URBANIZATION AS A DISRUPTOR?

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Is The Trend Toward Urbanization Disruptive?
U.S. = 83% urban now ⇒ 87% by 2025:
Europe 77% ⇒ 82%, China 52% ⇒ 71%,

City leaders and their teams (urban and transportation planners) are all focused on congestion control.

No, but the resultant congestion is the disruptor.

The economic vitality of a city depends first and foremost on assuredly fluid mobility.
Phenomena Seen by Many As Disruptors Are In Fact The Enablers of Change
Change is Already Occurring

Post-recession, about half the studied global cities experienced declines in motorization.

Prior to the recession, about 1/3 of the studied global cities saw motorization declines.

Note: Sample size is larger.
Many combinations of alternative travel modes can work to achieve desired levels of mobility.

Transport Mode Shares in Model Cities and Their Metro Levels of Motorization

<table>
<thead>
<tr>
<th>City</th>
<th>Transport Mode Shares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delhi</td>
<td>Walk: 100 Bicycle: 50 Car: 50 Taxi: 50 P Transit: 50 Not Spec'd: 0</td>
</tr>
<tr>
<td>Bangalore</td>
<td>Walk: 75 Bicycle: 50 Car: 50 Taxi: 50 P Transit: 50 Not Spec'd: 0</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>Walk: 64 Bicycle: 49 Car: 386 Taxi: 321 P Transit: 192 Not Spec'd: 0</td>
</tr>
</tbody>
</table>

Note: Virtual mobility and car sharing are not included in this data set!
Key Finding..
Global market may “top out” at ~100 million units:
Opportunity: People will still need mechanized mobility

Opportunity for Alternative Modes of Transport

- Base (LV Sales)
- City Constrained (Sales)
- World Capacity (straight time)
Alternative technical solutions range from the simple to the sublime
Alternative business models focus on mobility as a service rather than cars as a product.
Thanks!

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The first major transformation of the auto industry since Benz, Daimler, Panhard, Ford and Kettering

**Virtual**
- Telephone
  - Personal and business
  - Voice communication
- Digitally Connected Consumer
  - Peer-to-peer
  - Person-to-business
- Business and personal multimedia information, entertainment and shopping
- New Opportunities: Virtual Phenomena

**Physical**
- Automobile
  - Personal & business, Physical transport, entertainment and shopping
- Physically Connected Consumer
  - Peer-to-peer
  - Person-to-business
- Business and private multi media (goods) information, entertainment and shopping
- New Opportunities: Physical Phenomena
- Mass Transit
  - Intermodal transparency and fluidity through communications
- Car Sharing

New Opportunities: Combined Physical and Virtual Phenomena

By Bollore

Ford’s 25 Global Mobility Experiments

Autonomous Car
Open Auto Alliance

Apple
Sony

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