

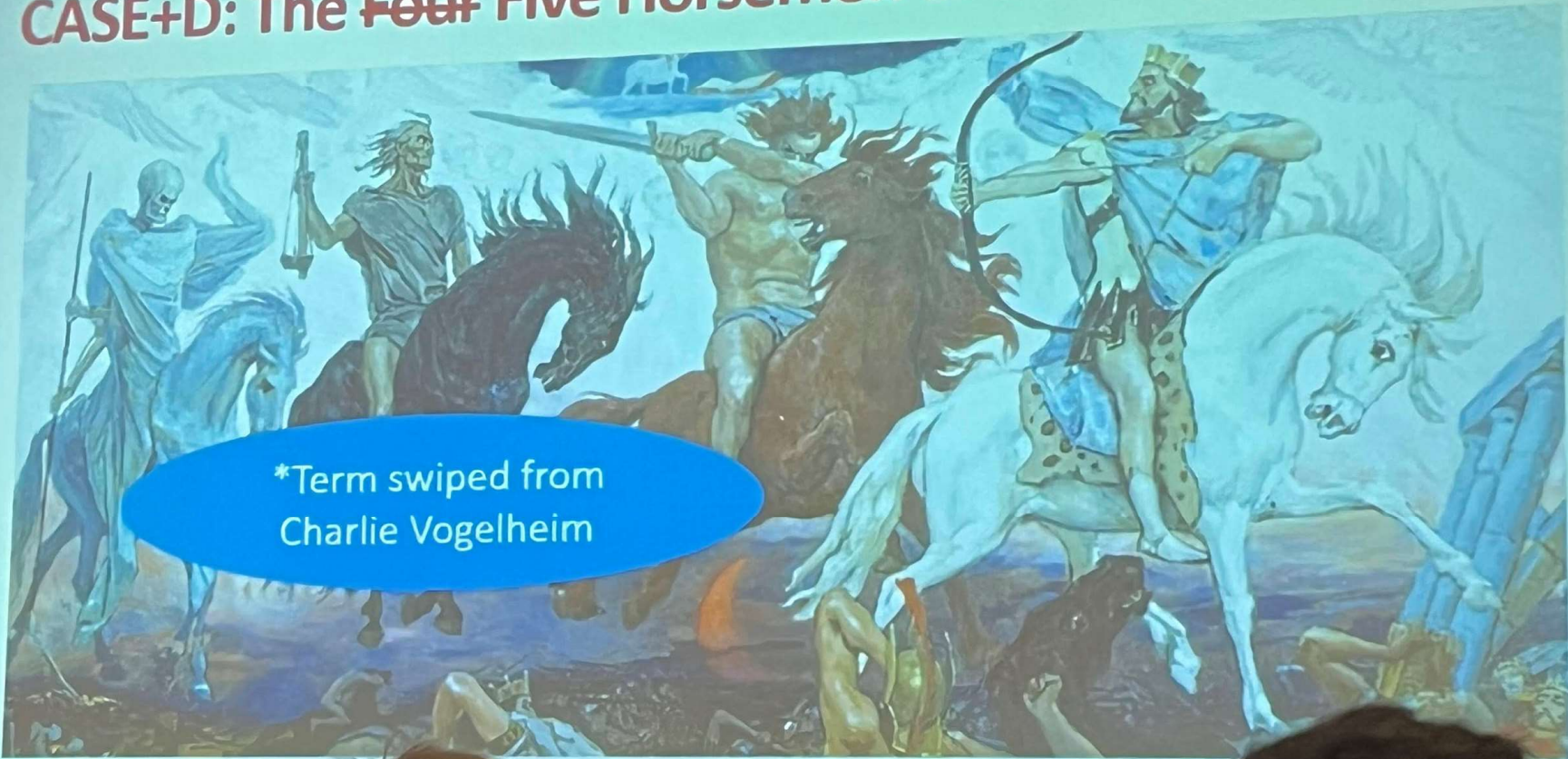
An aerial photograph of a winding asphalt road that snakes through a rugged, mountainous landscape. The terrain is dark and rocky, with patches of sparse, yellowish-brown vegetation. The road curves in several sharp turns, creating a complex, S-shaped path. A small car is visible on the road in the upper right section. The entire scene is framed by a thin, light-colored border.

Motor Retailer

View of 2024

John O'Hanlon

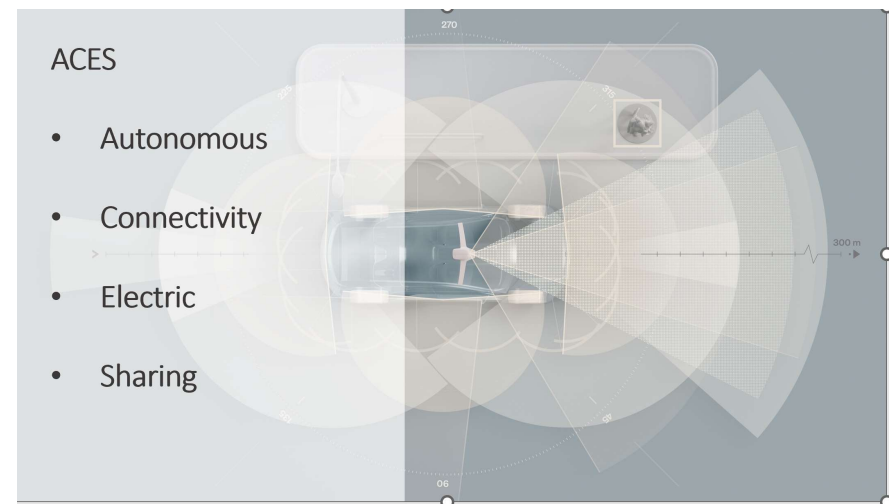
CASE+D: The ~~Four~~ Five Horsemen of the Carpocalypse*



