

# The Digital Shift in Road Transportation

Lessons learned from aviation

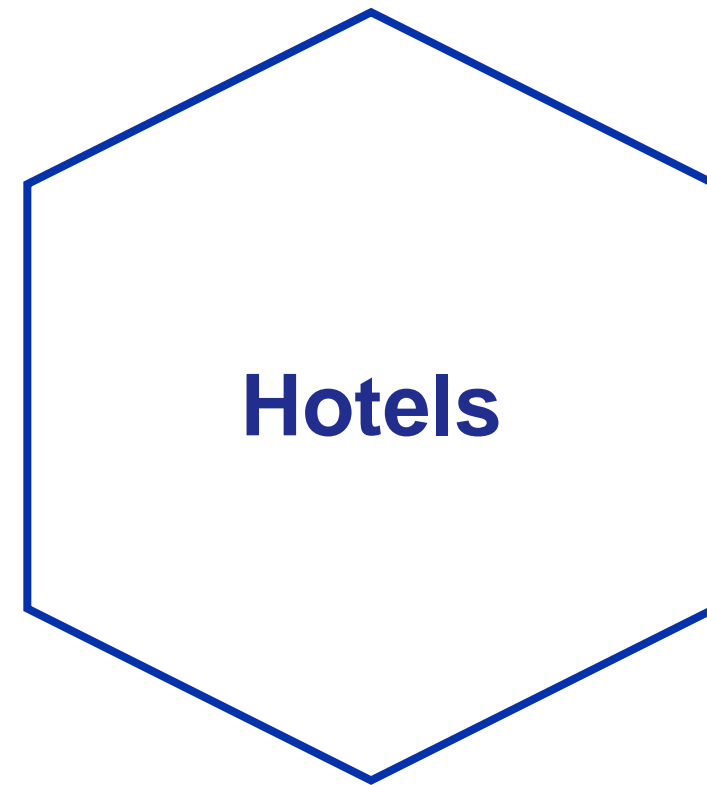
Marko Javornik

VP/GM Mobility & Travel





# The New Digital Economy



**Hotels**

**Airbnb:**

Employees: ~3,100  
Valuation: \$29,3B

**Hilton Worldwide:**

Employees: >300.000  
Valuation: \$19,8B



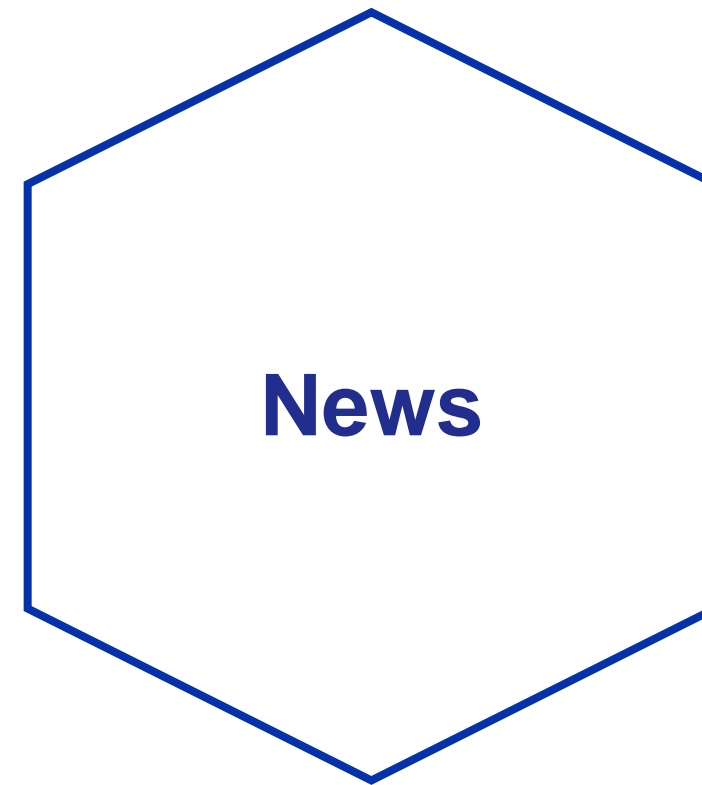
**Commerce**

**Alibaba:**

Employees: 50,100  
Valuation: \$360B

