Situation Today: A city built around cars.

Global Megatrends reshape the World.
Urban mobility is changing.

ACCELARATING URBANIZATION

People Living in Urban Areas:

30% — 1950 ▶ 50% — 2016 ▶ 63% — 2030

DEMOGRAPHIC & SOCIAL CHANGE

"The number of cars purchased by people aged 18 to 34 fell by almost 30%.

TECHNOLOGY ADVANCEMENT

unique mobile users:
4.917 billion
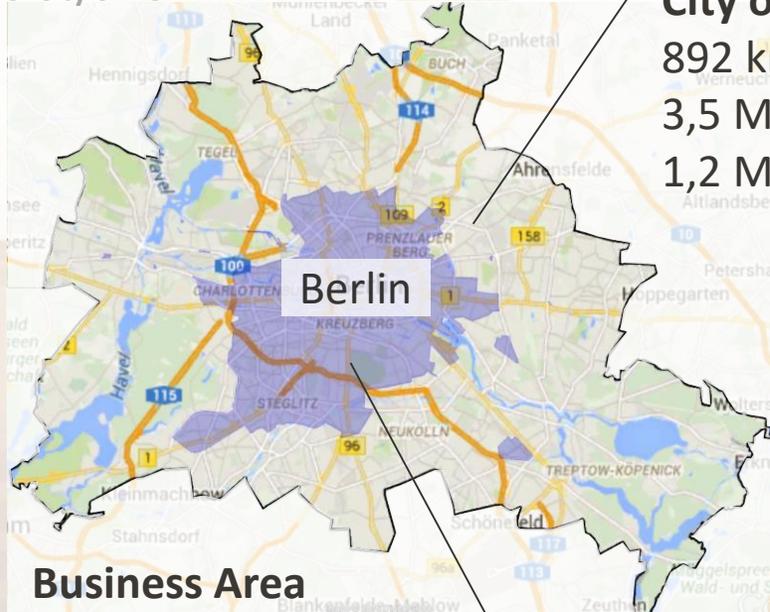66% penetration

"A new digital economy is taking shape.

Source: World Cities Report 2016; Global Digital Report 2017

New mobility solutions are required.
DriveNow Business Model: Easy and intuitive.

