dealerships first-hand insight into customer concerns and how to best respond.

For instance, our latest report shows dealerships should be especially vigilant for negative sentiment resulting from the global chip shortage. We see a pattern of complaints from shoppers who believe dealerships are using the shortage as an excuse to charge unreasonably high prices. Dealerships don't need to apologise for their prices, but they do need to monitor reviews and reply with empathy and understanding.

Put Google My Business Listings to Work

Google My Business (GMB) listings are becoming even more influential. Our GMB analysis shows an increase in GMB views and actions. Shoppers are increasingly using GMB listings to learn about dealerships, read reviews, and then click to visit their websites, call the dealer, or find directions to visit the forecourt. Dealerships need to treat GMB listings as content powerhouses. For example, they should encourage customers to publish reviews on their GMB listings. That's because GMB listings have an inordinately high impact on visibility. Another way for dealerships to increase visibility is to capitalise on their ability to publish multiple listings for departments such as sales, parts, and service. Separate GMB listings make each department at a single location more visible for all the ways people might search for something they need from a dealer.

Top 3 UK Dealerships



Top 10 Dealer Groups

Ranking	Brand	Reputation Score	Sentiment	Visibility	Engagement
1	Snows Motor Group	751	89%	68%	96%
2	Vantage Motor Group	746	89%	66%	93%
3	RRG Group	722	79%	73%	93%
4	JCT600	711	77%	72%	93%
5	Listers	699	83%	66%	86%
6	Sytner	661	76%	64%	79%
7	T G Holdcroft	654	77%	68%	83%
8	Lookers	651	71%	70%	94%
9	Eden Motor Group	644	75%	64%	77%
10	Hendy Group	643	74%	60%	98%

To view the full rankings from the 2021 Automotive Reputation Report, visit reputation.com/auto

PROFITS UP DESPITE CHALLENGES POSED BY COVID-19 LOCKDOWNS

Arnold Clark is by far the biggest profit generator of the AM100

TURNOVER CHANGE BY PERCENTAGE AND VALUE

Rank 2021	Group	Turnover growth (%)
13	Motus UK (incl. Pentagon Group)	116.4%
92	Richmond Cars	29.8%
28	Steven Eagell	14.4%
51	Citygate Group	13.0%
31	Johnsons Cars	8.4%
16	Park's Motor Group	2.0%
94	Chorley Group	1.9%
74	Marsh Wall	1.4%
42	Currie Motors	0.5%
25	RRG Group and Norton Way Motors	-0.8%
17	Greenhous Group	-1.2%
63	Bowker Motor Group	-1.4%
20	Swansway Garages	-1.9%
22	Motorline	-3.1%
88	Howards Group	-3.2%
45	Porsche Retail Group	-4.6%
87	Fish Brothers	-4.8%
6	Marshall Motor Holdings	-5.3%
96	Central Garage Uppingham	-5.7%
86	SG Petch	-6.3%
35	Peter Vardy	-6.5%
26	Dick Lovett Group	-8.3%
99	Ancaster Group	-8.8%
66	Yeomans	-8.9%
83	Riverside Motors Group	-9.0%

Rank 2021	Group	Turnover growth (£)
13	Motus UK (incl. Pentagon Group)	518,520
28	Steven Eagell	64,689
31	Johnsons Cars	38,373
51	Citygate Group	30,141
92	Richmond Cars	29,802
16	Park's Motor Group	15,737
94	Chorley Group	2,416
74	Marsh Wall	2,376
42	Currie Motors	1,867
63	Bowker Motor Group	(3,055)
88	Howards Group	(4,517)
25	RRG Group and Norton Way Motors	(5,048)
87	Fish Brothers	(7,232)
96	Central Garage Uppingham	(7,456)
17	Greenhous Group	(9,637)
86	SG Petch	(9,702)
99	Ancaster Group	(11,647)
20	Swansway Garages	(13,658)
45	Porsche Retail Group	(15,016)
83	Riverside Motors Group	(15,100)
98	Arbury	(17,949)
66	Yeomans	(18,682)
84	Cotswold Motor Group	(19,580)
100	Drift Bridge Group	(20,414)
22	Motorline	(22,557)

Turnover figures across the AM100 were down, but dealerships found ways to adapt

2020 was an unprecedented year, one in which the world completely changed. At the start of the year motor retailers (like the rest of the country) might never have heard of 'furlough' and had you told them they would need to close for a little more than two months while the Government would subsidise the wages of the majority of their staff, you would be asked if you needed to see a doctor (who you would subsequently applaud on a Thursday night).

Furthermore, once showrooms reopened on June 1, 2020, dealers would not have expected the strength of tailwinds in the sector that would lead to many groups ending 2020 with an improved result compared with 2019.

Across the AM100 cohort turnover fell by 18% from £69 billion to £57bn which equates to roughly two months of revenue. Of this cohort just 10 groups managed

PROFIT BEFORE TAX (PBT) – TOP PERFORMERS

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

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

Rank 2019	Group	PBT (£'000)
1	Sytner Group	129,000
4	Arnold Clark Automobiles	113,500
2	Lookers	54,800
3	Pendragon	47,800
7	Marshall Motor Holdings	25,667
5	Vertu Motors	23,533
11	JCT600	17,079
15	Stoneacre	14,207
12	Listers Group	13,439
10	TrustFord	12,358
17	Hendy Group	11,336
8	Jardine Motors Group	11,319
26	Helston Garages Group	10,571
22	Eastern Holdings	10,500
25	Cambria Automobiles	9,827
32	Lloyd Motors	9,819
55	Hatfields	9,647
28	Allen Ford	9,527
29	RRG Group and Norton Way Motors	8,558
24	Harwoods	8,426

RETURN ON SALES (ROS) – TOP PERFORMERS

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

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

Rank 2019	Group	ROS (%)
55	Hatfields	3.3%
66	CEM Day	3.0%
4	Arnold Clark Automobiles	2.7%
53	Porsche Retail Group	2.6%
98	Arbury	2.4%
1	Sytner Group	2.1%
97	Riverside Motors Group	2.1%
83	Cotswold Motor Group	2.0%
44	Steven Eagell	2.0%
50	City West Country	2.0%
59	Peoples	1.9%
82	Toomeys	1.8%
32	Lloyd Motors	1.7%
68	Drive Motor Retail	1.7%
26	Helston Garages Group	1.7%
60	Hartwell Plc	1.6%
28	Allen Ford	1.6%
25	Cambria Automobiles	1.6%
73	Yeomans	1.6%
22	Eastern Holdings	1.5%

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September 2021: 21% of carwow sales reported by dealers were for Battery Electric Vehicles vs. the market average of 15.2% of new car registrations according to SMMT data.

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

Rank 2021	Group	PBIT
45	Porsche Retail Group	39,227
80	Toomeys	27,999
83	Riverside Motors Group	25,227
53	Hatfields	20,192
44	Halliwell Jones Group	19,932
65	CEM Day	18,677
42	Currie Motors	17,217
26	Dick Lovett Group	16,966
28	Steven Eagell	16,444
30	Lloyd Motors	15,980
59	City West Country	14,708
84	Cotswold Motor Group	14,209
2	Arnold Clark Automobiles	13,543
20	Swansway Garages	13,328
29	Helston Garages Group	13,037
95	Parkway Derby	12,750
74	Marsh Wall	12,526
90	Brayleys Cars	12,475
39	HR Owen	12,286
1	Sytner	12,060

Rank 2020	Group	PBIT
49	Porsche Retail Group	35,275
52	Hatfields	20,742
54	City West Country	17,799
69	CEM Day	13,954
24	Cambria Automobiles	12,887
39	Steven Eagell	12,674
25	Helston Garages Group	12,504
30	Allen Ford (Supergroup UK)	11,601
53	TC Harrison Group	11,431
58	Peoples	11,171
94	Arbury	10,830
85	Cotswold Motor Group	10,540
27	Dick Lovett Group	10,295
90	Fish Brothers	10,235
4	Arnold Clark Automobiles	10,206
31	Lloyd Motors	9,159
1	Sytner	8,587
40	TG Holdcroft	8,307
36	Peter Vardy	7,838
7	Marshall Motor Holdings	7,553

Rank 2019	Group	PBIT
53	Porsche Retail Group	27,810
55	Hatfields	24,186
82	Toomeys	16,924
97	Riverside Motors Group	16,650
50	City West Country	16,350
66	CEM Day	16,339
59	Peoples	13,430
1	Sytner Group	13,429
98	Arbury	13,254
24	Harwoods	11,583
44	Steven Eagell	11,396
32	Lloyd Motors	10,848
26	Helston Garages Group	10,637
4	Arnold Clark Automobiles	10,260
28	Allen Ford	9,793
21	Swansway	9,525
11	JCT 600	9,430
25	Cambria Automobiles	9,358
2	Lookers Plc	8,843
22	Eastern Holdings	8,588

PROFIT PER FRANCHISED OUTLET – TOP PERFORMERS

Rank 2021	Group	(£s)
45	Porsche Retail Group	2,314,400
35	Peter Vardy	1,545,167
53	Hatfields	983,778
63	Bowker Motor Group	931,167
26	Dick Lovett Group	867,059
65	CEM Day	850,778
1	Sytner	815,911
2	Arnold Clark Automobiles	778,607
59	City West Country	773,500
84	Cotswold Motor Group	709,636
83	Riverside Motors Group	675,550
30	Lloyd Motors	672,900
74	Marsh Wall	663,807
44	Halliwell Jones Group	634,600
17	Greenhous Group	614,900
28	Steven Eagell	601,464
95	Parkway Derby	582,229
20	Swansway Garages	508,700
36	Williams Motor Company	465,077
12	Listers	412,560

Rank 2020	Group	(£s)
49	Porsche Retail Group	2,050,200
18	Greenhous Group	1,018,111
52	Hatfields	879,900
54	City West Country	858,500
85	Cotswold Motor Group	662,637
4	Arnold Clark Automobiles	606,218
69	CEM Day	584,667
1	Sytner	574,392
36	Peter Vardy	507,399
58	Peoples	506,195
27	Dick Lovett Group	453,556
39	Steven Eagell	445,591
31	Lloyd Motors	393,429
30	Allen Ford (Supergroup UK)	366,676
25	Helston Garages Group	348,405
53	TC Harrison Group	335,154
44	Halliwell Jones Group	316,509
60	Drive Motor Retail	285,000
24	Cambria Automobiles	279,000
32	Sinclair Group	266,548

Rank 2019	Group	(£s)
53	Porsche Retail Group	1,611,400
55	Hatfields	964,700
1	Sytner Group	928,058
83	Cotswold Motor Group	884,250
66	CEM Day	700,400
50	City West Country	603,000
59	Peoples	588,444
4	Arnold Clark Automobiles	504,444
32	Lloyd Motors	490,950
24	Harwoods	468,111
36	Peter Vardy	445,833
14	Greenhous Group	435,875
97	Riverside Motors Group	406,714
31	Dick Lovett	385,167
43	Halliwell Jones Group	380,200
44	Steven Eagell	372,545
11	JCT 600	363,383
2	Lookers Plc	326,190
22	Eastern Holdings	318,182
29	RRG Group and Norton Way Motors	305,643

Porsche Retail Group remains untouchable for profit per employee and per franchised outlet

to increase their turnover and this was primarily as a result of acquisitions.

Motus UK saw the largest monetary increase as a result of a consolidation of its group restructure and there were notable acquisitions from Richmond Cars, Steven Eagell and Citygate Group.

Overall, the top seven groups (by turnover) remained in place though with a slight reshuffle as Arnold Clark jumped from fourth to second, ahead of Lookers and Pendragon, and Marshall moved up a place ahead of Group 1 Automotive.

Interestingly, bigger is not always better. The top quartile saw the largest fall in turnover of just in excess of 19%. The middle quartiles had a 16% fall and the bottom quartile just less than a 15% reduction. Overall, the proportion of revenue attributable to each quartile remained consistent: 66% of the turnover in the AM100 was provided by the largest 25 groups (67% the previous year).

During the year, groups were forced into a change in mindset with both customer engagement and their own sales processes.

While this change to a more digital space had already begun, the pace of change increased and dealers have shown once again their resilience in being able to adapt to these challenges which, in themselves, presented opportunities.

Many groups adapted extremely well and showed falls in revenue far below the average reduction. Both Marsh Wall and Yeomans managed to climb nine places in the AM100 table despite their number of outlets remaining consistent. There was no significant change to the make-up of the AM100 from the previous year.

Joining the cohort for the first time were Richmond Cars and Chorley Group at 92 and 94 respectively. A number of groups drop out with the largest (Robinsons) being acquired by Group 1 in the year. There remain a number of groups just outside the 100 who will be seeking to gain their place back in the future such as Ocean Automotive and the Sturgess Group.

While turnover might have seen a reduction as a result of the showroom closures, the sector tailwinds that followed in the second half of the year meant the profit before tax of the AM100 actually increased by 3% from £383m to £396m. There are always some exceptional profits or losses as a result of non-trading activity but many groups were able to outperform the previous year.

Almost a quarter of groups were able to achieve a return on sales of 2% or more. Only nine managed to achieve this in 2019.

Arnold Clark managed to break the 4% barrier with a net margin of 4.1% and a further six groups posted a return of 3%-plus. Porsche Retail Group had been the only group to achieve this the year before but had to 'settle' for the third best on the list despite an improved 3.7% return. CEM Day came in second.

Arnold Clark also continues to be the most profitable dealer (in £s) and of the 20 groups with the highest profits only seven are from the largest 20 groups. Special mentions go to Hatfields and CEM Day who are in the 20 groups for profit despite being in the bottom half of the AM100.

Overall, the AM100 achieved

a return on sales of 0.7% compared with 0.55% the year before. Once groups who made a loss are excluded (as many are as a result of non-trading items) the return on sales has increased from 1.3% in 2019 to 1.5% in 2020.

Throughout the unprecedented set of circumstances thrust upon the motor retail industry in 2020 staff up and down the country have continued to work hard with almost 125,000 staff employed across the AM100.

Porsche Retail Group continued its domination of the profit-per-employee table, and it is interesting to note that all of the top 20 groups by this metric had a profit of more than £12,000 per employee whereas in the previous year only seven managed to achieve this.

LOOKING FORWARD

Already in 2021 we have seen that 2020 was just the start of the evolution within the industry.

Since reopening showrooms in April 2021 after the third lockdown, the continuing supply issues in the new vehicle market combined with strong consumer demand have led to unprecedented growth in the value of used cars, with some vehicles being sold for a higher amount than their new counterparts.

These increases appear to be tailing off with latest Cap data showing an increase in used values of 'just' 1.2% for October, the lowest increase since April. However, we do not expect any sudden correction and used vehicle values will hold for a few more months yet. When the inevitable market correction arrives this is likely to take some time to filter through. The semi-conductor supply issues affecting the new vehicle market look set to have an impact throughout 2022 and likely into 2023 which will help to soften any market correction.

What the inflation in used vehicle values has meant is that dealer profitability looks set to hit record levels in 2022. Trading updates from the listed groups provides a snapshot of a sector that is benefiting from very strong margins.

The focus will remain on used car margins but also tackling workforce challenges. This encompasses both staff shortages and pay, with the Chancellor recently announcing an increase in the living wage to £9.50 per hour for those 23 years-plus.

There will be further opportunities for M&A activity as dealers capitalise on the strength of the sector, their balance sheets and cash positions and the expectation for increased consolidation in the market. This is supported by the recent Marshall acquisition of Motorline (being the largest deal for the past two-three years) and other large deals are expected to follow in the next year.

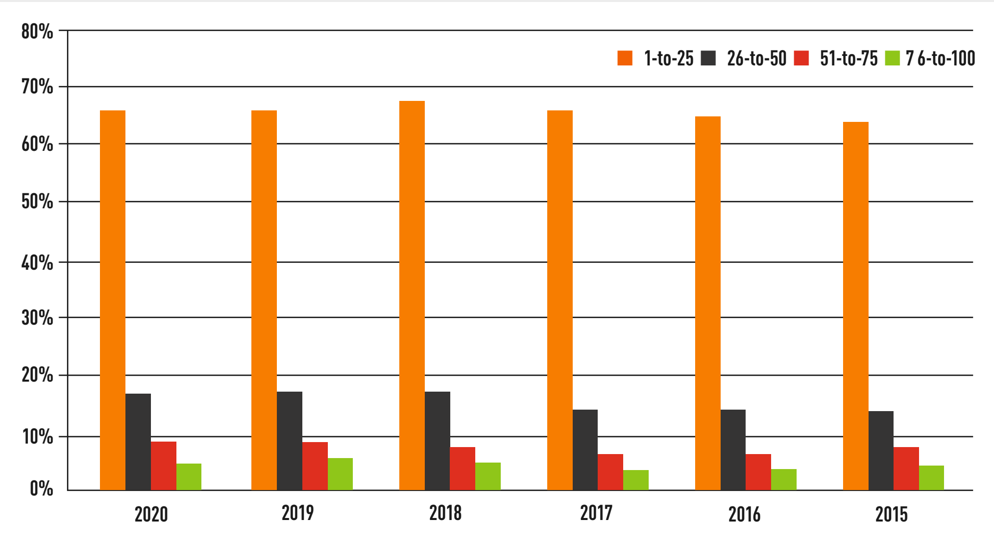
Moving forward beyond the next year there remain some unknowns. After significant levels of support from the manufacturers and funders and forecast record levels of profit, the OEMs might be keen to see some return on their investment in the AM100 and make up for 'lost time' with the issues encountered through new vehicle supply.

There is also an expectation that significant change is coming in the form of the agency model. It is not only the structure of the industry that is set to change but also the products sold, with the UK committed to end the sale of new ICE vehicles by 2030 and the continuing rise in electrification.

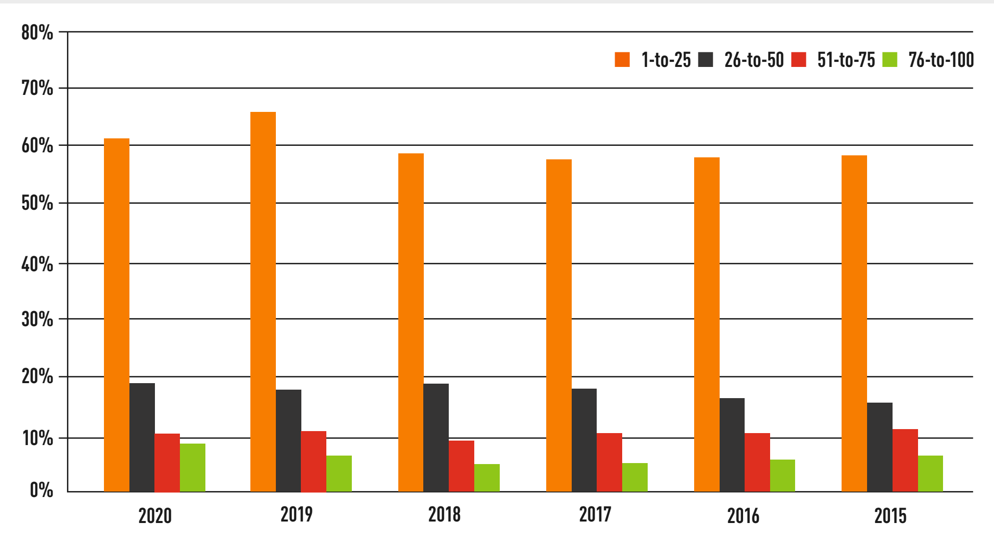
However difficult these challenges might seem what the past 18 months has shown is that the AM100 is a resilient group and capable of great agility when it faces up to challenges. And if one thing is to remain consistent against this backdrop it is that this will not change.

