

MOBILITY

INDUSTRY

INSIDER

Q1 2020 | Pulse  
**Mobility Business Models**

# WHAT'S INSIDE!

In Q1-2020 pulse we have analyzed 103 passenger mobility service provider startups whose funding is disclosed out of 178 in our Insider portal by business model and region in M(\$)

Each business model is analyzed separately based on funding available in each startup from incorporation to Q1 2020 and is categorized by funding received before 2019, in 2019, and Q1-2020. Major business model is considered of each startup at the time of categorization

Below are the 8 business model considered for funding analysis

- Ride-hailing
- Carpooling
- Leasing/subscription
- AMOD
- P2P Car-sharing
- B2C Car-sharing
- Software platforms for mobility services
- Integrated Mobility

Section number	Business model & Rankings	Region & Rankings	Asia,1	North America,2	Europe,3	Africa,4	Australia,5	South America,6	Total Funding in descending order M(\$)	Total startups in each business model	Top player in each business model	HQ country of top player	Funding received by top player in each business model M(\$)	Region of Top player
<u>3</u>	Ride-hailing,1		39575.9	31754.2	35.0	10.0	10.0	0.2	71385.2	29	Uber	USA	26000	North America
<u>2</u>	Carpooling,2		60.1	983.3	1011.2	77.2	1.0		2132.8	41	Via	USA	587.1	North America
<u>6</u>	Leasing/subscription,3			2102.4	9.8				2112.1	4	Fair	USA	2101	North America
<u>6</u>	AMOD,4			1577.3					1577.3	4	Pony.ai	USA	726	North America
<u>4</u>	P2P Car-sharing,5		13.8	876.3	14.5				904.5	11	Turo	USA	467.4	North America
<u>5</u>	B2C Car-sharing,6		381.5	6.5	122.0		5.0	1.4	516.4	10	SoCar	South Korea	167	Asia
<u>6</u>	Software platforms for mobility services,7			73.8				0.1	73.9	2	Ridecell	USA	73.8	North America
<u>6</u>	Integrated Mobility,8				28.5				28.5	2	Splyt	UK	14.5	Europe
<u>1</u>	Total Funding in descending order M(\$)		40031.2	37373.8	1220.8	87.2	16.0	1.8	78730.8					
	Total startups in each region		27	42	24	4	3	3		103				
	Top player in each region		Didi Chuxing	Uber	Cabify	Swvl	goCatch	Zazcar						
	HQ country of top player		China	USA	Spain	Egypt	Australia	Brazil						
	Funding received by top player in each region M(\$)		21200.0	26000.0	477.0	76.5	10.0	1.4						
	Business model of top player		Ride-hailing	Ride-hailing	Carpooling	Carpooling	Ride-hailing	B2C Car-sharing						

**Executive funding analysis summary of all 103 passenger mobility service provider startups whose funding is disclosed out of 178 in our Insider portal by business model and region in M(\$)**

## 01

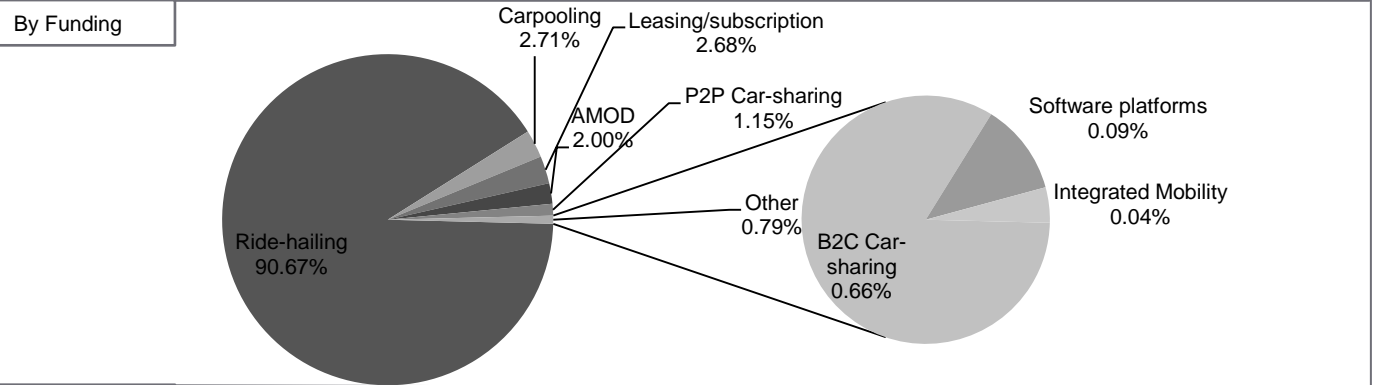
**Overall funding analysis of 103 startups out of 178(Insider portal) in passenger mobility services whose funding is disclosed from incorporation to Q1-2020**

# Mobility Business Models | Q1 2020 Pulse

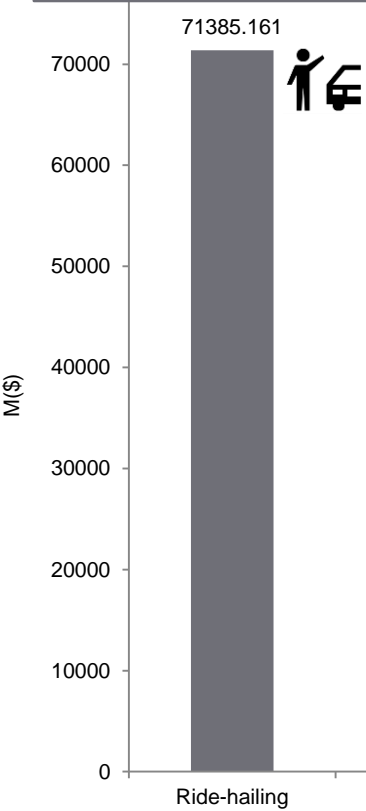
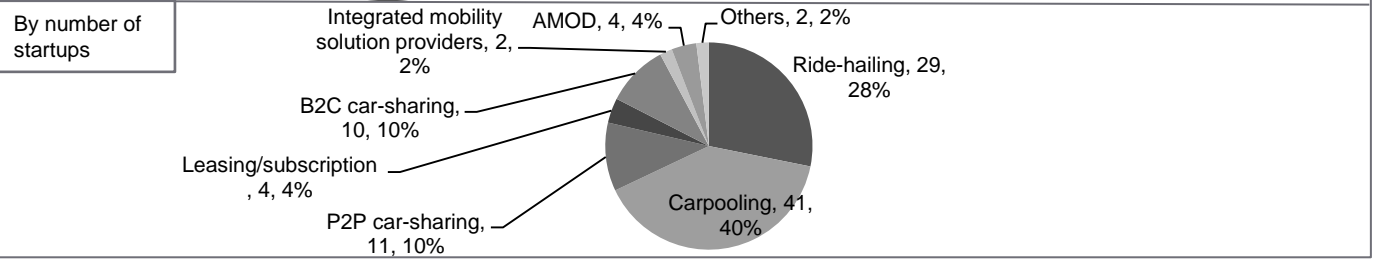
Funding analysis of all 103 passenger mobility service provider startups out of 178 in our Insider portal by business model in M(\$)

Funding analysis of all 103 passenger mobility service provider startups out of 178 in our Insider portal by business model in percentage

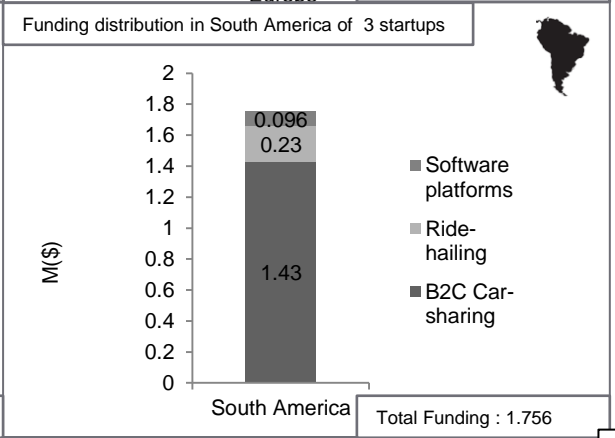
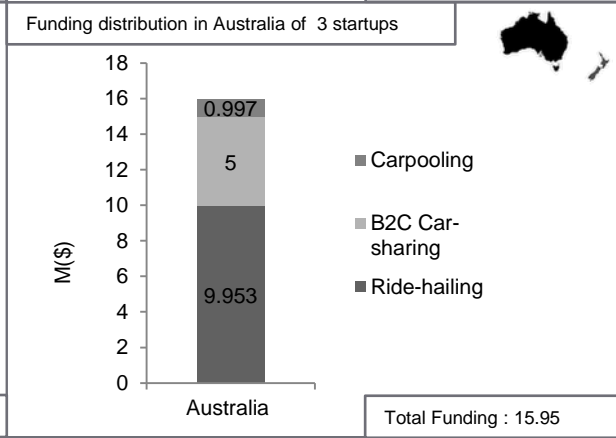
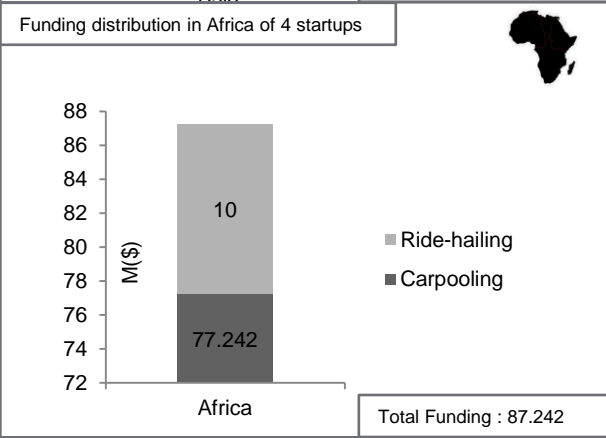
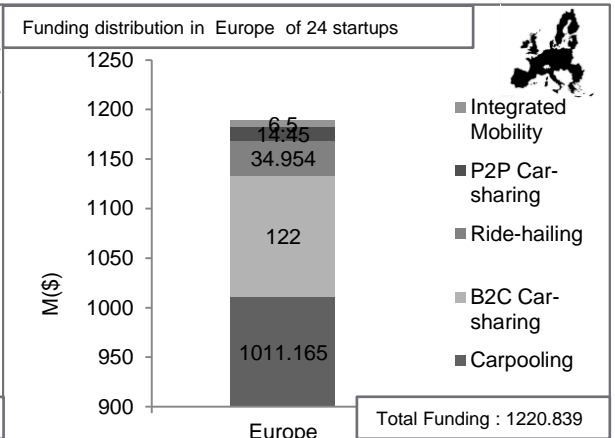
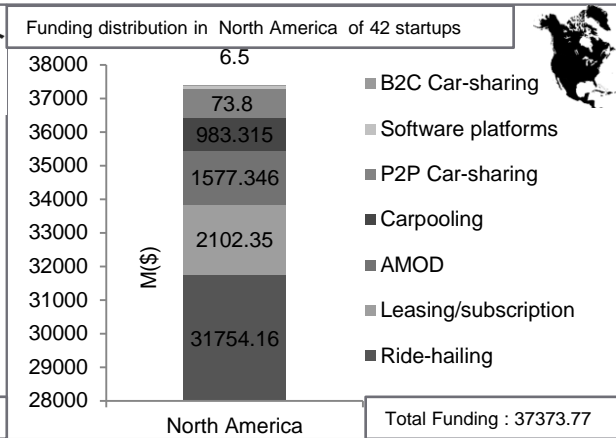
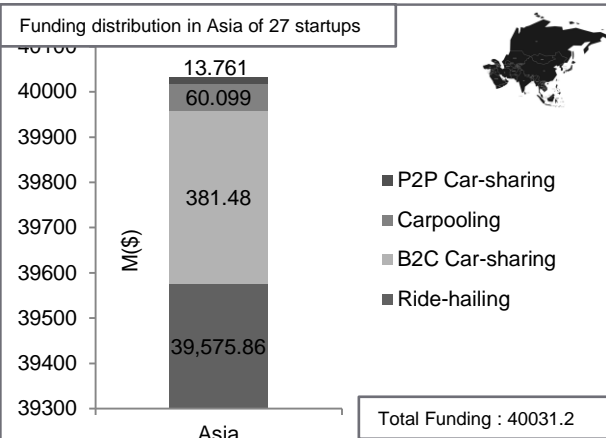
By Funding



