



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

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Taxi & Mobility Update 2018 19th April 2017

Shwetha Surender, Industry Principal, New Mobility

AGENDA

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

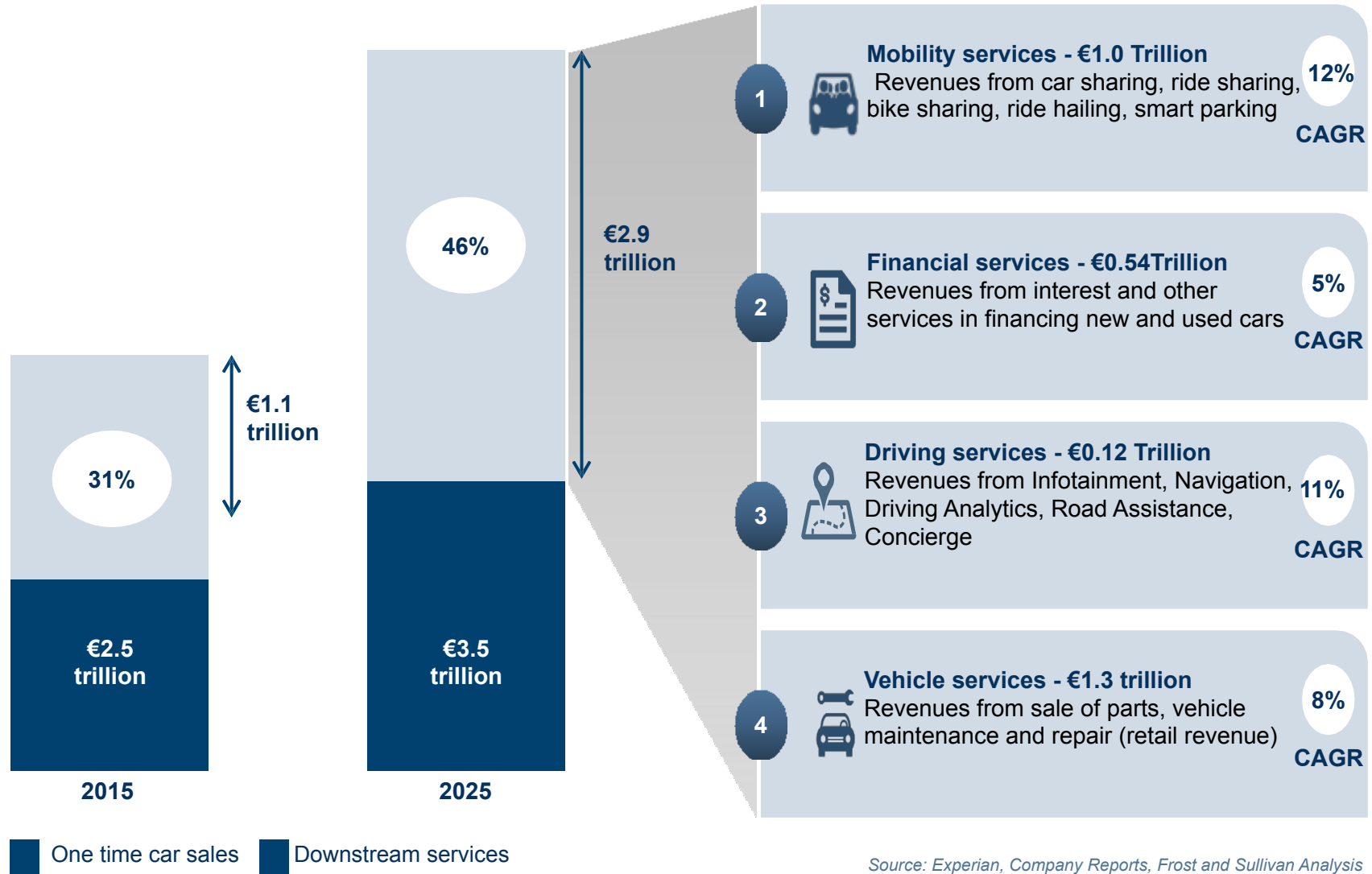
The development of New Mobility solutions - deep dive into market size, trends and future outlook