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

AM100 SHARE OF TOTAL TURNOVER BY QUARTILE



AM100 SHARE OF FRANCHISED OUTLETS BY QUARTILE



Notes on the AM100

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

BRANDS ON THE MOVE – AND THOSE STUCK IN GEAR

By David Francis, *AM* contributor

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

AT RISK

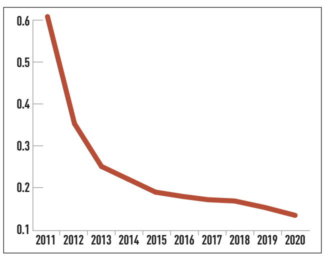
ALFA ROMEO

2011 Market share: 0.61% **2021 Market share:** 0.09%

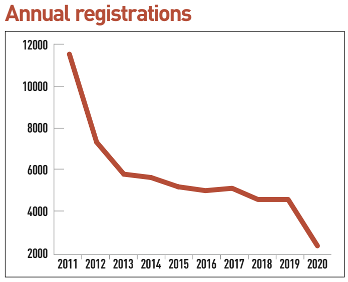
A new Alfa Romeo can still make the cover of a motoring magazine, yet any other premium brand with Alfa's sales would struggle to get a passing mention in an inside page. With a market share of less than 0.1%, Alfa Romeo now has fewer retail customers than Ferrari in the UK.

If Alfa Romeo is not actually dead in the UK, it appears to be in something of a vegetative state.

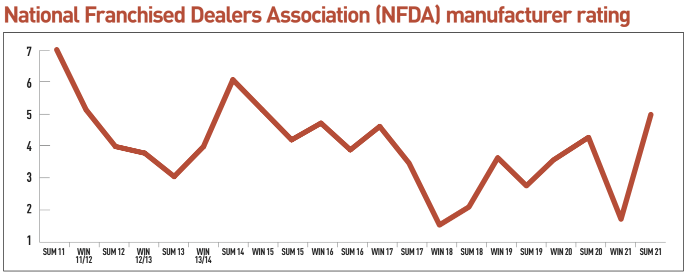
Market share



Annual registrations



National Franchised Dealers Association (NFDA) manufacturer rating



CITROËN (INCLUDING DS)

2011 Market share: 3.54% **2021 Market share:** 1.97%

Citroën has recovered slightly this year, thanks mostly to the new C4. However, that is also part of the problem. Citroën is, effectively, back to where it was in the 1990s: selling attractively-priced small and medium hatchbacks (albeit now in smaller volumes). Its early move into multi-purpose vehicles (MPVs) turned out to be a dead end, and its Aircross range of crossovers is making minimal impact on the market.

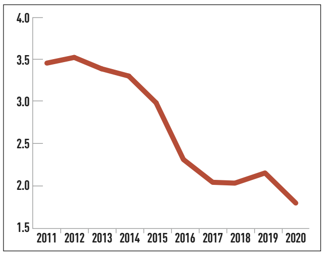
Citroën's move into premium with the DS range appears to be going the same way as its earlier move into MPVs. With market share of 0.14%, it is hard to discern the point of DS.

FIAT

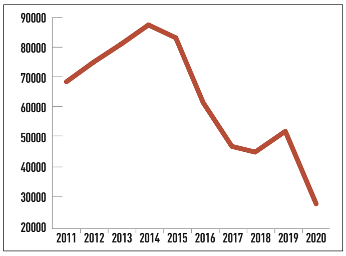
2011 Market share: 2.20% **2021 Market share:** 1.37%

86.5% of Fiat sales come from models badged "500", with most of the rest coming from the Panda. With sales around the same level as Suzuki, Fiat is no longer a mainstream brand in the UK. The 500 is clearly a great asset to parent company Stellantis, but it is hard to see what value the Fiat badge is adding.

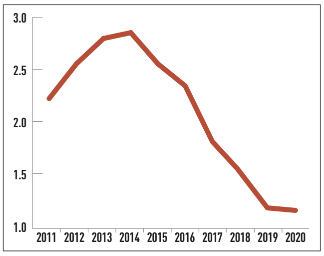
Market share



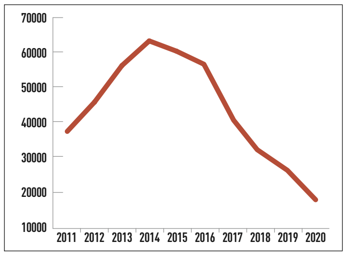
Annual registrations



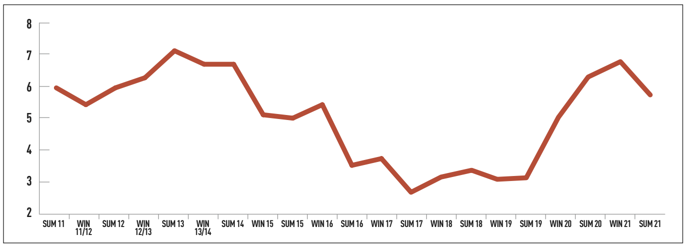
Market share



Annual registrations



NFDA manufacturer rating



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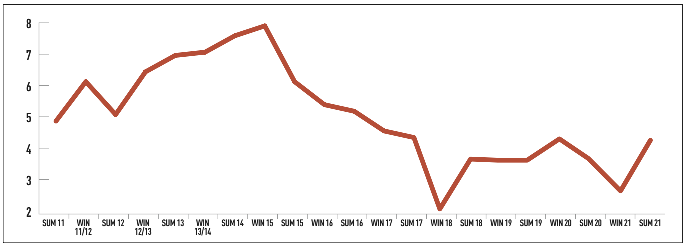


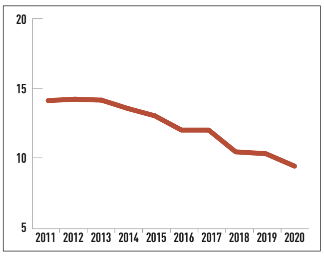
FORD

2011 Market share: 13.82% **2021 Market share:** 7.54%

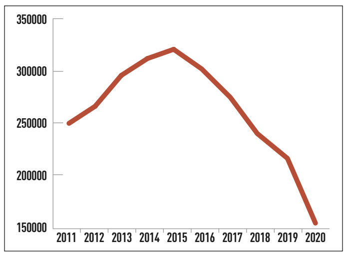
2021 is likely to go down as an "annus horribilis" in the history of Ford UK. After a dismal September, when Ford was in seventh position, it seems inevitable that it will lose its No 1 spot in 2021, after a run of 43 years at the top. Ford is more than 1.6 percentage points behind VW, which more of a chasm than a gap.

Ford now only has one major model that leads its segment (the Puma), with the Fiesta in second place and the Focus and Kuga both in fourth place in their respective segments. While the Puma and Kuga are doing reasonably good business, they have not made up for the losses suffered by the Fiesta and Focus, which both had spells as Britain's No 1 model in happier times.

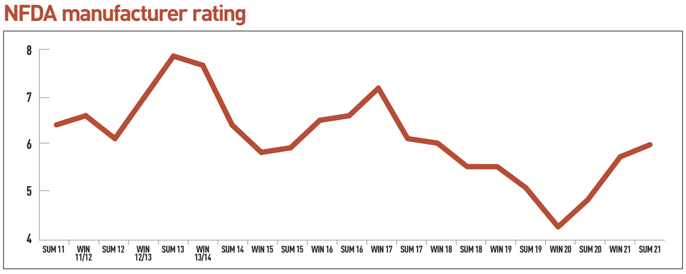
Market share



Annual registrations



NFDA manufacturer rating



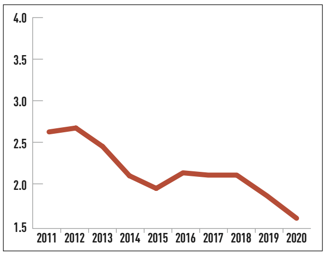
HONDA

2011 Market share: 2.55% **2021 Market share:** 1.71%

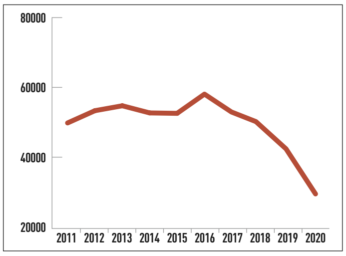
As ever, the Jazz is selling in respectable numbers, but it is the only Honda model to be in the Top 10 in its segment. The CR-V and the Civic are only just within the Top 20 in their respective segments. Meanwhile, the Honda E has "future classic" written all over it: beautiful design, but sky-high prices which restrict sales – think original Audi A2, or Ford Racing Puma.

Honda will continue to have a presence in Europe, but low volumes mean their cars will no longer be designed with Europe in mind.

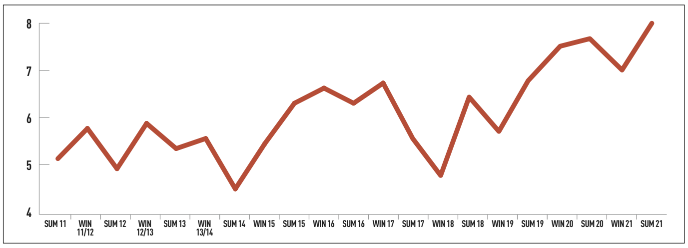
Market share



Annual registrations



NFDA manufacturer rating



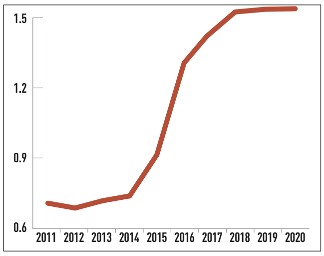
JAGUAR

2011 Market share: 0.73% **2021 Market share:** 1.18%

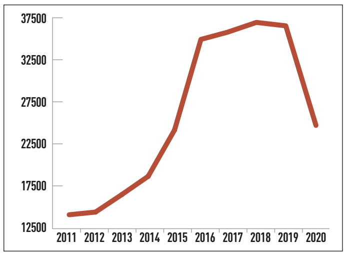
The F-Pace accounted for 40.5% of all Jaguar registrations year-to-date (YTD) 2021, and was a very respectable fifth in its segment. However, sales of the E-Pace and I-Pace both fell. Of those two, the I-Pace is more worrying for a brand that is going all-electric. Insiders at JLR say the I-Pace has been hit particularly hard by the chip shortage – sales in 2022 will show whether that is valid.

The future of the brand is opaque, to put it mildly. The decision to axe a fully production-ready model (the electric XJ) and write off the entire investment is unprecedented. JLR's new boss appears to have dismissed most of the range as inferior to the German competition, and hinted that a lower-volume Jaguar is to move upmarket, with prices broadly similar to the Range Rover.

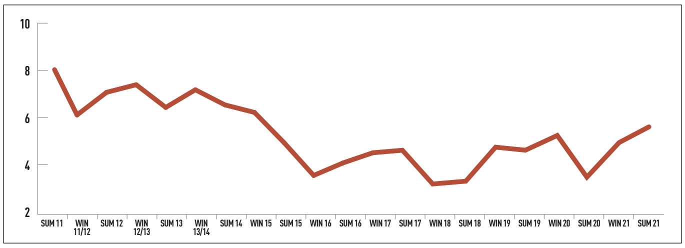
Market share



Annual registrations



NFDA manufacturer rating

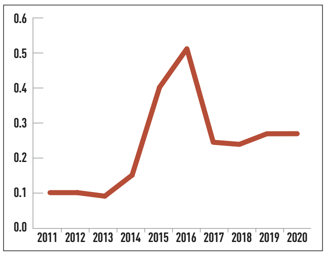


JEEP

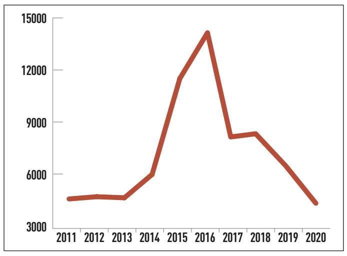
2011 Market share: 0.11% **2021 Market share:** 0.29%

All Jeeps, bar the ultra-niche Wrangler, sit resolutely at the bottom of the sales charts in their respective segments and are being outsold by a ratio of approximately 15:1 by their most popular rivals. The formula of taking a Fiat platform, adding a Jeep badge, and marketing the result as a premium model is convincing nobody. Maybe they can do better with a Stellantis Peugoet platform.

Market share



Annual registrations



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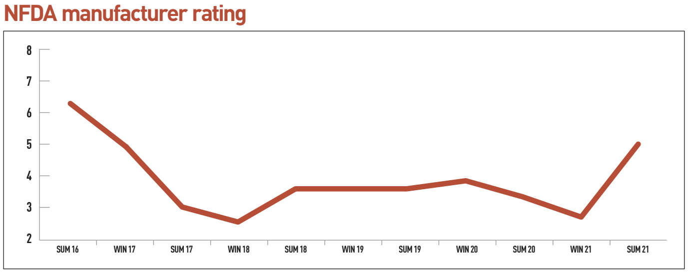


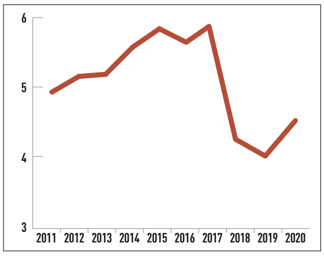
NISSAN

2011 Market share: 4.97% **2021 Market share:** 3.97%

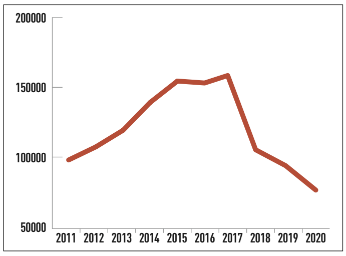
The Juke and the Qashqai are both second in their respective segments. For most manufacturers, that would be pretty respectable, but Nissan used to dominate the market for B- and C-segment crossovers, so this represents a major loss of market share.

Any recovery will depend on its two forthcoming EV crossovers (one of which is to be built in Sunderland). Nissan will be hoping that it can catapult the company back into the forefront of the electric revolution: the Leaf hatchback is looking like an increasingly tired concept.

Market share



Annual registrations



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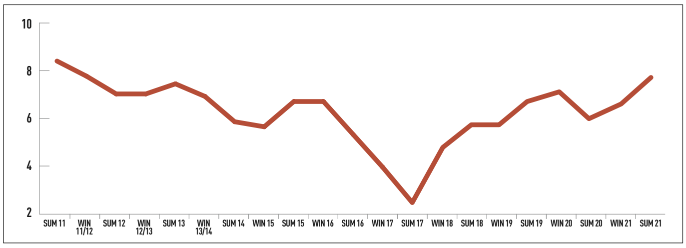


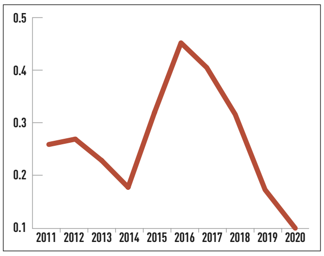
SMART

2011 Market share: 0.26% **2021 Market share:** 0.08%

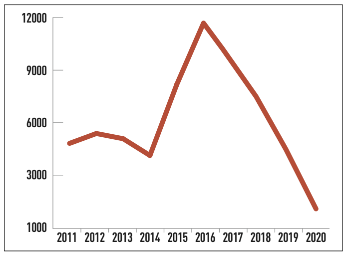
The smart factory in France has been sold to Ineos to make the Grenadier (the irony of the factory built for radical eco-cars now manufacturing a tribute to a 70-year-old 4x4 is almost as glaring as the irony of arch-Brexiteer Jim Radcliffe transferring planned production from Bridgend to the EU).

Market share has stabilised this year, helped by the new electric fortwo. However, the price/value equation will have to shift radically for smart to become remotely mainstream.

Market share



Annual registrations



SSANGYONG

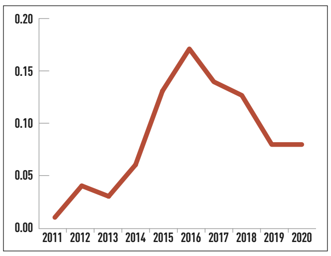
2011 Market share: 0.01% **2021 Market share:** 0.09%

SsangYong went into receivership again this year, as owners Mahindra could see no way of turning it around.

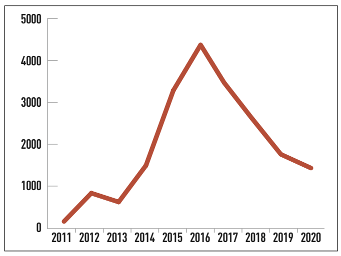
The company is up for sale, but it is hard to imagine what the sales pitch would be: "Low volume car manufacturer with economy brand and high-cost factory seeks new owner" is unlikely to drum up much interest among other car manufacturers.

Meanwhile, it struggles on in the UK, although none of its three models are likely to reach even 1,000 registrations this year. The Rexton has a niche as the last surviving traditional 4x4, but it is hard to discern other points of difference.

Market share



Annual registrations



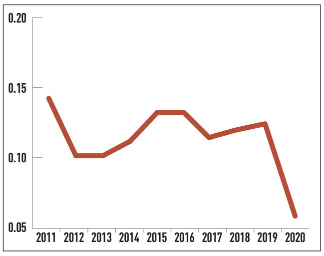
SUBARU

2011 Market share: 0.14% **2021 Market share:** 0.12%

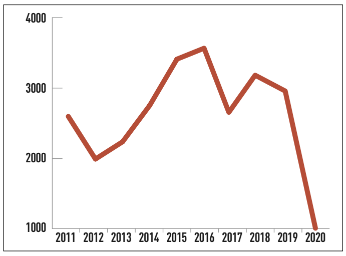
Subaru market share has more than doubled this year, but that is little consolation when the absolute figure is still below 2,000 units.

It is hard to see how Subaru could adapt its models to our tastes. It did develop a unique diesel engine just for Europe, only to see it completely ignored – meaning it is unlikely to change designs for Europe again. Thus the company is in a Catch-22 in the UK. Its models are of little interest to British buyers, and it makes no financial sense to develop models that could be of interest.

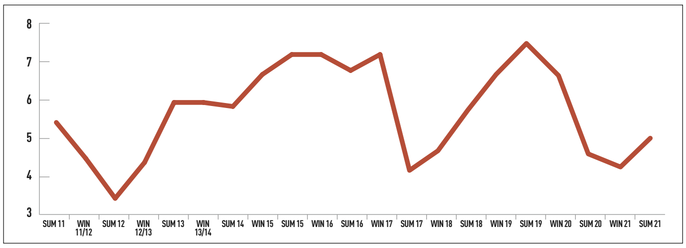
Market share



Annual registrations



NFDA manufacturer rating



SAFE BETS

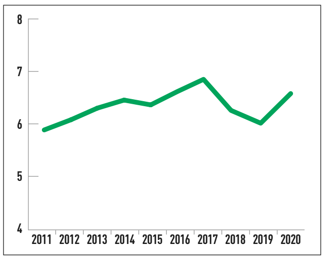
AUDI

2011 Market share: 5.94% **2021 Market share:** 7.30%

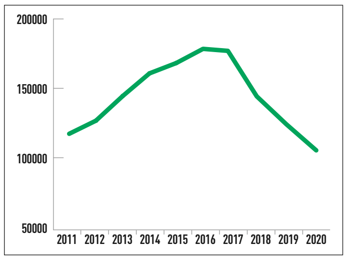
Last year we said Audi would be a brand to watch, as it was finally overcoming its lack of WLTP-homologated models. Moving it to "Safe Bet" simply reflects that it has delivered on that promise – in spades. The A3 has now overtaken the Ford Focus, and every Audi is in the top six in its segment: a remarkable achievement given the sheer number of segments in which Audi competes.

