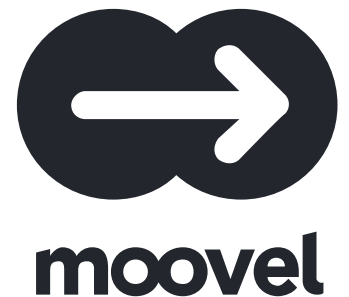


# Mobility of the future – Challenges for business travelers

ITB 2015

moovel GmbH  
Berlin, March 5, 2015



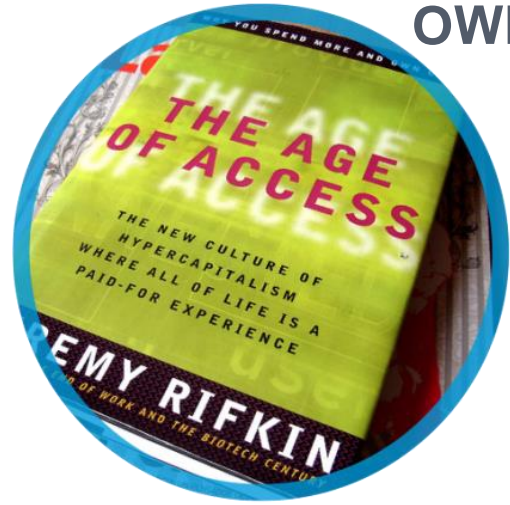
✓ Four mega trends influence the mobility model of the future



