TABLE OF CONTENTS

Introduction

The Basics

Executive Summary

What's New

Key Findings

Summary Table

Go Deeper

Contact US

RELATED SBD REPORTS

526 – Connected Services Guide
Although the opportunities to benefit from connectivity are rising, so are the risks associated with implementing the wrong strategy or falling behind competitors.

It's therefore important to ensure that you always have the latest, most comprehensive, and most accurate information at hand. These reports are the reference guide to OEM connected car services offerings.

#618

CON

Connected Car

Mobility Services Guide

Within the automotive industry, the continued popularity of vehicle leasing has recently run alongside the rise and success of third-party mobility services. This success piqued OEM interest in the mobility service ecosystem - with some investigating the revenue streams it could open, and others investing in mobility services or establishing their own.

However, unlike other ecosystems in the automotive industry, the ecosystem for these services and covers a number of business models that each have a different target market and offer a similar variety of processes and benefits for the user and OEM alike. Likewise, with the eco-system evolving as new functions and features are introduced, external investments and acquisitions are made, and as service offerings continue to differ between regions - it can be easy lose track of where the ecosystem stands today and how it could evolve in the future.

The Mobility Services Guide works to comprehensively define and understand the current landscape of mobility services and identify the factors that are likely to influence its evolution. It covers several service types in depth - from ride-hailing services to car rental services - and highlights the latest OEM activity in the space, while thoroughly profiling its key players have to offer.

COVERAGE

GLOBAL NA CHINA EUROPE

FREQUENCY

ANNUALLY BI-ANNUAL QUARTERLY

PUBLICATION FORMAT

PDF POWERPOINT EXCEL ONLINE

PAGES

54

Request price

Key questions answered

- > What current mobility services are out there?
- > How are these services being deployed?
- > What is their business model and value change?
- > What are the key initiatives and activities around connected mobility?

This research supports

PRODUCT PLANNERS

C-SUITE

MARKETING

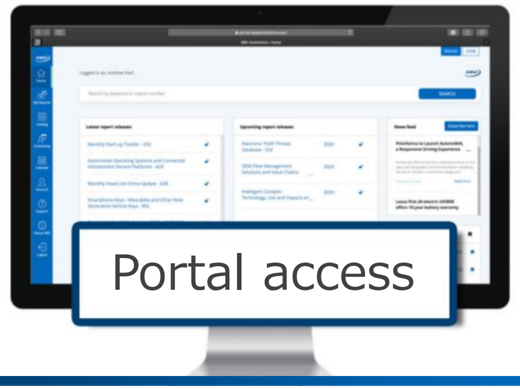
ENGINEERS

Do I have access?

100+ Reports published per year

50k+ Slides of insights, forecasts & data

4,000+ # of auto professionals who access our reports



Request a quote for

Mobility Services Guide
Bi-Annual Report for 2022

Request price

Request price

618 Mobility Service Guide

Contents

618 - Mobility Service Guide

[Introduction »] 5

[The Basics »] 7-9

[Executive Summary »] 11-15

[What's New? »] 17-20
- Geographical Expansion
- Partnerships
- Electric Mobility

[Key Findings »] 22-30
- Introduction
- Key Facts
- OEMs Role
- Operating Channels
- SWOT Analysis
- Business Approach
- Utilities Covered
- Challenges
- Go Deeper

[Summary Tables »] 32-51
- Introduction
- Understanding Summary Table
- Car sharing
- Ride Hailing
- P2P Sharing
- Carpooling
- Car Rental
- Multimodal
- Go deeper

[Go Deeper »] 53

[Contact Us »] 54

Data Deep Dive

View and analyze deep data in your own way

Total number of pages - 54

Introduction

Introduction

The shared mobility services segment is developing with mobility service providers expanding their market coverage and variety of services. This success piqued OEM interest in the mobility service ecosystem - with some investigating the revenue streams it could open, and others investing in mobility services or establishing their own.

However, unlike other ecosystems in the automotive industry, the ecosystem for these services covers several business models that each have a different target market and offer a similar variety of processes and benefits for the user and OEM alike.

Part of these is also location-dependent. The report highlights significant differences in strategies and general trends in the different regions analyzed (US, China, Europe). In this respect, China's ecosystem is even more different than the other two, due to the more mobile-based approach where web channels are almost absent, and instead, most players will also feature a WeChat option.

