Consumer Automotive Financial Services in Italy 2016

Description: Consumer Automotive Financial Services in Italy investigates the market for automotive financial services linked to sales of new and used passenger cars to individual buyers in Italy. In addition to analysing the market for finance and leasing services, the study also covers creditor insurance, motor insurance, road assistance, extended warranties, prepaid service contracts and GAP insurance, plus stand-alone driver accident and vehicle running costs insurance.

Using survey results for average take-up rates for finance and leasing propositions at the point of sale, data for the size and growth of the automotive finance and leasing market for consumers in Italy is provided in terms of gross advances and assets leased for 2011 to 2015 with splits between finance for new and used cars and between finance organised through dealerships at the point of sale and directly with banks or other lending institutions.

Moreover, also by means of data for average take-up rates, the markets for creditor insurance, motor insurance, road assistance, extended warranties, prepaid service contracts, GAP insurance, driver accident insurance and vehicle running costs insurance are sized in terms of gross written premiums and other revenues sold through the automotive trade (i.e. via dealers and manufacturers) in 2015. These markets, estimated to be worth EUR 1.98 billion in total in 2015, are broken down between new and used cars, and between new contracts sold during 2015 and in-force business sold in previous years but still being renewed in 2015.

The report draws on a survey of 85 leading car dealerships as well as an analysis of the approach to consumer automotive financial services of 44 car manufacturer brands in Italy. The PartnerBASE™ dataset that accompanies the report details each of the marketing initiatives for consumer automotive financial services traced by Finaccord for both dealers and manufacturers; a market data annexe is also available in a convenient spreadsheet format so that there is no need to re-enter key data points from the report.

In addition to captive finance companies owned by manufacturer brands, organisations covered by the report include ACI, Agos Ducato, AXA, Carfull Service, CarGarantie, Compass, Covéa Fleet, Direct Line, Europ Assistance, Fiditalia, Findomestic, GE Capital Servizi Finanziari, Genworth Financial, Helvetia, MAPFRE Warranty, Nobis, Santander Consumer Bank, The Warranty Group, UnipolSAI and Zurich. Together, the report and database will provide you with the definitive guide to current and future opportunities in consumer automotive financial services in Italy.

Contents:

Executive Summary

1. Introduction
   - What is this report about?
   - The focus of the report is on financial services related to the sale of passenger cars to individuals
   - Rationale
   - The provision of financial services is essential to support both car sales and profitability
   - This report offers a detailed updated analysis of the subject in Italy based on primary research
   - Methodology
   - Survey of dealers and manufacturers
   - Market data
   - Computation of market data is based on a complex set of assumptions and variables
   - in order to provide market segmentations in unrivalled detail
   - External sources
   - Definitions
   - Finance and leasing products
   - Insurance, warranty and assistance products
   - Operating models
   - Tied and non-tied providers
   - Abbreviations
   - PartnerBASE and market data annexe
2. Market Analysis
- Introduction
- Passenger vehicle data
- Sales of new cars picked up in both 2014 and 2015...
- as did those of used cars
- Fiat Chrysler remains dominant in terms of new car sales
- Consumer automotive finance and leasing market
- Market size and growth
- In terms of the volume of contracts, direct lending for used cars is the largest segment...
- although point-of-sale finance for new cars is comfortably the largest by value
- Types of finance and leasing product
- Almost 70% of private car finance takes the form of simple loans with no option to return the vehicle
- The popularity of finance leases has increased substantially since the previous survey in 2013
- Consumer automotive insurance, warranty and assistance markets
- Market sizes
- In total, the automotive trade is likely to have sold contracts worth around EUR 2 billion in 2015
- Survey of automotive dealers and manufacturer brands - overview
- Introduction
- Provision of consumer automotive financial services
- Provision rates for GAP insurance and prepaid service contracts have increased since the last survey
- Number and nature of dealer schemes
- Dealers have increased somewhat their willingness to use non-tied finance and leasing providers...
- and the average number of providers used for motor insurance has also risen
- Types of creditor insurance policy sold by dealers

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