



### Alternatives to car ownership

#### Micromobility

0-2 miles  
35% of trips in the U.S.



**BIKE SHARING**



#### Medium distance

2-15 miles  
50% of trips in the U.S.



**RIDE HAILING**



#### Long distance

15+ miles  
15% of trips in the U.S.



**PEER-TO-PEER CAR SHARING**



### DISRUPTING THE CAR

Alternatives to car ownership by trip length

#### Micromobility



**BIKES & SCOOTERS**  
 motivate scoot  
 Lime SPIN/skip/ JUMP  
 BIRD Razor

60% of trips in the US

#### Medium distance



**RIDE HAILING**  
 UBER Lyft Ovia  
 Gett

25% of trips in the US

#### Long distance

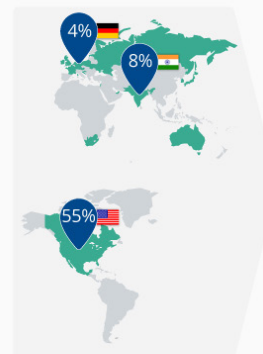


**CAR SHARING**  
 MAVEN CAR2GO  
 Getaround TURO

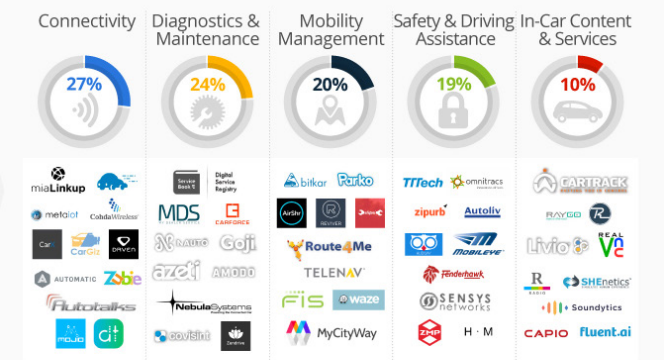
15% of trips in the US

### Connected Car Start-Ups: Where They're From and What They Do

#### Worldwide distribution of connected car start-ups



#### Segment breakdown of connected car start-ups



Based on a sample of 250 start-ups. The illustrated logos represent a selection out of this sample. A car is considered "connected" if it has built-in internet access and is thus equipped to interact with other connected cars, smartphones and the environment as well as to exchange information. The following are not included in the connected car market as defined here: B2B services (e.g. telematics for fleet management), commercial vehicles or cars that are retroactively "connected".

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safety



security



easy transfers



efficient



sustainable