

2017



esri®

THE
SCIENCE
OF
WHERE™

Geo Business Seminar



WELCOME

Paradigm Change in the Automotive Industry

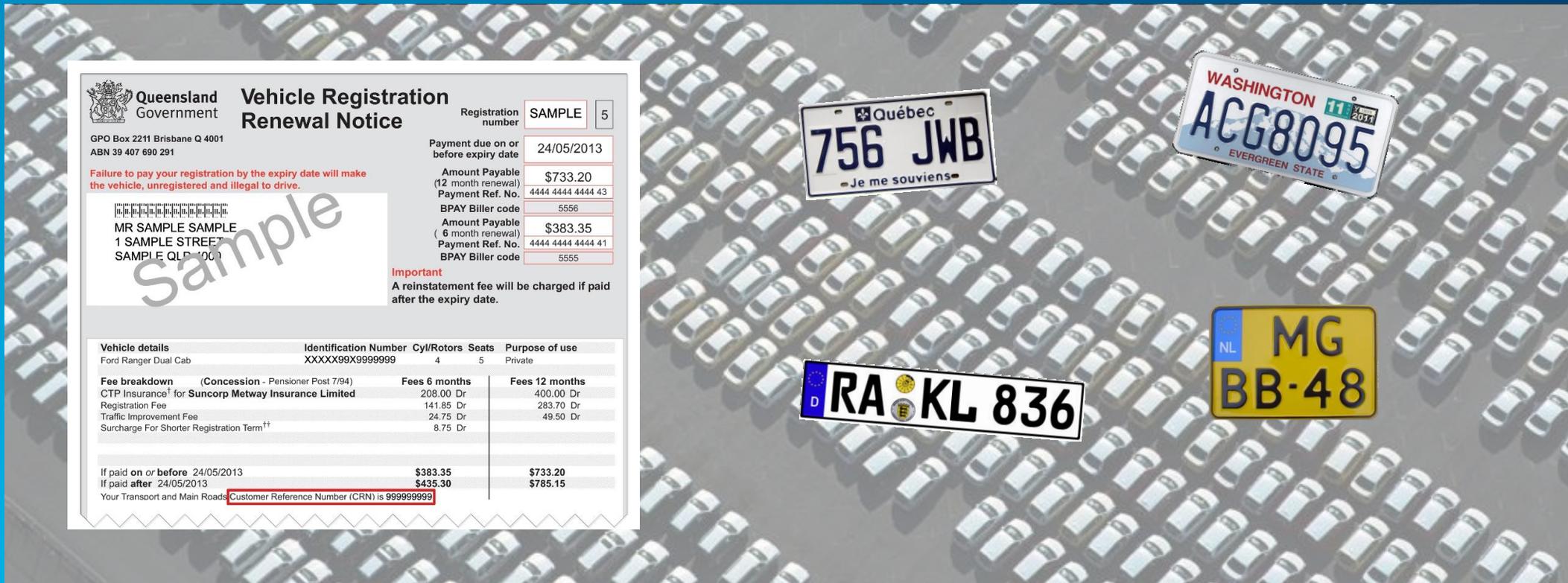
**How spatial data can help us predict the
future of mobility and car sales**

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
 Vehicle Registration Renewal Notice

GPO Box 2211 Brisbane Q 4001
 ABN 39 407 690 291

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

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.

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 ¹ 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 ^{††}	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

