



# UK Driving Services

Trends Shaping the Industry

March 2026



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- This research was funded by RAC Motoring Services (RAC). The analysis and opinions expressed in this Report are those of OC&C alone and do not necessarily reflect the views of RAC.



# The report uses the following abbreviations and terminology

## Glossary

<b>ADAS</b>	Advanced Driver Assistance Systems: in-vehicle safety features that assist driving (e.g. lane keeping, adaptive cruise control)
<b>AV</b>	Autonomous Vehicle: self-driving vehicle, in this document referring to higher automation (e.g., Level 4/5).
<b>BEV</b>	Battery Electric Vehicle: fully electric vehicle powered only by a battery
<b>CAGR</b>	Compound Annual Growth Rate: average annual growth over a period
<b>DfT</b>	Department for Transport: UK government department publishing vehicle parc and transport statistics
<b>DIY</b>	Do it Yourself: Vehicle owners performing repairs/maintenance themselves rather than using professionals
<b>EV</b>	Electric vehicle: Umbrella term covering BEV, HEV and PHEV
<b>HEV</b>	Hybrid Electric Vehicle: non-plug-in hybrid (umbrella term that includes fully and mild HEVs)
<b>HOV</b>	Human-Operated Vehicle: conventional, non-autonomous vehicle driven by a human (baseline vs AV scenarios)
<b>ICE</b>	Internal Combustion Engine: Petrol/diesel vehicle
<b>IPT</b>	Insurance Premium Tax: UK tax applied to insurance premiums
<b>KPC</b>	Key Purchase Criteria: the factors customers consider when choosing a provider (e.g., trust, value, convenience)
<b>L0/1/2/3/4/5</b>	Levels of driving automation: L0 none; L1 driver assistance; L2 partial automation; L3 conditional automation; L4 high automation; L5 full automation
<b>LCV</b>	Light Commercial Vehicle: includes goods vehicles not exceeding 3.5 tonnes gross vehicle weight
<b>OEM</b>	Original Equipment Manufacturer: vehicle manufacturer (and, by extension, their authorised networks)
<b>ONS</b>	Office for National Statistics: UK national statistics authority
<b>PHEV</b>	Plug-in Hybrid Electric Vehicle: hybrid with externally chargeable battery
<b>Robotaxi</b>	Autonomous ride-hailing vehicle: a self-driving vehicle operating as an on-demand taxi service
<b>SMMT</b>	Society of Motor Manufacturers and Traders: UK automotive industry body (registrations/market data)
<b>SMR</b>	Servicing, Maintenance and Repair: scheduled servicing, MOT-related work, and unplanned repairs
<b>TAM</b>	Total Addressable Market: total market size including vended and non-vended spend
<b>VAT</b>	Value Added Tax: UK consumption tax applied to many goods and services
<b>YTD</b>	Year to Date: period from the start of the year (January 1 <sup>st</sup> ) to a specified date



# UK Driving Services is an attractive and resilient market, undergoing change, and increasingly favouring trusted, digitally-enabled, national providers

## Driving Services

Driving Services is a large, resilient market

- Driving accounts for ~75% of miles travelled in the UK, and is **highly resilient** – miles driven bounced back quickly post-Covid, and drivers see their vehicles as essential to their day-to-day lives
- A broad range of large markets serve the suite of driver needs, together making up the **£285-290bn ecosystem of Driving Services**
- The **market is growing, supported by long-term volume & price tailwinds**: large, growing car parc with ageing vehicles driving more miles on worse roads, coupled with service and parts inflation from increased parc complexity

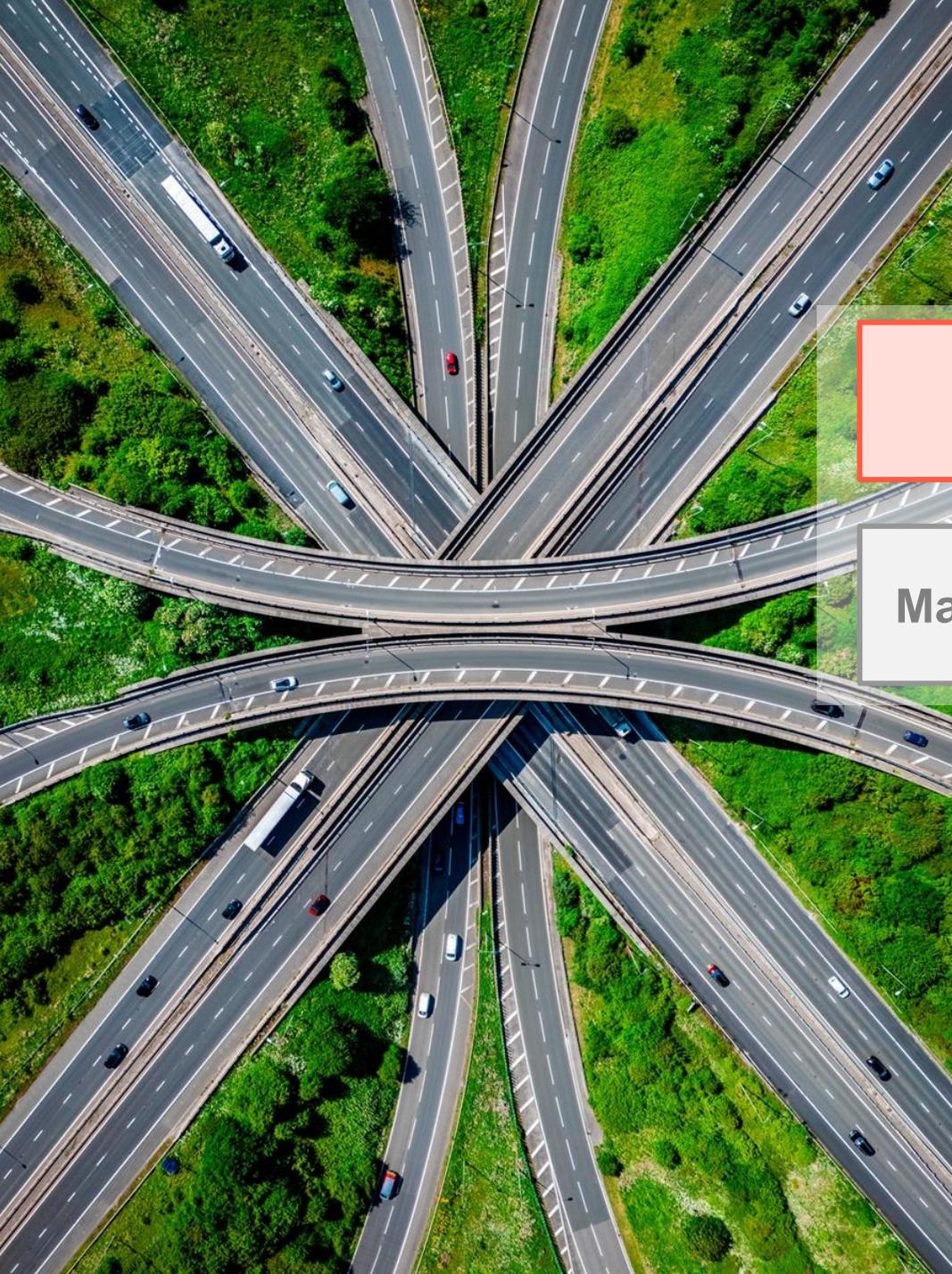
The market is changing and complex to navigate – with a flight to quality and digitally-led innovation

- **High quality provision is increasingly scarce...**
  - Western OEM **dealer networks are shrinking** (-34% 2000-25), while growing Chinese OEMs have much lower network density, reducing the range of local, convenient purchase and servicing options for consumers
  - This is exacerbated by **technician labour shortages** (18k vacancies Dec 2025 vs 7k Dec 2012) across the industry
- **...at a time when professional, high-quality provision is demanded more than ever**
  - Consumers lack the confidence and expertise for DIY – and OEMs are ensuring DIY is increasingly difficult
  - **Rollouts of EVs** (~18% of 2030 car parc) **and ADAS/AVs** place higher demands on technician skills, and the new technology creates anxiety for consumers
- **Provider digitisation and innovation, as well as consolidation, are creating new ways to win**
  - Digital capabilities are creating better products and allowing new customer journeys
  - Consolidation is allowing providers to segment and tailor propositions more effectively for different consumer needs

