

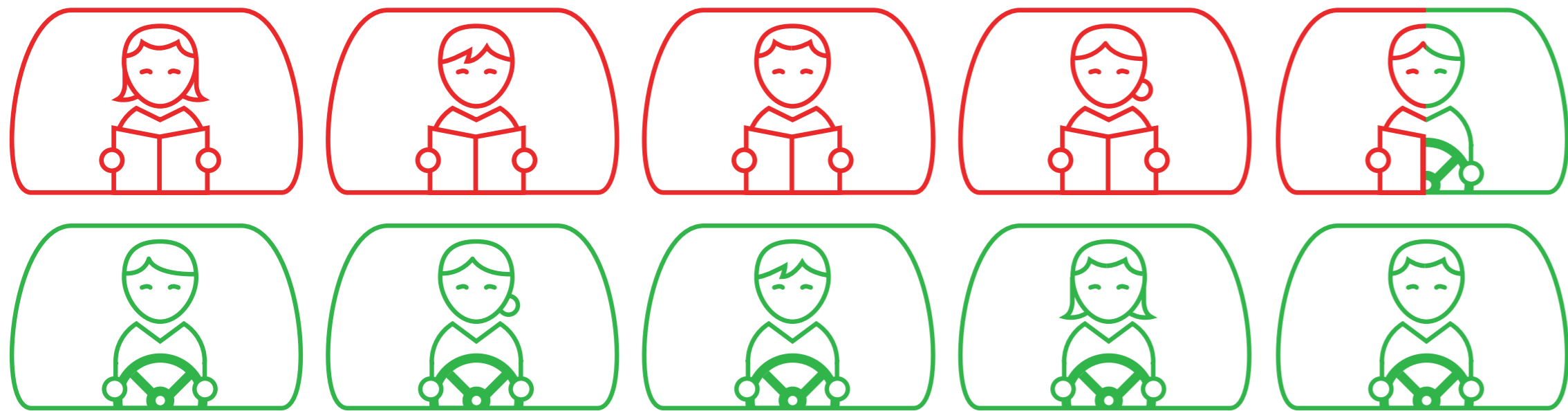
New mobility services and autonomous driving: Where's the car industry heading?

CONSUMER PREFERENCES CHANGING

Growing interest in new mobility services

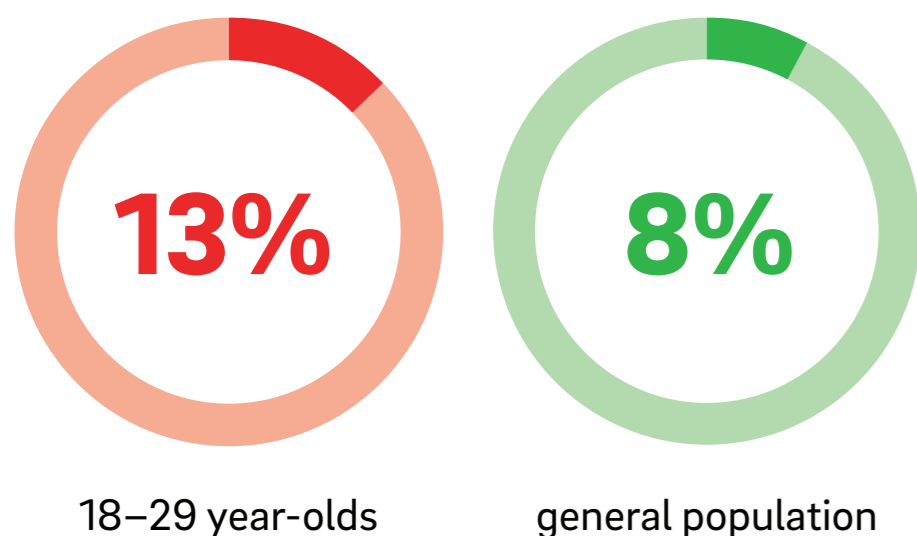
45% of drivers wouldn't buy a car again if the cost of using RoboCabs fell below costs of using an own car