*Term swiped from
Charlie Vogelheim

“5 Horsemen”ACES plus Agency

- Autonomous Vehicles
 - Connected Car
 - Electric
 - Shared Services
- and
- Distribution Channels

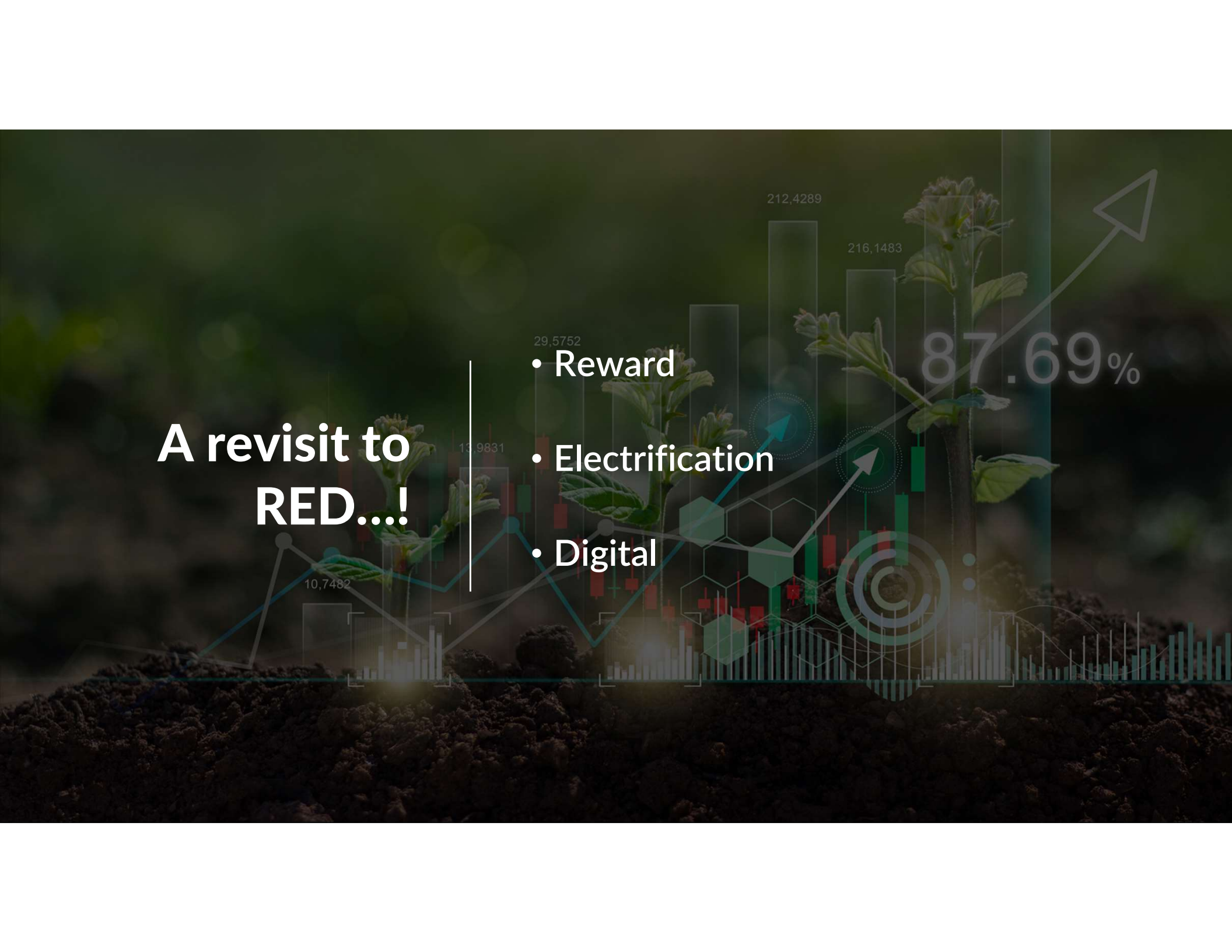


(Glenn Mercer NADA)

A revisit to RED...!

- Reward
- Electrification
- Digital

87.69%



+ Economy!

- Inflation
- Debt
- Confidence

87.69%



Reward...





