Arthur D Little

Automobilhandel der Zukunft
Trends, Herausforderungen, Lösungen

AUTOHAUS BRANCHENKOMPASS

TRENDS UND VISIONEN FÜR DAS AUTOMOBILJAHR 2016

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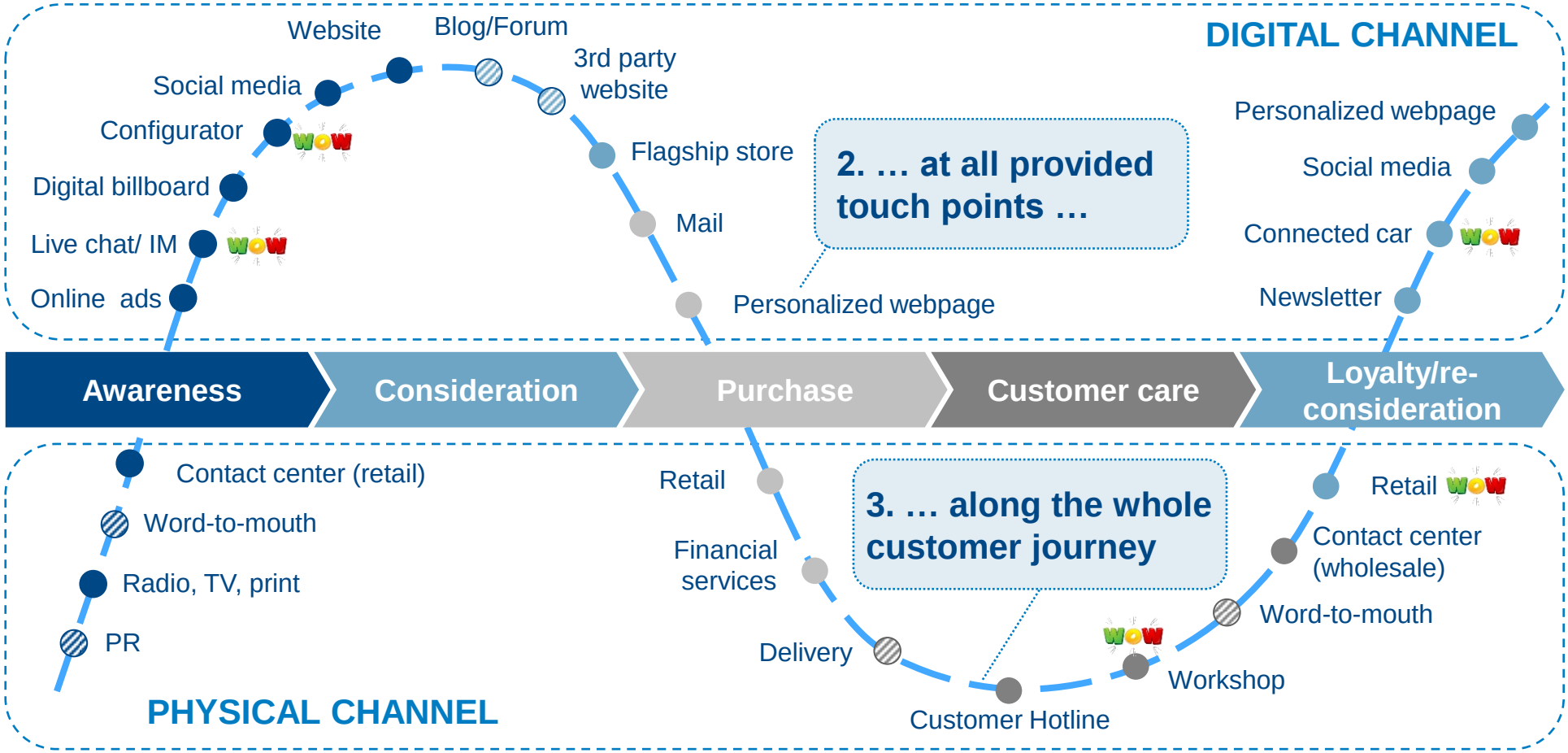
Multikanal und Online Sales sind aktuelle Trends. Was kommt noch auf uns zu?