The mobility service guide covers several service types in depth - from ride-hailing services to car rental services - and highlights the latest OEM activity in the space, while thoroughly profiling what its key players have to offer.

Overall, it draws an in-depth picture of the mobility service market, its drivers, its development direction, and the brands involved in it.

Section	Content
The Basics	Overview of the conditions that we have considered for the mobility service shown in the report and the different categories of the mobility service.
Executive Summary	The section highlights the market characteristics from a business model and regional perspectives, giving insights into OEMs' financial investments, drivers, and risks. **Conclusion:** The mobility service market has great potential for growth. OEMs are jumping in to find new business models and revenue streams, but the regional differences are still significant.
What's New?	Section focusing on the market expansion, and the most important partnerships and acquisitions completed, as well as on the continued push toward electrification. **Conclusion:** The acquisition of smaller players is one of the most direct ways for larger companies to expand or enter a new country. The evolving regulatory environment also plays a relevant role in some companies' choices
Key Findings	In-depth into the market strategic and financial trends, the digital channels' development, risks and opportunities, and the service providers' models with pricing and features strategies. **Conclusion:** A closer look shows the segment variety with large differences in risks and opportunities, business models, and features.
Summary Tables	Each slide in this section details a group of service providers adopting the same architecture. It also features a table with the service providers' market coverage, and grid placing each one of them against the other for number of customers and availability.
Go Deeper	Can SBD help you with any unanswered questions?

Example slides from the full report

Request price

Types of mobility

1 Carsharing

A short-term car rental model, allowing users a choice of vehicle and pick-up/drop-off locations. Tthis type of service use Smartphone apps and/or RFID cards to allow users temporary access to the vehicle.

2 Ride-Hailing

A form of taxi hailing where the drivers are usually contractors using their private vehicles rather than direct employees. Ride-hailing services take advantage of smartphones and GPS locations and act as the next evolution of taxi services

3 P2P Sharing

This type of service allows vehicles owners to rent them out when not in use. This type of services takes advantage of the peer 2 peer sharing economy that propelled companies in other sectors to great success.

4 Carpooling

This service allows users to join an already planned journey. The operating company acts as the "middle man" through which journeys can be advertised and joined.

5 Car Rental

An evolution of traditional car rental by the day, allowing users to rent cars out for a variety of time periods without the traditional hassles of this type of service.

6 Multimodal

An aggregator of mobility services as well as other means of transport such as public transportation, train networks and even taxi.
Multimodal services have the main objective of getting people from point A to point B in the quickest, cheapest or most efficient way possible, depending on user preferences.

Regional strategies difference by business model and packages

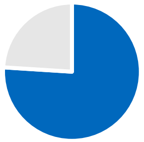
With mobility as everyday priority for everyone there are different regions taking different roads towards the registration subscription and price inclusions which are highlighted in the table below.

Legends

Free | Pricing Charged

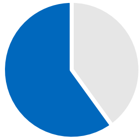
United States of America

Registration



76% of mobility service providers in the USA provides **free of cost** registration to the users

Subscription



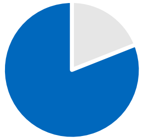
40% of mobility service providers in the USA provides **free of cost** subscription to the users

Pricing Bundles

- The mobility service providers in the US includes **Mileage** as the primary utility in pricing as bundle
- It is followed by **Fuel** and **Parking** as the secondary utility

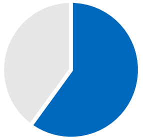
Europe

Registration



81% of mobility service providers in Europe provides **free of cost** registration to the users

Subscription



60% of mobility service providers in Europe provides **free of cost** subscription to the users

Pricing Bundles

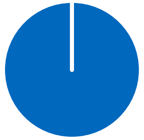
- The mobility service providers in Europe includes **Fuel** as the primary utility in the pricing as bundle
- It is followed by **Mileage** which is mainly provided by the car rental service providers

China

Registration

53% of mobility service providers in China provides **free of cost** registration to the users

Subscription



100% of mobility service providers in China provides **free of cost** subscription to the users

Pricing Bundles

- The mobility service providers in China includes **Mileage** as the primary utility in the pricing as bundle
- The **Fuel**, **EV Charging** and **Parking** are only provided by the Car Rental service providers

Accelerating Electric Mobility

MOIA and HANSA-Taxi launch e-charging pilot project

The mobility service provider MOIA and the taxi agency Hansa-Taxi have partnered and launched a four-month pilot project for shared charging infrastructure. More than 200 e-taxis are available across the city after the "Future Taxi" project launched in 2021 saving 1,000 tons in CO2 emissions.

