Future of Mobility

Introducing the New Business Models
Revolutionising Urban Mobility

Thursday 2\textsuperscript{nd} July – Frost & Sullivan’s Intelligent Mobility Workshop

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#IntelligentMobility
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Paradigm Shift from Vehicle Ownership to Vehicle Usage

We are moving very quickly from public and private transport being separate businesses, to a more Integrated Multi Modal Mobility Network, due to changing demographics, preferences, and technology.

**Transport = Private Vehicle**
- Freedom
- Convenience
- Status
- Progress
- No Real Alternative

**Transport = Door-to-door Mobility**
- **New Vehicles**: BRT, EV, High Speed Rail
- **New Business Models**: Vehicle Sharing, Car Pooling
- **Inter-Connectivity**: Inter-modality
- **Urban Planning**: Reallocation of street space
- **Integrated Mobility**: New technology enabled multi modal integration

![Diagram showing Mobility Integration: Paradigm Shift from Vehicle Ownership to Vehicle Usage](image)
Definition & Potential of Integrated Mobility

The Future of Mobility consists of Technology enabled, door-to-door, multi-modal travel encompassing pre-trip, in-trip and post-trip services to improve journey experience to the Mobility User.
Mobility Landscape – Many Players, New Partnerships, New Models

In both B2C and B2B environments customers are demanding intuitive services; many actors investing significantly in order to deliver the ‘killer’ seamless proposition & user experience.
Carsharing Business Models

There are already several well established vehicle sharing business models catering to several customer groups and use cases, by the minute, hour or longer term corporate carsharing/leasing

**Traditional**
- Round-trip/station based services – vehicles rented & returned to same location (e.g. Zipcar)
- One-way fixed point to point journeys (e.g. Autolib)
- One Way – Free Floating services; vehicles rented from or two anywhere in a specified zone (e.g. car2go, DriveNow)

**Peer to Peer**
- Short rental/a few days
- Insurance - key to the operating model/platforms
- Key Players incl. Getaround, RelayRides, Wheelz, Buzzcar, Tamyca
- Asset Light business

**Corporate**
- Dedicated fleet of vehicles at company premises for the shared use amongst the company’s employees.
- Integrated keyless operations, vehicle telematics, and analytics technologies key
- Key Players incl. AlphaCity, Ubeeqo

...already nearly 7m people use these shared services globally
Comparative Market Positioning of Ridesharing business models

There are already >23m Rideshare members in Europe

Source: Frost & Sullivan.
Car On Demand, and Mobility on Demand – The Rise of “Asset Light”

The true disruptive forces in Mobility are taking place via platforms linking supply & demand, a marketplace phenomenon; customers now expect mobility services on demand.

Tech-enabled Mobility Services growing rapidly, due to “Asset Light” scenario, with platforms matching supply and demand to reduce spare capacity and improve the user experience.

Customers now expect on-demand solutions and are happy to use shared services.
Substitution Effects of Shared Mobility

Carsharing will not replace one specific transport mode, but will take share from all, with the largest replacement share from Ridesharing, car rental services, and driving your own car.

Findings from Frost & Sullivan’s carsharing voice of customer survey (n=2,300) showed that of those interested in carsharing:

- Highest replacement can be expected from internet ride sharing, car rental, car ownership and taxi use
Evolution of OEMs Mobility Services

Car companies are evolving from the business of manufacturing & selling just cars, to providing related services, and multi-modal mobility solutions to target new customers, and future proof their business.
Opportunity: Mobility is becoming far more connected, asset light, and integrated – Customer expectations are shifting to tech-enabled mobility

Several New Mobility business models are emerging AND evolving – Private Sector led innovation increasing user experience

Cities need to consider how to adapt and the impacts – each city is different and should evaluate the benefits & risks

Most instances of best practice have included public sector involvement – Support required to maximise potential (regulation, integration?)

Significant market opportunity: Frost & Sullivan estimates New Mobility Business Models worth >€10bn by 2020
Frost & Sullivan Mobility Research and Advisory Expertise

Frost & Sullivan’s Mobility Expertise

Mega Trends
- Urbanisation
- Social Preferences
- Connectivity & Convergence
- Infrastructure Trends
- eMobility
- Collaborative Consumption & Peer to Peer models

Car Sharing
- Unrivalled market research on each car sharing business model (e.g. traditional, peer to peer, corporate)
- Strategic insight & KPI Analysis

Solutions & Business Models
- Ride Sharing & Car Pooling
- Parking Management Systems
- Global Taxi Market
- Public Transport & Transport Operators
- Transit Technology (e.g. eticketing)
- Integrated Mobility
- Corporate Mobility; Products & Services

Product Development
- Market Opportunity Analysis based on growth, or product
- White Papers & Marketing/Investor Relations
- Business Model analysis & differentiation
- Workshops based on our research tailored to your products

Thought Leadership
- Intelligent Mobility Workshop
- Analyst Briefings & webinars
- Social Media channels (join our Future of Mobility group on LinkedIn)
Thank You & Keep in Touch!
#IntelligentMobility

Future of Mobility Video

Watch our latest Video on the Future of Mobility, filmed live at Frost & Sullivan's Annual Mobility Workshop

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Now Introducing our Panel of New Mobility Business Models…

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