

2017



# Geo Business Seminar



# WELCOME

# **Paradigm Change in the Automotive Industry**

**How spatial data can help us predict the  
future of mobility and car sales**

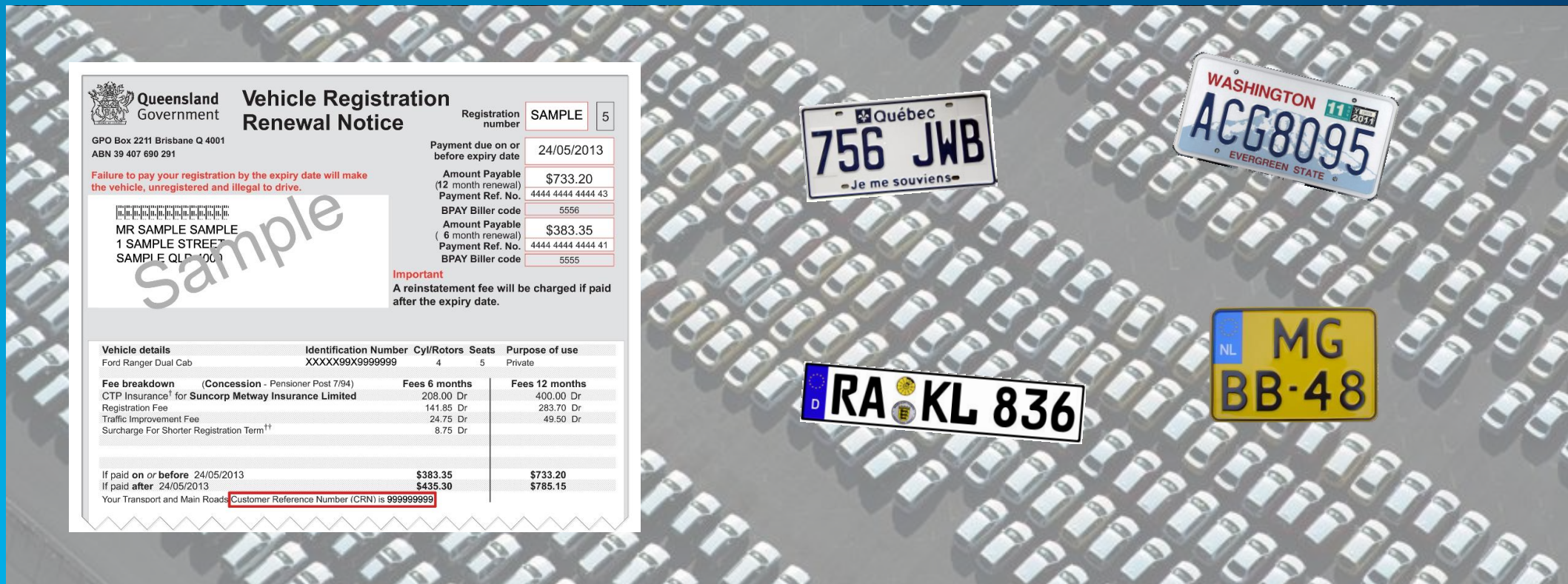
Tanja Linken, Global Director Advisory Services, IHS Markit



# Traditional Metrics in the Automotive Industry

1 Car = 1 Customer = 1 Sales Opportunity

- Every car worldwide is registered in one way or another. In most countries automotive manufacturers have full transparency about their own and their competitors' sales, down to the lowest levels of geography.



**Queensland Government**  
 GPO Box 2211 Brisbane Q 4001  
 ABN 39 407 690 291

**Vehicle Registration Renewal Notice**

Registration number: **SAMPLE** 5

Payment due on or before expiry date: **24/05/2013**

Amount Payable (12 month renewal): **\$733.20**  
 Payment Ref. No. 4444 4444 4444 43

BPAY Biller code: 5556

Amount Payable (6 month renewal): **\$383.35**  
 Payment Ref. No. 4444 4444 4444 41

BPAY Biller code: 5555

**Important**  
 A reinstatement fee will be charged if paid after the expiry date.

Failure to pay your registration by the expiry date will make the vehicle, unregistered and illegal to drive.