**URBANISATION**



**ALWAYS ON  
& CONNECTED**



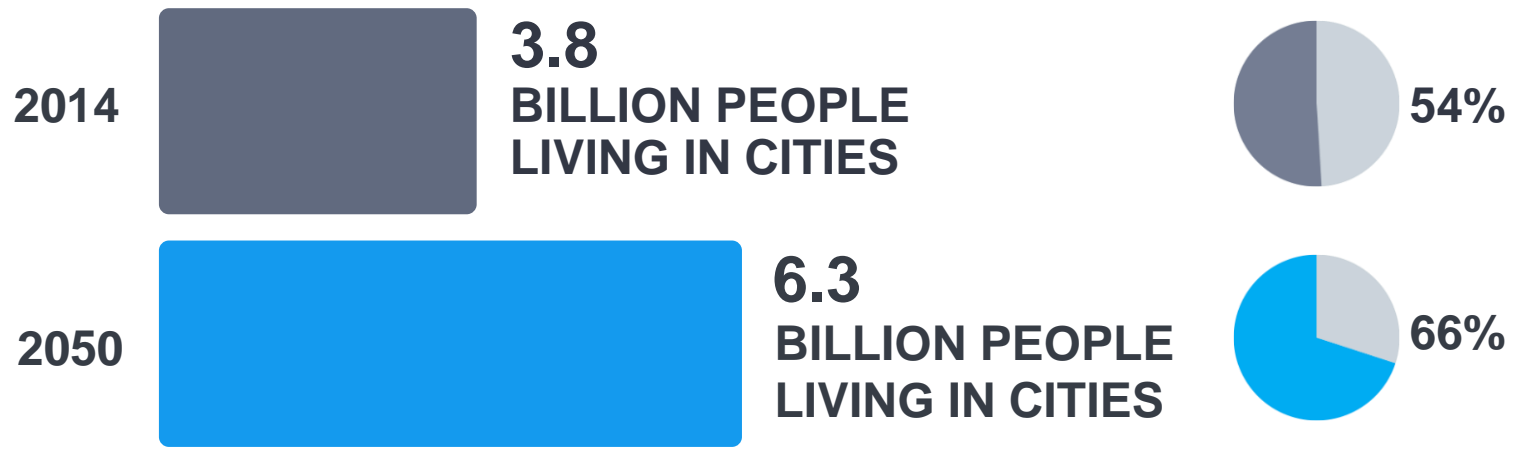
**ACCESS TRUMPS  
OWNERSHIP**



**AUTONOMOUS  
DRIVING**



## Urbanisation: Cities are growing worldwide

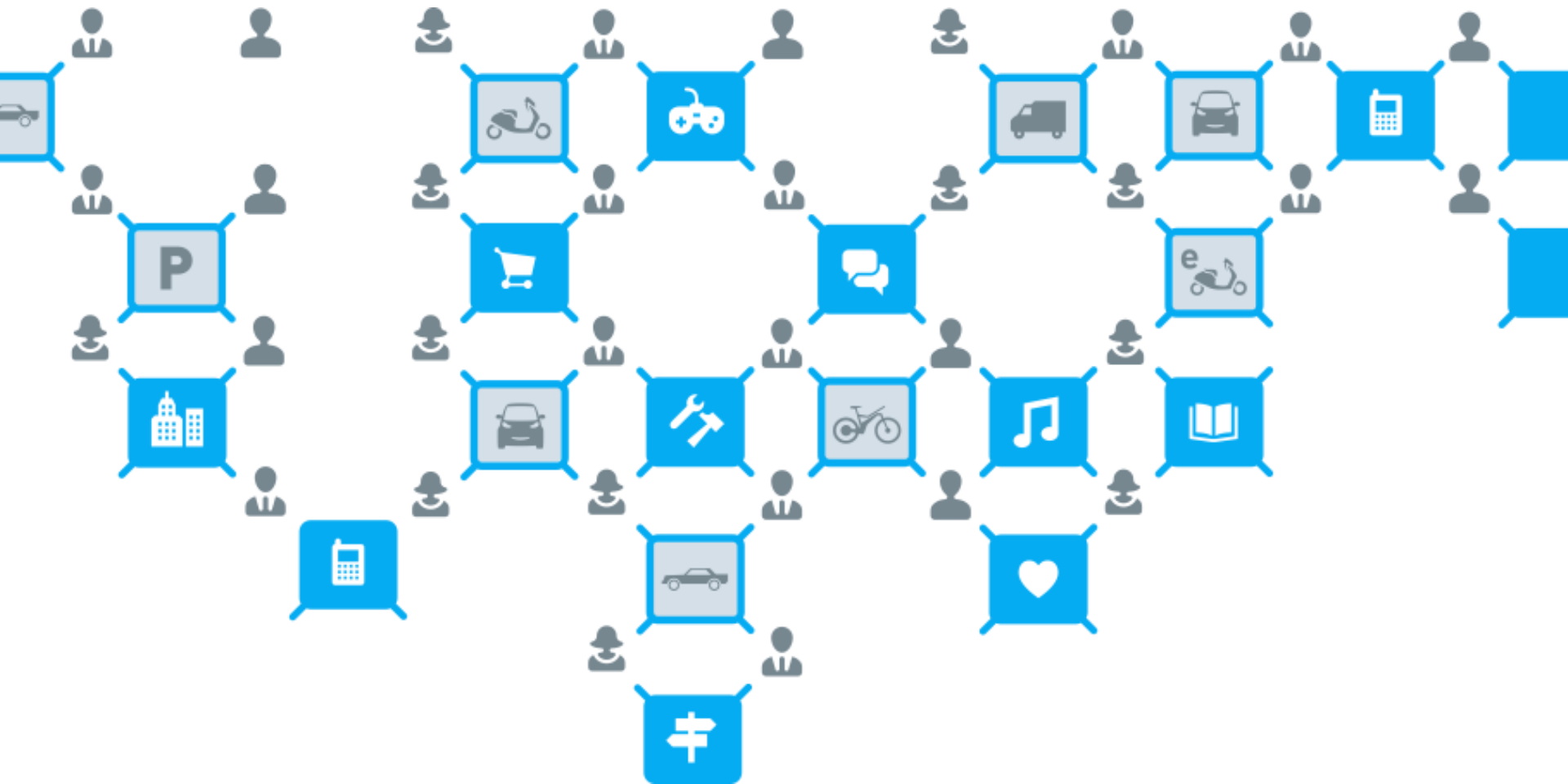


Source: United Nations

The urban infrastructure can not keep pace with this trend. Cities react with restrictions, shortages and price increases for individual mobility.



## Access trumps ownership: share, trade, borrow



We do not want to buy everything, but we want to have access to it. The internet opens up intelligent means of collaborative consumption – the more intelligent things become, the easier they can be shared.



## Autonomous driving will change mobility patterns



Autonomous driving will cause major changes all around us – the way we move, what life in the city will look like, how we shop and even how we interact as humans.

Always on & connected: Smartphones as the key to mobility



Source: Statista

Smartphones facilitate finding, booking and paying of suitable connections and offer access to mobility.