**Wal-Mart:**

Employees: 2,200,000  
Valuation: \$212,4B



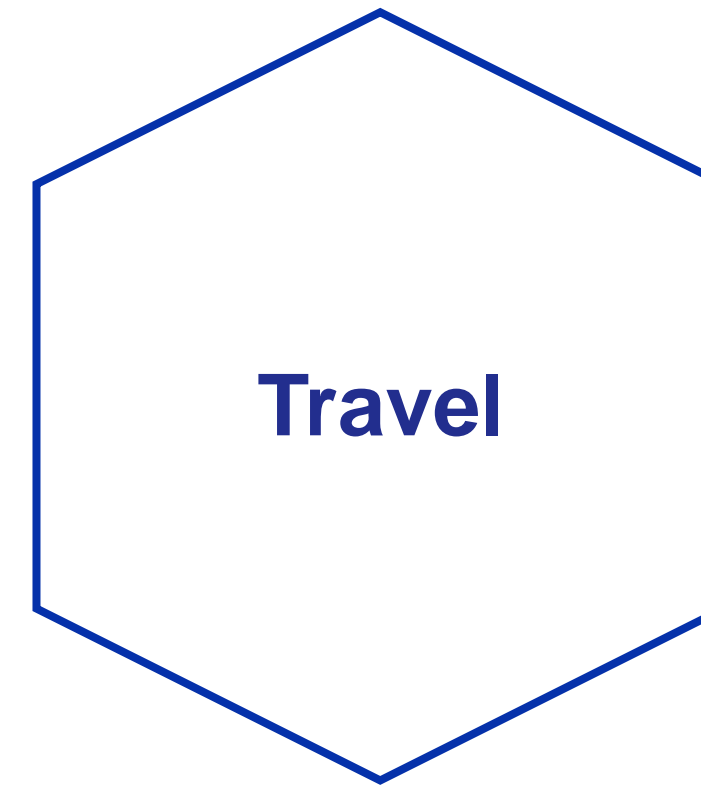
**News**

**Facebook:**

Employees: 20,700  
Valuation: \$408,6B

**The New York Times:**

Employees: 3,700  
Valuation: \$3,0B



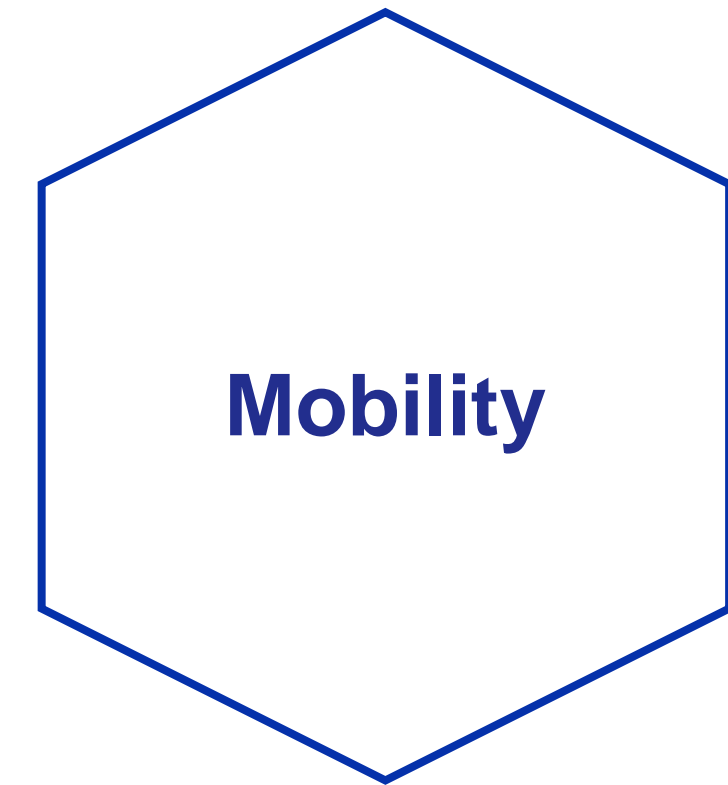
**Travel**

**Google Travel:**

Employees: ~10,000  
Valuation: \$100B

**Lufthansa:**

Employees: 120,300  
Valuation: \$10,8B



**Mobility**

**Didi:**

Employees: 7,600  
