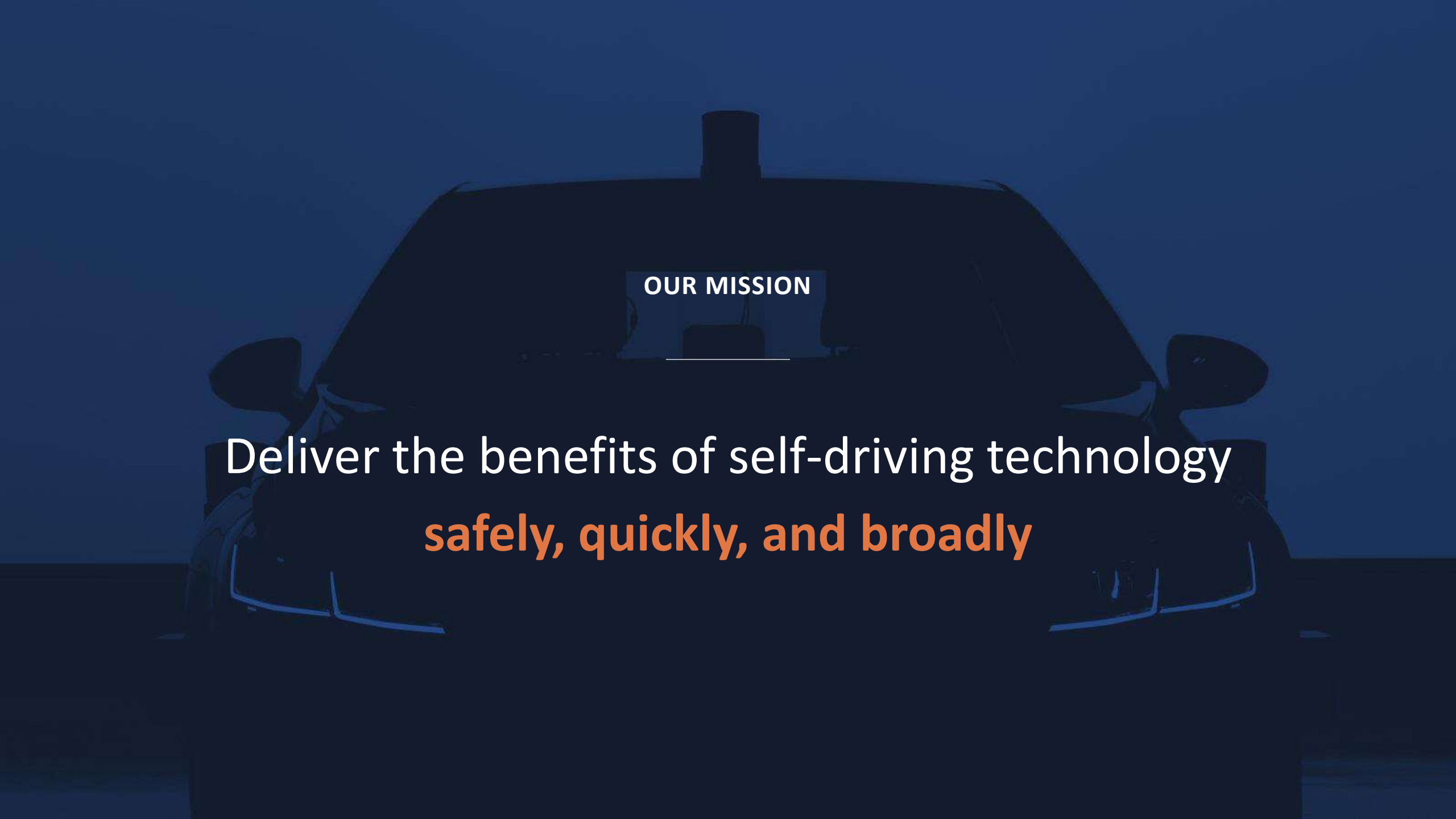
New Mobility

Ushering in the Next Era in Transportation

Sterling Anderson

Co-founder & Chief Product Officer, Aurora



OUR MISSION

Deliver the benefits of self-driving technology

safely, quickly, and broadly

< 3,000 Miles

average annual mobility in U.S.

1900

< 3,000 Miles

average annual mobility in U.S.

1900

Model T Production

low-cost personal mobility

1908

< 3,000 Miles

average annual mobility in U.S.

1900

Model T Production

low-cost personal mobility

1908

> 13,000 Miles

driven per year within U.S.

