



Touring MaaS B2B2C Project

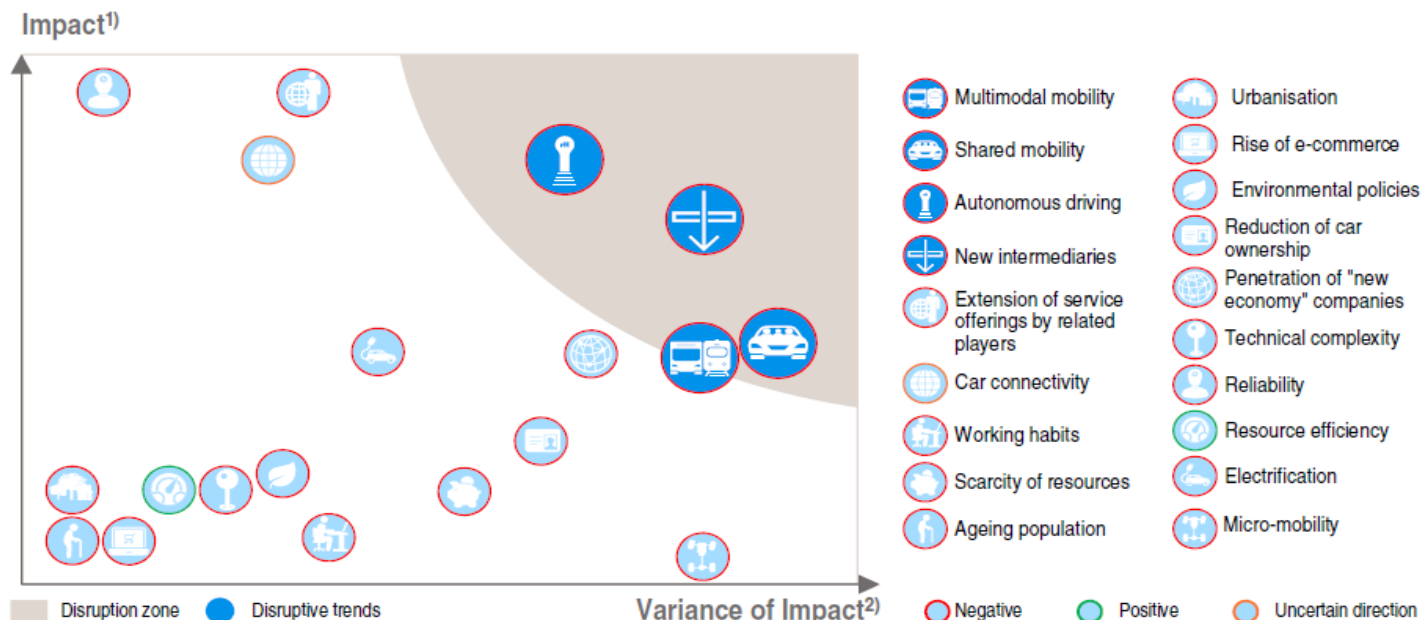
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# Identified trends for the next 15 years will put significant pressure on Clubs' traditional Mobility activities (esp. roadside assistance)

