



# **A view towards the horizon: The mobility landscape today and a view towards the horizon.”**

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*Taxi & Mobility Update 2018 19<sup>th</sup> April 2017*

Shwetha Surender, Industry Principal, New Mobility

## AGENDA

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### **The Future of Mobility - Trends, Services & Convergence in New Mobility Business Models**

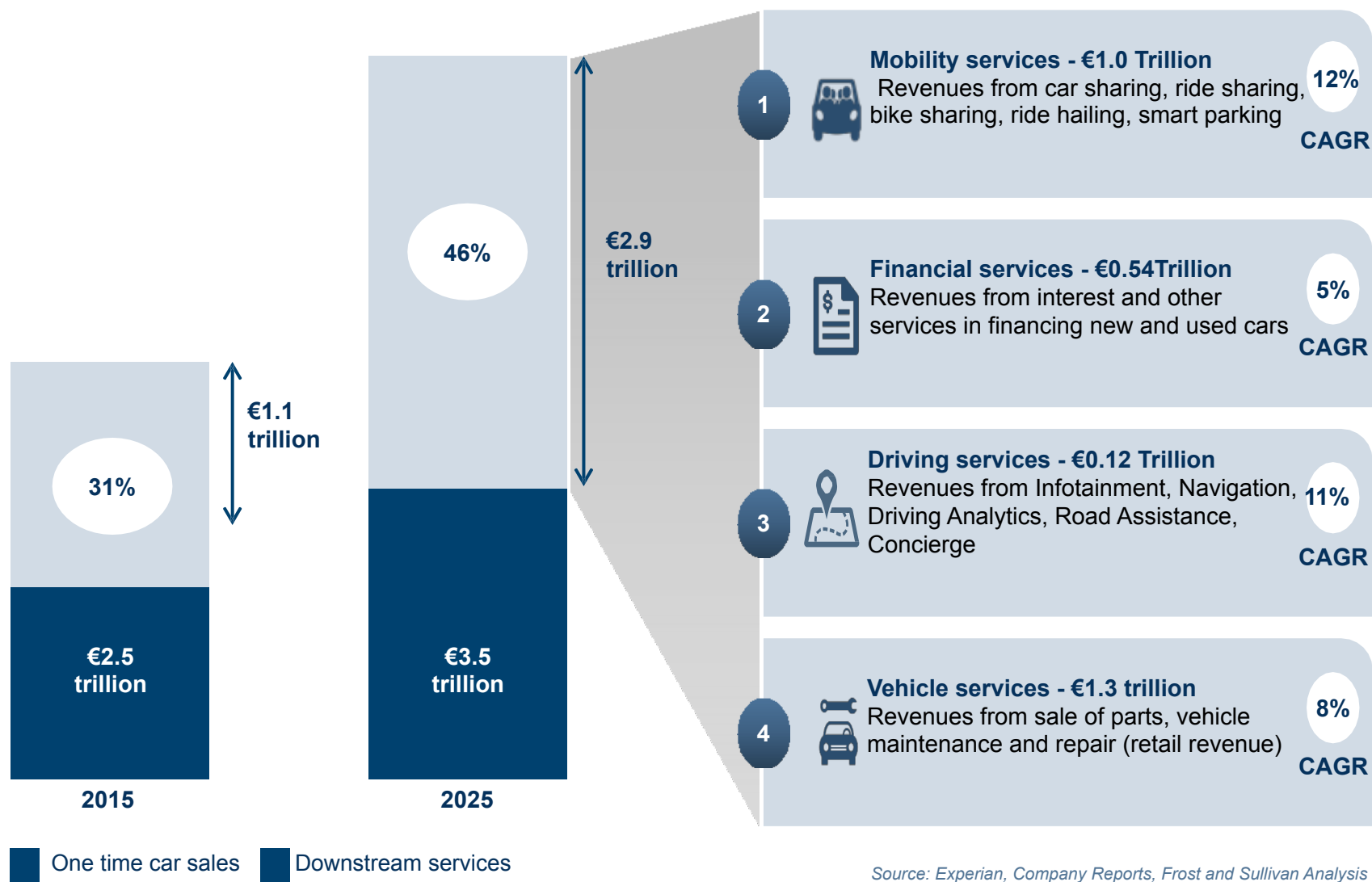
The development of New Mobility solutions - deep dive into market size, trends and future outlook

