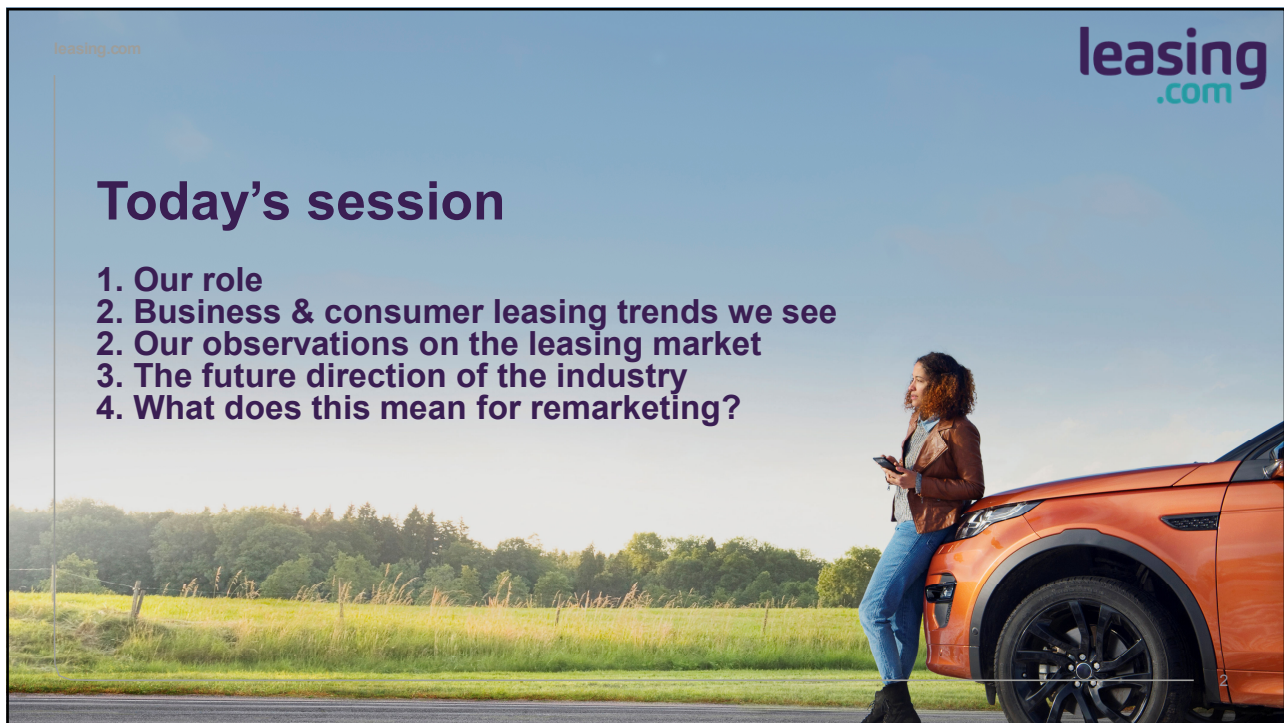


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Vehicle Remarketing Association,
14th March 2019

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Today's session

1. Our role
2. Business & consumer leasing trends we see
2. Our observations on the leasing market
3. The future direction of the industry
4. What does this mean for remarketing?

2

Our role

After 20 years, ContractHireAndLeasing.com became Leasing.com in February 2019

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We're an online marketplace for new car leasing.

We help consumers connect with our advertising partners.

We work with OEMs/funders to help their dealer and broker networks to win on our marketplace.

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Our partners

LeasePlan

EWFS
EASTERN WESTERN FLEET SERVICES

FREE2MOVE
LEASE

Santander
Consumer Finance

HITACHI
Inspire the Next

Inchcape

westover group
since 1925

Vertu
Motors plc

PETER VARDY
YOUR CAR COMPANY

Jardine Motors Group

Lookers
Customers for Life

Robins & Day
BY PSA RETAIL

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Behavioural trends

Key business and consumer trends seen on our marketplace

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Our service



36+ million page views & 3+ million users in the past 12 months.



13,000 sales enquiries per month.



80% of our audience are 25-54 year old males.