Valuation: \$50B

**Opel:**

Employees: 34,300  
Valuation: \$2,3B





## About Comtrade Digital Services

**1500+** Employees

**300M+** Revenues

**30** Strategic partnerships

### Ryanair

100M+ yearly passengers

### Itron

~100M Smart & connected meters

### Pay Safe

600 banks

140K+ members

40M users



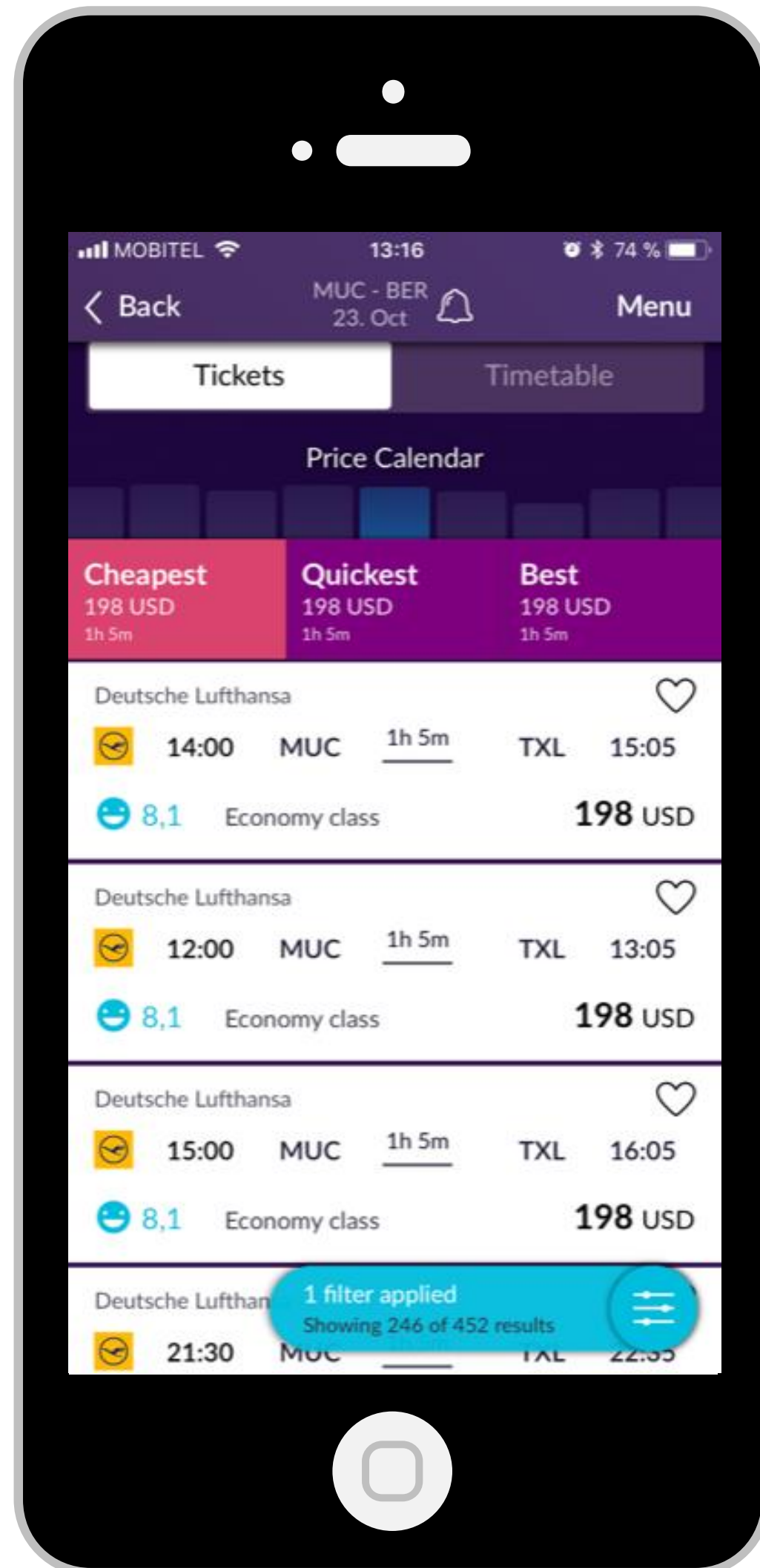
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# Comtrade Digital Transportation Lab