By number of startups



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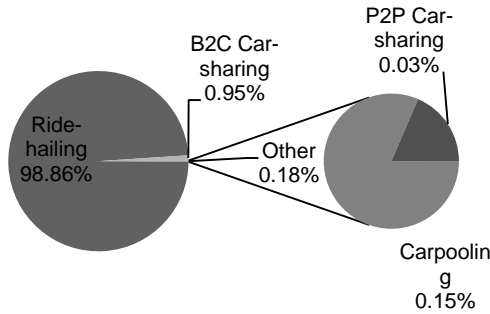


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Funding distribution in Asia of 27 startups in percentage



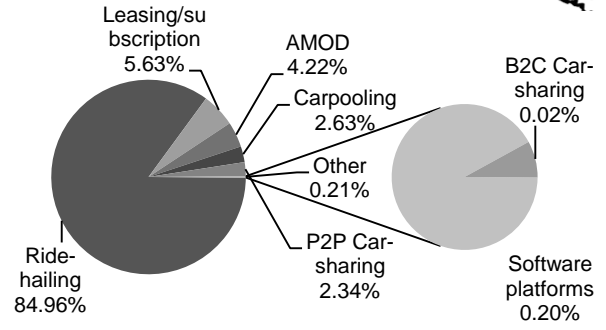
## Asia



Funding distribution in North America of 42 startups in percentage



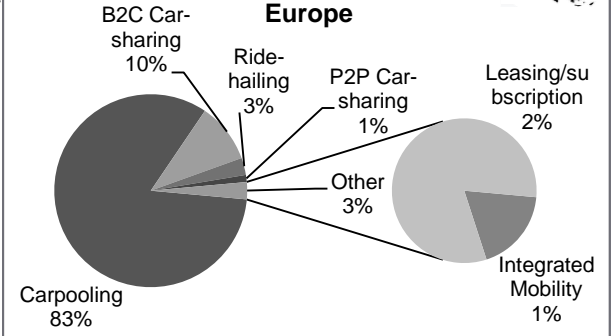
## North America



Funding distribution in Europe of 24 startups in percentage



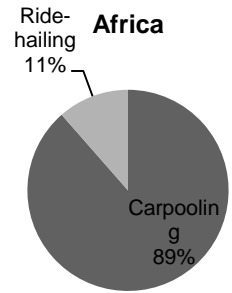
## Europe



Funding distribution in Africa of 4 startups in percentage



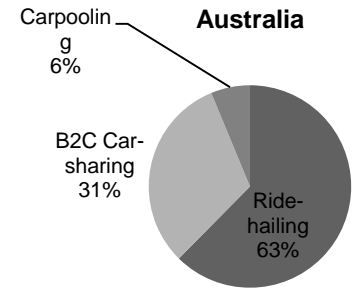
## Africa



Funding distribution in Australia of 3 startups in percentage



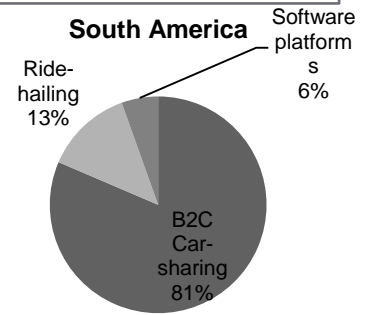
## Australia



Funding distribution in South America of 3 startups in percentage


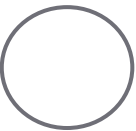





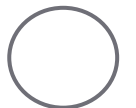












## South America



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Summary of all 103 startups in passenger mobility services analyzed by FutureBridge in terms of funding

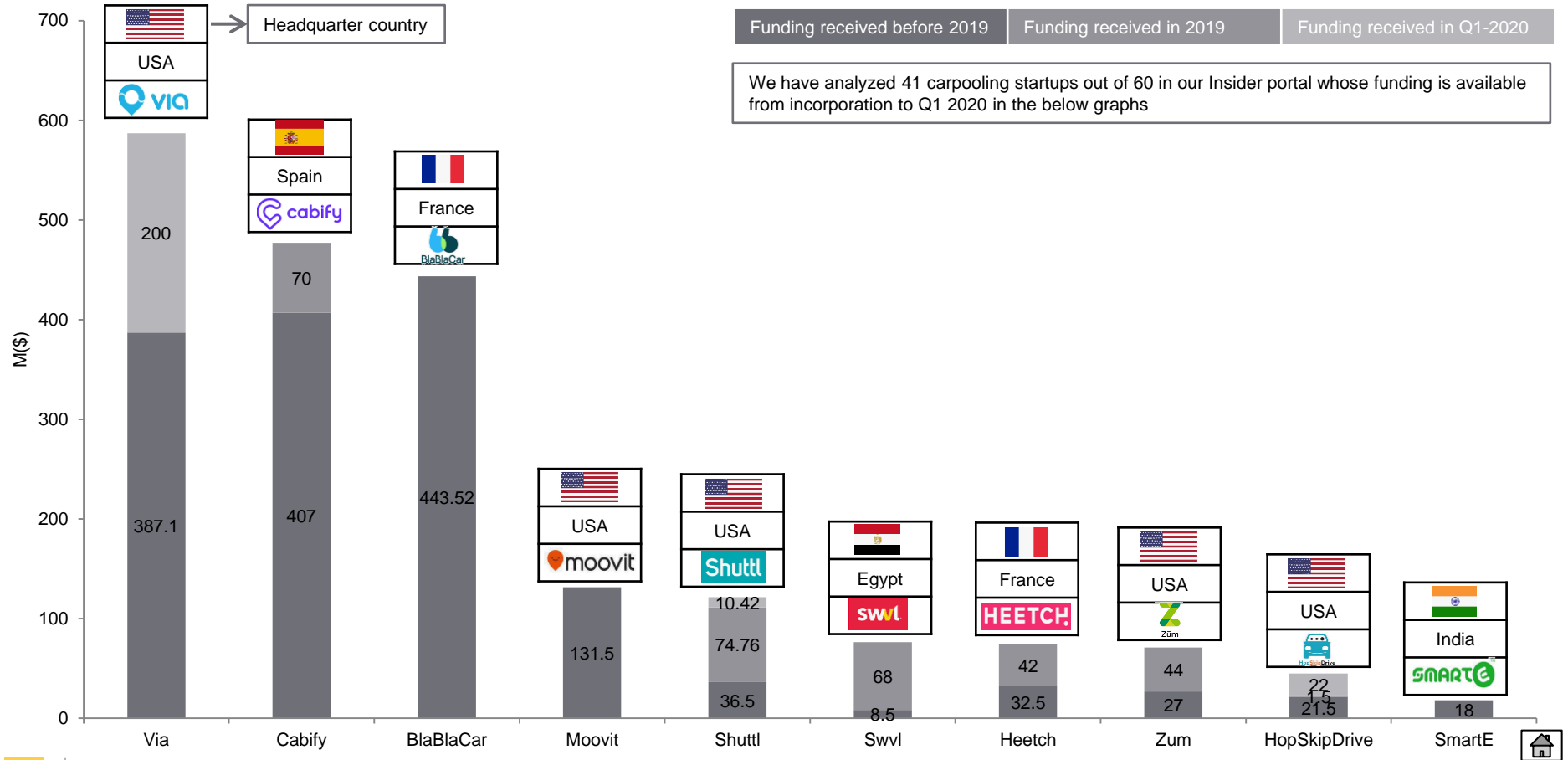
<p>Top 3 business model analyzed after studying 103 startups funding distribution from incorporation to Q1 2020</p>	<p>Ride-hailing</p>   <p>71385.161 M(\$)</p>	<p>Carpooling</p>   <p>2132.818 M(\$)</p>	<p>Leasing/subscription</p>   <p>2112.12 M(\$)</p>	<p>COVID-19 impact on each business model in <b>passenger mobility services</b> and new emerging business model's 😞 Very bad 😐 Bad 😊 Good</p>																						
<p>Top 3 regions from where most of the funding is happening based on startup headquarter location</p>	<p>Asia</p>   <p>40031.2 M(\$)</p>	<p>North America</p>   <p>37373.77 M(\$)</p>	<p>Europe</p>   <p>1220.839 M(\$)</p>	<table border="1"> <thead> <tr> <th>Business model</th> <th>Comparative Impact</th> </tr> </thead> <tbody> <tr> <td>Carpooling</td> <td>😞</td> </tr> <tr> <td>P2P car-sharing</td> <td>😞</td> </tr> <tr> <td>B2C car-sharing</td> <td>😞</td> </tr> <tr> <td>Software platform's for car-sharing</td> <td>😞</td> </tr> <tr> <td>Ride-hailing</td> <td>😞</td> </tr> <tr> <td>Integrated mobility</td> <td>😞</td> </tr> <tr> <td>AMOD</td> <td>😊</td> </tr> <tr> <td>Leasing/Subscription</td> <td>😊</td> </tr> <tr> <td>Online new car sell</td> <td>😊</td> </tr> <tr> <td>Second-hand car sale</td> <td>😊</td> </tr> </tbody> </table>	Business model	Comparative Impact	Carpooling	😞	P2P car-sharing	😞	B2C car-sharing	😞	Software platform's for car-sharing	😞	Ride-hailing	😞	Integrated mobility	😞	AMOD	😊	Leasing/Subscription	😊	Online new car sell	😊	Second-hand car sale	😊
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AMOD	😊																									
Leasing/Subscription	😊																									
Online new car sell	😊																									
Second-hand car sale	😊																									
<p>Top 3 business model's which have received funding from 2019 to Q1-2020</p>	<p>Ride-hailing</p>   <p>6270.1 M(\$)</p>	<p>AMOD</p>   <p>1212 M(\$)</p>	<p>Leasing/subscription</p>   <p>658.335 M(\$)</p>																							