Example: City of Berlin

Berlin

City of Berlin

892 km² size

3,5 Mio. inhabitants

1,2 Mio. vehicles

Business Area

155 km² size

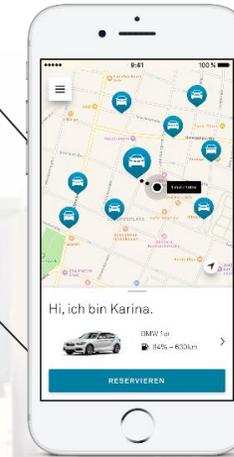1,7 Mio. inhabitants

1.300 DriveNow vehicles

Cars are distributed all over the business area without fixed rental stations
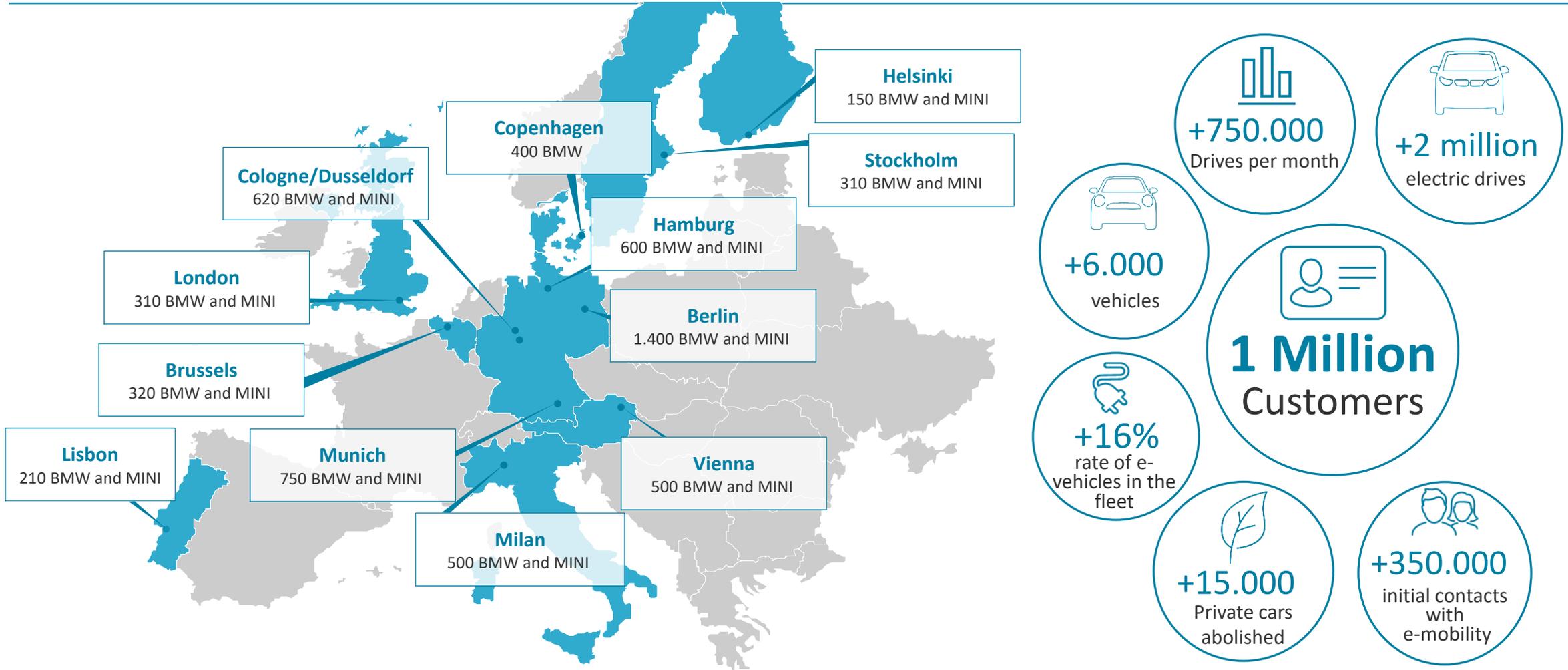
Find a car

Reserve

Open

Close

Hi, ich bin Karina.

