

FROST & SULLIVAN

*MAY MOBILITY*

**2022**  
**MARKET**  
**LEADER**

*NORTH AMERICAN  
AUTONOMOUS SHARED  
MOBILITY INDUSTRY*

## Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. May Mobility excels in the autonomous shared mobility space.

AWARD CRITERIA	
Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

### *Growth Strategy Excellence*

May Mobility is leading the transformation of the mobility space by developing a portfolio of solutions for self-driving vehicles. May Mobility is an autonomous transportation company that has a presence in the autonomous mobility value chain and has successfully deployed self-driving vehicles across a number of locations in North America that are open to the public to pay and ride. The company’s deployment growth strategy starts with the development of routes that can be commercially viable for self-driving autonomous shuttles.

The company can completely design a scheduled passenger service based on customer requirements, such as the locations that need to be connected and the number of passengers that must be transported. May Mobility designs the route, conducts a study on how people travel the route and their modes of transport, conducts surveys and workshops to educate the general public about the advantages and the safety of driverless public transport, and determines the most efficient path between locations. Post this exercise, May Mobility identifies infrastructure bottlenecks and restraints, maps out the entire route that will be read by the autonomous software, and trains the personnel who will need to supervise the vehicles during the initial days. May Mobility’s advantage, therefore, is that unlike competitors that concentrate only on the autonomous self-driving technology or vehicle fabrication, May Mobility offers all of this and implements a turnkey operation from scratch, all the way to project completion.

The primary components of a self-driving vehicle are the vehicle itself; the software, which is the brains of the operation; and the hardware, which is the eyes of the operation. May Mobility’s approach toward

autonomy includes collaborating with vehicle providers and then creating an autonomous stack that comprises the software, thus ensuring the software stack can be integrated with various types of hardware, such as sensors, cameras, and radar systems. The easy integration of the software with different hardware choices allows May Mobility to customize its autonomous driving solution based on customer requirements.

### **Customer Service Experience**

May Mobility is the first autonomous shared mobility company to integrate an on-demand autonomous vehicle service with existing transportation services. In Arlington, Texas, from 2021 to 2022, May Mobility's service, which was designed to provide residents and students with a transportation option

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between downtown Arlington and the University of Texas, successfully carried out over 28,000 rides over a one-year period, starting from March 2021. The service was available over an area of one square mile, and passengers could book rides from the May Mobility app. The fleet consisted of four Lexus SUVs and a wheelchair-accessible Polaris shuttle.

Over the one-year period, the autonomous service in Arlington recorded an on-time performance of 99% and a customer satisfaction rating of over 98%. This positive customer experience is an important step in creating more awareness and trust among commuters for self-driving vehicles, eventually helping May Mobility in the long run because it can dispel wrong notions regarding passenger safety in driverless vehicles and help in the introduction of regulations that allow driverless shuttles to be operated without a safety driver. The successful pilot service in Arlington resulted in the city extending the service through 2024.

Success stories, such as in Arlington, have allowed May Mobility to expand with services that have higher passenger throughput capacities and can cover a larger area. For example, on September 28, 2022, May

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Mobility and Minnesota Department of Transportation launched a 75-stop deployment of standard and wheelchair-accessible services that include BraunAbility ADA-compliant products in Grand Rapids, Minnesota, thus catering to the disabled and infirm population, especially in terms of last-mile connectivity. Since the community is rural, May Mobility makes access to essential services like

medical, recreational, and supermarkets possible for the community. Plus, since the community has a variety of differently abled citizens, May Mobility offers three wheelchair-accessible vehicles in the Grand Rapids fleet to ensure a truly comprehensive rider experience.