# 02

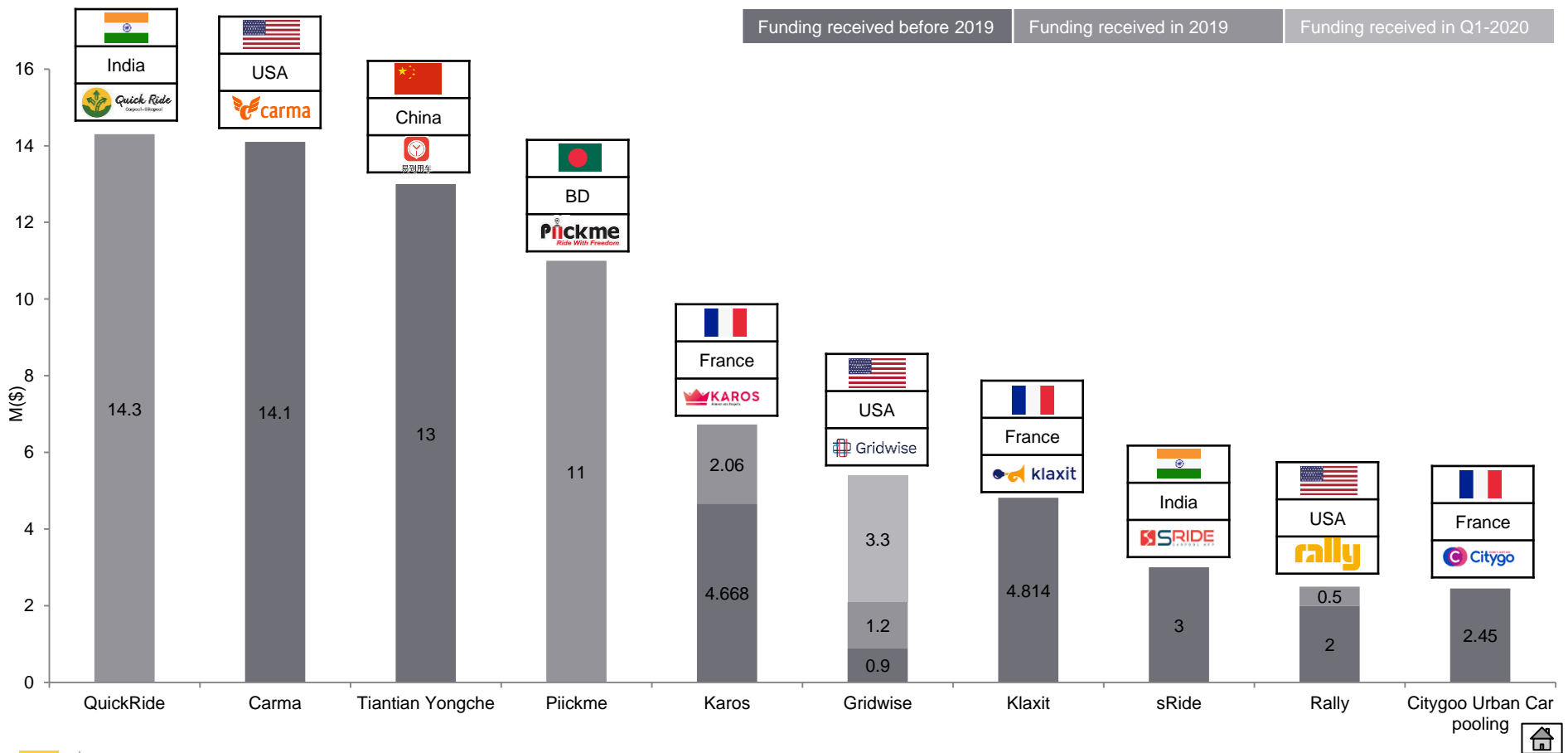
# Carpooling startups



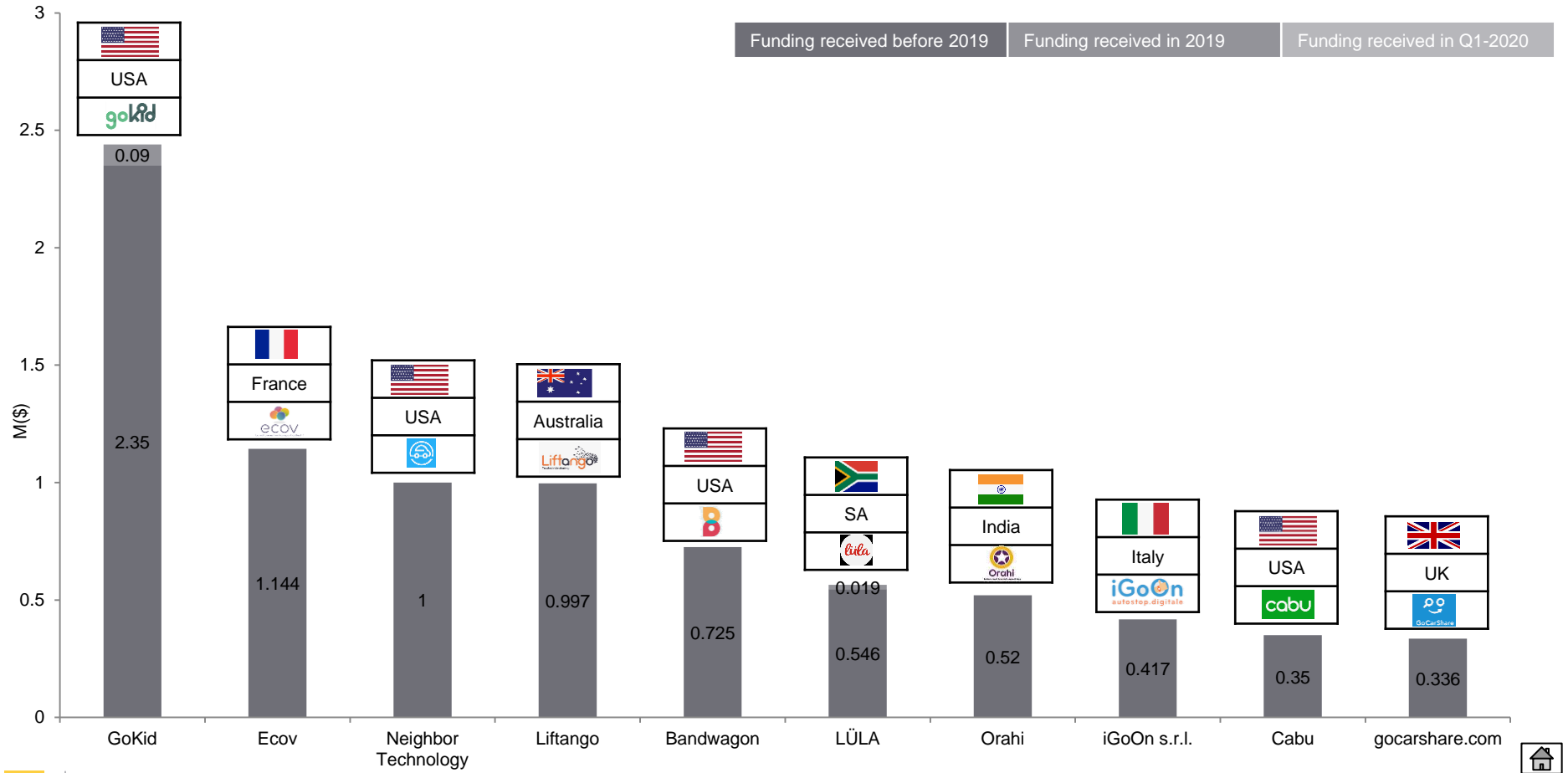
# Carpooling startups funding available from incorporation to Q1 2020 (1-10 out of 41 in descending order)



