



GEODESIC
CAPITAL

Mobility Innovation

Perspectives from Late Stage VC

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Geodesic Snapshot

\$465M

AUM

26

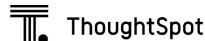
Portfolio Companies

Mid & Late Stage

Investment Focus

16

Team Members



The ways we move people and things are
riding, driving, and flying
into the future

New Paradigms of Mobility



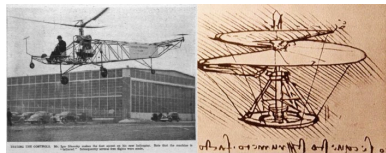
Urban
Mobility



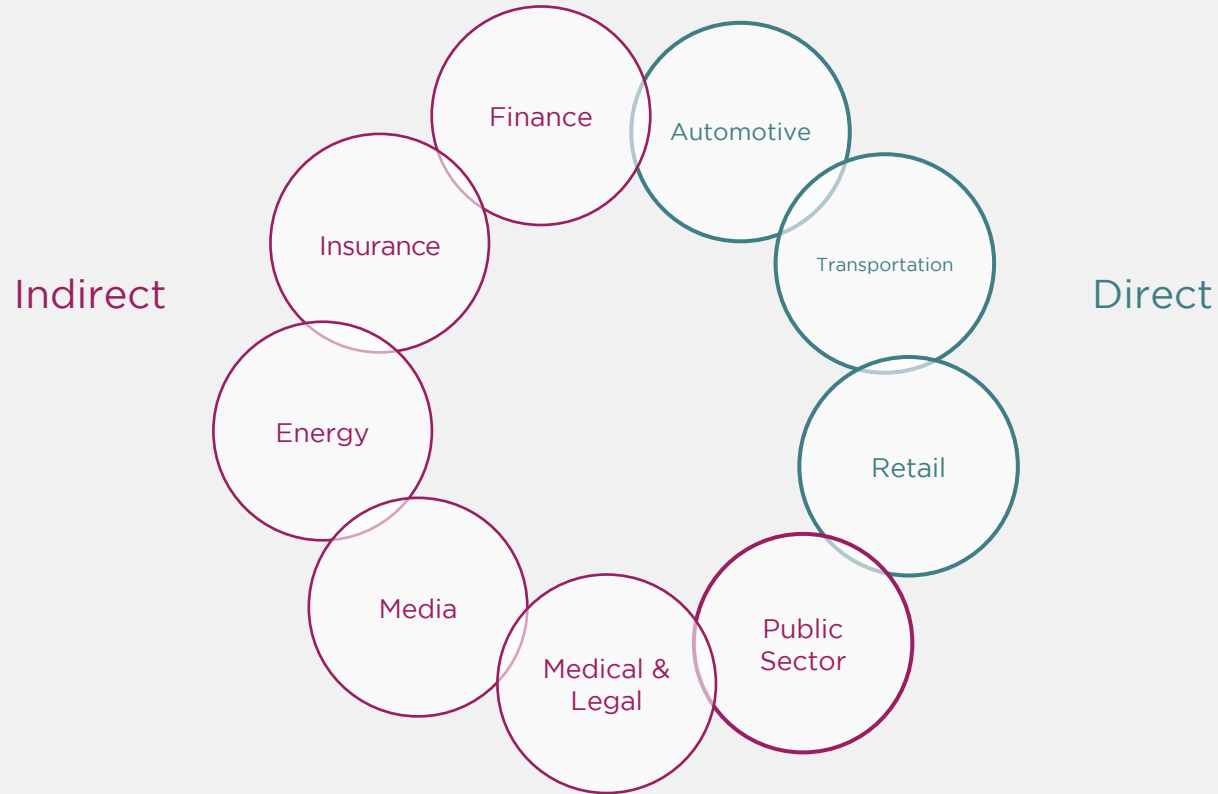
Automotive



Aviation



Implications of Future States of Mobility



Implications of Future States of Mobility

Finance:

- Shift away from auto loans
- Fleet leasing financing options could grow

Insurance:

- Shift from personal liability to systems-wide failure insurance could lead to fewer insurance sales