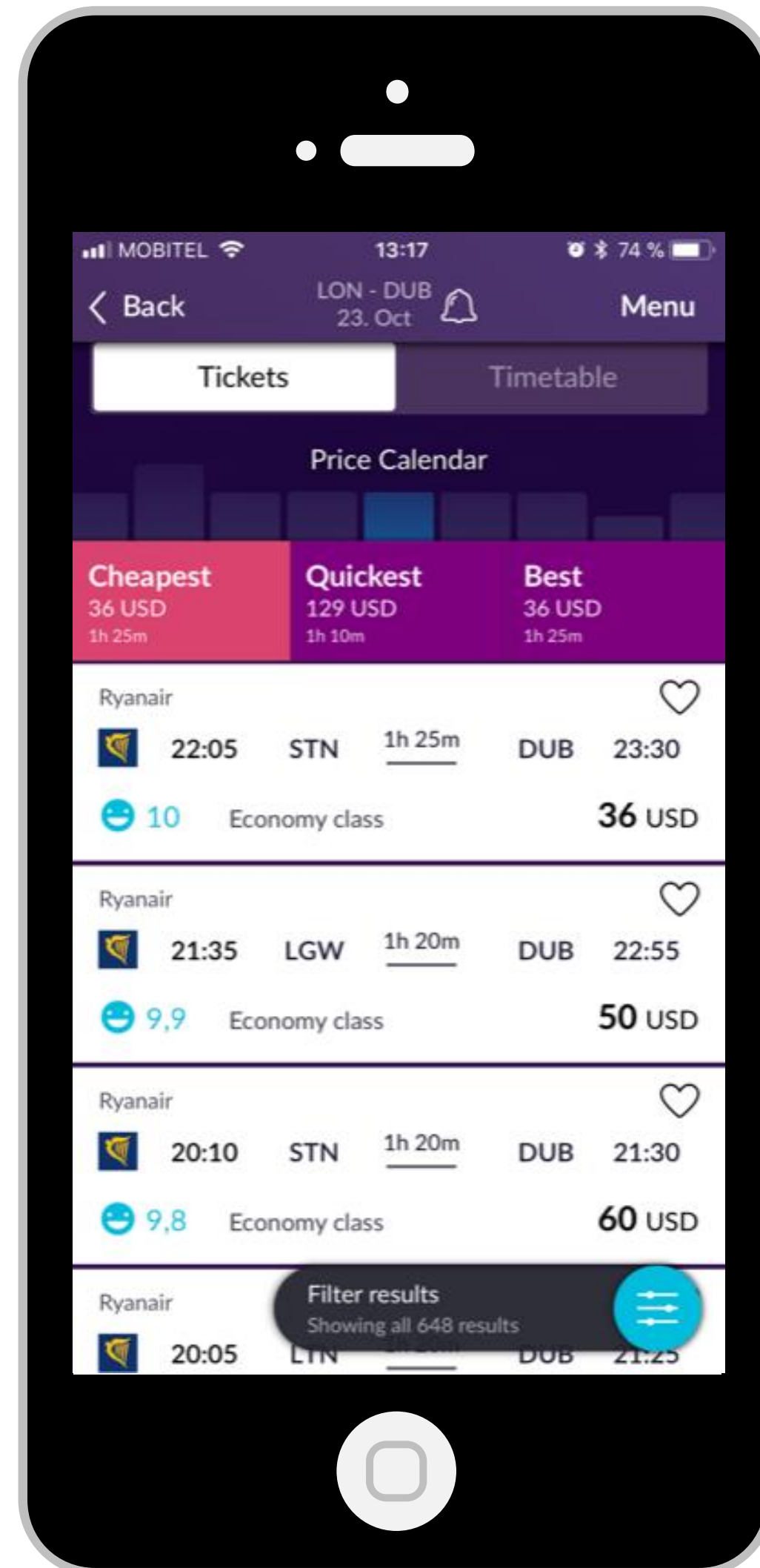
# Airlines – Basic Numbers






- 
-  Total Passengers: 4BN and growing
  -  Average Ticket Price: 165 EUR
  -  Average Profit: 7 EUR

