



Observations from Vancouver

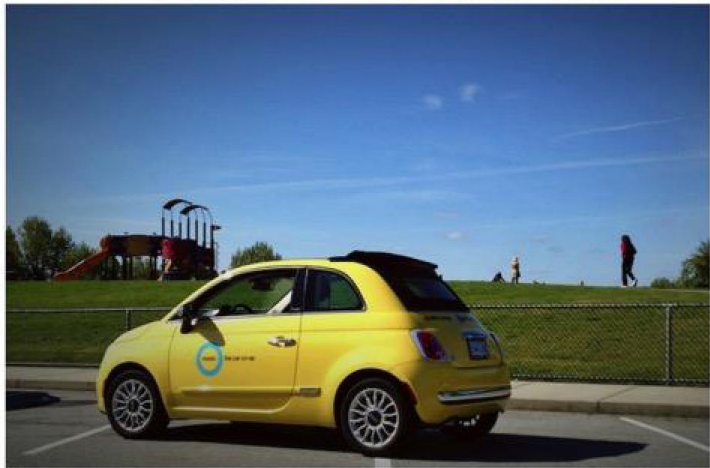
May 18, 2017

About Modo

- A member-owned co-operative based in Vancouver, BC
- Celebrated our 20th anniversary in January 2017
- 17,000+ members and 700+ businesses sharing 500+ diverse vehicles
- Present in 14 municipalities throughout Metro Vancouver, Greater Victoria and Nanaimo
- Carsharing and Fleet Sharing provider for the Cities of Vancouver, Richmond and Surrey, with 1,300+ municipal employees enrolled
- Carsharing software provider to a dozen operators in Canada and USA – by an operator, for operators

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Modo by the Numbers

	FY16 Δ
	YOY
Total members	19.3%
Business accounts	18.4%
Effective vehicle count	18.3%
Bookings	14.6%
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Kms travelled	26.3%

Observations

- We are seeing rampant business model experimentation in our industry today
- New variants/entrants target varying needs and create more reasons for people not to need to own a car
- In Vancouver, with 4 carsharing service providers and more than 3,000 shared vehicles on the street, we are seeing a rising carsharing tide that is lifting all boats
 - Increased awareness and visibility
 - Collectively educating the public
- At 20 years old, Modo is growing faster than ever

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Observations

- Our real, collective competition is the privately owned and operated vehicle
 - New vehicle sales in Canada hit record levels in 2016, for the fourth consecutive year
 - There are 1.6 million privately owned, light duty vehicles in Metro Vancouver and more are coming
- A long way to go before we can declare victory
- If you're not already working to experiment and evolve your **business model**, you'd better get started
- Critical to maintain close relationships with municipalities, transit operators, developers and academics

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Challenges

- Accelerating deployment of EV's in the fleet
- Financing growth generally
- Selecting the optimal carsharing adjacencies

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Thank you