

# Automotive Retail CONGRESS

BROUGHT  
TO YOU BY **AM**

UNDERSTAND THE NEW RETAIL LANDSCAPE

TUESDAY MAY 21, 2019

RICOH ARENA, COVENTRY

## 2019 AGENDA

Time	Session
09.00 - 09.30	Registration and Exhibition
<b>The Automotive Retail Outlook 2021</b>	
09.30 - 09.40	Welcome and Introduction  <b>Tony Whitehorn</b> , Executive Advisor, Former President & CEO, <b>Hyundai Motor UK</b> (Chair)
09.40 - 10.00	<b>The UK Automotive Forecast</b> Outlook for new and used car sales taking into account volume, sector demand, EV Hybrid adoption, impact of government policy.  <b>Mike Jones</b> , Chairman, <b>ASE</b>
10.00 - 10.20	<b>The Motor Finance Outlook</b> Consumer credit is the fuel of the new car market. PCP and PCH have led the way in product innovation, making cars more affordable. The industry has changed its sales practices too, with better training and new reward structures. But in light of the recent Financial Conduct Authority review of motor finance, the regulator is likely to demand further changes. This session will examine the review and guide dealers on its likely consequences.  <b>Andrew Smith</b> , Managing Partner, <b>Paxen Group</b>
10.20 - 10.35	Q&A
10.35 - 10.55	<b>The Outlook After Brexit</b> The biggest issue on the agenda for all businesses is the impact of Brexit and its effect on the UK's economy and consumer confidence. Now with two dates on the table—12 April for a no deal and 22 May for a deal, to leave the EU, uncertainty still reigns. <ul style="list-style-type: none"> <li>• Examining how manufacturers have been preparing for the worst with brands making decisions to invest elsewhere hitting the headlines.</li> <li>• What will be the implications for the sector and UK business as a whole?</li> <li>• Drawing on his co-authored book 'Keeping the Wheels on the Road—UK Automotive after Brexit', what will the sector be up against in the Brexit aftermath?</li> <li>• Bailey will aim to deliver as much clarity and insight as possible to what is currently an ever-shifting landscape.</li> </ul> <b>Professor David Bailey</b> , Professor of Business Economics, <b>Birmingham Business School</b>
10.55 - 11.05	Q&A  <b>Professor David Bailey</b> , Professor of Business Economics, <b>Birmingham Business School</b>
11.05 - 11.35	Break and Exhibition

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The 2030 Automotive Retail Market	
11.35 - 11.55	<p><b>New Car 2030</b></p> <p>Responsible for the automotive retail value chain at McKinsey in the UK, Carlutti explores the future of mobility by focusing on four main elements of disruption that will change the automotive outlook completely—electrification, connectivity, autonomous driving and shared mobility.</p> <ul style="list-style-type: none"> <li>• How could the automotive sector look in the next decade?</li> <li>• In an industry focused on delivering the next quarter's results, how should dealers and OEMs respond to changes in consumer attitudes, technology and disrupters?</li> <li>• What exactly is on the horizon and how should the sector act before it's too late?</li> <li>• What ways can dealers and OEMs start preparing for the changes ahead?</li> </ul> <p><b>Cristiano Carlutti, Associate Partner, McKinsey &amp; Company</b></p>
11.55 - 12.15	<p><b>Used Car 2030</b></p> <p>Exploring a number of trends, Nothard will look at how the evolving new car market, increasingly sophisticated digital technologies and changing consumer behaviours will transform the used car market.</p> <ul style="list-style-type: none"> <li>• The continual decline of diesel and how the rise of AFVs and EVs will impact the used sector</li> <li>• How the growth of PCH will affect new car registrations and ultimately the used market</li> <li>• Ways in which some dealers are already responding by broadening their business</li> <li>• The emergence of a radically different and digitally sophisticated wholesale market</li> </ul> <p><b>Philip Nothard, Customer Insight and Strategy Director, Manheim Remarketing</b></p>
12.15 - 12.35	<p><b>The Aftermarket in 2030</b></p> <p>Against a backdrop of declining repair and maintenance volumes, competition between the OEM-franchised and independent aftermarket sectors is growing ever-fiercer as electrification, connectivity and eventually autonomy are added into the mix. Looking ahead towards 2030, what will the coming changes to the aftermarket mean for customers, both individual and fleet, and for the providers of service?</p> <ul style="list-style-type: none"> <li>• Evidence suggests that early adopters of EVs are conscientious about maintenance, and loyal to the OEM-franchised networks, but will this still be the case as EVs hit the mainstream?</li> <li>• All new cars, and a growing proportion of the overall parc, will be 'connected' by 2030, but will regulation limit how connectivity can be used to increase retention?</li> <li>• If service-inclusive leases and shared-use mobility fleets continue their growth, over 50% of the UK car parc could have its aftermarket needs under 'professional management' by 2030. Will customers become disconnected from the whole repair and maintenance 'world'?</li> </ul>