- 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

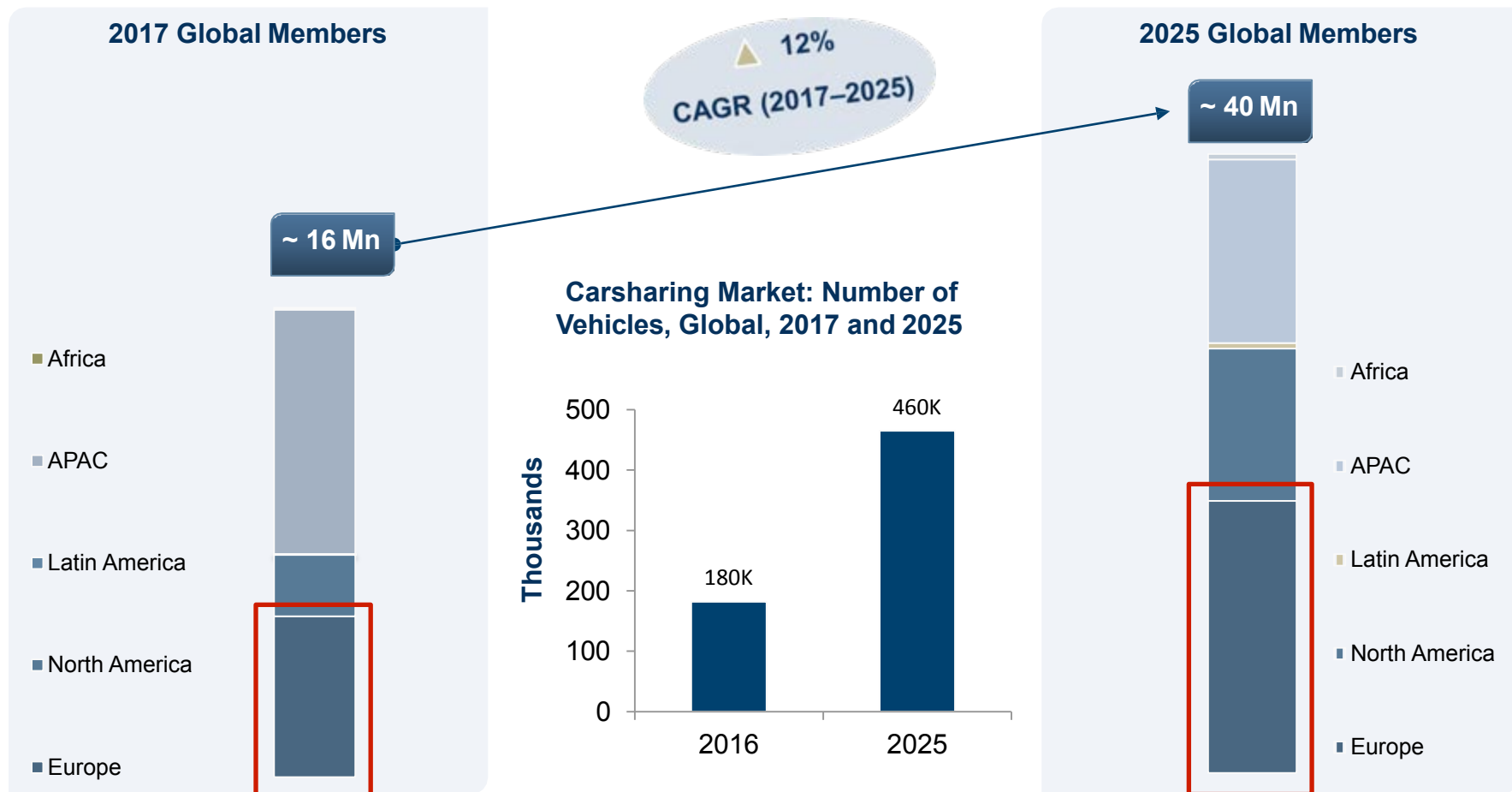


Source: Experian, Company Reports, Frost and Sullivan Analysis

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.