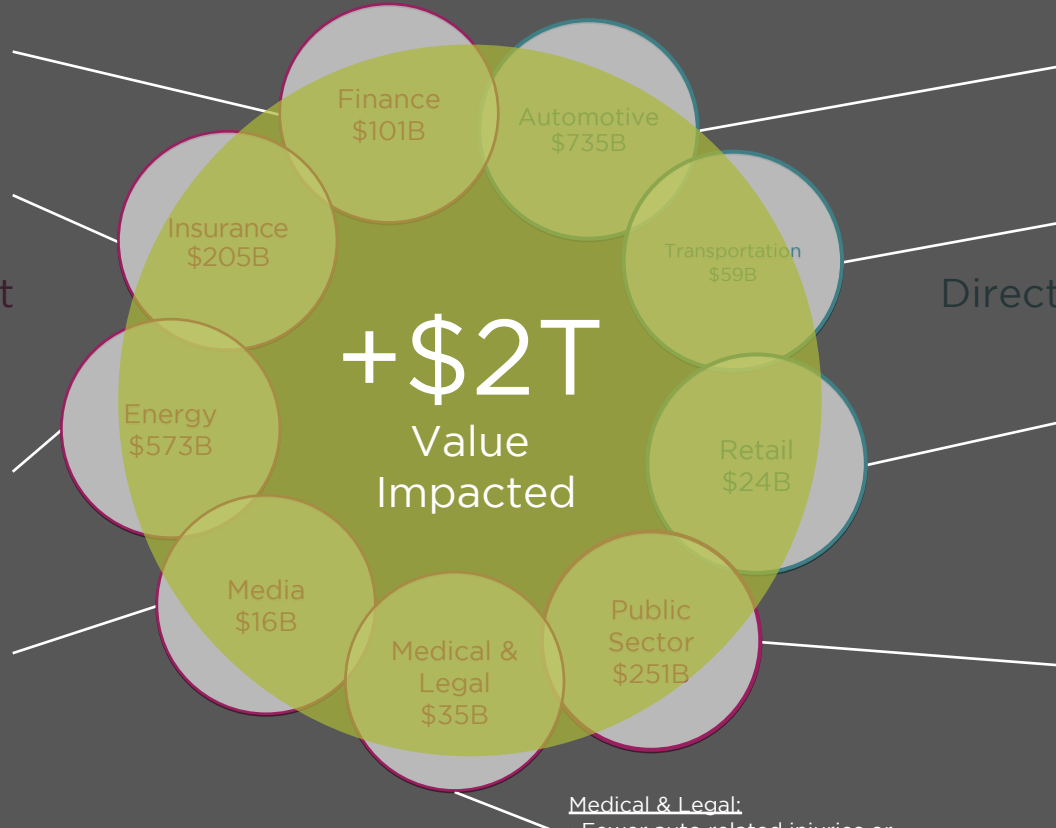
Indirect

Energy:

- Potential for decrease in miles driven in urban areas leading to less pollution
- Also a potential for more miles driven with autonomous

Media:

- Autonomous could lead to more media being consumed in vehicle
- Increases data monetization opportunities



Automotive:

- Decreased personal ownership
- Wider range of vehicle designs

Transportation:

- Shared fleet vehicles
- New business models

Direct

Retail:

- More efficient last mile delivery lowers costs and accelerates the shift away from physical retail

Public Sector:

- Decrease in revenue due to fewer autos
- Change in usage of public transportation

Medical & Legal:

- Fewer auto related injuries or fatalities

Ripple Effects of Mobility Changes

	Immediate	Secondary	Additional
BENEFIT	New Suppliers Tech Enablers	Ride Sharing / Taxis Shipping / Fleets	Real Estate / City Planning Mobility-Related Services
CHANGE	OEMs	Car Rental Insurance	Media Hotels
AT RISK	Slow OEM Adopters and Old Suppliers “Corner Skippers”	Dealerships Public Transportation Energy / Gas	Hospitals Government / Law Enforcement Airlines

Real Social Impact of Self Driving



50 Minutes

Average daily commute
in the U.S.



120 Million

Workers in the U.S.



6 Billion

Minutes/day spent
commuting in the U.S.



39 Million

Minutes (75 years)
average life expectancy



150

Lifetimes wasted
commuting daily in the
U.S.

