

# SMART CITIES Conference

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## ITS Market Analysis

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## 1. Smart passenger transport

- Key players
- Services
- Fees and payment
- Safety
- Community
- Differentials
- Conflicts

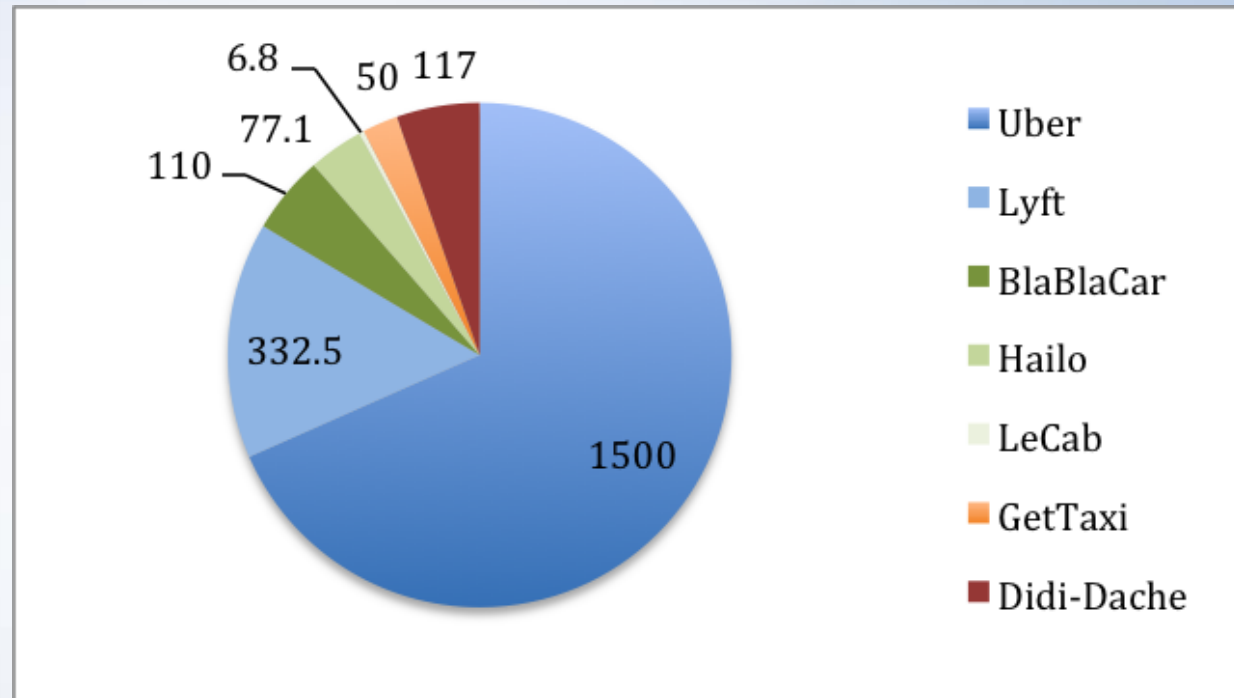
## 2. Goods transportation and delivery

- Key players
- Services
- Fees and payment
- Differentials

# Smart passenger transport

## Key players)

- **US**
  - Uber (2009)
  - Lyft (2012)
- **Europe**
  - BlaBlaCar (2012)
  - Hailo (2011)
  - LeCab (2012)
- **Middle East**
  - GetTaxi (2010)
- **Asia**
  - Didi-Dache (2012)



Pie shows venture investments in \$ million.

Firms listed above are jointly valued around \$ 20 billion!

- **Taxi hailing**
  - Enable commuters to hail a taxi with few taps on their smartphone
  - Enable taxi drivers to instantly receive demands for their services
  - Most firms are only matchers (do not own vehicles and do not employ drivers)
- **Ride sharing**
  - Drivers pick up commuters along the way
    - Shared costs
    - Web and/or smartphone apps enable matching of supply and demand
- **Car sharing**
  - Car owners who use their vehicles less frequently rent them to others
  - Community oriented apps

- Private transporters
  - Professional and non-professional drivers
  - Private vehicles
  - Have to be employed = selected by certain standards
    - DMV checks
    - Age limitations
    - Criminal record checks
    - Vehicle standards
  - Apps work like taxi-hailing ones, but usually contain more social networking features