## ▼ Overarching trends encounter changing customer expectations

### Customer preferences

### Customer expectations

#### Flexibility

24/7 access to mobility

#### Simplicity

Simple model for booking, payment & ticketing  
One-stop shop services

#### Environmental consciousness

Affordable and attractive environmentally friendly solutions  
Alternative to having own car

#### Transparency

Pricing without hidden costs

✓ **Converging mega trends and changing customer behaviours impact the mobility of the future**



Urbanisation



Always on & Connected



Access trumps Ownership



Autonomous Driving

**Flexibility**

**Simplicity**

**Environmental consciousness**

**Transparency**



**Smartphone as key to mobility**

**Shared mobility**

**Integrated mobility platform**





## Our take on the future of mobility

Smartphone as  
key to mobility

Shared mobility

Integrated  
mobility platform





## Our take on the future of mobility

**Smartphone as  
key to mobility**

**Shared mobility**

**Integrated  
mobility platform**

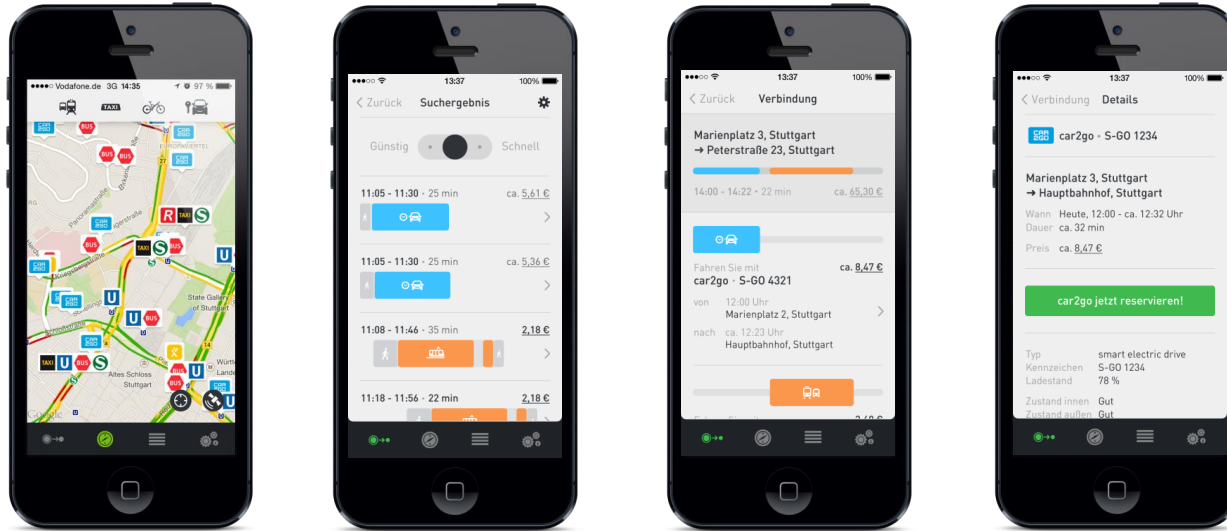




## Smartphone as key to mobility: Smartphone-based rental



# Smartphone as key to mobility: moovel app simplifying business trips



- **Simplify business trips:**  
Cashfree payment; Save time and money; All trips in one invoice
- **Transparency:**  
all means of transport at a glance
- **Sustainability:**  
moovel offers alternatives in mobility and supports ecological travelling
- **Door-to-door mobility:**  
moovel as universal tool of travel planning



▼ **Our take on the future of mobility**

**Smartphone as  
key to mobility**

**Shared mobility**

**Integrated  
mobility platform**



## Shared mobility: car2go



- Flexible rental locations
- One-way rentals (A to B)
- Flexibility in spontaneous trips in urban areas
- All inclusive: insurance, fuel, parking within business areas
- Per minute accounting or minute packages for business customers





# Shared mobility: car2go

8 COUNTRIES

BROOKLYN, N.Y.C.  
SAN DIEGO MIAMI AUSTIN  
VANCOUVER CALGARY  
SEATTLE COLUMBUS  
LOS ANGELES MINNEAPOLIS DENVER  
MONTREAL PORTLAND  
TORONTO  
WASHINGTON DC  
SOUTH BAY, L.A.