MR SAMPLE SAMPLE  
 1 SAMPLE STREET  
 SAMPLE QLD 4001

Vehicle details	Identification Number	Cyl/Rotors	Seats	Purpose of use
Ford Ranger Dual Cab	XXXXX99X9999999	4	5	Private

Fee breakdown	(Concession - Pensioner Post 7/94)	Fees 6 months	Fees 12 months
CTP Insurance <sup>†</sup> for Suncorp Metway Insurance Limited		208.00 Dr	400.00 Dr
Registration Fee		141.85 Dr	283.70 Dr
Traffic Improvement Fee		24.75 Dr	49.50 Dr
Surcharge For Shorter Registration Term <sup>††</sup>		8.75 Dr	
If paid on or before 24/05/2013		\$383.35	\$733.20
If paid after 24/05/2013		\$435.30	\$785.15

Your Transport and Main Roads Customer Reference Number (CRN) is 999999999

Québec  
 756 JWB  
 Je me souviens

WASHINGTON  
 ACG8095  
 EVERGREEN STATE

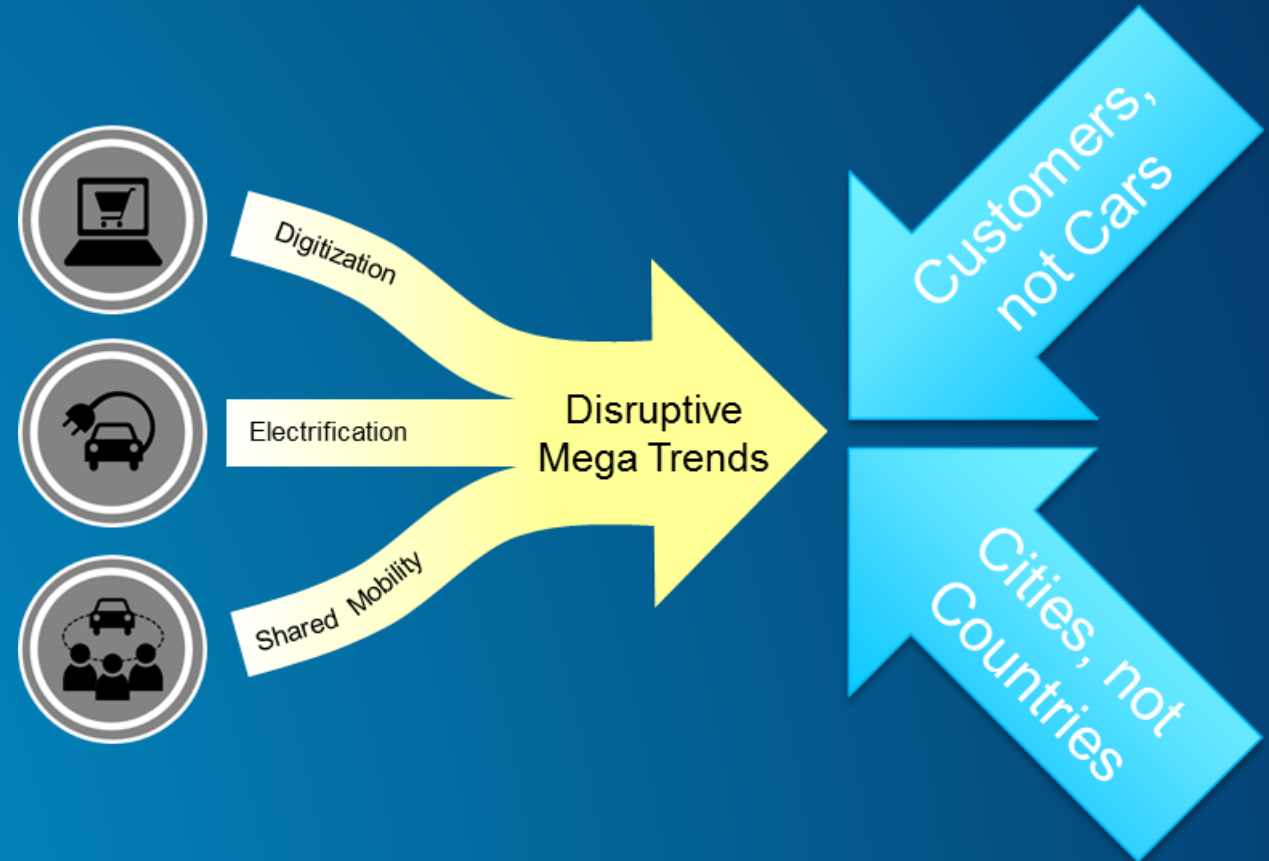
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# Paradigm Change in the Automotive Industry

## The Customer – A New Metric for the Automotive Industry

- The convergence of Mega Trends impacts the way we plan car dealer networks in the future.
- Planning approaches become more customer-centric, hence, we need solid data to understand consumer types and their geographical distribution.