# Smart passenger transport Services

NAME	FOUNDED	MARKET	CAB	PRIVATE STANDARD	PRIVATE LUXE	5+ SEATERS	RIDESHARNG	FOR BUSINESSES	RENT-A-CAR
UBER	2009	US, EU, Asia	✓	✓	✓		✓	✓	
SIDECAR	2012	US		✓					
LYFT	2012	US		✓		✓	✓		
HAXI	2013	Scandinavia, US					✓		
ZIPCAR	2000	US, CAN, EU						✓	✓
HAILO	2011	US, EU	✓	✓	✓			✓	
KUTSUPLUS	2013	Finland				✓	✓	✓	
HITCHRIDES	2012	Washington		✓					
SUMMON	2012	Bay Area	✓	✓					
WINGZ	2013	US		✓					
FLYWHEEL	2009	US	✓						
BLABLACAR	2012	EU					✓		
DJUMP	2013	EU		✓			✓		
GET TAXI	2010	US, EU, Middle East	✓		✓			✓	
RELAYRIDES	2010	US							✓
EASYTAXI	2011	America, Asia, Africa	✓						
SNAP CAR	2012	Paris	✓					✓	
HEETCH	2013	Paris					✓		
HITCH	2013	San Francisco		✓					
LECAB	2012	France			✓			✓	
SAVAREE	2014	Pakistan					✓		
KANDI	recently	China							✓
DIDI-DACHE	2012	China	✓						



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# Smart passenger transport

## Fees and payment

Payment via app = pay with your credit card and receive the receipt via e-mail

	COMPANY CHARGES		FIXED RIDERS FEES			PAYMENT				FIXED DRIVER FEES	
NAME	PER FARE/RENT	SURGE PRICING	MEMBERSHIP	PER RIDE/RENT	OTHER	CASH	VIA APP	OTHER	DONATION BASED	PER TIME PERIOD	PER RIDE
UBER	15-20%	✓		✓	✓		✓	✓		✓	✓
SIDECAR	20%				✓		✓		✓	NA	NA
LYFT	10-20%	✓		✓	✓		✓	✓	✓	✓	NA
HAXI	NA					✓			✓	NA	NA
ZIPCAR	✓		✓		✓		✓	✓			
HAILO	10%	✓		✓	✓		✓				✓
KUTSUPLUS	✓			✓			✓				
HITCHRIDES	10%	NA					✓			NA	NA
SUMMON	✓			✓			✓			NA	NA
WINGZ	✓			NA			✓			NA	NA
FLYWHEEL	✓			✓			✓			NA	
BLABLACAR	11%										
DJUMP	(donations)						✓		✓		
GET TAXI	✓				✓		✓			✓	✓
RELAYRIDES	25%				✓			✓			
EASYTAXI	✓					✓		✓			✓
SNAP CAR	✓	✓					✓				
HEETCH	20%						✓				NA
HITCH	NA	NA		NA	NA		✓		NA	NA	NA
LECAB	✓	NA		✓			✓			NA	NA
SAVAREE	NA			NA			✓		NA		NA
KANDI	✓	NA						✓			
DIDI-DACHE	NA	NA	NA	NA	NA	NA	NA			NA	NA

# Smart passenger transport

## Safety

- Drivers usually insured \$1million per ride
- Driver and/or commuter profiles
- Most apps allow driver and/or passenger rating
  - Passengers don't have to ride with bad drivers
  - Drivers don't have to pick up rude passengers
  - Some apps allow you to mark users who you like/dislike
  - Efficient
- Zero alcohol tolerance
- Zipcar costumers (who pay memberships) insured up to \$300k per accident

	PROFILES		RATING OF	
NAME	RIDERS	DRIVERS	RIDERS	DRIVERS
UBER	✓	✓	✓	✓
SIDECAR	✓	✓	✓	✓
LYFT	✓	✓	✓	✓
HAXI	✓	✓		
ZIPCAR				
HAILO		✓		
KUTSUPLUS				
HITCHRIDES		✓		
SUMMON	✓	✓		✓
WINGZ		✓		✓
FLYWHEEL				
BLABLACAR	✓	✓	✓	✓
DJUMP	✓	✓		
GET TAXI		NA		
RELAYRIDES	✓	✓	✓	✓
EASYTAXI	✓	✓		
SNAP CAR		✓		✓
HEETCH	✓	✓		✓
HITCH	✓	✓	NA	✓
LECAB				
SAVAREE	✓	✓	NA	✓
KANDI				
DIDI-DACHE		✓	NA	NA