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Payment profile of enquiries

9 months advance rentals



52% petrol

23 month term



45% diesel

10,000 miles pa



3% AFVs

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Where's the demand?

Business leasing

42% of offers

25% of enquiries

c3,000 per month



Personal leasing

58% of offers

75% of enquiries

c10,000 per month

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PCH car offers: most searched brands in 2018

1. Mercedes-Benz
2. Audi
3. BMW
4. Volkswagen
5. Land Rover
6. Volvo
7. Jaguar
8. Ford
9. Skoda
10. Seat

Personal Mercedes-Benz Leasing Deals


Personal Business Cars Mercedes-Benz Select Model

Model	Deals	Prices From
C Class	45,603	£264.82 p/m
A Class	35,916	£215.99 p/m
E Class	17,774	£269.89 p/m
GLA Class	10,847	£194.99 p/m
B Class	9,366	£191.45 p/m



Mercedes-Benz Contract Hire and Leasing

Listing 1 to 10 of 139,553 Deals Found



Mercedes-Benz E Class Estate
E 200 AMG Line 5dr 9G-Tronic

£269.89 p/m

Initial Rental: £2,429.01
Additional Fees: £785.00
Total Lease Cost: £12,074.16
All prices inc. VAT

9 Months

36 months

8,000 p/a

Transmission: Automatic

Fuel Type: Petrol

Road Tax: Fully Included

Maintenance: Not Included

Offered by: LV Contracts

Leasing.com value rating: 5.0

[View deal](#)

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BCH car offers:

most searched brands in 2018

1. Mercedes-Benz
2. Audi
3. BMW
4. Land Rover
5. Volkswagen
6. Jaguar
7. Volvo
8. Porsche
9. Ford
10. Nissan

Business Mercedes-Benz Leasing Deals

Model	Deals	Prices From
C Class	30,026	£220.53 p/m
A Class	17,402	£179.99 p/m
E Class	8,857	£224.91 p/m
S Class	8,381	£159.54 p/m
GLA Class	6,220	£170.62 p/m

Mercedes-Benz Contract Hire and Leasing

Listing 1 to 10 of 89,759 Deals Found

Best Value

Mercedes-Benz E Class Estate
E 200 AMG Line 5dr 9G-Tronic

£224.91 p/m

INITIAL RENTAL: £3,024.19
ADDITIONAL FEES: £165.83
TOTAL LEASE COST: £30,961.87

Leasing.com value rating: ★★★★★

Offered by: LV Contracts

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BCH van offers:

most searched brands in 2018

1. Ford
2. Volkswagen
3. Mercedes-Benz
4. Nissan
5. Mitsubishi
6. Citroen
7. Toyota
8. Peugeot
9. Fiat
10. Vauxhall

Business Ford Leasing Deals

Model	Deals	Prices From
Transit	84,317	£393.57 p/m
Transit Custom	50,029	£399.99 p/m
Transit Connect	10,638	£368.28 p/m
Ranger	4,807	£223.81 p/m
Transit Courier	2,062	£340.35 p/m

Ford Contract Hire and Leasing

Listing 1 to 10 of 124,756 Deals Found

Best Value

Ford Transit 350 L4 Diesel Fwd
2.0 TDCI 130ps One Stop Luton Van Auto


£277.83 p/m

INITIAL RENTAL: £833.49
ADDITIONAL FEES: £8,000
TOTAL LEASE COST: £3,201.56

Leasing.com value rating: ★★★★★

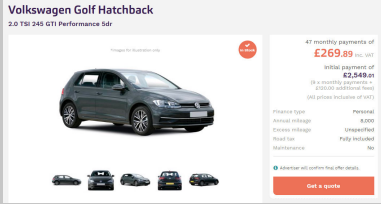
Offered by: Evans Halshaw Ford Van Centre Preston

Make/model demand in 2018



Top Ten Brands

1. Mercedes-Benz
2. BMW
3. Volkswagen
4. Audi
5. Land Rover
6. Volvo
7. Ford
8. Nissan
9. Jaguar
10. Seat



Volkswagen Golf Hatchback
2.0 TSI 245 GTI Performance 5dr

47 monthly payments of **£269.89** inc. VAT
Initial payment of **£2,549.01**
18 x monthly payments of £1,000.00 (incl. VAT)
800 miles included (incl. VAT)