29 CITIES

DUESSELDORF  
AMSTERDAM ROME  
COPENHAGEN HAMBURG  
VIENNA FLORENCE  
STOCKHOLM COLOGNE  
STUTT GART MUNICH  
MILAN BERLIN  
FRANKFURT





## Our take on the future of mobility

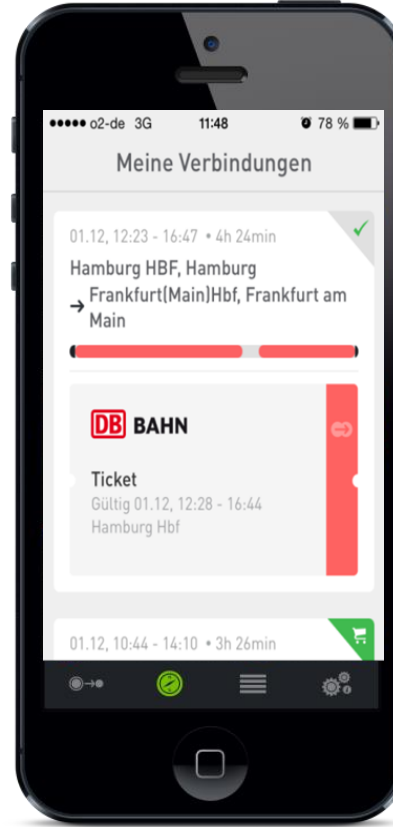
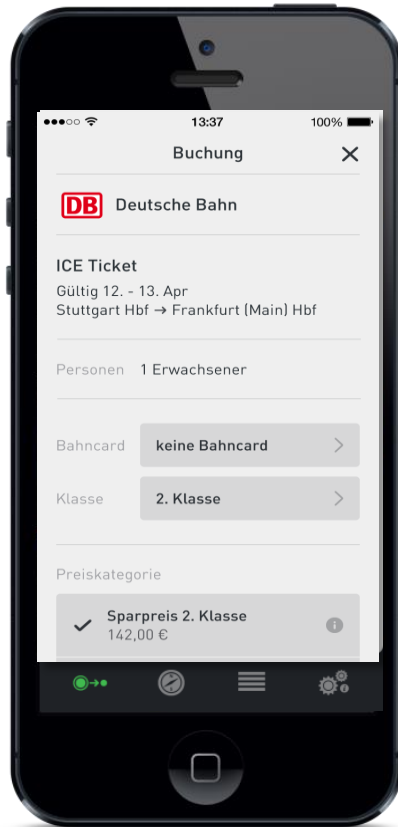
**Smartphone as  
key to mobility**

