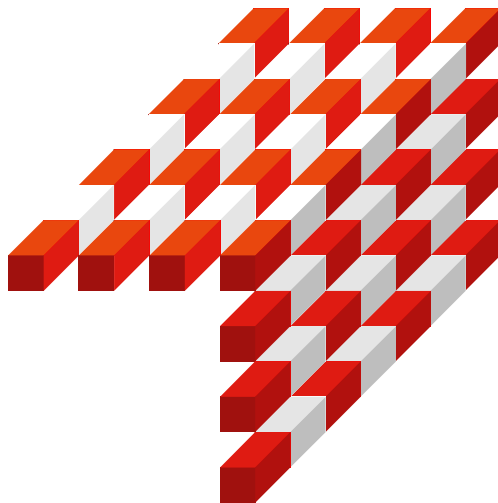


Capturing the megatrends



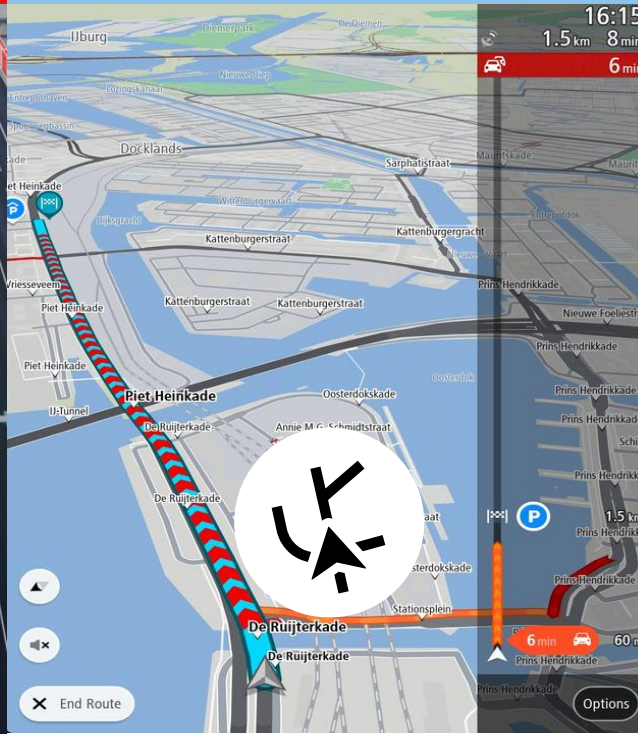
Antoine Saucier
MD Automotive

TomTom Automotive product portfolio

Maps



Software



Services



Automotive revenue driven by innovation

TomTom Automotive operational revenue including highlights of Start of Production from key contracts



Launch of Renault Carminat TomTom



First with traffic for connected navigation



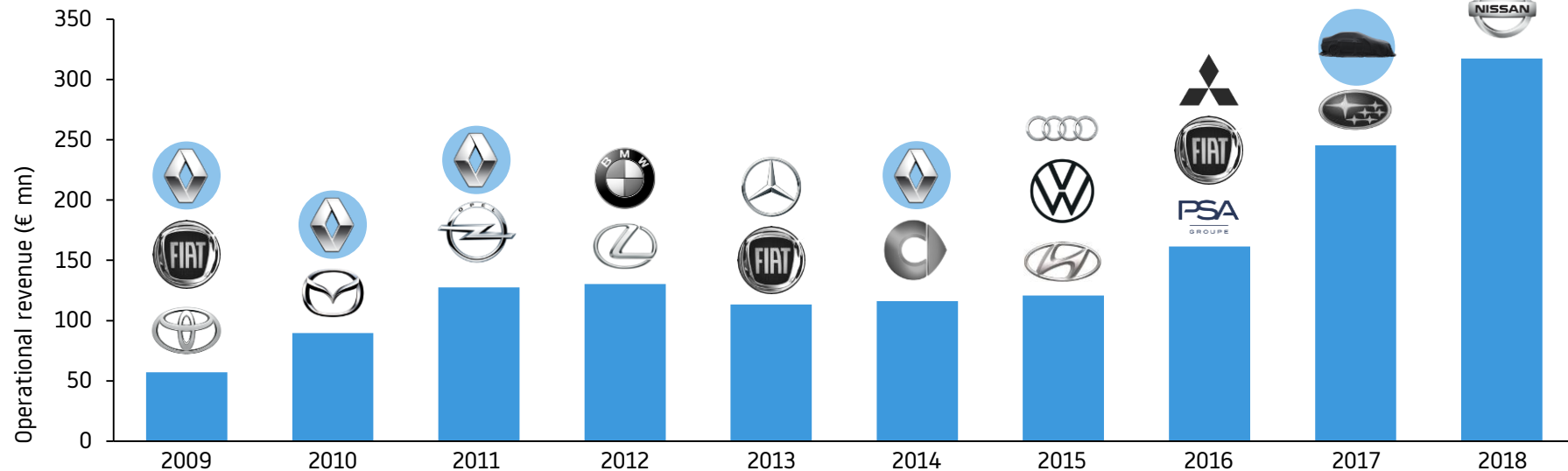
First EV Navigation on Renault Fluence & Zoe