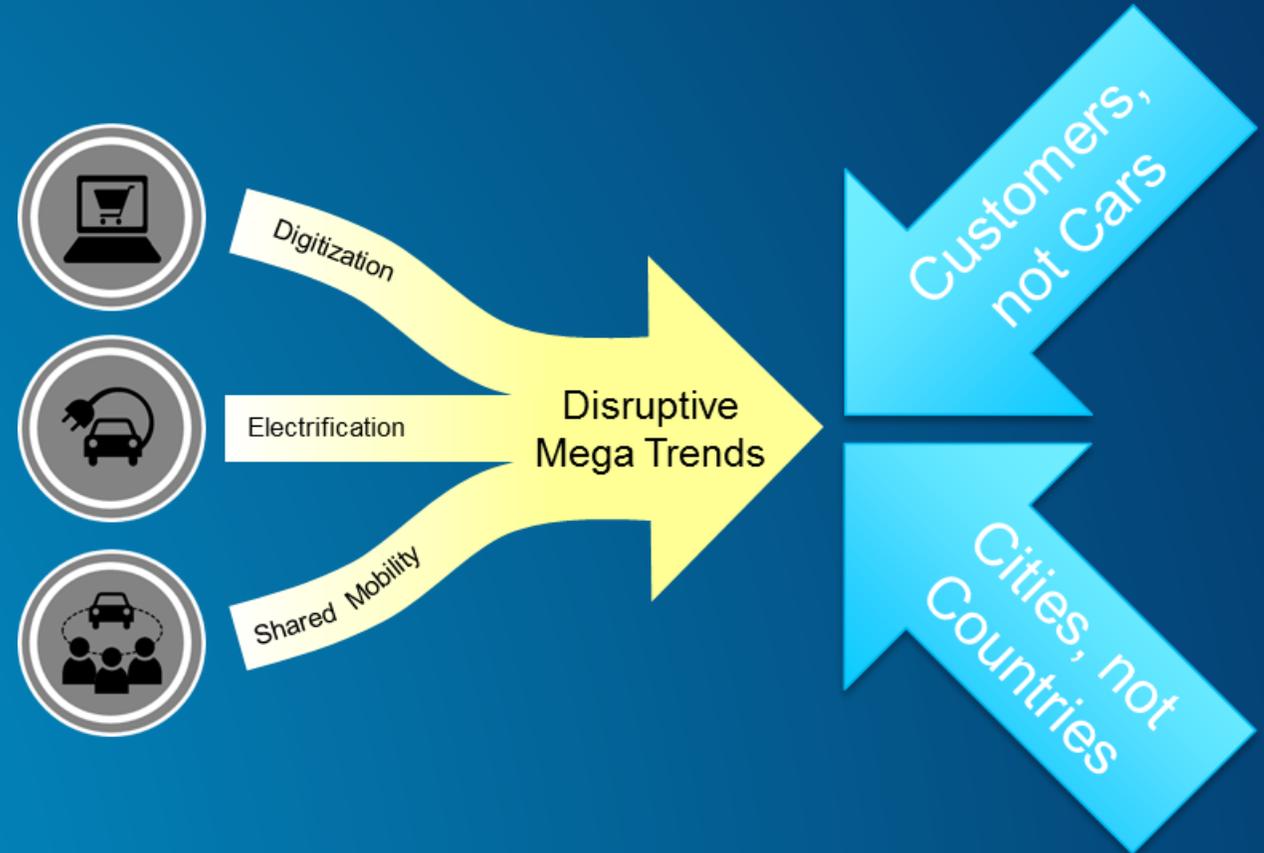
D RA KL 836

NL MG
 BB-48

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