**Shared mobility**

**Integrated  
mobility platform**

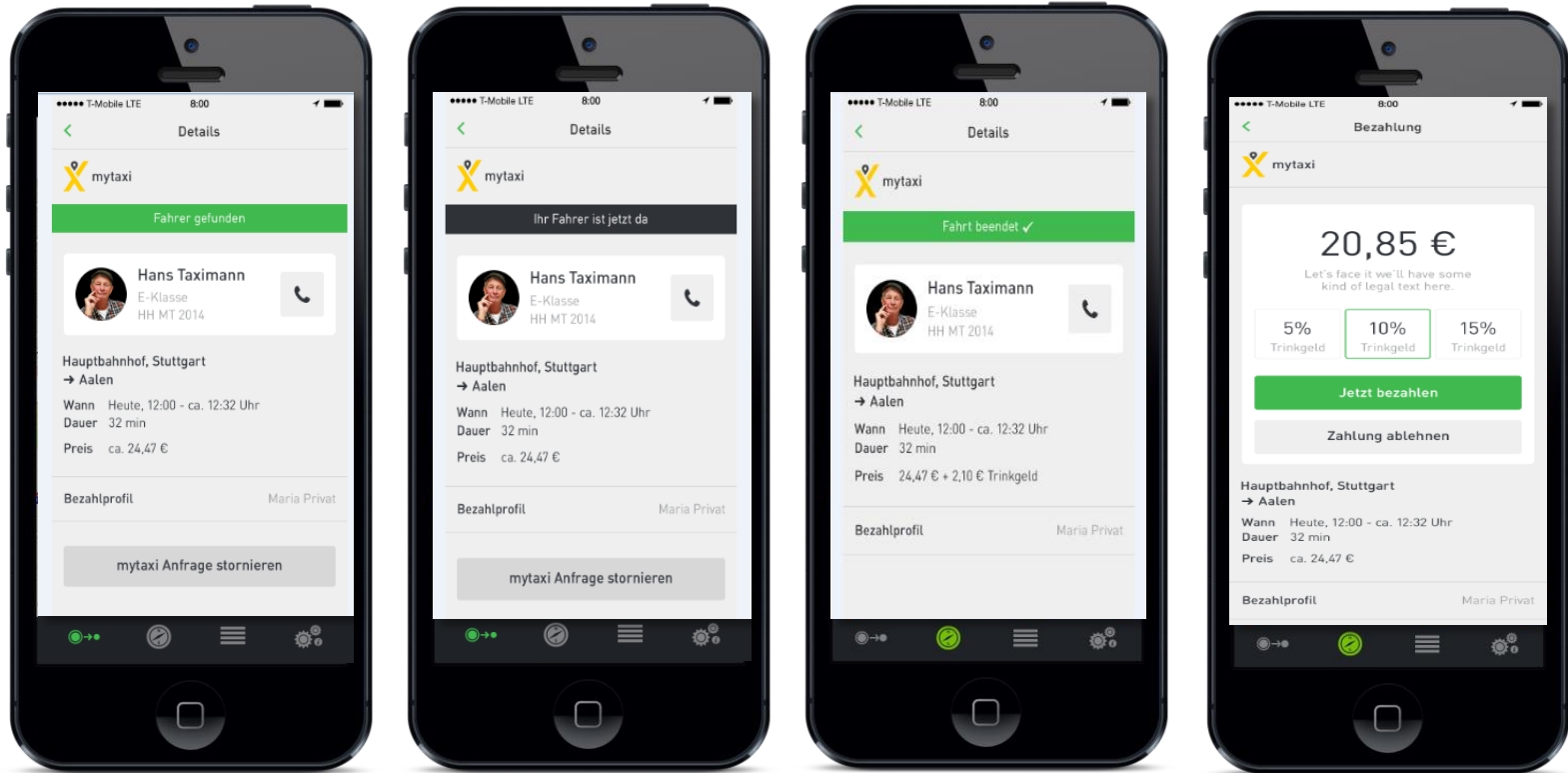


# Integrated mobility: moovel integration of Deutsche Bahn





## Integrated mobility: moovel integration of mytaxi



- mytaxi: Market leader in Europe with more than 45,000 taxis in 40 cities
- More than 10 million app downloads
- Booking and payment of the taxi within the app





## Business Travel is a EUR 1 trillion market



- China to surpass the US in business travel spending by 2016; business travel spending in China has grown from \$32 billion USD in 2000 to \$225 billion USD in 2013
- Asia Pacific is already the largest business travel region in the world (38%). Spending totaled \$392 billion USD in 2013 – more than doubling in size since 2000 (7.5% yoy growth); Forecast APAC spending to continue growing at a 10.2 percent annual pace over the next five years.
- By 2018, Asia Pacific will have gained another 5 percent in market share, while the US and Western Europe will lose three percent and two percent, respectively.

Source: GBTA Business Travel Index Report

GBTA report that Global Business Travel spending to rise from \$1.1 trillion to \$1.2 trillion in 2014, with US & China by far the largest markets.