Rental process via app

- On-off registration fee
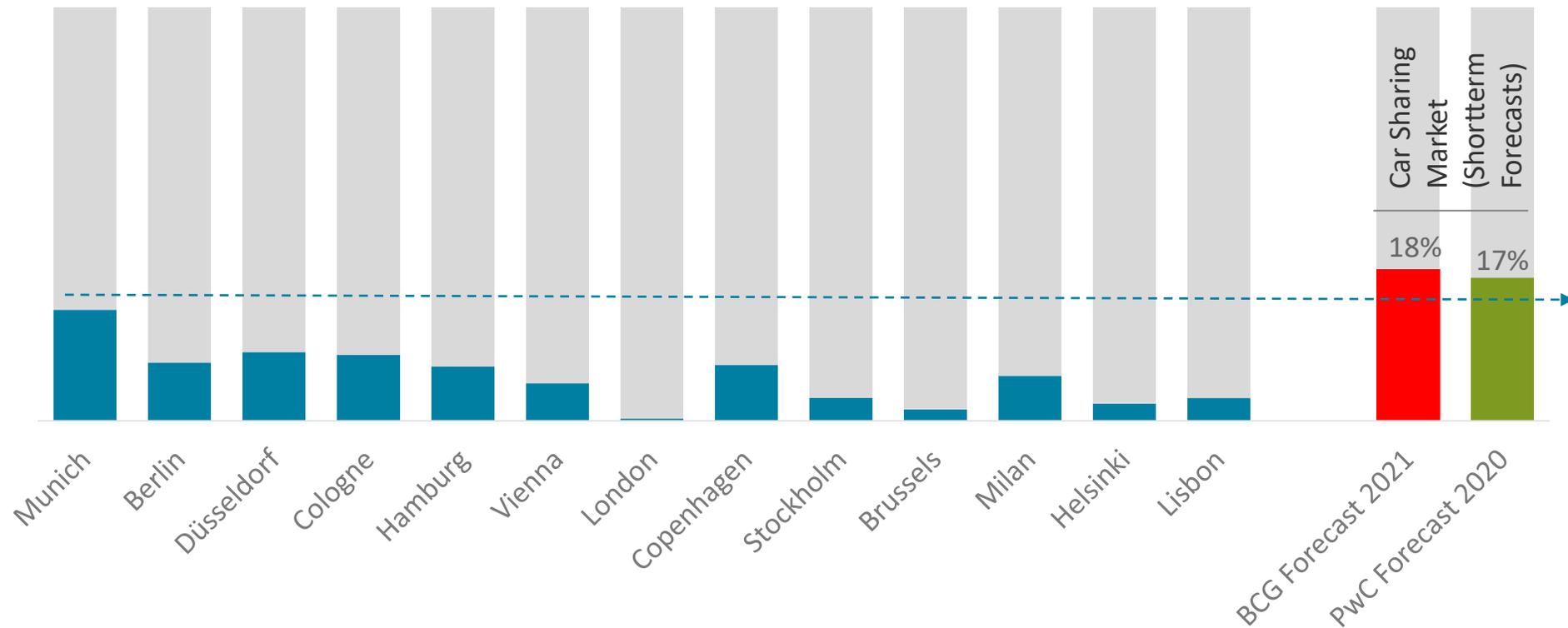- Payment by the minute or by the hour
- No monthly or yearly fixed costs

Pay-per-Use price model

Since the start in June 2011 DriveNow has become available in 13 cities across nine European countries.

Helsinki
150 BMW and MINI

Copenhagen
400 BMW

Stockholm
310 BMW and MINI

Cologne/Dusseldorf
620 BMW and MINI

Hamburg
600 BMW and MINI

London
310 BMW and MINI

Berlin
1.400 BMW and MINI

Brussels
320 BMW and MINI

Lisbon
210 BMW and MINI

Munich
750 BMW and MINI

Vienna
500 BMW and MINI

Milan
500 BMW and MINI

+750.000
Drives per month

+2 million
electric drives

+6.000
vehicles

+16%
rate of e-vehicles in the fleet

1 Million
Customers

+15.000
Private cars abolished

+350.000
initial contacts with e-mobility

DriveNow has already reached significant market penetration and is continously converting new market potential.

DriveNow Customers
[in % of city' inhabitants]

Benchmarks

Munich | Berlin | Düsseldorf | Cologne | Hamburg | Vienna | London | Copenhagen | Stockholm | Brussels | Milan | Helsinki | Lisbon

Car Sharing Market (Shortterm Forecasts)