Now that it is the leading German premium brand, room for further growth is naturally more limited. If it can maintain share close to 7.5%, that would still be an excellent achievement.

Market share



Annual registrations



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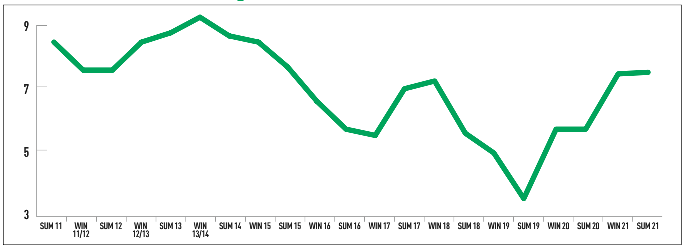
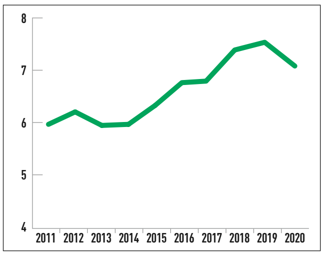


BMW

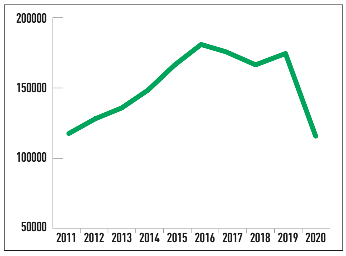
2011 Market share: 5.84% **2021 Market share:** 7.09%

Given the surge in Audi registrations, it is creditable that BMW has still managed to increase share compared with last year, with the rise being led by the 3 Series, the X3 and X5. In fact, the X5 is outselling the 5-Series YTD 2021, which is something of a watershed moment. The car that pretty well defined the executive saloon class for 40 years is now playing second fiddle to its crossover sibling, demonstrating that the SUV bodystyle is now the dominant force in the market.

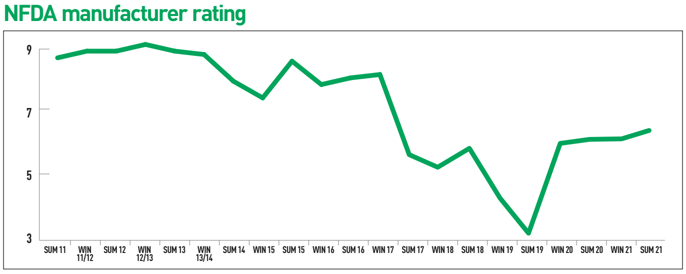
Market share



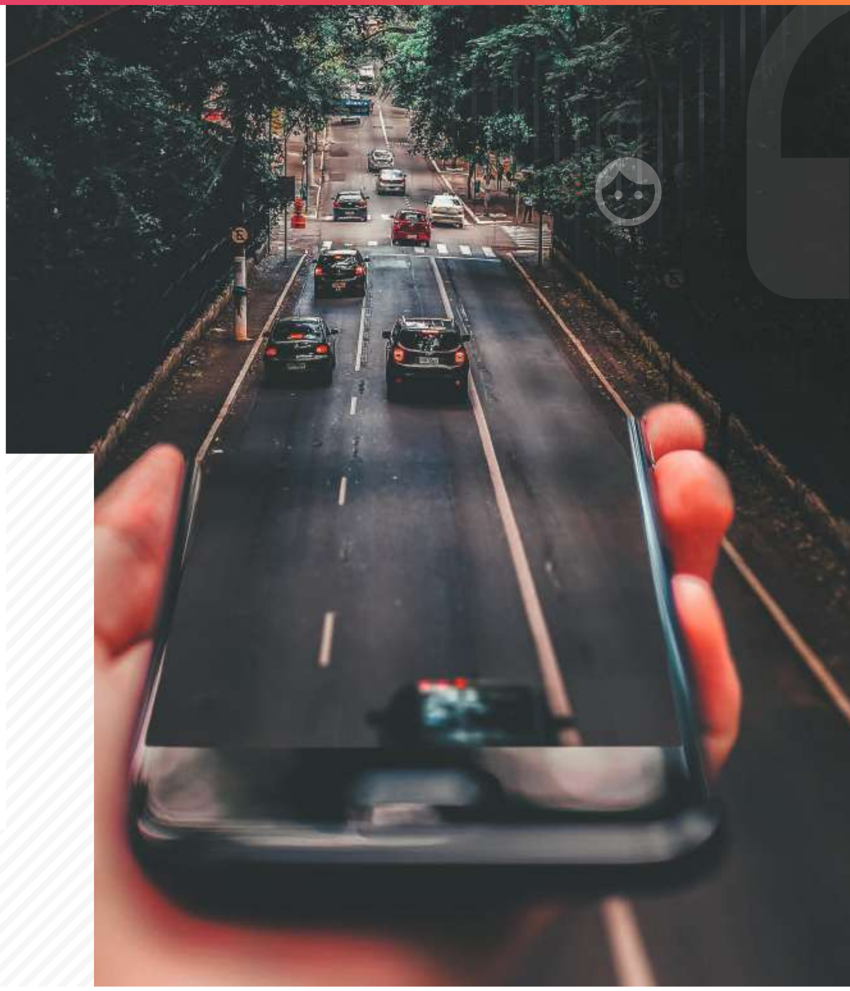
Annual registrations



NFDA manufacturer rating



Why making every call count is key for car dealerships



Sam Hill,
Director of Customer Experience
Infinity

Despite our changing habits as consumers, as we embrace digital channels, many of us still want to experience a face-to-face interaction for that moment when we sign on the dotted line for a new car. A car purchase is a significant financial and emotional investment so being able to see and drive the vehicle, as well as sitting down to discuss the purchase in more detail is important. That's why companies like Nissan have invested huge sums into making their showrooms more experiential – a place where consumers feel looked after, understood and listened to.

Before buyers reach the showroom, however, it's likely that they've carried out a significant amount of preliminary research, either online or by calling a dealership directly.

That phone call can be the turning point on the customer journey. And, it's just as important for potential buyers to feel understood and listened to at that moment as it is when they enter the showroom. In fact, they're unlikely to even make it into the showroom if that call doesn't go well.

48.4% **New car leads that come from phone calls**

According to an AutoTrader market intelligence report, almost half (48.4%) of new car leads come from phone calls. Additional research has also shown that as many as one quarter of those calls end in a sale – demonstrating that the intent to buy is clearly there. But how much untapped potential may still lie in those calls?

There are two key elements that help to maximise the value of every phone call. Firstly, people handling calls need to feel supported and informed, to ensure that they're in the best possible position to get a result when a call comes in. Secondly, by capturing and analysing the conversations that are taking place, and, more importantly, acting upon the insight they reveal, dealerships can make more informed decisions on everything from training to marketing.

Supporting staff

Phone calls contain a wealth of valuable information, and our Conversation Analytics suite can now help businesses access it – enabling them to gain actionable insight at scale, and at speed. Evaluating conversations over time enables automotive dealers to identify multiple performance indicators – from recurring words or phrases in calls where leads go cold, to identifiable patterns within calls that tend to lead to a more positive outcome.

> “Would leather seating be more convenient for you as you have a young family?”

This insight is invaluable for training call handlers, helping them to improve conversion rates, increase average order values, upsell and reduce the cost of conversion.

Dealerships can also test sales scripts, phrasing or promotions before analysing any change in performance. For example: “Would leather seating be more convenient for you as you have a young family?’ rather than: “Would you like to upgrade to leather seating?”

In addition, Conversation Analytics enables the tone of both caller and agent to be monitored, to understand how sentiment fluctuates throughout the call. Dealerships can use this to look at how agents deal with certain situations and where training gaps may lie, as well as the overall customer experience that they’re providing.

It is imperative that whoever answers calls on behalf of the dealer is playing their part in converting the caller into a customer. Intelligence from previous conversations is gold dust when it comes to helping call handlers understand the best course of action for every call they take.

Supporting the wider business

Using this intelligence, dealerships can also build a bank of knowledge that can educate the wider business on which actions are most likely to drive the best results. Insight from calls can be shared with the marketing department, for example, to provide feedback on current promotions and to inform future campaigns.

Conversation Analytics also helps car dealerships to highlight examples of best practice to the customer service team, to help them improve performance and influence their Customer Satisfaction Index score (CSI). Dealerships are under huge pressure to provide excellent customer support on behalf of the automotive brands they represent – and maintaining a CSI score above 95% is often expected. Falling below this can have consequences on the margins or bonus payments that dealers receive for hitting targets.

Keyword spotting can help to identify the regular themes and topics on customer service calls - and reveal where persistent problems might lie - a lack of clarity around warranties or service packages, for example. This empowers dealers to then train customer service staff to deal with these common scenarios – improving both the sales and the after-sales process.

It’s hard to predict whether the Covid-19 pandemic has changed the way we will buy cars in the future. Most people tend to agree that the hybrid model of researching online and buying in the showroom will continue. But, as the economy begins to recover, dealerships must improve conversion rates across every channel. And, the phone call is the bridge between their online and offline tactics.

A greater understanding of why people are calling and whether they are getting what they want can help automotive dealerships create smoother customer journeys, improve loyalty, develop better after-sales support, deliver better staff training and provide the reassurance that the customer needs before they finally make their dream purchase.

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Want to know more about the customer experience trends shaping the automotive industry?

Scan this QR code to download a copy of our eBook on optimising the automotive customer’s experience.

Join brands like Mazda, BMW and Dealeron by unlocking the insights trapped within your calls. You’ll find out how to build a bank of intelligence that will let you drive more profitable customer interactions.

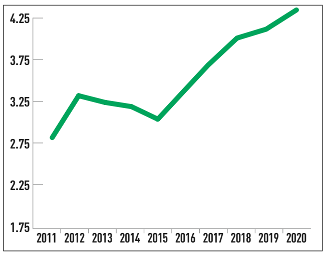
KIA

2011 Market share: 2.78% **2021 Market share:** 5.63%

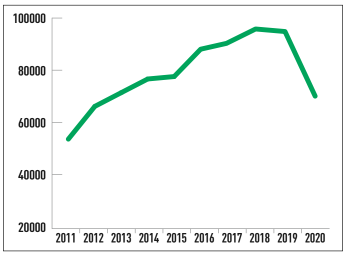
Another year, another market share record, with Kia breaking through the 5% barrier. Its biggest seller is the Sportage, which is the UK's best-selling C-segment crossover this year, outselling even the Qashqai and Kuga. Its second best-seller is the Niro hybrid/plug-in hybrid/battery electric range. Hence the days of Kia mostly selling small cars at low prices are long gone.

Quite how Kia can keep on growing is the only question. Having gorged on the French and Italian brands' lunch, how much more food is left on the table?

Market share



Annual registrations



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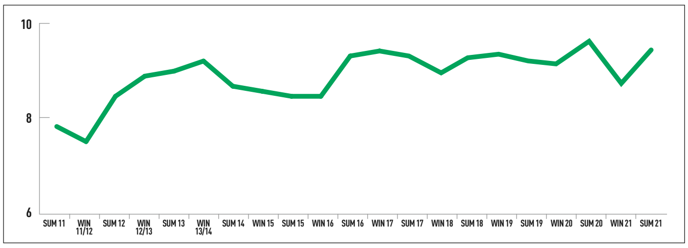


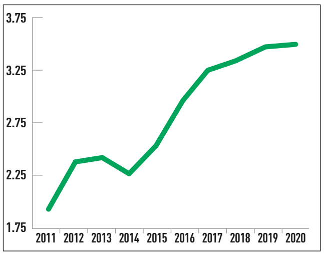
LAND ROVER

2011 Market share: 1.85% **2021 Market share:** 3.50%

Market share has risen slightly this year, mainly thanks to the hugely popular new Defender, which some in JLR refer to as, "the fantastic new Discovery". Of course, that does not leave much room for the actual Discovery, which is Land Rover's slowest selling model. It is now being easily outsold by the Volvo XC90 and Audi e-Tron.

An honourable mention should go to the Range Rover and Range Rover Sport, which are enjoying an Indian summer. Both are seeing a rise in market share, even as the current models come to the end of their lives.

Market share



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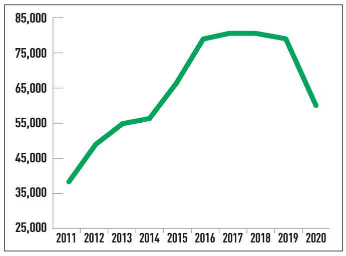

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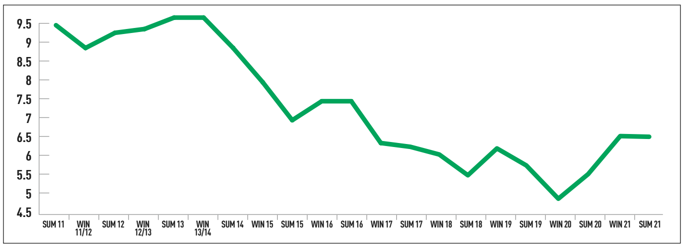


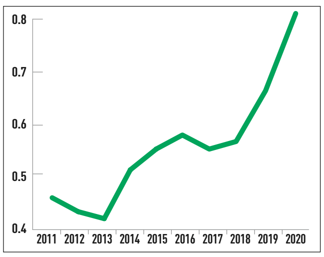
LEXUS

2011 Market share: 0.40% **2021 Market share:** 0.91%

Most people know what Lexus stands for: hybrid powertrains, unimpeachable build quality and great dealers. That consistency and predictability is reflected in the sales performance of its three crossovers. They are all between eighth and tenth in their respective segments – solid but unspectacular performances.

The ES executive saloon drifts along, with sales figures just below the Volvo S90/V90 – but saloons play no part in progressing Lexus in the UK.

Market share



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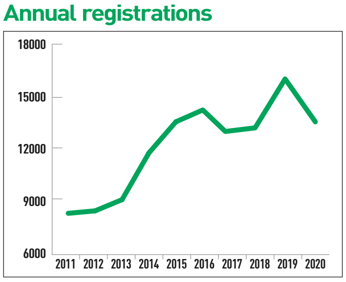

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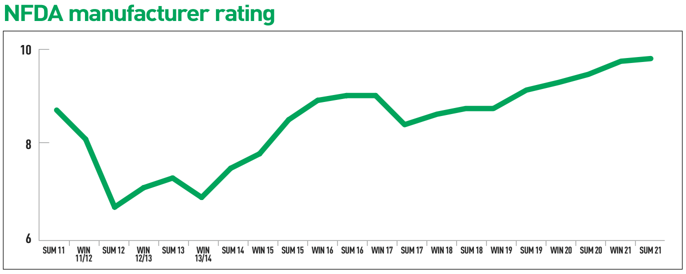


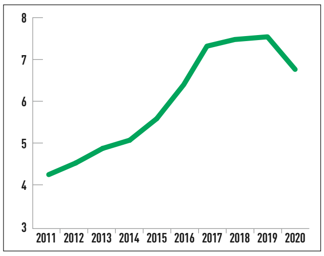
MERCEDES-BENZ

2011 Market share: 4.19% **2021 Market share:** 5.94%

We are so used to the relentless progress of Mercedes in the UK that it is a slight surprise to report that market share has slipped by 1.6 percentage points since its high point in 2019. Not that one should read too much into that, as it is mostly model-cycle related.

The C-Class has lost ground as the old model was on run-out, but it can be expected to bounce back very strongly in 2022. In addition, Mercedes' electric model offensive is starting to gather pace, which will be very significant over the next few years. As a sign of intent, Mercedes has recently bought YASA, a UK manufacturer of ultra-high performance electric motors, so expect electric AMG models to have British motive power.

Market share



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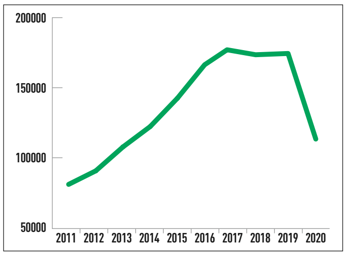

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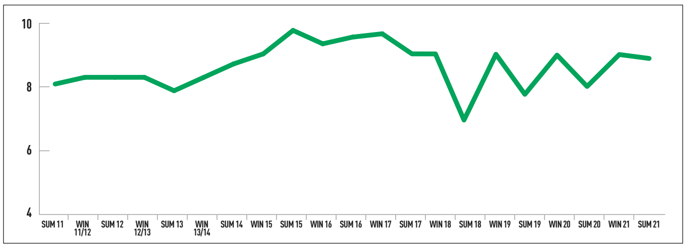


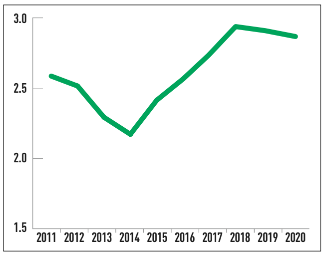
MINI

2011 Market share: 2.46% **2021 Market share:** 2.34%

Mini's market share has been a model of consistency in recent years hovering either side of 2.5%. All three models have increased sales at slightly below the market average in 2021, but there is no reason to think that is more than a random variation.

Certainly, the trend towards premium and electrified small cars should play to Mini's strengths over the coming years.

Market share



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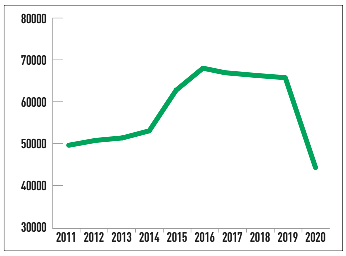

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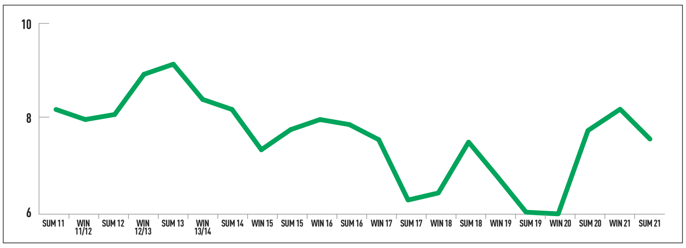


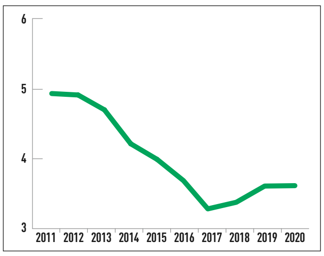
PEUGEOT

2011 Market share: 5.02% **2021 Market share:** 3.51%

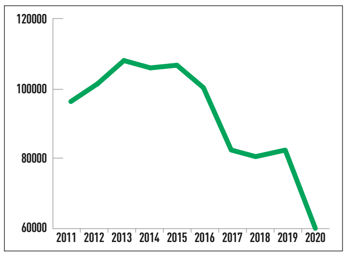
Peugeot's market share has grown slightly in 2021, thanks mostly to the 2008. The B-segment crossover is up to fourth in its class, which is a big step forward. It is now outselling the 208 hatchback, thus establishing itself as Peugeot's best-selling model.

As with most manufacturers, the crossovers (double-0 cars in Peugeot parlance) are doing much better than the traditional 208/308/508 hatchbacks.