TODAY

The Cost of Human-Driven Automobiles

~1.3 million

fatalities/year

20-50 million

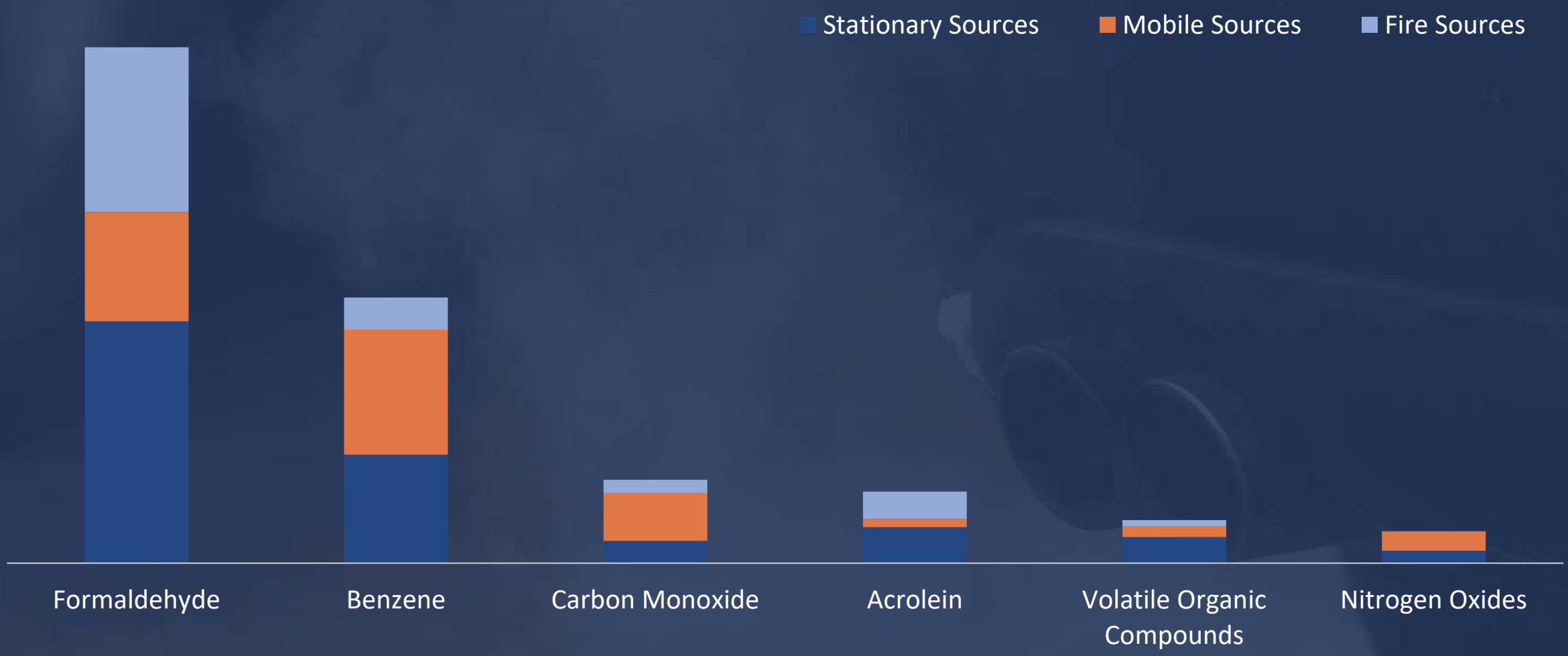
injuries/year

>$500 billion

economic cost / year

Impact on Our Cities

AIR POLLUTION



Impact on Our Cities

CONGESTION

~80 hours

average annual time lost to congestion in Dubai

Source: INRIX 2018 Global Traffic Scorecard

Impact on Our Cities

URBAN DESIGN

>90%

daily average idle time per vehicle

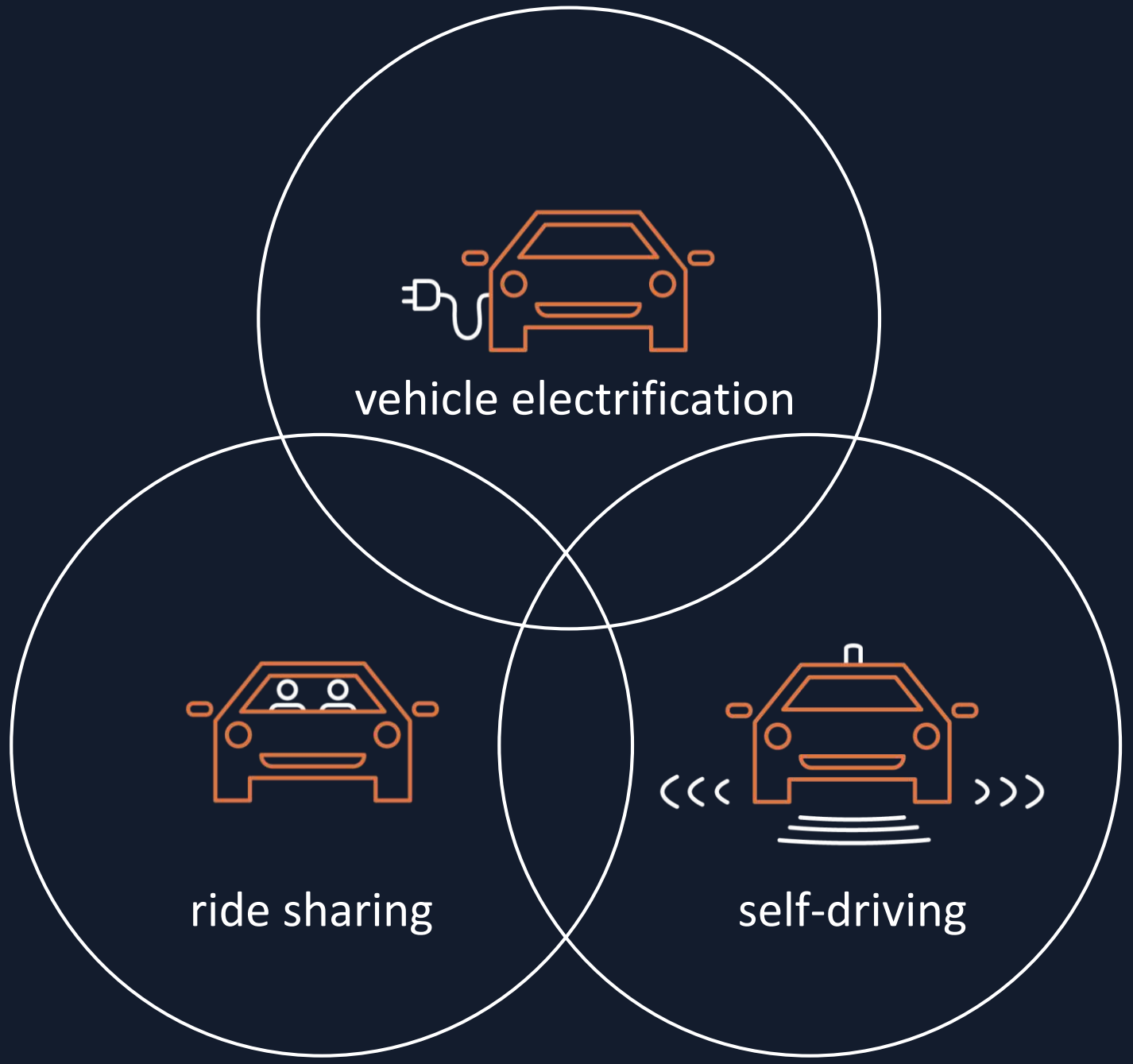
3,590 sq. miles

U.S. land area covered in parking lots to accommodate unproductive vehicles

Access

~1 billion

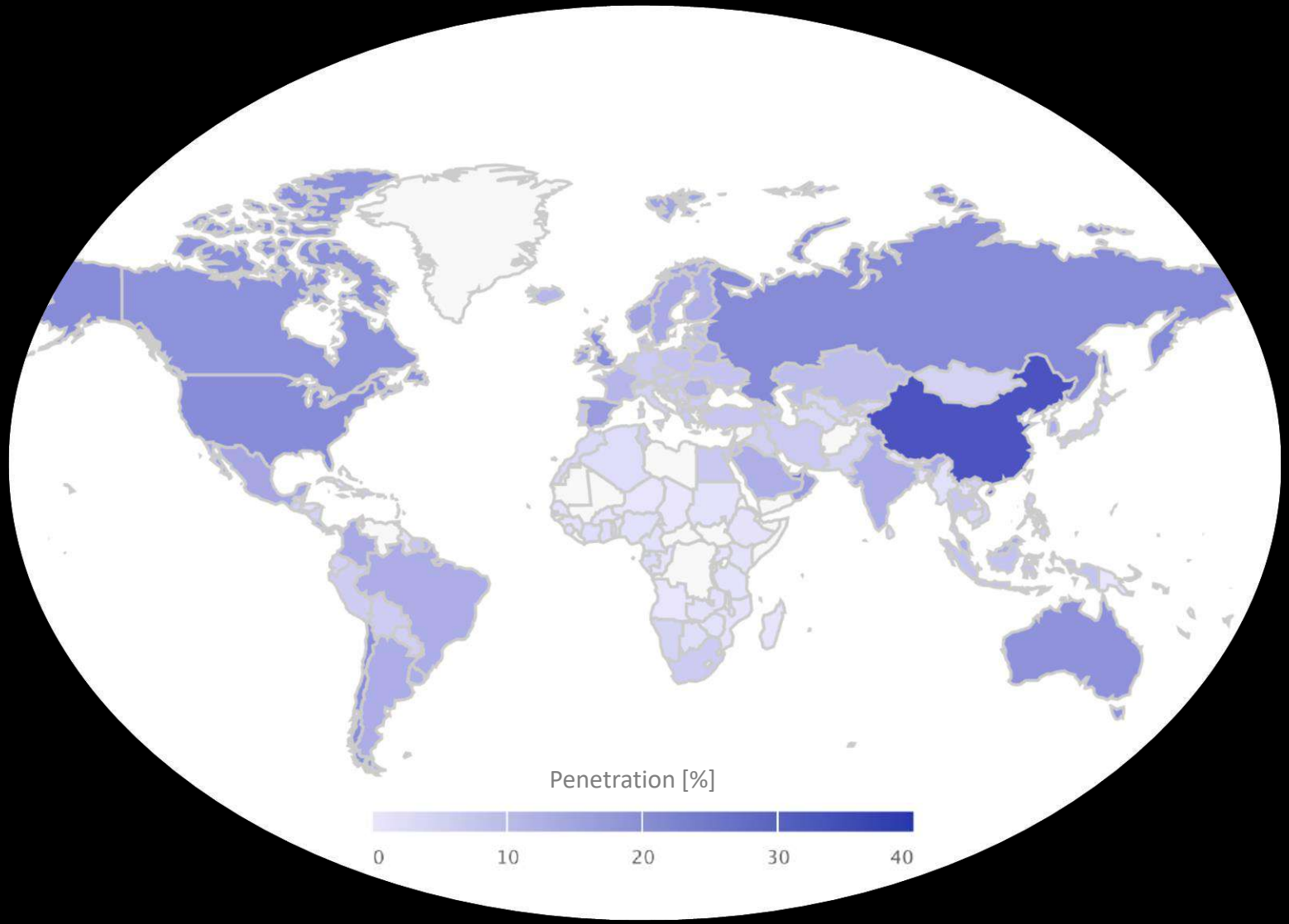
people living with disabilities globally



