
Discover Mobility
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600€

AVERAGE MONTHLY COST OF
PRIVATE CAR OWNERSHIP IN GERMANY

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2016

97%

HOW OFTEN A PRIVATE CAR IS PARKED

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CAR SHARING OR THE BEST IDEA EVER?

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2016

HAT IF THE SOLUTION WERE MULTIMODALIT

A FLICHT TO CATCH?

A COSY DINNER IN TOWN ?

HOLIDAY PLANS ?

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2016

The landscape consists of several companies operating in different areas of transportation

TAXI & PHV SERVICES

P2P RENTAL

CAR CLUBS

CARPOOLING

ALT. TRANSPORT SHARING

AGGREGATORS

SERVICE SPECIFIC SHARING

Source: Company Websites
Note: Some companies operate across sectors

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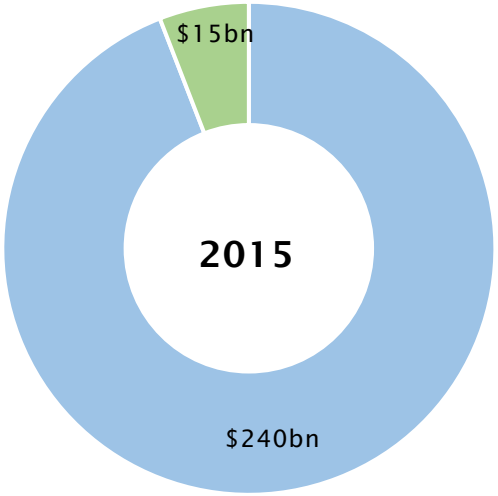
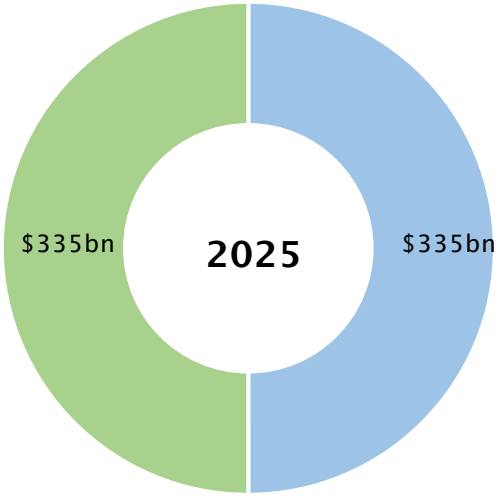
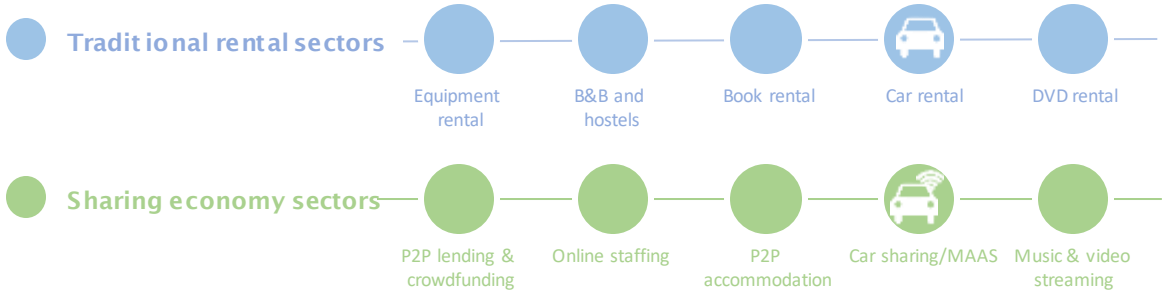
We live in a unique time where new platforms centered around sharing economy are experiencing vast growth







Source: PwC; KPMG
Note: Annual industry turnover; UK share projected at around 6% ($15bn) of sharing economy

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Transportation in particular is seen as an industry which will drive a significant share of the future revenue in the sharing economy