### *Implementation Excellence*

After years of extensive testing in private, non-public areas, May Mobility has expanded to 6 locations in the United States, tying up with city authorities to provide commuters with a fully autonomous passenger service. The company's vehicles and services are revenue generating, with rides bookable through the company's smartphone application or a third-party service (like 211) for riders without a smartphone. According to May Mobility, it focuses on scalability because it is the most efficient utilization of capital and an improvement in unit economics. As a result of its extensive system of routes in which it operates, May Mobility is a leader in the North American autonomous shared mobility industry, in terms of the number of rides successfully operated, which is more than 320,000 to date. Operationally, these rides, according to May Mobility, are net capital positive, and the company states that the economics will improve as the technology advances and when vehicles operate with more autonomy, such as the removal of the safety driver. For example, May Mobility's technology can safely drive itself on normal streets in mixed traffic conditions in fully autonomous mode; however, the presence of a safety driver is still a regulatory requirement. As regulations change, May Mobility, with its superior unit economics, is well poised to expand faster and more profitably than competitors.

### *Technology Leverage*

May Mobility has a technological edge over its competitors because it has designed its autonomous software to function differently from competing solutions in this segment. May Mobility's autonomous software is determined by algorithms devised by the Multi-Policy Decision Making (MPDM) framework, achieved by fitting shuttles with a 360-degree view of the environment through strategically placed cameras, radar, and LiDAR systems. As the hardware 'sees' the environment, the data from the hardware is used as the input for the software to make decisions and direct the vehicle. The algorithm that determines this decision-making process is the MPDM framework because after years of testing, the company designed the algorithm to mimic human decision making. As more May Mobility vehicles are deployed worldwide, they will collect more data to sharpen the algorithm and make it more accurate. In addition, the company designed the technology to be based on any type of platform, from an off-the-shelf vehicle to a shuttle or a vehicle designed from the ground-up as an autonomous vehicle.

For example, May Mobility's fleet comprises Toyota Sienna vans, which are available as non-autonomous vehicles in the market. Both vehicle types, the passenger and the wheelchair-accessible vehicle, have been converted to self-driving vehicles through the aftermarket fitment of optical sensors and with May Mobility's autonomous driving software system. May Mobility developed its software to work with a wide range of optical sensors, along with the physical fitments and backend software infrastructure, allowing the company to reconfigure other off-the-shelf vehicles into autonomous driving vehicles as another option for clients. For example, May Mobility can offer a van model with more seating capacity to meet a client's requirement. As a result, May Mobility's clients can base their fleets on a large breadth of options in the automobile market.

## Conclusion

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May Mobility has a strong in-house technological base, offers a product that has been tested in the real world, and has already carried out over 320,000 self-driving rides across the United States. May Mobility, therefore, is a leader in the nascent yet promising North American autonomous shared mobility space, with a strong product portfolio, growing client base, and a proven track record in safety and customer satisfaction. In addition, May Mobility is leading the way in recognizing that self-driving public transportation will need to cater to the disabled and the infirm and has thus tied up with companies that create products to allow wheelchair-bound passengers to use driverless shuttles without human assistance. Passenger mobility, therefore, can be increased, especially in terms of last-mile connectivity.

For its strong overall performance, May Mobility is recognized with Frost & Sullivan's 2022 North American Market Leadership Award in the autonomous shared mobility industry.

## What You Need to Know about the Market Leadership Recognition

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Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

### Best Practices Award Analysis

For the Market Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### *Business Impact*

**Growth Strategy Excellence:** Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities.

**Implementation Excellence:** Company processes support efficient and consistent implementation of tactics designed to support the strategy

**Brand Strength:** Company is respected, recognized, and remembered

**Product Quality:** Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

**Product Differentiation:** Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate.

#### *Customer Impact*

**Technology Leverage:** Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value.

**Price/Performance Value:** Products or services provide the best value for the price compared to similar market offerings

**Customer Purchase Experience:** Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

**Customer Ownership Experience:** Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service

**Customer Service Experience:** Customer service is accessible, fast, stress-free, and of high quality

## About Frost & Sullivan

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## The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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### Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



## The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

### Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