Vehicle electrification

Ride Sharing

Ride Sharing Growth

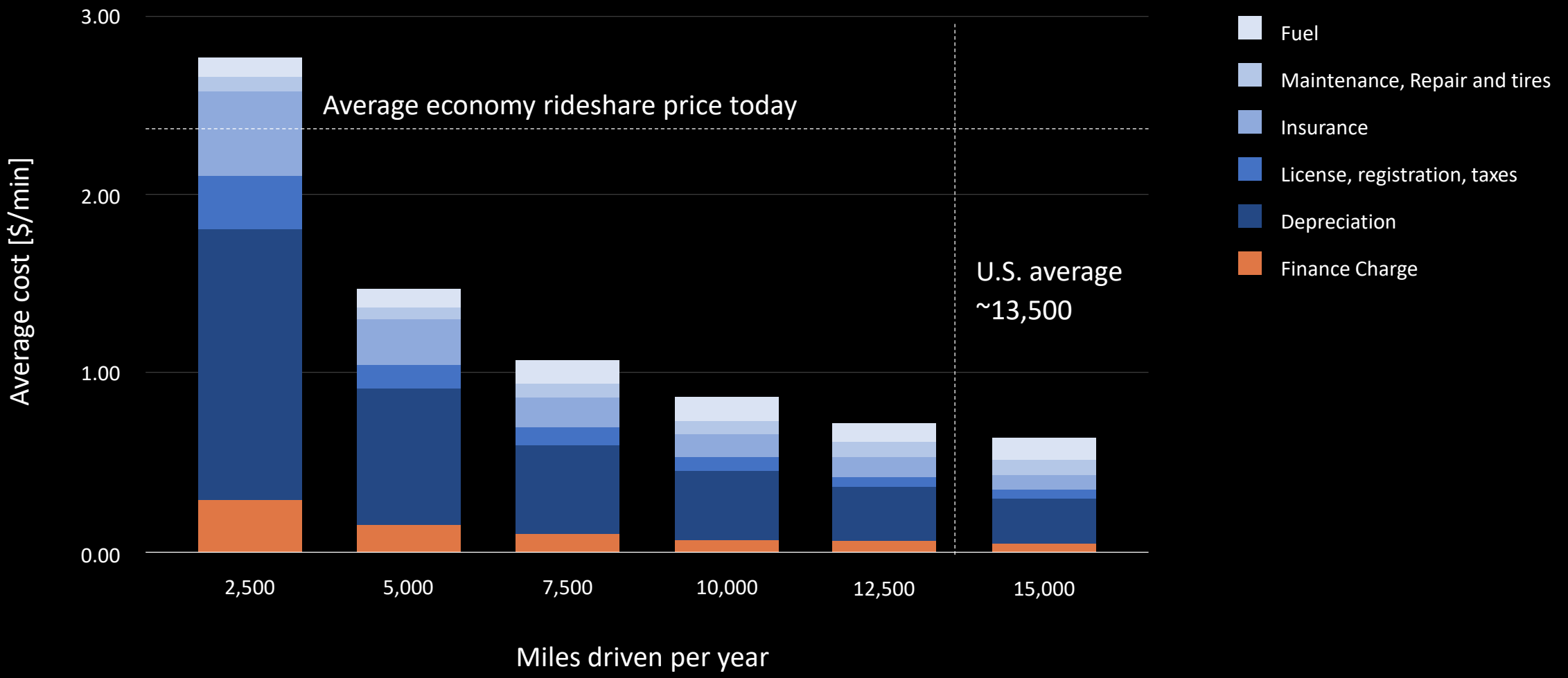


~1B annual users

>$180M annual revenue

~20% estimated CAGR

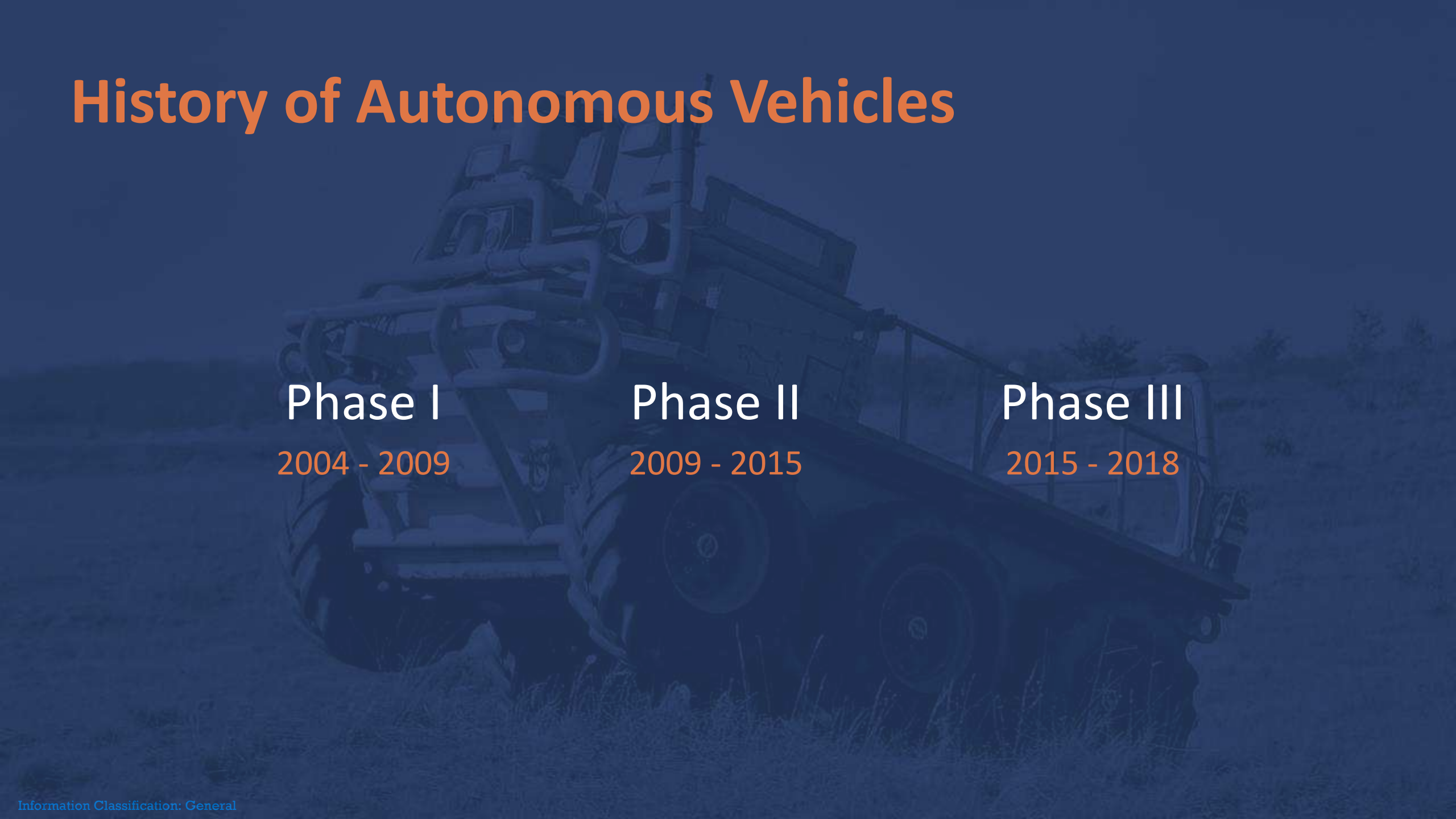
Where We're Going | Ride Sharing



Source: AAA, Your Driving Costs (2017), based on new Large Sedan (Chevy Impala, Ford Taurus) vs. national average cost per VPM of $.39 which includes used and smaller vehicles.