Market share



Annual registrations



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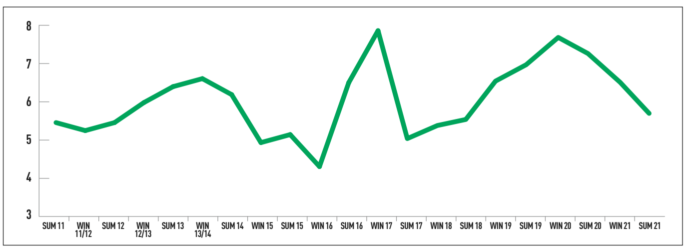


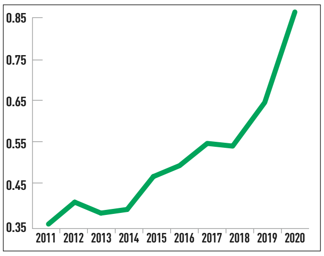
PORSCHE

2011 Market share: 0.30% **2021 Market share:** 0.61%

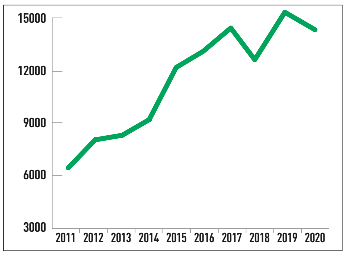
Porsche seems able to regenerate itself almost as frequently as Doctor Who. Until 2002, it was a sports-car brand, and then people gradually got used to the idea that it was a brand whose crossovers enabled it to continue making sports cars. Now, its biggest-selling car in the UK is… an electric luxury saloon. The Taycan is the leading luxury saloon in the UK, and will soon spawn a fully-electric new Macan (the current Macan will continue for those not yet ready to switch to battery power).

Given the remarkable performance of the Taycan, who would bet against the next Macan giving the company another major boost?

Market share



Annual registrations



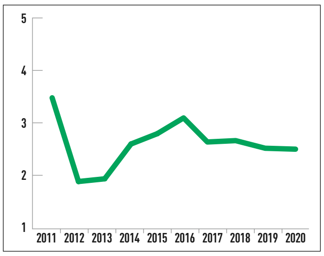
RENAULT

2011 Market share: 3.43% **2021 Market share:** 1.75%

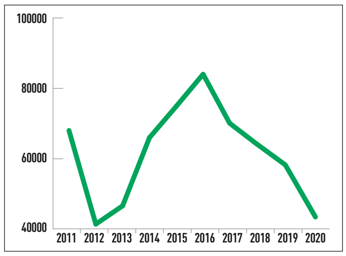
After years of turmoil as Renault collapsed from 7% market share to less than 2%, we thought that Renault had finally begun to stabilise in 2020 at a market share of around 2.5% -3.0%. Wrong. Renault has collapsed again this year: its best-selling model, the Captur, is being outsold by the MG ZS and Seat Arona, and all models have lost market share.

In the (admittedly small) August market, Renault was outsold by value brand subsidiary Dacia: that is like losing a tennis match to your seven-year-old child.

Market share



Annual registrations



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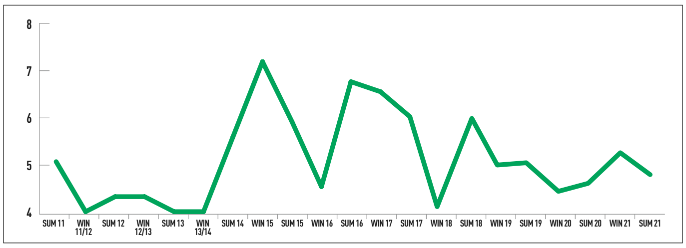


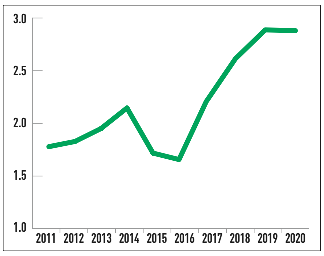
SEAT

2011 Market share: 1.86% **2021 Market share:** 2.86%

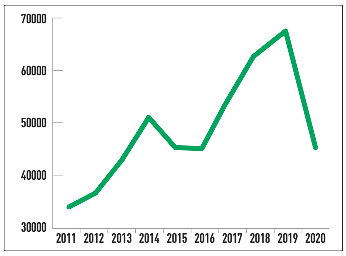
Seat's market share is pretty stable at around 3%. Given that five years ago, Seat was seen as the problem child of the VW Group with a UK market share of 1.7%, that is an excellent result.

The issue Seat faces is how to maintain that market share. It now has a complete range of crossovers, so it is hard to see where future growth will come from. At a strategy presentation last year, Seat said it would start making EVs in volume from 2025 (an Arona-sized crossover coming first). If it keeps to that timetable, it is intending to turn up to the party pretty late – some manufacturers are planning to be all-electric not long after that.

Market share



Annual registrations



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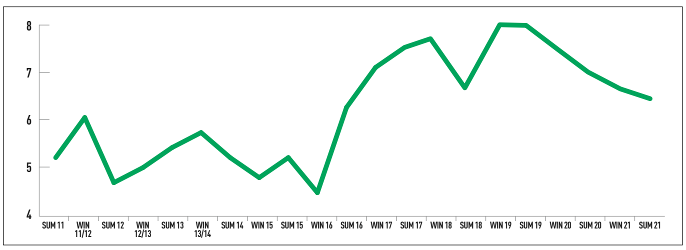


VAUXHALL

2011 Market share: 12.11% **2021 Market share:** 5.49%

Vauxhall's market share now seems to have bottomed out after several years of sharp drops, when Stellantis allowed the Insignia to fade away, and the Astra was left to find its own level. Meanwhile the PSA-platform models are generally doing reasonable business (especially the Crossland which is third in its segment).

The interesting question is what will happen with the next Astra, due shortly. If the Astra could get back to the sales volumes of the Corolla, Vauxhall's share could get back above 6.0%.

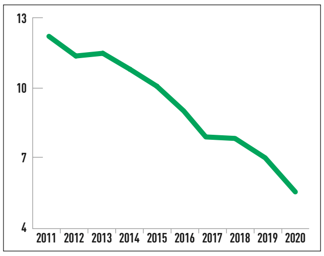
VOLKSWAGEN

2011 Market share: 9.24% **2021 Market share:** 9.21%

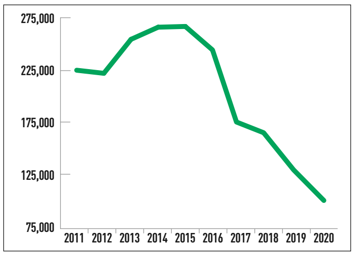
It will be interesting to see how much noise VW makes when the 2021 sales figures are announced next January. It now seems certain VW will take market leadership – the first time that a brand with no manufacturing footprint in the UK has done so. It would have a right to boast, but "Germany takes back control of UK car market" may not be a headline relished by VW.

The growth in share this year has mainly come from the T-Roc and T-Cross and, more surprisingly, the Polo. Most hatchbacks have lost share to crossovers, but the Polo is now up to third in its segment and sixth in the overall market.

Market share



Annual registrations



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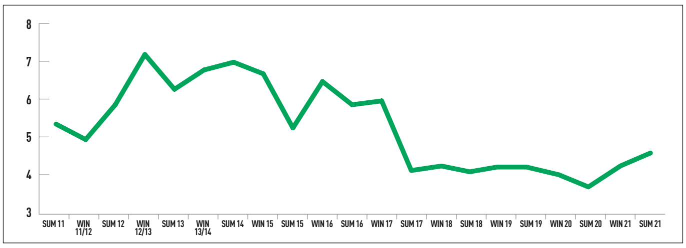
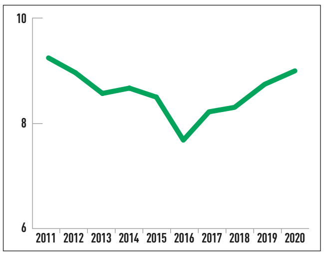
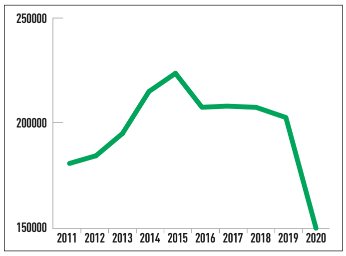


Market share



Annual registrations



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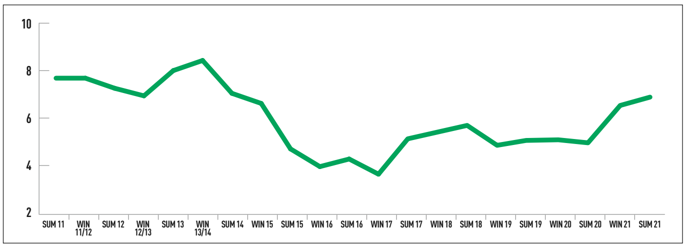


BRANDS TO WATCH

CUPRA

2011 Market share: N/A **2021 Market share:** 0.41%

When mainstream brands launch premium offshoots, it does not always work out (think Nissan-Infiniti or Citroën-DS). However, Seat's new sibling, Cupra, has certainly got off to a storming start. It will probably finish its first full year close to 0.5% market share, so it deserves to be taken very seriously.

The Formentor, which accounts for nearly all Cupra sales, has overtaken the Jaguar E-Pace, and is getting a lot of credit for its combination of style, performance and luxury. If Cupra can follow up with other equally convincing models, VW could have yet another successful brand on its hands.

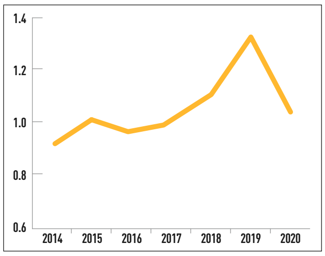
DACIA

2011 Market share: N/A **2021 Market share:** 1.01%

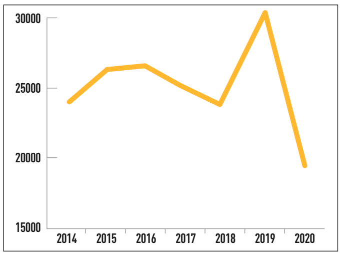
Dacia has fallen sharply YTD (down from 1.32% in 2020), but we would still back it for growth next year. The Sandero has just been replaced, so will recover in 2022, and the Duster has just been facelifted. There will be a seven-seater in 2022 (the Jogger) and the Spring EV may also come to the UK (Dacia is still evaluating profitability of a RHD version).

Dacia will continue to benefit from its position as one of the very few credible value brands left in the market, although that does lead to some unique challenges. Euro NCAP has criticised Dacia's safety ratings, but not because the cars perform any worse in crash tests. Instead, Euro NCAP says Dacia should have more electronic driver aids, rather missing the point that Dacia's competition is frequently used cars that would not have those features either.

Market share



Annual registrations



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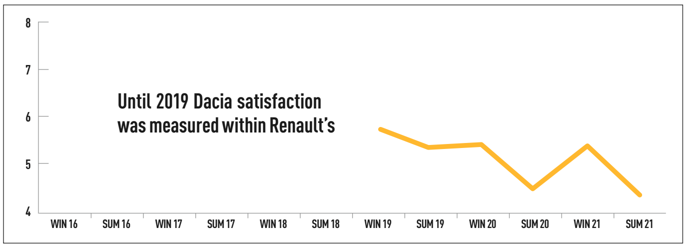


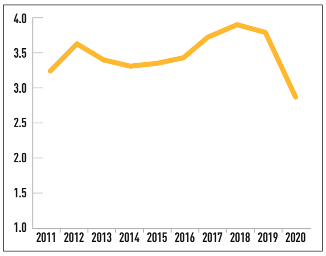
HYUNDAI

2011 Market share: 3.16% **2021 Market share:** 4.02%

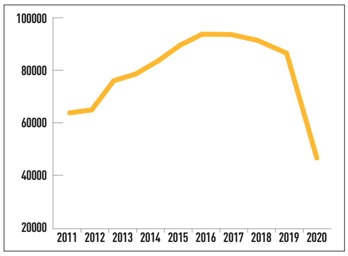
After a terrible couple of years, Hyundai is getting back on track. Registrations are up by 39.9% and, more importantly, they are growing fastest in the most important sectors. Growth is being led by the Tucson and Kona crossovers plus the Ioniq EVs, which are the type of vehicles that have the best long-term growth prospects.

However, there are still major problems. Hyundai sales are still 33% below Kia, when Hyundai is meant to be the senior brand, and Hyundai dealers are still a disgruntled lot. With an overall score of 4.7 in the most recent NFDA survey, Hyundai was ahead of only Fiat/Jeep.

Market share



Annual registrations



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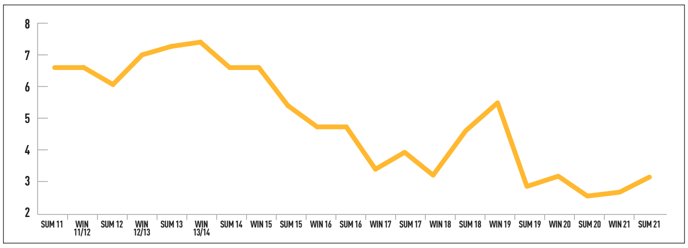


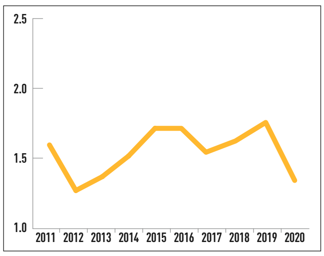
MAZDA

2011 Market share: 1.74% **2021 Market share:** 1.66%

After losing market share in 2020, Mazda has recovered; with the crossovers outperforming the overall market. The CX-30 is Mazda's best seller, offering the company's trademark emphasis on driving dynamics to set it apart.

Mazda continues to follow its own path when it comes to powertrains – another Mazda hallmark since it made its first rotary engine in the 1960s. It is persevering with its unique Skyactiv-X petrol that works like a diesel, but Mazda's bet that batteries should be kept small is looking risky. The MX-30 has a real-world range of barely more than 100 miles and buyers don't seem to want to look past the range figure to understand the claimed benefits in terms of overall environmental impact.

Market share



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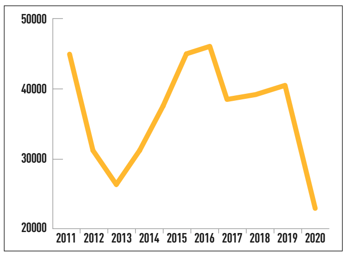

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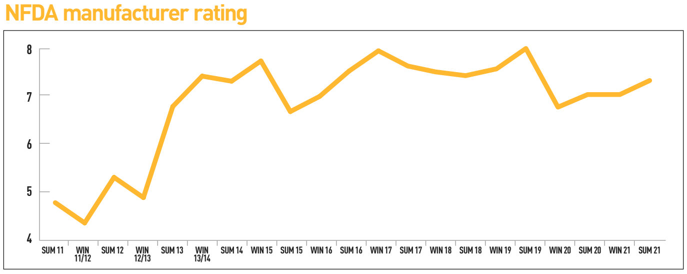


MG

2011 Market share: 0.01% **2021 Market share:** 1.74%

With every passing month's registration figures, MG's progress looks less like a flash in the pan, and more like the establishment of a significant automotive brand. After a stellar year in 2020, growth is up by a further 61%, and the company is now ahead of Honda.

The ZS is an excellent sixth in B-segment crossovers, while the larger HS crossover has got off to a good start in its first full year. It has overtaken the Peugeot 5008 and Honda CR-V, both of which are far better-established nameplates. The MG 5 (strangely, based on the same platform as the previous Vauxhall Astra) is also building up momentum, not least because it offers a family EV with a 200-mile range for £27,000.

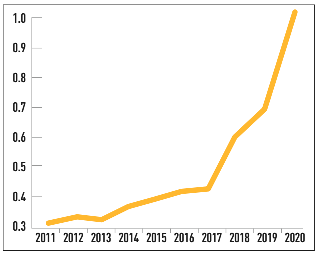
POLESTAR

2011 Market share: N/A **2021 Market share:** 0.18%

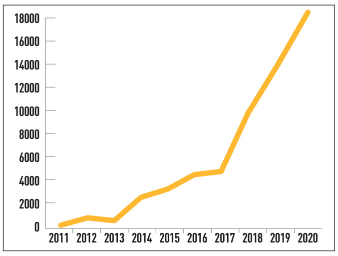
Polestar began as Volvo's official partner to make performance models (like a micro version of AMG and Mercedes), but it is now a fully-fledged manufacturer. Today's Polestar would not have been possible without Volvo's own renaissance: in 2005, a cooler, more stylish alternative to a Volvo would have been a meaningless idea (a beige cardigan would have counted as cooler than a Volvo), but now that Volvo is itself cool, Polestar makes sense.

Certainly the market thinks so: the Tesla Model 3-rivalling Polestar 2 has got off to a good start, and the company is going public with a valuation of £14.7 billion. It expects to be making 290,000 cars per year by 2025 and plenty of investors clearly think that is achievable.

Market share



Annual registrations



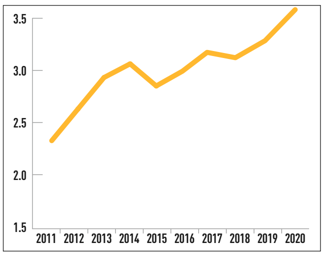
ŠKODA

2011 Market share: 2.34% **2021 Market share:** 3.53%

When VW bought Škoda, it was not hard to imagine that Škoda could become a significant player in B- and C-segment hatchbacks. However, no one could have guessed that it would become a major force in large cars: today the Kodiak is easily the best-selling non-premium large SUV, and the Superb could finish the year as the leading large family car (not the accolade it once was, admittedly).

Škoda does not have a star performer in terms of registrations. Instead, it has strong performers in no less than six segments, which gives it considerable strength in depth. Škoda has skilfully used the VW parts-bin to create a full range of highly competitive products.

Market share



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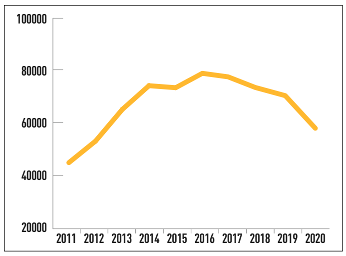

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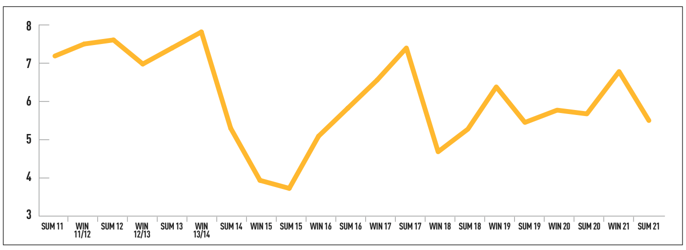


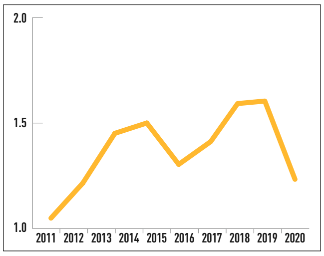
SUZUKI

2011 Market share: 1.09% **2021 Market share:** 1.36%

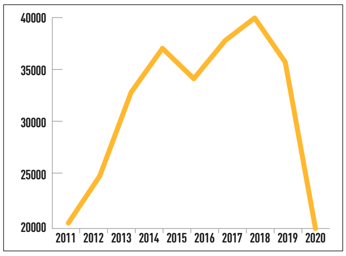
Market share has slightly improved on its 2019 figure (1.33%), thanks mostly to the Vitara, which has been transformed from old-school 4x4 to supermini crossover.

However, the two Toyota models which Suzuki is rebadging – the Swace/Auris and the Across/Rav4 – have barely got out of the starting blocks yet. The models make sense for Suzuki (even if the names don't), but Suzuki dealers now have a £45,000 PHEV crossover to sell. That must be a bit of stretch for dealers used to selling Swift hatchbacks.

