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PTOLEMUS new forecast: connected mobility services to equip 650 million cars and generate \$350 billion in revenues by 2020

Launched today, the Connected Mobility Forecast 2016 is the first report to analyse and quantify the volumes and revenues of 14 car services markets and their associated connected car services globally.

The report highlights how connectivity is transforming the century-old automotive industry focused on manufacturing a product into a fast moving, services-centric industry. The shift is best illustrated by the growth of Uber's market capitalisation (\$62 billion), which, in the space of 7 years, has become significantly larger than industry veteran GM's (\$48 billion).

Car manufacturers are catching up fast, acquiring or investing globally in car sharing, pooling and leasing. The Connected Mobility Forecast concludes that **revenues from these 3 services will grow as much as tenfold** over the next 5 years.

As the nature of car usage, ownership and provision changes under the influence of population growth, traffic and connectivity, global car sales are expected to stagnate and most of the growth will come from mobility services. The Connected Mobility Forecast sets out to **identify the real potential revenue opportunities**, the key distribution models and who in the ecosystem is best placed to take advantage.

Frederic Bruneteau, Managing Director, commented: "Several OEMs such as GM and Ford have understood the magnitude of the change. However, restricted by their traditional automotive delivery model, car makers won't move as fast as the new mobility services players. By 2020, aftermarket service providers will generate 84% of mobility market revenues."

The 14 connected mobility markets are: car sharing, car pooling, car rental, navigation, in-vehicle Wi-Fi hotspot, stolen vehicle tracking & recovery (SVT, SVR), emergency assistance (eCall / automatic crash notification), usage-based insurance (UBI), remote diagnostics, connected breakdown assistance (bCall), car leasing, road user charging (RUC) / electronic tolling, fuel card services and telematics fleet management services.

The Connected Mobility Global Forecast 226-page report includes:

An analysis of the Total Addressable Market (TAM) volume and revenue for each service, provided from the perspective of the service provider to the end user, defined as the Mobility Service Provider (MSP) and its supplier, the Connectivity Service Provider (CSP).

A comparative examination of each market assessing:

- Business models, value chains and key players
- Regulatory and competitive environment

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- Connectivity penetration by region
- Key volume and revenue drivers
- Current and future market trends
- Global forecast to 2020 of the volumes and revenues per region

The Forecast also comprises the underlying 2015-2020 outputs of 14 bottom-up forecasts across 18 geographical markets. For each service, the **4,200 line workbook** includes:

- The total addressable market in volume and value seen from the MSP and CSP perspective
- The total underlying volumes and revenues by country
- The volume and revenue forecasts for the MSP and the CSP
- The split between OEM and aftermarket volumes and revenues

To download the free abstract, or access the full study, visit www.ptolemus.com/mobility or contact thomas@ptolemus.com

About PTOLEMUS Consulting Group

PTOLEMUS is the first strategy consulting firm entirely focused on connected mobility services and the Internet of Things. Present in Europe and North America, PTOLEMUS help leading car makers, their suppliers and aftermarket service providers define and execute their connected strategies.