Self-driving

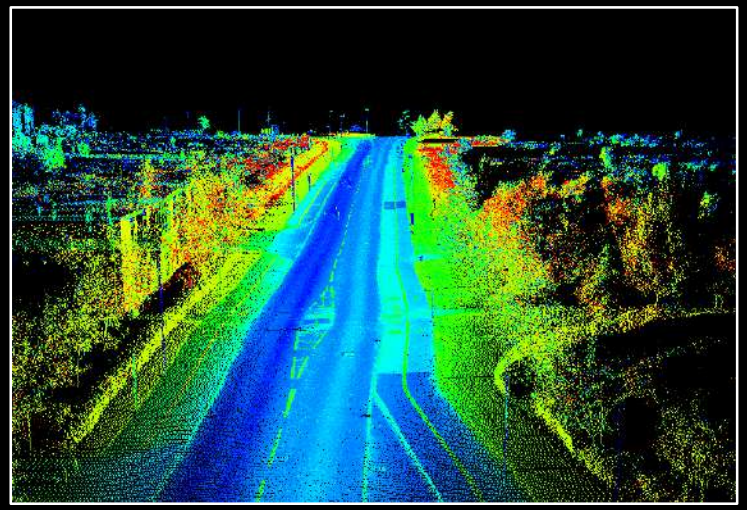
History of Autonomous Vehicles



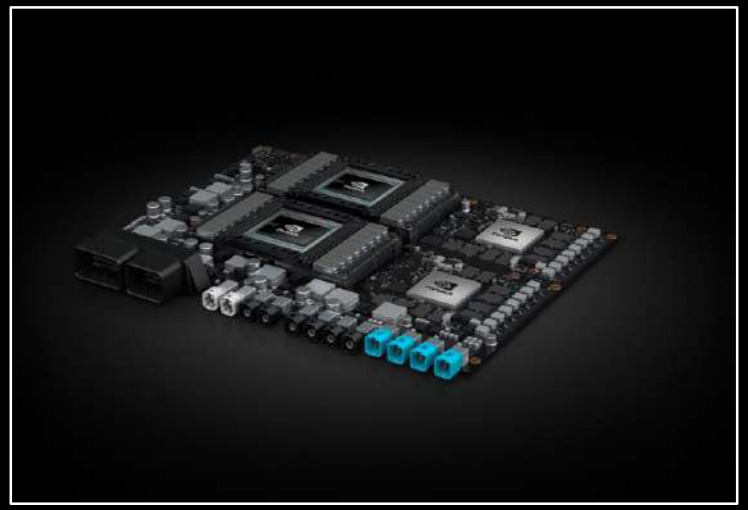
Phase I	Phase II	Phase III
2004 - 2009	2009 - 2015	2015 - 2018

Recent Technological Advances

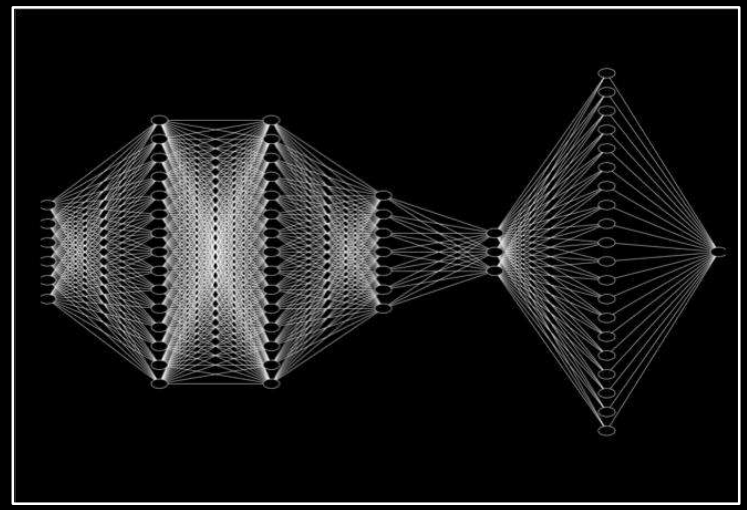
Sensing



Computation



Machine Learning



Where We are Today

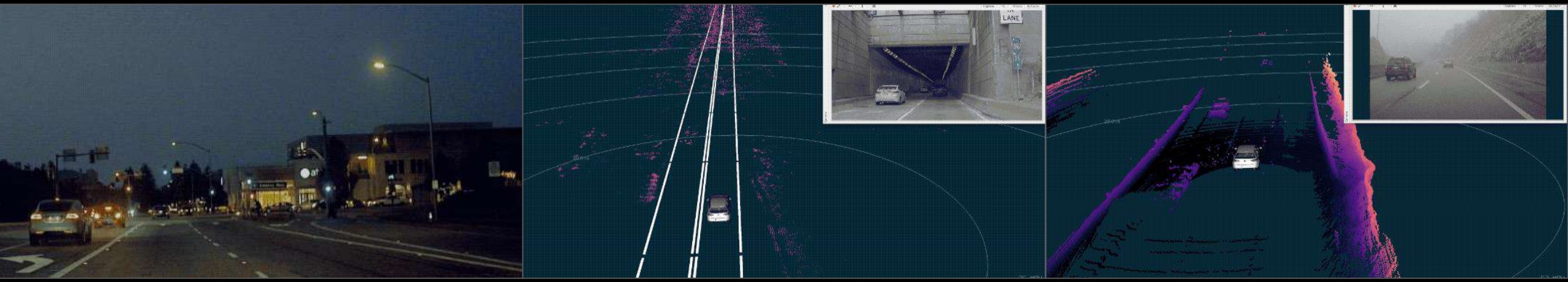
>25 Full stack self-driving development companies