Winning service providers will be scaled, trusted, digital platforms

- Future winners must meet customers' longstanding needs - **trust, value, convenience, and simplicity** - but also increasingly demonstrate strength on emerging preferences for **more convenience, digital journeys, expertise, and being served anywhere**
- As a result, the winning providers will be those with national footprints, high brand trust, expert labour forces, and, increasingly, strong front/back-end digital capabilities
- **There is scope for these winners to leverage strengths to build platforms which bring together complementary groupings of sub-markets** – for example, Protect and Maintain (Breakdown, Insurance, SMR, Bodyshops) and Fleet Services (Fleet Mgmt, Data)
- This is **valuable both to customers (enjoying convenience and simplicity)** and to service **providers (extracting synergies and cross-selling services)**





## Agenda

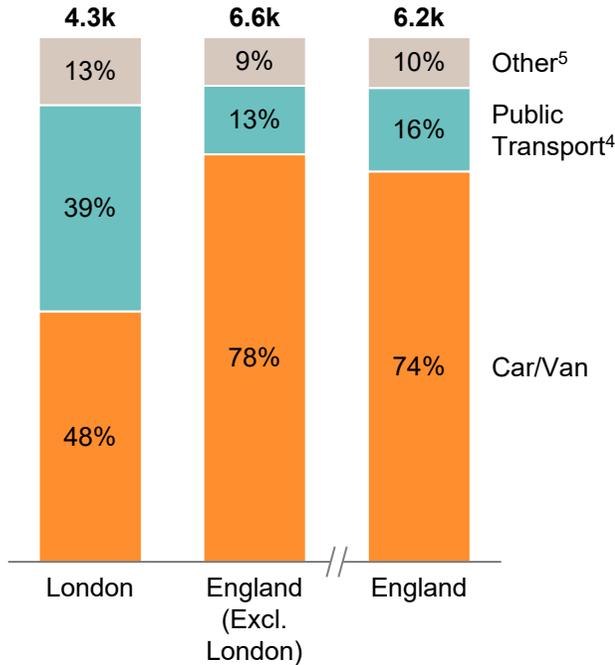
**UK Driving Services Market**

**Market Evolution: Selected Deep Dives**

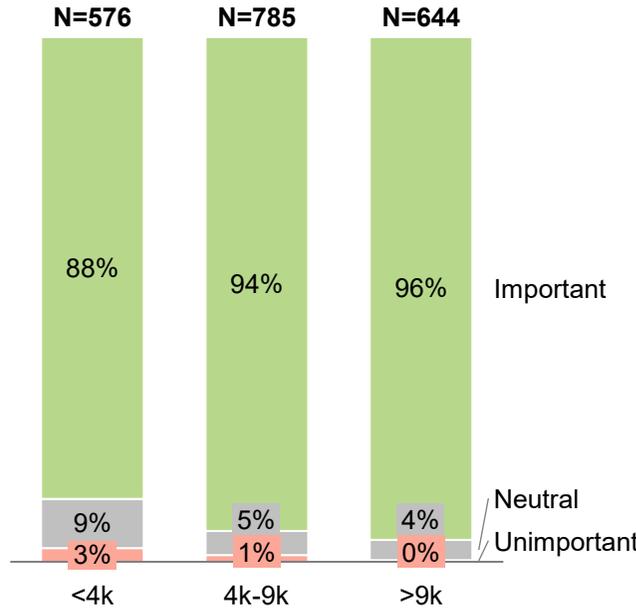
# Driving accounts for ~75% of miles travelled, with drivers seeing their vehicles as essential to everyday life

## Consumer Attitudes to Car Ownership

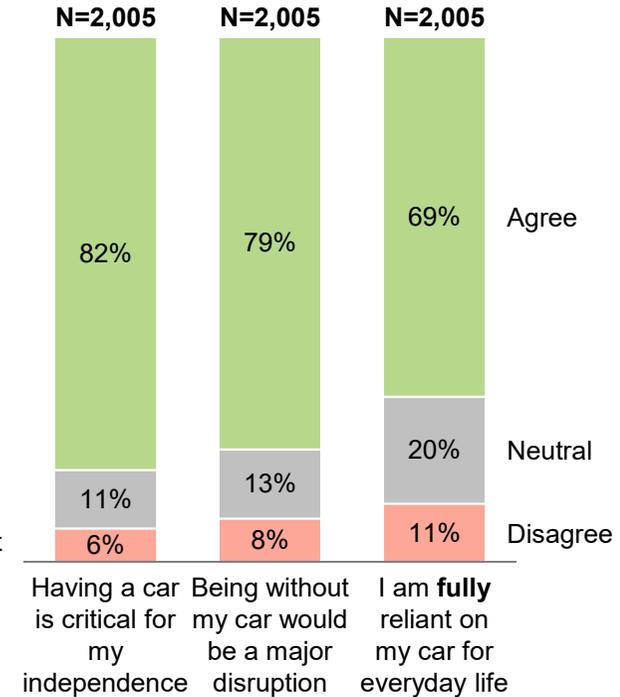
Avg. Distance Travelled by Mode, 2024 (000 miles)



Importance of Vehicle Ownership<sup>1</sup>, (% of respondents, miles driven per year)



Agreement Ratings<sup>2</sup>, (% of Respondents)



**Vehicles per Capita**

0.3      0.6      0.6<sup>6</sup>

**Net Importance Score<sup>3</sup>**

85%      93%      95%

**Net Agreement Score<sup>3</sup>**

76%      70%      57%

1. Q18: On a scale of 1-5, how important to you is having your own car? 2. Q19: To what extent do you agree with the following statements about car ownership?

3. Net Score calculated as the percentage that reply important/agree, minus the percentage that reply unimportant/disagree. 4. Public transport includes bus in London, other local and non-local bus, London Underground, surface rail, and other public transport. 5. Other includes walking, cycling, motorcycle, other private transport, and taxi/minicab. 6. Whole UK average

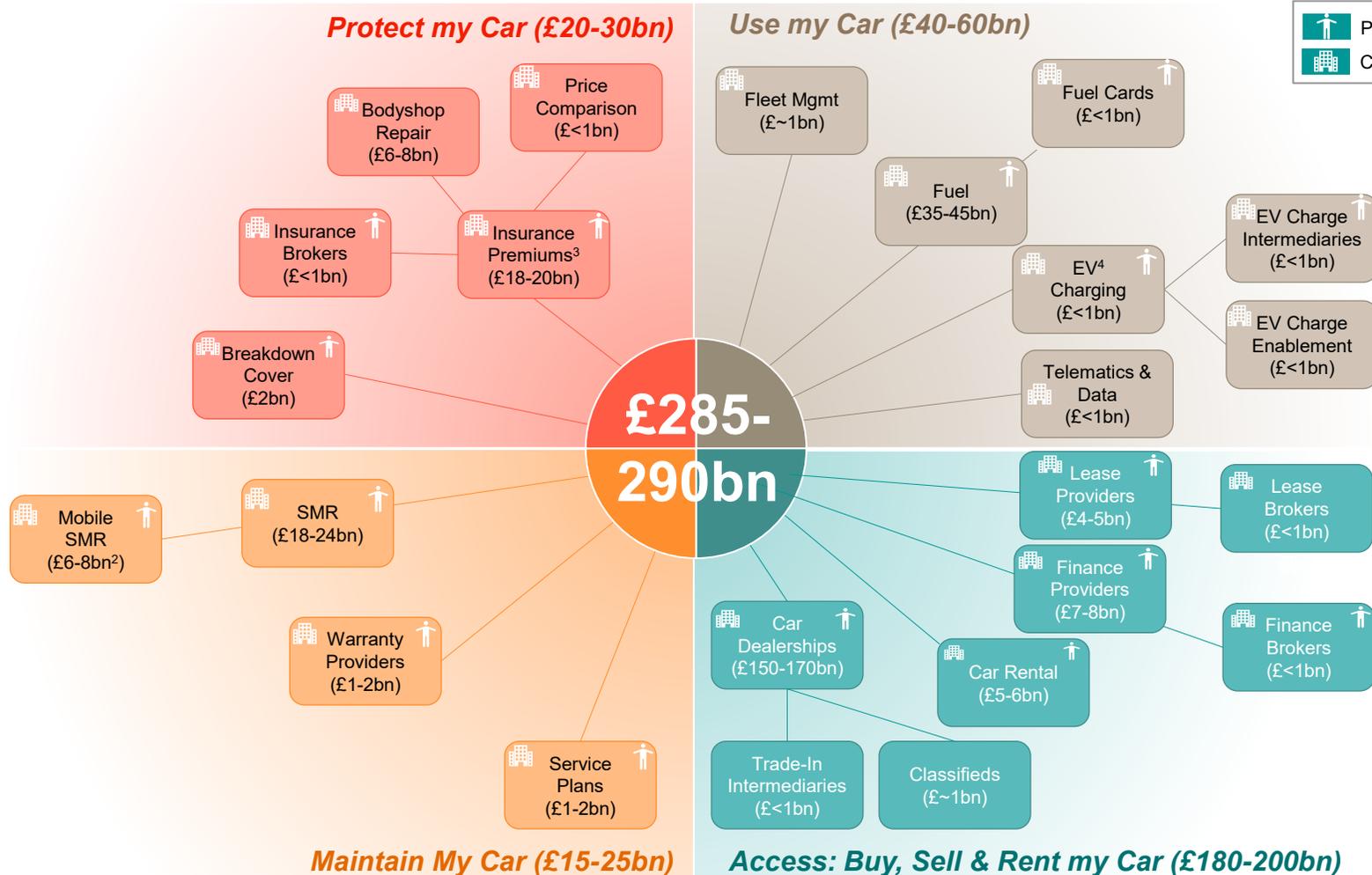
Source: OC&C Consumer Driving Services Survey October 2025, DfT, ONS, OC&C analysis