# Smart passenger transport

## Community

- Community oriented
  - Friendly
  - Professional
  - Social networking features
  - User retention
  - Not many gamification features have been introduced
  - Lyft, BlaBlaCar
  - Waze
- Not community oriented
  - Focus on service itself

	COMMUNITY
NAME	ORIENTED
UBER	
SIDECAR	✓
LYFT	✓
HAXI	✓
ZIPCAR	
HAILO	✓
KUTSUPLUS	
HITCHRIDES	
SUMMON	
WINGZ	
FLYWHEEL	
BLABLACAR	✓
DJUMP	✓
GET TAXI	
RELAYRIDES	✓
EASYTAXI	
SNAP CAR	
HEETCH	✓
HITCH	✓
LECAB	
SAVAREE	✓
KANDI	
DIDI-DACHE	

# Smart passenger transport

## Differentials

UBER	first, biggest on the market
SIDECAR	big, very community oriented, drivers have the ability to set their own price
LYFT	non-obligatory payments (no payment = bad profile rate)
HAXI	simple, provides only software for matching
ZIPCAR	Zipcard technology, easy to use, clean fuel vehicles, special offer for universities
HAIO	social network features allow drivers to report traffic and customer info, fixed fares for businesses
KUTSUPLUS	company owns only minibuses and vans (similar to Goopti), orders via SMS, map instructions from last stop to final destination
HITCHRIDES	fast - GPS tracker and electronic ride records
SUMMON	against surge pricing
WINGZ	airport rides
FLYWHEEL	works within regulatory framework, can face airport and city transport regulations, avoids legal issues
BLABLACAR	strongly based on community, 'bla' rating, drivers get only enough to cover their expenses with a full car, 'ladies only' feature, other safety features
DJUMP	commission is 0%, revenue is based on donations, cool website -> community oriented, organizes events
GET TAXI	blackberry app, only luxe rides, no surge pricing and other rider fees
RELAYRIDES	first and leading p2p car rental, can rent at airports, other safety features
EASYTAXI	windows phone, blackberry app, operative in 27 countries, 120+ cities
SNAP CAR	moving towards b2b (new features), booking sharing via social media, email or SMS, mineral water and iphone charger inside rides
HEETCH	only works at nights (8pm-6am), party community, promotes party events, looks to fill the gap in night transport in Paris
HITCH	cheap, strongly community oriented
LECAB	standard vehicles - Peugeot 508 with iPads, pre-fixed prices based on distance, large fleet, does airports, railway stations, rents private jets
SAVAREE	allows you to post routes and report interesting things and info on the way
KANDI	Kandi Machines = skyscraper parking houses for car vending, they address pollution (EVs), parking problems and transport quality issues
DIDI-DACHE	Chinese taxi-bidding service



- Uber vs Lyft
  - Battle for drivers - insanely high bonuses for new drivers (up to \$1000)
  - Both ordered each other's rides just to cancel them (U: 5k, L: 13k)
  - Does Lyft want to be bought by Uber? Does Uber want to buy Lyft?
- Uber vs State/Local Authorities
  - Germany
  - Brazil
  - US
  - Vancouver
- Uber vs Taxi drivers
  - Spain
  - London
  - India
- Is Uber (at \$18 bn) too big to fall?