## Mobility trend mapping



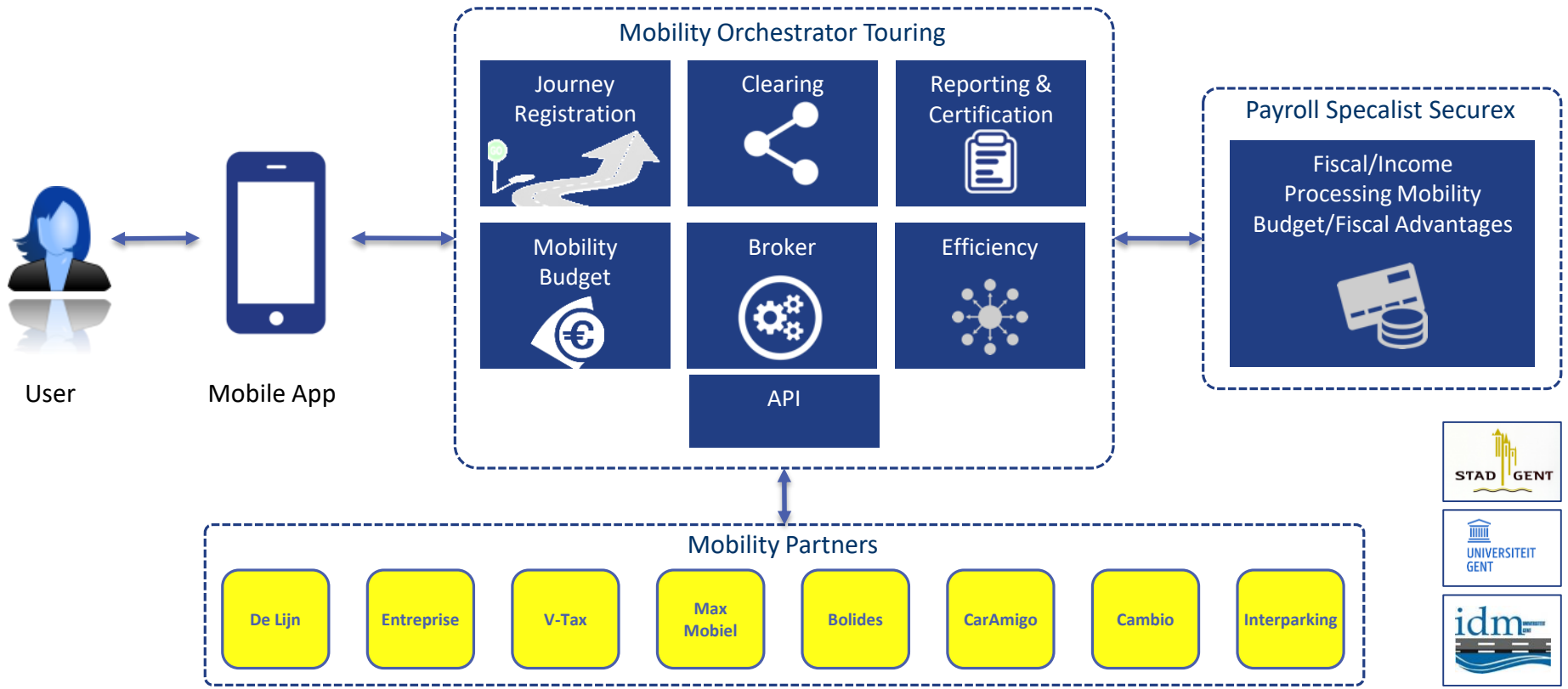
1) Impact on activities without Clubs' adaptation, taking into account car usage, service fit, need for assistance, market share and margin; ceteris paribus

2) Including the uncertainty regarding timing of realisation and level of impact

# The Ghent B2B2C pilot project

- The Institute for Sustainable Mobility of Ghent University examined, on behalf of Touring, the effect of Mobility as a Service
  - The MaaS app was tested by a group of 100 test persons working at Ghent University or Securex and living in the metropolitan area around Ghent. The project ran from April 18, 2017 to June 30.
  - The mobility providers involved in the MaaS pilot are: De Lijn, Cambio, MaxMobiel Bikerenting, MaxMobiel shuttle services, CarAmigo, Bolides, Enterprise, Taxi Lochristi/V Tax, Interparking, NMBS and Blue-bike.
  - Test persons were highly skilled, 52 % were in the age group 30 to 44 years.
  - Reasons for the participation in the pilot: can I become car-independent, sustainable mobility, curiosity, scientific research, realize mobility savings.
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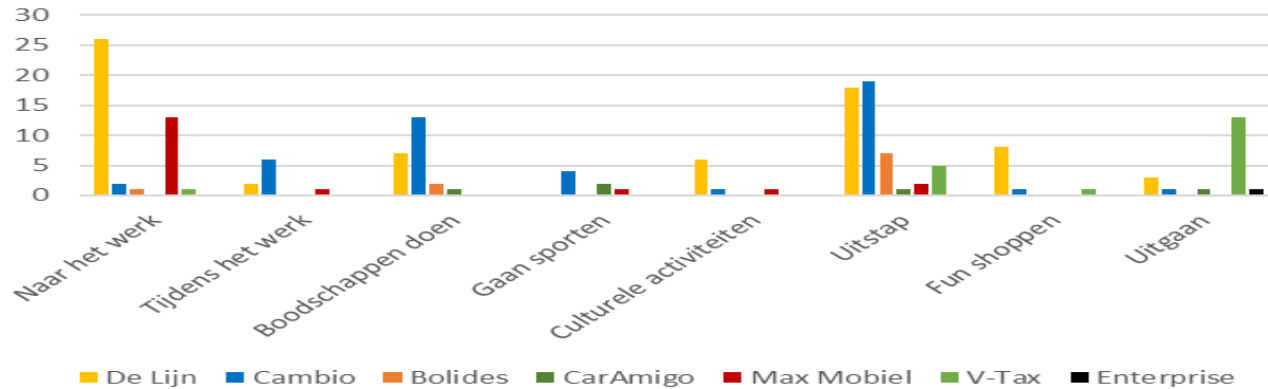
# MAAS Platform – Gent Pilot project