18% — BCG Forecast 2021
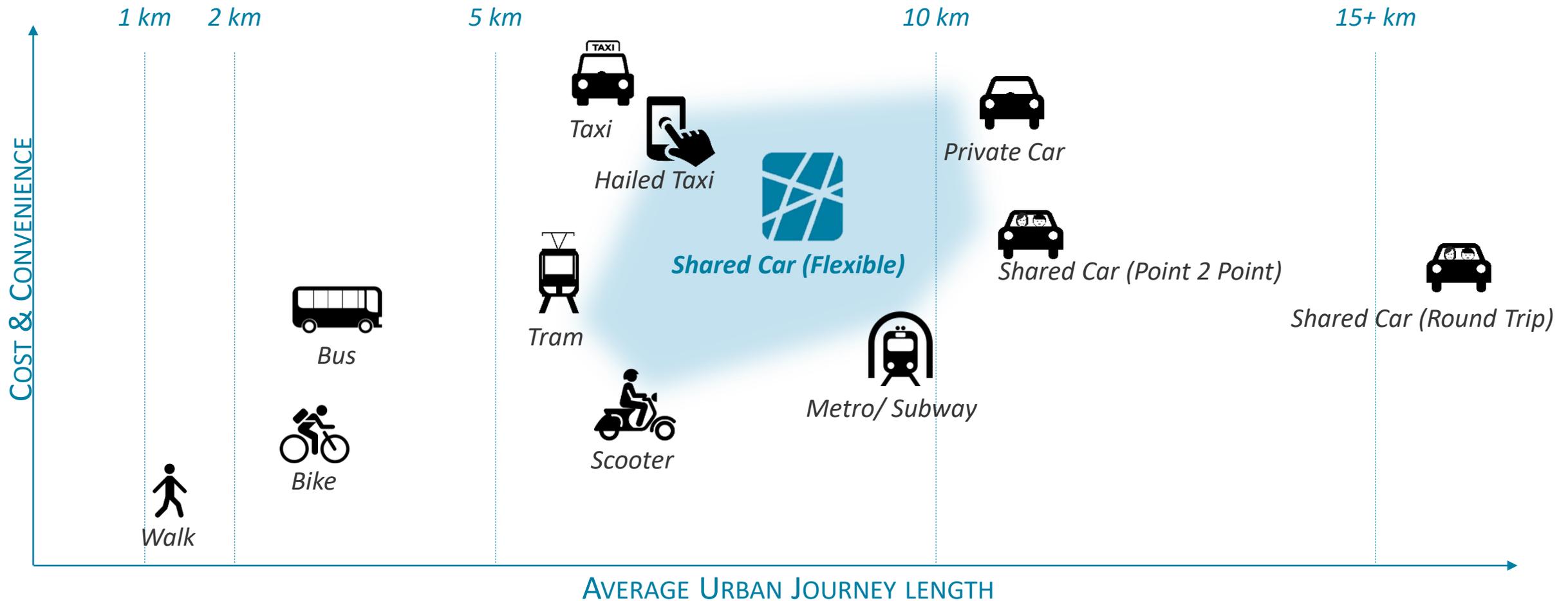17% — PwC Forecast 2020

+2,1 Mio. Customers

Shortterm target is to bring all cities to Munich's market penetration

Source: Wikipedia, DriveNow data, PwC Study 2017, BCG Study 2017

DriveNow is the perfect complement to existing mobility offers...

Cost & Convenience (vertical axis)

1 km   2 km   5 km   10 km   15+ km

Taxi

Hailed Taxi

Shared Car (Flexible)

Private Car

Shared Car (Point 2 Point)

Shared Car (Round Trip)

Tram

Metro/ Subway

Bus

Scooter

Bike

Walk

Average Urban Journey length

...and delivers solutions for various inner-city problems.