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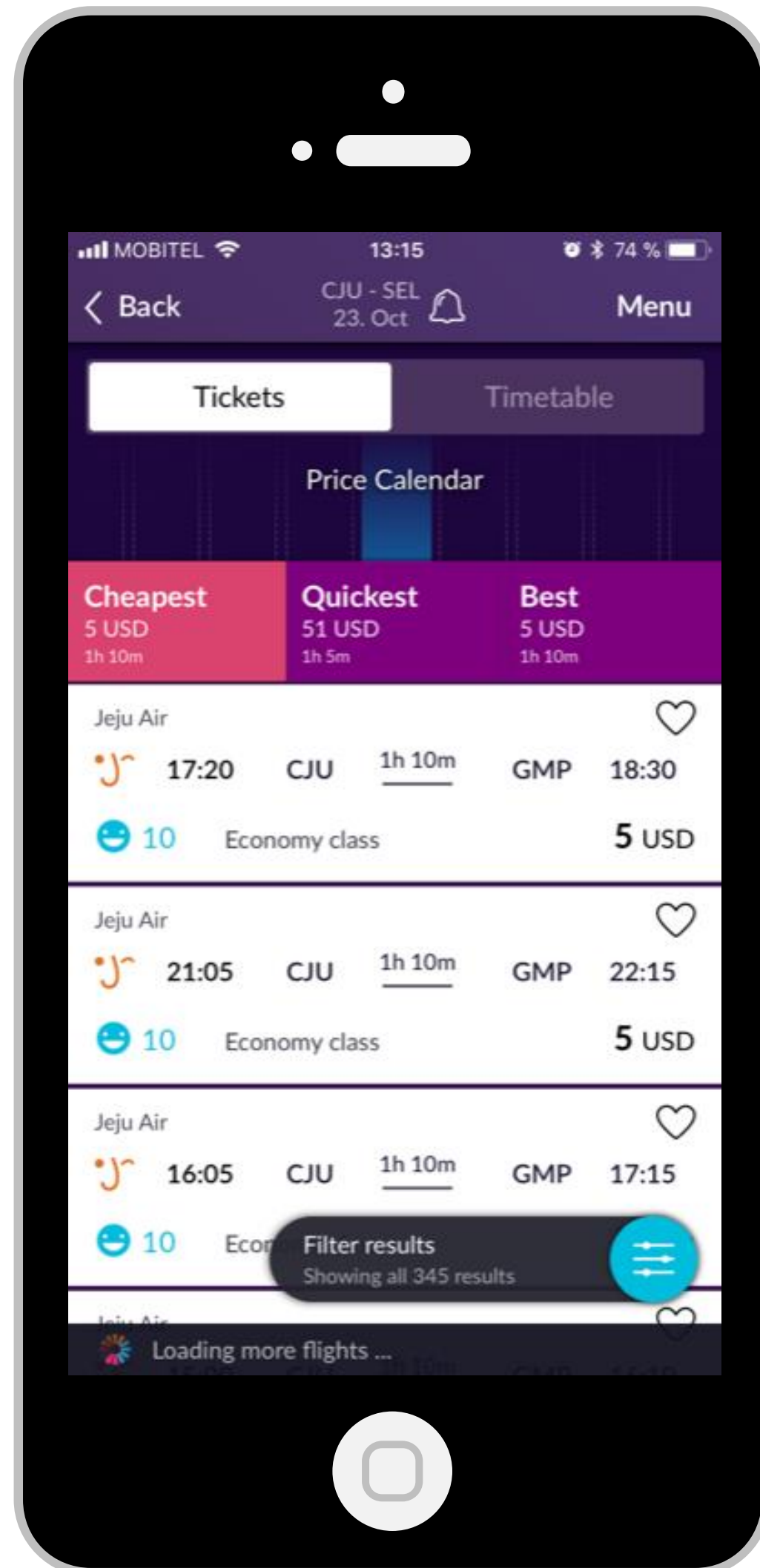
# Ryanair






- 
-  Total Passengers: 110M and growing
  -  Average Ticket Price: 40 EUR
  -  Average Profit: 11 EUR

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# Future Vision



- 
-  Total Passengers: 200M and growing
  -  Average Ticket Price: 0 EUR
  -  Average Profit: 20 EUR





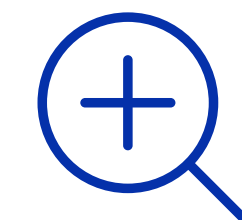
## Digital Platform

A business based on enabling value-creating interactions between external producers and consumers and thereby the exchange of goods and services. Enabling all involved parties to create new value.