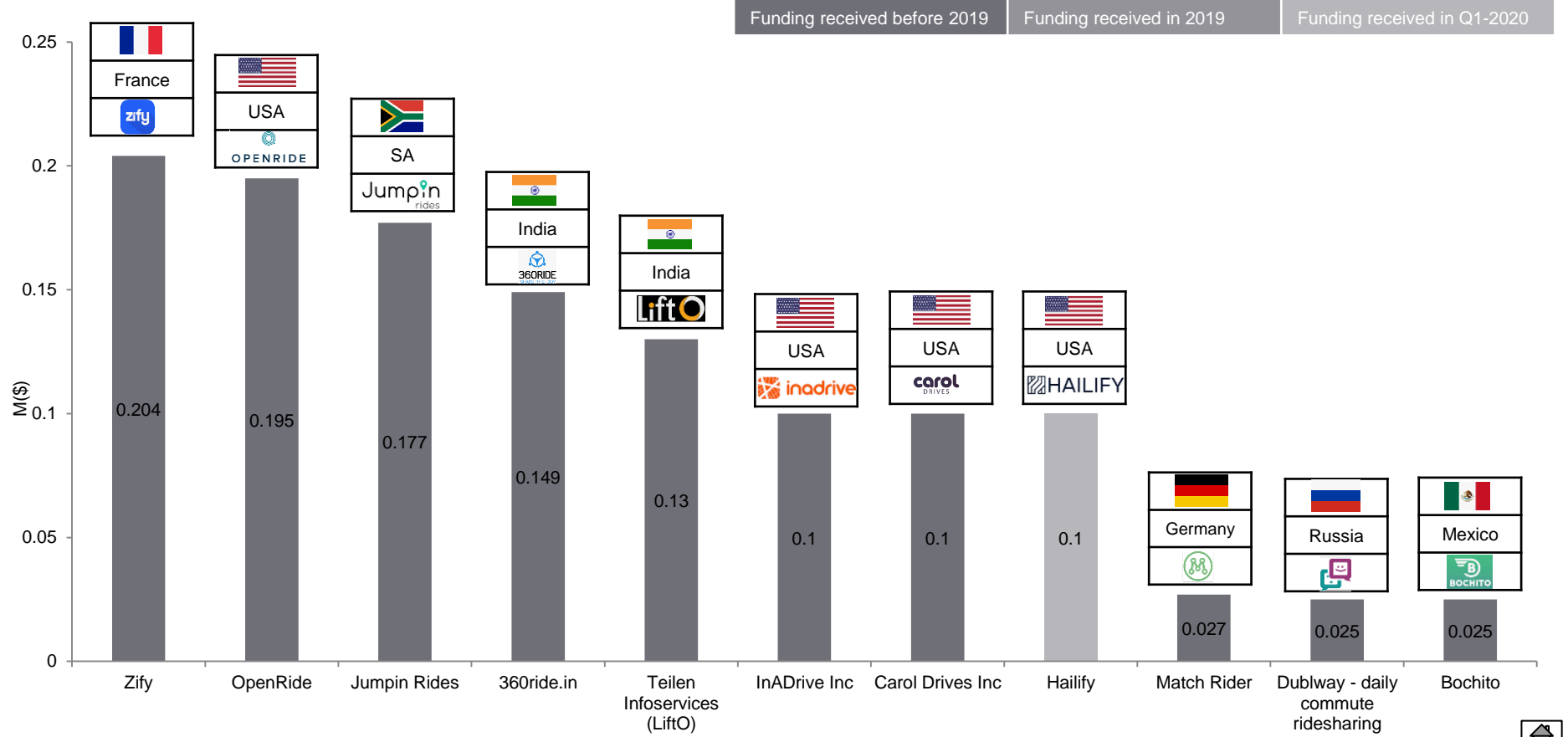
# Carpooling startups funding available from incorporation to Q1 2020 (11-20 out of 41 in descending order)



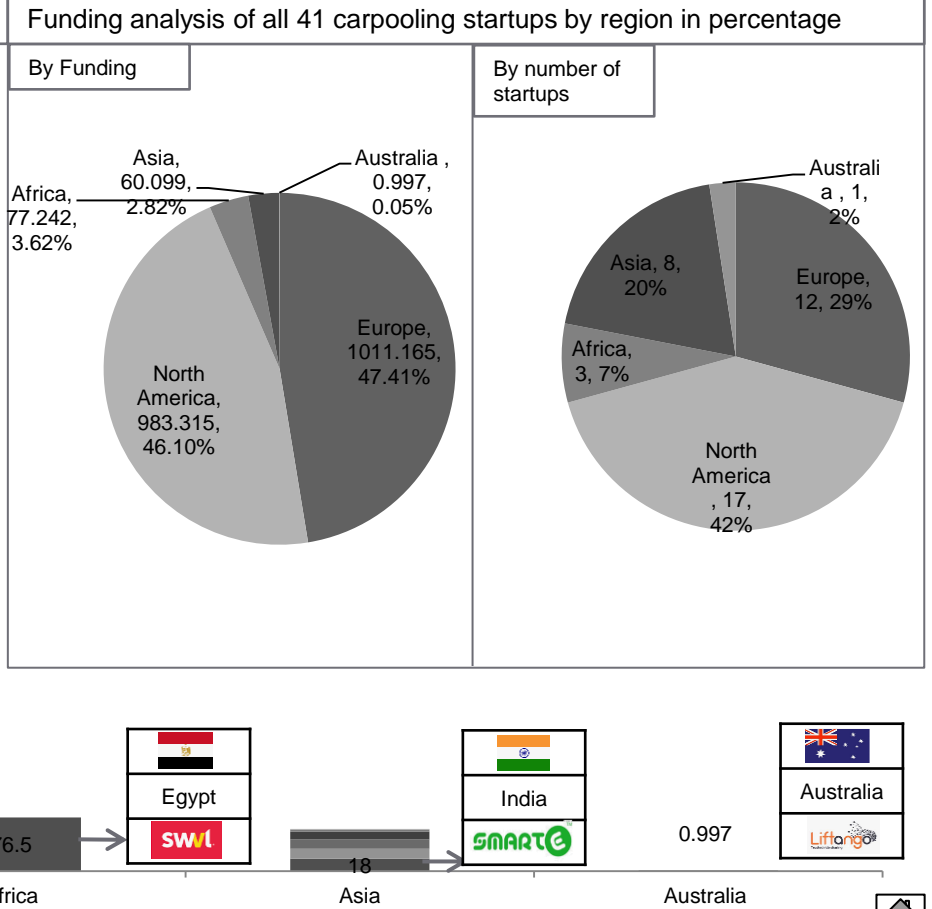
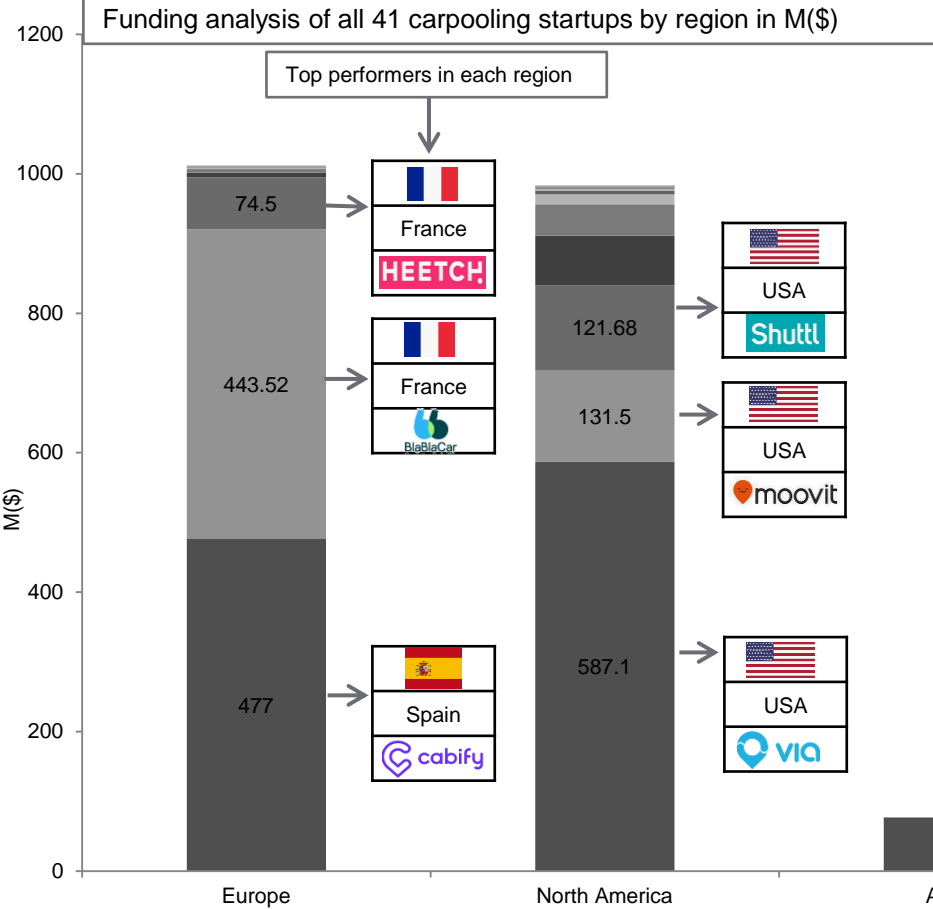
# Carpooling startups funding available from incorporation to Q1 2020 (21-30 out of 41 in descending order)