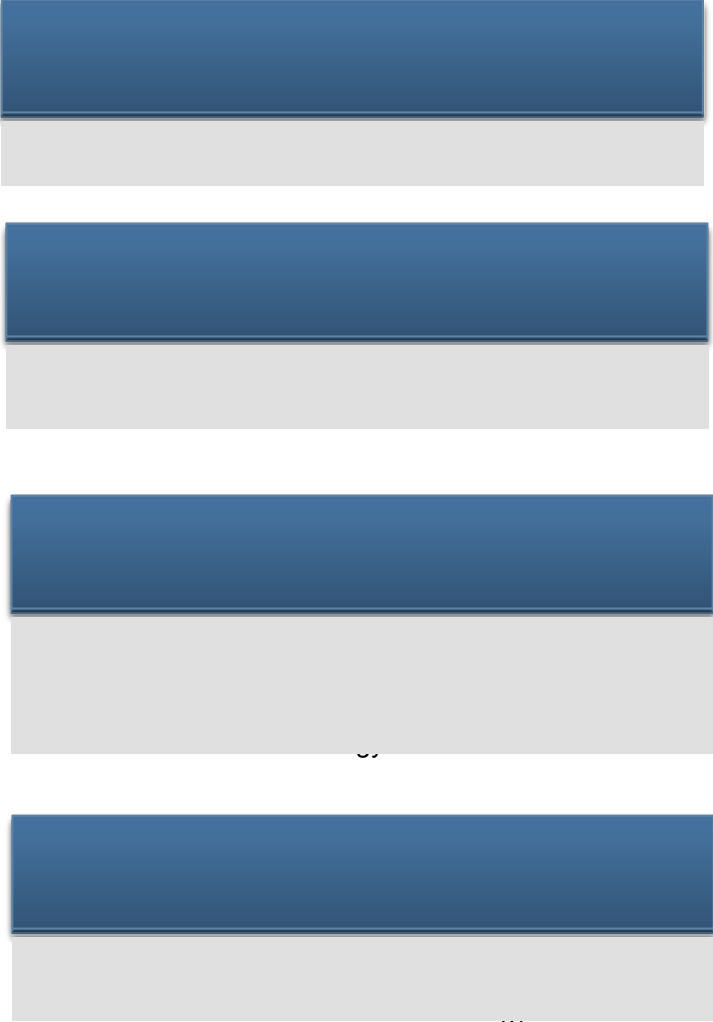
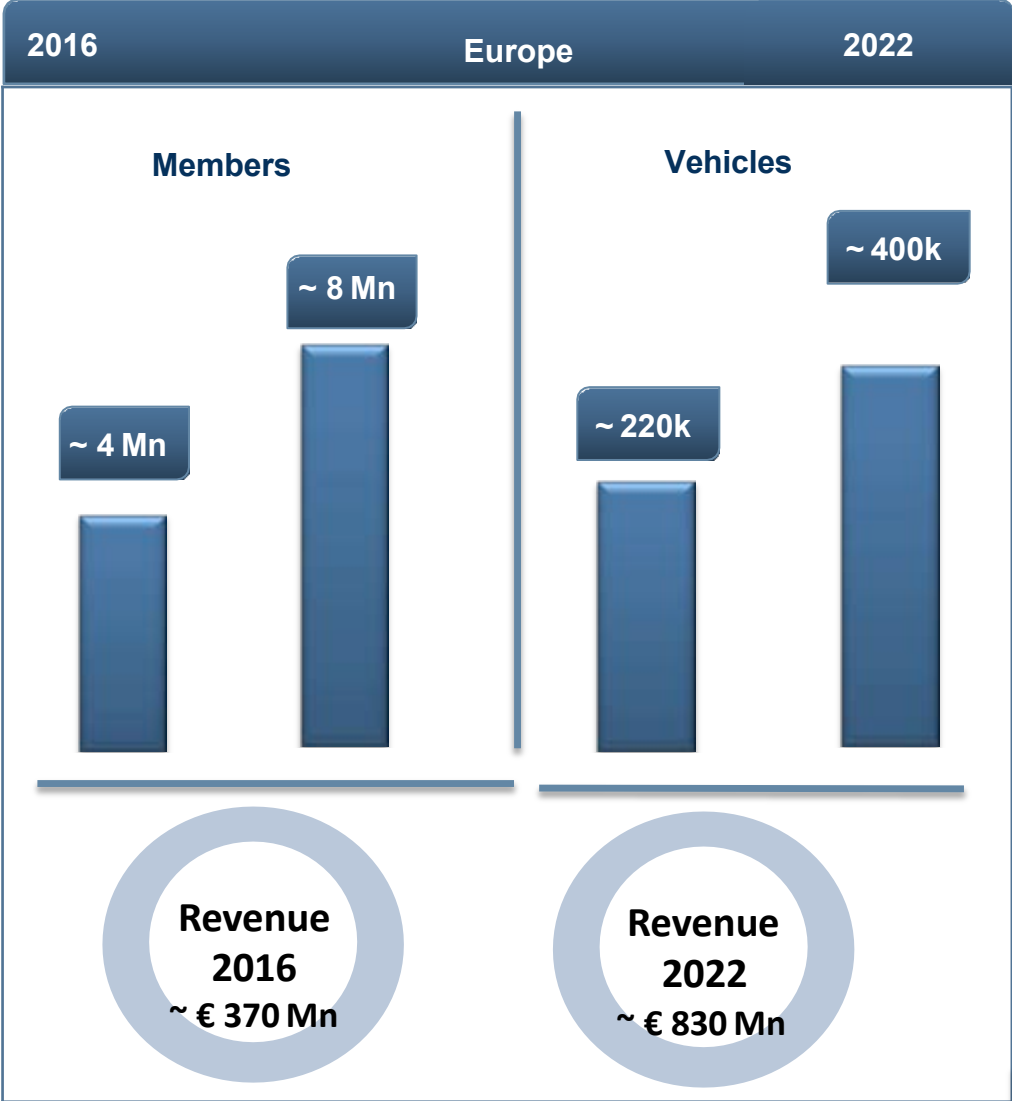
Carsharing Market: Members and Vehicles, Global, 2017 and 2025