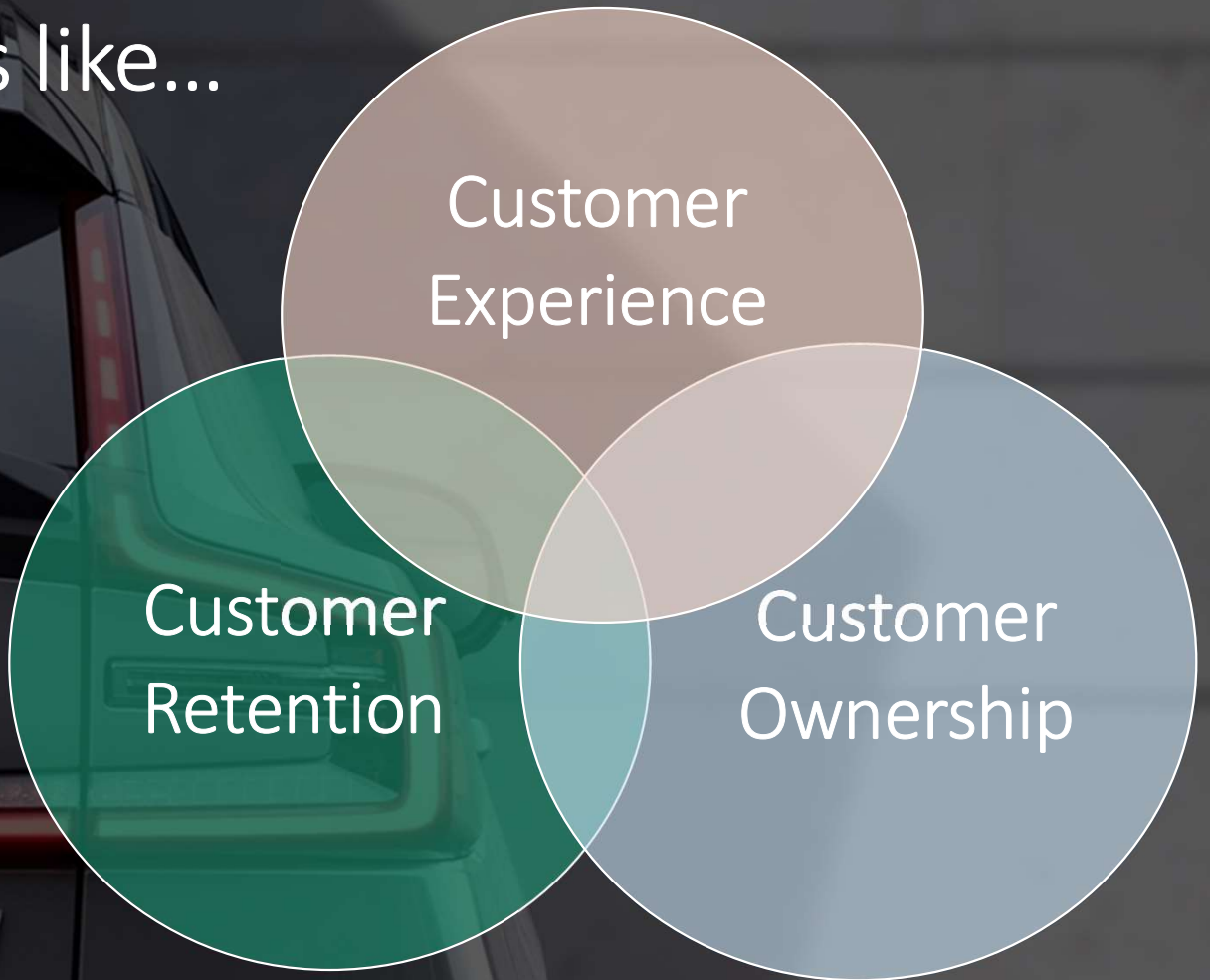
Agency Reward

- Wholesale stronger level of return for some dealers
- No inflationary creep for increasing unit list prices
- Volume only mechanism for offset in operating costs
- Opportunity for additional sales remains imperative to the process