Safety: Most Accidents Are Avoidable

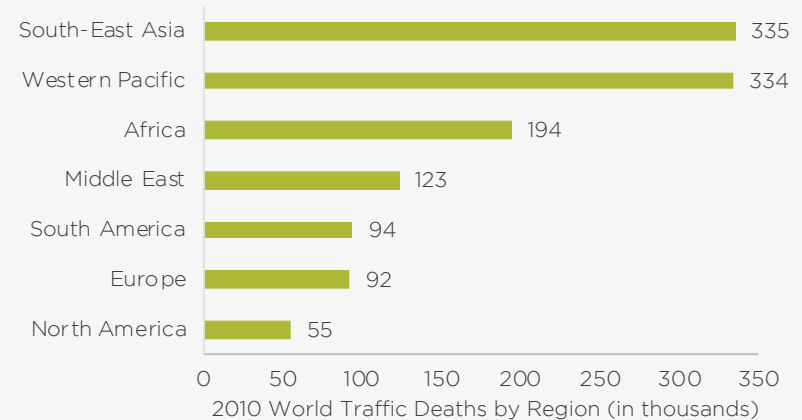
Human Error

- Speeding / Reckless Driving
- Mobile Phone Distraction
- Distracted Driving
- Falling Asleep at Wheel
- Drunk Driving
- Rubber-necking

Non-Human Errors

- Mechanical Failure
- Defective Roadway
- Weather
- Unclear Construction Markings

World Traffic Deaths by Region (2010)