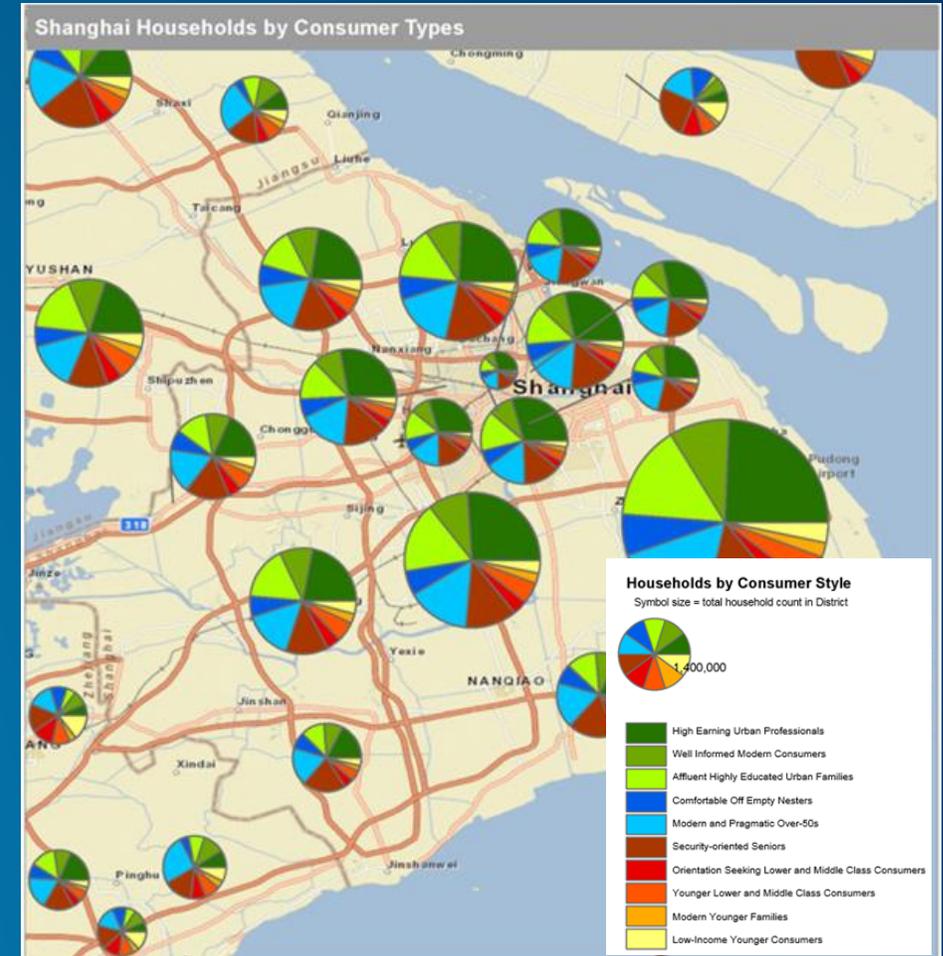
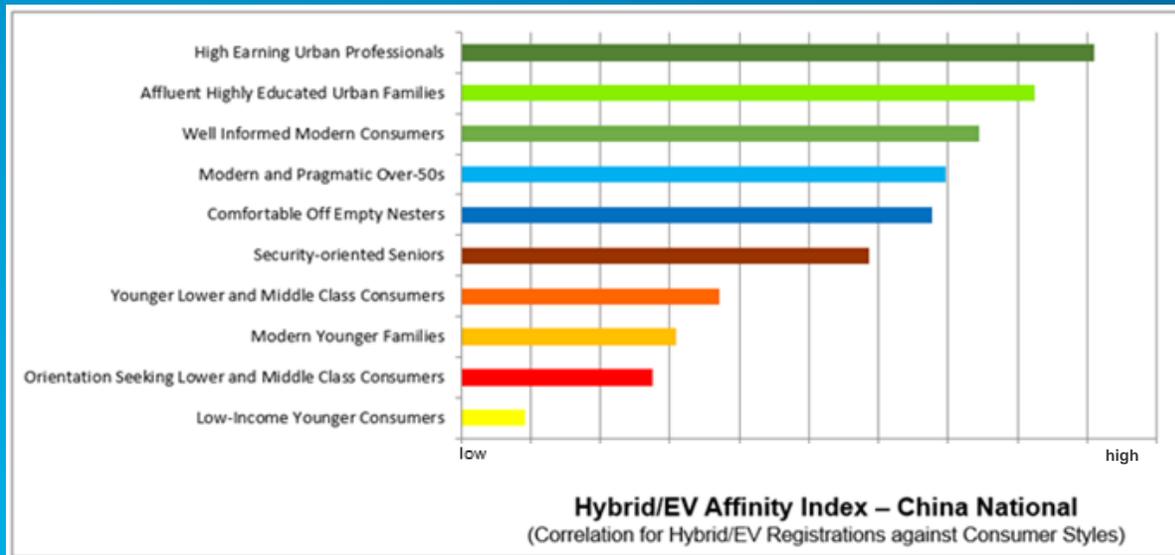
High-Earning Urban Professionals



