Mobility Distribution Market Analysis – New Set Up

VALUE CHAIN

Search Engines / GAFA
- Curators / Content Platforms / Portals
  - Rating and Reviews
  - Guides
  - Forums
- Vertical search engines
  - Price or modal comparator
- Distributors
  - Specialists / mono-mode multi-modes Platform
- Operators
- Carriers
  - OTA
  - Brokers
- Authorities
  - Local Government Transport Agencies

RISKS
- Audience competition increase. Google dependence
- Massive marketing and advertising investments

- Retail marketing competition train tickets and mobility
- Regulation evolution, opening competition, data access (LOM)
- New mobility operators move up value chain to distribution
- Liberalization of the rail market
- New governance
The travel market faces 4 major challenges

1. New customer expectations and a revolution in digital practices
   - Multi-modal travel / information aggregation
   - Real-time passengers
   - Customisation and support
   - Seamless integrated trips

2. Environmental and sustainability issues

3. An abundance of mobility offers in urban areas...
   - Vs...

4. ... but a lack of travel options in sparsely-populated areas
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MaaS market integration level - B2C France

- **Level 3**: Single Basket multimodal
  - Payment facilities: Package, Pay as you Go
- **Level 2**: Payment integration
  - multi modal Platform: Plan – Book – Pay – Ticket
- **Level 1**: Aggregators
  - Comparison redirection offer
- **Level 0**: Real Time
  - App commercial monomodale

- **Services**
- **Local Market**
- **National Market**

- **Vision**

- **Plan / Navigation guide monomodal**
- **Navigation Platform**
- **E-Wallet transport**: Apple Pay, Samsung Pay
e.Voyageurs SNCF, the SNCF group's digital response to these challenges

- **120 million** tickets sold in 2019, of which 110 million in France and 10 million internationally
- **4.9 billion €** of business volume in 2019
- **20 years** of digital innovation
- **37 million** downloads of the OUI.sncf applications, the SNCF Assistant and Rail Europe in 2019
- Partners with an international presence
- **1,500** employees in 2020
e.Voyageurs SNCF, the SNCF group's digital response to these challenges

e.Voyageurs SNCF operates in a constantly changing mobility market

1. RESTARTING MOBILITY
   Make French people prefer SNCF and its partners' solutions for clean mobility

2. TRANSFORMING THE CUSTOMER EXPERIENCE
   Transform the experience of all of our travelers on all of their journeys

3. OPTIMISE AND SIMPLIFY
   Optimise our costs and simplify our structure to be more efficient

4. SPEEDING UP TECHNOLOGY
   Identify and integrate technological game changers.
The SNCF Assistant - The partner for day-to-day mobility

16 MILLION
downloads

150 MILLION
Route searches per month

6.2 MILLION
Alerts and traffic info consultations per month

2.4 MILLION
Subscribers to the alerts system

40 MILLION
Visits per month

4.5 MILLION
Users in the first quarter of 2020

AN EXPANDED TRAVEL APP

MORE PASSENGER INFORMATION
View information and receive alerts. Optimize your journey

MORE TRAVEL OPTIONS
Train, metro, bus, tramway, bike, taxi, hybrid bike...

MORE CUSTOMISATION
Smart customer account
Simplified customer experience
Dematerialised Tickets
A PLATFORM OPEN TO ALL TRAVEL PROVIDERS...

e.Voyageurs SNCF invites all transport operators to integrate l'Assistant SNCF, to simplify users' journeys in large cities and less-populated areas.

...OFFERING NEW AND INNOVATIVE SERVICES

NFC technology enhances the customer experience.

2020:
- Integration of a scooter partnership
- Possibility of notifying the station's traffic via the bot.
- Display of TER segmentation
- Deployment of the NFC system in the Ile-de-France region, Strasbourg city and gradually throughout the TER network (regional trains)
From Multi Modal to Inter modal offers

1. Propose
2. Compare
3. Combine
4. Enrich
Multi-Modal Mobility and Practices

Micro Mobility in Paris

SCOOTER IMPACT
LOW HYPOTHESIS  HIGH HYPOTHESIS

BIKE
5%

Requests per Distance
⅓ route requests between 0 and 10km -> urban mobility
⅓ route requests between 10 et 20km -> urban mobility
Multi-Modal Mobility and Practices

![Pie chart showing the distribution of request types.]

- **Majority of “Station to Station” requests and requests including Station:**
- **Few Door to Door**
- **Few searches using “My position”**
Assistant SNCF - New multi and inter modal offers

Context
Relevance
Reactive
Thank You