- car sharing
- car pooling/ridesharing
- e-hailing
- demand responsive transit
- integrated mobility/mobility as a service

Impact of automation on shared mobility market - CASE maturity roadmap and implications to shared mobility

# New Business Models in Mobility

Automotive revenue growth in future will come from downstream services driven by platform approach

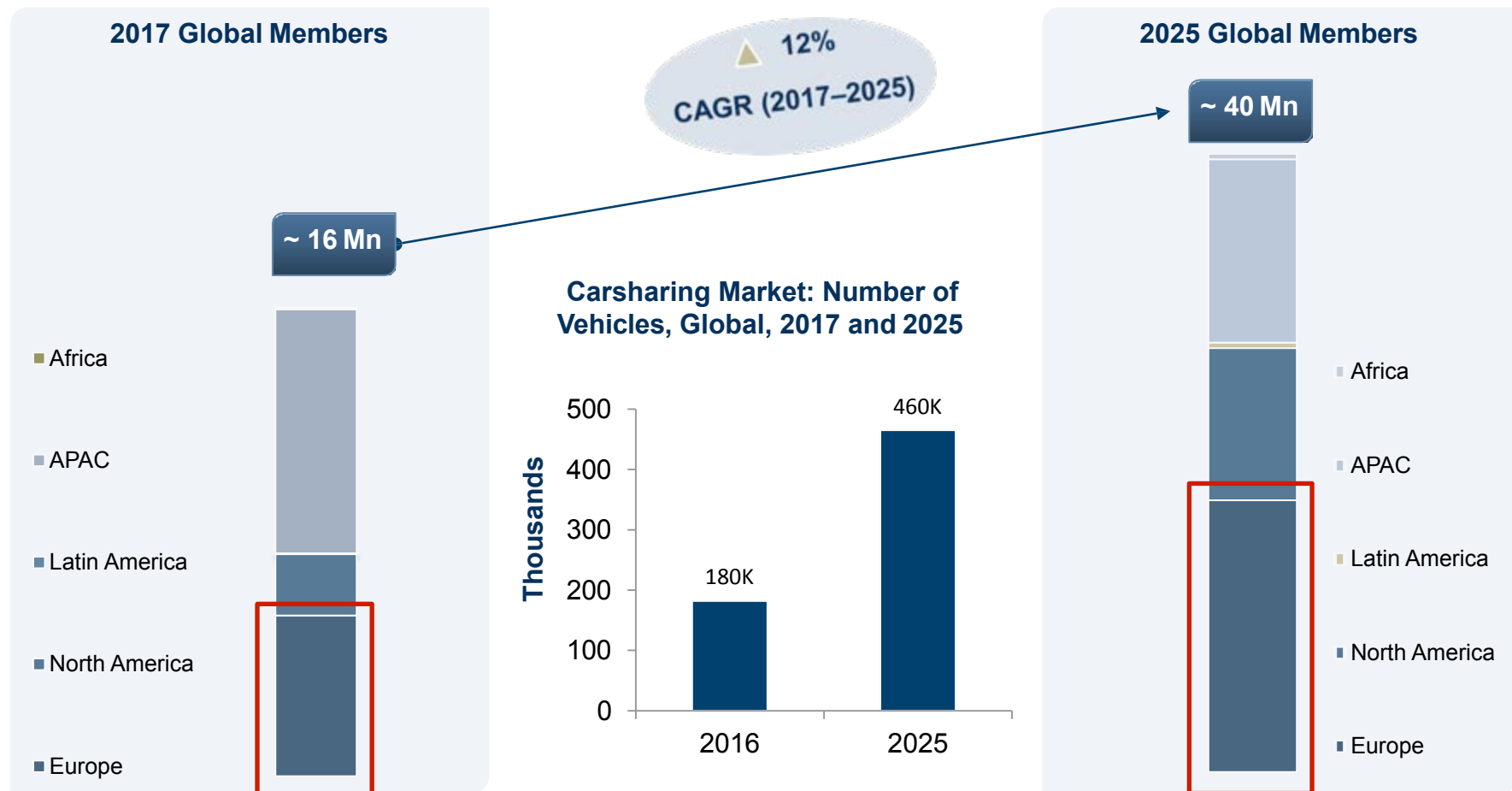


Source: Experian, Company Reports, Frost and Sullivan Analysis

# Carsharing: Members & Vehicles - Global Forecast

Revenue from the global carsharing market is expected to grow at a CAGR of 17%.to around \$9 bn in 2025 from the current \$2 bn in 2017.

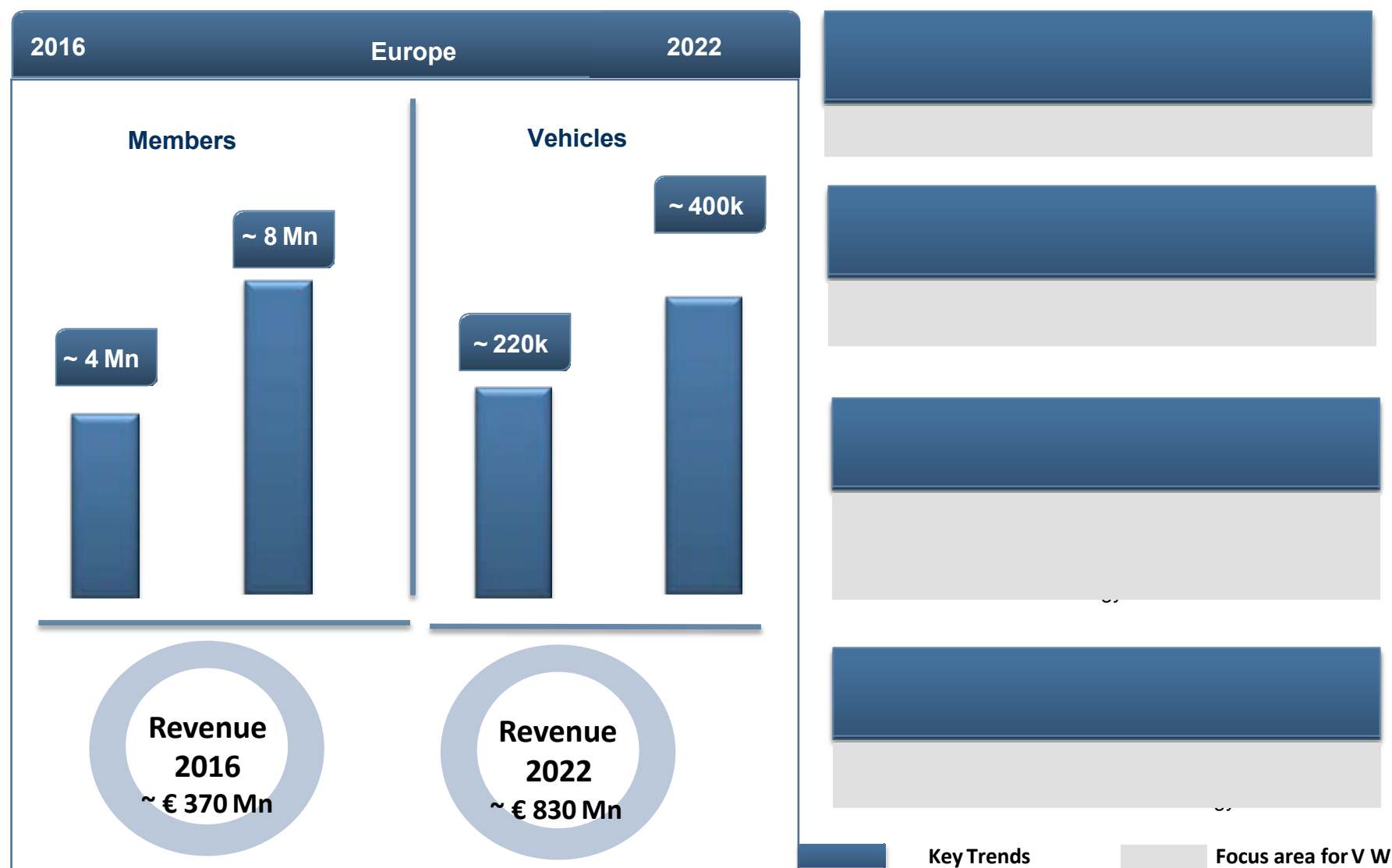
Carsharing Market: Members and Vehicles, Global, 2017 and 2025