# MB Global Consumer Styles

## A Multidimensional Segmentation Approach

- New segmentation approach defining 10 global Consumer Styles
- Based on a global survey with more than 16 000 respondents
- Globally unified and comparable
- Consumers Styles can be customized for:
  - specific consumer preferences (e.g. preferred car brand)
  - specific behaviors (e.g. use of social media)



### Affluent Highly Educated Urban Families



### Security-oriented Seniors



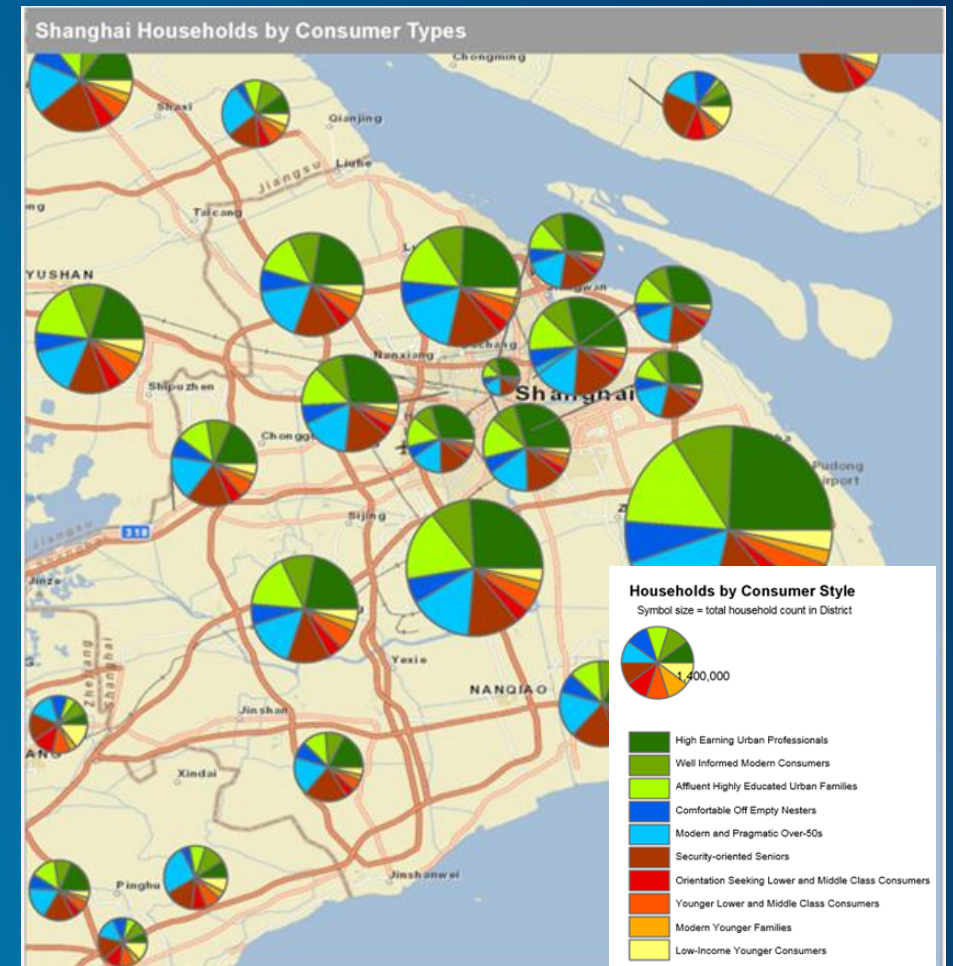
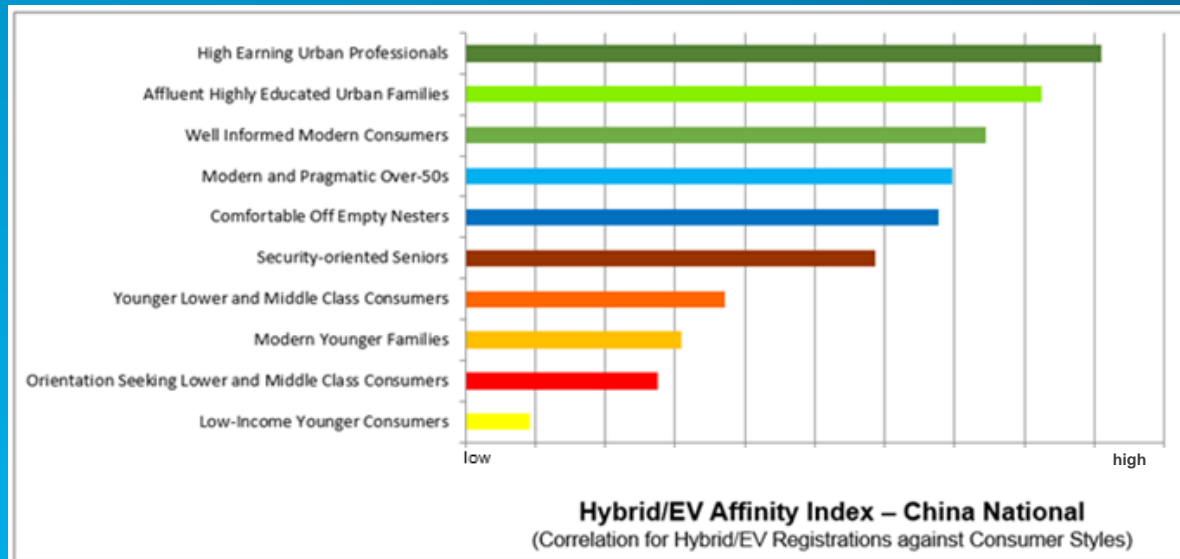
### High-Earning Urban Professionals