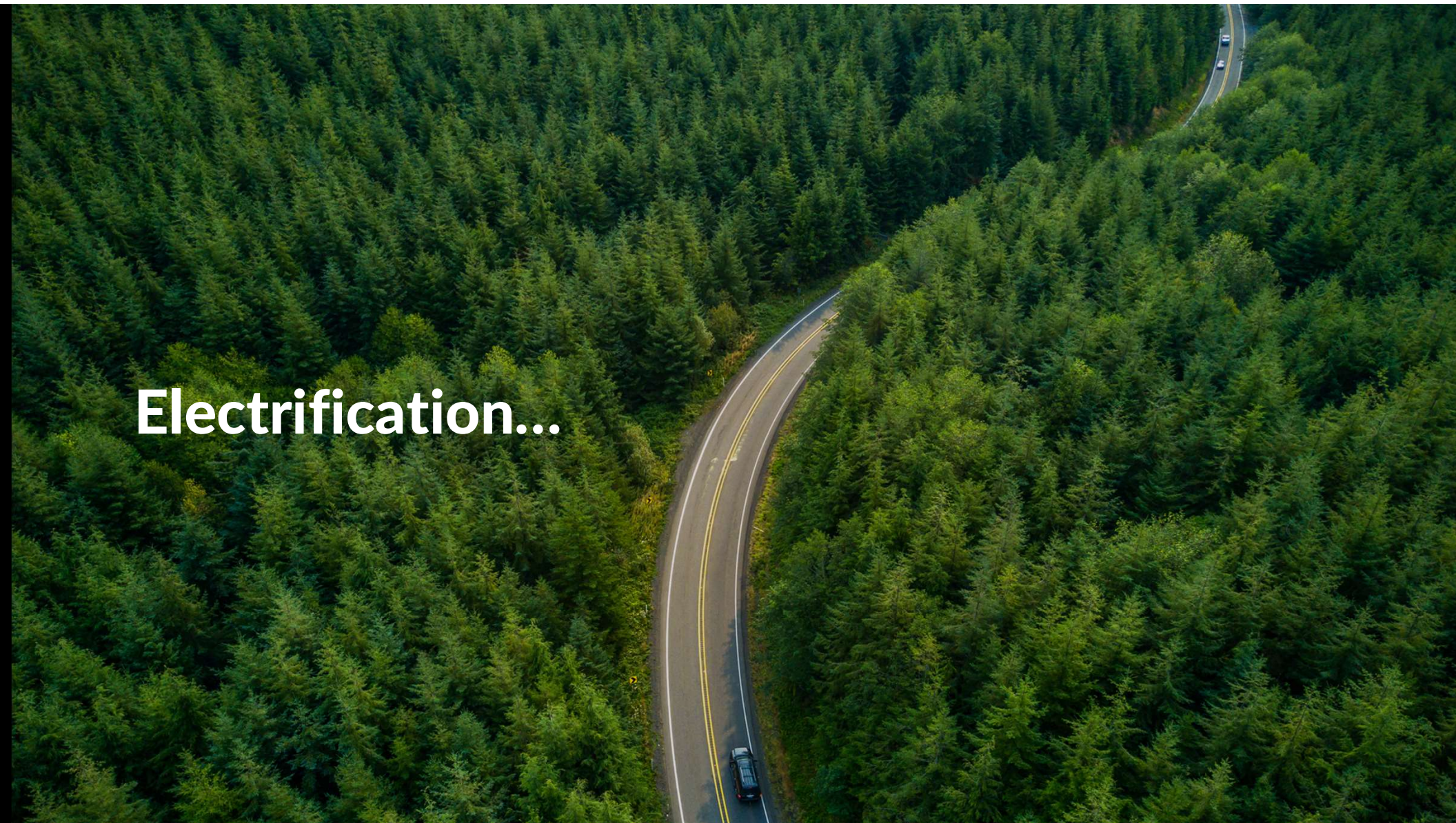
What good looks like...

OEM role:

- Systems
- Incentives
- Volume



Electrification...