4 hypotheses on mobility in 2020



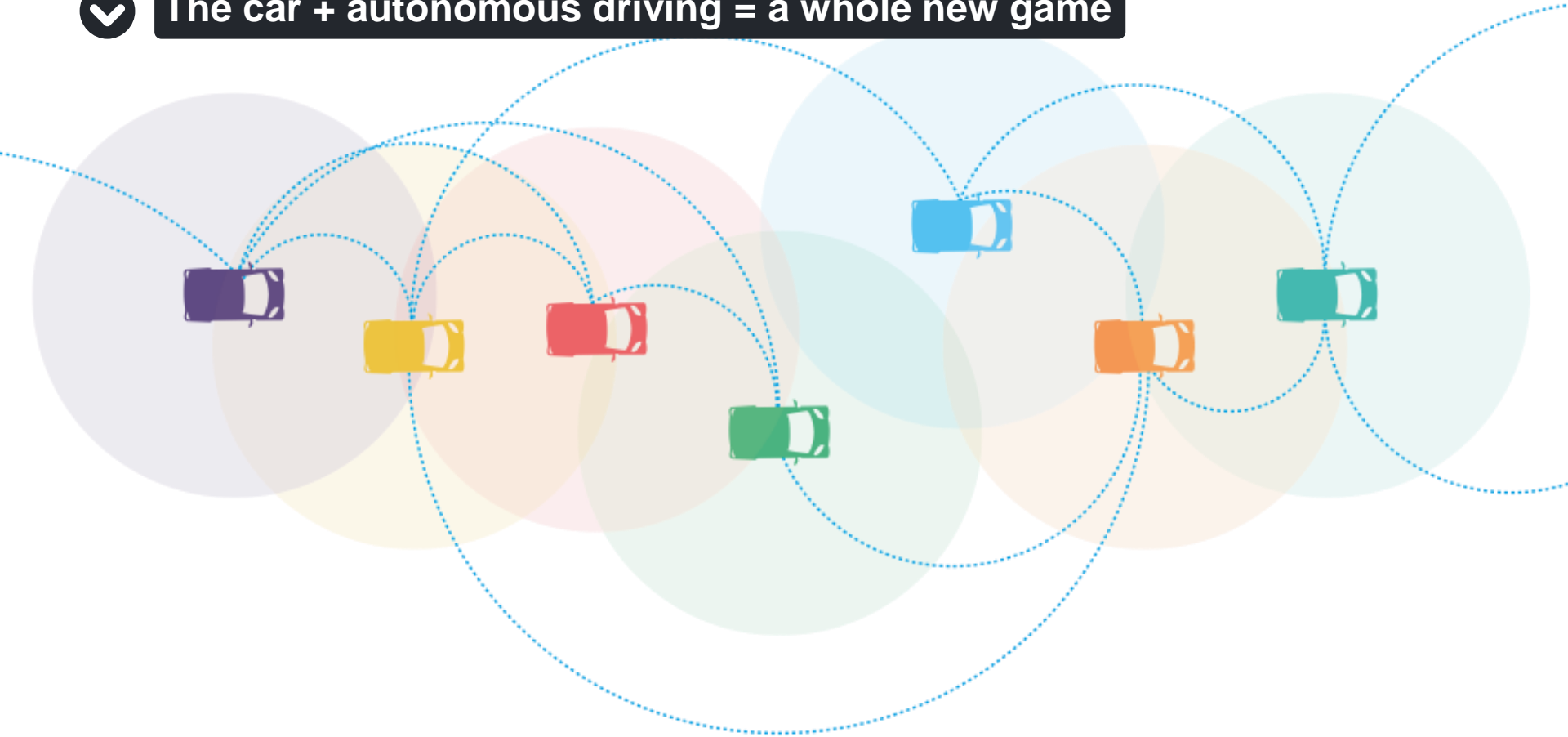


Smartphones serve as a “real-time mobility companion”



Features such as the calendar, navigation, mail, and messaging generate new value. Smartphone-based payment has become the norm.

▼ **The car + autonomous driving = a whole new game**



Self-driving vehicles will transform the car from an asset to a needed service. In the long term, the automotive value chain will be disrupted. Vehicle ownership, taxi, commercial transport, public transport and urban planning will be fundamentally reshaped.

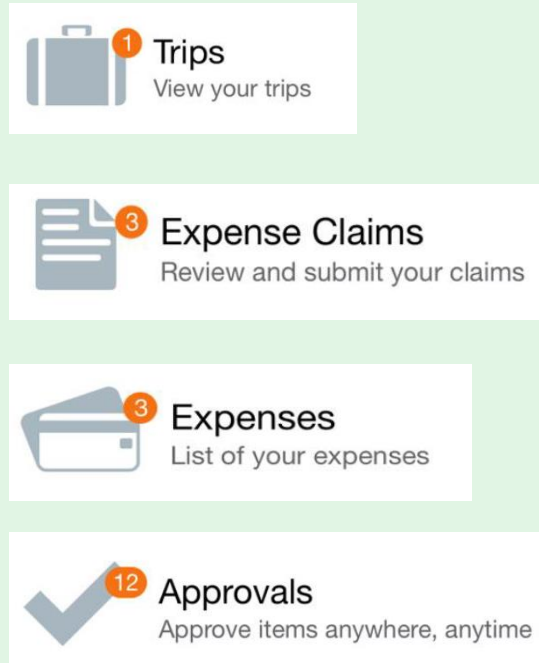
✓ Private life and job merge – even when it comes to mobility



Intelligent models enable you to use different mobility services on a high flexible level (flatrate). They give you the opportunity to switch comfortably between private und business use.



## Companies opting for self service corporate mobility



Source: Concur

Mobile tools for booking, approving and expensing corporate travel are improving organisational efficiency, and increase compliant trips of employees.



## What does that mean for business travelers in 2020?

1

### **One-stop-shop:**

We are going to see one global “one-stop-shop” mobility platform that incorporates all aspects from booking, payment to expense invoicing and reimbursement.

2

### **Predictive computing:**

There will be an intelligent mobility companion that guides business travelers proactively around traffic jams or flight delays and offers alternative mobility options in real-time.

3

### **Last mile:**

The “last mile” will be an integral part of the pre-travel booking process.

4

### **Quality standards:**

There will be mobility offers checked and certified through official quality programs as well as offers rated solely by customer reviews.



# Thank you!

Roland Keppler  
COO moovel Group