# Electrification of Vehicles

Profiling consumers to predict the demand for electric cars

- If we know WHO they are, we also know WHERE they are...
- IHS Markit use MBI Consumer Styles data as one input to forecasting the regional sales potential for electric vehicles

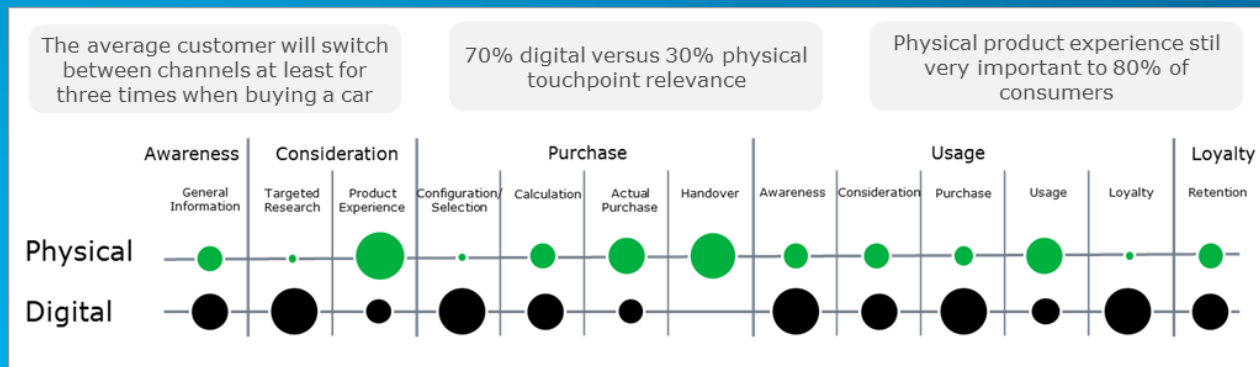




# Digital Customer Touchpoints

Diversified sales channels and dealer formats address consumer preferences

- Online sales become more and more relevant for the automotive industry.
- Like for many other industries before, stationary dealer representation will diminish. But WHERE are the remaining physical customer touchpoints?