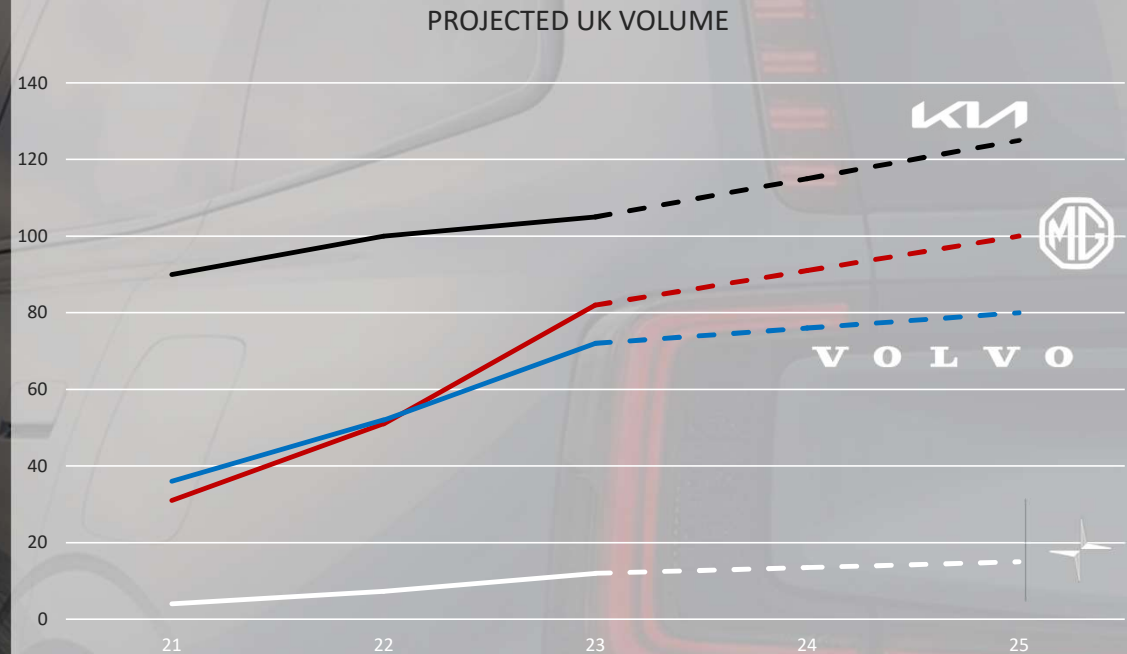


V O L V O

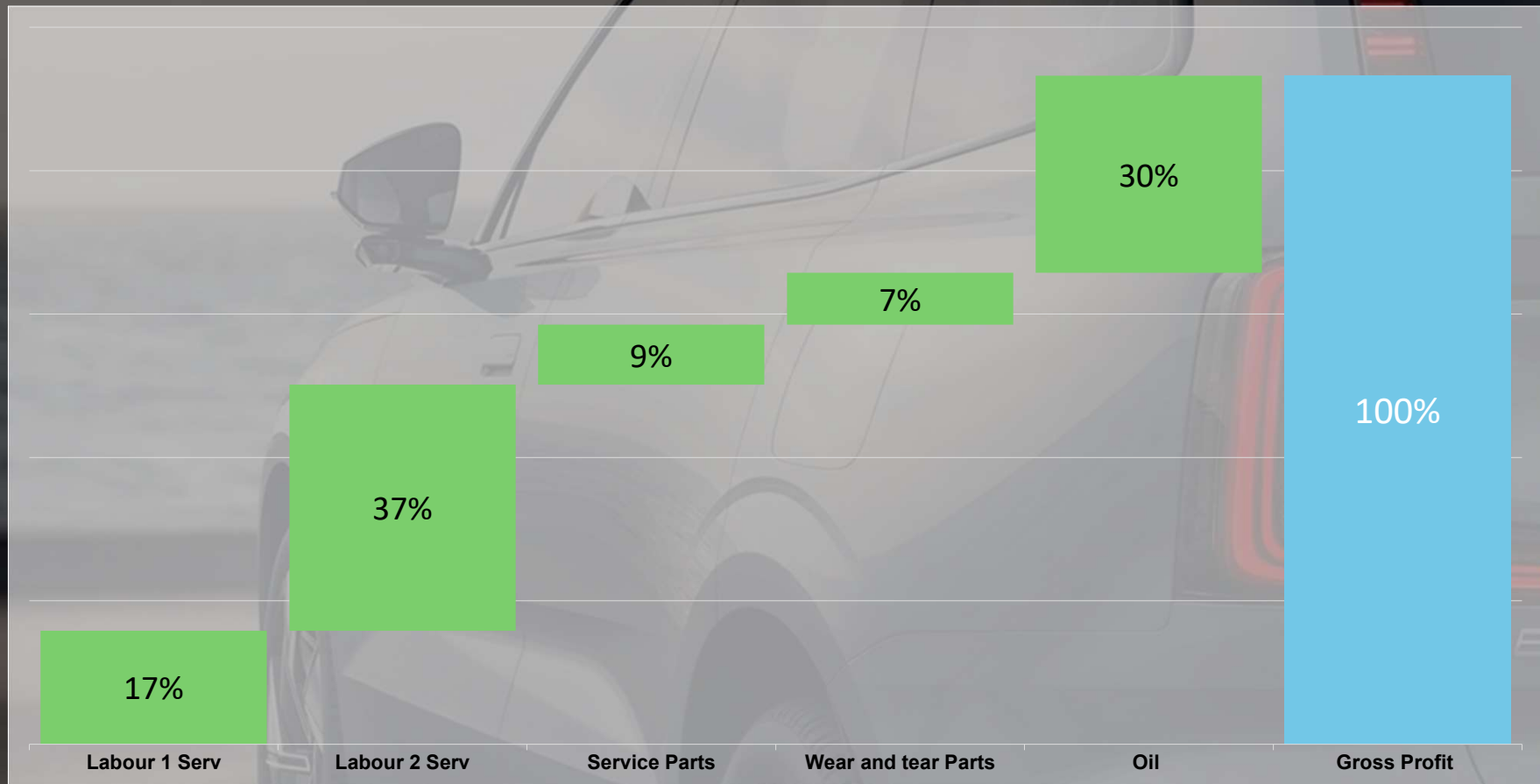


Brand Selection

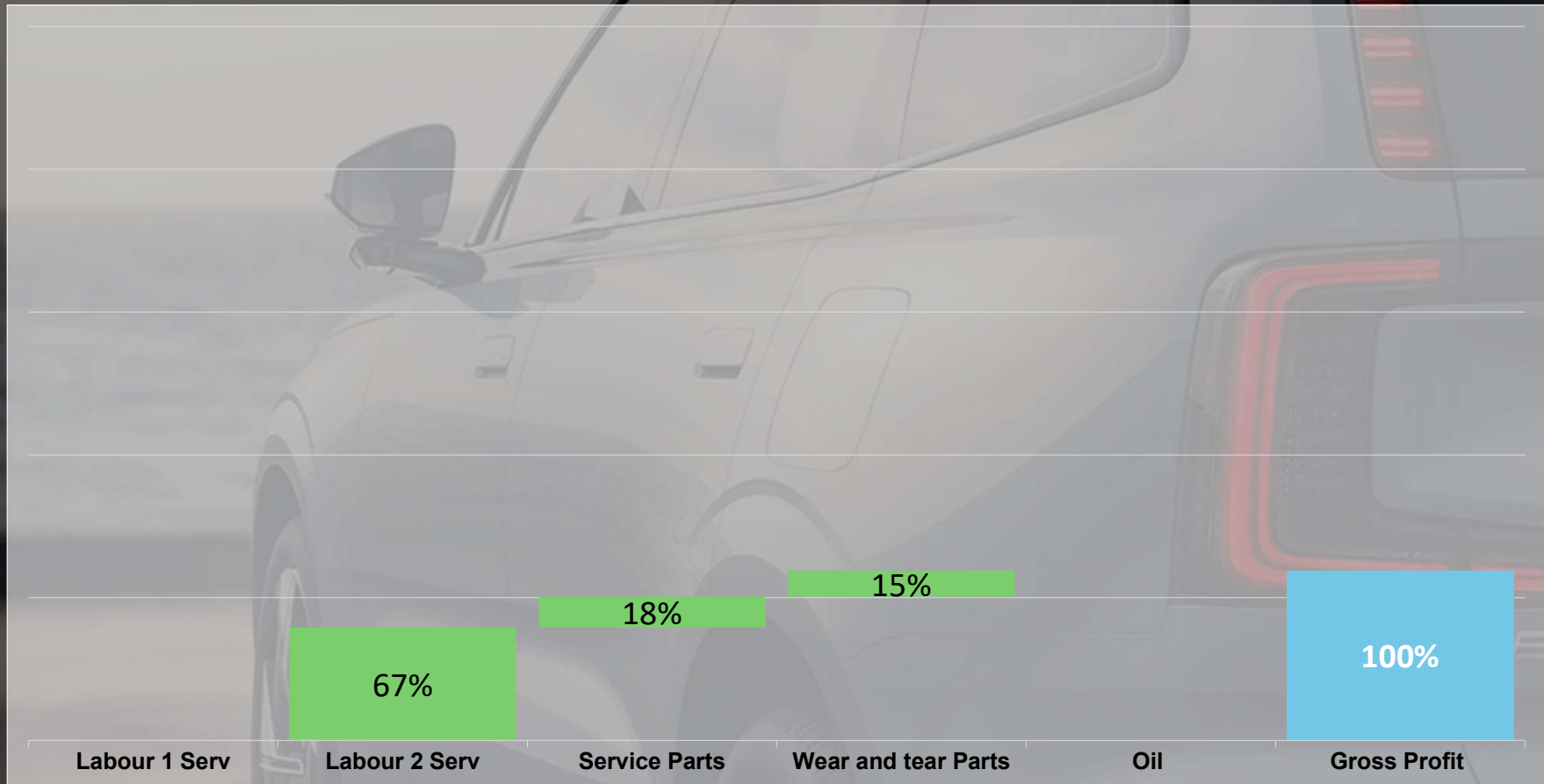
- **Kia** – Established Volume
- **MG** – Volume new entrant
- **Volvo** – Premium
- **Polestar** – Sport Premium