Launch of ADAS Map in first L2 autopilot



Launch of IQ Maps on MG Hector in 2019



Software, maps and services

Key automotive megatrends providing further opportunities

Connected

- Software & map updates
- Sharing sensor data
- Monetizing new services



Automated

- ADAS & HD Map content
- Safety services
- Bridging navigation and AD



Shared

- Location-based services for mobility solutions
- Mobile apps and brought-in navigation



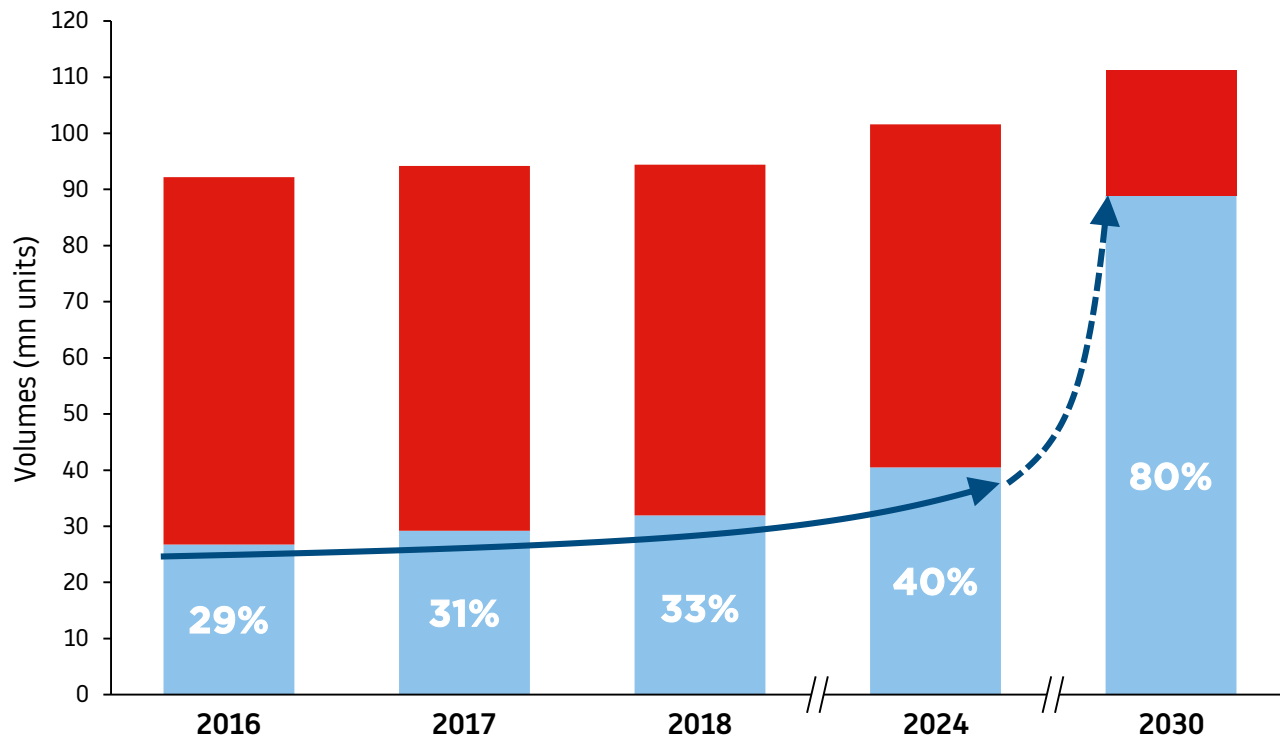
Electrified

- Electric vehicle (EV) services
- EV navigation
- EV charging transactions



CASE megatrends boost navigation take rate

Global light vehicle sales volume and take rates



Connectivity increases functionality and attractiveness of IVI



Automated vehicles need navigation for enhancing automation functions



Shared vehicles need mobility services integrated with navigation



Electric vehicles need navigation to find and reserve charge stations

Source: IHS Markit, TomTom analysis as of September 2019.