- **US**

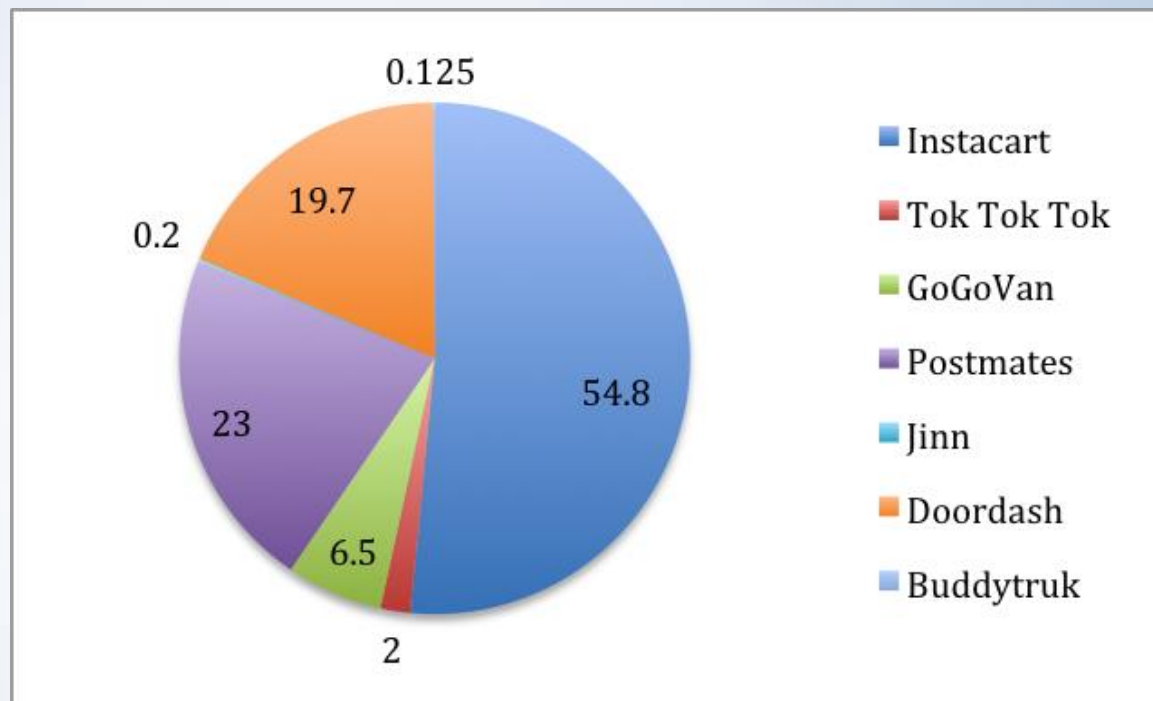
- Instacart (2012)
- Buddytruk (2013)
- Postmates (2012)
- Doordash (2013)

- **Europe**

- Tok Tok Tok (2013)
- Jinn (2013)

- **Asia**

- GoGoVan (2013)



- **Delivery**
  - Order desired products via smartphone or web app
  - Personal shoppers bring you ordered goods
  - Limitations:
    - Some firms deliver only goods from their offer
    - Weight and/or size limit
- **Transport**
  - Order transport services via smartphone or web app
  - Some firms employ transporters
  - Some firms are based on creating peer-to-peer service communities
  - Weight and/or size limit

# Goods transportation and delivery Services)

Most firms offer services inside certain cities or even smaller areas.

BASIC INFO			DELIVERY				TRANSPORTATION		
NAME	FOUNDED	MARKET	FOOD	GROCERIES	OTHER	SIZE/WEIGHT LIMIT	PASSENGERS	STUFF	SIZE/WEIGHT LIMIT
JINN	2013	England	✓	✓	✓	NA			
TOK TOK TOK	2013	France	✓			NA			
GOGO VAN	2013	Asia			✓	NA	✓	✓	NA
POSTMATES	2012	San Francisco	✓	✓	✓	✓		✓	✓
INSTACART	2012	US		✓					
WUN WUN	2013	NYC, Hamptons	✓	✓	✓	✓			
BUDDYTRUK	2013	Los Angeles						✓	
DOORDASH	2013	US	✓						

- Delivery firms
  - charge per delivery
  - often offer discounts for delays
  - charge different prices for different areas of delivery
- Goods transportation firms
  - charge per transport and/or size and/or weight
  - charge different prices for different areas of delivery
- Payments are carried out via smartphone app in all stated firms



# Goods transportation and delivery

## Differentials

NAME	DIFFERENTIATION FACTOR
JINN	target users are students, no catalogue - write what and where directly in the app
TOK TOK TOK	where possible, their service is synced with the retailers to keep track of inventory
GOGO VAN	they also rent vans and can transport pets, large fleet, driver rating
POSTMATES	they also support shipping stuff and delivering it for you around the city, fast deliveries, transporters use bicycles
INSTACART	all over US, instacart Express, instacart Plus
WUN WUN	free delivery (but they encourage tipping)
BUDDYTRUK	p2p on-demand moving and hauling, insurance, two-way rating, vehicle standards, driver background checks
DOORDASH	focused only on food delivery



# Thank You

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*»Projekt delno financira Evropska unija, in sicer iz Evropskega socialnega sklada. Projekt se izvaja v okviru Operativnega programa razvoja človeških virov za obdobje 2007–2013, 1. razvojne prioritete »Spodbujanje podjetništva in prilagodljivosti« ter prednostne usmeritve 1.3. »Štipendijske sheme«, v okviru potrjene operacije »Po kreativni poti do praktičnega znanja«.*