# Vehicles are serviced across a broad range of large markets, together making up the £285-290bn ecosystem of Driving Services

Driving Services Market: Total Spend<sup>1</sup> (£bn)

Not Exhaustive; Includes highest priority services



1. Customer spend, including e.g. VAT/IPT, where relevant  
Source: OC&C Market Model, OC&C analysis

2. Mobile SMR TAM rather than vended (<£1bn) as the market is nascent today

3. Private cars only (i.e. excludes commercial and LCVs)  
4. BEV, PHEV  
UK Driving Services - Trends and Perspectives | © OC&C Strategy Consultants 2025

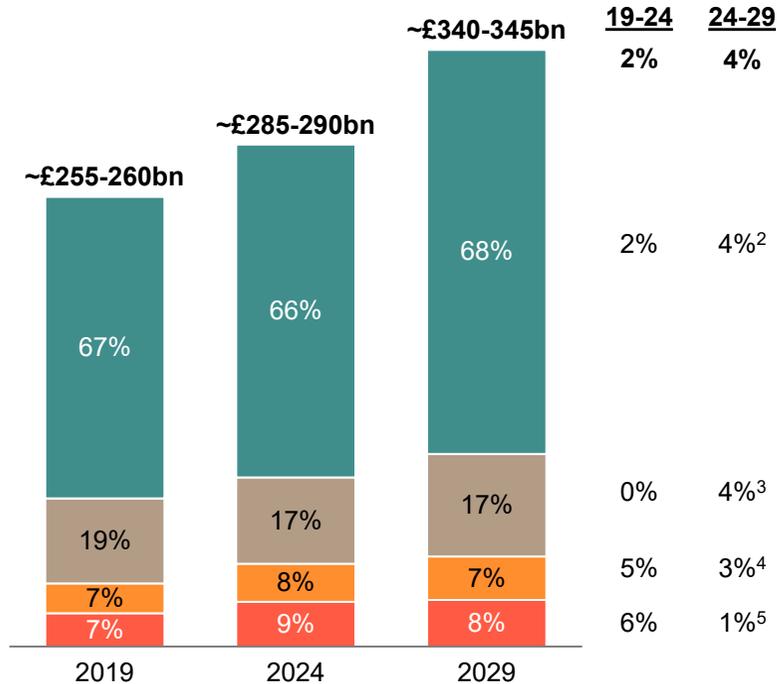
# The market is growing and still in the early stages of consolidation, with many weak brands and immature propositions still present

## Market Overview

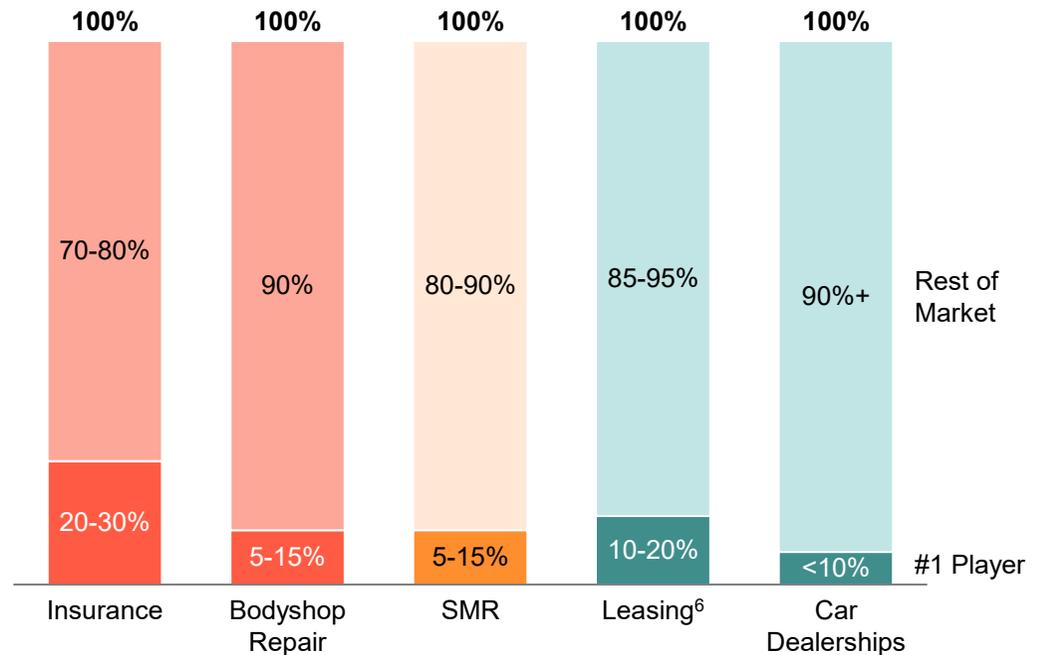
**Resilient growth of ~4% p.a. forecast to 2029**

**Markets are fragmented with low leader share, driving inconsistent propositions and service quality**

UK Driving Services Spend<sup>1</sup>, 2019-29 (£bn)



Top 1 Player Share by Service, 2024 (%)



Fragmentation has led to weak brands, variable / poor consumer propositions, and immature digital offerings

