

WHO WILL WIN THE NEW MOBILITY RACE?

Summary - GBD's European new mobility survey 2016

The mobility market is shifting from product-based to service-based modes of business. Various start-ups, which offer a wide range of new mobility services, are surfacing. As a consequence, the new mobility market is becoming intransparent. Green Business Development (GBD) GmbH conducted an independent expert survey with the aim to bring more transparency into the new mobility market. In this study the term 'new mobility' is defined as carsharing, ridesharing, e-hailing, intermodal mobility services, parking services, and logistics services.

200+ MOBILITY EXPERTS **9** BUSINESS SECTORS **8** EUROPEAN COUNTRIES

“Cross-functional exchange within the European start-up scene is very important for the sustainable development of visions and ideas, as is the promotion of creative thinking and the attention paid to these. Without start-ups there will be slower development in Europe.”

- Alexander Schilff, Senior Consultant - Marketing Project Management, Toyota Deutschland GmbH, Cologne

“The new GBD European mobility survey makes it abundantly clear that the world of transportation is changing now, not in 2020. The major 'established' companies will need to collaborate with innovative start-ups. Everyone is searching for the next game changer.”

Lior Zeno Zamanski, EcoMotion Executive Director, Israel Innovation Institute

“From a US-based accelerator's perspective, we are seeing a strong trend towards open innovation activity in the Silicon Valley and are working closely with corporate partners. The country origin of new technologies or services is often irrelevant.”

- Max Gimpel-Henning, Director Western Regions, Cleantech Open, San Francisco

“This survey provides thoughtful insights into the future trends of mobility at the European level. We were glad to see that most experts consider that start-ups should cooperate with Public Transport Agencies, as it is in line with our own proposal.”

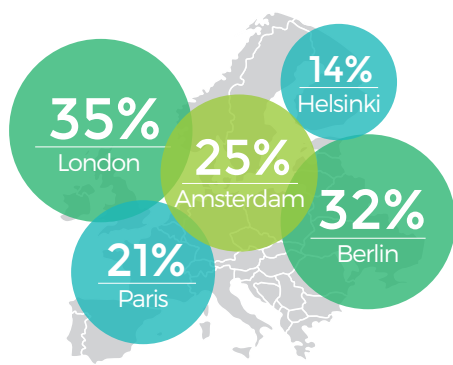
- Laura Brimont, Research Fellow New Prosperity, IDDRI - Science Po, Paris



GREEN BUSINESS DEVELOPMENT

1 New mobility hotspots in Europe.

n=173*



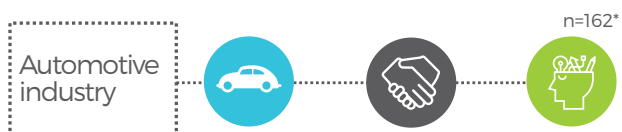
*Multiple responses allowed.

3 Cooperation with start-ups is crucial for public transport agencies (PTAs) and the automotive industry.



n=157*

- 90%** Experts agree that PTAs should extend cooperation and joint ventures with start-ups.
- 24%** Experts agree that PTAs should develop own new mobility services.



n=162*

- 78%** Experts agree that the automotive industry should extend cooperation and joint ventures with start-ups.
- 36%** Experts agree that the automotive industry should develop own new mobility services.

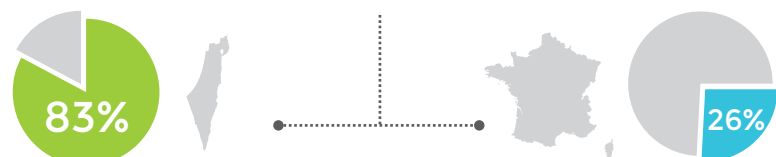
*Multiple responses allowed.