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

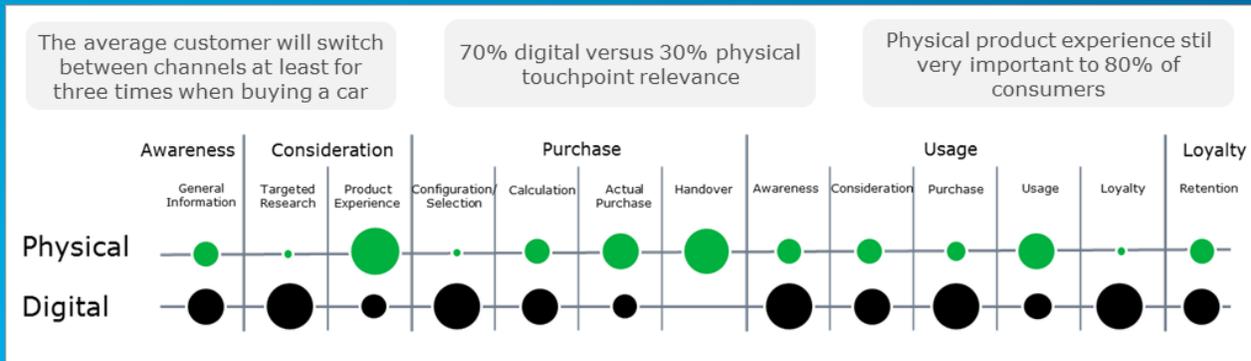


Natural Demand for Electric Vehicles
Sample: MBI Consumer Styles Profiling against IHSMarkit Vehicle Data, displayed on ESRI maps

