

CARMAGEDDON

LEADING THE WAY

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Overview



- background and purpose
- evolution v revolution
- how and why of disruption for industry
- known disruptors
- aspirations and need for transformation



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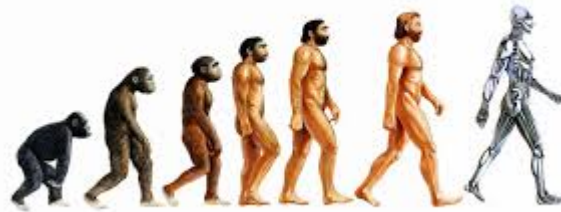


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Evolution v revolution




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How and why of disruption

- next 3-10 yrs. will see more tech change than the past 300 yrs.
 - technology is the **how** of disruption
 - **embraced** by business but not consumed
 - **intuitive** and end user designed
 - **engage** with what might be and **not what is**
 - **disruption** is the **new norm** for all industries
 - Predictions are constantly changing and timelines 
- humans are the why of change
 - smart phones have **exacerbated** human expectations
 - **connected, mobile, and productive**
 - all things are **wired and intelligent**

LEADING ?

THE AUTO INDUSTRY

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Known Disruptors

- software will disrupt most industries (0-10 yr)
 - Uber, Airbnb, and IBM Watson provides legal advice within sec, capable of diagnosing cancer 4 x more accurately than humans
 - **AV and AI** will cause huge disruption from 2020 – its already started. **2022** is the year of impact
 - ownership and sale models will change dramatically
 - tech companies are doing the revolutionary thing
 - R&D invest \$200m, 2013-\$1.1b-2016



- Existing use of car 90:10, new use of car 10:90
 - 1.2m die every year from car accidents (1 accident/100k km with AV 1 accident/10m km) what does this mean for population? What does this mean for insurance? tech manufacturers will back their own.
- Electric vehicles will become mainstream by 2020
 - Electricity will become cheaper and cleaner
 - Eu countries announced end date for combustion eng
 - OEMs have announced end dates for production



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- **3D printing:** The price of the cheapest 3D printer came down from \$18,000 to \$400 within 10 years. In the same time, it became 100 times faster.
 - new smart phones will have 3D scanning possibilities.
 - By 2025 more than 10% of everything produced will be 3d printed
 - Airplane parts are already 3D printed in remote airports.
 - Space stations now have a 3D printer that eliminates the need to transport spare parts.
 - 3D printing will redefine manufacturing



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Aspirations and need for transformation

- 70-80% of jobs that exist today will disappear/transform
- competitive value is likely to exist in human traits
- businesses must be agile and transformative
- start ups will win and loose faster
- collaboration will be key
- open innovation is a real possibility
- high volume, low cost business models
- this is exciting...starting now is important



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- Humans...

- *right now, the average life span increases by 3 months per year (80yrs) and by 2030 there will be more than one year increase per year*
 - What new markets come from this?
 - AV will mobilise this population who were once house or hospital confined...
 - How will superannuation schemes respond?
 - What workforce impact will this have?
- human expectations and their readiness
- *AV and AI is an evolution*



- **...the future of industry is about holistic business models...**
 - its no longer about minor improvements its about significant transformation
 - anything that cannot be automated will become extremely valuable (creativity, imagination and intuition)
 - human obsession/need for technology is the disruptor for **business**
 - business and their emerging needs is **our** disruptor
 - if we are doing our job right we will disrupt **government**
- I'm confident we are opting to drive change rather than be driven by it...its exciting its opportunity



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