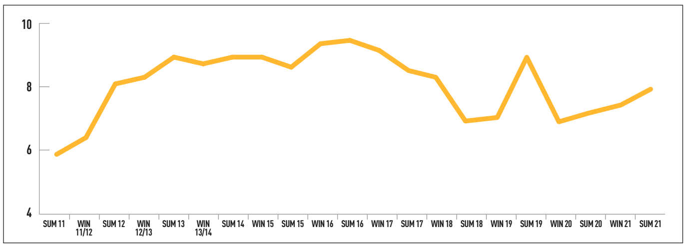
Market share



Annual registrations



NFDA manufacturer rating



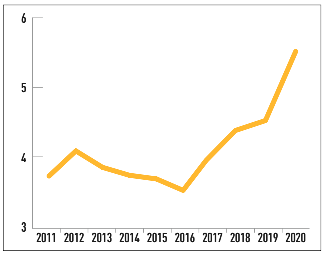
TOYOTA

2011 Market share: 3.74% **2021 Market share:** 6.31%

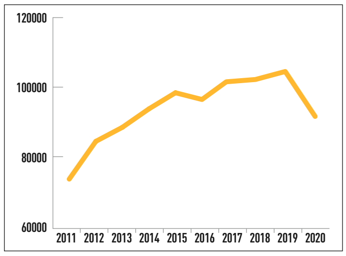
Toyota's market share has passed 6%, making it comfortably the largest Asian brand in the UK. Among such brands, only Nissan has previously achieved that, so Toyota will be pleased to remedy what would have been seen as a bit of an embarrassment. Toyota is the biggest car brand globally and the UK was an outlier in that Toyota frequently played second fiddle to Nissan.

Mainstream Toyotas (Aygo, Yaris, Corolla, CH-R, Rav4) are all comfortably within the Top 10 of their respective segments, but Toyota still has six current models which have sold less than 1,000 units each so far this year, plus two other models below 1,000 sales that are awaiting replacements. That means Toyota has more fringe models in the UK than many manufacturers have total models.

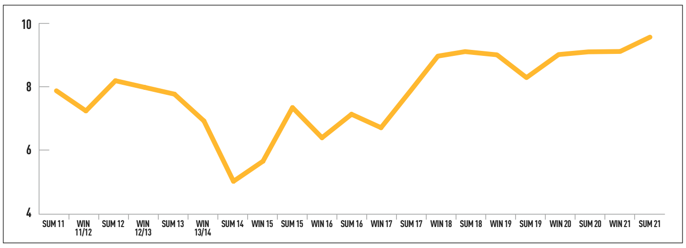
Market share



Annual registrations



NFDA manufacturer rating



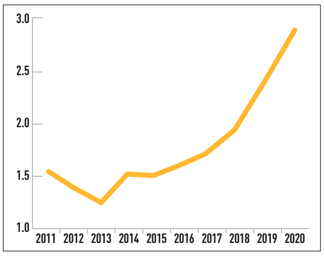
VOLVO

2011 Market share: 1.68% **2021 Market share:** 2.77%

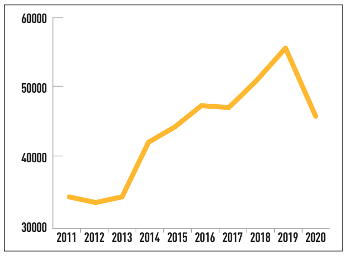
Volvo has achieved record market share this century. It is not the company's highest-ever market share because Britain had a love affair with the Volvo 340/360 in the 1980s and early 1990s that baffled even its manufacturer.

The stars of the show are the crossovers: the XC40 is easily No 1 in its class (ahead of the Evoque), while the XC60 and XC90 are both No 4. Even the big saloons and estates are doing reasonable business – behind the German trio, but well ahead of Lexus, Jaguar, etc.

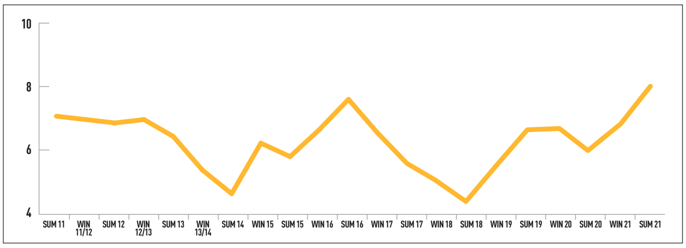
Market share



Annual registrations



NFDA manufacturer rating



A

Allen Ford (Supergroup UK)
Franchises: Ford 20 Ford LCV 8 Kia 4 Maz 1
Key executives: Niall Hooper, group managing director; Paula Wood, group financial director; Richard Arnold, chief operating officer

Ancaster Group
Franchises: Abar 1 AR 1 Dac 1 Fi 2 Hy 4 Jeep 2 Nis 6 Ren 1
Key executives: Stephen Wood, managing director; Simon Hill, operations director; Robert Smith, aftersales director; David Bourne, finance director

Aprite (Westway)
Franchises: Nis 13
Key executives: Jon Roberts, managing director; David Wheatley, finance director; Kevin Gaughan, aftersales director; Sara Harris, marketing director; Alan Rotchell, sales director

Arbury
Franchises: Abar 1 Ci 1 Fi 1 Nis 2 Peu 6 Seat 2 Sko 1
Key executives: Paul Goodwin, managing director; Neil Barrett, finance director; Ben Archer, operations director

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

B

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

BMW Retail (Park Lane)
Franchises: BMW 1 Mini 1
Key executives: Chris Learmonth, managing director; Richard Price, director

Bowker Motor Group
Franchises: BMW 2 Mini 2 Po 1 Other 1
Key executives: Anthony Bowker, chief executive; Thomas Fox, managing director; Andy Gee, finance director

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

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

C

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

Cambria Automobiles
Franchises: Abar 2 AR 1 AM 4 Bn 2 Cit 1 Fi 4 Ford 4 Ho 1 Jag 5 Jeep 1 Lamb 2 LR 4 Maz 3 Mcl 1 Peu 1 RR 1 Suz 1 Vaux 3 Vo 1 Other 2
Key executives: Mark Lavery, chief executive; James Mullins, finance director; Tim Duckers, managing director

CEM Day
Franchises: Fi 1 Fi LCV 1 Ford 4 Ford LCV 1 Iv 1 Nissan 1 Peu 2
Key executives: Graham Day, chairman; Russell Day, managing director; Jill Day, director

Central Garage Uppingham
Franchises: BMW 1 Kia 1 Maz 3 MG 1 Mini 1 Vo 1 Other 2
Key executives: Sam Hamblin, chairman; Graham Wemyss, group general manager; Matthew Riddings, management accountant

Chorley Group
Franchises: Nis 5 MG 2 Kia 1 Hyu 1 Vaux 1
Key executives: Adam Turner, managing director; Pauline Turner, aftersales director; Andrew Turner, chairman; Stacey Turner, legal director

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

Citygate Group
Franchises: Kia 1 Seat 3 Sko 3 VW 5 VW LCV 2
Key executives: Jonathan Smith, chief executive

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

Currie Motors
Franchises: Toy 4 Lex 1
Key executives: Joe Jaffe, chairman; Glenn Pitzer, chief executive; Lee Ferguson, finance director

D

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

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

Donnelly Bros Garages (Dungannon)
Franchises: Abar 1 AR 1 Cit 2 Dac 2 Fi 1 Fi LCV 1 Ho 2 Jag 1 LR 1 Mitsu 2 Peu 3 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, managing director; Malcolm Kerr, company secretary

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

Drive Motor Retail
Franchises: Cit 1 MG 3 Vaux 14
Key executives: Richard Manning, chairman; Stephen Bessex, chairman; Stuart Harrison, managing director; Rob Keenan, managing director

E

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

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

Endeavour Automotive Group
Franchises: Hy 5 Lo 1 Vo 7 Other 3
Key executives: John Caney, chief executive; Andrew Shackleton, finance director; Andrew Dick, director

F

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

Forday Motor Group
Franchises: Ford 4 Ford LCV 2
Key executives: Simon Moulton, managing director; Chris Yoxon, director

G

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

Glyn Hopkin
Franchises: Abar 5 AR 4 Dac 3 Fi 8 Ho 1 Jeep 4 Kia 1 MG 5 Niss 13 Ren 3 Suz 3 Other 2
Key executives: Glyn Hopkin, chairman; Fraser Cohen, managing director; Hady Laba, finance director; Shabir Chowdhury, sales director

Greenhous Group
Franchises: Daf 4 Fi 1 Fo 1 Fo LCV 1 Nis 1 Vaux 1 VW LCV 1
Key executives: Derek Passant, chief executive; Mike Pawson, finance director

Group 1 Automotive
Franchises: Au 9 BMW 9 Fo 6 Jag 4 Kia 2 LR 4 MB Car 5 Mini 9 Seat 1 Sko 2 Sm 3 Toy 2 VW 8 Other 1
Key executives: Earl Hesterberg, chief executive; Mark Bridgland, operations director; Daniel McHenry, chief financial officer

H

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

Hartwell
Franchises: Fi 2 Ford 10 Ford LCV 4
Key executives: Kevin Godfrey, managing director; Andrew Lemon, finance director; Atiq Rehman, director

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

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

Hatfields
Franchises: Jag 5 LR 4
Key executives: Gareth Williams, managing director; Philip Bennett, head of finance; Craig Petty, sales director; Stuart Baldwin, group service director; Kevin Walter, group parts manager

Helston Garages Group
Franchises: Au 1 BMW 5 Fer 1 Jag 3 LR 4 Mini 5 Peu 5 Po 1 Sko 4 VW 2 VW LCV 2 Vo 5
Key executives: David Carr, co-owner; Betty Carr, co-owner; Andrew Barrett, managing director; Craig Glanville, financial director; Sarah Hurley, director

Hendy Group
Franchises: Dac 8 Fo 11 Fo LCV 6 Ho 4 Hy 2 Iv 3 Jag 2 Kia 5 LR 3 Lex 1 Lo 3 Maz 5 MG 3 Nis 2 Nis LCV 1 Ren 8 Seat 1 Sko 2 Suz 1 Toy 3 Other 2
Key executives: Paul Hendy, chief executive; Jonathan Moritz, chief financial officer; Simon Bottomley, chief operating officer

Heritage Automotive
Franchises: Au 2 Ho 1 SEAT 2 Sko 4 VW 6 VW LCV 2 Other fr 9
Key executives: Paul Hrachovec, managing director; Richard Neulander, director; Nick Hinallas, director

Howards Group
Franchises: Cit 2 DS 1 Ho 2 Hy 4 Lo 1 Kia 1 MG 2 Nis 1 Peu 4 Suz 1 Toy 1
Key executives: Peter Coleman, chairman; Peter Hayes, managing director; David Backes, finance director

HR Owen
Franchises: AM 2 Bn 4 Bug 1 Fe 2 Lamb 4 Mas 2 RR 1 Other 3
Key executives: Ken Choo, chief executive; Manish Patel, finance director

I

Inchcape
Franchises: Au 5 BMW 5 Jag 5 LR 6 Lex 5 MB Car 12 MIN 5 Por 2 Sm 8 Toy 8 VW 13 VW LCV 1
Key executives: James Brearley, chief executive; Stephen Hill, chief financial officer; Louise Manzano, HR director

J

Jardine Motors Group
Franchises: AM 2 Au 12 BMW 2 Fe 2 Jag 5 Lamb 1 LR 6 Mas 1 McL 2 MB Car 5 MIN 2 Por 4 Sm 3 Other 1
Key executives: Neil Williamson, chief executive; David Muir, finance director; Clare Martin, HR director

JCB Group
Franchises: Cit 1 Dac 2 Hon 1 Kia 2 MB LCV 1 Ren 2 Seat 2 Sko 2 Ssy 1 Suz 1 VW 2 VW LCV 5 Other 1
Key executives: Jonathan Bischoff, managing director

JCT600
Franchises: AM 1 Au 7 Ben 2 Cit 1 Fer 2 Kia 1 LR 1 Lo 1 Mas 1 Maz 2 MB Car 5 MG 1 Peu 2 Po 4 RR 1 Seat 3 Sm 2 Vaux 2 VW 5 VW LCV 3 Other 2
Key executives: John Tordoff, chief executive; Ian Tordoff, director; Nigel Shaw, finance director; Richard Hargraves, managing director

Jemca Car Group
Franchises: Lex 4 Toy 7
Key executives: Hiroyuki Niwa, chairman and chief executive; David Collis, president; Gary Brown, chief finance officer; Simon Boxall, chief operating officer

John Clark Motor Group
Franchises: Au 2 BMW 2 Dac 1 Jag 6 LR 7 Mini 2 Nis 1 Ren 1 Seat 2 Sko 3 VW 3 VW LCV 2 Vo 2 Other 4
Key executives: John Clark, chairman; Christopher Clark, managing director; Alan McIntosh, finance director; John O'Hanlon, non-exec director; John Murray, Non-exec director; Richard North, non-exec director

John Grose Group
Franchises: Cit 1 DS 1 Ford 4 Ford LCV 1 Kia 1 Peu 1
Key executives: Ian Twinley, chairman; Richard Howard, managing director; Pete Smith, finance director; David Billison, sales director

Johnsons Cars
Franchises: Abar 2 AR 2 Fi 2 Ford 1 Ho 4 Hy 6 Jeep 2 Lex 1 Maz 5 SEAT 4 Sko 3 Toy 3 VW 8 Vo 2 Other 2
Key executives: Martin Sumner, managing director; Mike Berwick, operations director; Richard Martin, finance director; Jonathan Dale, IT director; James Dale, director

L

Listers
Franchises: Au 4 BMW 2 Ho 3 Isz 1 Jag 2 LR 3 Lex 3 MB Car 4 Mini 2 Po 1 Seat 2 Sko 2 Sm 2 Toy 7 VW 7 VW LCV 2 Vo 1 Other 2
Key executives: Keith Bradshaw, chairman; Terence Lister, managing director; Geoffrey Lister, chief executive; Timothy Bradshaw, chief operating officer; Antony Dadd, director of finance

Lloyd Motors
Franchises: BMW 6 Jag 2 Kia 1 LR 4 Mini 6 Vo 1 Other 2
Key executives: Brian Lloyd, managing director; Samuel Lloyd, director

Lookers
Franchises: AM 1 Au 13 BMW 3 Bn 1 Dac 6 Cit 1 DS 1 Fe 1 Ford 10 Ford LCV 6 Ho 1 Hy 1 Jag 4 Jeep 1 Kia 4 LR 11 Lex 1 Mas 1 MB Car 14 MIN 3 Niss 8 Peu 1 Ren 7 SEAT 2 Sko 4 Sm 9 Toy 3 Vx 10 VW 13 VW LCV 5 Vo 3 Other 5
Key executives: Mark Raban, chief executive; Phil White, chairman; Phillip Kenny, general counsel and company secretary; Paul Bentley, retail operations director

LSH Auto UK
Franchises: MB Car 7 MB LCV 3 Sm 3
Key executives: Martyn Webb, managing director; Masim Syed, chief financial officer; Ian Williams, head of HR; Norman McKeown, head of IT

M

Marriott Motor Group
Franchises: Au 3 Dac 1 Ren 1 Sko 1 VW 4 VW LCV 2
Key executives: Paul Barnard, managing director; Ian Woodward, operations director; Steven Bridges, finance director

Marsh Wall
Franchises: BMW 3 Mini 2
Key executives: Wayne Berry, managing director; Deborah Lowles, finance director; John Naylor, non-exec director

Marshall Motor Holdings
Franchises: Au 10 BMW 5 Fo 2 Fo LCV 4 Ho 7 Jag 7 Kia 2 LR 9 MB Car 9 MB LCV 4 MB Truck 4 Mini 4 Nis 3 Peu 3 Seat 4 Sko 12 Sm 2 Vaux 2 VW 15 VW LCV 6 Vo 9 Other 6
Key executives: Daksh Gupta, chief executive; Richard Blumberger, chief financial officer; Jo Moxon, HR director; Jamie Crowther, operations director; Jon Head, commercial director; Stephen Jones, group counsel and company secretary

Mercedes-Benz Retail Group
Franchises: MB Car 9 MB LCV 2 Sm 7
Key executives: Angela Shepherd, chief executive; Paul Sames, director

Mon Motors
Franchises: Au 3 Fo 3 Ford LCV 1 Seat 1 Sko 1 VW 2
Key executives: Jeffrey Cleverly, chairman; Gavin Cleverly, managing director; Roger Moore, finance director; Gareth Cleverly, director

Motorline
Franchises: Au 3 Hy 7 Lex 6 Mas 1 Nis 8 Peu 4 Sko 3 Toy 13 VW 4
Key executives: Glenn Obee, chairman; Thomas Obee, chief executive; Gary Obee, operations director; Tim Humphries, finance director; Tim Murphy, operations director

Motus UK (incl. Pentagon Group)
Franchises: Cit 2 Dac 2 Ford 3 Ford LCV 1 Kia 1 Maz 1 Mits 1 Niss 1 Peu 4 Ren 2 SEAT 4 Sko 3 Toy 1 Vx 11 Vx LCV 6 Other 29
Key executives: David Peel, managing director, Pentagon; Rob Truscott, chief executive Motus Group UK; Andrew Welch, chief financial officer; Lee Seward, managing director, Motus Truck & Van

O

Ocean Automotive (Portsmouth and Yeovil Audi)
Franchises: Au 2 Vo 1
Key executives: David Kelly, chairman; Gail Ninnim, managing director

P

Park's Motor Group
Franchises: Abar 1 BMW 3 Bn 1 Cit 1 Dac 6 Fi 3 Ford 4 Ford LCV 3 Ho 4 Hy 2 Jag 2 Kia 3 Lamb 1 Lo 1 LR 2 Mas 1 Maz 2 McL 2 MG 1 Mini 3 Mits 2 Niss 3 Peu 2 Ren 6 Sko 1 Suz 3 Toy 1 Vo 1 Other 1
Key executives: Douglas Park, chairman and managing director; Alasdair Noble, finance director; William Cumming, aftersales director; Graeme Park, director; Ross Park, director

Parkway Derby
Franchises: VW 4 VW LCV 2
Key executives: Sean Booth, managing director

Partridge of Hampshire
Franchises: BMW 1 Mini 1
Key executives: Toby Partridge, managing director

Pendragon
Franchises: AM 3 BMW 7 Cit 11 Dac 6 Daf 3 DS 2 Fer 1 Fo 39 Hy 2 Jag 5 Kia 2 LR 5 MB Car 8 Mini 7 Nis 4 Peu 4 Po 6 Ren 6 Sm 3 Vaux 20 Others 2
Key executives: Bill Berman, chief executive; Martin Casha, chief operating officer; Mark Willis, chief financial officer; Kim Costello, chief marketing officer; Ian Filby, chairman

Peoples
Franchises: Ford 6 Ford LCV 3
Key executives: Brian Gilda, chairman and managing director; Stewart Ramsay, finance director

Perrys Group
Franchises: Abar 1 Cit 4 Fo 7 Fo LCV 4 Hy 1 Kia 5 Maz 7 MG 3 Peu 7 Seat 3 Vaux 13 Vaux LCV 1 Other 1
Key executives: Darren Ardron, managing director; Richard Ingram, chairman; Ken Savage, commercial director; Denise Millard, chief executive; Neil Taylor, finance director

Peter Vardy
Franchises: BMW 1 Jag 1 LR 1 Mini 1 Po 2
Key executives: Peter Vardy, chief executive; Sir Peter Vardy, chairman; Colin McLellan, chief financial officer