Note: All figures are rounded. The base year is 2016. Source: Frost & Sullivan

# P2P Carsharing Market Overview

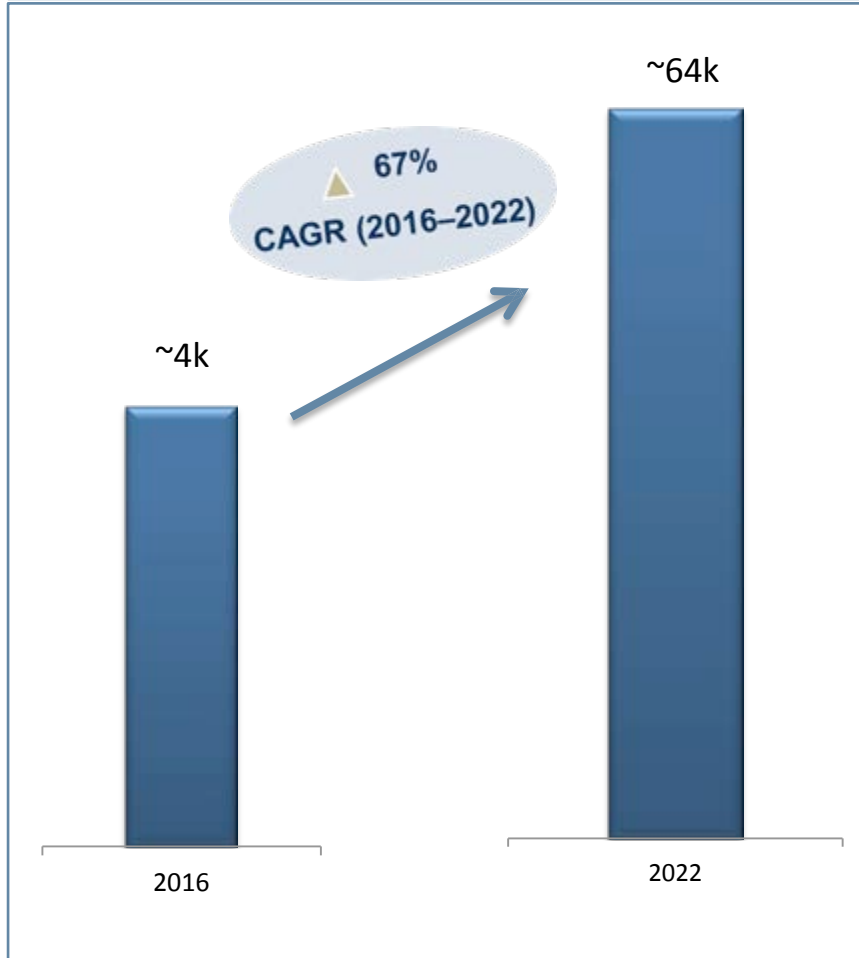
Integration of ridesharing and carsharing platforms with P2P carsharing can be expected to boost member growth in future