CAR RENTAL

2% CAGR

2015

2025

CAR SHARING

23% CAGR

$2.9bn
In 2025

Source: PwC; KPMG; Navigant Research
Note: CAGR from 2015-2025; Data for UK

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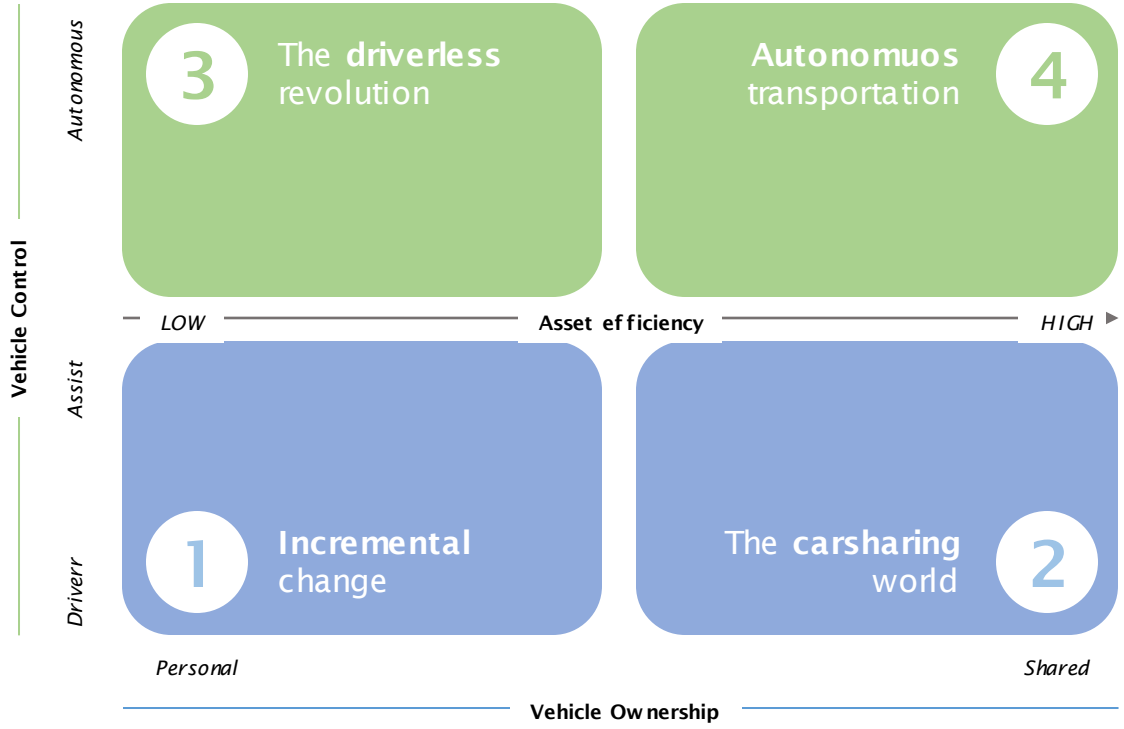
WHERE IS THE FUTURE?

The future of the transportation industry has several potential states which could co-exist



Source: Deloitte; VentureBeat

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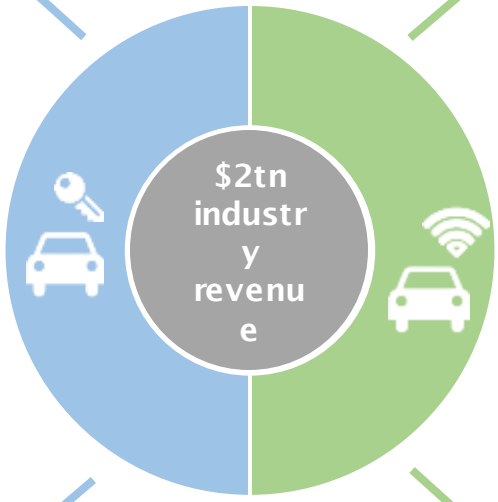
Extending our look, we can define 2 distinct views on the future of mobility and transportation

Incumbent view

The industry will evolve **naturally** toward a setup **rooted** in what exists today

The current eco-system including assets and key players will **remain intact** while **change occurs gradually**

We are dually focused on **sustaining** the **current model** along with testing change in **small ways** through small bets



Disruptor view

There will be a whole new age in transportation which features fully **autonomous cars** accesible **on demand**

We are approaoching a **tippping point** where **change** will be **unstoppable**

