

FROST & SULLIVAN

INTELLIGENT MOBILITY

FUTURE BUSINESS MODELS IN CONNECTED AND AUTOMATED MOBILITY

New Mobility Business Models

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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

Converging Trends will lead to a Paradigm Shift from Vehicle Ownership to Vehicle Usage



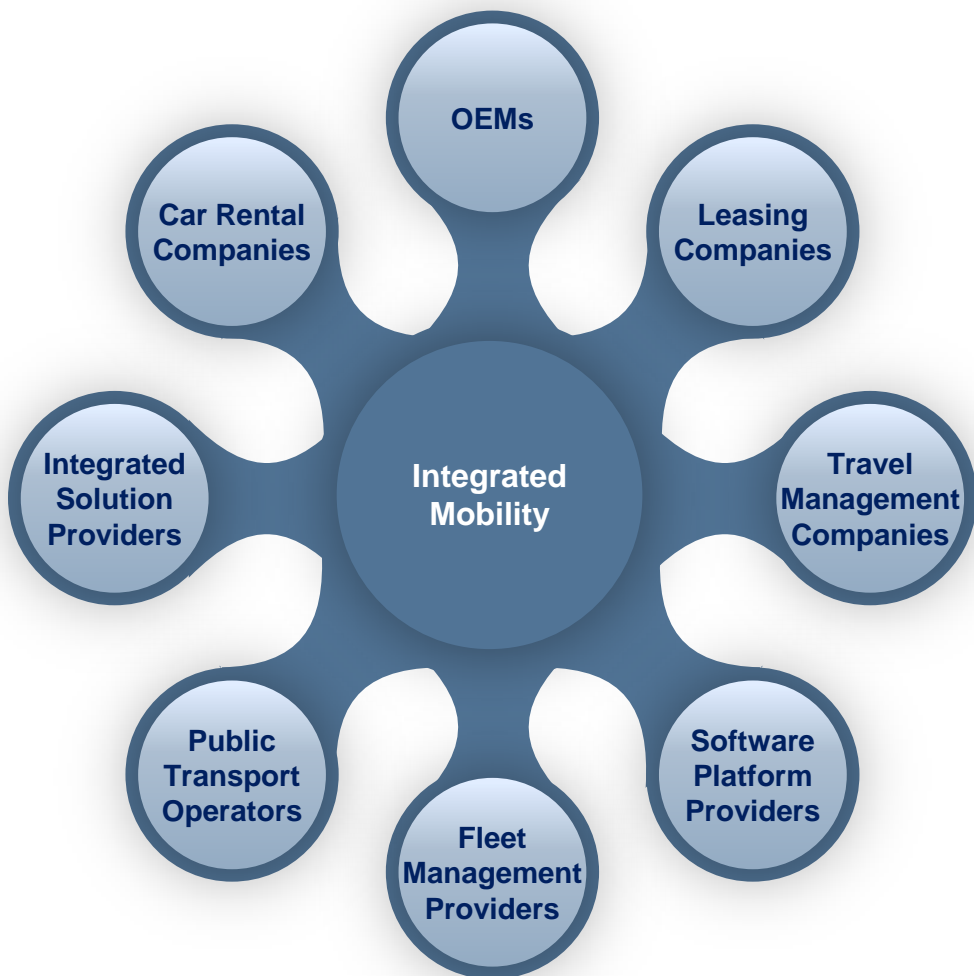
Innovative Mobility Categories are Growing & Evolving

Technology is facilitating a rise in New Mobility Business Models, particularly app-based, on-demand services that encourage access to mobility, rather than ownership; **>\$12bn has been invested in H12016!**



New Mobility Business Models & Partnerships Enable First/Last Mile

In both B2C and B2B environments customers are demanding intuitive services; many players investing significantly to deliver a seamless proposition & user experience for Integrated Mobility



	Taxi Services	UBER	HAIL O	Xmytaxi	
	Bike Sharing		Santander	velib'	
	Micro-mobility	scoot	TOYOTA i-ROAD	TWIZY	
	Car Sharing	zipcar	DriveNow	Enterprise CarShare	
	Corporate Car-Sharing	AlphaCity	ubeeqo		
	Car Rental	Hertz	avis budget		
	Ridesharing	BlaBlaCar	liftshare.com	goCarShare ^{oo}	
	Parking	JustPark	Parkopedia		
	E-Mobility	source LONDON	ChargeNow		
	Public Transport	DB	oyster		
	Integrated Mobility	moovel	Qixxit	moovit	Citymapper

What is needed for mobility solutions to become “mainstream”?
Policy, Investment & Behaviour Change

Changing Role of Public Sector in Mobility

As consumer habits change and technology allows innovative services, the role of the public sector is also adapting and partnering to enable, facilitate, or restrict some of the emerging mobility business models



Flexible scheduling & on-demand transit



Parking Supply & Monetisation



Automated Driving



Open Data



Carsharing Tenders, Operations, SLA's



Bikesharing Tenders



New Regulations for Mobility services



Integrated Mobility-As-A-Service

Source: Frost & Sullivan

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

Car Independent



Integrated Mobility:
Journey Planning,
Booking &
Payment

City Planners &
Lifestyle

Energy creation &
storage

Car Services



Carsharing

Parking &
Charging

Ride-
sharing

Taxi &
Limousine

Automated
Driving

Car Ownership



Finance

Maintenance

Connected
Services

Evolution & Expansion of OEM Services

Thank You!

Please contact us for more information on our Mobility research, events & advisory services

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