Re-Thinking Transportation
Mack Institute for Innovation Management

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Global Leader in Public Transportation

Greater than 2.5 B trips annually

5 Continents
19 Countries
100 + Years of Passenger Transport Experience
83 K Employees
$8 B Revenue
Transdev North America
Leader in Multi-Modal Transportation

200+ U.S. Cities

- Fixed Route
- University
- Brokerage
- Employer Shuttle
- Rail
- Ferry
- Execucar
- Link
- Paratransit
- Student
- Maintenance
- Airport Service
- Streetcar
- Super Shuttle
- Taxi
What We Care About

Providing safe, sustainable mobility solutions which make a positive difference for the quality of life in cities.
How Digital Disruption is Affecting Us
Major Market Shifts

$11.5 Billion Raised
Valued at $62 Billion

$500 Million Investment
from General Motors
Valued at $5 Billion

$1 Billion Investment
by Apple in May

$100 Million Investment
from Private Investors
“Yes, the planet got destroyed. But for a beautiful moment in time we created a lot of value for shareholders.”

—The New Yorker
Uber and Lyft: Growing the Market, Cutting Prices, Subsidizing Fares and Drivers and Raising Customer Expectations

- Raised Expectations of Customers
- Grew Size of Market
- 50–75% Cheaper than Taxis
- Less than SuperShuttle
- Bypassed Regulations
Disruption Moving from Taxi to Transit

They are often a More Convenient, Direct Option

Prices Competitive With Bus and Rail

Agencies Using Uber for Paratransit Trips to Save Money

UberHOP and Bridj Offering Bus-Like Transit Services
The Future: More Choice Lets Customers Optimize Trips Based on Cost and Convenience

- On Demand
- Shared
- Transit

Price vs. Convenience

Logos: Lyft, UberPOOL, Lyft Line, Hailo, Yellow Cab, Transdev
Transdev’s Response
We’re Facing the Classic Innovator’s Dilemma
And we are taking action
We are Bringing Clients On-Demand Services to Improve Public Transportation

First and Last Mile

Replace Inefficient Bus Routes

Underserved Areas

Smarter Paratransit

TransdevLink
Tapping into Eco-Systems of Innovation
Our Philosophy and Approach
We are Investing in Seamless Mobility Options

- Mobility as a Service
- Browsing Options, Booking, Payment via Technology Platform
- Split Shared Shuttle
We are Innovating with Autonomous Vehicles and Zero Emission Vehicles

- Transporting 2,000 people a day in AVs in EDF campus in France
- Partnering with AV manufacturers and developers of related technology
- Leader in electric buses and alternative fuels
Conclusion

We See Opportunity in a Growing Mobility Market
Two Possible Scenarios for the Future

When the money runs out, the price war will end. Rational pricing will return and market will stabilize.

Shared ride, AVs will be the future at a low operational price with many new entrants – Transdev will have a significant role to play.
At Transdev, we believe in the future of human capital — even in an autonomous world!