New **tech giants** are **catalysts** of transformation – NOT traditional car companies

We **don't** have any **vested stake** in protecting today's system

Source: Deloitte; VentureBeat
Note: Notable tech companies include f.e. Google, Apple, Uber

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A car just when you need it

- Established in France in 2008 in B2B
- Backed by Europcar Groups since 2015
- Operating in 10 cities in 6 countries across Europe
- Capturing the potential of new mobility in the sharing economy in b2c and b2b

TAXI & PHV

CAR Sahring

CAR RENTAL

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Dr. Max Kury

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Backup

The benefits of "new mobility" are vast

STAGE	COST PER MILE	MAIN COST DRIVERS
1 **Incremental** change	$0.97	• Cost of driver's time • Insurance • Vehicle depreciation
2 The **carsharing** world	$0.63	• Cost of hired driver • Ridesharing profit for company and/or • provider
3 The **driverless** revolution	$0.46	• Safer cars, and as a result, lower insurance premium • No driver cost
4 **Autonomuos** transportation	$0.31	• Safer cars, and as a result, lower insurance premium • No driver cost • Low vehicle depreciation

Source: Deloitte analysis
Note: Analysis is based on single-person trips

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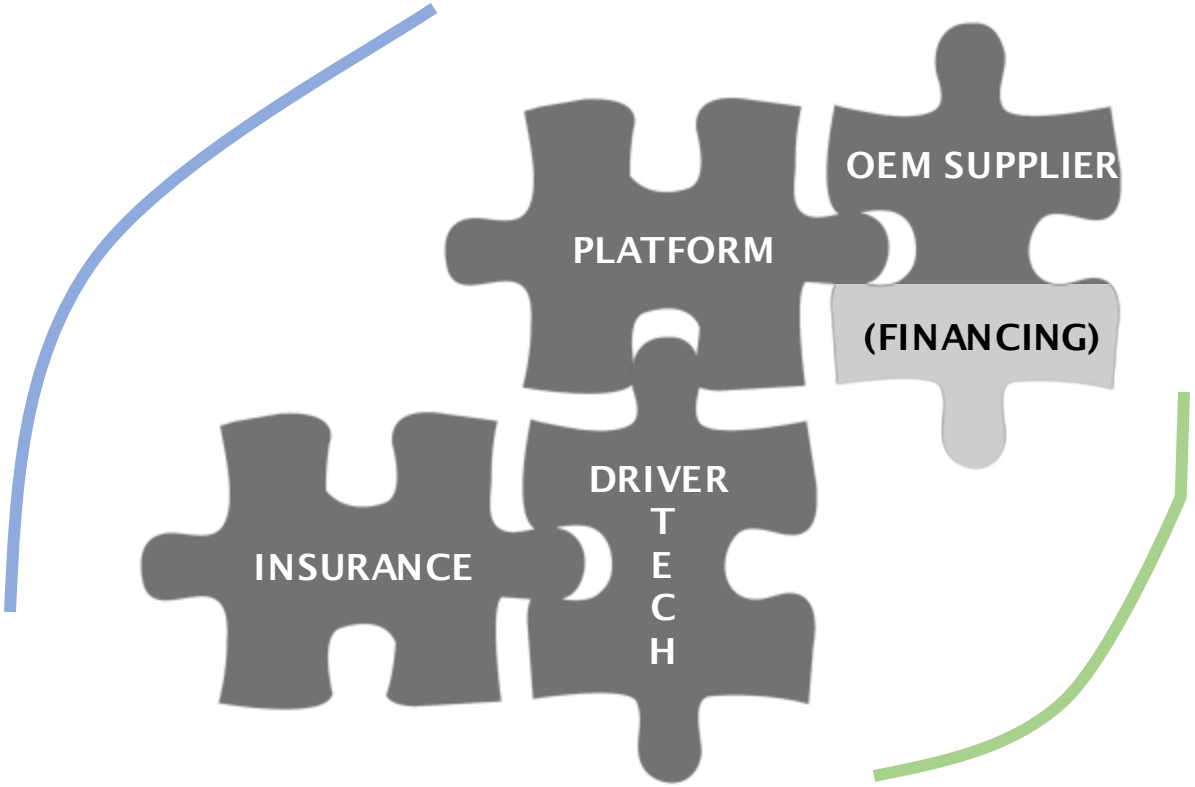
The next big company will depend on who best combines the core pillars of the future eco-system



