

# Smart mobility

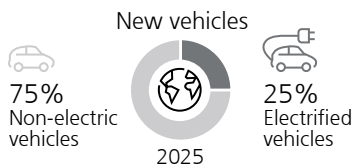
## Longer Term Investments (LTI)

Smart mobility is in high gear. Regulatory changes, consumer preferences, and technological advances will likely lead to even greater electrification of cars, autonomous driving, and new car-sharing concepts. We expect substantial growth in smart mobility during this decade, as it revolutionizes both the car industry and the way we use automobiles.

### Projections and opportunities

#### Electrification

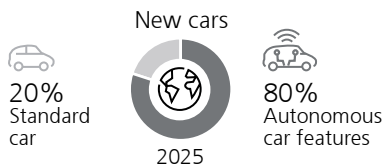
At least 25% of new vehicles sold globally are estimated to be electrified by 2025, with at least 15% being battery electric.



Source: UBS, 2022

#### Autonomous driving

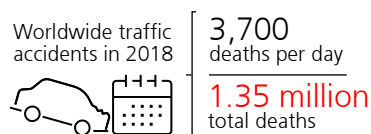
By 2025, around 80% of all new cars could be equipped with some kind of basic autonomous, highly lucrative equipment.



Source: UBS, 2021

#### Safety concerns necessitate smarter transport

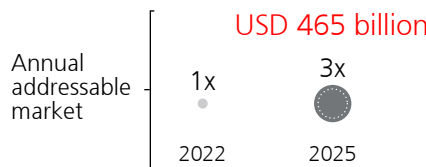
In 2018, more than 1.35 million people died from traffic accidents worldwide—more than 3,700 per day.



Source: World Health Organization, 2018 data

#### Smart mobility

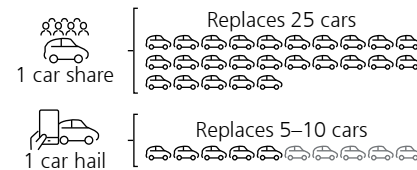
By 2025, the annual addressable market of our theme is estimated to be around USD 465 billion, or 3 times today's size.



Source: UBS, 2022

#### Car sharing, car hailing

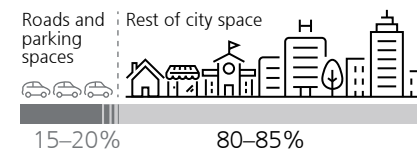
One car sharing could replace up to 25 private cars, and car hailing an estimated 5–10 cars.



Source: UBS, 2021

#### Parking spaces

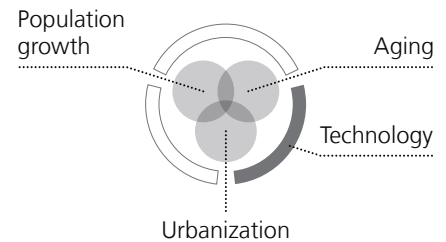
Roads and parking spaces use up 15–20% of city space. Car sharing should reduce parking and road space needed.



Source: UBS, 2021



#### Smart mobility investment properties



○ Influencer    ⊗ Key drivers

#### Near-term drivers

- Electrification
- Autonomous driving
- Car-sharing/car-hailing

#### Sustainable investing

- SDG 3: Good health and well-being
- SDG 11: Sustainable cities and communities
- SDG 13: Climate action

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