



Industry
Outlook
Conference

Session Three

2020 Industry Outlook

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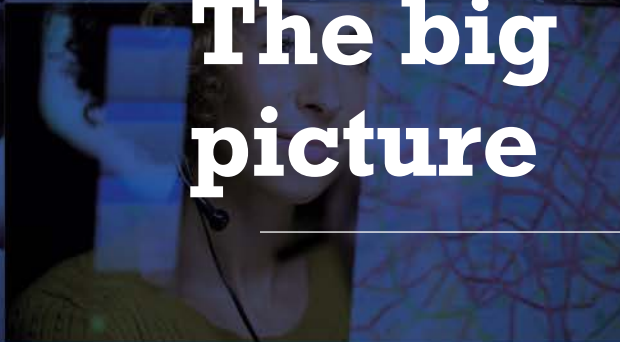
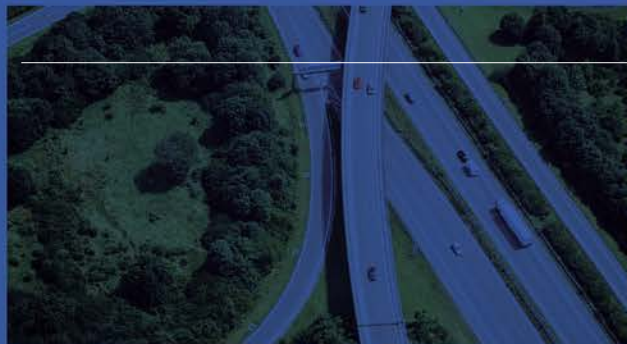
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The big picture



Company car consolidation

KEY 2020 TRENDS

- The transition to electric vehicles will lure grey fleet drivers into low mileage perk company cars
- Increased certainty on Benefit-in-Kind tax will halt the decline in company car numbers
- The company car will continue to lose its supremacy within business travel strategies



Taxation



Motor finance

Fleets within fleets

KEY 2020 TRENDS

- **Technology and data are levelling the playing field between small and large fleet providers**
- **Fleet consultants are an increasingly precious commodity**
- **Multiple touchpoints mean loyal customers**



Research and insight



Future mobility

Delivering digital

KEY 2020 TRENDS

- **The tussle over access to vehicle data will hold-back innovation in the fleet sector**
- **Sophisticated apps will automate more of the rental process, reducing the gap between car rental and car clubs**
- **Key administrative processes are being robotised, freeing up resource for more customer-facing roles**



Future mobility



Regulation and compliance

Elusive electric dreams

KEY 2020 TRENDS

- **The next Government will be under pressure to accelerate the decarbonisation of road transport by confirming long-term EV incentives**
- **2020 will see the launch of ‘turnkey’ products that combine the cost of the vehicle, charging infrastructure and fuel**
- **By the end of 2020, pure EVs will be responsible for 20% of new company car registrations**



Future mobility



Air Quality
and emissions

The diesel debate

KEY 2020 TRENDS

- RDE2 cars qualify for removal of the 4% BIK diesel surcharge
- Diesel's share of the BVRLA lease car fleet will fall below 50% in 2020
- Average new car CO2 emissions will rise for the fourth year running in 2020



Air Quality and emissions



Taxation

The mobility mix

KEY 2020 TRENDS

- **By the end of 2020, most OEMs will have a car subscription service**
- **The number of unmanned mobility-as-a-service hubs in busy public spaces will grow this year**
- **The concept of Mobility Credits will take-off as local authorities and employers look to encourage people out of their privately owned cars**



Future mobility

Clean air chaos

KEY 2020 TRENDS

- **Birmingham and Leeds will announce further delays to their Clean Air Zones**
- **Other cities will follow Bristol in looking to introduce diesel bans**
- **A number of cities will announce plans to introduce workplace parking levies**



Air quality and emissions



Future mobility

The cost of compliance

KEY 2020 TRENDS

- **Complaint levels will continue to rise as professional claims management companies target the rental and leasing sector**
- **The Government will push ahead with its plans to modernise consumer protection regulations**
- **The FCA will be keeping a close eye on the personal contract hire sector**



Professional development



Regulation and compliance

Pairing and repairing

KEY 2020 TRENDS

- **Electrical and software faults will drive a surge in vehicle safety recalls**
- **The choice of aftermarket repair outlet will increasingly be driven by service level and not cost**
- **Managing vehicle downtime will drive demand for predictive maintenance solutions**



Vehicle and road safety



Professional development

Panellists



Ben Lawson,
Enterprise
Holdings



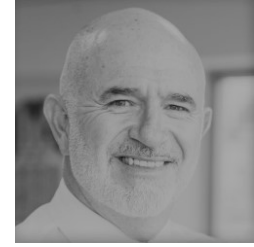
Caroline
Sandall,
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Vehicle
Management



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Final Thoughts

Thank you to our sponsors and exhibitors for supporting the event and making it a successful day.

Thank you to our expert speakers and delegates for participating in today's event.

Feedback: your feedback on this event is invaluable so please do spend a few minutes to complete the survey when you receive the email.

Presentations and Reports: you will receive an email with the links to these.

Safe journey home and see you at another BVRLA event soon!

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Save the date for 2020: 3 December

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