# Carpooling startups funding available from incorporation to Q1 2020 (31-41 out of 41 in descending order)



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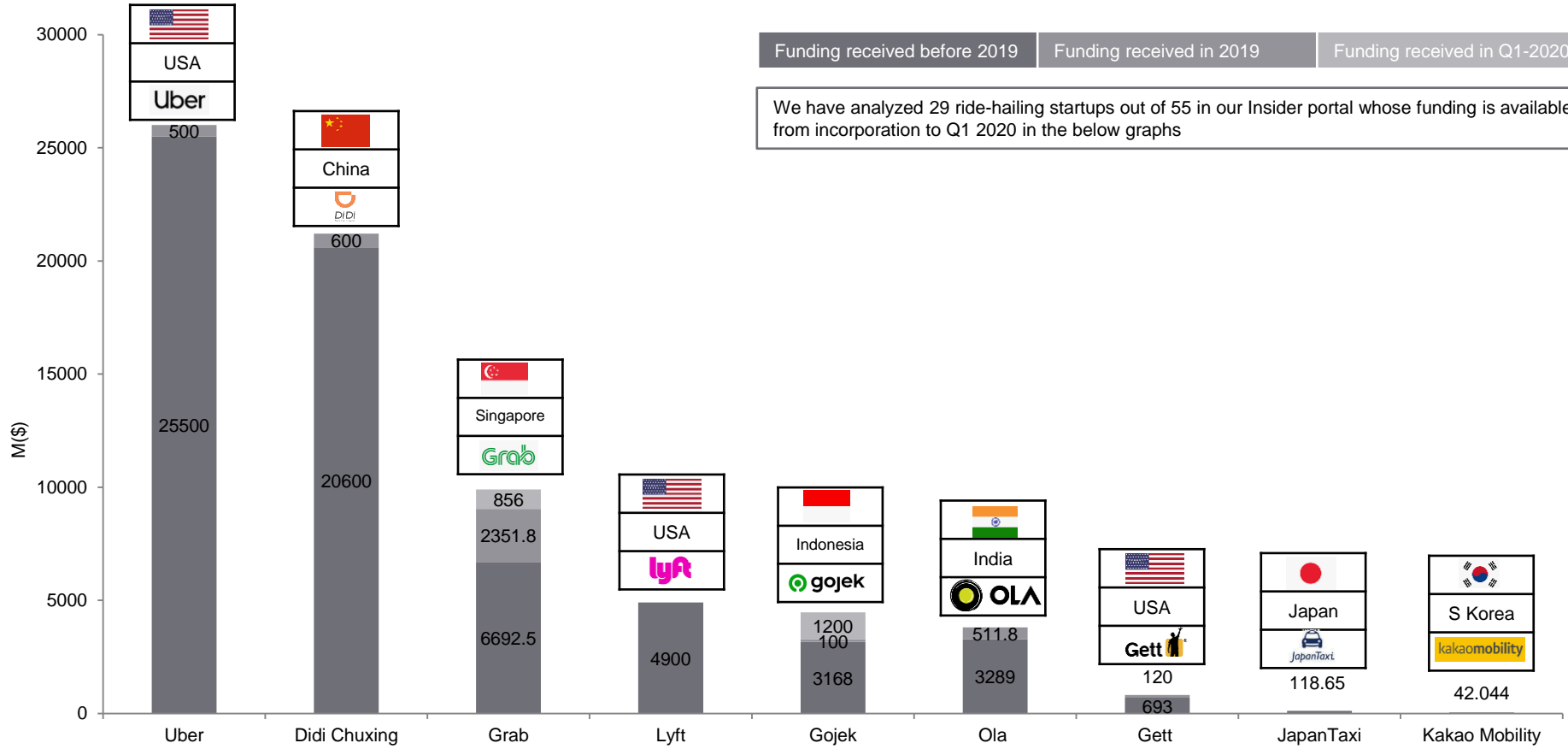
# 03

# Ride-hailing startups

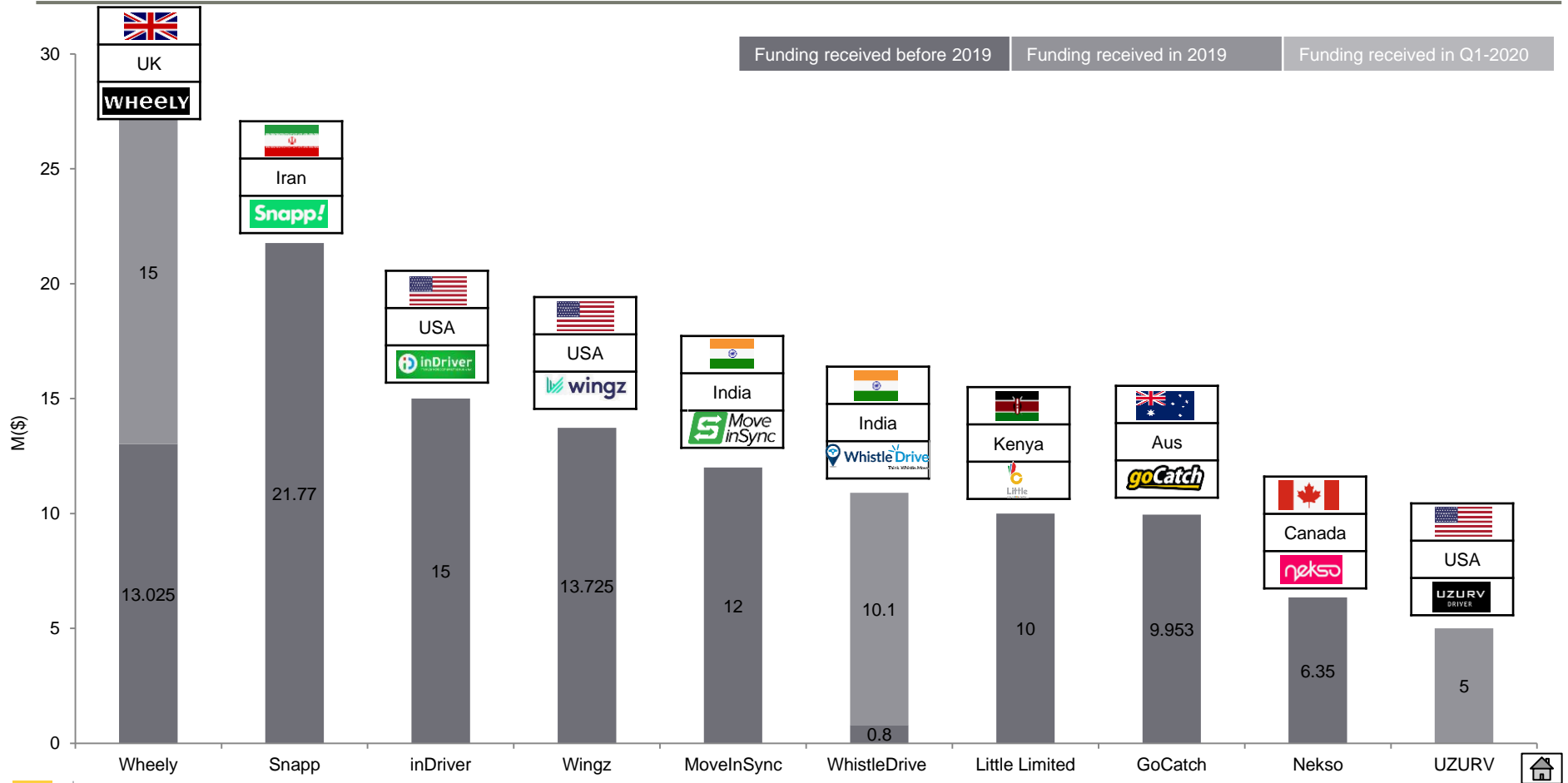
# Ride-hailing startups funding available from incorporation to Q1 2020 (1-10 out of 29 in descending order)

Funding received before 2019 | Funding received in 2019 | Funding received in Q1-2020

We have analyzed 29 ride-hailing startups out of 55 in our Insider portal whose funding is available from incorporation to Q1 2020 in the below graphs