1. **Reduction of inner-city traffic.**

2. **Reduction of parking pressure.**

3. **Reduction of emissions.**

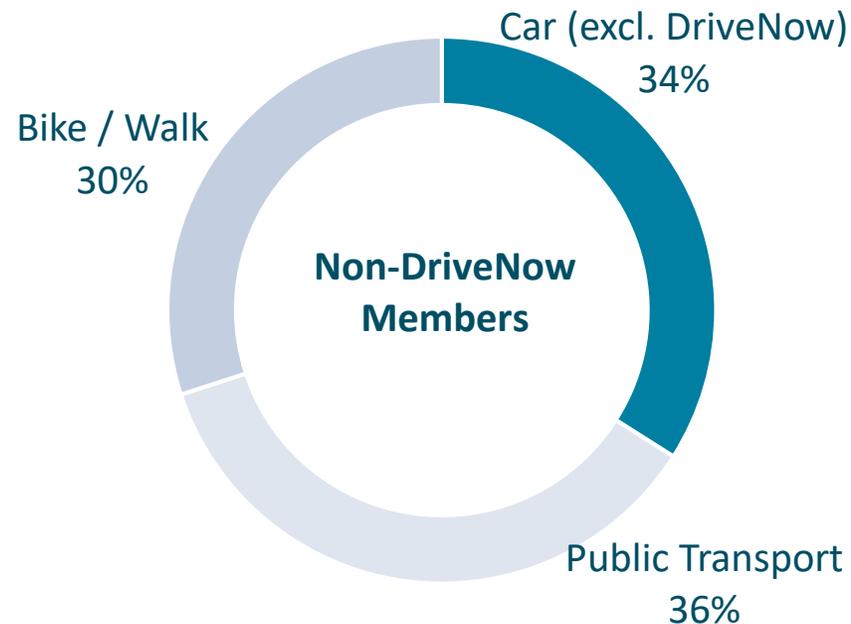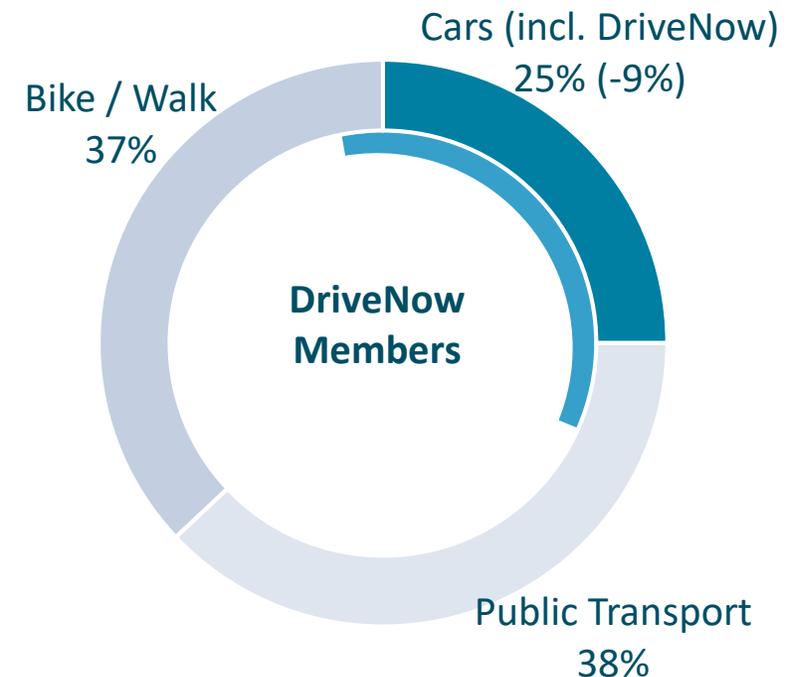# DriveNow is complementing the mobility mix in cities boosting intermodal mobility.

AVERAGE VEHICLE USAGE RATES ACROSS EUROPEAN CITIES

n = 10,802 (survey across 13 European cities)

n = 6,940 (survey across 5 European DriveNow markets)

Non-DriveNow Members

Car (excl. DriveNow) 34%

Bike / Walk 30%

Public Transport 36%

DriveNow Members

Cars (incl. DriveNow) 25% (-9%)

Bike / Walk 37%

Public Transport 38%

"The overall amount of **vehicle km traveled in the City of Munich has been reduced by ca. 41.000.000 km per year** due to the existence of car sharing"

Source: EVA-CS: Evaluation CarSharing Study by the city of Munich

Through several **technological innovations**, DriveNow diminishes park-search traffic.

DRIVENOW IS OFFERING CARS AT THEIR DESTINATION BEFORE ARRIVAL.

DRIVENOW IS DETECTING VEHICLES IN PARK-SEARCH-TRAFFIC...

