



The corporate roadmap to **shared mobility**

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Corporations who emerge as early adopters in this space have the opportunity to awaken and monetize a sleeping cash-cow. Stationary grey fleets can become roaming carsharing services for both urban and employee operations. This has the potential to boost employee satisfaction, CSR credentials and the bottom line, all at the same time.

Shifting the paradigm

Frost & Sullivan predicts a more than three-fold increase in carsharing globally within the next five years. It has the potential to satisfy individualized transportation demands in a sustainable and socially beneficial way, by decreasing the demand for cars, lowering emissions, reducing traffic and parking congestion, and increasing social cohesion amongst sharers.

The biggest (and fastest) transformation can be seen with corporate fleets — the benefits are scaled and fleets are cycled more

quickly than for private consumers. However, legacy fleets and entrenched attitudes can remain a barrier. **The following sections contain three steps companies can follow to fully embrace the new paradigm.**



Step 1: Enable shared fleets

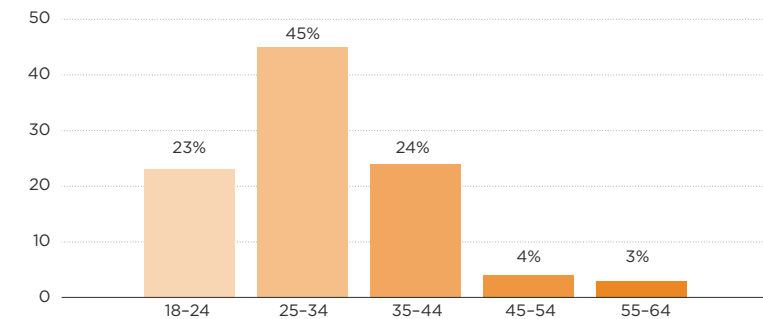
Corporate carsharing has emerged as a replacement for pool cars for many fleet managers, using the likes of Fleetster, Zipcar, and Enterprise Car Share. According to Morgan Stanley estimates, vehicles in carsharing fleets have the potential utilization rates of up to 50% a day, compared with 6%, or less than 90 minutes a day for single-user vehicles.

Both small and large business are primed to adopt and benefit from shared mobility models – for both people and freight. Uber Freight is a fast-growing part of the ridehailing giant, while local restaurants and retailers can already leverage the sharing model for everything from food delivery to business supplies, via Deliveroo, UberEats and GrubHub.

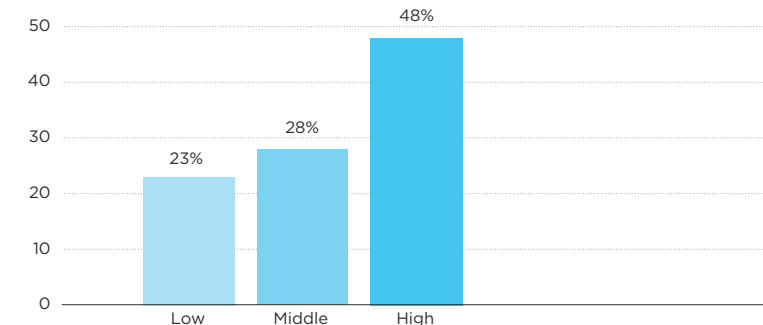
On-demand platforms for corporate enterprises also strategically position shared mobility as employee benefits. For the 18–34 age bracket, free or subsidized access to carsharing is an attractive offer as it is already part of their normal consumer behavior (Figure 4).

Figure 4
Demographics of carsharing users in the U.S.

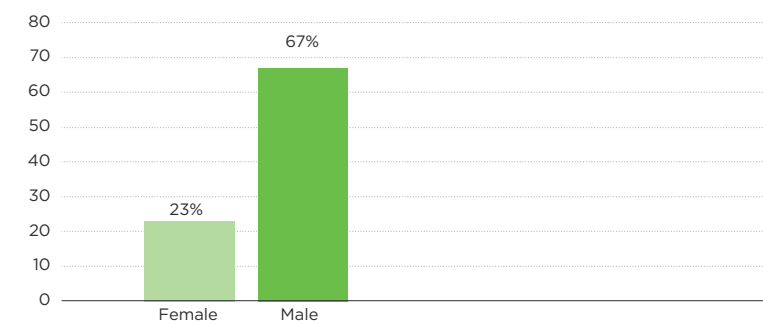
Users by age in the U.S.



Users by income¹ in the U.S.



Users by gender in the U.S.



¹Low income bottom 33% of households, medium income depicts mid 33% of households, high income depicts top 33% of households
"Which of these services have you booked online (website or app) in the past 12 months?"
Multi Pick Statement: "car sharing (short-time car rentals)"; India: n=325; the U.S. n=412
Source: Statista Global Consumer Survey, data from: June 2018

Source: Statista Global Consumer Survey 2018

Step 2: Enable shared drivers

Separating drivers from dedicated fleet vehicles may seem a daunting task, but reducing time wasted by one-driver-one-car processes makes for a promising business case. The average car sits unused for more than 90% of the time, carries barely more than one person, and costs \$8,500 a year to own and run. Each car occupies 150m² of urban land and thereby contributes to congestion — which costs the EU economy €100 billion annually. One US study indicates the global car fleet

could be reduced by a third if sharing schemes were widely adopted.

Similar benefits are available when switching a corporate pool or grey fleet to a shared electric fleet. **The corporate roadmap to shared mobility must therefore include getting employees accustomed to carsharing processes,** including digital, app or intranets system for drivers and employees to access and book their fleet vehicle.

Yesterday

1 : 1 Relation



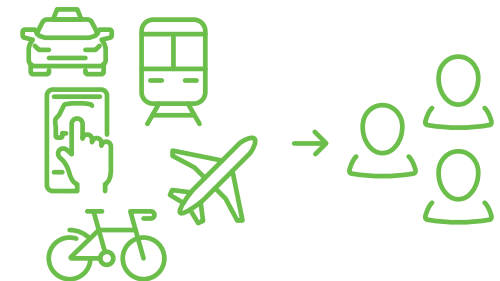
Today

1 : n Relation



Tomorrow

m : n Relation



Step 3: Enable new business models in mobility

Across Europe, integrated concepts that combine public transport, carsharing, ridehailing, and bikesharing into a monthly flat-rate are emerging under the banner of “mobility-as-a-service” (MaaS). With more millennials moving into cities, the concept is taking off as a business model.

MaaS aggregators are aiming to add every mode of transport in a city available in a single smartphone app. The “father” of mobility-as-a-service, Sampo Hietanen, has launched his multimodal subscription app, Whim, in Helsinki, Antwerpen, and the West Midlands in the UK. Citymapper, Moovel, Moovit, Cubic, Transit and the German MaaS application Jelbi all include multiple transport options and are vying to include payments across all of the modes. **A whole generation is more used to booking a ride via an app and jumping into shared transportation, than they are being at the steering wheel.**

This paves the way for full automation — the ultimate business model for ridehailing and automotive companies.



Public transport



Carsharing



Ridehailing



Bikesharing

About the authors

This white paper was developed as a collaboration between industry thought leaders.

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