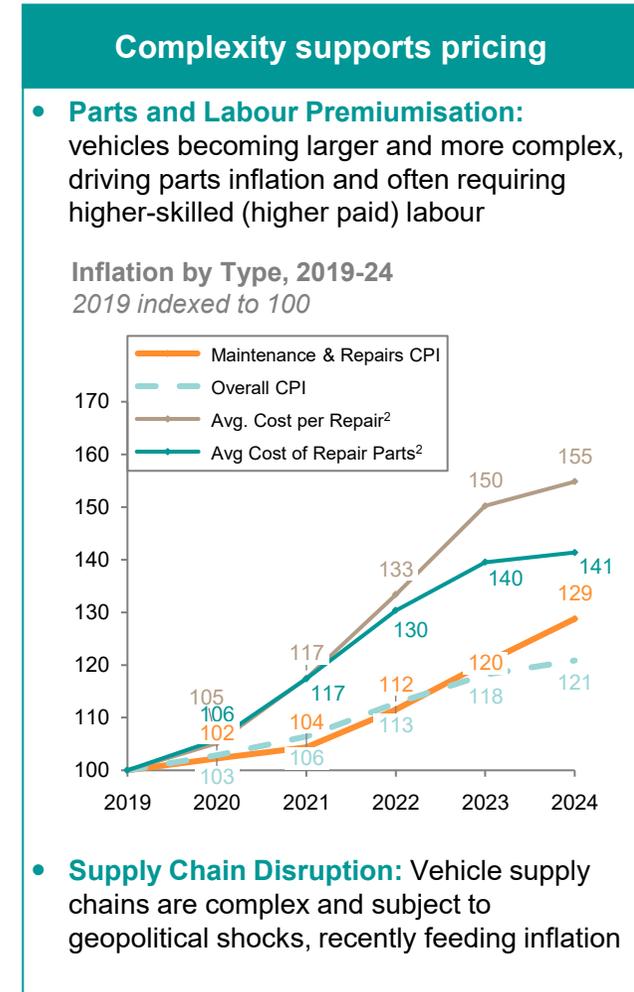
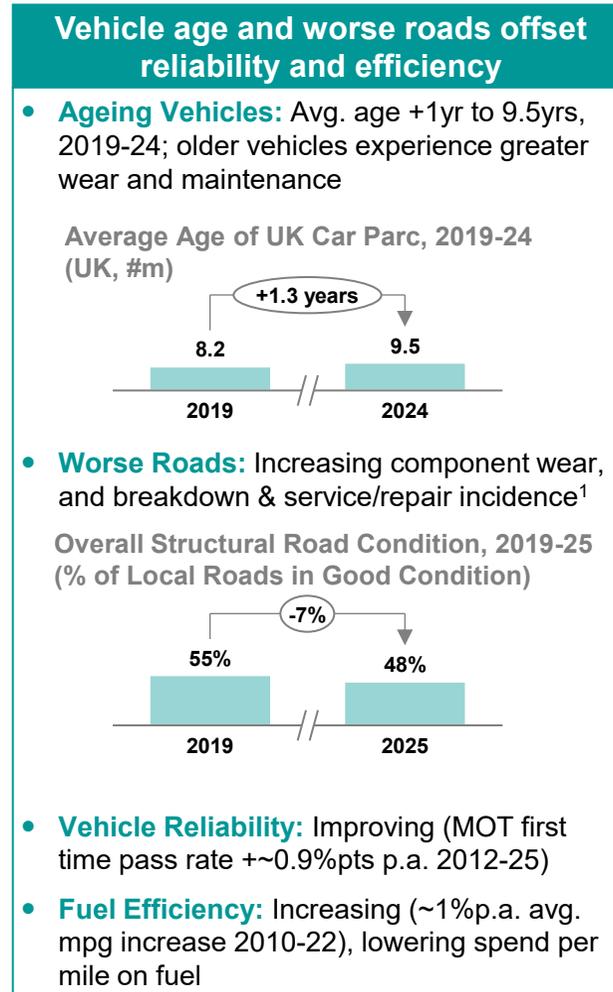
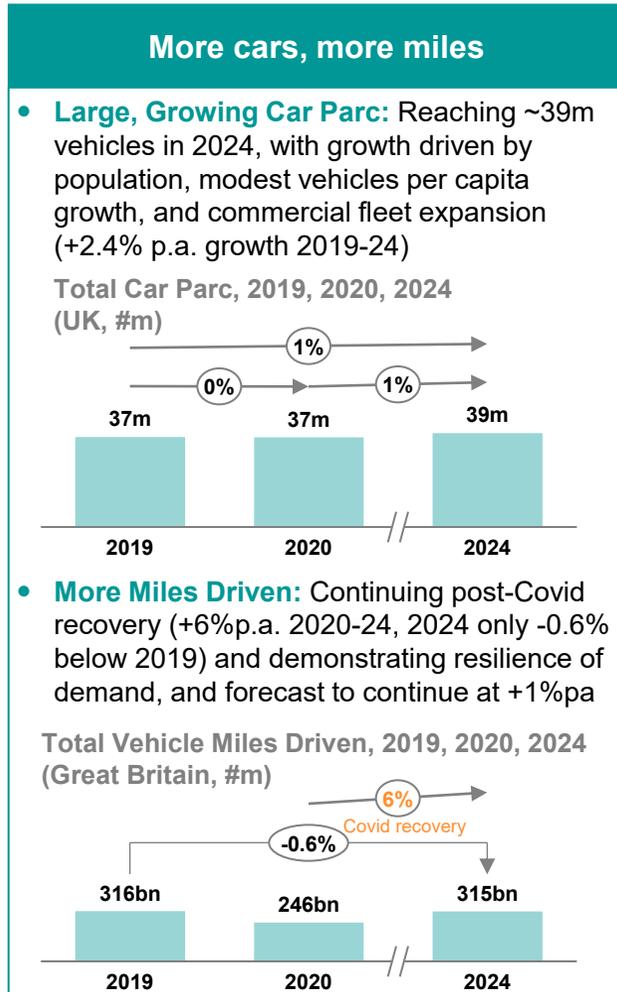
1. Customer spend, including VAT/IPT where relevant  
 2. Driven by rising new (2%p.a.) and used (1%p.a.) vehicle volume and inflation (3%p.a.)  
 3. Driven by 1%p.a. growth in total mileage and 3%p.a. inflation  
 4. Driven by underlying growth in the UK car parc and 3%p.a. inflation  
 5. Driven by Insurance GWP, with 9% 2024-25 decline offset by 2%p.a. growth 2025-29, though Breakdown grows faster (4%p.a.)  
 6. Calculated using fleet size due to data availability

Source: OC&C Market Model, OC&C analysis



# Market growth is supported by steady volume and price tailwinds

## Long-Run Growth Drivers

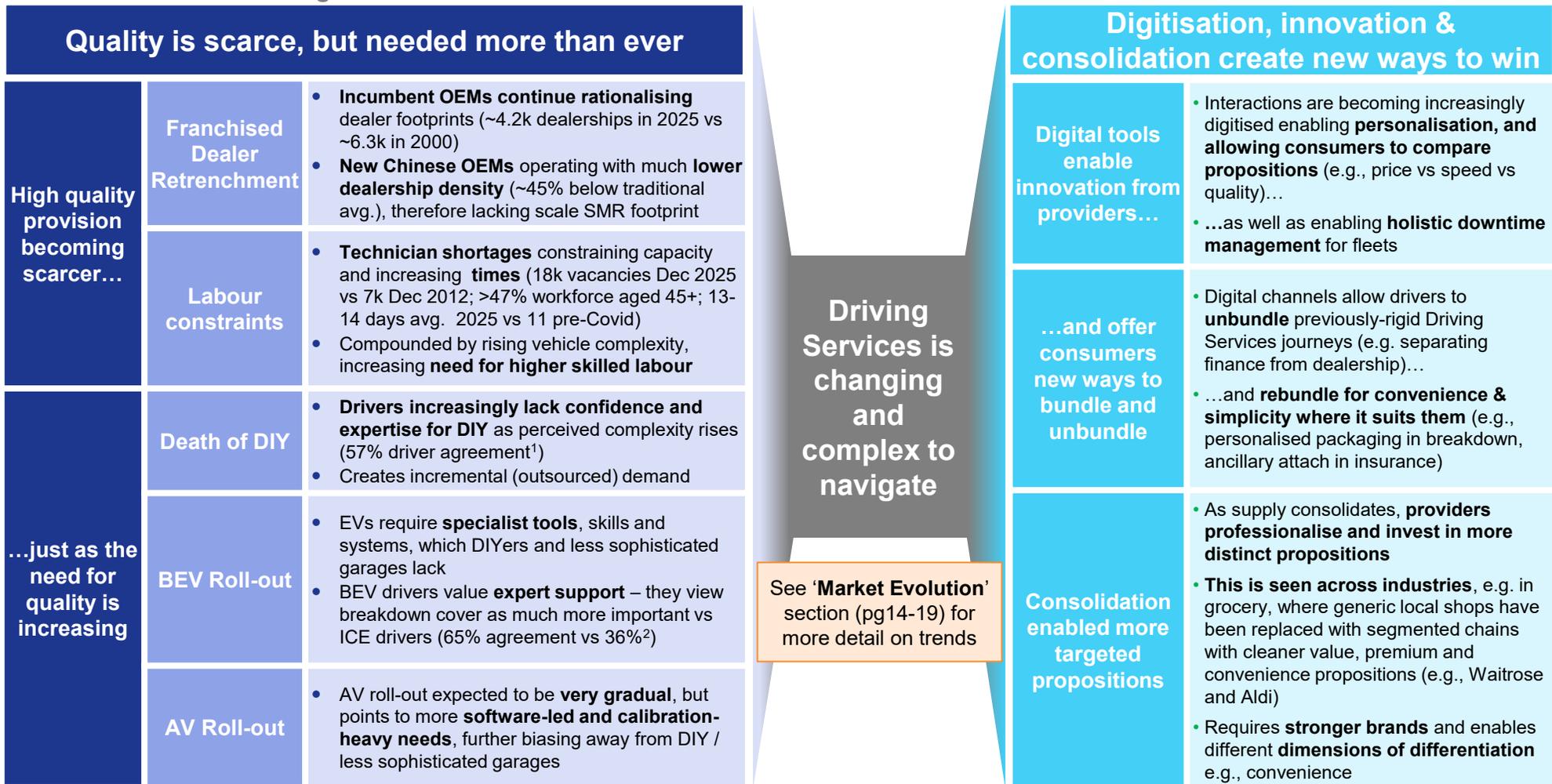


1. Service incidence refers to the frequency of repair and maintenance events per vehicle per year 2. Bodyshop repairs only, ABP estimate  
 Source: DfT, Oxford Economics, ALARM Survey Report (2021-2025), DVSA, ABP, OC&C analysis



# The market is also evolving and increasingly complex to navigate – with a flight to quality and digitally-led innovation

## Market Evolution in Driving Services



1. Q21: How do you feel about the technology in newer cars compared to those from 10 years ago?

2. How far do you agree with the following statement - breakdown cover is more important in an electric vehicle than in a traditional petrol/diesel powered car?