MOIA is granting five other companies with a total of ten taxis round-the-clock access to its fast-charging stations in Hamburg-Horn, where the vehicles can be fully charged in 20 to 30 minutes. MOIA and Hansa-Taxi will evaluate the test phase later and, if successful, add further functions such as a reservation option for using the charging stations

Eni's Enjoy fleet goes electric in the City of Turin with the arrival of 100 XEV YOYO city cars

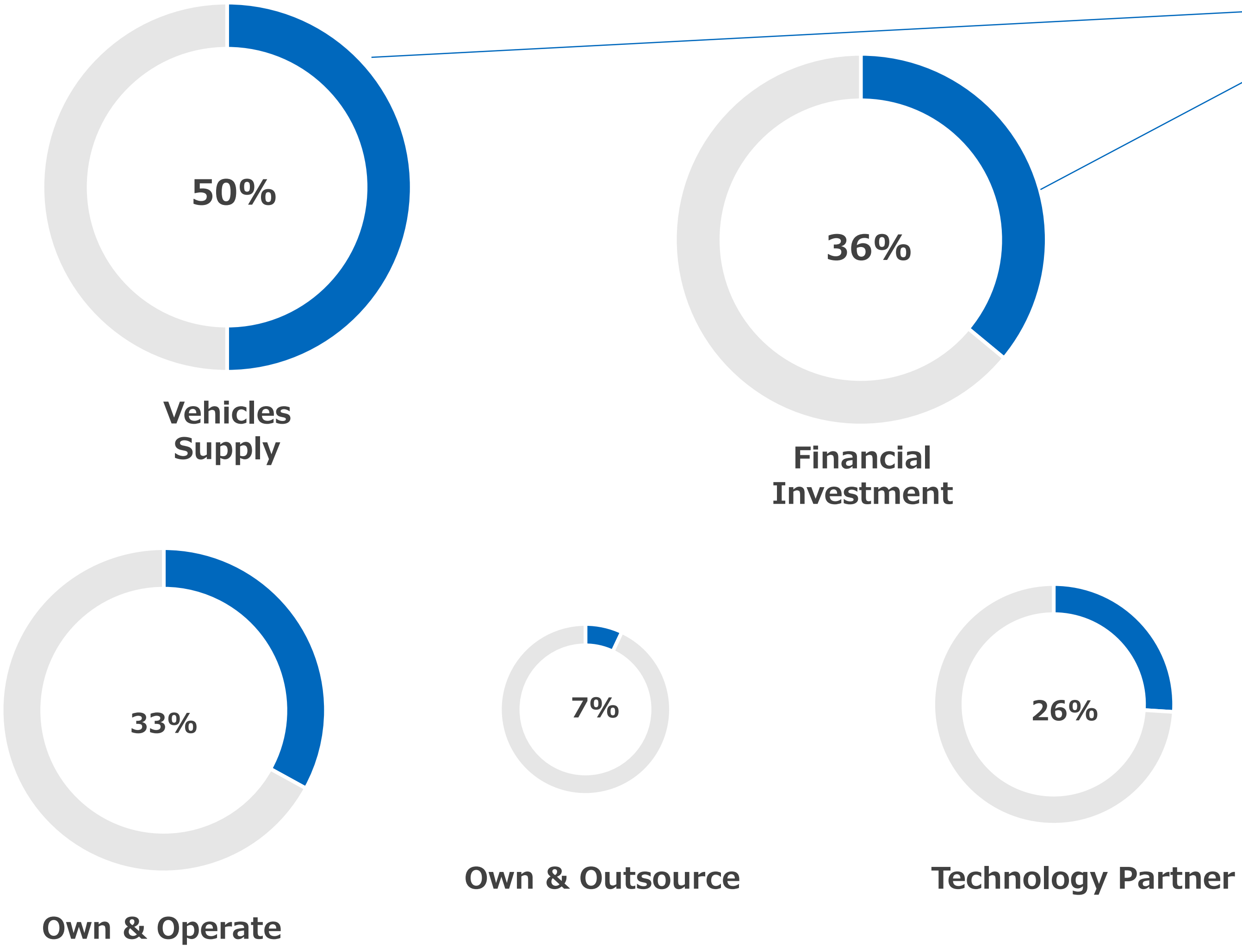
Enjoy customers in Turin who can rent one of the 100 brand new XEV YOYOs via the app. The new cars join the existing fleet of 300 cars and cargo vehicles already available in the city.