Manageable touch point | Indirect/ non-manageable touch point | Moment of truth (examples)

Source: Arthur D. Little

Globale und Industrie-übergreifende Trends erzeugen einen hohen Innovations- und Wettbewerbsdruck

Quelle: Arthur D. Little

Die Automobilindustrie ist in besonderem Maße von den generellen sowie spezifischen Trends betroffen

Customer Demand

- **New mobility types** in triad markets
- **More services and mobility solutions** than status symbol car
- Increasing importance of BRIC customer requirements

Technology Shifts

- **Low emission power train technologies**
- **e-vehicle**
- Intelligent transport systems (M2M-communication, driver assistance, …)

Mobility Market 2020

- Market volume and segments?
- Business models?
- Market offering for e-vehicles?
- Impact on OEMs, suppliers, mobility providers, new entrants?

Competitive Landscape

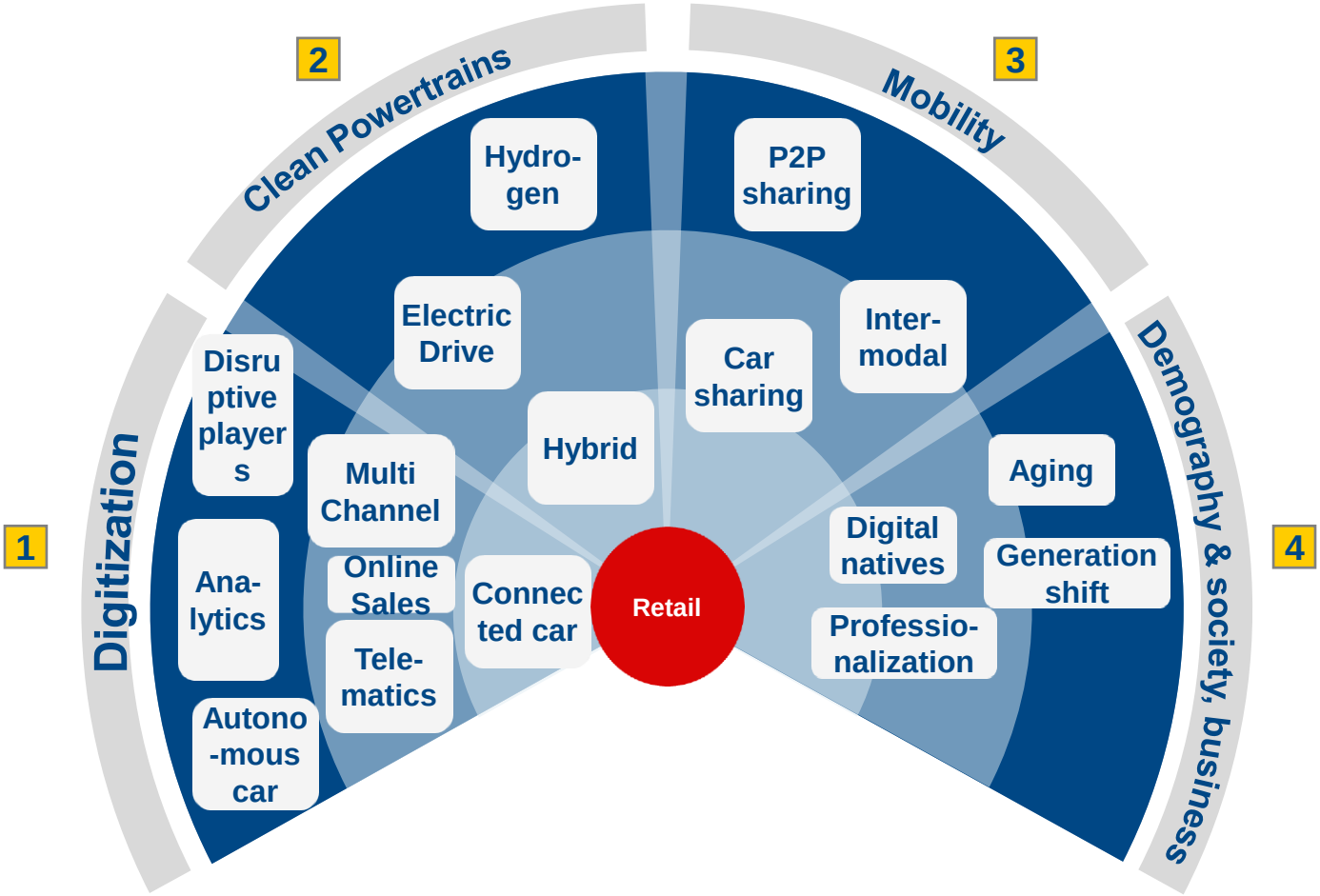
- **New competitors from BRIC markets**
- New entrants in mobility market (Utility companies, better place, …)
- Consolidation (OEM, supplier)