Source: OC&C Consumer Driving Services Survey October 2025, OC&C Consumer Breakdown Survey October 2025, DfT, Fleet News, OC&C analysis



# Driving Services winners will need trust, scale, and a simple, convenient digital experience, to navigate the evolving landscape

## Impact on Winning Factors

Established Winning Factors	 <b>Trust</b>	<ul style="list-style-type: none"> <li>Vehicles are viewed as <b>mission critical</b></li> <li>Drivers value <b>reliable brands</b> (83% agreement<sup>1</sup>), particularly in SMR, where Brand Trust is the #4 KPC<sup>2</sup>, and in Breakdown, where drivers say they get <b>reassurance from</b> knowing they have cover (85% agreement<sup>1</sup>)</li> </ul>
	 <b>Value</b>	<ul style="list-style-type: none"> <li>Drivers value clear and transparent pricing where they feel inexpert (Transparent Pricing is #6 KPC in SMR<sup>2</sup>)</li> <li>However, they are <b>relatively price insensitive</b> – they <b>prioritise quality</b> (80% agreement<sup>1</sup>) and <b>will pay for peace of mind</b> (68% agreement<sup>1</sup>)</li> </ul>
	 <b>Simplicity</b>	<ul style="list-style-type: none"> <li>Drivers struggle to manage the broad range of Driving Services - they value a <b>single reliable provider</b> over many (76% agreement<sup>1</sup>) and stick with <b>brands that make motoring simple</b> (75% agreement<sup>1</sup>)</li> </ul>
	 <b>Convenience</b>	<ul style="list-style-type: none"> <li>Drivers are time constrained and avoid unnecessary hassle when purchasing Driving Services</li> <li>They value <b>convenience</b> (top 3 factor for 39% of drivers when choosing SMR<sup>2</sup>), in line with their wider consumption behaviours (online share of UK retail 27% vs 8% in 2008) and increasingly look for providers who can come to them (c.f. home delivery) – to <b>save time and effort</b></li> </ul>
Emerging Winning Factors	 <b>Personalised &amp; Digital</b>	<ul style="list-style-type: none"> <li>Customers increasingly want <b>seamless app and web platforms</b> which allow them to manage and track services end-to-end (64% agreement<sup>1</sup>) – including account mgmt., booking and payment</li> <li>As connected technology develops, <b>digital tooling and data flows will become critical to great service delivery</b>, enabling remote diagnostics, scheduling and support</li> </ul>
	 <b>Scale, Serve Anywhere</b>	<ul style="list-style-type: none"> <li>75% of customers<sup>3</sup> show appetite for <b>nationwide solutions that can reach them anywhere</b> through a mobile ‘to you’ proposition – enabling fast service delivery direct to the driver (64% see saving time as key benefit<sup>4</sup>)</li> <li><b>Corporate customers</b> (OEMs, fleets, insurers, in future robotaxis) prefer national providers offering a quick, reliable and flexible service that minimises downtime and works around their operating model</li> </ul>
	 <b>Accredited Expertise</b>	<ul style="list-style-type: none"> <li><b>Rising vehicle and software complexity</b> (perceived by 57% of drivers<sup>5</sup>; e.g. BEV high-voltage and ADAS calibration) and regulation are increasing the value of expertise to customers</li> <li>Accredited technicians, processes and equipment demonstrate expertise to customers</li> </ul>

1. Q44: To what extent would you agree with the following statements? I get peace of mind from knowing I have cover / I'd rather a service that works than the cheapest / I get peace of mind from a reliable brand / I prefer one reliable provider over many / I stick with brands that make motoring simple and reliable / I get peace of mind from having access to simple digital tools to manage my driving services

2. Q32: When choosing where to have your car serviced or repaired, how important are each of the following? (Select top 3 factors)

3. Q40: If a mobile service were available for your next car service at the same price as your current provider, how likely would you be to use it? (Equally or more likely)

4. Q38: What do you see as the key benefits of mobile servicing and repairs? 5. Q21: How do you feel about the technology in newer cars compared to those from 10 years ago?

Source: OC&C Consumer Driving Services Survey October 2025, Desk Research, Mintel, OC&C analysis

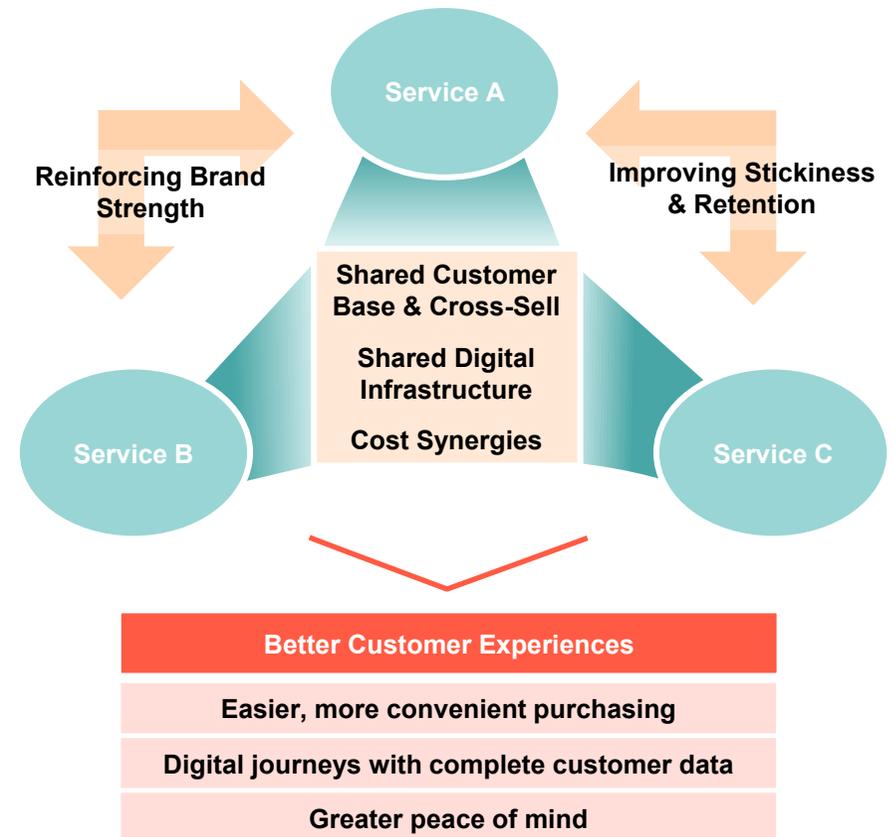
# Winners can leverage these attributes to combine naturally adjacent services into seamless propositions

## Potential Driving Service Platforms

There are natural groupings of complementary services within Driving Services

<b>Protect &amp; Maintain</b> (£35-55bn)	<ul style="list-style-type: none"> <li>• Bodyshop Repair (£6-8bn)</li> <li>• Breakdown (~£2bn)</li> <li>• Insurance (£18-20bn)</li> <li>• Service, Maintenance &amp; Repair (£18-24bn)</li> <li>• Warranty (£1-2bn)</li> </ul>
<b>Fleet Services</b> (£1-2bn)	<ul style="list-style-type: none"> <li>• Fleet Management - including management of in-life services and associated networks (~£1bn)</li> <li>• Telematics and Data (£&lt;1bn)</li> </ul>
<b>Buy &amp; Sell Ecosystem</b> (£160-180bn)	<ul style="list-style-type: none"> <li>• Classifieds / Marketplaces (~£1bn)</li> <li>• Dealerships (£150-170bn)</li> <li>• Finance &amp; Leasing (£10-15bn)</li> <li>• Trade-in Intermediaries (&lt;£1bn)</li> </ul>

Providers offering multi-service propositions can unlock material synergies, and create better customer experiences