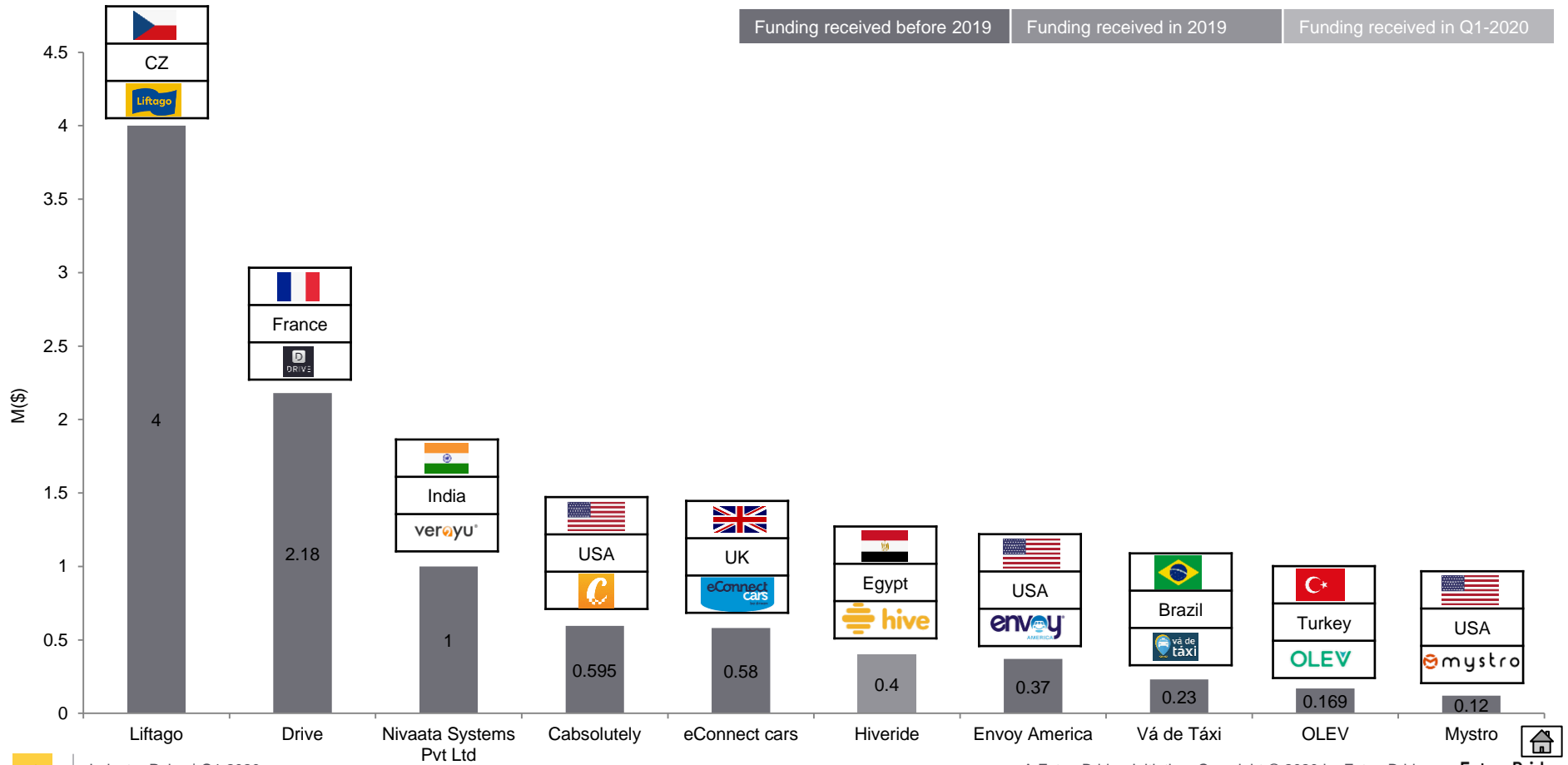


# Ride-hailing startups funding available from incorporation to Q1 2020 (11-20 out of 29 in descending order)



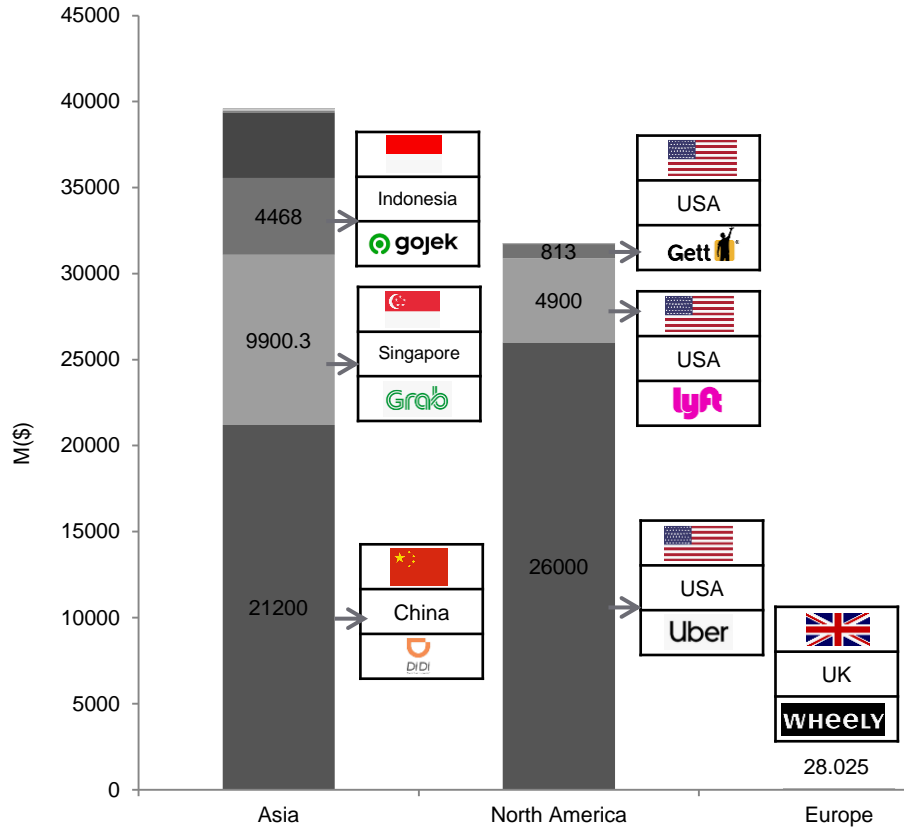


# Ride-hailing startups funding available from incorporation to Q1 2020 (21-29 out of 29 in descending order)

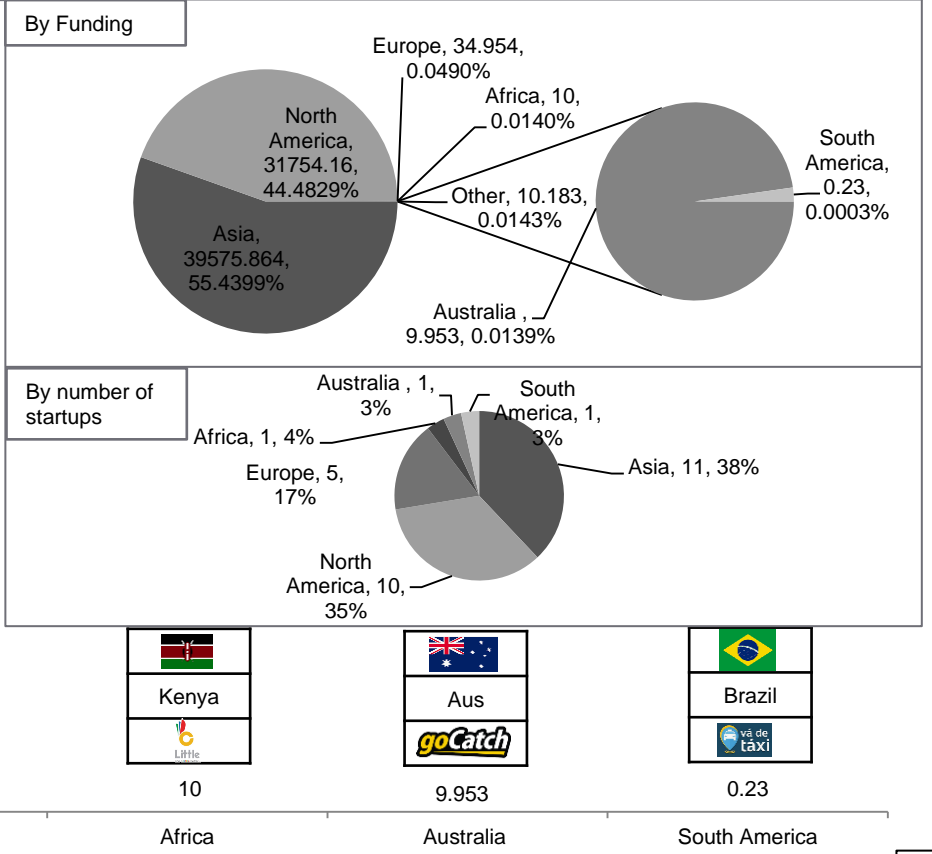


# Mobility Business Models | Q1 2020 Pulse

Funding analysis of all 29 ride-hailing startups by region in M(\$)