...rerouting to parking infrastructure nearby

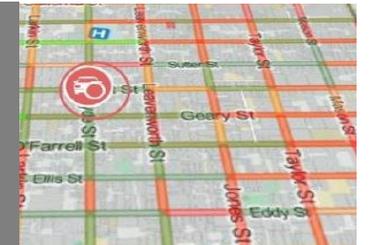|	
Mobility Station	
Charging Station	
Car Park	

...utilizing probabilities and real-time information

Parknav	
Siemens Pilot Project	

One DriveNow vehicle already replaces up to **six private cars** – and is **significantly higher utilized.**

STUDY

Landeshauptstadt München

BMW

StaDt Wien

Berkeley
UNIVERSITY OF CALIFORNIA

ETH zürich

carplus bikeplus
supporting shared transport

DriveNow
CAR2GO
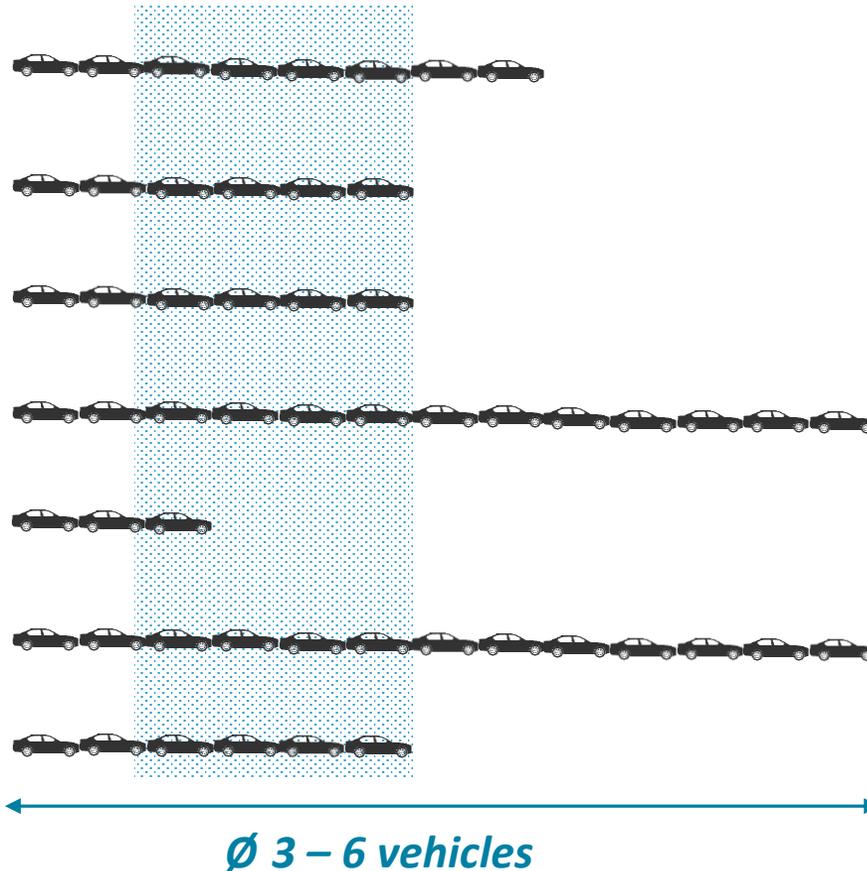
Ø **3 – 6 vehicles**

Privately owned cars
Ø **23 h parked**

DriveNow cars
Ø **3-5h driving**

DriveNow vehicles occupy **less parking space** than privately owned cars due **to their higher utilization.**

Source: EVA-CS: Evaluation CarSharing Study by the city of Munich

DriveNow vehicles produce both less noise and air pollution than most privately owned vehicles.