Political Environment

- **Stricter emission standards**
- **City toll and local regulations**
- Public-private partnership mobility solutions and government subsidies

Quelle: Arthur D. Little

Der Trendradar für den Autohandel zeigt Potential für große Herausforderungen



Quelle: Arthur D. Little

Die Herausforderungen für den Autohandel sind massiv

Sales

- Neue Kundentypen
- Mobilität statt Kaufen
- Multi-Channel
- Best Customer Experience
- Weitere Professionalisierung (z.B. Sales Funnel)
- Disruptoren

After Sales

- Kaum noch Unfälle (aber dann höherer Schaden?)
- Rückgang Service- und Teilegeschäft wegen Elektrifizierung
- Telediagnose und –Reperatur (Flashen over the Air)
- Diagnose und Fehlerbehebung komplexer digitaler Produkte

Heraus-forerungen Auto-handel

Übergreifend

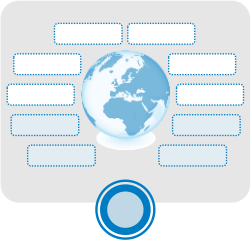
- Generationenwechsel (Inhaber)
- Neue OEMs (ala Tesla, Google und Chinesen)
- Connected Cars und Customer (z.B. Mercedes me)
- First tier supplier (z.B. Bosch) als Wettbewerber für das Netzwerk

Quelle: Arthur D. Little

3 Fähigkeit zur Lösungsfindung

Der Autohandel steht vor hohem Innovationsdruck – Drei Fähigkeiten werden benötigt

1. Anticipate!



UNDERSTAND
future trends and changes in ecosystems

2. Innovate!

BUILD
innovation capabilities, creative solutions & business models

3. Transform!

SHAPE
ecosystems and your company continuously

Quelle: Arthur D. Little

Die möglichen Lösungsansätze implizieren eine große Veränderung

Auswahl

Lösungsansätze

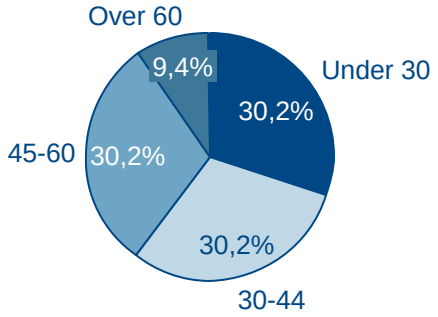
1. Service für Mobilitätsgeschäft der OEMs (Car2Go, DriveNow, …)
2. Aufbau Kompetenzen zum Umgang mit Digital Natives und komplexen „digitalen“ Kunden-Fahrzeugschnittstellen
3. Weitere Professionalisierung Sales und After Sales
4. Neue Formate in Sales und After Sales (Flash und mobil)
5. Aufbau Kompetenzen für elektrifizierte Fahrzeuge
6. Neue kundenzentrierte Geschäftsmodelle und -prozesse

Quelle: Arthur D. Little

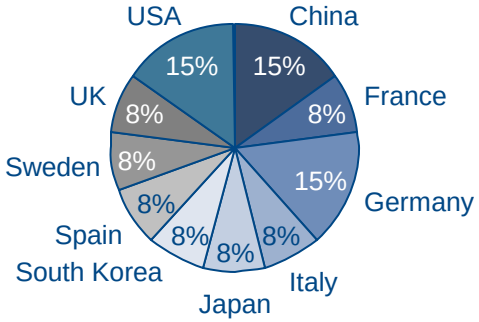
Auf den Kunden kommt es an – Die Arthur D. Little globale Auto-Studie hat Kundensichten auf Mobilität, Elektrofahrzeuge und autonome Fahrzeuge untersucht