Finance Type	Personal
Annual mileage	8,000
Deposit included	Unspecified
Road tax	Fully included
Maintenance	No

[Get a quote](#)

Top Ten Models

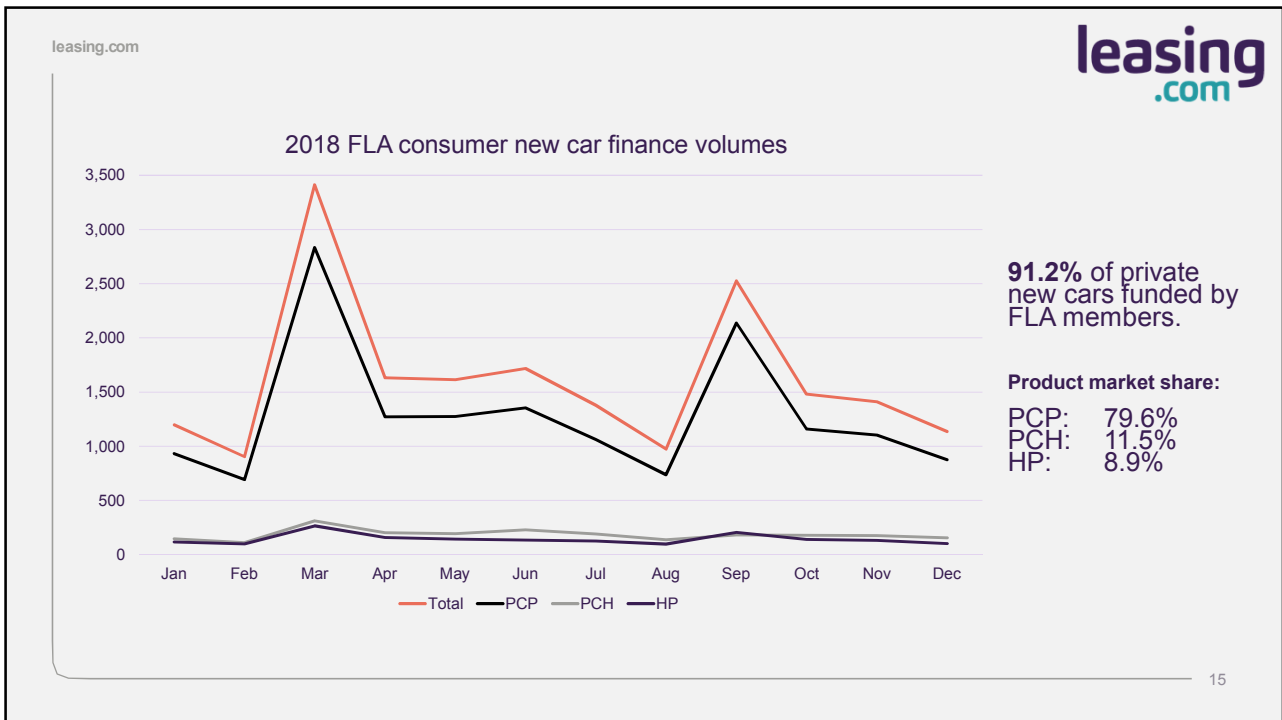
1. Golf
2. A-Class
3. C-Class
4. Tiguan
5. E-Class
6. A5
7. Qashqai
8. 5 Series
9. Velar
10. A4

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Market observations

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BVRLA Members 2018 Fleet Data

- Business fleet down 1% in 2018 to 2.65 million vehicles
- Personal fleet up 14% to 1.89 million vehicles

BVRLA Q4 2018 Leasing Survey

- Total car leasing down 4% in Q4 2018. PCH up 24% in same period
- Average leasing term of 36 months (cars) / 48 months (vans)
- Average leasing mileage of 15,000 (cars) / 16,000 (vans)