45%



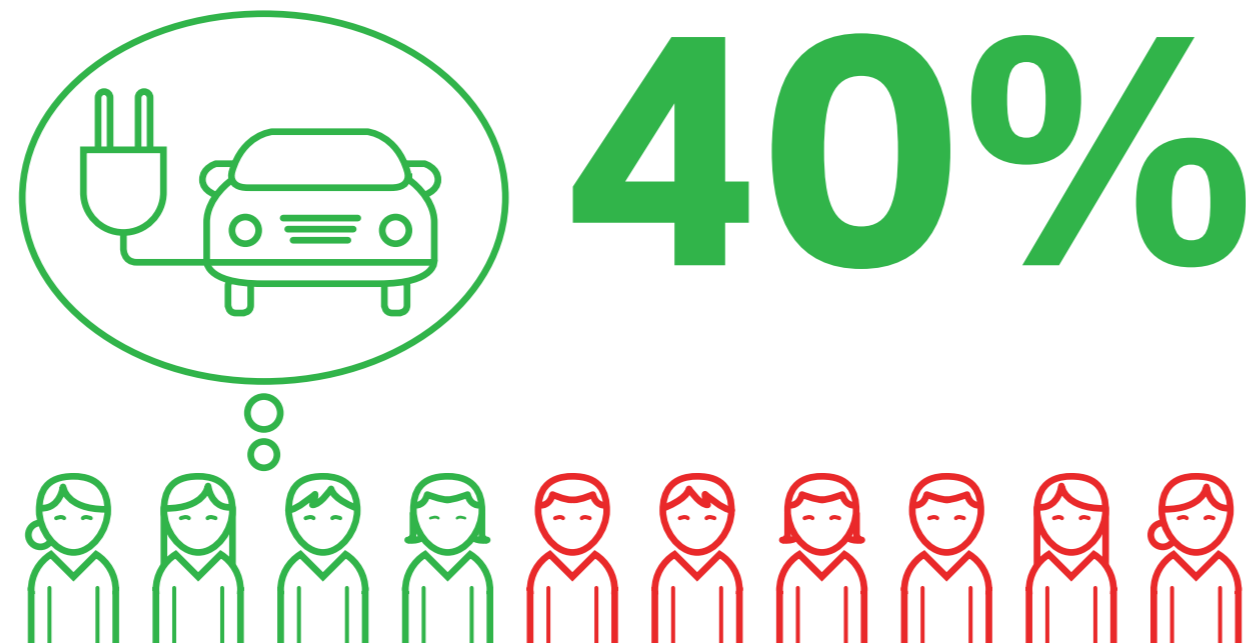
YOUNG PEOPLE SPEAR-HEADING THE TREND

Among 18-29 year-olds 13% of all rides were shared vs 8% among the general population



COMBUSTION ENGINES LOSING STEAM

40% of customers are considering buying an electric vehicle as their next car



INDUSTRY IS RESPONDING

Money pouring in

Venture capital firms invested USD 25bn in mobility services and AI industries, up from USD 11bn in 2016

25bn



11bn

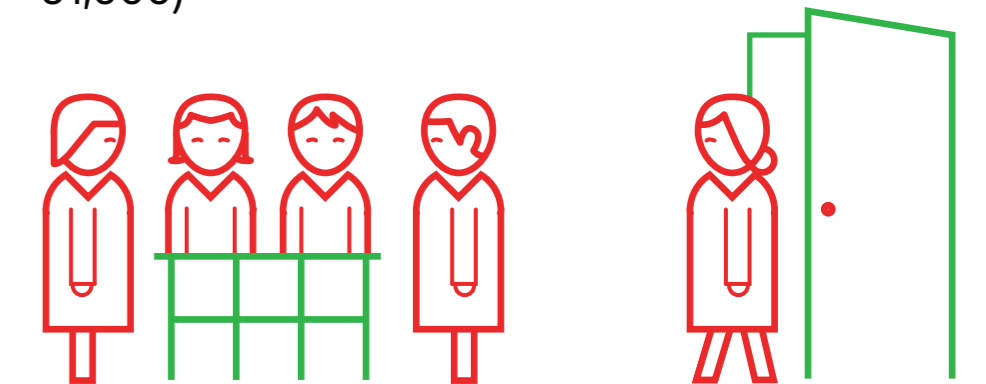


2016

2017

SMART STAFF

The number of R&D personnel working on mobility services and autonomous driving topics jumped by 22.5% in one year (from 41,000 to 51,000)



MORE MODELS ON OFFER

14% of new car models in China were electric vehicles and 13% in Germany (up from 10% and 12% respectively in 2016)



IMPACT OF INNOVATION

2.4% of all patents were related to autonomous functions, up from 1.6% in 2016