# Lessons learned Ghent pilot (first conclusions)

## Although final report will be ready and presented end of October following conclusions can already be drawn:

1. Although three test persons decided to sell their car the vast majority indicated that they still needed their car for certain types of mobility transfers (complimentary)
2. Even if the results were influenced by the pilot formula, we see a very important decrease in number of kilometers driven with own car
3. The absence of a multimodal journey planner was identified as the biggest shortcoming in the app. If there is no multimodal journey planner, participants (and users) are likely to drop out because there is too much time and energy needed for planning journeys. Detailed analysis of App usage will be made available to our platform partner Optimile
4. Per type of transfer we see a preference for a different mobility solution. E.g. for commuting bus and bike sharing are preferred options. For going out the taxi was the preferred option.



# Lessons learned Ghent pilot (first conclusions)

5. Most participants ( $\pm 53\%$ ) are satisfied with the range of mobility services in the MaaS app. In addition, approximately 36% find the offer too limited and about 11% finds the offer too large. **A market entry with a MVP is feasible and can be successful !**
6. According to most users ( $\pm 57\%$ ), the MaaS supply made it possible to realize the daily mobility pattern (ketenverplaatsingen). Most users ( $\pm 42\%$ ) are convinced that the offer is usually sufficient, and some (15%) indicate that it is always sufficient. According to other users, the offer only meets only sometimes ( $\pm 21\%$ ) to never ( $\pm 22\%$ ) their needs. The participants who indicate the offer is not sufficient, assume that planning their trips takes too much time and energy
7. The MaaS app was also evaluated by 7 different mobility providers (Cambio, CarAmigo, Enterprise, Taxi Lochristi, V-Taks, De Lijn and Max Mobiel). Approximately 86% of the mobility providers rated the pilot as good to very good
8. All mobility providers wanted to continue the collaboration with Touring MaaS.

# Touring MaaS Value Proposition

## **Our business:**

*Touring MaaS guides companies in the path to execute a sustainable mobility solution strategy by offering them a state-of-the-art mobility platform and journey planner which helps them to reduce and control their Total Cost of Mobility, and recommends various Mobility Solutions which enable them to become an employer of choice*

## **Our strategy:**

1. Offer the best solution available in each of the mobility management service domains
2. Develop an industry leading mobility orchestrator platform, journey planner and app
3. Use a transparent remuneration model aiming for measurable client value creation

## **Our mission:**

Be recognised as the leading mobility orchestrator in Belgium across the client segments that we serve.

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- Our integrated platform with journey planner—offering the various mobility services— helps Mobility owners to implement a performant, environmentally and corporate social responsibility driven Mobility strategy
  - Potential clients want to maintain high level of staff motivation by offering attractive Mobility solution choices and want to reduce Total cost of mobility, effect of traffic congestion and CO2
  - Transparent remuneration model: all services including HR Payroll administration are offered in one package for a single fee per month per employee
  - Future proof: anticipating the introduction of a Mobility Budget by the government and the evolution of mobility usage
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## We opt for a phased roll-out and product offering, in Phase 1 we will start with a MVP (minimum viable Product)



- Public transport
- Car Sharing
- Bike Sharing
- Taxi
- Parking



- cross-selling, upselling and premium mobility services and integration CRM



- Mobility Manager is a new innovative service, offering assistance to mobility users, while using any mobility provider
- Building on existing call center and network management capability of Touring



- Roll-out of consumer offering/B2C offering

## Product, service and tool offering: these products will be part off the Touring MaaS offering

- Bike sharing
- Car sharing
- Public transport
  - Bus, Tram, Metro (Flanders, Brussels, Wallonia) and Train
- Shuttle services (> industrial zones)
- Taxi in large and medium cities
- Rental bike
- Rental car
- Parking
  - On-street (cities) and Off-street (parking operators)
- Energy
  - Conventional cars and Electric cars
- Carwash
- Road assistance
- Car pooling
- Additional:
  - Multi Modal Route planner and Odometer (split private vs professional kms)
- Mobility Manager
- Private lease

## MaaS offering in Belgium is (at this stage) only viable if it is complementary to car ownership

- Although three test users of the Ghent pilot have decided to sell their car and substitute the car by other mobility solutions, the vast majority of Belgian employees cannot fill their mobility needs without a car.
- Maturity of mobility provider network (car sharing, bike sharing, public transport) is still too low to fill all mobility needs on an national level.
- Biggest potential for employees living (and working) in urban areas.