Funding analysis of all 29 ride-hailing startups by region in percentage



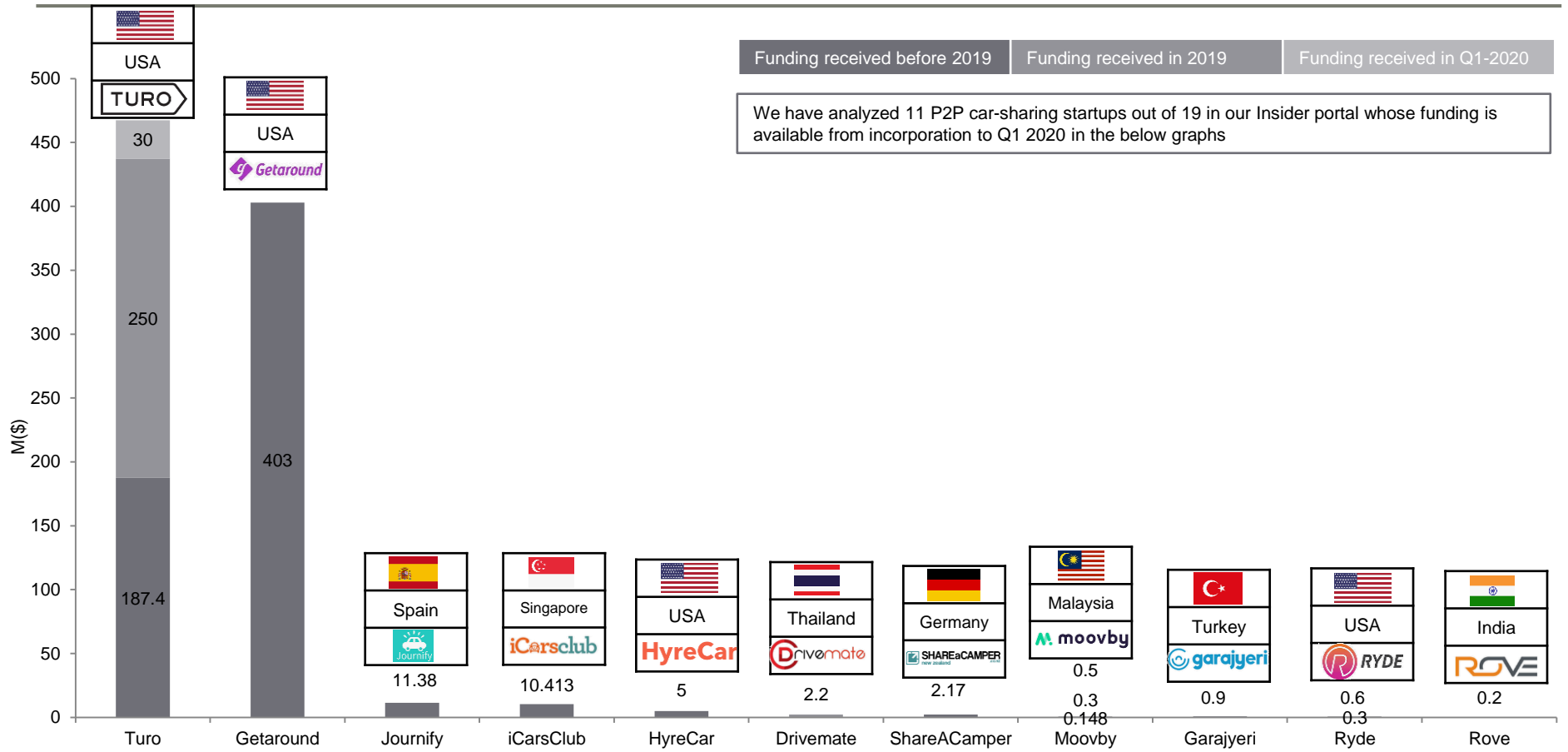
# 04

# P2P car-sharing startups

## P2P car-sharing startups funding available from incorporation to Q1 2020 (1-11 out of 11 in descending order)

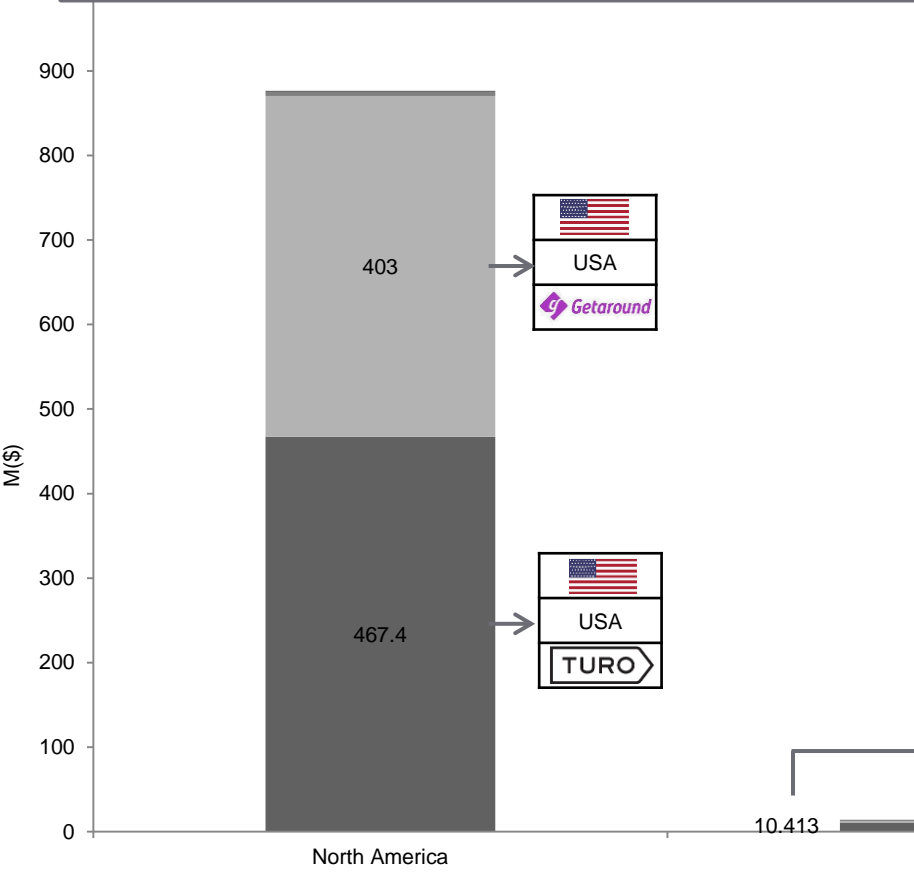
Funding received before 2019    Funding received in 2019    Funding received in Q1-2020

We have analyzed 11 P2P car-sharing startups out of 19 in our Insider portal whose funding is available from incorporation to Q1 2020 in the below graphs

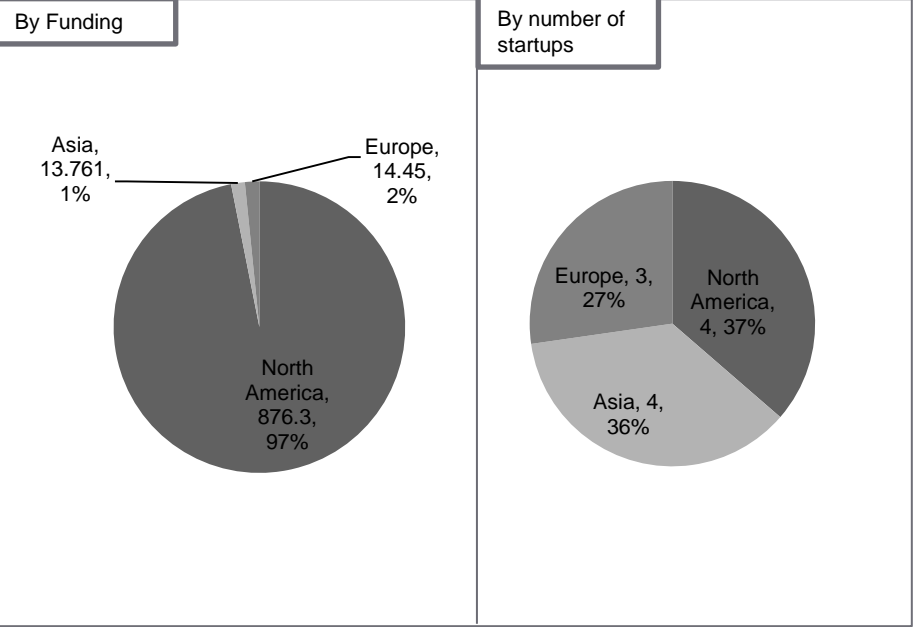


# Mobility Business Models | Q1 2020 Pulse

Funding analysis of all 11 P2P car-sharing startups by region in M(\$)