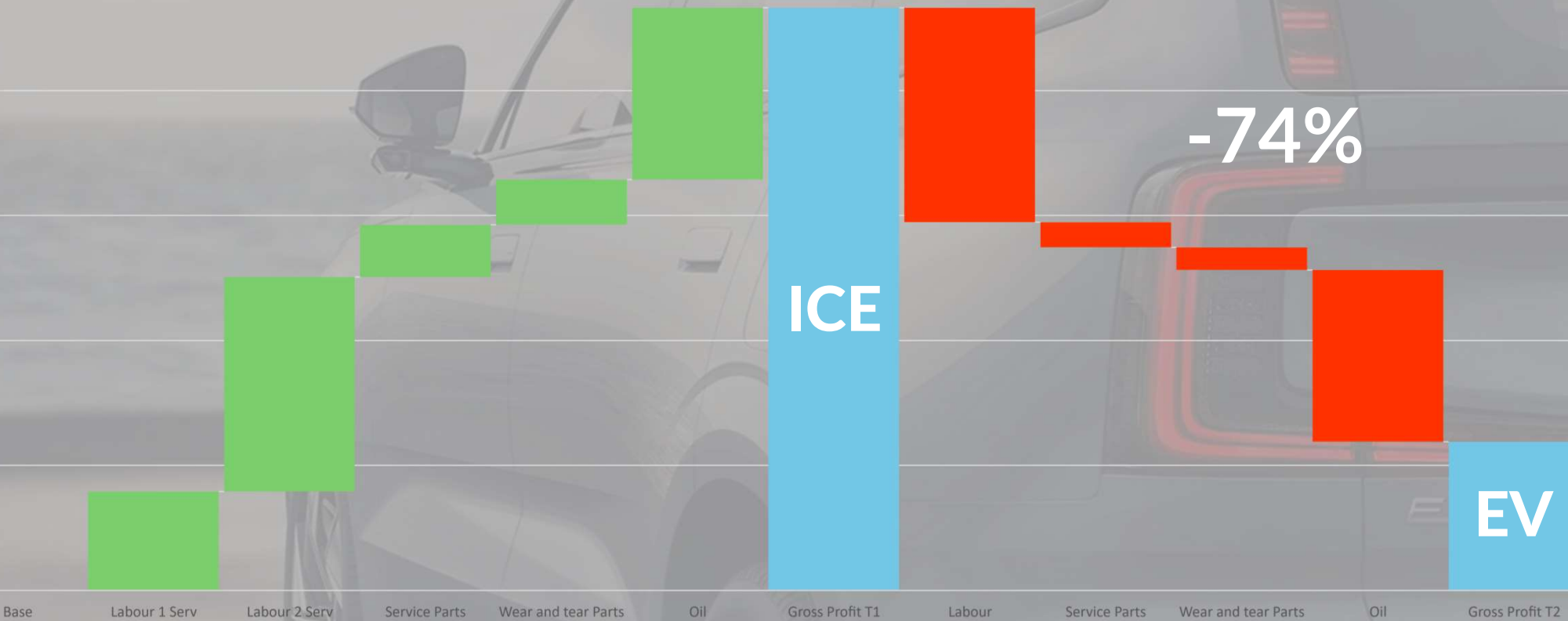
Aftersales GP construction



A Full EV market



A full EV impact



Aftersales



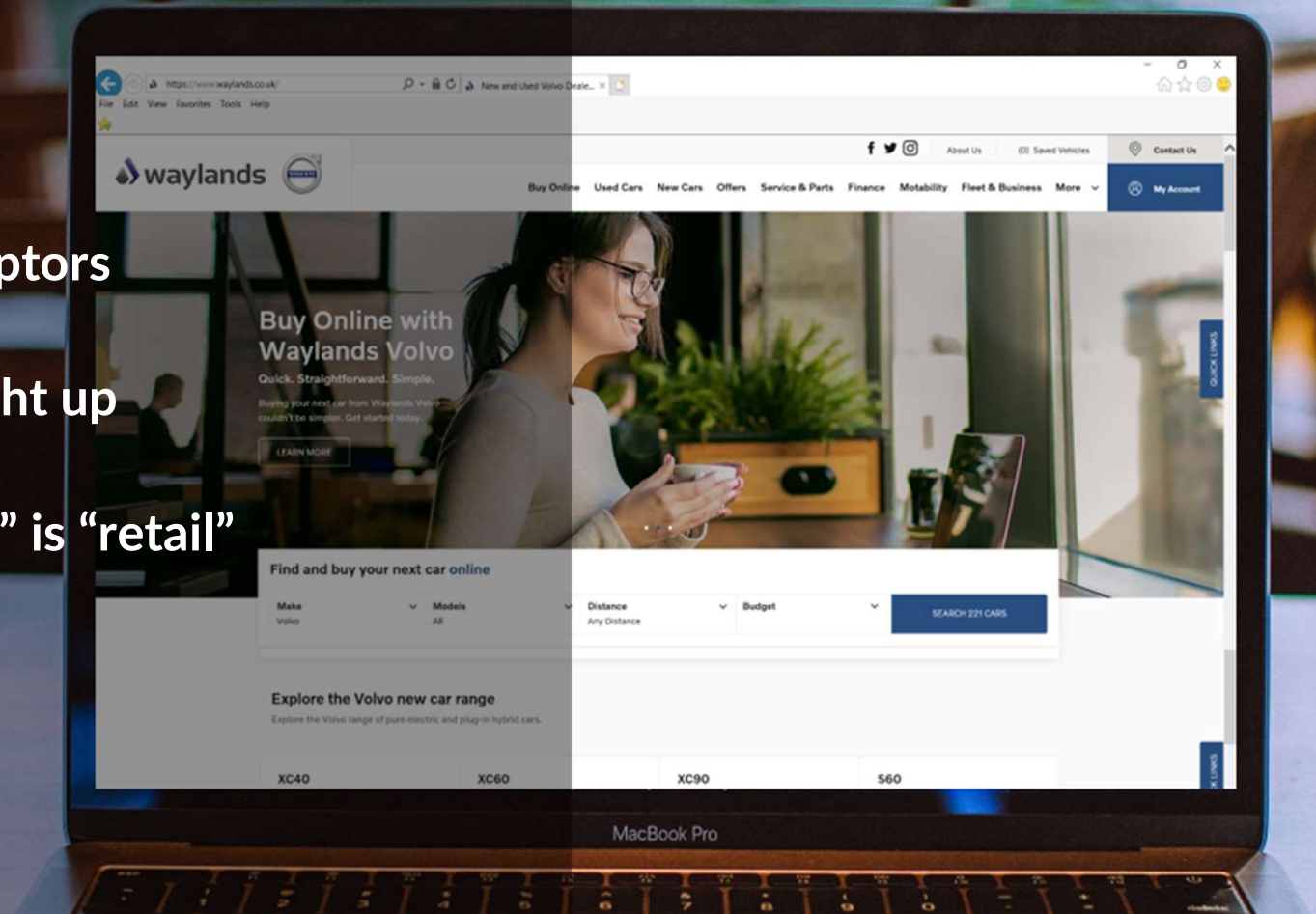
- Medium term effect – but we must adapt now
- Parc growth can only partially offset
- Retention improvement
 - EV service plans
 - Annual EVHC
 - Software update deployment

An aerial photograph of a winding asphalt road with yellow double lines, curving through a dense, lush green forest. A dark car is visible on the road in the lower portion of the frame. The text "Digital..." is overlaid in white on the left side of the image.