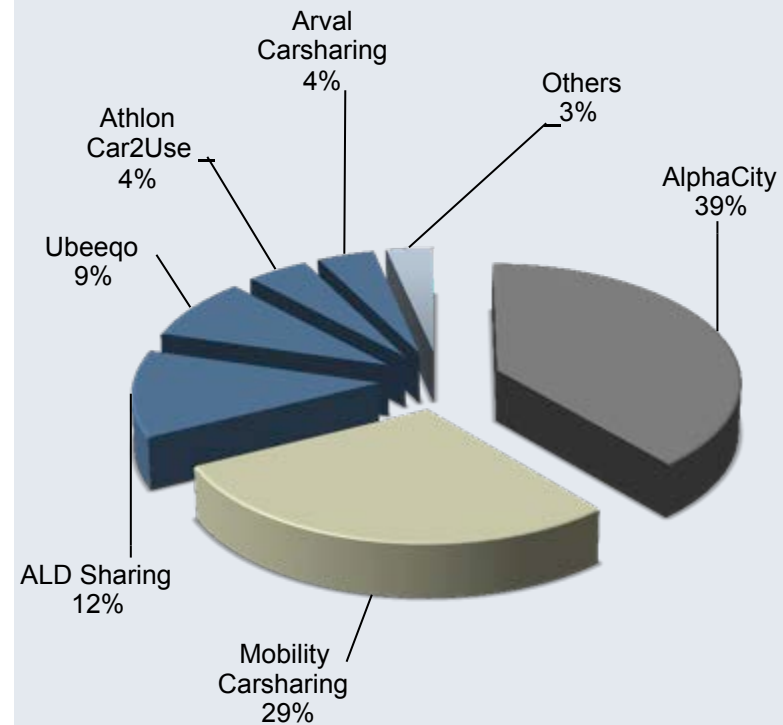
# Corporate Carsharing Market Overview

For leasing companies, partnering with corporate carsharing technology companies is a quicker route to market rather than going for in-house IT development

Corporate Carsharing Fleet Size, Europe



Corporate Carsharing, Ecosystem Mapping, EU



Leasing Companies/ Car Rental Companies/ OEMs/ Corporate CSO

OFT Aftermarket

Factory Installed

Proprietary Aftermarket

# Business Users Adopting Shared Mobility?

Although company car is still “king” in the short term, the market shows an increasingly higher levels of interest amongst businesses for corporate car sharing and car pooling

