

Vehicle Recovery - UK - September 2012

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"The vehicle recovery market has recently passed through a difficult period. Membership has stalled with revenues under pressure from the combined effects of recession and increased competition. Finding a profitable way forward is clearly vital for all those operating in this sector."

– Neil Mason, Head of Retail Research

In this report we answer the key questions:

- **Can membership be increased?**
- **Are there opportunities to raise revenues?**
- **How does the market compete with a dominant AA?**
- **What next in the development of sales channels?**
- **How can the sector benefit from technology?**

The market for vehicle recovery services is at a mature stage in its development with recent years seeing stagnation in the number of consumers with membership of recovery services. Such a trend, coupled with the impact of the recent economic slowdown, has also had a negative impact on revenues which for 2012 are expected to be 5% down on 2007 levels.

Nevertheless holding some sort of vehicle recovery insurance remains important to many drivers with Mintel estimating that some 29 million have some form of vehicle recovery insurance in 2012. Although cover can be offered free of charge as part of bundling with the likes of financial products, many drivers still buy cover directly. Research has found that in such instances having the peace of mind that breakdown cover brings is by far the most important factor for holding this type of insurance.

This report covers vehicle breakdown recovery services available to private car owners, whether on a direct or indirect basis, as is common in the marketplace.

The value of the vehicle recovery services market is made up of fees from memberships and revenue from the ad hoc sector.

Membership fees comprise any premiums paid to ensure that a vehicle or person is insured in the event of a breakdown.

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