



# ● Automotive Covid impact

Mike Jones, Chairman ASE plc

Driving profitability in the global automotive industry since 1975

- Brief review of 2019 and Q1 2020
- Covid scenario planning
  - Plan A – continued lockdown easing
  - National 2<sup>nd</sup> wave
  - Localised outbreak
  - Vaccine introduction

## ● Who Are ASE?



For more than 40 years we have helped the world's biggest and best known global automotive brands use data to be more efficient, more profitable automotive businesses.



Assurance & Mitigations



Performance Improvement



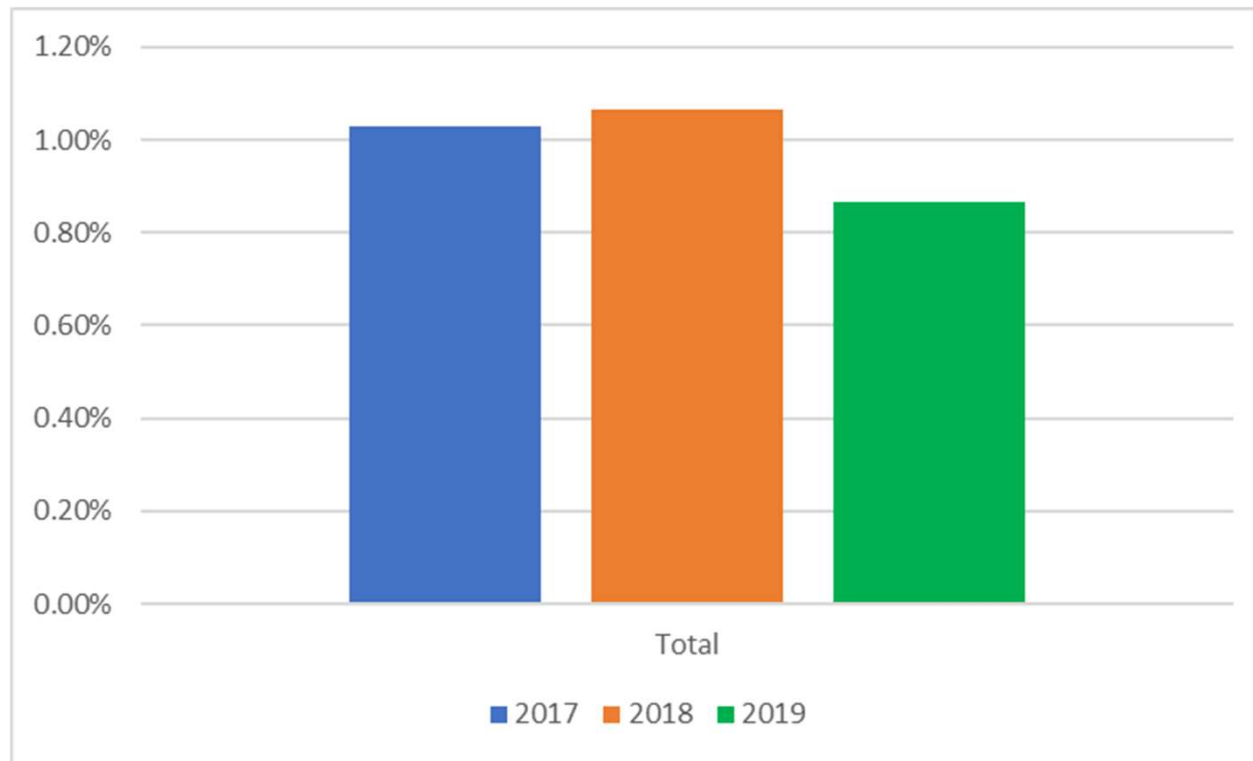
Global Data Services

# ● Where we are...

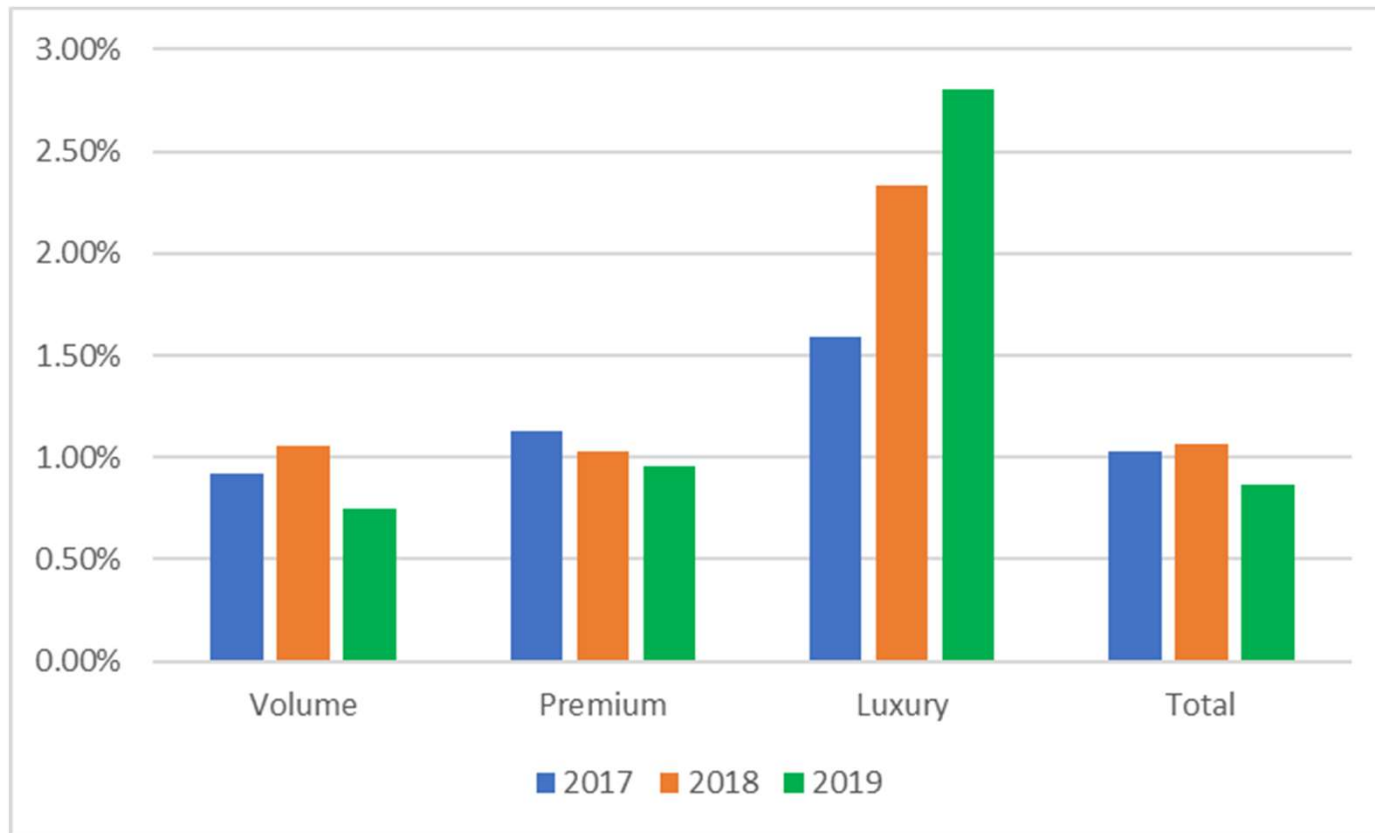


- Africa
- Asia Pacific
- Europe
- Latin America
- Middle East
- North America
- Australia

## ● So how did motor retail fair?



# ● So how did motor retail fair?



● 2020



- Q1 – on for record profit
- Q2 – lockdown
- June – record used car results (despite stock shortages)

## ● Scenario planning – Plan A



- Continued steady release of the lockdown
- Phasing out of government support
- Significant recession/unemployment in Q3/Q4
- Government infrastructure programme
- Aggressive franchise targets

## ● Scenario planning – National 2<sup>nd</sup> wave



- National lockdown reimposed
- Return to the scenario from April
- National government support
- Further accumulation of retailer (and government) debt

## ● Scenario planning – Localised outbreaks



- The most likely scenario
- Beijing, North Rhine-Westphalia, Leicester?
- Government support?

## ● Scenario planning – vaccine



- Steady return to pre-Covid life
- But .....
- Customers have changed – permanently
- Industry change has accelerated
- Network change a key focus

Any questions ??

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Thank you  
for your time

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