From...   ...to

► Average vehicle age: 9-11 years

► Average CO_2 emission: 189 g/km

► Average noise level: About 70 decibel

► Average vehicle age: 5-6 months

► Average CO_2 emission: 99 g/km / all vehicles EU6-norm

► Average noise level: About 56 decibel

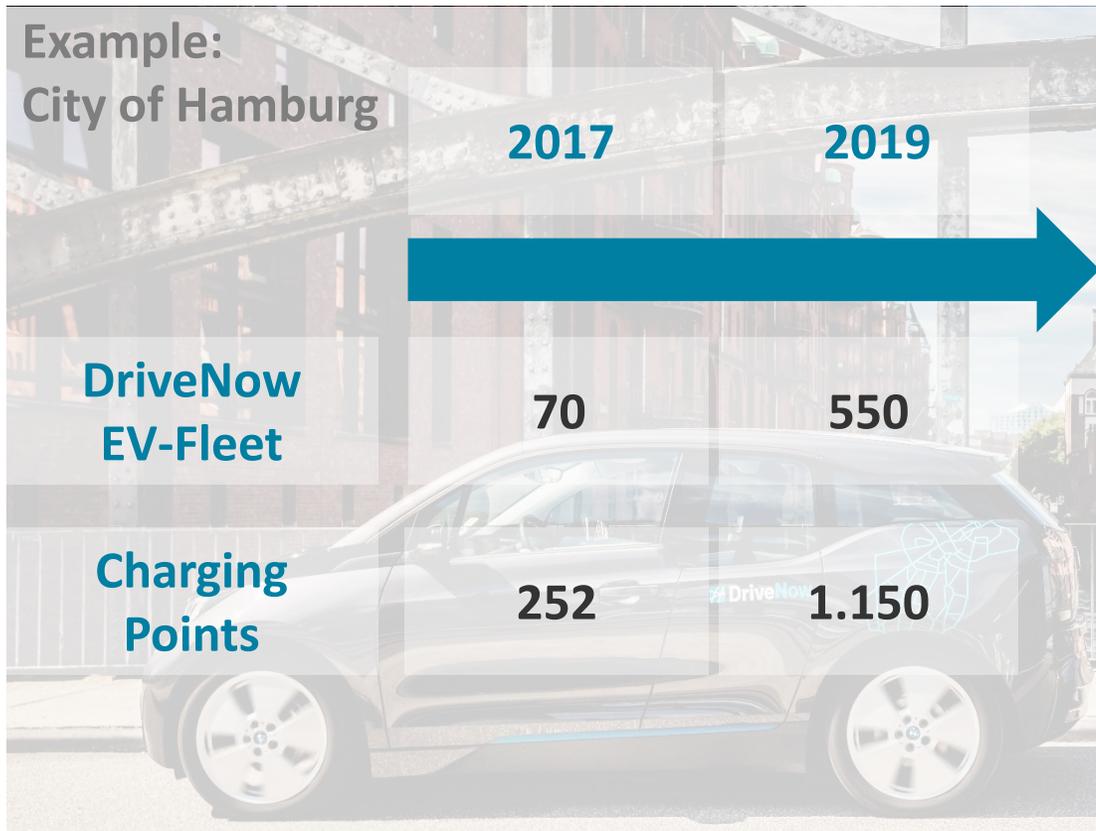The average CO2 emission of o DriveNow vehicle is **48% lower as compared** to privately owned vehicles

To intensify the sustainable effects, DriveNow offers electric vehicles in all of its cities.

DRIVENOW IS ONE OF THE KEY DRIVERS OF ELECTRIC MOBILITY

Example:
City of Hamburg

	2017	2019
DriveNow EV-Fleet	70	550
Charging Points	252	1.150

>2 Mio.
electric drives

>2.500 tons
CO_2 saved

1.000+
electric vehicles

350.000+
initial contacts

Our Vision: A city built around people.

DriveNow

Sebastian Hofelich
CEO

DriveNow GmbH & Co. KG
Seidlstraße 26
80335 Munich, Germany

Carsharing by **BMW i.** MINI SIXT