# Agenda

UK Driving Services Market

**Market Evolution: Selected Deep Dives**

# Market Evolution: Growth in Chinese OEMs, along with traditional OEMs' network rationalisations are reducing dealership footprint and SMR capacity

## Drivers of SMR Site Retrenchment

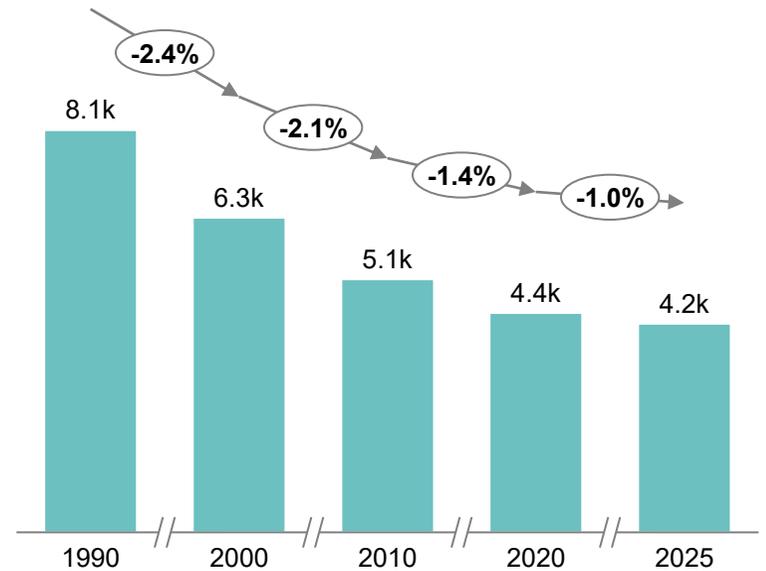
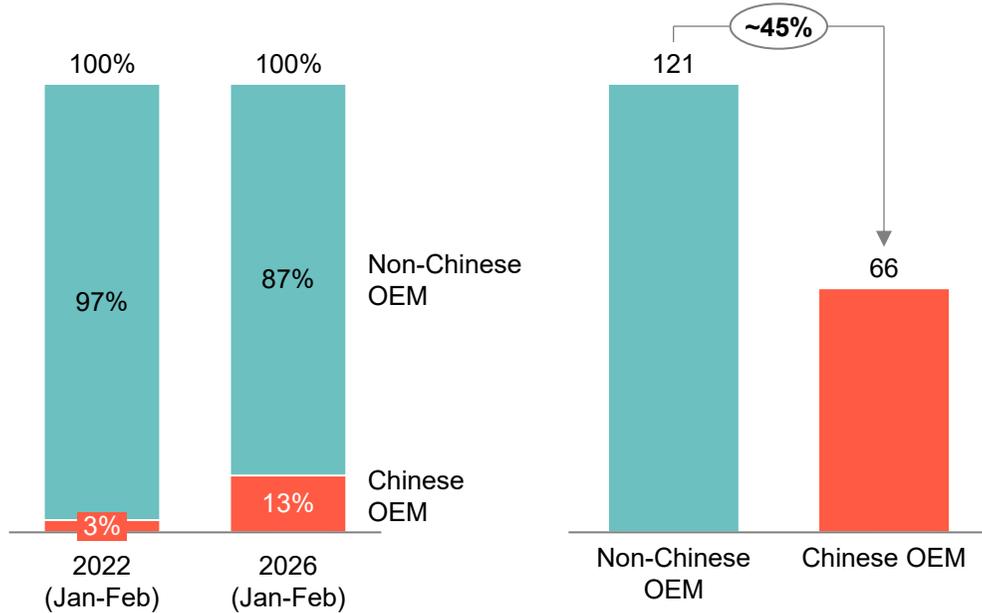
Market share is shifting to Chinese OEMs operating a different approach to last-mile infrastructure (~45% lower dealership footprint)...

...compounded by Western network rationalisation, reducing local SMR access and convenience

New Car Registration by OEM, 2022-26 YTD<sup>1,3</sup> (%)

Dealerships per OEM, 2025 YTD<sup>2,3</sup> (#,%)

Number of Franchised Dealerships, 1990-2025 (#)



Dealer networks are the **core OEM aftermarket network**, so lower dealer density **reduces SMR capacity** and increases the need for trusted, high-quality 3rd parties

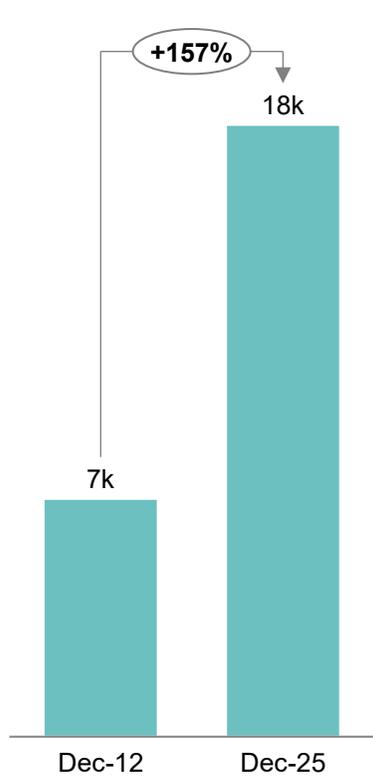
1. YTD Jan-Feb 2. YTD Jan to October 3. Chinese OEM: BYD, Changan, Chery, Geely, GWM, Jaecoo, Leapmotor, Maxus, MG, Omoda, Skywell, Smart, Xpeng  
Source: SMMT, AM Online, Savills National Franchised Dealer Association, OC&C analysis



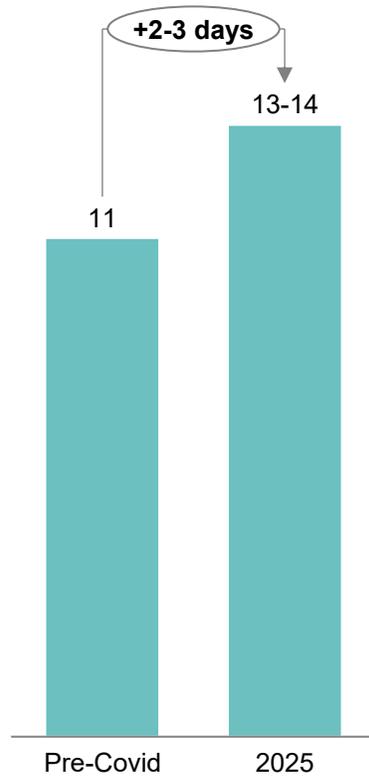
# Market Evolution: Labour shortages are exacerbating SMR supply constraints, impairing customer experience

## Labour Shortages

Number of Motor Trades Vacancies, Dec 2012-25 (#)



Average Wait Times for Garage, Pre-Covid vs. 2025 (# days)



Pressure on existing SMR networks

- Approximately 50k SMR providers nationally, **under multiple pressures** (eg, ageing workforces, skills gaps, need investment in new technologies), driving **closures of ~3-4k pa<sup>1</sup>**
- Exemplified by recent wind up of ATS Euromaster's UK operations in February 2026

Labour shortages further constraining supply

- There is a material **shortage of labour/technicians**, with ~18k vacancies today unfilled vs a workforce of ~600k (vs 7k vacancies 2012)
- The shortage is **expected to increase**, driven by ageing demographics (>47% of workforce is aged 45+) and a growing skills gap

Players able to access skilled labour (or create it through apprenticeships) can be highly differentiated

1. SIC45:452 gross exits, 2019-24 average

Source: IBIS World, ONS, The Institute of the Motor Industry, Fleet News, OC&C analysis

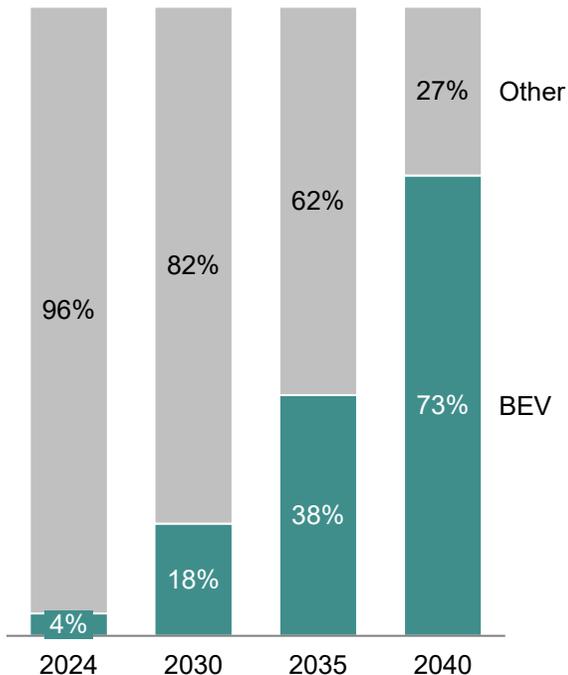


# Market Evolution: BEV roll-out in full parc expected to be gradual, with consumers nervous and seeking reassurance from trusted sources