>$25B In invested capital (2010-2019)

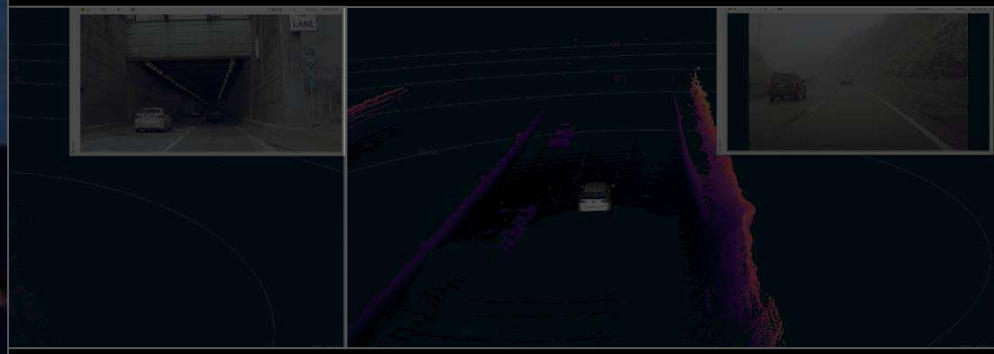
~100% Participation from major OEMs

>95 Cities with announced initiatives

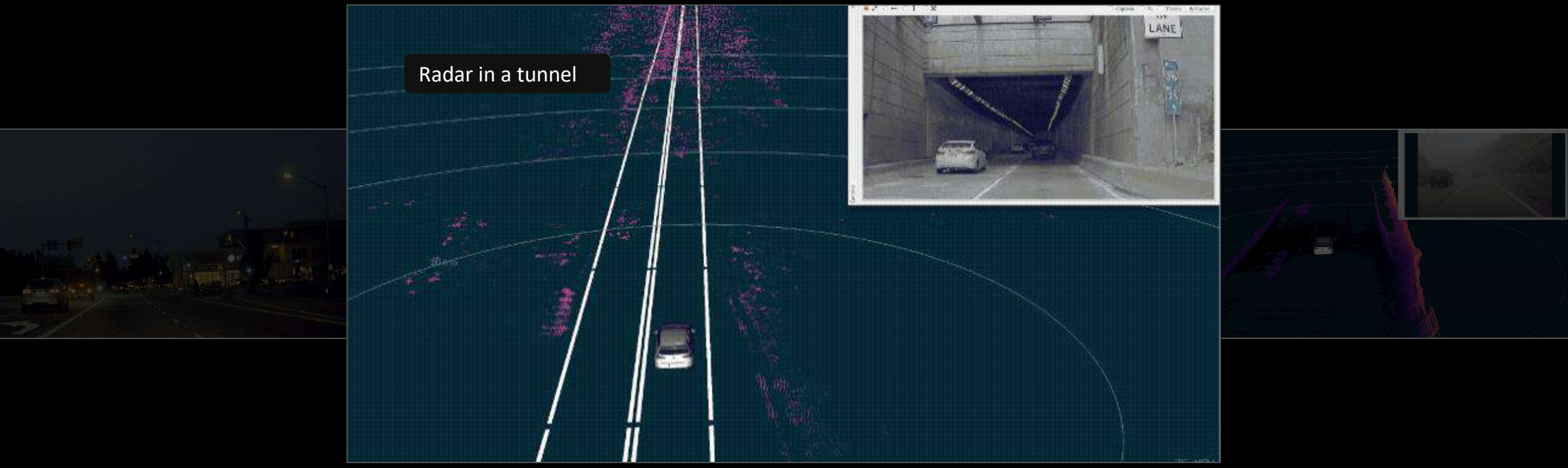
Where We're Going | Next-Gen Sensor Fusion