Funding analysis of all 11 P2P car-sharing startups by region in percentage



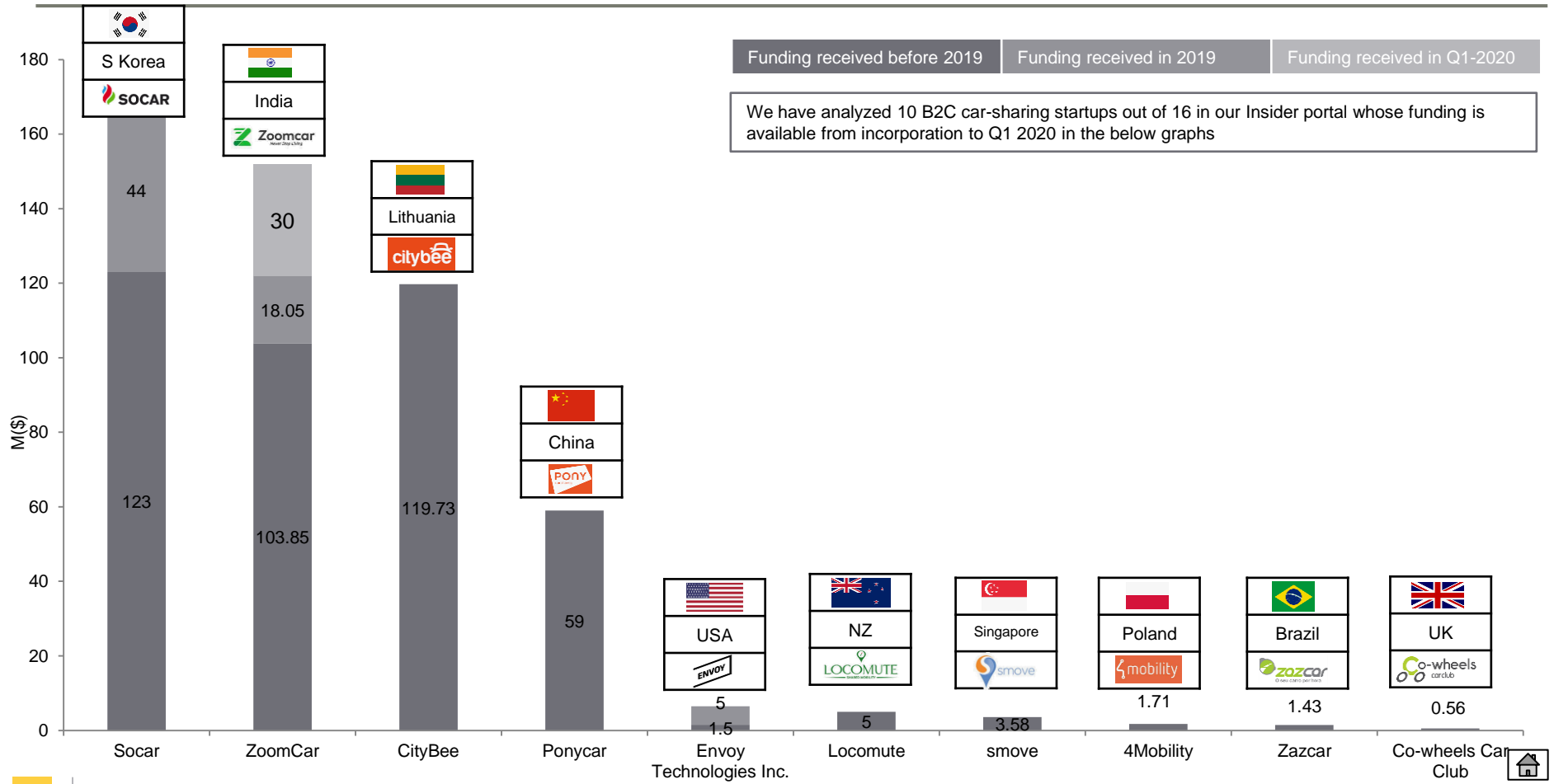
# 05

## B2C car-sharing startups

# B2C car-sharing startups funding available from incorporation to Q1 2020 (1-10 out of 10 in descending order)

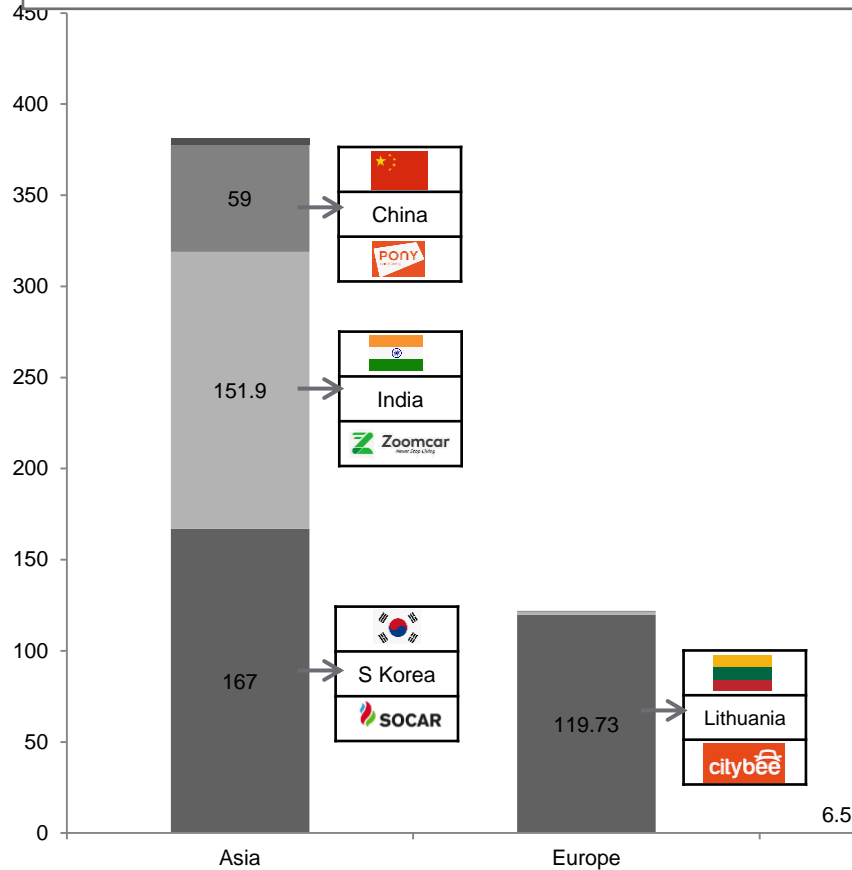
Funding received before 2019    Funding received in 2019    Funding received in Q1-2020

We have analyzed 10 B2C car-sharing startups out of 16 in our Insider portal whose funding is available from incorporation to Q1 2020 in the below graphs

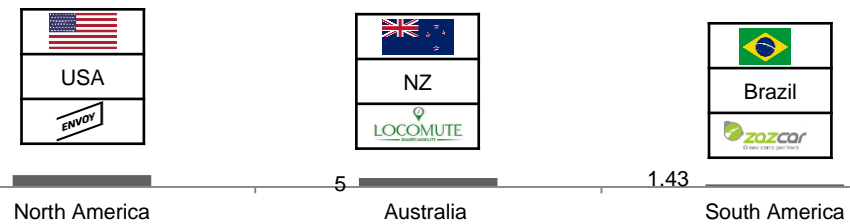
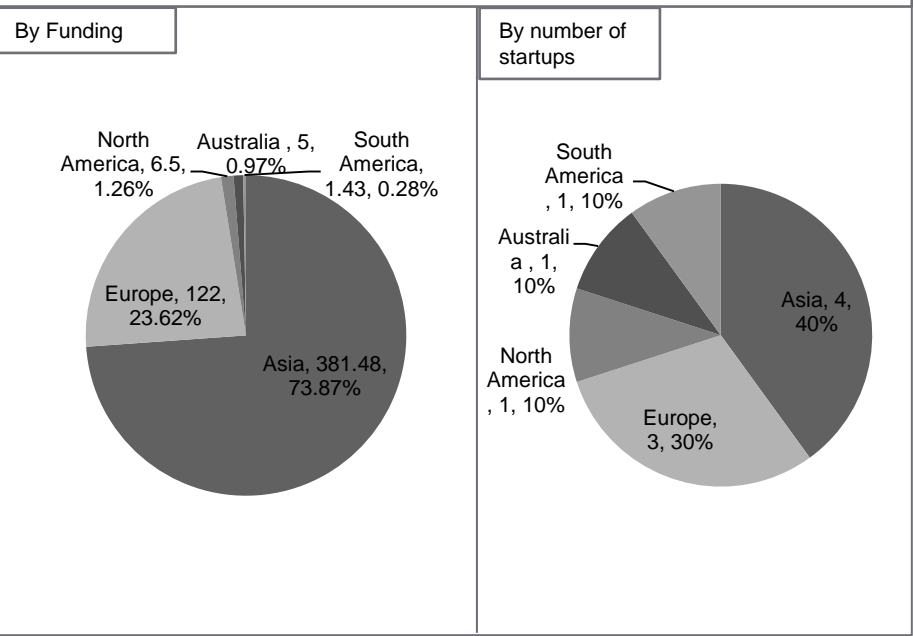


# Mobility Business Models | Q1 2020 Pulse

Funding analysis of all 10 B2C car-sharing startups by region in M(\$)



Funding analysis of all 10 B2C car-sharing startups by region in percentage





# 06

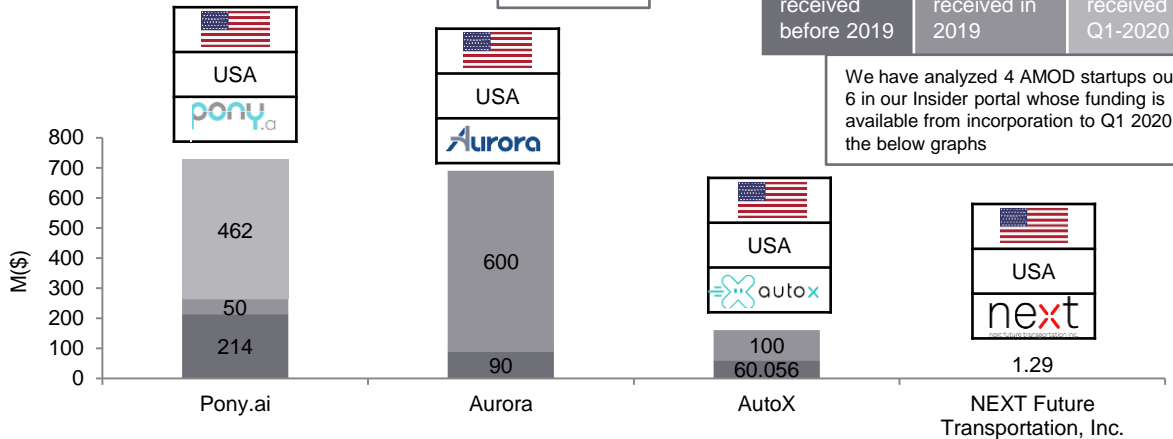
## AMOD, leasing, integrated mobility, software platform provider startups

# Mobility Business Models | Q1 2020 Pulse

## AMOD

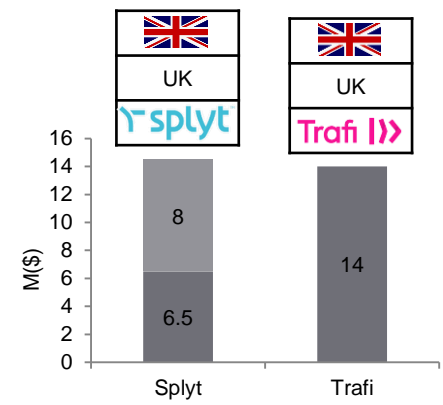
Funding received before 2019 | Funding received in 2019 | Funding received in Q1-2020

We have analyzed 4 AMOD startups out of 6 in our Insider portal whose funding is available from incorporation to Q1 2020 in the below graphs



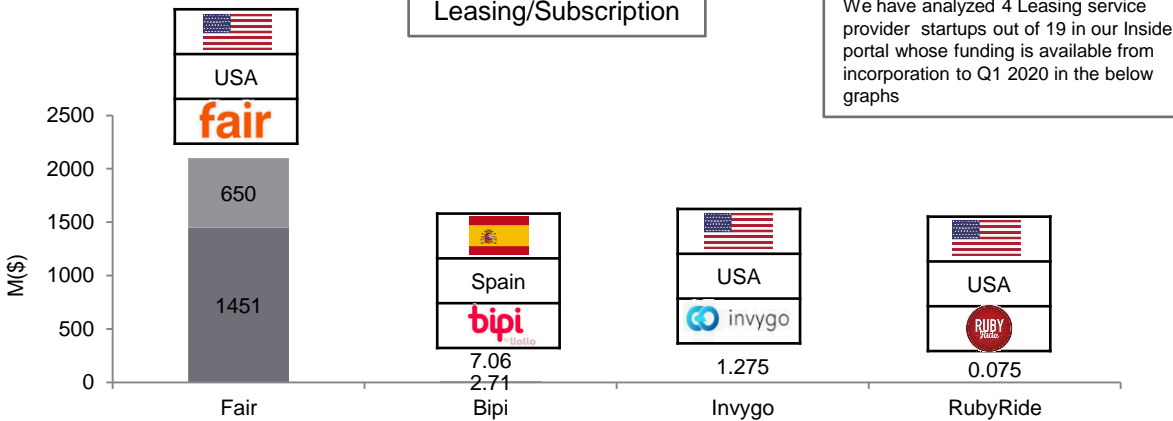
## Integrated Mobility

We have analyzed 2 Integrated mobility service provider startups out of 3 in our Insider portal whose funding is available from incorporation to Q1 2020 in the below graphs



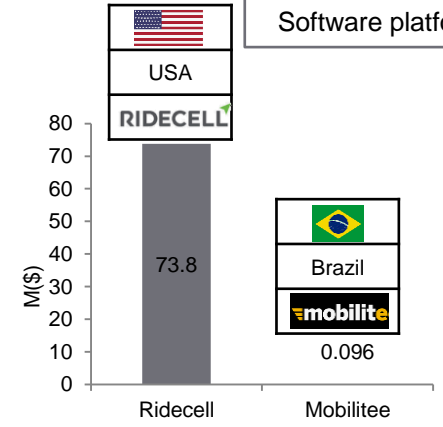
## Leasing/Subscription

We have analyzed 4 Leasing service provider startups out of 19 in our Insider portal whose funding is available from incorporation to Q1 2020 in the below graphs



## Software platforms

We have analyzed 2 Software platform provider startups out of 2 in our Insider portal whose funding is available from incorporation to Q1 2020 in the below graphs



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