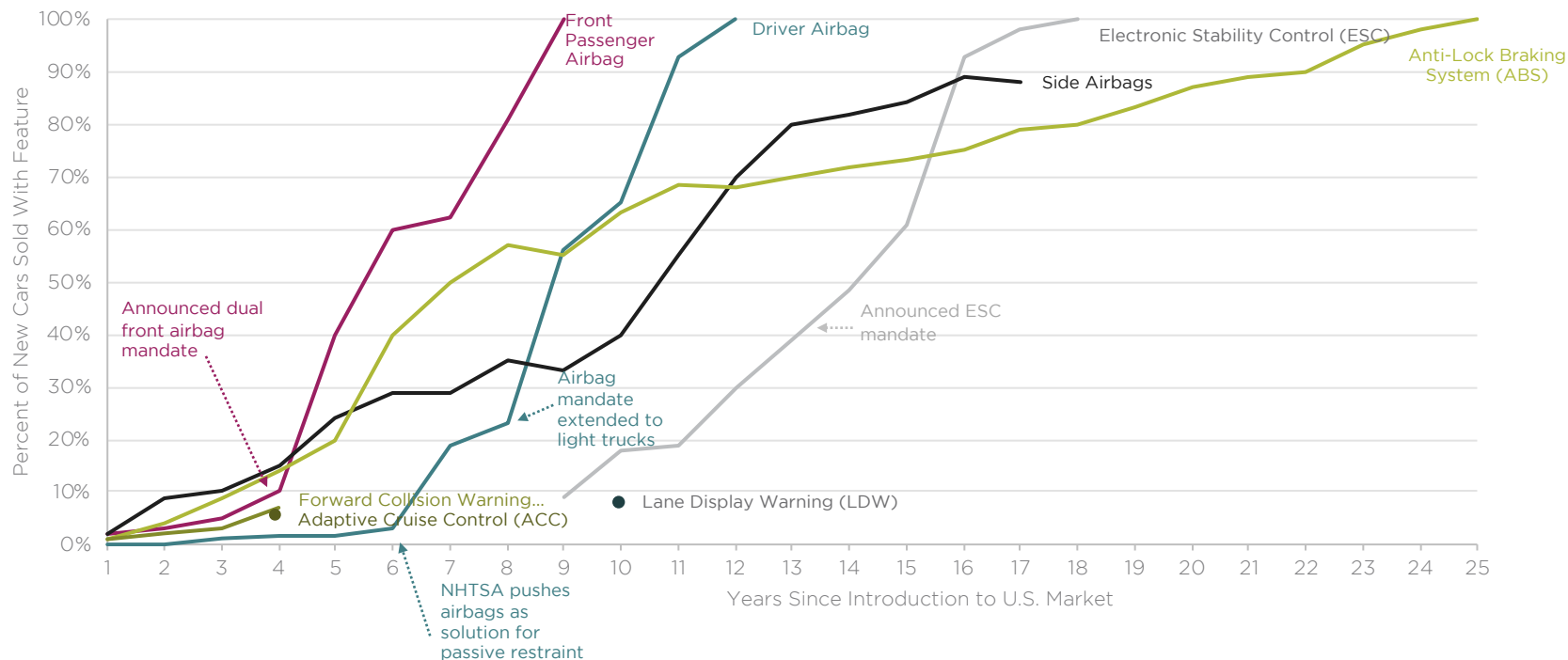


Every year, auto accidents account for 1.3m deaths globally, hundreds of thousands of injuries, and billions of dollars of damage

94% of all accidents are rooted in human error.

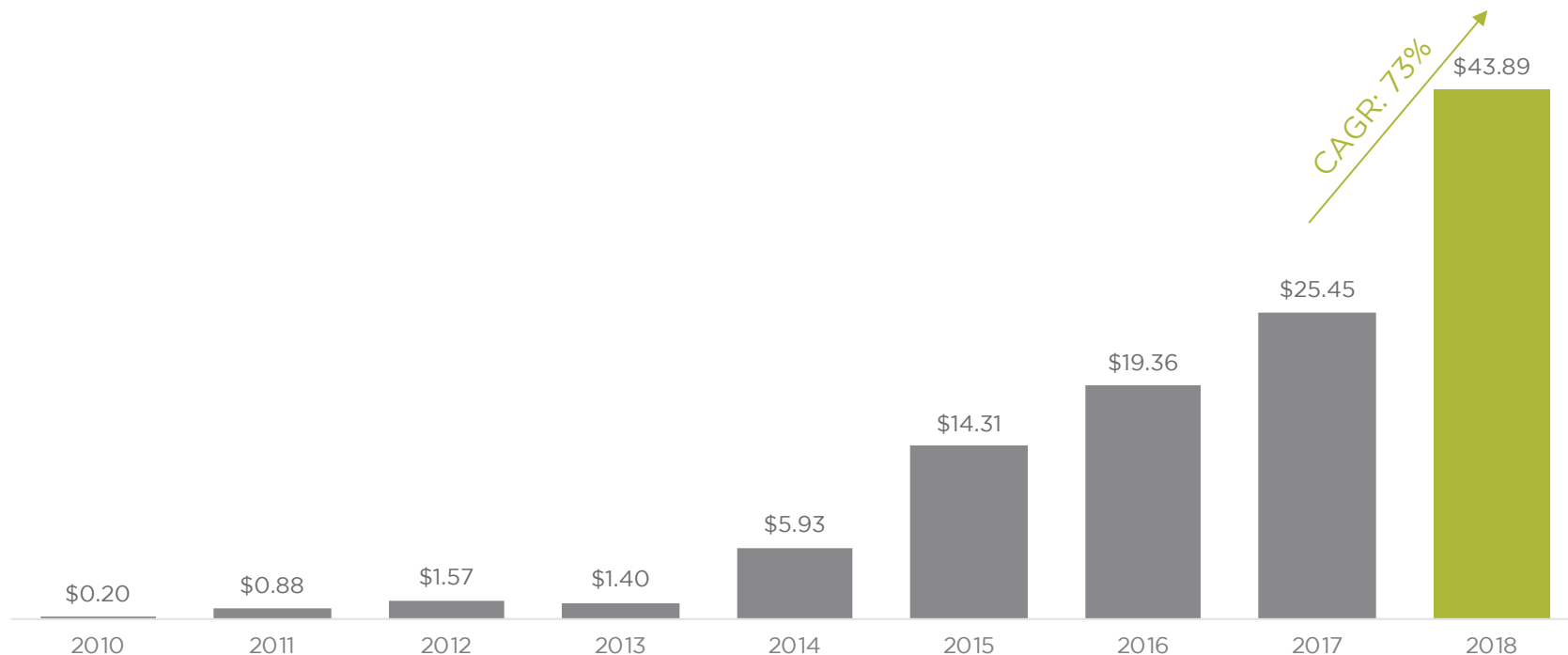
The Race Happens Quickly

Historical Safety Feature Adoption in the U.S.