Enjoy has over 1 million customers in Italy and has exceeded 14 million rentals since 2013. With a total fleet of 2,500 vehicles, Enjoy is also present in Milan, Bologna, Florence and Rome, where electric car sharing with XEV YOYO city cars will be introduced in the coming months.

The XEV YOYO is a fully electric city car with a top speed of 80 km/h and a range of up to 150 km. The car has a sunroof and battery swapping features.

What? support OEMs are providing to mobility service providers

Automotive OEMs are lending their hands in the mobility service business by helping with the financial aid for the service providers to lead and expand in the market.



Overview

- Majority of the OEMs are involved in this segment. Notable OEMs include Mercedes-Benz, JLR, Toyota, GM Group and Stellantis.
- Mostly OEMs like Mercedes-Benz, BMW, JLR, Ford, Toyota etc. supply vehicles to major mobility services providers like The OUT, Urby Mobility, and Smart Ready Go. Etc
- Stellantis owns and outsources Free2Move apart from Mercedes Benz's Blacklane.
- OEMs that own and operate are mainly the technology partner of their services like Fetch Car sharing, TOTEM Mobi, etc.

What the Excel Version Contains

Request price

Excel Database Includes

618 - Mobility Services Guide

618EU-22-HY2			Deep Dive									
Service Name	Program/Service	Vehicle Offering	OEM Involvement					Key Numbers						
			Own & Operates	Own & Outsource	Financial Investment	Supply Vehicles	Technology Partner	Customers	Region Specific	Cars	Region Specific	EU Cities	Countries
AlphaCity	Service	BMW, Mini				BMW		89000	Global	700000	Global	TBA	10
Audi on demand	Program	Audi	Audi			Audi	Audi	664000	Global	10000	Global	TBA	1
BEAT	Program	JAC, Tesla	BMW, Mercedes-Benz			BMW, Mercedes-Benz	BMW, Mercedes-Benz	26000000	Global	800000	Global	TBA	1
BlaBlaCar	Service Discontinued												
Blacklane	Service	TBA		Mercedes-Benz	Mercedes-Benz	Mercedes-Benz		TBA	N/A	TBA	N/A	TBA	1

Excel Data Points:
3,500+

Services Covered:
58+

Excel Tabs:
6

Excel Database Includes

618 - Mobility Services Guide

618EU-22-HY2

Service name	Published Date	Title	Link
ZITY	16/06/2022	Edenred expands its Ticket Mobilité partner network to include	LINK
Moia	11/07/2022	MOIA shares charging infrastructure with Hamburg's electric taxi	LINK
Moia	13/07/2022	Change of leadership at MOIA	LINK
Uber (Ride hailing)	31/05/2022	Uber partners with the largest taxi service in Italy	LINK
Turo P2P	01/06/2022	Car-sharing startup Turo expands to New York and France	LINK
Turo P2P	01/06/2022	Turo Acquires OuiCar and Expands into New Markets	LINK
Turo P2P	17/05/2022	Capital One & Turo partner to reward your travels	LINK
Turo Car Rental	01/06/2022	Car-sharing startup Turo expands to New York and France	LINK
Turo Car Rental	01/06/2022	Turo Acquires OuiCar and Expands into New Markets	LINK
Turo Car Rental	17/05/2022	Capital One & Turo partner to reward your travels	LINK
AlphaCity	15/06/2022	New responsibility at Alphabet International : Markus Deusing a	LINK
AlphaCity	15/06/2022	Next step is digitalising the fleet business - the new AlphaGuide	LINK
CityBee	30/06/2022	Mundus bridge finance fund 4 M.finances the development of th	LINK
CityBee	09/06/2022	Last year, Citybee's revenue in Lituania grew by 50% , reaching 4	LINK
Enjoy	23/05/2022	Eni's Enjoy fleet goes electric in the City of Turin with the arrival	LINK