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There are 6 different levels when talking about fully autonomous transportation

0	Human controls all steering
1	Includes some features such as cruise control and parking assistance
2	Automated system executes accelerating, braking and steering
3	Driver can turn attention away from driving tasks in known limited environments
4	Fully automated system which can control all the safety-critical functions and monitor road conditions
5	Driver sets destination, but no option for human driving

EXAMPLE CAR

Source: Society of Automotive Engineers (SAE)
Note: Alternative classification includes 5 stages defined by NHTSA

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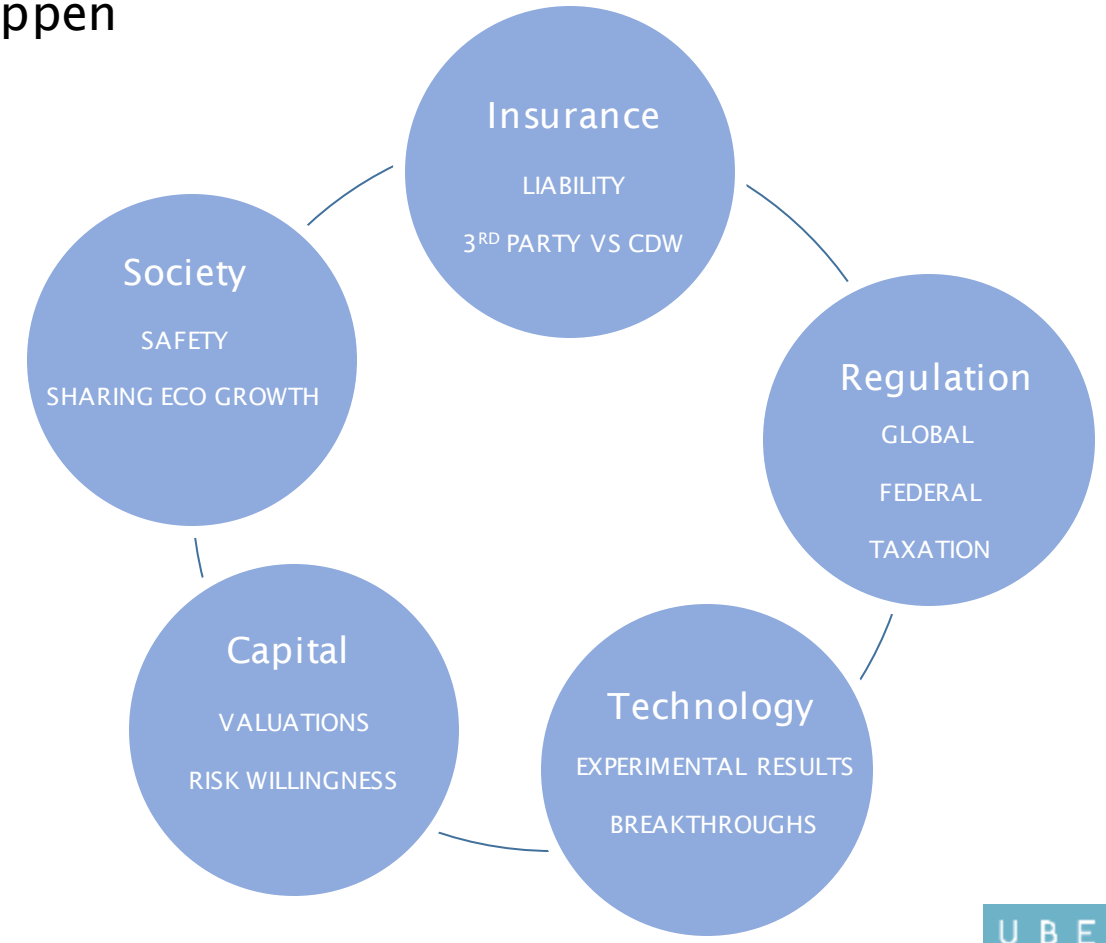
Several factors affect the velocity at which change will happen



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