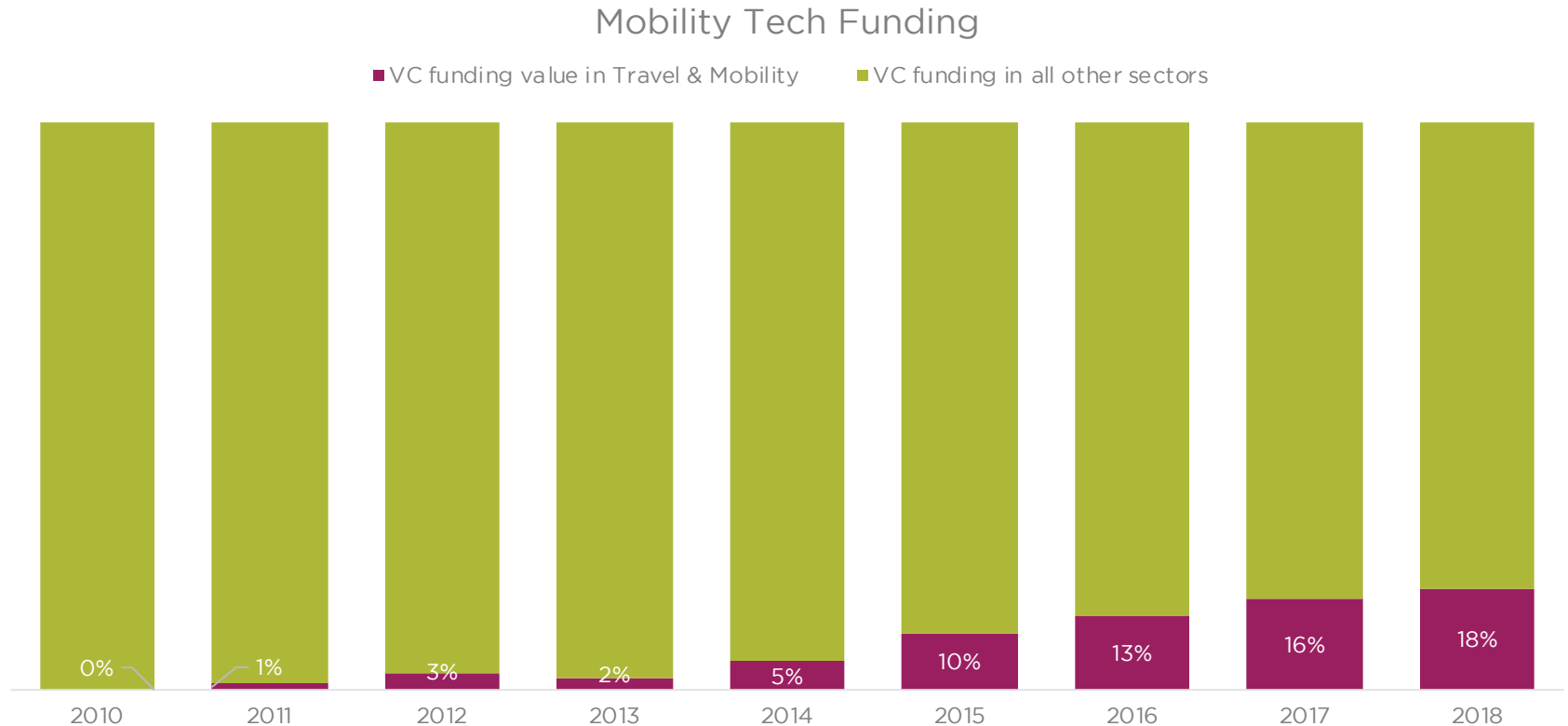
More VC funding than ever before

Mobility Tech Funding
(\$ in billions)