Light vehicle sales volume

Connected navigation volume

Market shift due to customer expectations

VOLVO POLESTAR 2



TESLA MODEL 3



BYTON M-BYTE



MERCEDES MBUX



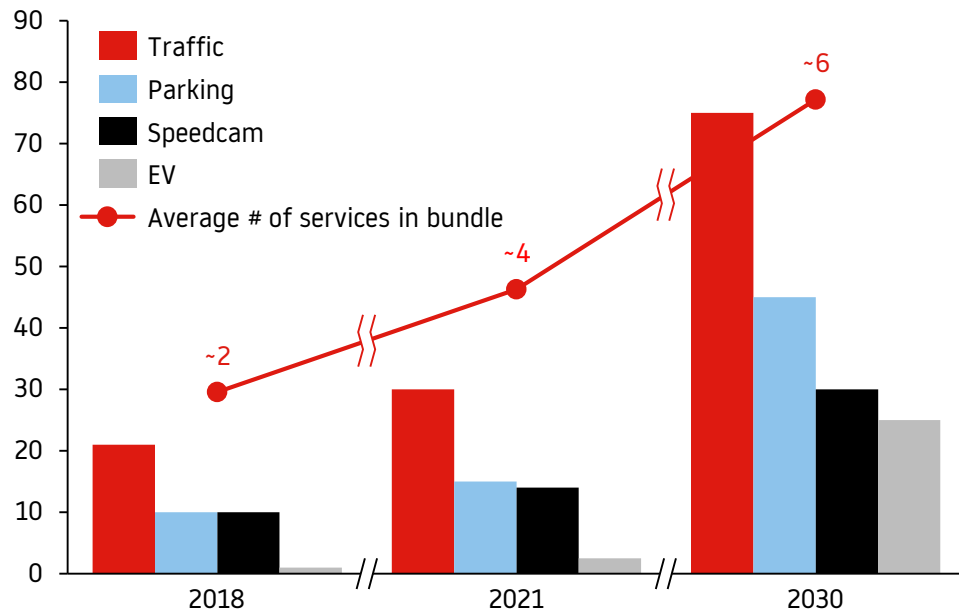


Our value proposition for carmakers and drivers

- Best-in-class connected navigation
- Safe and comfortable autonomous driving experience
- Efficiency and comfort for electric vehicle drivers
- Safely connected to the driver's digital life
- User Experience embedded in all our products

Connected services expected to grow further with TomTom leading the market

Services market size
(mn units per annum)



Source: IHS Markit, EV-volumes.com, TomTom analysis as of September 2019.



Traffic



Parking



Speedcam



EV



Hazard



Fuel



Weather



Transactions



Mobility

Safe and comfortable **autonomous driving** experience



- Supporting >1 million vehicles with ADAS Maps
- Leading the HD Map market with first deals won
- Expanding product portfolio with Safety Services
- Converging navigation and automation

Safely connected to driver's **digital life**

We have integrated our navigation experience with:

- Platform providers
- Third-party services
- Voice assistants
- In-vehicle-commerce
- Smartphone companion apps



Business update

Achieving our vision

Navigation

- Vehicle launches with Subaru, Jeep, Renault and Nissan brands
- IQ Maps global launch on MG India's Connected Car
- Preparing navigation launch for North American OEM



Connected Services

- Volkswagen Group renews TomTom Traffic deal
- Live Traffic for MG India
- Major wins with multiple top OEMs for connected services



Electric Vehicle Services

- Nissan LEAF selects TomTom EV services
- BMW selects TomTom routing & EV Range service
- TomTom EV Service for Jeep Renegade and Compass



Automated Driving

- Multiple wins with top OEMs
- Launched AutoStream
- >1 million L1 & L2 vehicles powered by TomTom ADAS Maps across 6 OEMs



Thank you

TomTom 