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	<ul style="list-style-type: none"> <li>Just how far could repair and maintenance volumes fall by 2030, and what impact could this have on workshop and network viability?</li> </ul> <p><b>Dr. Andrew Tongue</b>, Research Director, <b>ICDP</b></p>
12.35 – 13:00	Q&A
13:00 - 14.10	<i>Lunch, Networking &amp; Exhibition</i>
<b>Automotive Retail Business 2030</b>	
14.10 - 14.30	<p><b>The Investment View</b></p> <p>Insights into where investment is focused and could be directed and how dealers can remain attractive to shareholders, this session considers a host of changes such as fewer dealerships, even more tech start-ups emerging and manufacturer and dealer investment.</p> <ul style="list-style-type: none"> <li>How will the network be restructured such as smaller, less economically viable dealerships disappearing and the larger retail centres responsible for larger areas.</li> <li>What other types of tech start-ups will have the automotive sector in their sights?</li> <li>What will industry investors look for in the coming decade including challenges surrounding ownership and changing consumer behaviour?</li> <li>Will manufacturer investment focus on research and development of new technology, connectivity and self-driving vehicles and will the network have to invest further to maintain a brand's retail presence?</li> </ul> <p><b>Mike Allen</b>, Head of Research, <b>Zeus Capital</b></p>
14.30 - 14.50	<p><b>The Disrupter View</b></p> <p>As an industry advisor on financial services and technological strategies, Ed White teamed up with David Betteley, a recent global board member at Jaguar Land Rover and a former chair of the Finance and Leasing Association (FLA), to launch new mobility start-up Tomorrow's Journey.</p> <ul style="list-style-type: none"> <li>How can dealers turn underutilised vehicles into a revenue stream?</li> <li>How can dealers experiment with Mobility as a Service (MaaS) solutions and start creating new offerings?</li> <li>Can dealers utilise its demo fleet to fulfil short-term rental requirements or create products that allow access to different vehicles at different times?</li> <li>How can the traditional retail model combine with the emerging mobility as a service trend?</li> </ul> <p><b>David Betteley</b>, Chairman, <b>Tomorrow's Journey</b>  <b>Ed White</b>, Group Chairman, <b>White Clarke Group</b></p>
14.50 – 15.00	Q&A
15.00 – 15.20	<p><b>The MaaS View</b></p> <p>What opportunities do service providers see in Automotive Retail?</p> <p><b>Chris Lane</b>, Head of Transport Innovation, <b>TfWM</b></p>
15.20 - 15.40	<b>Car sharing and MaaS: the role of European Automotive Dealers</b>

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	<p>The increasing importance of e-commerce, the innovative vehicle technology, and the fast-changing attitude of people towards individual mobility, are putting the automotive dealers' traditional business model under serious pressure.</p> <ul style="list-style-type: none"><li>• Is car sharing and Mobility as a Service (MaaS), and more generally the provision of mobility services to the customer, a possible way to reduce the dealer's dependency from the vehicle sales' weak margins?</li><li>• Are automotive dealers well-equipped to successfully penetrate those emerging markets?</li><li>• What is the competitive position of the automotive dealers as opposed to other players who have already entered these markets before?</li><li>• Are there, among the dealer's traditional assets and capabilities, some elements which are relevant to the provision of a mobility service?</li><li>• How does the experience, of those European dealers who have already launched some initiatives in the field of shared mobility services, help us answering the above questions?</li></ul>
	<p><b>Giuseppe Marotta</b>, CEO, <b>BeMobility</b></p>
<b>15.40 – 15.50</b>	Q&A
<b>15.50 - 16.10</b>	<p><b>The Adapter View</b> How can companies win in the new environment?</p> <p><b>Nick Kerigan</b>, Managing Director, Future Payments in Cards &amp; Payments, <b>Barclays Partner Finance</b></p>
<b>16.10 - 16.20</b>	Q&A
<b>16.20 - 16.30</b>	<p><b>Closing Remarks</b></p> <p><b>Tony Whitehorn</b>, Executive Advisor, Former President &amp; CEO, <b>Hyundai Motor UK</b> (Chair)</p>
<b>16.30 - 17.00</b>	<i>Exhibition</i>