



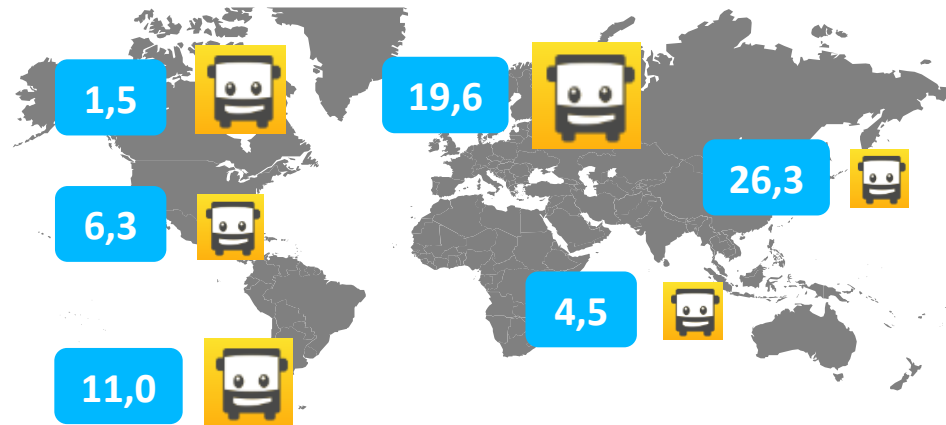
CheckMyBus

**Make bus mobility simple
- for a better life**

A global view

Global Intercity Bus

Total market: 70 bn €



Intercity bus market in billion € ticket volume / Presence of CheckMyBus

Still 90% offline!

+3 Million daily departures available
1 click

Airport (bus) shuttles

> 3,5 billion transits from/to airports per year

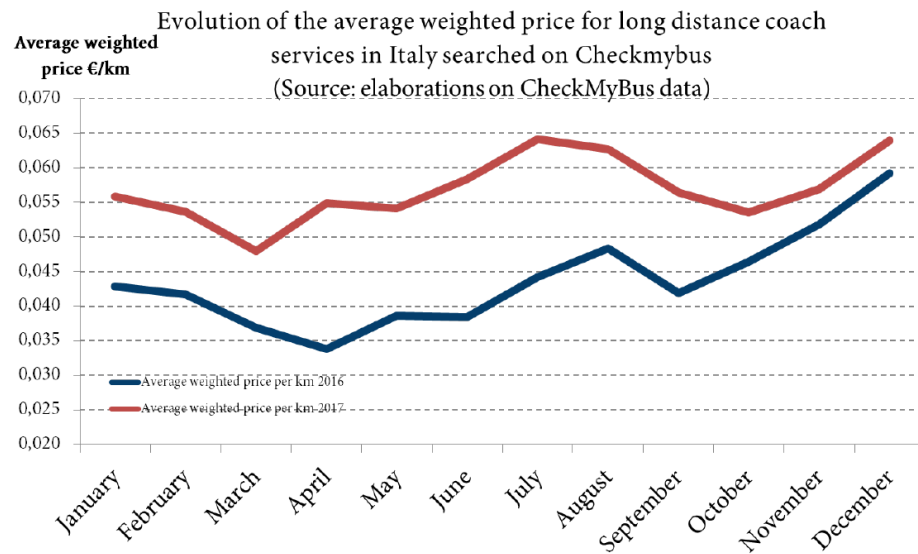


Only expensive limousines are digitalized – no offer for bus

+200 Airports connected by bus
1 click

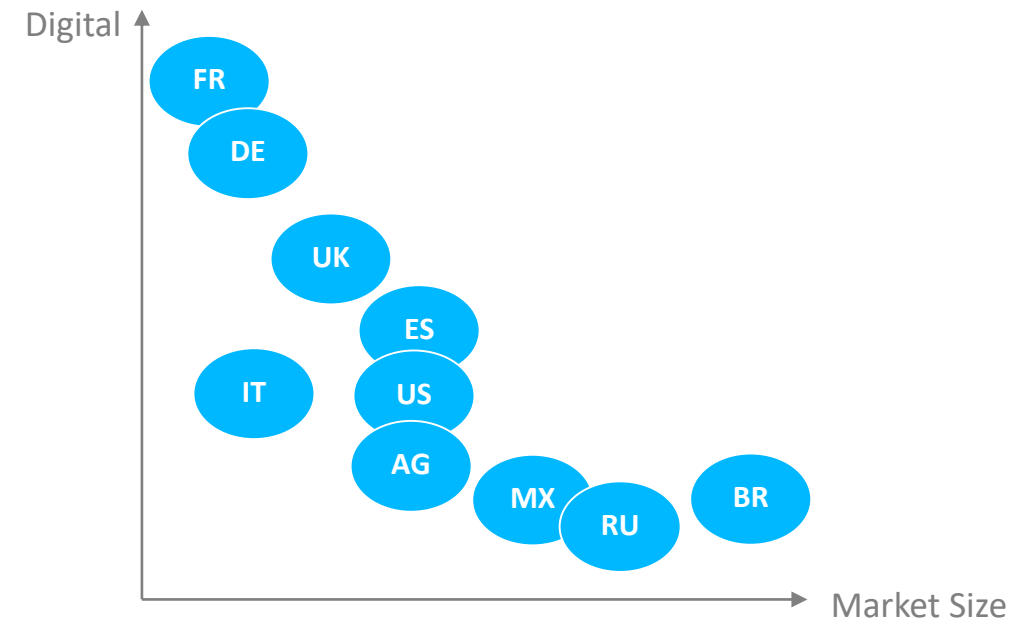
Let's have a look on Italy

Good news in Italy!