Digital...

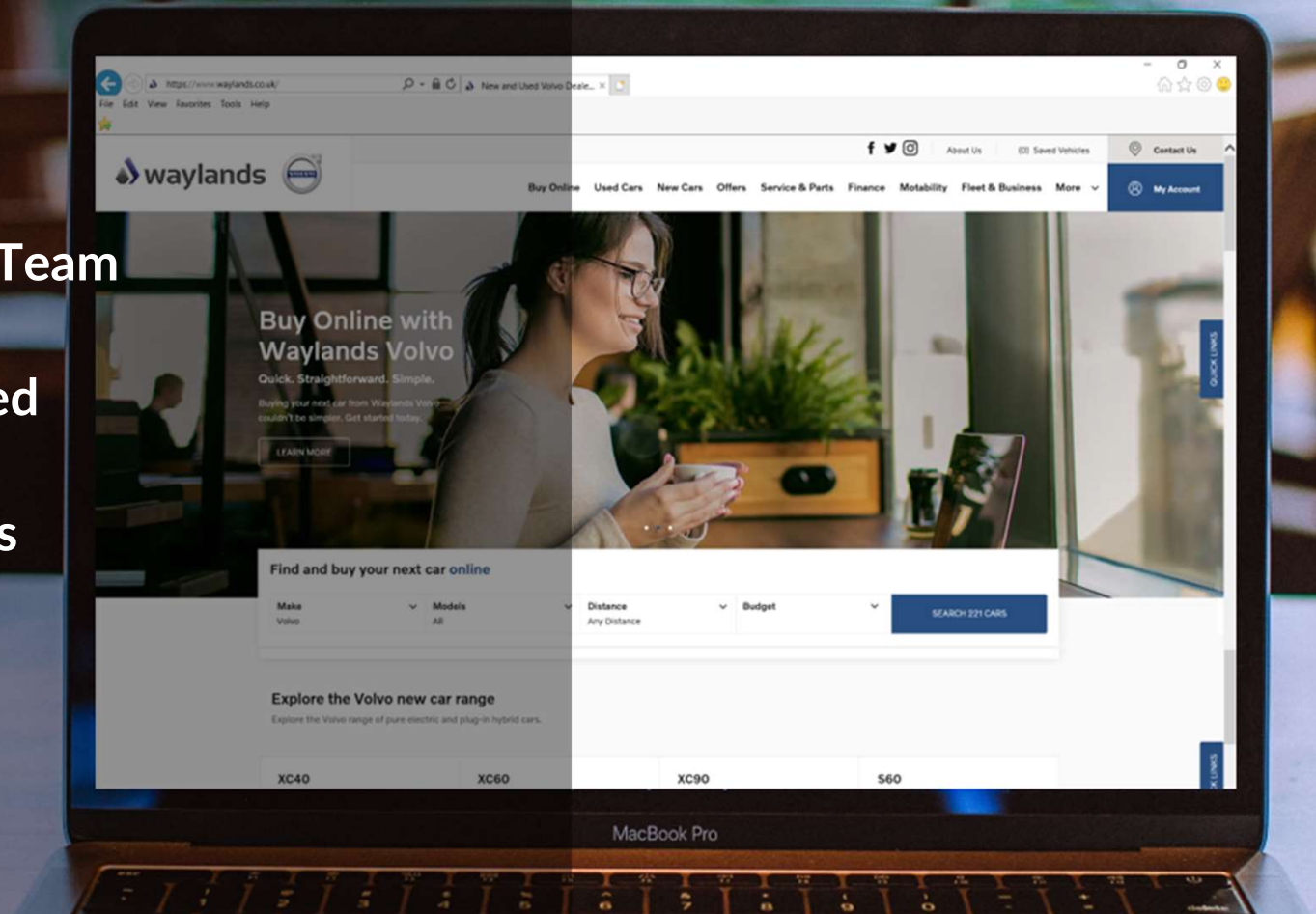
Digital Forecourt

- Lessons from disruptors
- Sector rapidly caught up
- Now “omnichannel” is “retail”

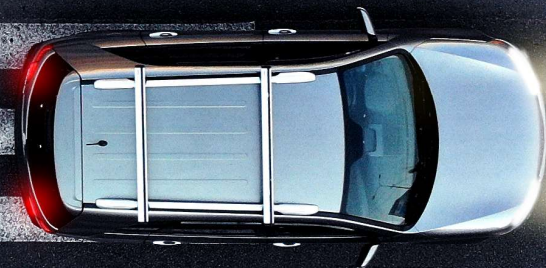


Adapting approach

- Digital Experience Team
- PG scheme launched
- Digitising processes
- Evolve to Agency



Development



Final Points...



Final Points...

- Supply and regulatory driven pressures “pushing” the market
- New entrants are coming
- Consolidation will and needs to continue
- Future Scale Partnerships should be today’s focus...

SCALE AND SPEED will be the critical factors for success



To Close

- We now understand more about R.E.D
- Challenges have now grown – structural and economic
- Strong and meaningful partnerships will prevail