Where We're Going | Next-Gen Sensor Fusion



Where We're Going | Next-Gen Sensor Fusion



Where We're Going | Next-Gen Sensor Fusion

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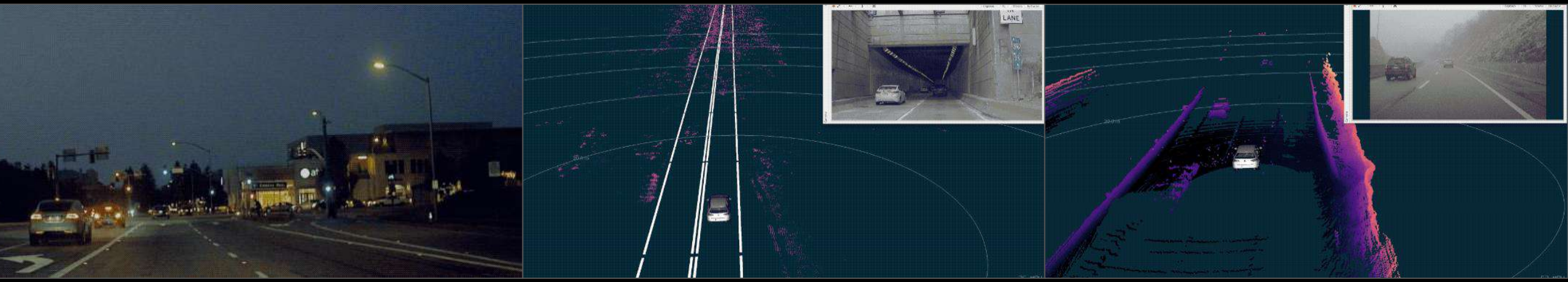
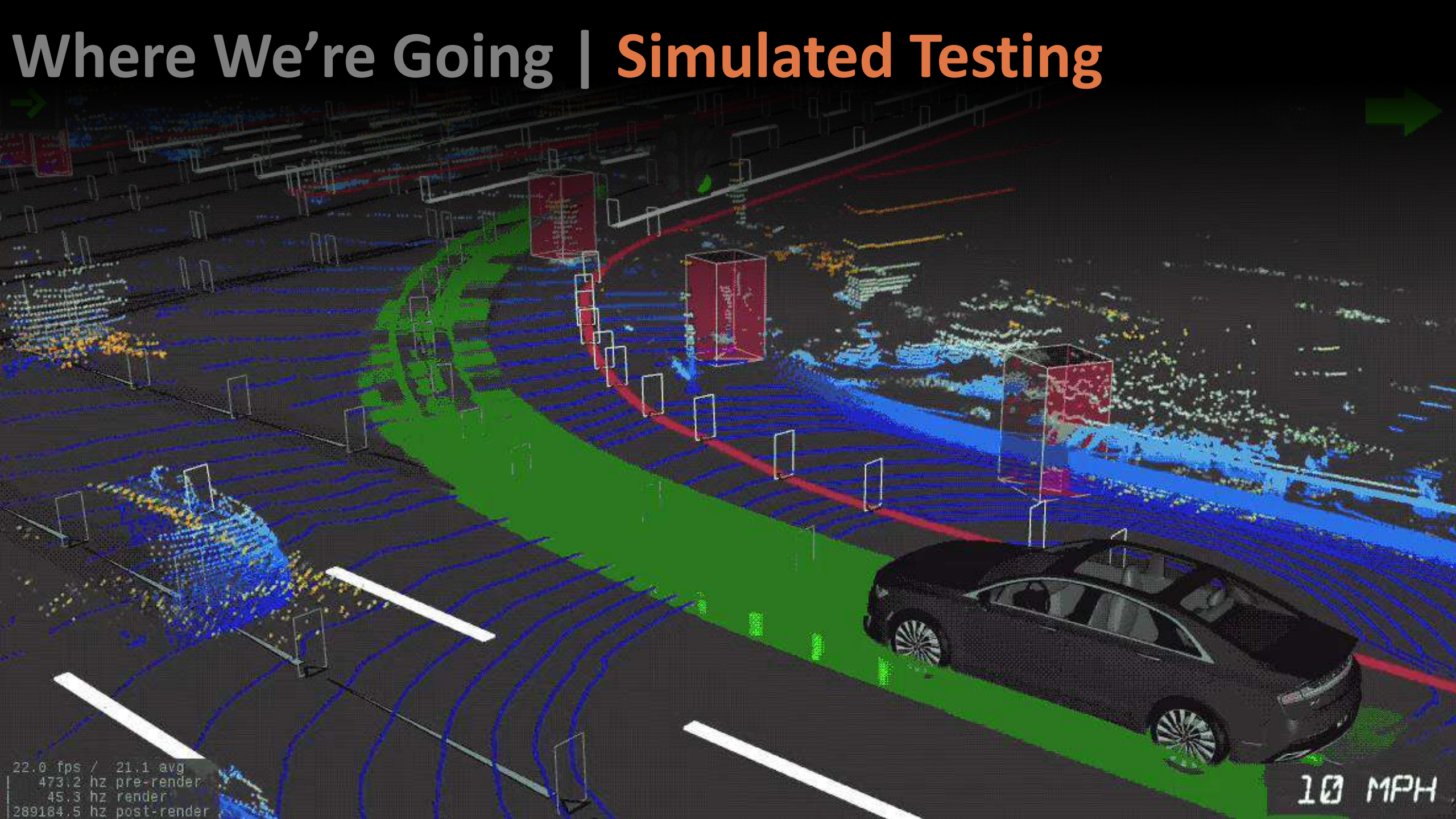