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

P2P Carsharing Market Overview

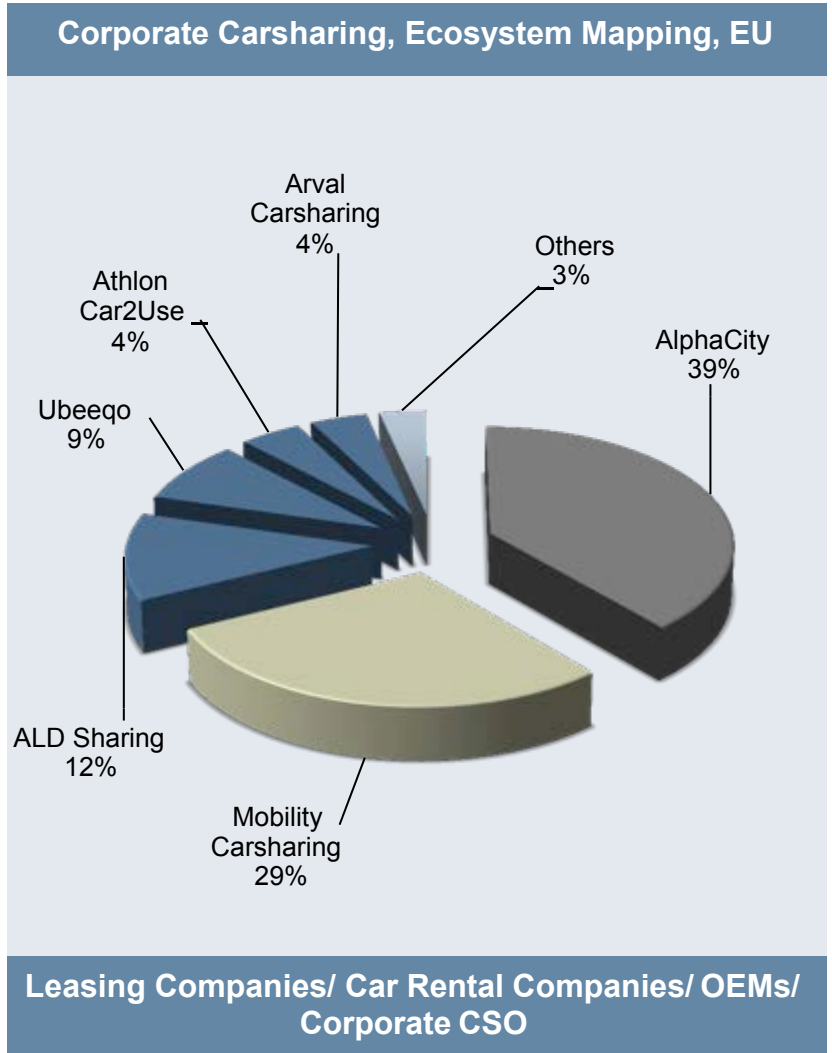
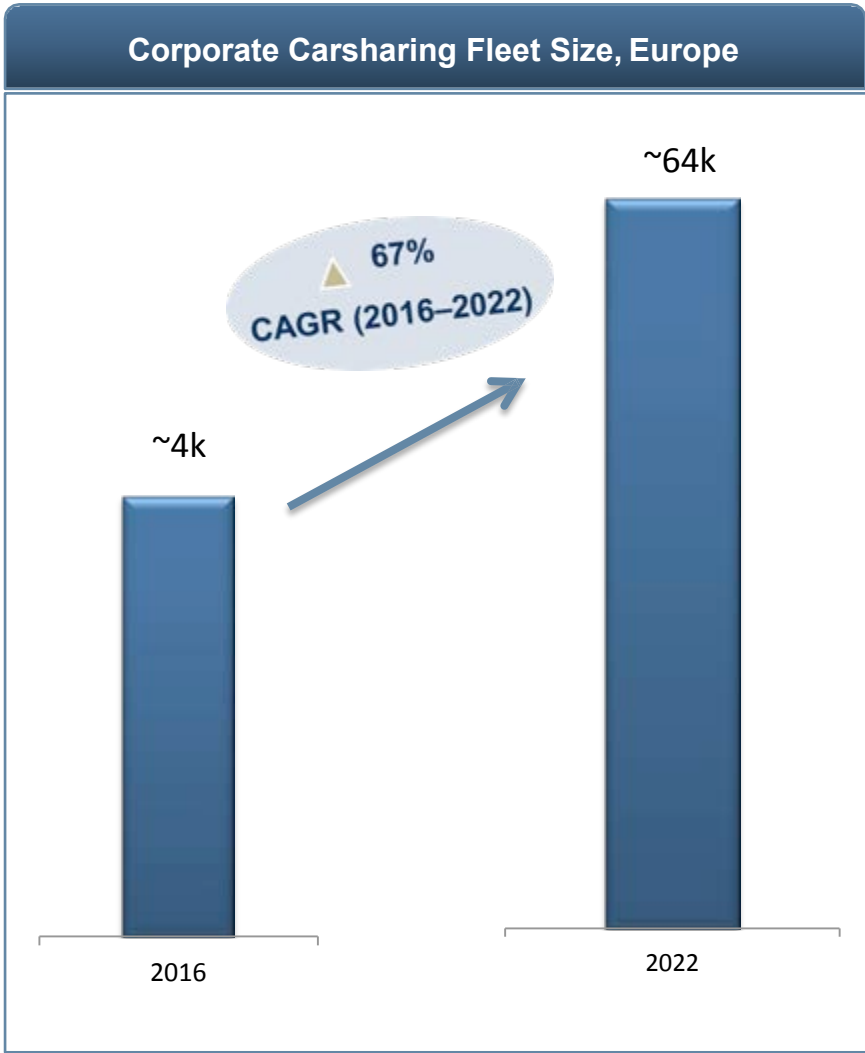
Integration of ridesharing and carsharing platforms with P2P carsharing can be expected to boost member growth in future