2 Majority demands liberal mobility legislation.

n=205

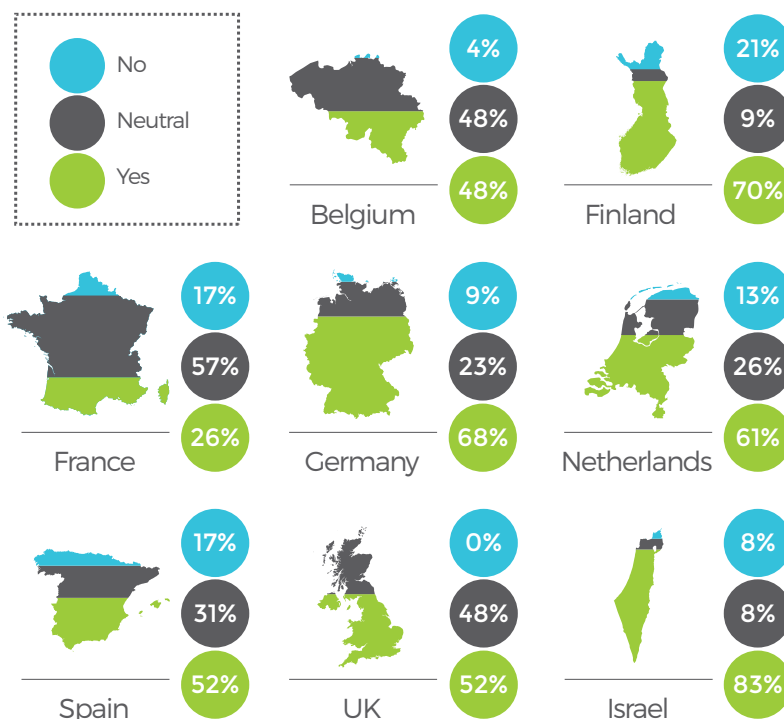


Experts largely agree that mobility legislation should be liberal.



Amongst Israeli experts, the call for liberal mobility legislation is the highest.

French experts are sceptical. Only a few would support liberal mobility legislation.



4 Cities first!

n=161*



Experts agree that in the future, new mobility start-ups will focus primarily on cities.

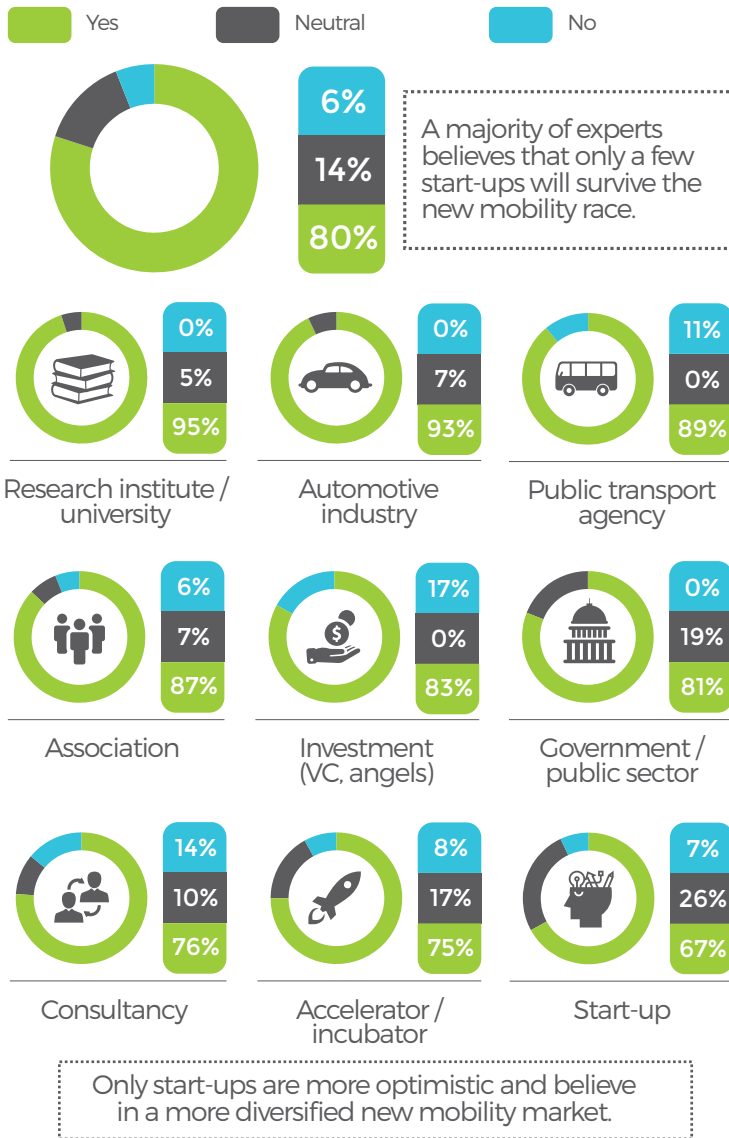


Nevertheless, a majority of start-ups also considers rural areas to be a niche market.