From: Private Ownership

To: Shared Mobility – Use Based Allowance



Evolution of Corporate Mobility Business Models

Source: Frost & Sullivan



# Ridesharing– The Next Hot Social Transportation Trend

## Europe



35 million Members

700,000 Members  
700 Corporates

## North America



350,000 Members  
130 Corporates

400,000 Members

## Asia

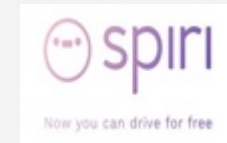


50,000 Members

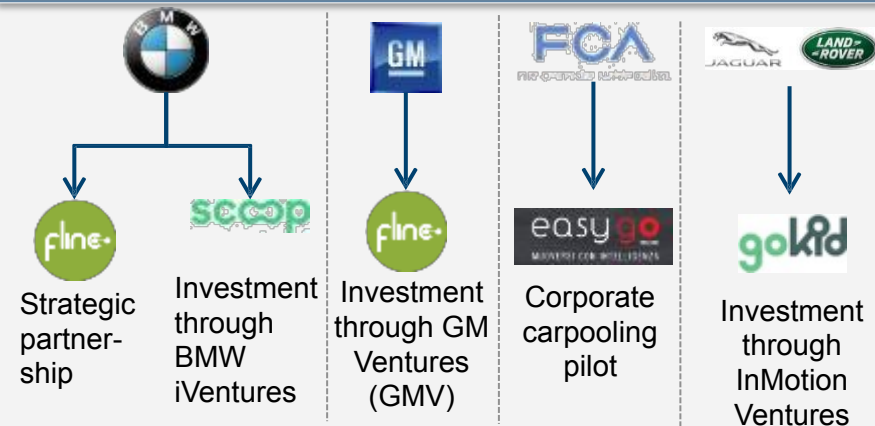
~ 1 million members

Shun Feng Che

## Business Model Innovation



## Partnerships



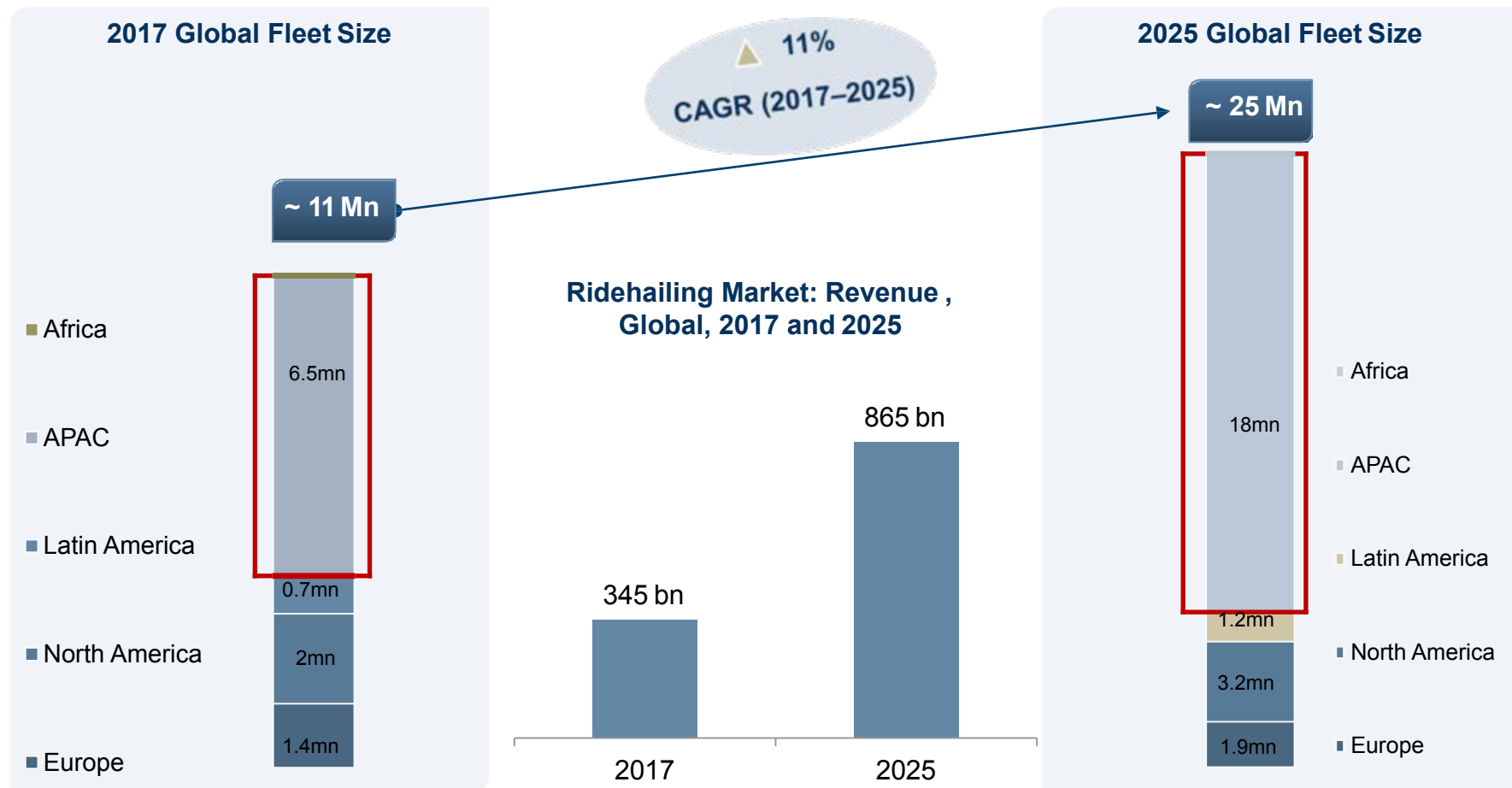
Source: Frost & Sullivan



# Ridehailing: Members & Vehicles - Global Forecast

Ridehailing is expected to penetrate the taxi market, catalyzed by growing online population, government initiatives, and evolving regulations, offering convenience and bundled services