## Impact of EVs

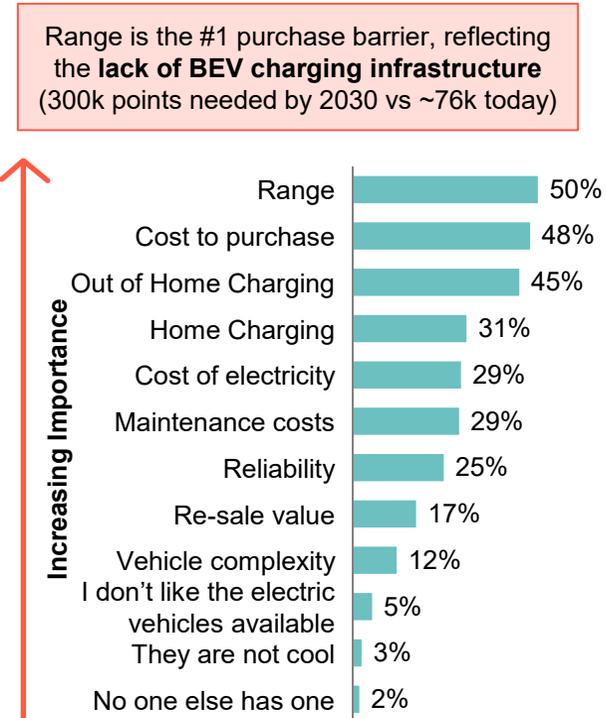
The car parc will shift gradually to BEVs over the next 15 years

BEV: Forecast Penetration of Car Parc<sup>1</sup>, 2024-40 (%)



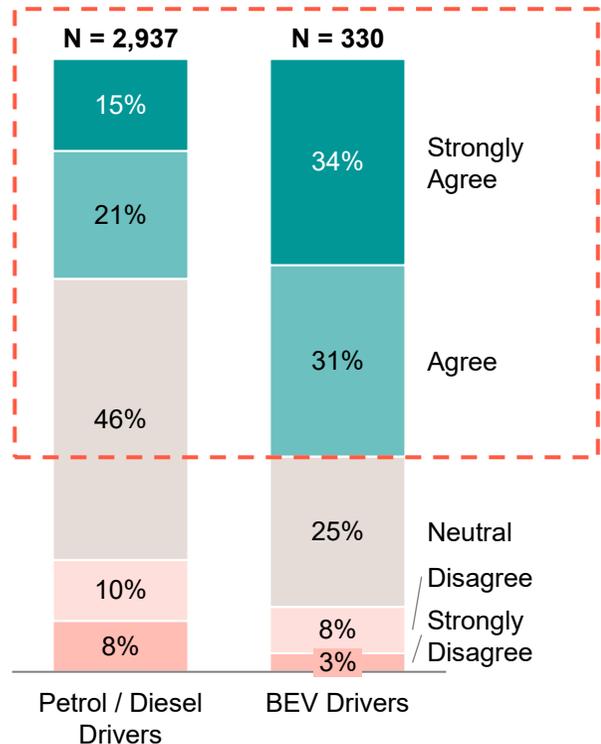
Consumers are anxious about complexity, reliability and range of BEVs

BEV Purchase Barriers<sup>2</sup> (% of Respondents)



BEV drivers view trusted, expert support – such as Breakdown cover – as much more important than for ICE drivers

Importance of BEV Breakdown Cover by Current Vehicle<sup>3</sup>, (% Respondents)



1. BEV forecast is inherently uncertain, with other adoption scenarios possible depending on e.g., regulation, price evolution, technology evolution

2. Q30: What are your biggest concerns when considering an electric vehicle? (N=2,005) 3. Q14: Roadside assistance providers are starting to carry equipment for charging and repairing electric vehicles. How far do you agree with the following statement - breakdown cover is more important in an electric vehicle than in a traditional petrol/diesel powered car?

Source: OC&C Consumer Driving Services Survey October 2025, OC&C Consumer Breakdown Survey October 2025, Fitch, GlobalData, Gov.UK, OC&C analysis



# Market Evolution: AVs likely to roll out slowly, and will create additional demand for quality Driving Services providers

## Impact of AVs

AV rollout will be slow

The first wave of AV rollout likely to be 'Robotaxis' only, and will mainly disrupt existing shared transport modes

- Robotaxis are **well-placed to take share from taxis** and public transit (cf. Uber entry, Waymo in SF) in urban areas – could represent ~2% of parc by 2040 (~2x taxis)
- However, **robotaxis unlikely to replace personal vehicles due to price premium and consumer preference**: ~60% would not give up their car for any price, seeing it as a personal space (75% agreement)

Eventually, Personal AVs will come, but forecasters suggest not material before 2035

- Several as-yet-unresolved barriers to broader AV adoption, including regulation, liability, tech, and price
- L4/L5 AVs forecasted to represent ~3% of *new* car sales by 2035<sup>2</sup>, but **represent a very small share of 2035 parc**
  - Parc turnover rates of ~6% p.a. means L4/L5 AVs will be <5% over the next 10+ years

AVs will be a tailwind in Driving Services

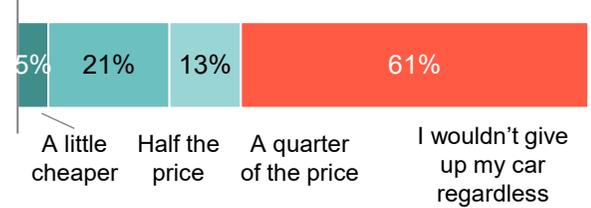
AVs will drive more miles

- **AVs expected to drive +25-30% more miles<sup>3</sup>** vs. human-operated vehicles (HOVs), increasing needs (e.g. SMR, fuel)
  - Longer trips become less onerous
  - Allows new trips (e.g. overnight / when drinking alcohol)
  - Empty repositioning between trips

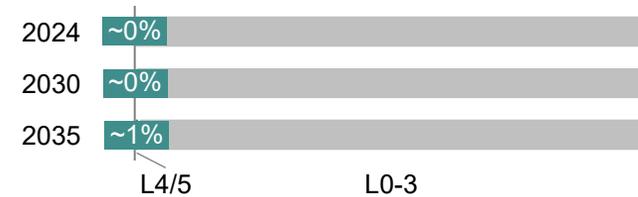
Increased need for quality Driving Services providers

- Complex liability & safety concerns likely to drive Insurers and OEMs towards **accredited and trusted suppliers**
- Approved SMR providers can be **trained & certified** to handle AV-specific issues, preventing safety-critical errors
- **Quality suppliers** can maintain traceable documentation and compliance & safety standards to minimise liability disputes

At What Price Would Consumers Switch to Shared<sup>1</sup>, (% of respondents)



Forecast ADAS Penetration of Car Parc<sup>2</sup>, 2024-35 (%)



Average Miles Driven: HOV vs L4/5 AV (000s miles)