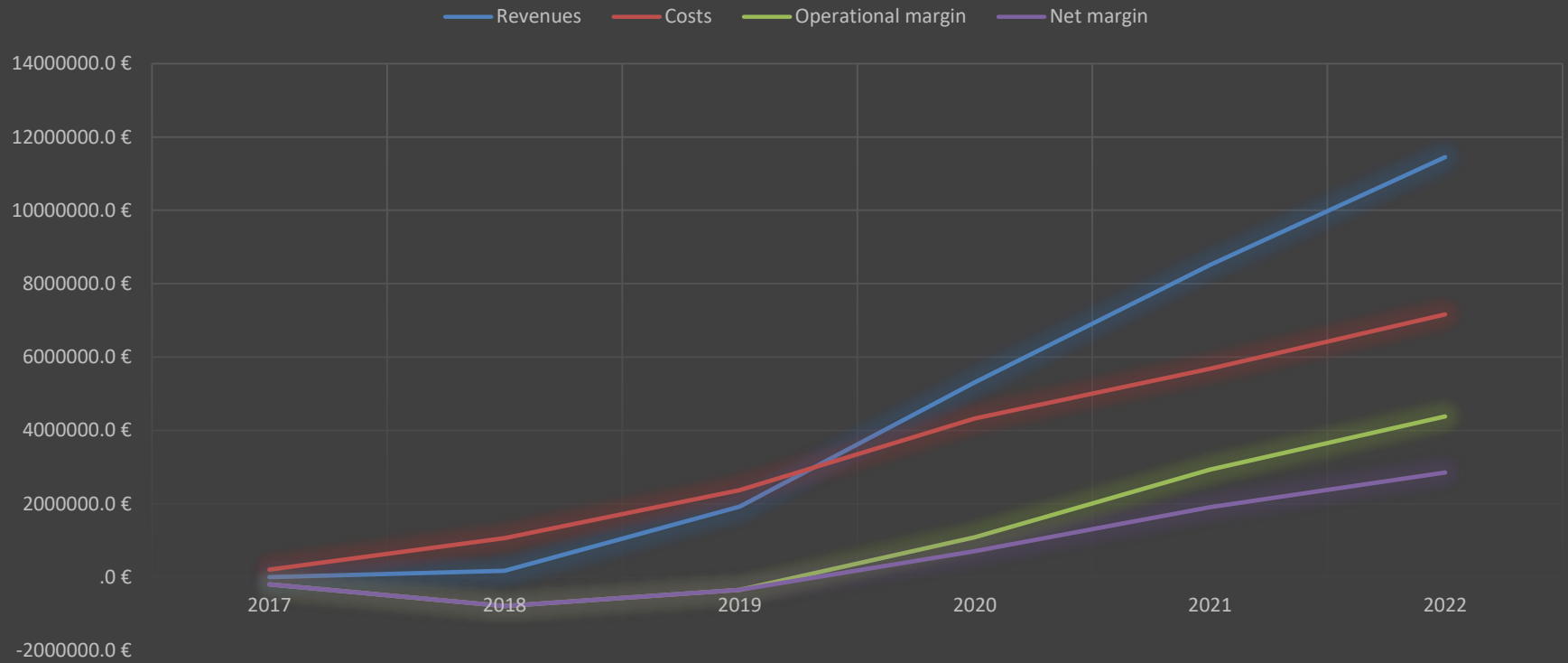
### Advantages *complementary-to-car* business model:

- Offering additional services to own vehicle, instead of replacing vehicle (and offering less convenience) will result in higher acceptance rate employees
  - Fiscal advice and optimization
  - Cost optimization
  - Savings through less mileage driven with company car
  - Optimization fiscal and cost balance between professional and private kms.
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# Update Financial Plan

## Evolution financial drivers

Margin evolution



# Key takeaways

- Not moving into MaaS could put the core B2B business (leasing companies, carmakers, ...) of an automobile club at risk !
  - MaaS is not only an ICT driven (platform) new business line. It is more about finding the best business model for your country and organization.
  - MaaS will not replace cars in the medium term but will still be complimentary to car ownership giving new opportunities for the core products of the automobile club and business development in B2C Membership and B2B.
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Thank you!