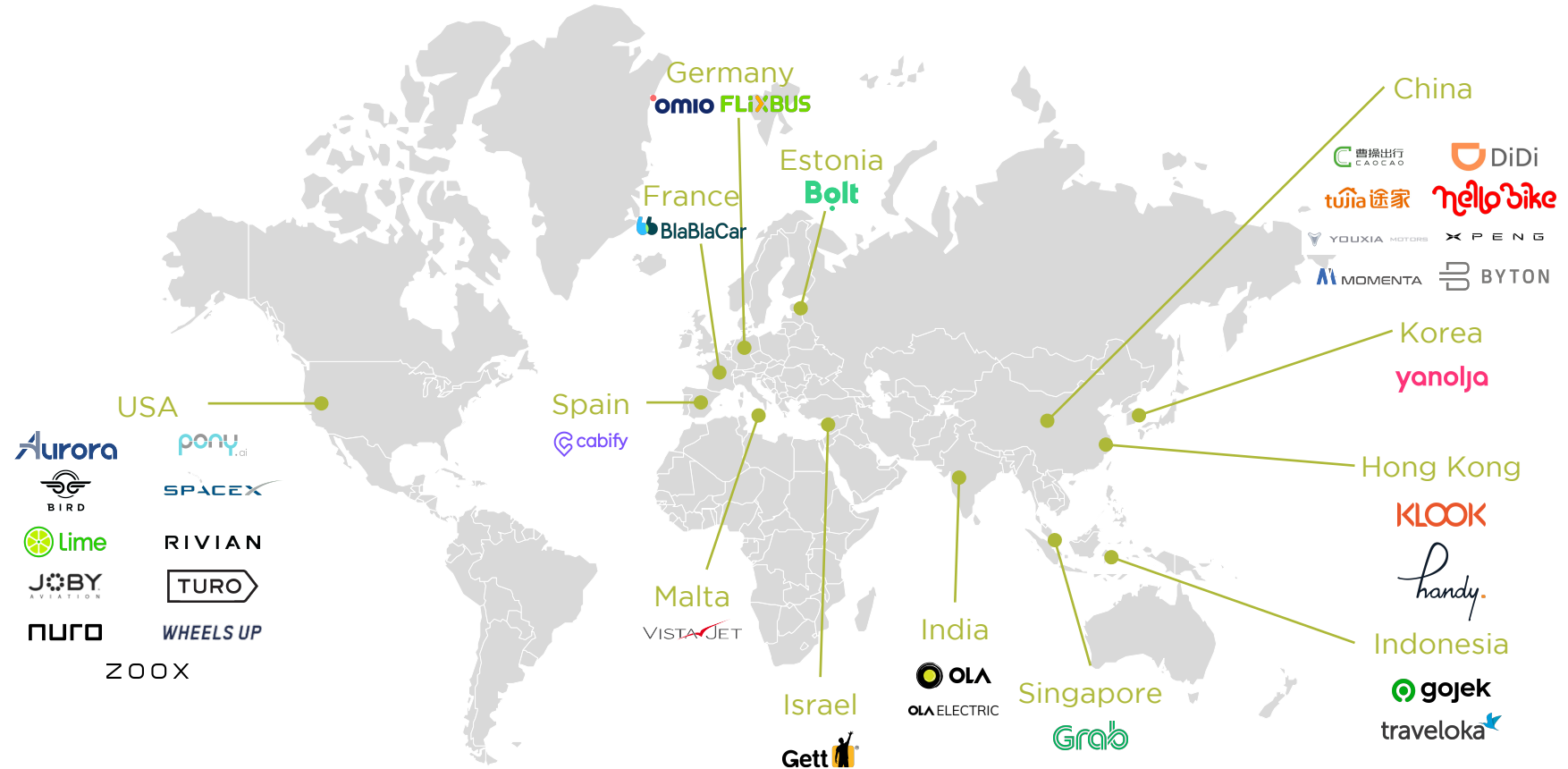
Source: Lufthansa Innovation Hub / travelandmobility.tech, PitchBook, Crunchbase, Press Research

A bigger share of the VC pie



Source: Lufthansa Innovation Hub / travelandmobility.tech, PitchBook, Crunchbase, Press Research

Billion dollar mobility startups are global



Source: Crunchbase, Press Research

Technology Largely Available, What's Stopping Rollout?

Consumer
Acceptance

Research and
Development

Legal
Framework

Regulatory
Framework

OEM Product
Acceptance

Infrastructure



THANK YOU