Customer survey demographics

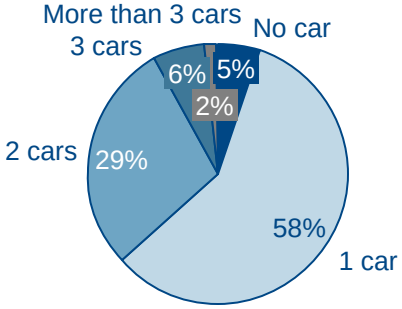
Age Group



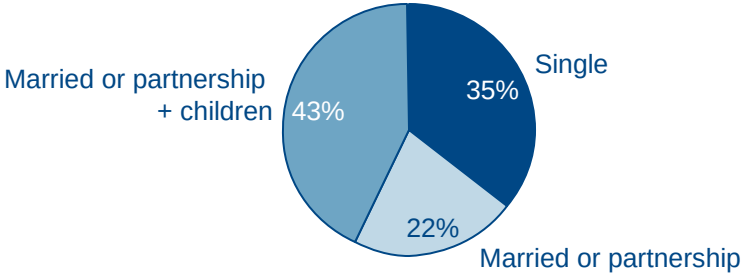
Geographic Location



Cars in the Household



Marital Status

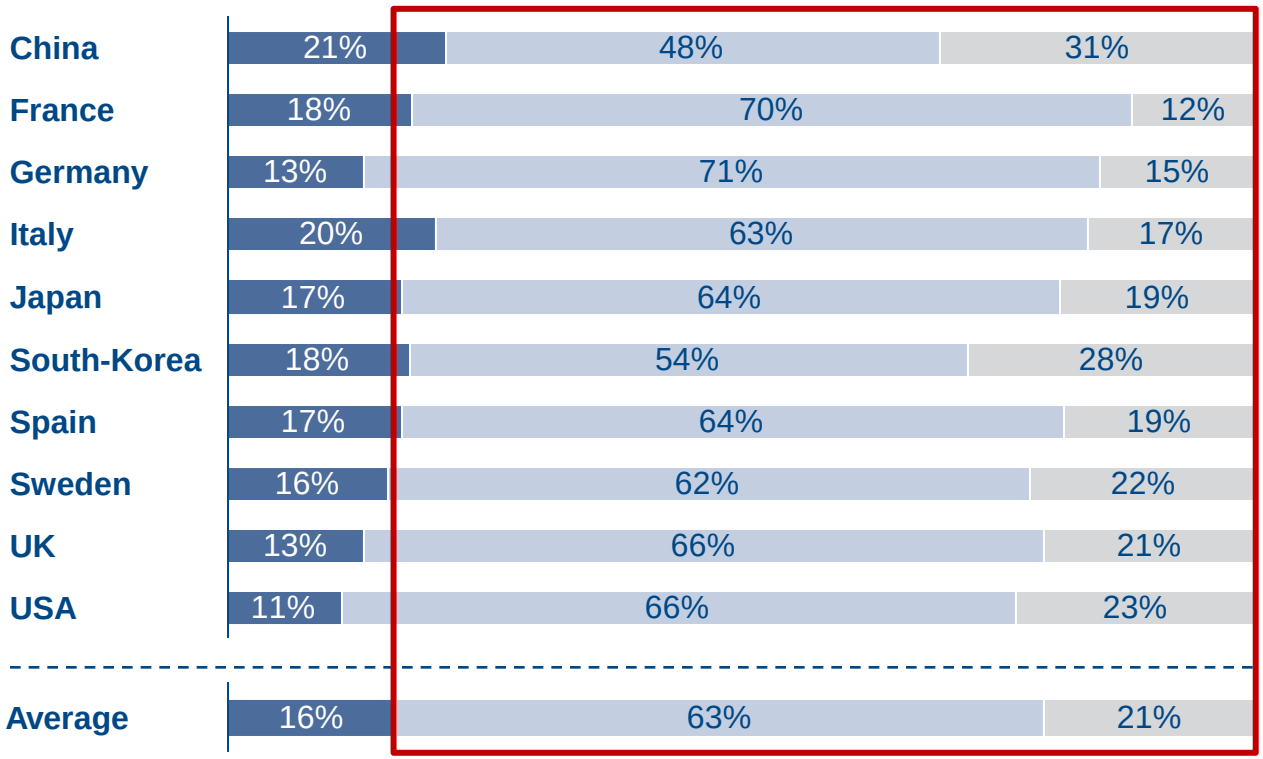


Quelle: Arthur D. Little

Ist es wahr, dass der Besitz von Autos immer unattraktiver wird? Nein!

Importance of owning a car in 10 years