*Multiple responses allowed.

6 Only a few start-ups will survive the new mobility race.

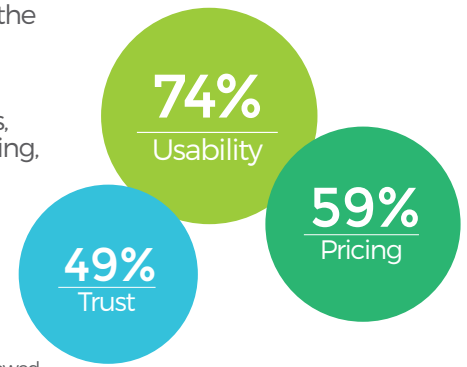
n=165



5 It's all about usability!

n=178*

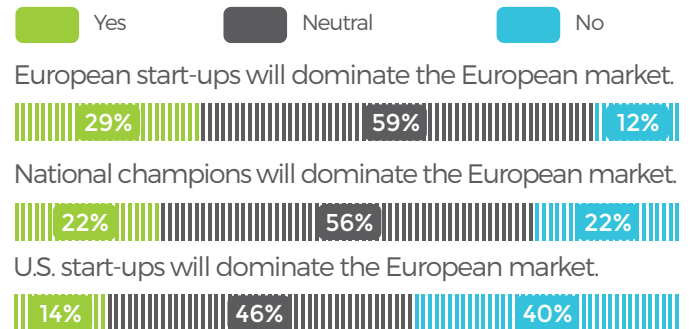
Usability marks the most important criterion for the success of new mobility services, followed by pricing, and trust.



*Multiple responses allowed.

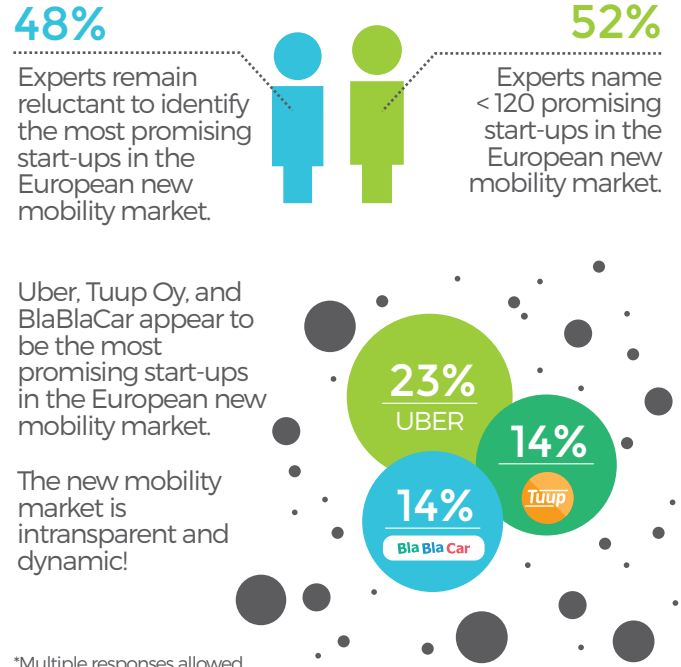
7 European new mobility start-ups ahead of U.S. competitors.

n=163



8 Lacking transparency regarding who will lead the new mobility race.

n=206*



*Multiple responses allowed.

[CLICK HERE FOR MORE INFORMATION*](#)

- Are you interested in a regular update on the new mobility start-up market?
- Are you interested to stay connected and exchange information in a European new mobility network?

* or visit 'publications' on www.gbd.green

Green Business Development (GBD) GmbH is one of the leading consultancies in the area of green business development in Germany. With our expertise, we help corporations, start-ups, and ventures build up innovation and growth at the interface between green economy and digital economy. Our services comprise research & strategy, business development, start-up monitoring, as well as expansion and market entry advisory into Germany. We are active in the fields of new mobility, sustainable consumption, alternative finance, and cleantech.