Key Trends Focus area for V W

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



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













Now you can drive for free



Collaborative Transportation

Partnerships

Strategic partnership

Investment through BMW iVentures

Investment through GM Ventures (GMV)

Corporate carpooling pilot

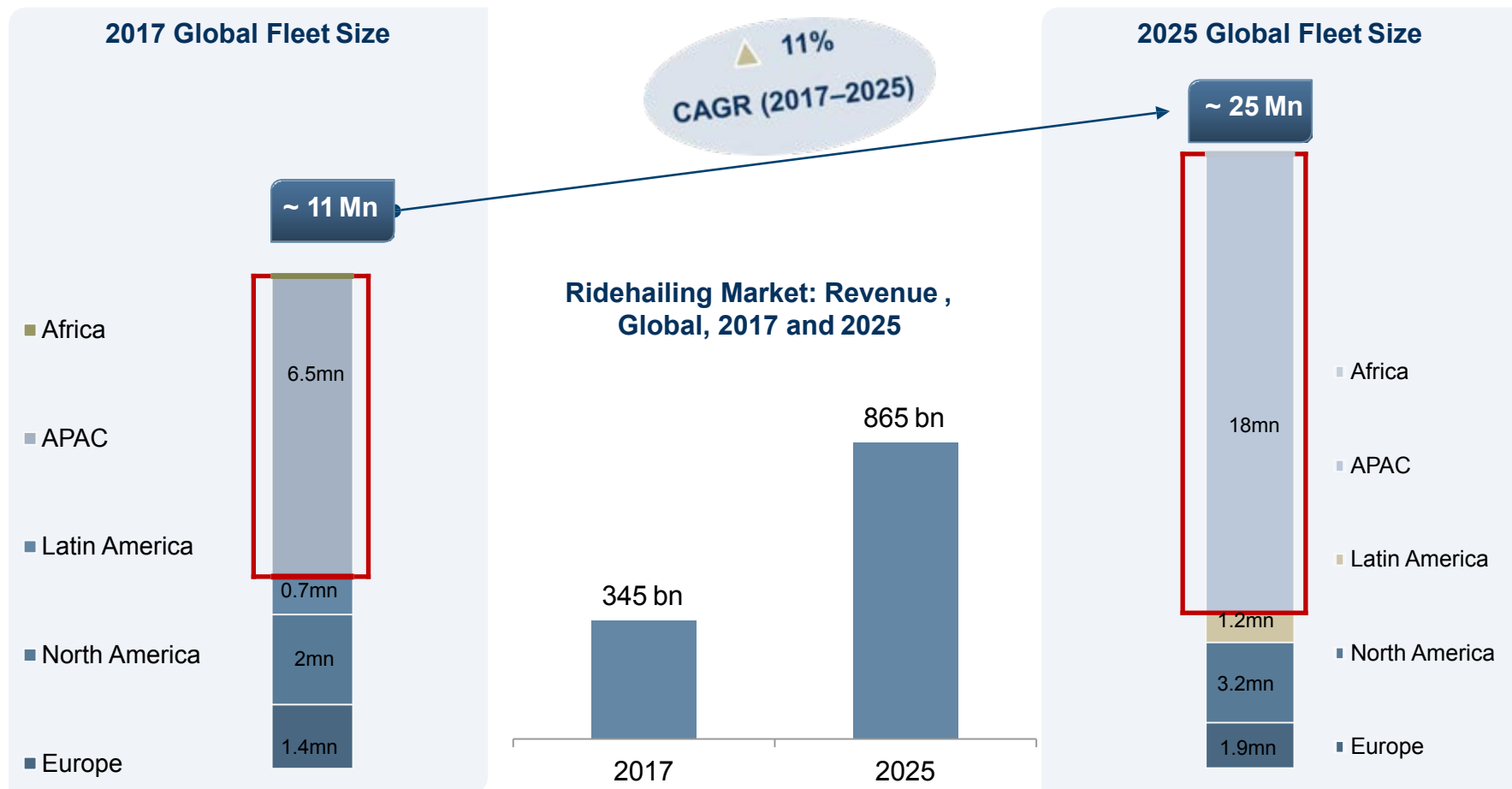
Investment through InMotion Ventures

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

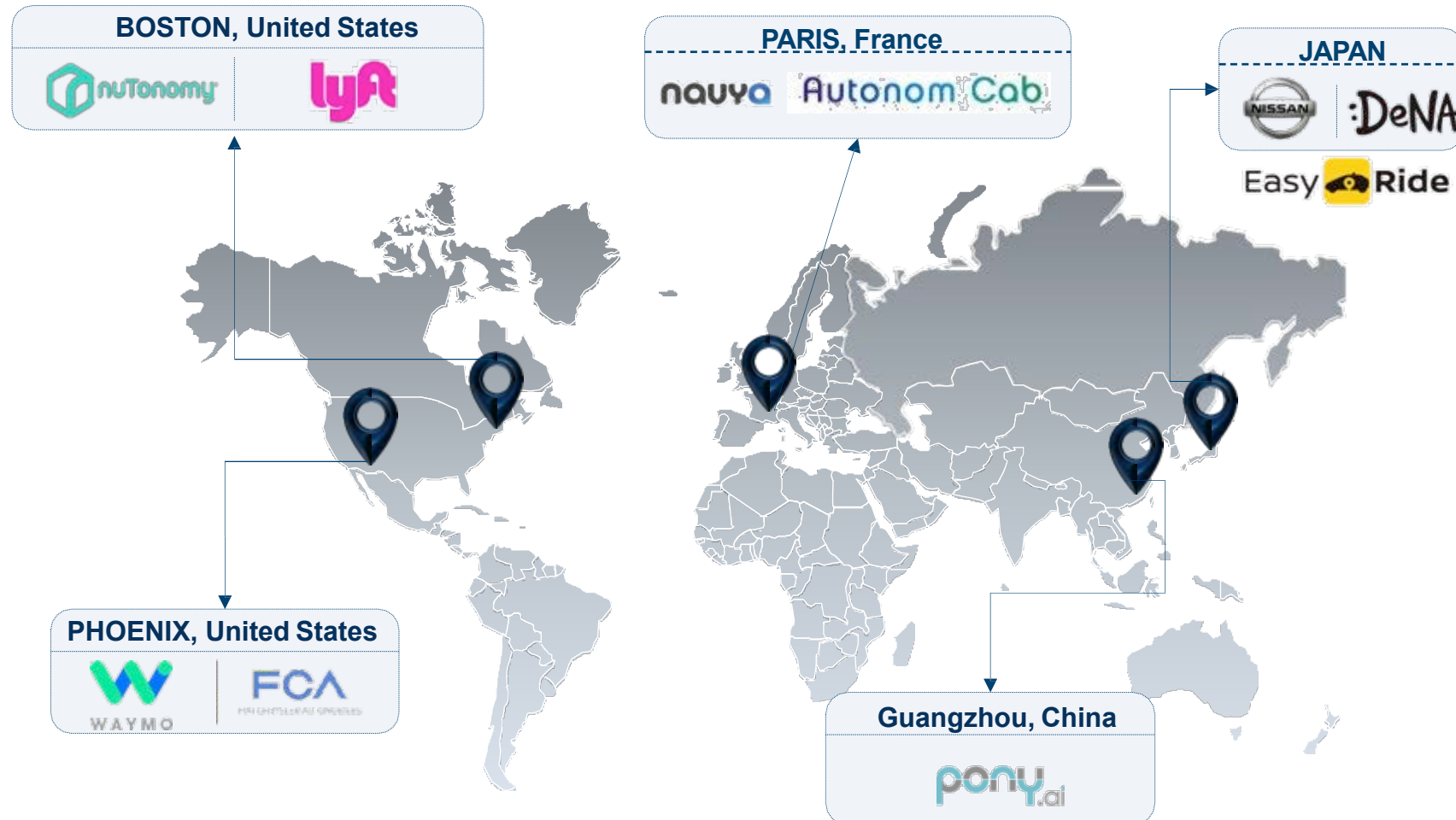
Ridehailing Market: Members and Vehicles, Global, 2017 and 2025



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