Question: Do you expect that in 10 years owning a car will be as important as it is today?



Quelle: Arthur D. Little

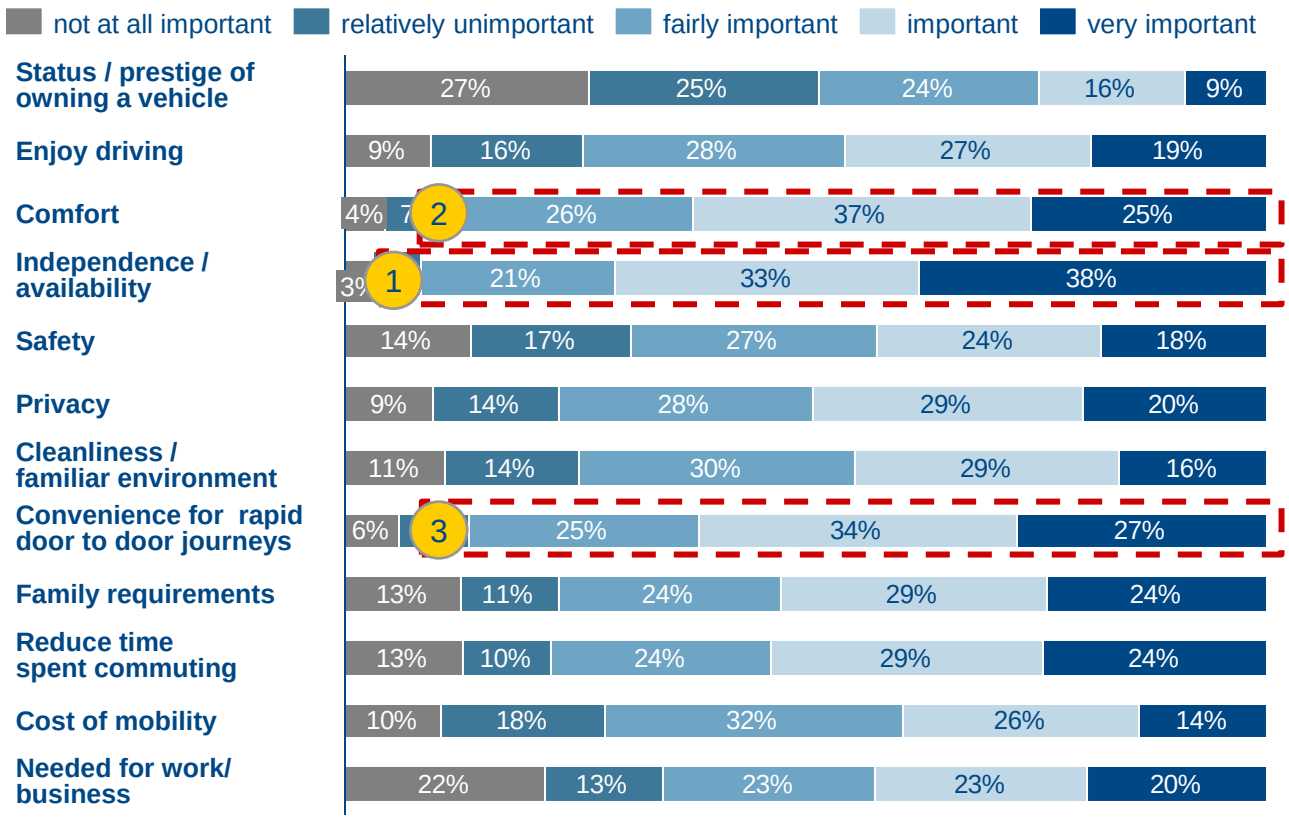
Remarks

- Only a minority of drivers consider owning a car will be less important in the future
- Key reasons: independence, availability, safety, status & prestige, etc.