Digital Customer Touchpoints

Diversified sales channels and dealer formats address consumer preferences

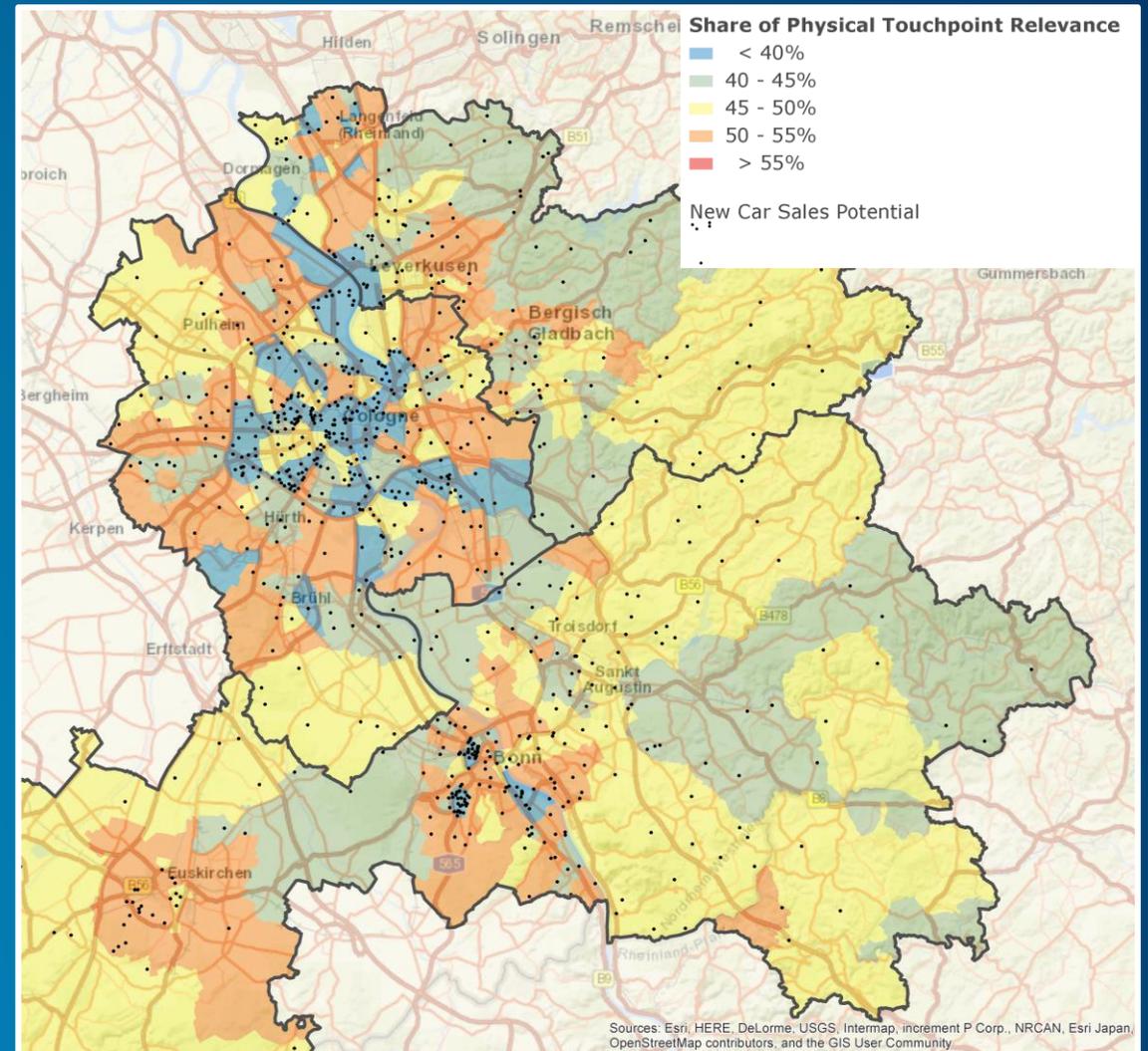
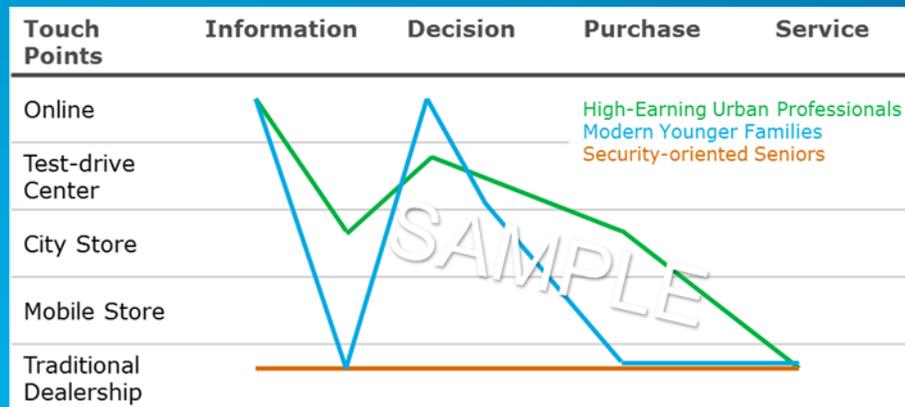
- Online sales become more and more relevant for the automotive industry.
- Like for many other industries before, stationary dealer representation will diminish. But WHERE are the remaining physical customer touchpoints?



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.





Disclaimer

The information contained in this presentation is confidential. Any unauthorised use, disclosure, reproduction or dissemination, in full or in part, in any media or by any means, without the prior written permission of IHS Markit Ltd. or any of its affiliates ("IHS Markit") is strictly prohibited.

Opinions, statements, estimates and projections in this presentation (including other media) are solely those of the individual author(s) at the time of writing and do not necessarily reflect the opinions of IHS Markit. Neither IHS Markit nor the author(s) has any obligation to update this presentation in the event that any content, opinion, statement, estimate or projection (collectively, "information") changes or subsequently becomes inaccurate.

IHS Markit makes no warranty, expressed or implied, as to the accuracy, completeness or timeliness of any information in this presentation, and shall not in any way be liable to any recipient for any inaccuracies or omissions. Without limiting the foregoing, IHS Markit shall have no liability whatsoever to any recipient, whether in contract, in tort (including negligence), under warranty, under statute or otherwise, in respect of any loss or damage suffered by any recipient as a result of or in connection with any information provided, or any course of action determined, by it or any third party, whether or not based on any information provided.

The inclusion of a link to an external website by IHS Markit should not be understood to be an endorsement of that website or the site's owners (or their products/services). IHS Markit is not responsible for either the content or output of external websites.

Copyright ©2017, IHS Markit. All rights reserved and all intellectual property rights are retained by IHS Markit.



esri

THE
SCIENCE
OF
WHERE