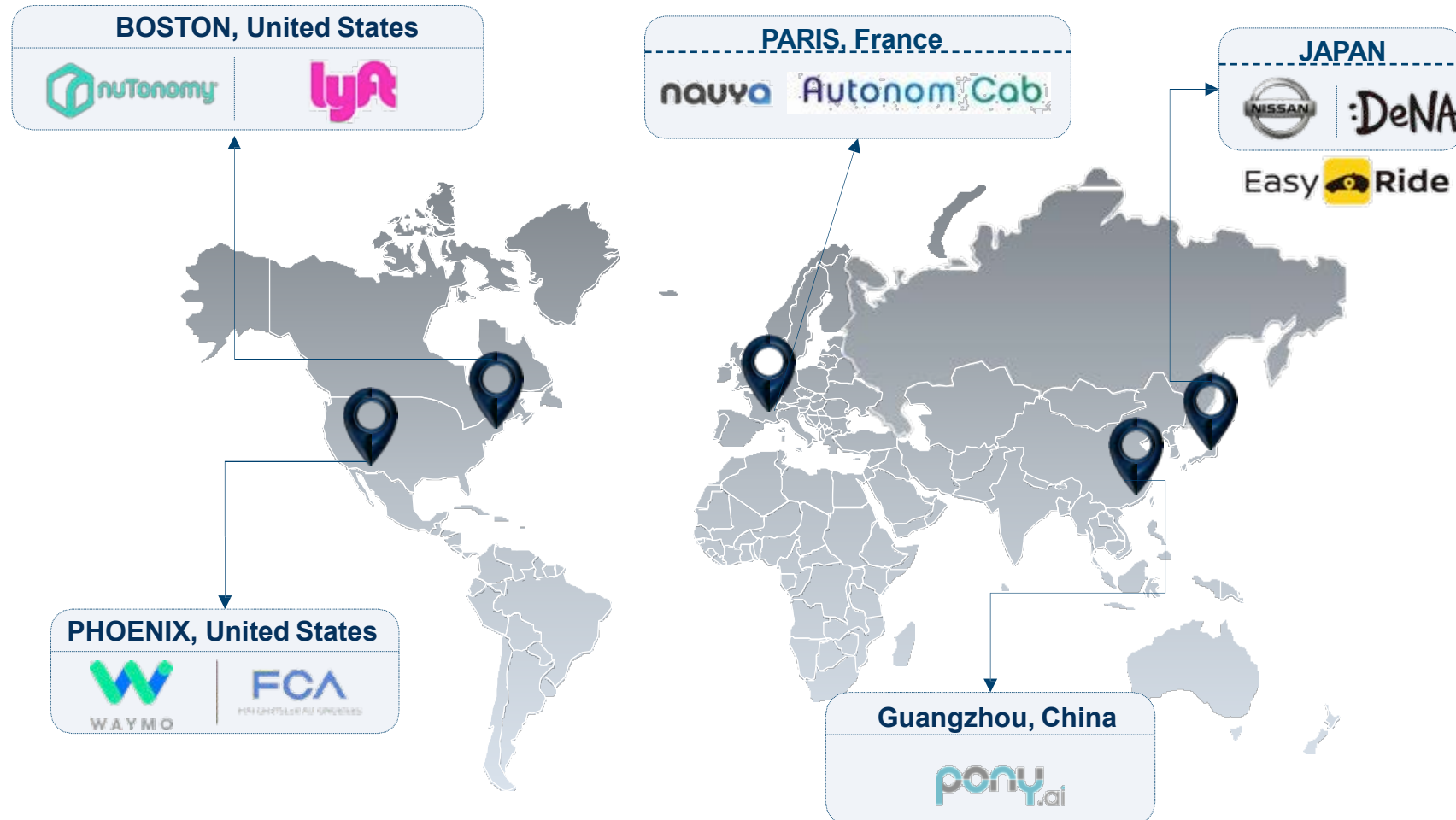
Ridehailing Market: Members and Vehicles, Global, 2017 and 2025



Note: All figures are rounded. The base year is 2016. Source: Frost & Sullivan

# Robotaxi – Global Snapshot

Mobility companies, OEMs and driverless technology platform providers together have pioneered significant advances in deep learning and AI bringing expertise for autonomous taxi and hailing services



Source: Frost & Sullivan