Unabhängigkeit, Komfort und Annehmlichkeit sind Hauptgründe für den Autobesitz

Key reasons to own a car

Question: Indicate the reasons why it is personally important for you to own a vehicle



Source: Arthur D. Little

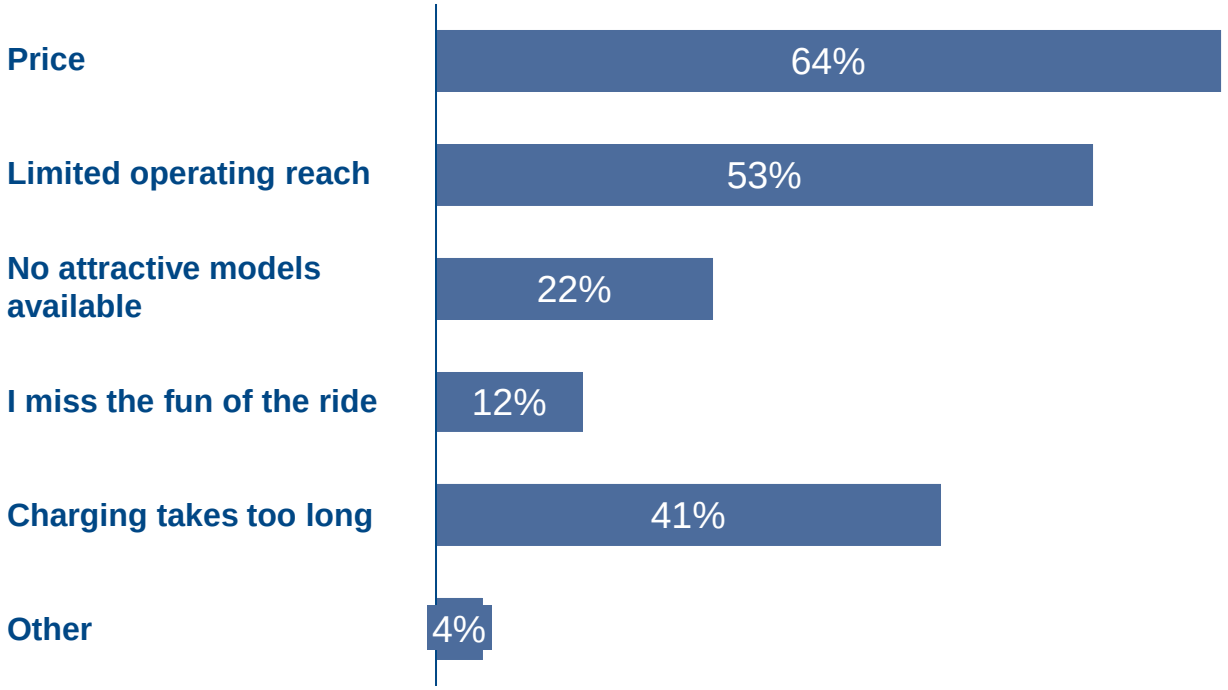
Remarks

- Around 90 percent of end customers consider independence, comfort and convenience to be important drivers to them to further own a vehicle
- Car sharing services business models do not yet address the key customer requirements to fully use these services

E-Fahrzeuge sind nach heutigem Stand nicht allzu attraktiv für Kunden

Barriers for purchasing electric cars

Question: What are the factors that discourage you from purchasing an electric car?