Porsche Retail Group
Franchises: Po 5
Key executives: Adam Flint, managing director; Andrew Coates, head of finance

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

PSA Retail UK
Franchises: Cit 17 DS 6 Peu 24 Vaux 7
Key executives: James Weston, chief executive; Simon Lawrence, chief financial officer; Bryn Thomas, finance director; Richard Garbutt, sales director; Simon Tarrant, aftersales director

R

Renault Retail Group
Franchises: Dac 15 Niss 2 Ren 15 Other 4
Key executives: Ludovic Troyes, managing director; Scott Kilbourne, finance director; Rachel Manley, HR director

Richmond Cars
Franchises: Hyu 3 Sko 2 MG 3 Suz 4 Cit 1
Key executives: Michael Nobes, chief executive; Sam Nobes, operations director

Riverside Motors Group
Franchises: Ho 1 Seat 1 Vo 3 Other 1
Key executives: Mark Denton, managing director; Stephen Wright, operations director

RRG Group and Norton Way Motors
Franchises: Ho 3 Kia 3 Lex 2 Maz 2 Nis 2 Peu 3 Sko 3 Toy 11 Other 3
Key executives: Toru Masuyama, chairman Marubeni Auto Investment UK; Arran Bangham, vice-chairman RRG Group; David Grainger, managing director Norton Way Motors

Rybrook Holdings
Franchises: Ben 1 BMW 4 Jag 1 Lam 1 LR 3 Lo 1 Mcl 2 Mini 4 Por 1 RR 1 Vo 4 Other 1
Key executives: Henry Whale, chief executive; Peter Whale, chairman; Jatinder Nurpuri, finance director

S

Sandicliffe Motor Group
Franchises: Ford 3 Ford LCV 2 Maz 3 Nis 2
Key executives: Andrew Woodhouse, chairman; Paul Woodhouse, managing director; Nicholas Woodhouse, Company secretary; Tom Barton, director

Sandown Motors
Franchises: MB Car 6 Sm 3
Key executives: Gavin McAllister, managing director; Gareth Copling, group financial director

SG Petch
Franchises: Abar 3 AR 1 Fi 3 Fi LCV 1 Hy 3 Is 1 Jeep 1 Kia 3 Mas 3 Nis 1 Peu 1 Peu LCV 1 Seat 2
Key executives: Steve Petch, managing director; Samantha Petch, sales and marketing director; Shaun Burke, sales director; Andrew Hodgson, aftersales director; Simon Rees, finance director

Sinclair Group
Franchises: Au 2 Jag 1 LR 2 MB 4 Seat 1 Sko 1 Sm 1 VW 6 VW LCV 2 Other 1
Key executives: Gerald Sinclair, chairman; Andrew Sinclair, managing director; Jonathan Sinclair, director

Snows Motor Group
Franchises: Abar 4 AR 1 BMW 2 Fi 4 Jeep 2 Kia 3 Lex 2 Maz 2 MB LCV 1 Mini 2 Peu 5 Seat 7 Toy 8 VW LCV 1 Vo 2 Other 4
Key executives: Stephen Snow, chairman and chief executive; Neil McCue, chief operational officer; Alex Domone, chief operational officer; Shawn Gates, chief financial officer

Specialist Car Group
Franchises: BMW 3 Mini 3
Key executives: Clive Fletcher, managing director; Clive James, finance director; Michael Donovan, aftersales director; Julian Bourne, director and head of business

Stephen James Group
Franchises: BMW 5 Mini 3
Key executives: Richard Ennis, managing director; Peter Williams, finance director

Steven Eagell
Franchises: Lex 6 Toy 22
Key executives: Steven Eagell, chief executive; Gary Smith, managing director; David Sherriff, finance director; Bryan Portsmouth, operations director

Stoneacre Motor Group
Franchises: Abar 10 AM 1 AR 4 Cit 2 Dac 6 Fi 20 Fi LCV 1 Ford 7 Ford LCV 2 Ho 3 Hy 2 Jeep 5 Kia 5 Lex 2 Maz 5 MG 6 Mits 3 Niss 1 Peu 7 Ren 6 SEAT 4 Suz 11 Toy 7 Vx 2 Vo 8 Other fr 4
Key executives: Richard Teatum, chairman; Shaun Foweather, managing director; Nigel Wood, finance director; Gerry George, aftersales director; Philip Wade, franchise and development director

Swansway Garages
Franchises: Au 6 Ho 2 Jag 1 LR 1 Peu 1 Seat 1 VW 3 VW LCV 4 Other 1
Key executives: Michael Smyth, chairman; Peter Smyth, director; David Smyth, director; John Smyth, director; Richard Marsland, finance director

Sytner
Franchises: AM 1 Au 14 Ben 4 BMW 16 Fer 4 Jag 6 Lamb 3 LR 11 Mas 4 Mcl 1 MB Car 14 Mini 16 Po 7 RR 2 Seat 3 Sko 1 Sm 9 VW 3 VW LCV 2 Vo 2 Other 1
Key executives: Darren Edwards, chief executive; Adam Collinson, chief financial officer; Melvin Rogers, HR director

T

TC Harrison Group
Franchises: Fo 7 Ford LCV 3 Other 6
Key executives: Christopher Cornell, chief executive; James Harrison, chairman; William Harrison, joint deputy chairman; Jonathan Harrison, joint deputy chairman; Tim Simcox, finance director and company secretary

TG Holdcroft
Franchises: Dac 2 Ho 5 Hy 7 Maz 2 MG 3 Mitsu 1 Nis 3 Ren 2 Vo 1
Key executives: Darren Holdcroft, managing director; Neil Rudge, operations director; Martin McCormick, finance director

Thurlow Nunn
Franchises: Vaux 11 Peu 1
Key executives: Will Tew, managing director; Ashleigh Lewis, chief financial officer; Simon Grylls, sales director

Toomeys
Franchises: Cit 2 Dac 2 DS 1 MG 1 Niss 2 Peu 2 Ren 2 Vx 2 Vx LCV 2
Key executives: Michael Toomey, director; Jonathan Brook, director; Paul Plant, director

TrustFord
Franchises: Fo 67 Fo LCV 15
Key executives: Stuart Foulds, chairman and chief executive; Stuart Mustoe, finance director; John Leeman, operations director; Sharon Ashcroft, HR director; Julia Greenhough, marketing director

V

Vantage Motor Group
Franchises: Cit 1 Kia 1 Lexus 2 Sko 1 Toy 9
Key executives: Phil White, chairman; Andrew Mallory, operations director; Tim Swindin, finance director

Vertu Motors
Franchises: Au 1 BMW 5 Cit 6 Dac 8 DS 1 Ford 21 Ford LCV 1 Ho 14 Hy 12 Jag 6 Jeep 1 Kia 3 LR 6 Maz 2 MB Car 7 MB LCV 1 MG 2 Mini 5 Mitsu 2 Niss 11 Peu 7 Ren 8 Seat 5 Sko 4 Sm 2 Suz 1 Toy 1 Vx 14 Vx LCV 1 VW 10 VW LCV 1 Other fr 5
Key executives: Andy Goss, non-exec chairman; Robert Forrester, chief executive; David Crane, chief operating officer; Karen Anderson, chief financial officer

Vindis Group
Franchises: Au 5 Ben 1 Seat 1 Sko 2 VW 4 VW LCV 2 Other 2
Key executives: Jamie Vindis, managing director; Gary Vindis, chairman; Stephen Fossey, finance director; Peter Toop, sales director

Vines Group
Franchises: BMW 3 Mini 3 Other 1
Key executives: Sean Kelly, managing director

Vospers
Franchises: Abar 3 AR 1 Fi 3 Fi LCV 3 Fo 3 Fo LCV 3 Jeep 1 Maz 3 Nis 1 Nis LCV 1 Peu 2 Peu LCV 1 Ren 1 Seat 1
Key executives: Peter Vosper, chairman; Nick Vosper, managing director; Jonathan Tremain, sales director; Neil Tickner, aftersales director; Mark Haslam, contact and communications director; Paul Rogers, finance director

VT Holdings
Franchises: Abar 1 Dac 1 Fi 1 Hy 2 Kia 5 Maz 1 Nis 5 Peu 1 Ren 1
Key executives: Tim Bagnall, director; Koichi Yoshida, director; Mark Pardoe, director; Chris Wiseman, director

W

William Morgan Group
Franchises: BMW 2 Mini 2 Other 2
Key executives: William Lefevre, managing director

Williams Motor Company
Franchises: BMW 5 Jag 1 LR 1 Mini 5 Other 1
Key executives: Margaret Orton Williams, chair; William Adams, managing director; Michael Sherwin, non-exec director

Y

Yeomans
Franchises: Cit 4 DS 1 Ho 4 Hy 1 Niss 4 Peu 3 Toy 3 Vaux 1 Other 1
Key executives: James Smith, chairman and managing director; Kevin Newitt, operations director; David Hamilton Brown, director

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

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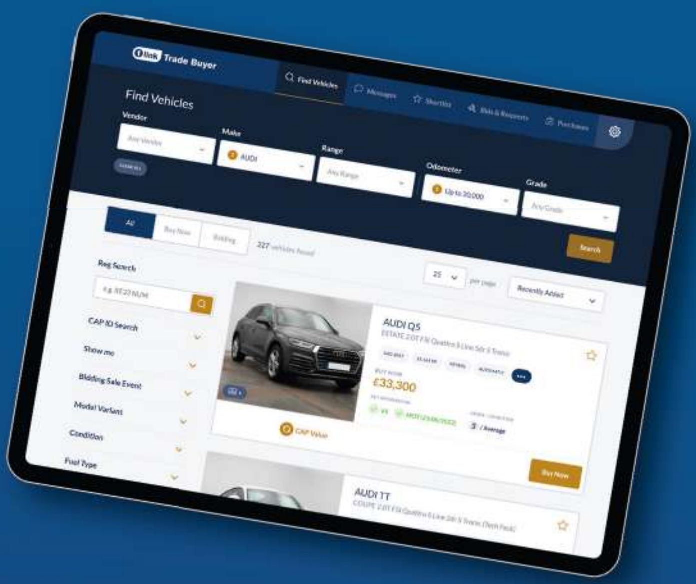

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VIEW FROM THE TOP

AM asked a selection of automotive retail CEOs and MDs from a variety of groups and businesses for their views on the current climate and what they expect is on the horizon in 2022

HOW PLEASED WERE YOU WITH YOUR GROUP'S 2020 TRADING PERFORMANCE?

Stephen Snow (SS), chairman and CEO, Snows: We were delighted with our 2020 trading performance. Clearly our key focus for 2020 was how we responded as a business to the COVID-19 pandemic. We took swift and decisive actions to reassess our activities and processes to ensure our ongoing liquidity.

In retrospect, it is astonishing to think how we closed our business at such short notice.

Communication was the key – with our colleagues, with our customers, and communication with our partners. More specifically, we looked at our cost base, worked out our COVID protocols and decided to embark on our digital strategy.

Stuart Foulds (SF), chairman and chief executive, TrustFord: Given the restrictions we had to work under, with two lockdowns and showrooms closed, our headline performance was more than acceptable with a PBIT well in excess of £10 million.

The problem we faced, however, was interest charges of more than £15m due to new car and CV stock effectively being locked down and unsold, taking our overall result into the red.

All that said, sales of both new and used car and CV accelerated in the second half to unprecedented levels as did our aftersales departments. So, 2020 really was a tale of two halves and while we closed the year back in lockdown we were well set to come into 2021 really 'match fit'.

Drive Motor Retail Group joint managing directors, Rob Keenan (RK) and Stuart Harrison (SH): Overall, we were very happy with our 2020 performance. The year started extremely positively with a strong first quarter performance. Although

March brought some significant challenges with the closure of our sites in response to the UK lockdown, we responded quickly and had a very strong end to April and May, leaving us in a positive position.

After a few weeks of disruption, we developed our sales strategy into an omnichannel experience and were able to re-open workshops relatively quickly with bodyshops opening soon after.

This meant business picked back up and we were able to benefit from the pent-up demand and the implementation of our improved, streamlined processes by the end of Q2, putting us back on track for a profitable and successful year.

Robin Luscombe (RL), managing director, Luscombe Suzuki & MG Leeds: Our 2020/2021 financial year ending May 2021 was the best by some margin, even if we took the Government support away, it was still substantially better than our previous best ever, so we are delighted.

The entire team adapted quickly to changes and we saw the opportunities in April/May 2020 moving to selling cars over email and phone from website leads, and it was very successful, and still is, although maybe less than 5% are completely online, all other sales are a blend of reputation, repeat, web, etc.

Graeme Potts (GP), CEO, Eden Motor Group: I am very pleased overall given the severe limitations of the lockdowns. Once restrictions were eased, customers returned in considerable numbers, and while the activity didn't match original full-year expectations, some of the impact of lockdown was recovered.

Fundamental to this outcome was the flexibility, enthusiasm, and professionalism of our colleagues, who performed extremely well in very trying circumstances.

Clive Brook (CB), managing director of Clive Brook Volvo: We were utterly delighted given 2020 was the best year we have ever had. The company showed growth in virtually every area and, while we were profitable, it wasn't down to Government support. We lost everything we had made in the first quarter of 2020 when we closed the business for a very short period in March.

It was a very dark time for me personally. I was staring at the potential of going bust. We didn't know what was ahead of us and we had started

STEVEN SNOW, SNOWS

the year extremely well. To produce the result we did from the reopening in April until the end of the year, was fantastic. In percentage terms, it was probably nearly double our previous best year in 2008/09.

Perhaps we perform surprisingly well under adversity.

TELL US ABOUT WHAT INITIATIVES OR DEVELOPMENTS REALLY HELPED DRIVE THAT ACHIEVEMENT?

SS: Ongoing communication with our colleagues was critical to ensure everybody understood the decisions and direction we were taking. Another positive side-effect of the crisis was we did revaluate what we were doing and why.

Tangibly the biggest step forward we took was the digitalisation of our marketing. We quickly transformed our online marketing enabling customers to secure their next vehicle through Snows whether by cash purchase, HP, PCP or deposit.

Year-to-date we have seen used sales numbers improve by 34%. We have also seen an 8% increase in customers using our digital platform.

SF: One of the real backbones within TrustFord has been our 'NOW' initiative which was launched in 2017.

This process of being able fulfil a new or used sale within one hour meant we were already expert in completing the sale end-to-end online, seamlessly delivering a car or CV to our customers quickly, efficiently and with a 'wow' factor.

Our 'service NOW' initiative also really came into its own on two counts. First, the ability for any customer to turn up at any of our locations unannounced and have their car serviced, start to finish within one hour, and then extending this via our mobile service fleet offering to service the customer's car at either their place of work or at their home location.

This has been very successful and continues today.

RK/SH: Ultimately, our ability to respond quickly and our team's passion and drive helped us successfully manoeuvre through the challenges of 2020. The implementation of our omnichannel sales and aftersales processes meant that, despite dealerships closing for much of 2020, our performance quickly picked back up from mid-April onwards.

We were also able to accurately monitor our enquiries better than ever before, ensuring they were responded to and followed up in a timely manner. By investing in our contact centre and enquiry management software (for both online and telephone enquiries), we maximised all opportunities and transformed our contact centre into a sales centre.

RL: The new website launched in March 2020 after a year in development gave potential car buyers more information and a better user experience. The trust, confidence and transparency it creates, mixed with staff who adapted quickly to forced changes, enabled us to be profitable every month from May 2020.

GP: Growth in our online selling capability and click-and-collect fulfilment, which predated the COVID lockdown but were expanded in colleague numbers and improved with more sophisticated technology, were major factors.

CB: Everyone understood their place in the business and their contribution. That's something we don't want to let go, when everyone realises they have such a key part to play in the business, it brings out the best in people. We have always had staff engagement surveys but we realised what mattered is to feel that you are valued.

We also realised we can't do everything. We had already embraced e-commerce and online sales but one of the lessons we learned was getting customers to do more themselves online otherwise we were trying to resource the business back to a level where we could cover absolutely everything.

HOW WERE YOU ABLE TO TAKE COST OUT/USE SUPPORT TO SECURE PROFITABILITY?

SS: The support of so many of our partners – OEMs, stockfeed providers, support services etc – was heartwarming. In so many cases, we received payment holidays. As a privately-owned independent business, we are grateful for that support when it was needed most, and will look to repay that with our loyalty going forward.

SF: We completed a 'soup to nuts' review of all aspects of our cost base at the beginning of the pandemic and stripped out as many unnecessary costs as we could.

Obviously, we took advantage of the UK Government support that was offered and, interestingly for us, this did vary with differences between the four nations' approach and in the Channel Islands, there were fundamental variances between Jersey and Guernsey.

While we were, I believe, efficient with our cost base pre-pandemic, we became much more nimble during it and this has continued to the extent that many of the savings we made will continue through 2022 and beyond.

GRAEME POTTS, EDEN MOTOR GROUP

ADVERTORIAL

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How Assurant innovates to deliver

Assurant is continually breaking new ground in automotive value-add solutions to bring about new levels of customer satisfaction - and allow dealers to maximise revenue opportunity. Ash Robson, head of auto innovation at Assurant, tells us about their latest developments.

Ash Robson
Head of auto innovation

Ash, why does Assurant place such emphasis on innovation?

Our view is that the warranty and aftersales products sector has, in some ways, not taken full advantage of all the available advances, both in product development and use of technology. We believe that this can be to the detriment of the customer and the dealer, so we try to take a proactive approach that makes use of more innovative thinking and apply this to emerging market shifts and trends.

Can you give us an example of something from Assurant that reflects this approach?

Well, we are seeing growing momentum behind EV One, our specialist EV warranty product. It can be applied to any externally charged plug-in vehicle – meaning battery electric vehicles, plug-in hybrid electric vehicles and plug-in series hybrids – that are up to a maximum of eight years old up to 80,000 miles on the clock at the time of purchase. Cover can be for a variety of periods up to 24 months and up to a limit of the vehicle purchase price. EV One is unique and innovative in that it covers all variations of EV and hybrid technology, bespoke to this sector.

What else are you doing on the technology front?

We're carrying out a lot of work with data, especially when it comes to creating some exciting new dashboards for prospective partners. Through looking at our book of policy and claims data, our underwriting data, and dealer's used car stock mix, we can show the kind of penetration volume for warranties they could expect to achieve by working with us. This type of data-driven approach demonstrates our expertise, our data capability, and the fact that we are much more than just a traditional automotive warranty product provider.

We also look to future emerging trends. Our global and Connected Living capabilities allows us to draw on learnings from other markets and lines of business. For example, we've recently conducted research at a global and local level on the impact 5G will have on the future Connected Car. This helps us and our partners to stay ahead of the curve for new opportunities in the automotive market that others may miss.

Beyond innovation, what else do you think are Assurant's core strengths?

On a corporate level we offer a high level of both financial stability, being a Fortune 500 company. Our underwriting is also all done in-house, so everything is integrated, which gives us a whole range of advantages. Dealers can be sure that partnering with us is a sustainable proposition.

What are you working on for the future?

Now more than ever things are moving at pace in the automotive market. The government commitments to zero emissions, challenges in production relative to chip technology, and even the changing nature of customer car journeys means we are continually looking at future developments. It's always at the forefront of what we do. Digital key insurance is one example which is growing in momentum, but equally in the EV world it becomes not just about the car but the charge point and infrastructure too. We're having exciting conversations to help keep those elements working under warranty for customers and dealers alike.

Who is Assurant?

