

# Future of Mobility – Customer Feedback

## INTRODUCTION

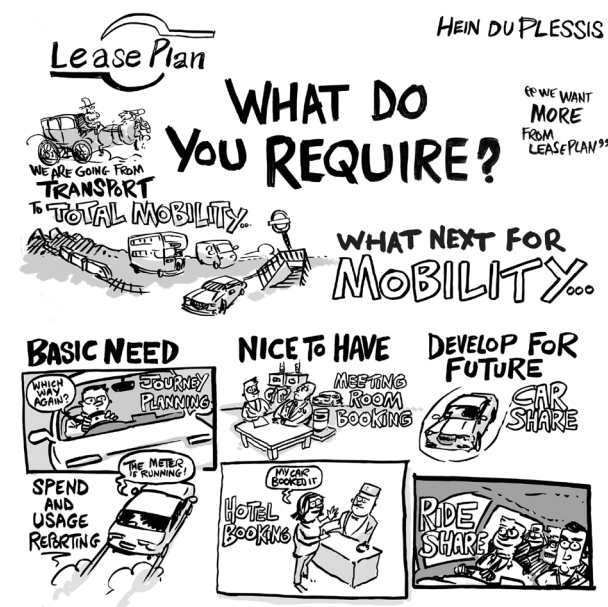
The media is rife with reports of disruptive technology, investment, and new entrants offering a range of mobility related solutions. According to reports, the vast majority of manufacturers have already invested in the sharing economy and the development of autonomous vehicles. Invariably, this will make the sharing of vehicles far more cost effective and practical in the future.

Whilst the “mobility trend” has been widely adopted by consumers in urban locations, there still remains the question of how Mobility as a Service (MaaS) will become practical and more widely adopted amongst corporate employers and employees. The fact remains that the corporate sector is both rural and urban based, which creates different challenges in adopting MaaS – add to this the fact that the company car is still a key element of a typical benefits package and understandably corporates are more reluctant to change.

For the past 10 years, LeasePlan has been leading the MaaS sector, investing in the creation of Mobility Mix in the Netherlands, who now have more than 100,000 active mobility cards used to pay for different transport modes. We have also recently launched a car-sharing pilot in the UK (SwopCar) that’s designed specifically for the corporate sector and corporate pool-car users.

We recognise that our customers still want to see more from us in relation to the provision of MaaS. For this reason, we have engaged in a detailed “Voice of the Customer” programme aimed at better understanding current and future requirements.

This publication is a summary of initial feedback received and whilst not representative of our overall client base, provides us some good insight into potential requirements. We would like to thank each and every customer that attended the event and provided input.



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## VOICE OF THE CUSTOMER

The feedback received showed a clear divide, with different needs reflected. Customers who operate fleets below 300 vehicles and are situated in rural locations had no immediate interest or mobility requirements.

Whereas larger organisations, situated in urban locations, have employees with different transport requirements and a clear need for solutions to be developed.

We requested that our customers define their immediate requirements (**Must Have**), medium term requirements (**Nice to Have**) and future requirements (**Develop in Future**).

As you will see from the tables on the next page, there appears to be a very specific requirement in regards to consolidation of billing, reporting on different transport modes, and the ability to access various transport modes from a single supplier.

This feedback directly supports external research which indicates that 1 in 5 Fleet Manager roles will evolve in the next 3-5 years to become Mobility Manager roles, effectively overseeing all travel and fleet costs under one department or control point.



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## MOBILITY – “MUST HAVE”

Strong/immediate interest shown across most customer groups for the following MaaS products.

PRODUCT NEEDS EXPRESSED - NOW
Consolidated billing across all transport and travel modes – i.e. one supplier
Spend and usage reporting by cost centre and individual across all transport/travel modes
Access to tube/train – one booking/payment/reporting platform
Access to rental cars – one booking/ payment/reporting platform
Access to taxis - one booking/payment/ reporting platform
Journey planning/booking platform that allows cost minimisation

## MOBILITY – “NICE TO HAVE”

Interest shown by some customers/groups and a willingness to consider/pay for these MaaS products in the near future.

PRODUCT NEEDS EXPRESSED - NEAR FUTURE
Expense claims management - integration of 3rd party suppliers by one supplier
Mobility – card-less online payment capability
Access to meeting room booking – one booking/ payment and reporting platform
Access to hotel booking – one booking/ payment and reporting platform
Access to car parking booking - one booking/ payment and reporting platform

## MOBILITY – “DEVELOP FOR FUTURE”

Interest shown by some customers/groups, but no immediate requirement.

PRODUCT NEEDS EXPRESSED - FUTURE
Car sharing – A to B model
Real-time traffic information at point of planning/ booking
Mobility as Salary Sacrifice arrangement
Car sharing - national access
Car share - personal use benefit with the ability to report BIK/ P11D for all private use

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## CONCLUSION

Interestingly, whilst our larger client base is very interested in car-sharing, the feedback from this group of customers was that they are not ready to adopt car-sharing as a service just yet, preferring instead to see further development before they adopt.

There is however a clear and immediate demand for LeasePlan to develop an integrated system/platform that would offer planning, booking, payment and consolidated reporting across other transport modes. In particular, customers would be interested in LeasePlan expanding its service offering to cover other basic transport modes, such as trains, tubes, taxis and rental cars on a single platform.

The feedback received will assist greatly in planning our development pipeline. We hope to gain further feedback and input from our customers as we develop and test some of these services over the next 18 months. We endeavour to provide a detailed update of our progress at next year's customer event.

If you would like to discuss these topics further, or would like to discuss your requirements in more detail during a 1-2-1 session, please contact your Account Director or Account Manager.



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