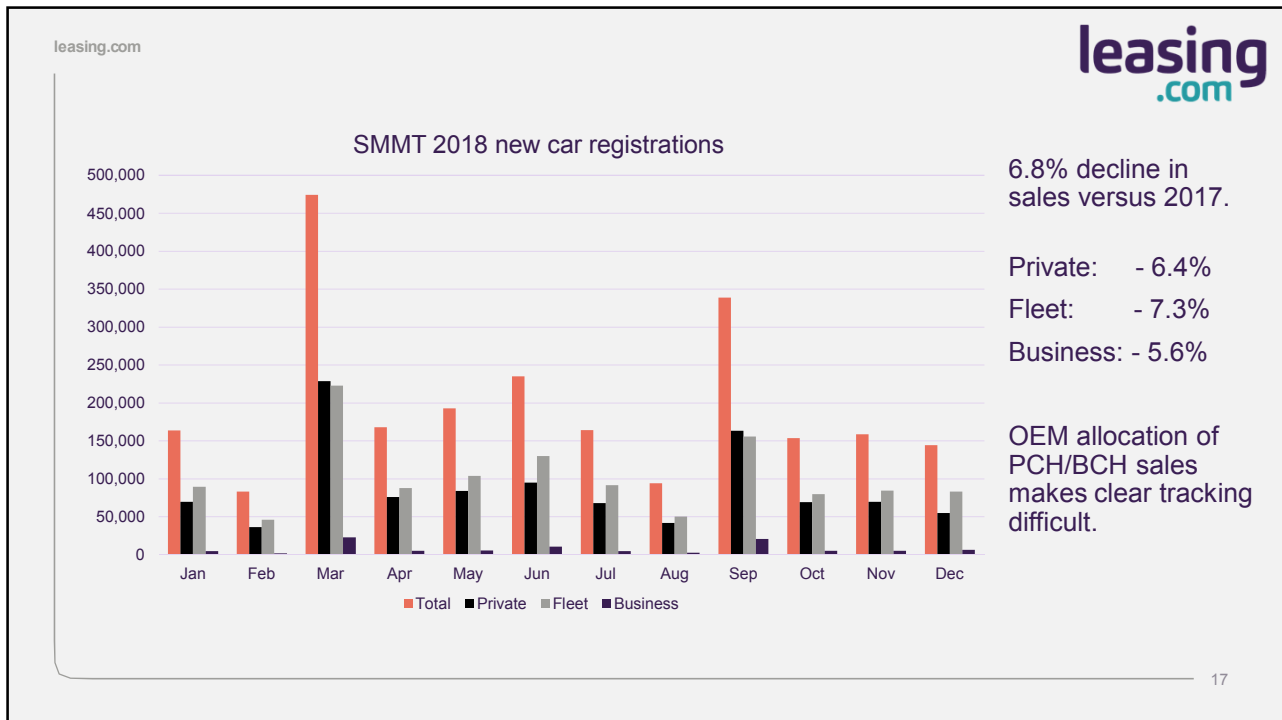
BVRLA H2 2018 Leasing Broker Statistics

- 341 leasing broker members
- 57% of outstanding contracts are PCH, and 38% BCH
- 64% of new contracts were PCH in 2018, and 33% BCH

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- The ongoing impact of WLTP on real-world CO2 emissions and stock availability
- A more punitive BIK regime for company car drivers
- The growth of PCH affinity schemes in response?
- Broader transition from owning to using by consumers
- Prevalence of agile online brokers
- Slower adoption of leasing by franchise dealerships
- Emerging interest in used vehicle leasing

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Future direction of the industry...

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- Digital is removing known consumer pain points
- Tech now exists to deliver genuine e-commerce, and many consumers are confident to transact online
- Finance is the enabler to online transactions
- Subscription services have emerged as consumers prioritise flexibility and convenience
- 'Short-term hire' requires effective utilisation of vehicles, supported by strong logistics network
- Crucial, but ever-changing role of dealers

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What does this mean for vehicle remarketing?

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- WLTP causing delays in new car sales/deliveries
- Increase in dealer demand for nearly-new stock
- Fleets/consumers extending existing lease agreements
- Knock-on impact on used car demand/prices
- Growth in personal leasing provides guaranteed supply
- Digitalisation & efficiencies in leasing company remarketing practices
- B2C used vehicle leasing propositions

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