For operators: prices +20% to reasonable level
For users: more offer at reasonable price

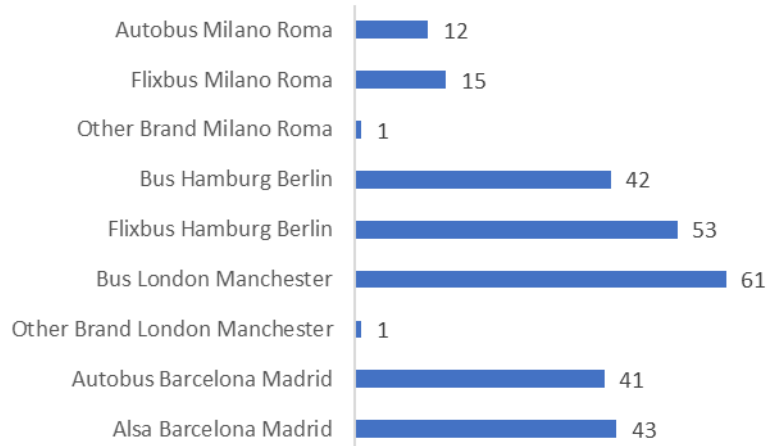
Good news in Italy?



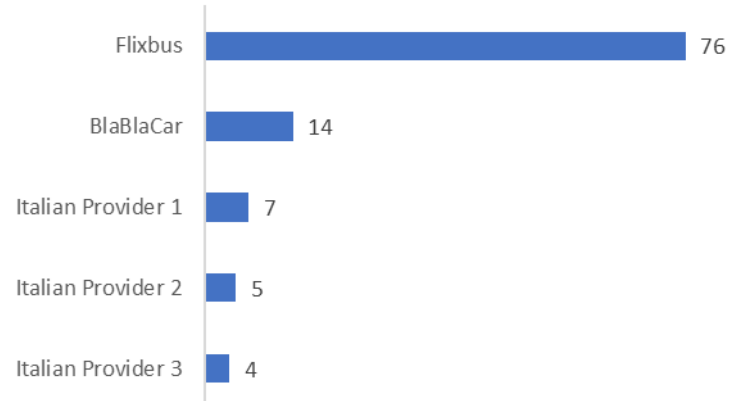
Growth potential in passengers and digitalization

Benchmark: Search behaviour, brand strength and conversion

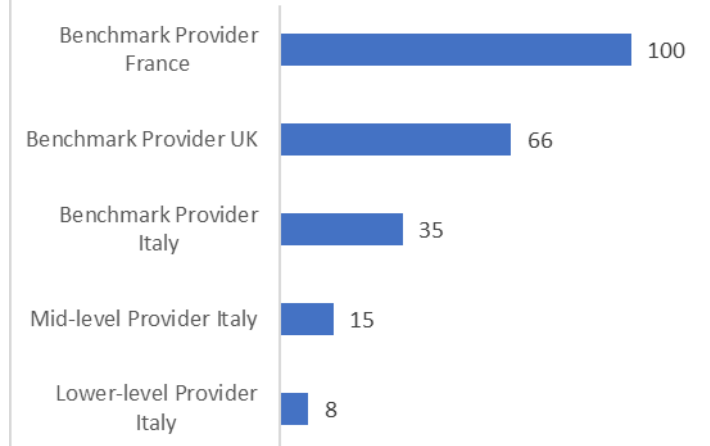
Searches for Bus routes - Index



Brand Searches in Google (Italy) - Index



Ticket sold per user sent - Index













- Lower online search penetration in Italy
- Potential for providers to strengthen brand
- Huge potential in improving customer journey !!

“Bus travel is taking off”

Eye for Travel – June 2018

We will be forced to change mobility!



RANK BY FILTER ^	WORLD RANK ^	CITY	COUNTRY	CONGESTION LEVEL	MORNING PEAK	EVENING PEAK
1	●	<u>Palermo</u>	 Italy	● 43% ↑2%	61%	69%
2	● 27	<u>Rome</u>	 Italy	● 40% ↑2%	74%	68%
3	●	<u>Messina</u>	 Italy	● 39% ↑4%	57%	56%
4	● 59	<u>Naples</u>	 Italy	● 33% ↑2%	47%	59%
5	●	<u>Reggio di Calabria</u> NEW	 Italy	● 31% -0%	37%	48%
6	● 72	<u>Milan</u>	 Italy	● 30% ↑1%	61%	54%
7	●	<u>Catania</u>	 Italy	● 29% ↑3%	42%	46%
8	●	<u>Taranto</u> NEW	 Italy	● 28% ↑5%	36%	41%
9	●	<u>Bari</u>	 Italy	● 27% ↑2%	38%	43%
10	●	<u>Florence</u>	 Italy	● 26% ↑3%	44%	46%

Now, Mobility CAN and will change!



All tools are there - for a revolution in bus

Now

- Networks not dynamic
- Large vessels at high infrastructure costs
- High costs of maintaining staff
- Never at the right time and place
- “Full” coverage is impossible
- Too expensive

Future

- Fully dynamic networks (demand driven)
- Small autonomous vessels (no sharing economy)
- Capacity is flexible (no staff)
- Anywhere at any time
- Can connect to high speed network
- Cheap cost per mile

Partly replace cars

Change distribution?

What will be the steps of change – and how to react?



Challenges & possible Answers

Today

2022+

Control user
Convert user

Yield
Management

Intermodal
Interfaces

Data driven bus
networks

Multichannel
distribution

Brand

Data over logistics

Bus is in full transformation

Drive IT!

Marc Hofmann
CEO CheckMyBus

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