Excel Data Points:
3,500+

Services Covered:
58+

Excel Tabs:
6

Excel Database Includes

618 - Mobility Services Guide

CASES

618EU-22-HY2 | Availability by Country

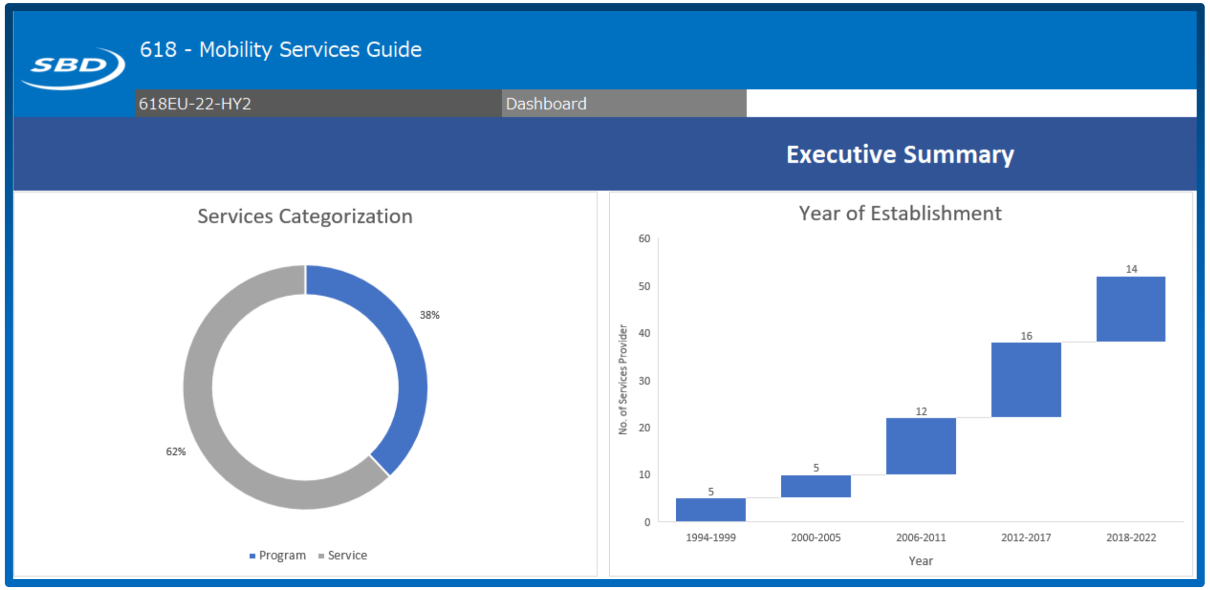
Service Name	AL	AD	AM	AT	AZ	BY	BE	BA	BG	HR	CY	CZ	DK	EE	FI	FR	GE	DE	GR	HU	IS
Ford Carsharing																		Y			
Zipcar																					Y
ZITY																Y					
Moia																	Y				
Marcel																Y					
Uber (Ride hailing), Uber X Share (Carpool)		Y		Y			Y		Y	Y		Y		Y	Y	Y		Y	Y		
GoMore				Y											Y						
HoppyGo												Y									
Smart "ready to"																Y	Y				
SnappCar													Y					Y			
Turo P2P																					
Turo Car Rental																					
BlaBlaCar										Y		Y				Y		Y		Y	
Leo & Go																Y					
Liftshare																					
Via																					
Audi on demand																		Y			
Citroen Rent&Smile				Y			Y									Y		Y			
Porsche Drive																Y		Y			
Google Maps	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Whim							Y								Y						

Excel Data Points:
3,500+

Services Covered:
58+

Excel Tabs:
6

Excel Database Includes



Excel Data Points:
3,500+

Services Covered:
58+

Excel Tabs:
6

Request the price

Request price

Contact SBD Automotive

Do you have any questions?

If you have any questions or feedback about this research report or SBD Automotive's consulting services, you can email us at info@sbdautomotive.com or discuss with your local account manager below.

info@sbdautomotive.com

Book a meeting

USA | UK | Germany | India | China | Japan

Garren Carr
North America
garrencarr@sbdautomotive.com
+1 734 619 7969

Luigi Bisbiglia
UK, South & West Europe
luigibisbiglia@sbdautomotive.com
+44 1908 305102

SBD China Sales Team
China
salesChina@sbdautomotive.com
+86 18516653761

Andrea Sroczynski
Germany, North & East Europe
andreasroczynski@sbdautomotive.com
+49 211 9753153-1

SBD Japan Sales Team
Japan, South Korea & Australia
postbox@sbdautomotive.com
+81 52 253 6201