- We've been innovating and adapting in the automotive industry for over 125 years.
- Our balance sheet is solid with $44 billion in assets, $9.2 billion in annualised revenue and $332 million in holding company liquidity.
- We're part of Assurant Inc., a financially stable Fortune 500 company that's listed on the NYSE
- An automotive partner with underwriting excellence. We are proud to be an experienced UK based insurer.

Our products

Extended Warranty: Choose from four different frameworks of warranty, including insured, non-insured and specialist electric vehicle options. Our flexible approach allows your business to provide a warranty programme that suits the needs of your business and customers.

Guaranteed Asset Protection: Provide your customers with protection against financial loss, from a stable and trusted UK provider.

Cosmetic Protection: Our cosmetic protection suite offers cover for scratches, dents, scuffs, alloy wheels and tyres, to help customers keep their cars in prime condition and maintain vehicle value. We provide Scratch and Dent, Alloy Wheel, and Combined Alloy Wheel and Tyre Insurance.

Service Plan: Keep your customers coming back with a Service Plan programme.

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RK/SH: The Government's rate relief and furlough schemes helped us during a particularly difficult time in 2020. Although Drive Motor Retail was already undergoing a resource review before the pandemic hit, this was expedited during Q2 2020.

The changes we made to our business structure, processes and systems to secure profitability during 2020 will, undoubtedly, support Drive's performance and growth for many years to come as the market continues to evolve.

RL: Other than some small savings on marketing, the only savings made were the business rate holiday and furlough, as for periods when we had no showroom visitors we managed the business with fewer staff.

GP: We were extremely grateful for the Government's CJRS furlough scheme, and thus able to protect the employment for the vast majority of our colleagues at a time when revenues were severely constrained.

We also restricted all but essential expenditure to conserve cash resources. Our strong balance sheet and characteristic control of working capital meant that we were able to get through the year without recourse to any further loans or payment deferrals.

CB: It took a pandemic for us to realise there were costs in the business that had become unnecessary and it gave us the opportunity to deal with that. Volvo is my only representation and they were extremely understanding in realising the imposition on us in respect of standards and targets and that they had to be removed quickly.

We learned our biggest lessons in aftersales on how to be more efficient. Customers were arriving and leaving on time. I don't think customers particularly respected our time. We have managed to hang onto some of those disciplines.

We received savings from some of our suppliers, in particular Auto Trader's support has been well documented. We have reviewed the costs of all of our suppliers and we have pushed them a bit further than what we would have done in the past. Where it has not been possible to reduce costs, we have received added value from them.

When you think our turnover is 98% cost, maybe we can get it to 97%. We have got some absolute champions among our staff who have put their heads up who we didn't see pre-pandemic. We have rewarded and recognised our teams' performance and that has paid us back in terms of productivity.

LOOKING AT 2021, WHAT IMPACT HAVE THE EVENTS OF THIS YEAR (MORE LOCKDOWNS, VEHICLE SUPPLY ISSUES) HAD ON THE BUSINESS UNTIL NOW?

SS: Like many businesses we have had a sustained period of self-reflection. This has manifested itself in three key areas: how we can deliver a better customer experience; how we can drive better value for our manufacturer partners; and how we can be a better employer.

We have signed with Online Reputation which allows us to speak to every sales and service customer. By taking on board customer feedback we can learn from our mistakes and review our processes to deliver a more customer-centric experience.

We have, for example, this month opened up a brand new state-of-the art Volvo centre.

This investment delivers on OEM aspirations. It is the case with all our manufacturer partners that we don't want to be different to the rest of their network, we want to be better.

We are currently developing a talent management programme that will touch every employee.

The aim is to develop every colleague to their potential.


CLIVE BROOKS,
CLIVE BROOKS
VOLVO

SF: I think we were all extremely disappointed that we had to come into 2021 in lockdown. But, as we had adjusted to the new way of working, it wasn't such a big problem as at the beginning of the pandemic.

From a new sales perspective we've had to re-focus our teams on taking orders rather than, for the most, selling from stock. Our order banks are full on both car and CV and while we expect the semi-conductor issue to continue well into 2022, I think we'll see some easing in the coming months particularly in the CV arena. As we speak, we have forward sold orders for CV in excess of 40,000 units. Used stock is at a real premium, prices have risen astronomically this year and look set to continue.

I believe the prices will remain at these levels through most, if not all, of 2022 and I don't think there will be an 'Armageddon' one-day crash, rather an easing of prices progressively as new stock starts to filter through. I also think OEMs will use the experience of becoming much more efficient in the supply chain process rather than having fields full of cars and CVs lying unsold.

RK/SH: Although 2021 has also had its challenges, Drive is set to have its most profitable year yet. The changes we made to our business during 2020 meant that we were able to adapt immediately to the Q1 lockdown and could continue to operate our sales and aftersales services remotely.

Supply issues have meant that the used car market has been particularly strong this year, with increased demand and profits per unit higher than ever. We have closely monitored the market to ensure order intake and PPU continue to perform well and have ensured our teams are making the most of the opportunities available. Due to this, we believe we are outperforming a very buoyant market.

RL: The changes forced upon us and the lessons learnt from 2020 have helped tremendously and, so far, our FY from 21/22 is far in excess of the previous year (our best ever). Used cars margin, new car margins, plus the fact we added MG in June 2020, have all contributed to a great performance. Service is also setting new records with September 2021 being our best ever month. And now traffic is back to normal, parts business is pretty much back to pre-COVID levels. The increase in four months this year, compared with the same period in 2020 is about double the return on sales.

STUART FOULDS, TRUSTFORD

Nathan Tomlinson, dealer principal, Devonshire Motors: Taking a snapshot today there are two variables which are now part of normal business, both of which have an impact on how we run the dealership from a strategic position but also carry longer-term implications.

First, we have to manage the supply limitations with new and used vehicles, we also have those same supply disruptions in aftersales. In sales this is very much a blessing and a curse. We've been fortunate with Hyundai, who have supported us well with availability and, where supply is limited, margin has increased accordingly.

In aftersales, supply disruptions don't carry the softening effect of being able to increase margin. We've had a lot of disruption to work around. Parts and accessory back-orders, often with no ETA, cause their own unique problems for both the consumer and for the business with vehicles off-road for extended periods, new vehicles being delivered without key accessories, and an increase in uninvoiced work in progress all adding to the complexity of running an efficient aftersales operation.

Second, we have to work alongside the collateral effects of the pandemic which have changed human behaviour patterns, perception, values and health.

This is by far the biggest challenge we face now and in the future, especially when combined with the already present skills shortage in the automotive sector.

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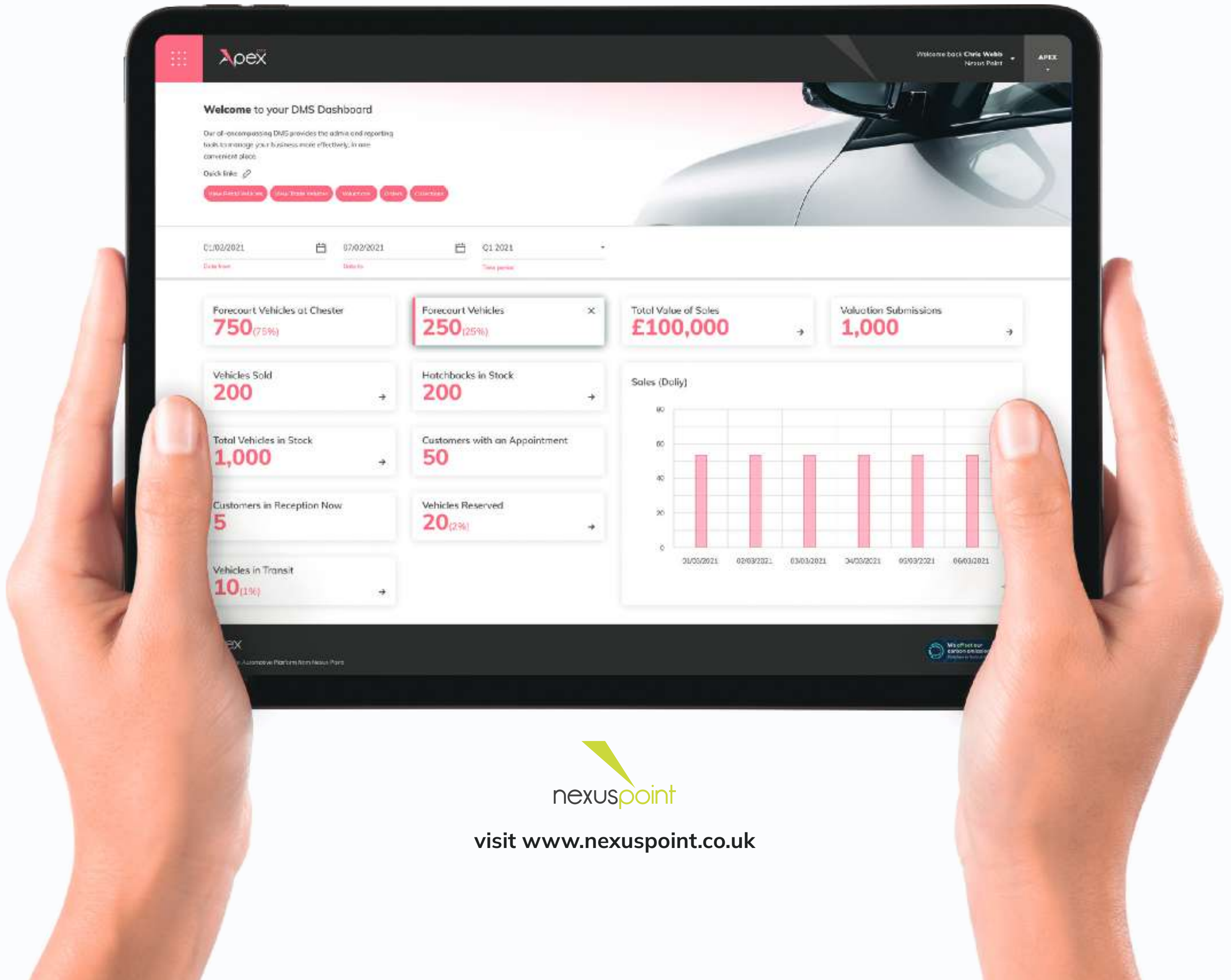

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Operating a business in a retail environment which demands extreme commitment to excellence requires a culture – and that relies on people.

GP: The third lockdown in Q1 of this year was particularly disappointing for our colleagues who were anticipating a rapid return to normality and a buoyant market, as customers also looked forward to enjoying a New Year shopping/purchasing as normal. However, since then, we have enjoyed a steady recovery in activity levels across the business, and although new vehicle supply constraints have had a significant impact, not least in further reinforcing used car demand, as retailers, the realignment of supply with demand over a cycle of a few months will ultimately be good for retailer profitability and customer experience.

CB: Our profitability at the end of September has already exceeded what we achieved in 2020, that's quite remarkable in itself. We are looking at a very strong Q4 despite the supply issues which has meant customers are not getting the best experience.

We don't seem to have had a month in the past 18-19 where we have had a single department at full capacity because of staff absences due to the pandemic yet we will do our best year ever.

On used cars we have made sure we have kept sales rate and restocking rate completely in line and it has been a phenomenally successful year. Used Volvos aged three-to-five-years have accelerated in value and we have had access to that stock, we have bought cars from our customers directly.

STUART HARRISON, DRIVE MOTOR RETAIL GROUP
ROB KEENAN, DRIVE MOTOR RETAIL GROUP

WHAT OPPORTUNITIES DO YOU WANT TO CAPITALISE ON IN 2022?

SS: It is these three opportunities – consistently delivering an outstanding customer experience, driving improved manufacturer partner value and becoming an employer of choice through our talent management programme, that we are focusing on and that we believe will unlock an improved performance for our business, partners and colleagues.

SF: Our used stock turn based on this year will be significantly better than in the past, margins will be much better on all fronts.

On new car and CV, we'll operate much leaner and sale-to-delivery time will be one of our main KPIs. Treating our customers like one of the family will be the backbone of the TrustFord ethos.

We will capitalise on being not only the UK's largest Ford dealer group but also on being the UK's largest 'all makes' CV dealer by some significant margin.

We will continue to expand our hugely successful Parts Plus business which provides rapid delivery to IMTs pretty much across the UK and Northern Island.

Our UK-wide distribution using the 'NOW' initiative has gathered and continues to gather momentum. We will continue with our 'Leading Ladies' gender balance initiative, progress performance in our 30% Club membership and strive to improve not only gender balance but inclusion and diversity.

We will continue to develop our Future Leaders programme as well and look to put in place real changes to retaining and attracting the best people in the industry.

RK/SH: We are focusing our efforts on further developing our employee benefits programme and wellness initiatives to become an industry-leading employer of choice.

We know the automotive industry can be challenging, and it's been a difficult year for many, but at a time of so much change, we believe our people will make the difference to our success.

The continuation, refinement and development of our multi-channel sales and aftersales processes is also key to continued success.

We will be working with our various business partners to remain at the forefront of online advancements and will continually assess our processes to ensure we are catering to the changing needs of our customer base.

Finally, the opportunity presented by the electrification of cars is definitely something we intend to capitalise on during 2022.

RL: Our initial plan was to extend our Mitsubishi showroom to accommodate MG, but as Mitsubishi sales have now finished, we saved expense and upheaval by simply changing from Mitsu to MG, a large cost saving, and MG has already shown massive potential and far outweighs the rewards from Mitsubishi, so that bodes well for 2022.

Having acquired the adjacent building and land in late 2018, we are able to look at opportunities to further develop the now three acre-plus site in a great location.

Adding a further franchise is our plan, and with many new entrants and a shortage of available affordable dealer sites in Leeds we are in a great position to grow without losing our culture and DNA.

We are looking at several options, but nothing has been agreed.

NT: I'm a huge advocate of balancing today's opportunity with vision for the future. But, to a certain degree, part of today's opportunity is putting the business in a position to be future-proof, as things have changed so much in the past 24 months.

The move to clean mobility – and quite possibly that comes along with a new type of relationship between retailer and VM – means we've had to make fundamental changes to our own model and partnerships. That work will continue well into 2022.

In terms of operationally, it's really important to make a little bit of a distinction between selling cars and recognising where you have a valuable commodity.

The supply bubble we operate in today offers us the opportunity to generate one-off returns per unit that have never been possible before.

However, it does require a little bit of a culture change to make the most of the opportunity and some thought about how things are done and why. None of us, at any point in the supply chain of new or used vehicles, is operating the same volume-based model we did before. But are we recognising that, acting accordingly, and optimising the way we operate?

GP: We look forward to the year that we hoped 2021 would be, i.e., few or no operating restrictions and buoyant consumer demand. As mentioned, we are looking forward to some improvement in new vehicle availability and reduced order-to-delivery times for our customers; however, we will seek to maintain the improved profitability that should flow from the switch to a more demand pull, rather than supply push, industry.

CB: We are already moving one of our locations, allowing me to invest in the brand. Volvo is requiring significant investment from stakeholders and I feel proud to be able to invest without too much borrowing.

WILL YOU BE ACQUIRING/ EXPANDING OR RESTRUCTURING IN 2022?

SS: We have experienced an extremely turbulent 18 months. It is not unnatural that a strong, healthy business such as

Snows will be in discussions with manufacturer partners about opportunities to grow the portfolio. Expect announcements.

SF: For TrustFord in 2022, we see lots of very exciting opportunities ahead. While too sensitive to reveal now, watch this space! Exciting changes will see investments, acquisitions, re-structures all of which will cement our place within the UK top 10 groups.

But I recognise that while important, size is not everything and so we want to become one of the dealer groups of choice in attracting the very best talent in the UK.

RK/SH: As a company, we are in the fortunate position where we have consistently performed at a very high level over a number of years. This growth has been both organic and expansion through acquisition – both of which we are very keen to continue throughout 2022.

We hope to grow our business year-on year and believe our current structure is sufficient to do this. Our shareholders' strategy is to further diversify our franchise portfolio over the short- to mid-term, so we will be actively seeking opportunities to do so over the next 12-18 months.

GP: Eden has a long-term strategy of emphasising delivery of excellent colleague and customer outcomes over any other factors, while being prepared to add to our portfolio, brands and locations that complement the existing group.

CB: Our Bradford site will be moving location early next year and we will refurbish Huddersfield. We are moving from a one-acre site to a 2.2-acre site which will provide the opportunity to significantly sell more used cars. Bradford is always in the top 10 for used cars for Volvo and I intend to be in the top 3 or 4 and occasionally top. I want to be the biggest Volvo used car retailer. We will be capable of selling 1,000 used Volvo vehicles a year across two locations, that's my ambition, this year we are likely to do 800 so that's a 20% increase.

WHAT THREATS DO YOU SEE AHEAD IN 2022 AND WHAT CAN YOU DO TO MITIGATE THEM?

SS: Clearly, we are experiencing short-term supply chain issues due to reduced semiconductor availability. However, our OEM partners are taking every measure possible to maintain deliveries.

We believe during 2022 our customers can expect to see a return to normality. Another significant challenge is our collective need to decarbonise.

Positively, we are seeing OEMs adapting quickly and, most importantly, consumers are demonstrating a desire to adopt these new technologies.

We celebrate our 60th anniversary next year. We are planning activities – part of which is how we can make that difference with regards to decarbonisation and the world we live in. At the moment it would be wrong to make any great claims. Hence for now we only want to say … another challenge is our collective need to decarbonise. We are, though, aware of our responsibilities.

SF: New vehicle supply chain issues with semiconductor shortages; used vehicle supply/availability and pricing; energy price rises (especially in bodyshops); inflation; EV infrastructure nowhere fit for purpose; rising payroll costs; recruitment of key roles such as technicians; retention of colleagues, work/life balance challenges; potential interest rate increased; regulatory changes especially in the F&I community; disruptors increasing and trying to ruin the traditional model; and VAT Dealer Importer of Record (DIOR) changes in 2021 have impacted the importing and VAT accounting of vehicles produced worldwide with Brexit adding to complexity.

In terms of mitigation, some of the threats are real and will happen. We will use our best endeavours to improve performance to cover increased costs. We plan enhanced T+Cs for our colleagues not only to retain, but to attract, the best using a wide variety of initiatives and continue growth in key areas of the business.

RK/SH: 2022 is likely to continue to be a very transitional market, with many disruptors for businesses, including emissions targets, a changing product portfolio, the changing competitive landscape and stricter emissions targets for manufacturers and dealers alike. However, our current performance puts us in a healthy position to overcome these challenges as we continually evolve and adapt. Although each of these present threats for our business, we are confident we can overcome them by having the strongest, happiest team and this will be our focus for the rest of 2021 and into 2022.

RL: I don't see many serious threats to my business, just lots of opportunities, provided we continue to offer class-leading customer service and experience. However, recruiting staff who can provide this and have the desire to work hard, earn well and accept change is proving a challenge.

GP: The consumer-led element of the switch to alternatively fuelled vehicles is extremely desirable; however, the politically-driven pressure on OEMs and therefore, franchised retailers, to achieve volumes considerably above this natural level of demand already impacts retailer margin and, arguably, customer service.

Without some price realignment between ICE (internal combustion engine) and AFVs (alternative fuel vehicles, this continuing pressure could have quite serious implications for overall demand and profitability.

We are seeking to mitigate this by doing all we can to increase consumer awareness and desire for AFVs. Among the actions are the vast majority of our company vehicles are either EV or PHEV , and in our marketing and sales processes, we are laying great emphasis on wholelife costs.

CB: The threat of not fully embracing or understanding the manufacturer's sales channels.

Volvo is looking at opportunities such as selling online and subscription models. What we need to do is to keep it as simple as possible for the customer. The danger is we will over-complicate what needs to be a simple process.