Where We're Going | Next-Gen Lidar

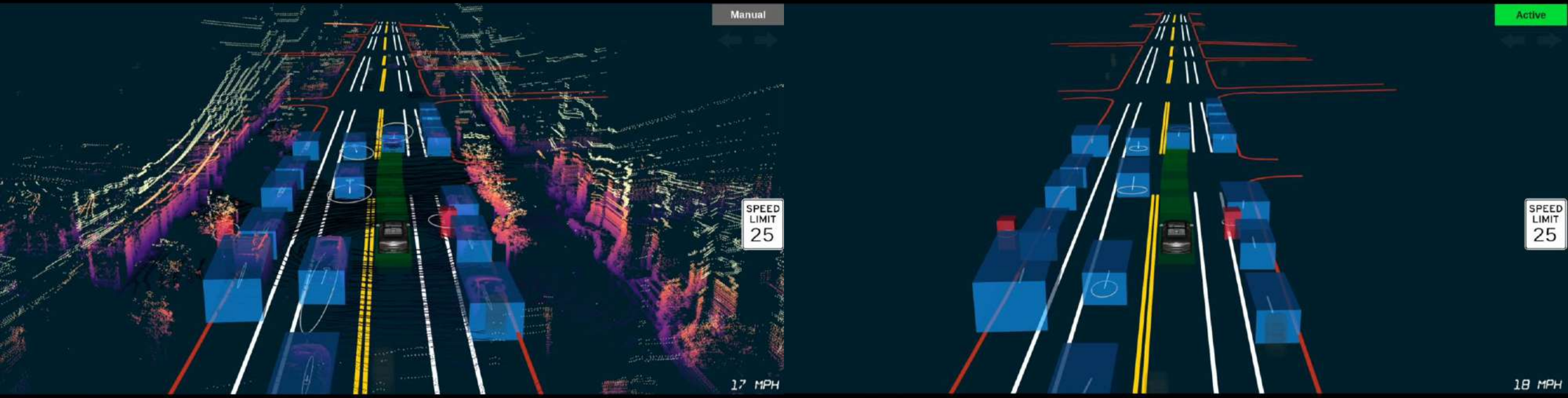
Where We're Going | Next-Gen Radar

Where We're Going | Next-Gen Computing

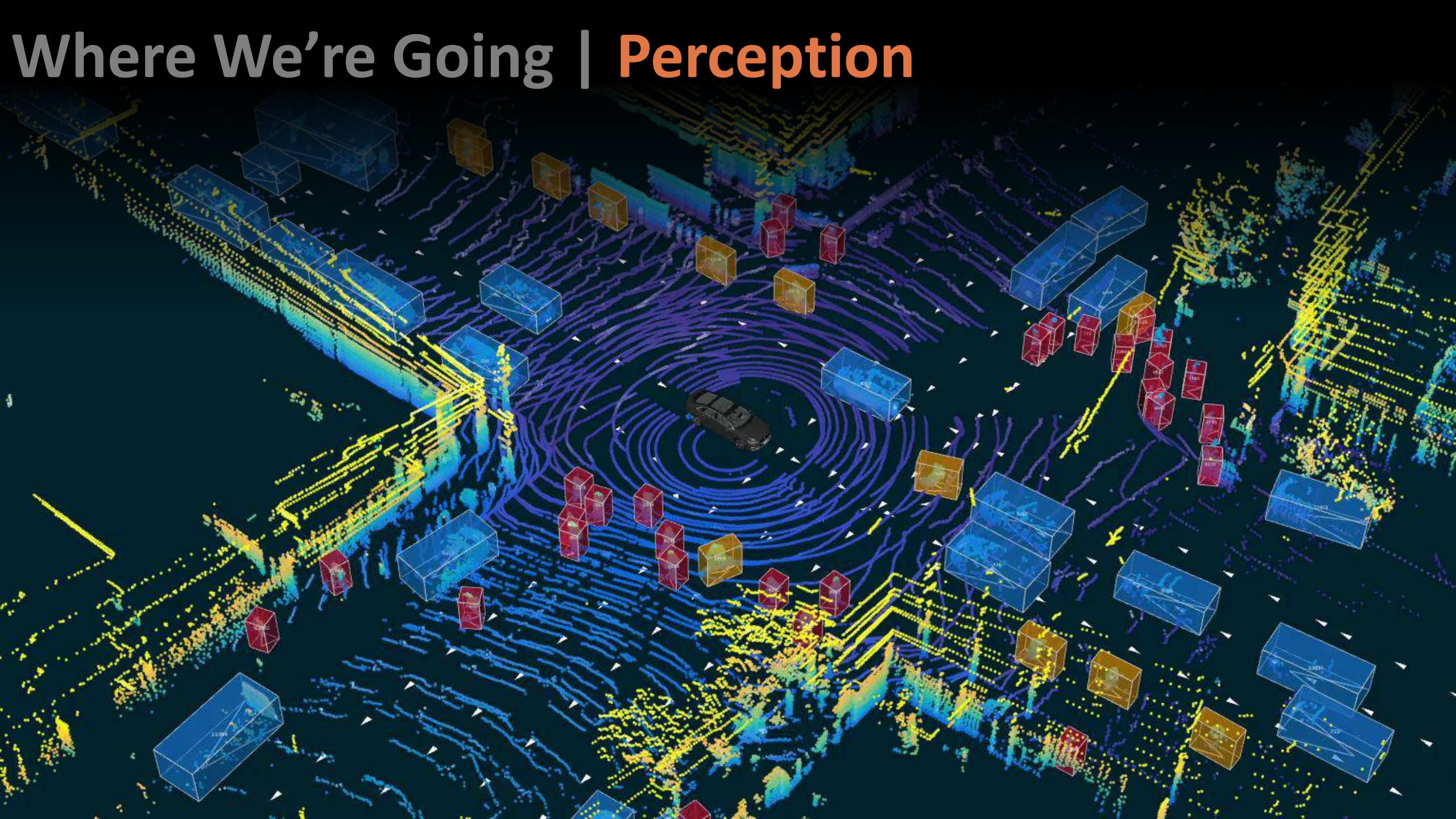
Where We're Going | Simulated Testing



Where We're Going | Virtual Development

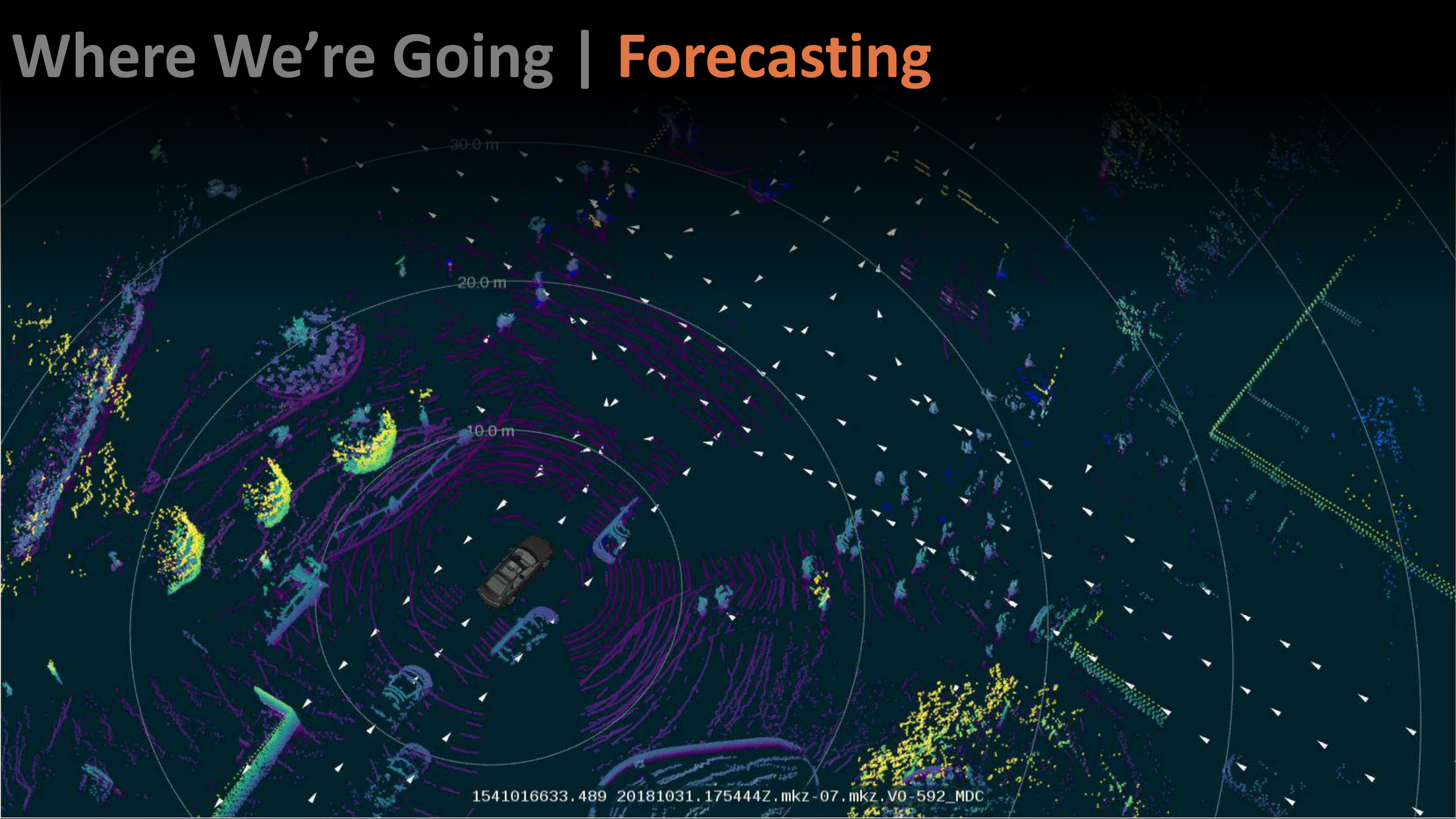


Where We're Going | Perception

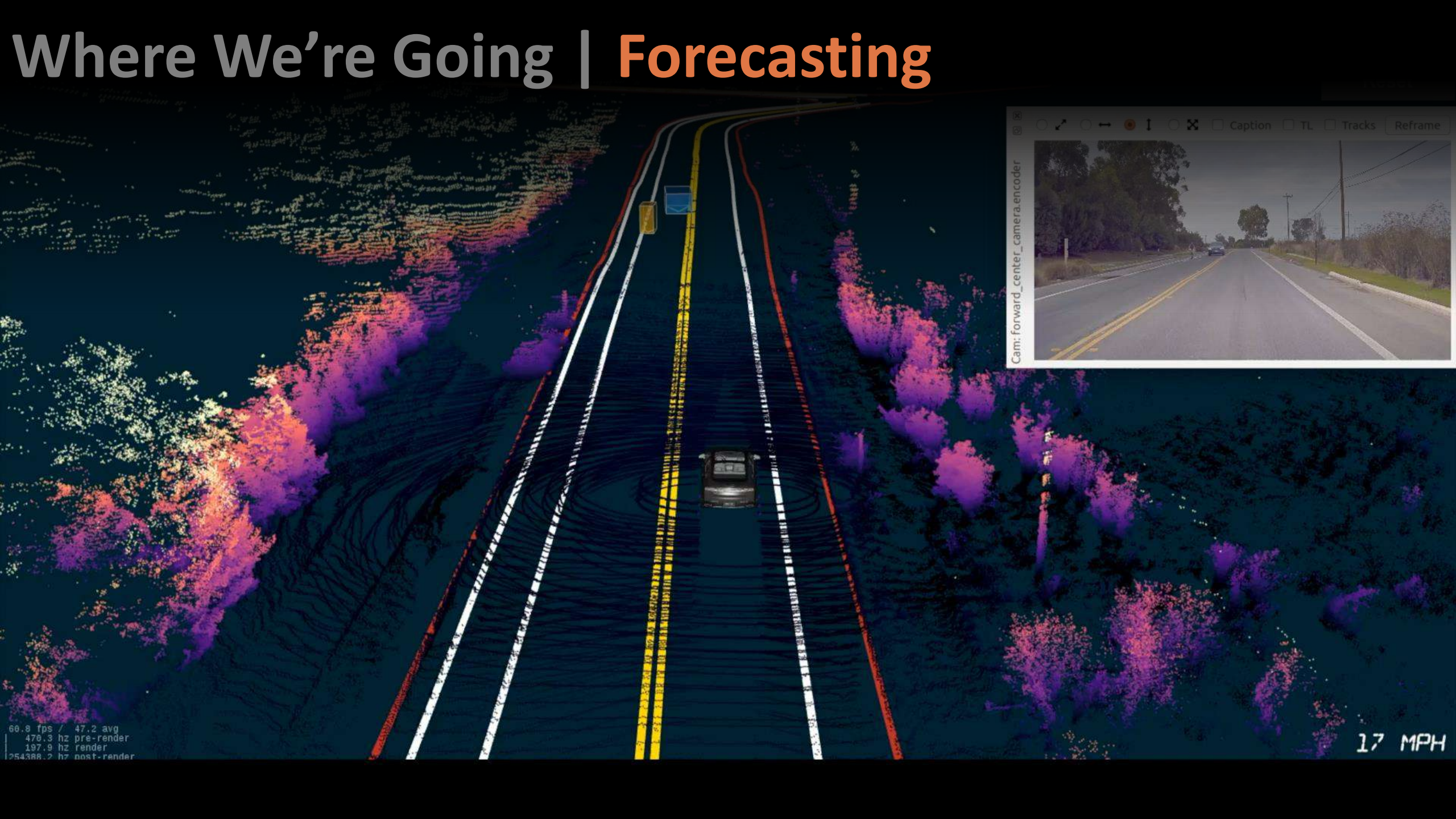