### Example Outsourced Providers Used Today by Waymo



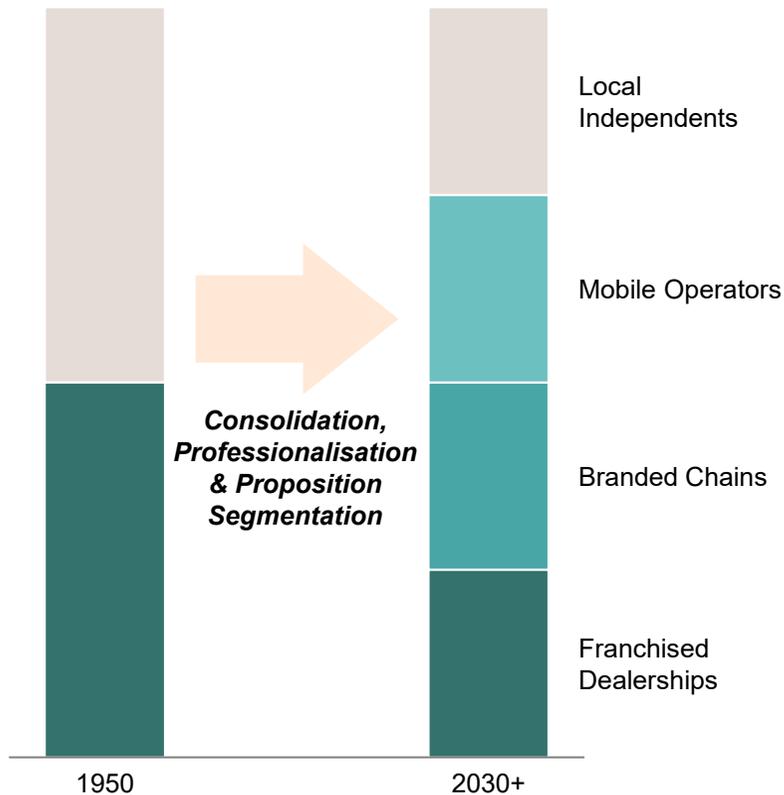
1. Q25: How much cheaper would a shared car have to be (all in) for you to totally give up your own car? 2. World Economic Forum report for AV % of new car sales. AV forecast is inherently uncertain, with other adoption scenarios possible depending on e.g., regulation, price evolution, technology evolution 3. Based on a variety of academic and industry studies - Harb et al. (2021), Taiebat et al. (2019), Wadud, MacKenzie & Leiby (2016), Childress et al. (2015) Source: OC&C Driving Services Survey October 2025, Bloomberg, World Economic Forum, Fitch, Gov.uk, SMMT, OC&C analysis UK Driving Services - Trends and Perspectives | © OC&C Strategy Consultants 2025

# Market Evolution: As markets consolidate, providers are more able to invest in segmenting their propositions, better serving consumers' needs

Consolidation and Segmentation

Indicative

Consolidation of SMR Landscape, 1950-2030+



		Market Ability to Meet	
		1950	2030+
Minimum Universal KPCs	Convenience (Location)	Common	Common
	Value (Price)	Variable	Common
	Capability	Variable	Common
Varying KPCs	Trust & Expertise	-	Variable
	Speed (Capacity)	-	Variable
	Ease (e.g. Digital)	-	Rare
	Bundling/Cross-Buying	-	Rare

When a market is fragmented, each business in the long tail is too small to invest in serving KPCs with less-than-universal appeal

As markets consolidate, suppliers professionalise – reducing variability in core delivery and raising the minimum standard

Suppliers can invest in more tailored propositions, and consumers can increasingly choose offers aligned to their specific preferences (e.g. around convenience, price or trust)



# Market Evolution: Consumers are increasingly able to unbundle and rebundle their Driving Services journeys, making the most of digital options

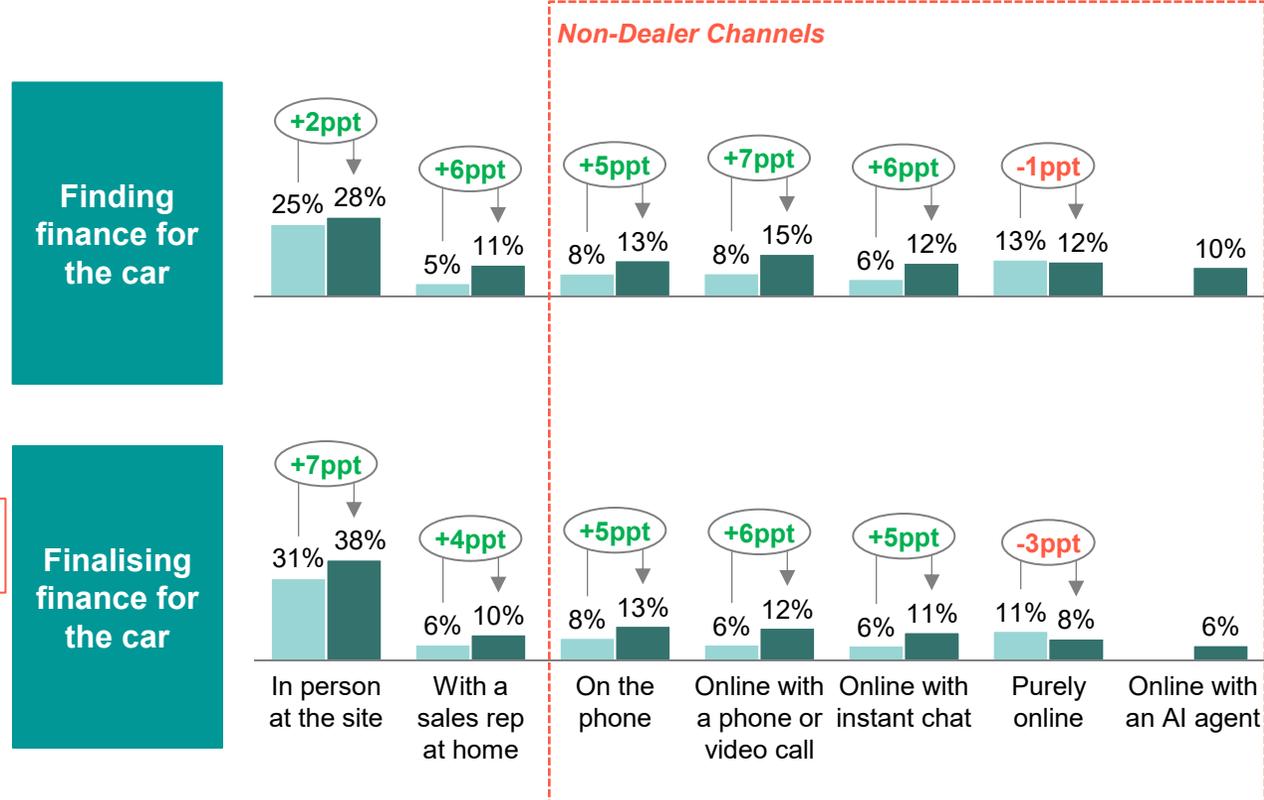
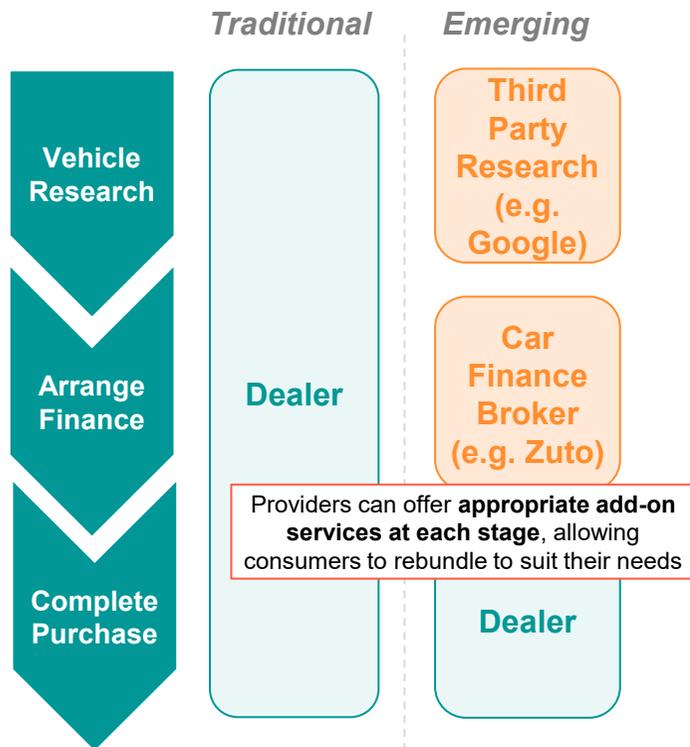
## Unbundling of Car Finance

The car purchase journey is evolving, with consumers relying less on dealers

They are increasingly likely to research and arrange finance through non-dealer channels

Dealer Role Across the Purchase Journey: Traditional vs Emerging

Channel Preference for Elements of Ancillary Purchase<sup>1</sup> 2022-26 (% Respondents<sup>2</sup>)



1. Q32: Thinking about the next time you do these activities, where would you prefer to do the following: research the car I want to buy / find the exact car I want to buy / purchase the car (pay for the car)

2. Excludes respondents who stated they do not expect to do this

Source: Desk Research, Speedometer Survey 2019-2026, OC&C analysis