Source: Arthur D. Little

Remarks

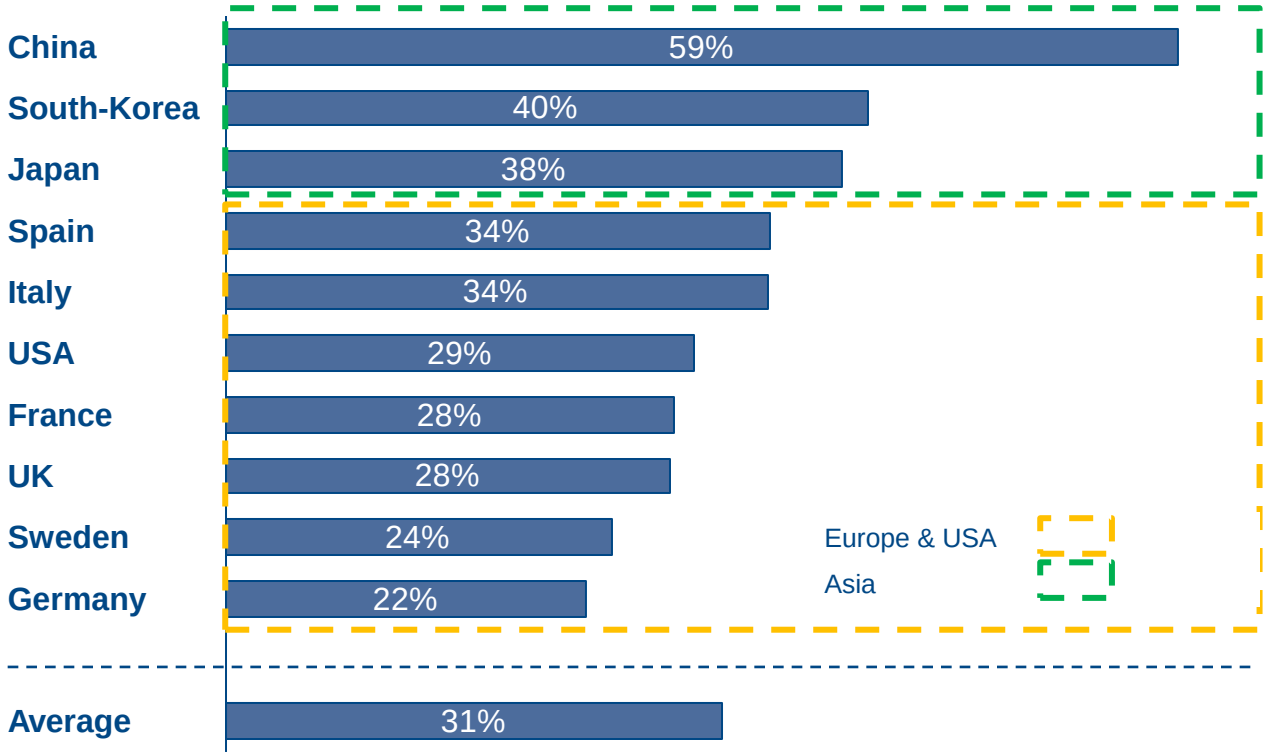
- Price, limited operating reach and charging are the key reasons for customers not to purchase electric vehicles
- Globally, respondents show varying importance of particular requirements – but they are the same everywhere

Gerade in Europa herrscht noch eine große Skepsis zu autonomen Fahrzeugen

Acceptance: fully autonomous cars

Question: Would you use cars that were fully autonomous?

Answered with "yes" (other answer alternatives: maybe, no)



Source: Arthur D. Little

Remarks

- Between 20 and 60 percent of current car users clearly accept autonomous driving
- China by far has the largest acceptance of autonomous cars, followed by South-Korea and Japan
- European and US-customers are still hesitant towards fully autonomous cars

Arthur D. Little has been at the forefront of innovation since 1886. We are an acknowledged thought leader in linking strategy, innovation and transformation in technology-intensive and converging industries. We navigate our clients through changing business ecosystems to uncover new growth opportunities. We enable our clients in building innovation capabilities and transforming their organization.

Our consultants have strong practical industry experience combined with excellent knowledge of key trends and dynamics. Arthur D. Little is present in the most important business centers around the world. We are proud to serve most of the Fortune 1000 companies, in addition to other leading firms and public sector organizations.

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