Where We're Going | Perception

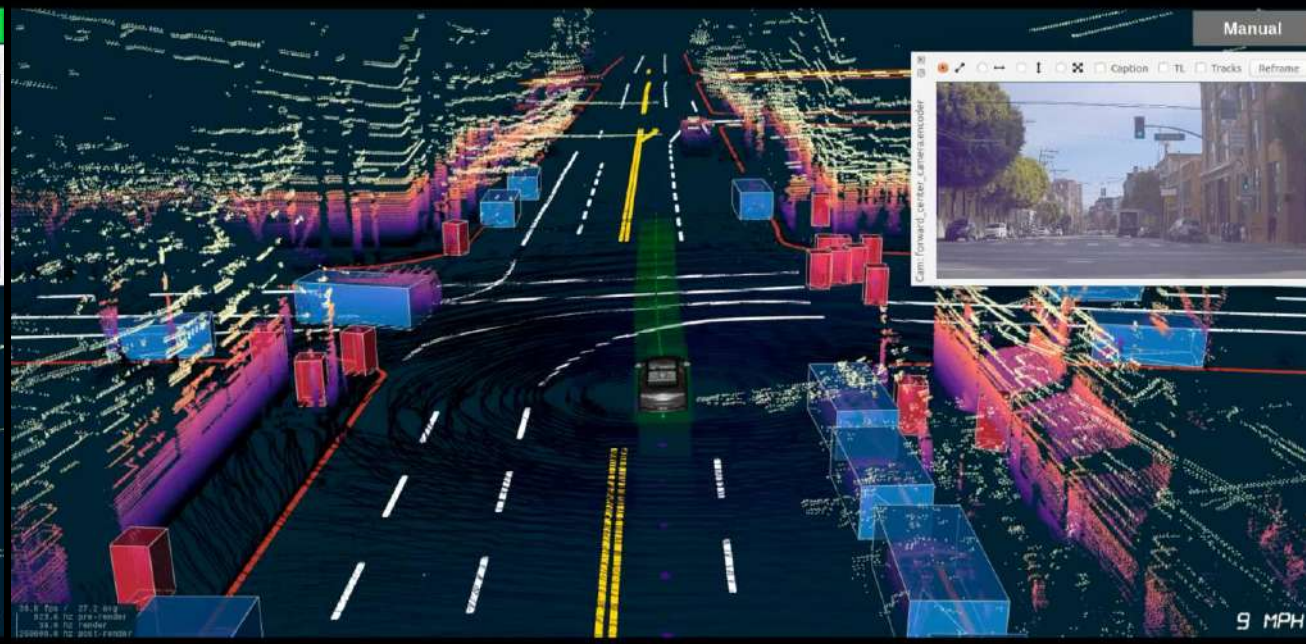
Where We're Going | Forecasting



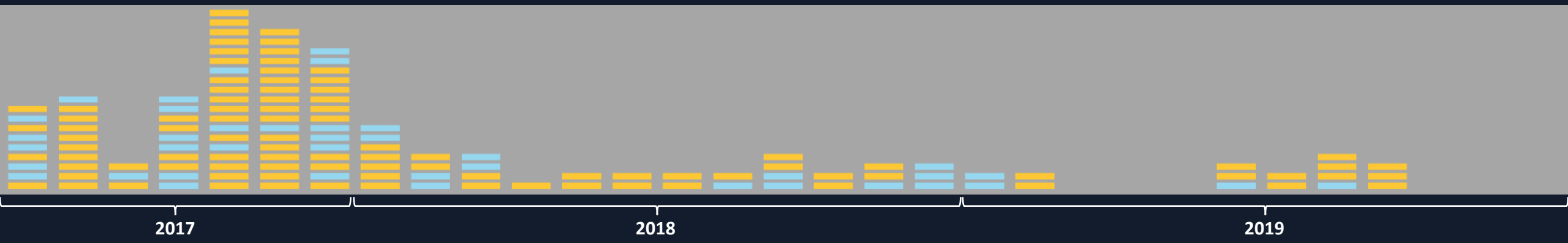
Where We're Going | Forecasting



Where We're Going | Decision Making



Where We're Going | Regulatory Progress



millions of lives
saved

tons of pollution
eliminated

thousands of square miles
liberated

billions of hours
freed

millions of people
mobilized