That's my worry, the manufacturer may over-complicate in its desire to have all these sales channels. I am also concerned about over-supply. While we are all ambitious to do sell more, we need to do it responsibly and where there's a genuine market. I am excited about threats such as Cazoo, etc. Exciting things are happening and the fact is we can compete because we are much closer to it. DEBBIE KIRLEW


NATHAN TOMLINSON, DEVONSHIRE MOTORS


ROBIN LUSCOMBE, LUSCOMBE SUZUKI AND MG LEEDS

Dougal Keith (left) and his brother Angus took over the running of DM Keith when their father died in 1998

FACE TO FACE: DM KEITH

SHEDDING 'HUMBLE' BEGINNINGS

DM Keith has taken enormous strides from its days of operating out of a wooden shed. Now it sits in the AM100 and trades from eight locations. Tom Sharpe reports

"The top 60 of the AM100 was a goal I set some time ago, when the business was still a Škoda dealership based out of what was basically a wooden shed," DM Keith managing director Dougal Keith told *AM*.

"It wasn't something that I shared at the time. People would have laughed at me, I suspect. But the fact that our latest acquisition has the potential to get us there means this is a real landmark moment for the business. It's something I'm really proud of."

DM Keith is a business that remains well aware of its roots.

Despite asserting that he does not like a picture of himself alongside his brother and fellow director Angus playing with their first 'dealership' together as young boys – a paper mache home-build – it features in the presentation Dougal gave to *AM* about the business.

It's also one of the first things that greets visitors to the group's website as a short video gives an overview of how their father, Duncan, started the business as a "back street garage" after he was demobbed from the Army after World War II.

In 1972, he started selling Russian-built Moskvich cars, and then Lada, before 1976's arrival of the Škoda brand.

"I'm sure he'd be immensely proud of what Dougal and I have achieved," Angus says of their father, who died in 1998, leaving his sons in charge.

INFLUENTIAL ROLE OF VW

Dougal reflects that it was the targeted ambition brought to Škoda under Volkswagen Group ownership that prompted the change of mindset that, ultimately, created the business it is today.

"The big change for Škoda came when the Czech government started looking for a Western partner, and, thank goodness, it was VW," he says.

"The presentation we received after VW took control was a seminal moment in my career. It was given by a guy called Trond Magnussen and I recall him saying 'we will take this brand to 2% market share'.

"I went back to the wooden petrol kiosk that served as my office at the time and figured out what that meant in Leeds – 350 cars.

"My next thought was 'when the Germans get here and see our little wooden building that's likely to be the end of it', so we bought this building."

AM met Dougal and Angus Keith in the Leeds Škoda facility on Thwaite Gate that was first occupied by the business in 1992 and serves as its headquarters.

After DM Keith moved into its new dealership site in the early '90s, Dougal explained that it didn't take long for him to feel the need to defend the opportunity presented by the Škoda brand from larger car retail groups.

A chance conversation with a friend at Ford's regional operation in Harrogate then introduced him to the concept of a contiguous market area strategy (CMA) strategy.

"As soon as I'd had the conversation, I remember getting hold of a map out of one of the cars and drawing a circle around the Leeds and Bradford area, thinking 'that's an area we can defend'," he recalls.

The group first expanded with Škoda in Ossett, on the outskirts of Wakefield, before adding Bradford, Huddersfield and York sites.

In 2011 came the addition of the showroom in Hull.

Four years later the group embarked on a £5m refurbishment of all of its facilities before growing by a third with the 2018 acquisition of Grimsby's Westgate Motor Group, adding Seat and Honda franchises.

Almost 30 years on from the group's expansion into its new Škoda showroom in Leeds, DM Keith now operates 15 franchised retail sites.

Most recently, the business grew its scale from 12 to 15 franchised retail sites with the acquisition of Ringways, in August, with the help of funding support from banking partner NatWest.

The move added its first Ford, Ford Commercial Vehicles and Kia Motor UK franchises.

Added to DM Keith's 2020 revenues of £124.3 million, Ringways' £84m reported turnover would take the group's turnover to £208m, while its return on sales would stand at 1.3%.

Dougal told *AM* that the "quite complex" business should grow its combined revenue to more than £230m, however.

DM Keith's annual financial results for a COVID-impacted 2020 showed a 2% return on sales figure, with profit before tax of £2.5m (2019: £1.55m) achieved against the backdrop of a 17.1% decline in revenues.

New car sales declined 23.6% to 4,482 (2019: 5,866) as used cars delivered a 14.8% dip in volumes to 3,367 (2019: 3,952) in the period which saw closures enforced by H1 COVID-19 lockdowns along with winter trading restrictions.

As well as experiencing the impact on the business and its employees, the Keiths have first-hand experience of COVID-19.

RINGWAYS HANDOVER

Dougal recalls how he was forced to complete the Ringways acquisition process remotely as both he and Angus fell ill with the virus.

Papers had to be brought to his home in sealed bags for signing before being returned by courier in a military-style procedure designed to get the deal over the line, he says.

As well as two new manufacturer partners, the acquisition of Ringways will also deliver an expansion of a DM Keith fleet business that achieves a volume of around 3,000 cars annually through the addition of the £6.3m turnover Ringways Hire and Leasing (RHL) operation.

Ringways will retain its branding and Dougal says that staff were told that "nothing will change for 90 days" following the takeover.

"These are franchises that we haven't worked with before and this is a good business with some great people," he says.

"What we are absolutely not going to do is go in and turn things upside down.

"We know there are some improvements we can make, in eVHC, for example, but we want a good oversight of the business and how it operates before we act.

"How do you know what might need changing until you get to know the business properly?"

Its recent acquisition wills end DM Keith scaling the AM100 rankings, so now the group has re-set its growth targets with the creation of its 'Growth 50!' plan.

Strong core values will underpin any growth, insists Dougal, with the scale of his ambition dictated by the amount of hands-on input and oversight he and Angus are able to maintain.

The 'Growth 50!' plan targets entry into the AM100's top 50 by 2028 with an aim to grow revenues to £320m and profit to £6m with further growth to 20 sites and around 650 staff.

Dougal suggests that there might be scope for the group to grow with its existing partners.

But growth will not come at the expense of the family feel of his #TeamTartan band of employees.

Asked why the group has capped its growth ambitions where it has, Dougal says: "It's largely about the numbers we feel we can manage and maintain that influence across the whole business.

"It might be that we get close and decide it's getting too big, in which case we may decide to stop short."

The Keith tartan has been tweaked to accommodate Škoda's distinctive green

#TEAMTARTAN

During *AM*'s visit Dougal and Angus paid a visit to the workshop of the Leeds Škoda site, where staff assembled for one of the group's fortnightly "family huddles".

These give an overview to staff of how the business is performing against its key performance indicators (KPIs), keeping them informed and, more crucially, maintaining a sense of involvement in the wider business.

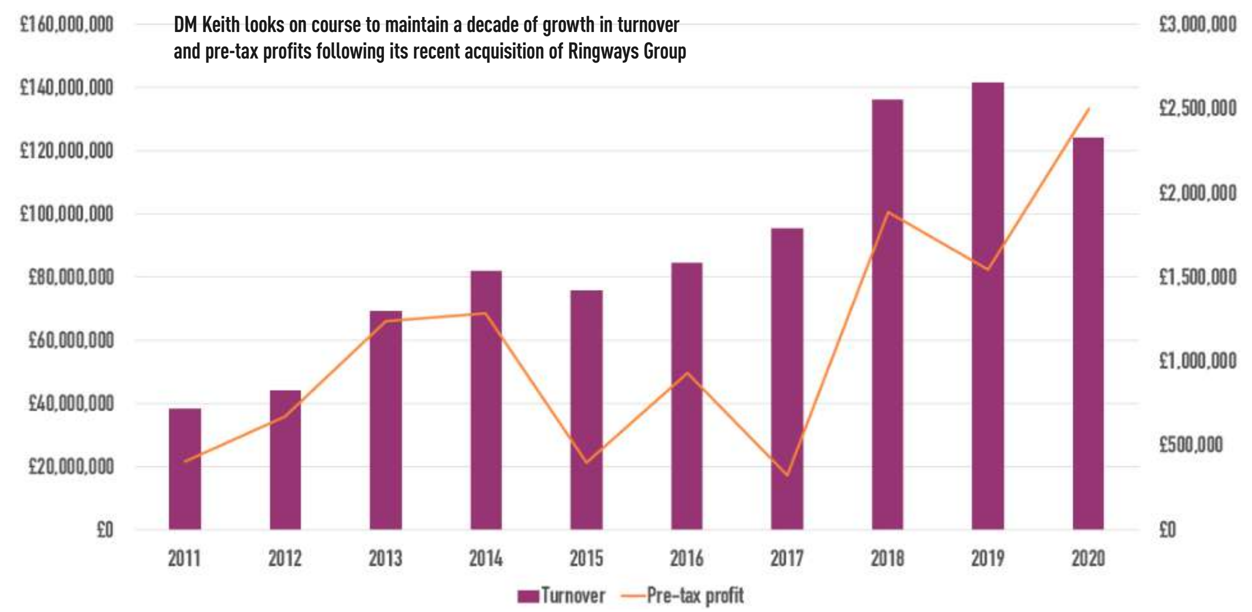
Reinforcing this, DM Keith has a team of 'champions' from across the business.

The group of individuals from a range of job roles meet on a quarterly basis to discuss the business and make suggestions to management.

DM Keith staff were also responsible for forming and formalising the group's values.

Dougal says: "I asked staff to tell us what they thought were the things at

DM KEITH'S DECADE OF GROWTH



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the heart of how we do business and I was blown away when they presented me with a full break-down of our values. It's a real testament to our levels of engagement."

The result was a graphic spelling out the Fit Fun, Family and Fearless philosophy of the business.

DM Keith's widespread use of the Clan Keith tartan – tweaked to accommodate Škoda's distinctive hue of green – was also an organic process which gathered momentum due do the enthusiasm of staff.

The business recently launched the DM Keith Academy to develop its workforce, although Dougal concedes that this not a "physical build", rather an e-learning platform operated by training provider Get The Edge.

Staff at DM Keith are about to see changes to their working terms, too.

At the "family huddle" Dougal reminded employees that the business would be getting sales teams together at Leeds United's Elland Road stadium just days later for their first mass meeting since the start of the COVID-19 pandemic.

He tells *AM*: "We are rolling out a new pay plan. We'll be cutting hours down to 41.5 with a bigger basic pay. Commission-based earning can be great for some, but it's not great if you want to set up a mortgage."

Dougal says changes to the automotive retail sector have prompted the shift.

> WE'LL BE CUTTING HOURS DOWN TO 41.5 WITH A BIGGER BASIC PAY. COMMISSION-BASED EARNING CAN BE GREAT FOR SOME, BUT IT'S NOT GREAT IF YOU WANT TO SET UP A MORTGAGE
>
> DOUGAL KEITH, DM KEITH'S MD

DM Keith has created a centralised sales team to better manage the potential for contactless sales, although he concedes this process applies to just 15% of customers currently.

The impact of the global shortage of semiconductor microchips on new car supplies has also meant reduced handovers in the traditionally buoyant September plate-change period and the potential of a further 12 months of disruption, Dougal believes.

An order take incentive has been added to boost the earnings – and morale – of sales staff during the period.

"That's just part of the re-engineering piece we are embarking on now," he says.

SUPPLY AND DEMAND

Sales director Martin Nield told *AM* how the group had been forced to re-think its approach to a normal September in 2021 to tackle supply shortages and used car stocking challenges.

Both Škoda and Seat struggled with new car supply, Nield says, with Škoda dropping its targets initially by 27% and then 55% as the manufacturing outlook for the month became clearer.

"In the end we were 140% over our target," Nield says. "But getting there required us to be entrepreneurial. We saw some cars come into importer stock and were quick to act.

"Right now manufacturers won't release cars until you have a customer order form, so you have to be decisive and act fast."

Aware that customers now need to be kept informed about the status of their new car order, DM Keith has automated its delivery of progress reports to maintain a constant flow of information.

DM Keith's 2020 accounts show that the group held £21.092m in

DM Keith's Leeds HQ was the first purpose-built car showroom occupied by the business

> “I’M SURE HE (MY LATE FATHER) WOULD BE IMMENSELY PROUD OF WHAT DOUGAL AND I HAVE ACHIEVED
>
> **ANGUS KEITH, DIRECTOR DM KEITH**

new and used car stock at the end of last year.

Nield revealed that recent strategic shifts to combat the sector’s used car stocking difficulties had resulted in a situation where the group was actually “over-stocked” at the time of *AM*’s visit – contrasting the experience of many other retailers.

He says customers had been contacted to acquire stock, while under-priced vehicles on Auto Trader had been snapped-up as the business held on to larger volumes of its part-exchange vehicles.

Dougal says that more than £6m in used car stock had been “a point of contention”, but spelled out the need to act at a time of high margin sales.

STOCKING RETICENCE

Commenting on the discovery that the Ringways business had been holding off stocking forecourts due to the current price of vehicles, he says: “There was a concern about pricing, but I said ‘I’ve just spent £9.5m on the business, we need to have stock to sell. Get out and buy some’.

“The cost of vehicles is one thing, but what about the cost of empty forecourt space?”

Dougal and Nield said DM Keith’s used car business generally achieves an annual stock turn of 10x, but suggested that had increased in recent months as demand for used cars accelerated.

Dougal says: “The difficult thing is a change in mindset because perhaps we don’t want to sell cars quite as quickly as we have in the past. Right now, with prices appreciating, it could pay to hold on to vehicles a little longer. It’s a whole change in mindset.”

Like many of the AM100, DM Keith has plans to expand its used car retail operations.

A stand-alone Trade Cars branded used cars sales operation in Ossett, near Wakefield, currently sells between 350 to 400 part-ex vehicles a year.

Now the group is preparing to re-brand the offering and expand into a new 100-car site next to its Seat and Cupra dealership on Canal Road, Bradford, after securing planning permission for the former caravan retail site.

The site should be about to benefit from increased volumes of passing trade as Bradford Council moves ahead with The Canal Road Corridor scheme.

“With the Ringways acquisition we expect a greater volume of non-franchise part-ex vehicles and we want to realise the potential of used cars,” says Dougal.

The addition of Kia to DM Keith’s portfolio, and the AM Awards 2021’s EV of the Year, Ford’s Mustang Mach-E, are set to continue another shift in mindset that the business was already embarking on.

CHARGE POINT INSTALLATION

The business installed 20 charge points across its sites in 2020, realising its first EV sales with the Škoda Enyaq, while adding ex-TT racer and TV presenter Guy Martin as a Honda e customer at its Grimsby dealership in a car that would later feature on-screen itself.

It has also taken on the Seat MÓ franchise for a trial period, selling the Catalonian brand’s electric scooters as a zero-emissions last-mile mobility solution ahead of the arrival of the fully electric Cupra Born of its performance sister brand.

The potential of new brand partner Kia is not lost on Dougal, however.

To the end of September Kia had sold 10,000 EVs – more than all previous years of Kia EV sales combined – as its sales grew 29.6% year-to-date to 74,096.

“We’ve attended showroom launches of the EV6 and we’ve been blown away by it,” he says.

“In the metal, it is an amazing product and the technology is unbelievable. It’s a car that takes Kia into a whole new area of the market. With the brands we now have, and the business where it is now, it’s a very exciting time.”

FACTFILE

HEADQUARTERS: LEEDS
LOCATIONS: BRADFORD, DONCASTER, GRIMSBY, HUDDERSFIELD, HULL, LEEDS, WAKEFIELD AND YORK
TURNOVER: £124.3 MILLION (2020)
FRANCHISED SITES: ŠKODA (7), SEAT (2), CUPRA (2), HONDA, FORD, KIA AND FORD COMMERCIAL VEHICLES
EMPLOYEES: 445

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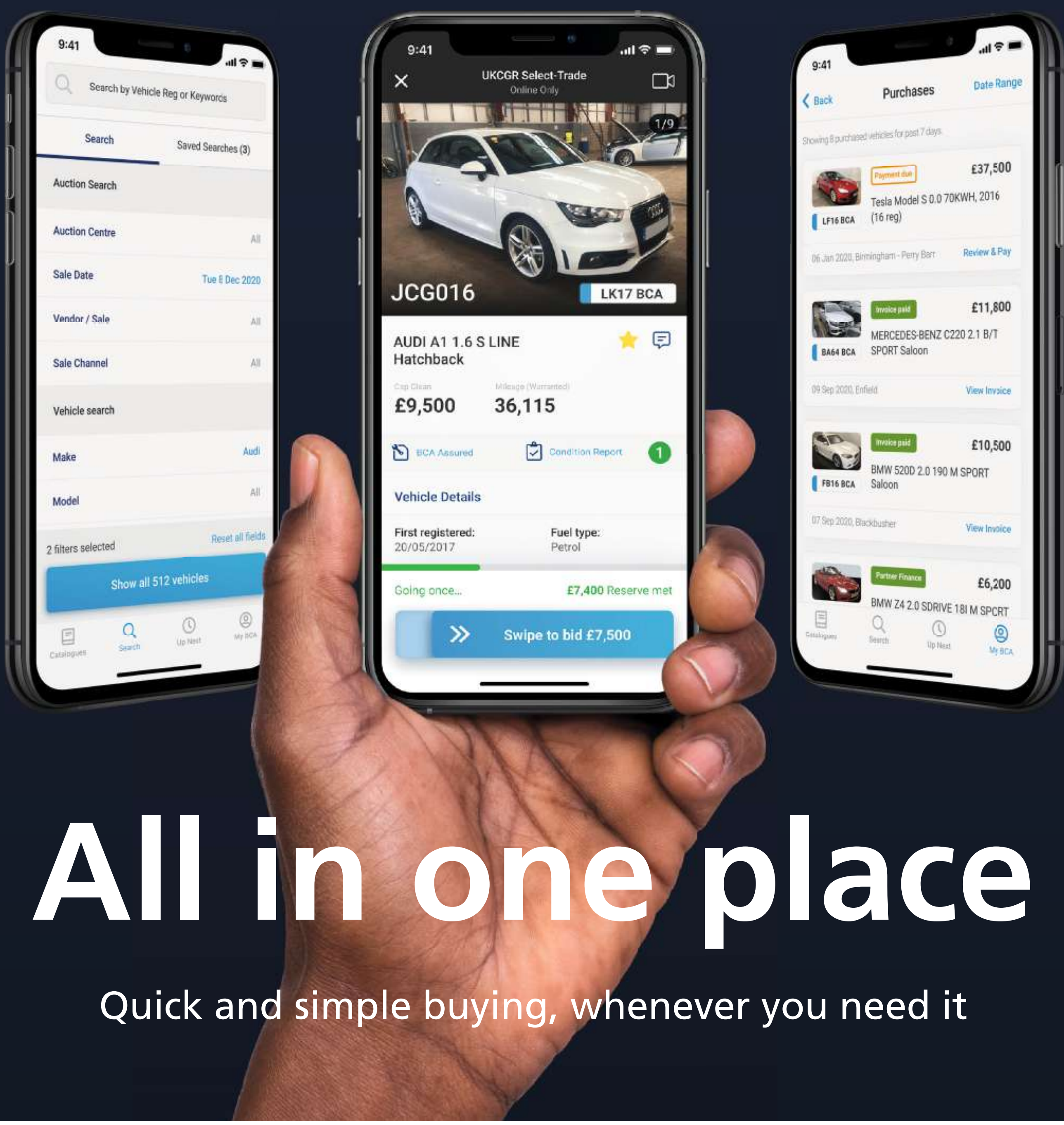

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