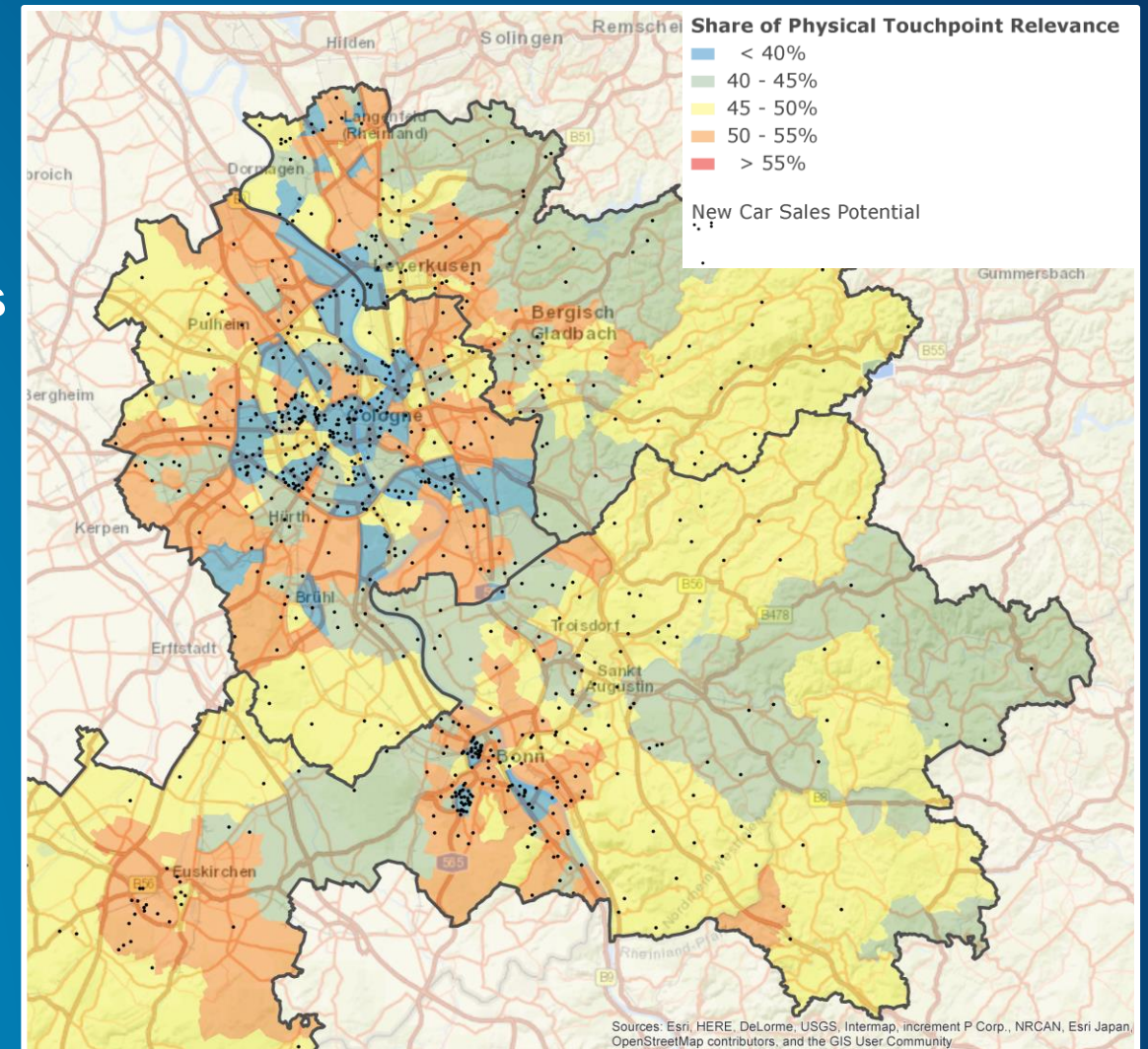
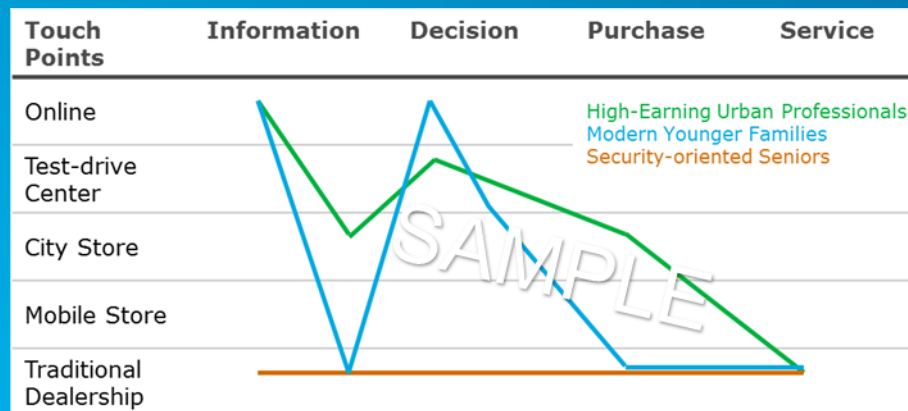




# Digital Customer Touchpoints

Diversified sales channels and dealer formats address consumer preferences

- By defining the customer journey, differentiated by Consumer Types, we can estimate the regional impact of online sales and the potential for various innovative store types, such as city boutique stores or test drive centers.





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