## Network Ecosystem

No linear value chain, but complex network of relationships of network participants who are connected and conduct interactions, using the resources provided by the platform.



## Business Model

Platform allows businesses to unlock new sources of value creation and supply with new levels of efficiency.  
just-in-time → not-even-mine!



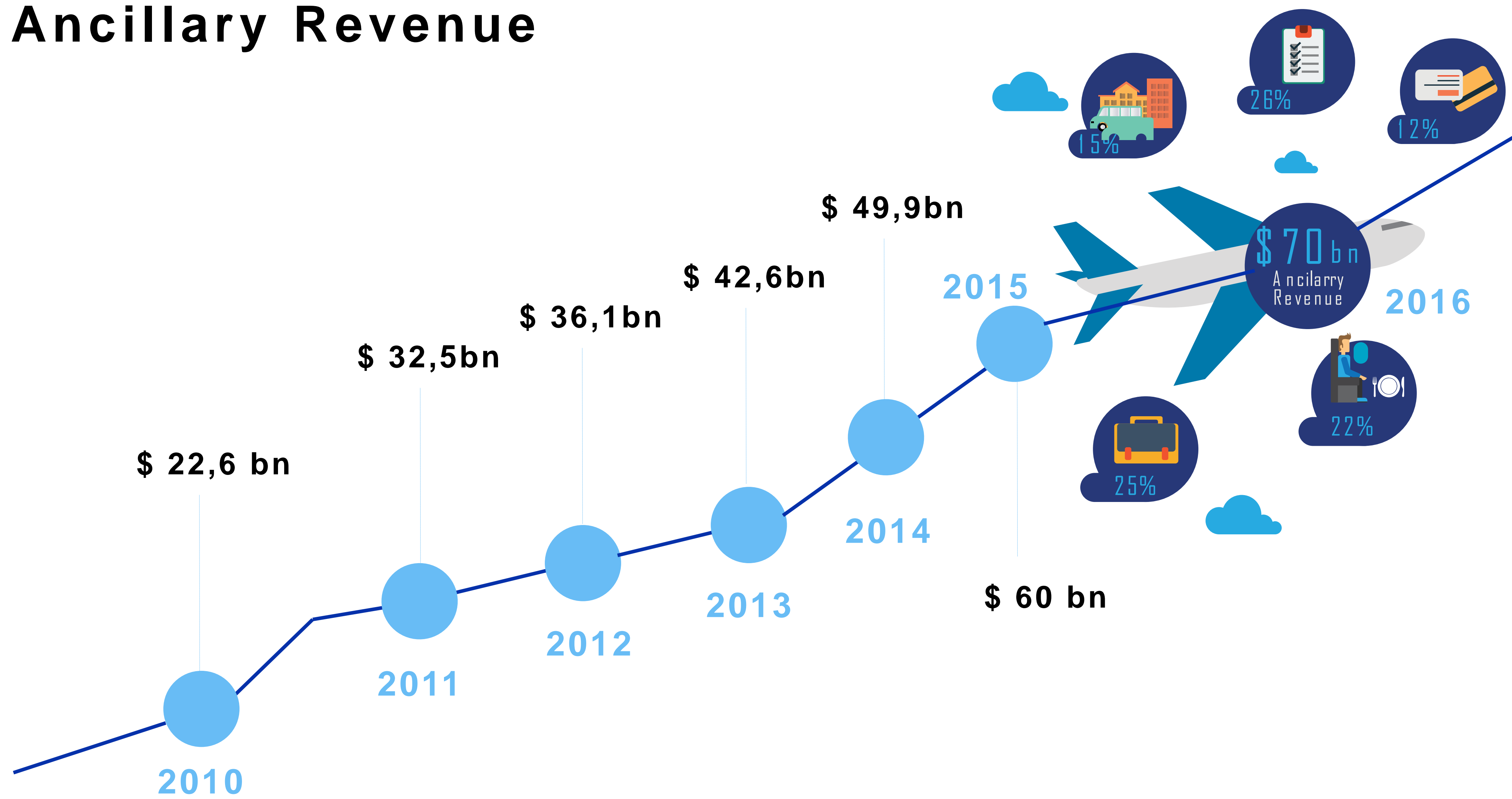
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# Travel Ecosystem





# Ancillary Revenue



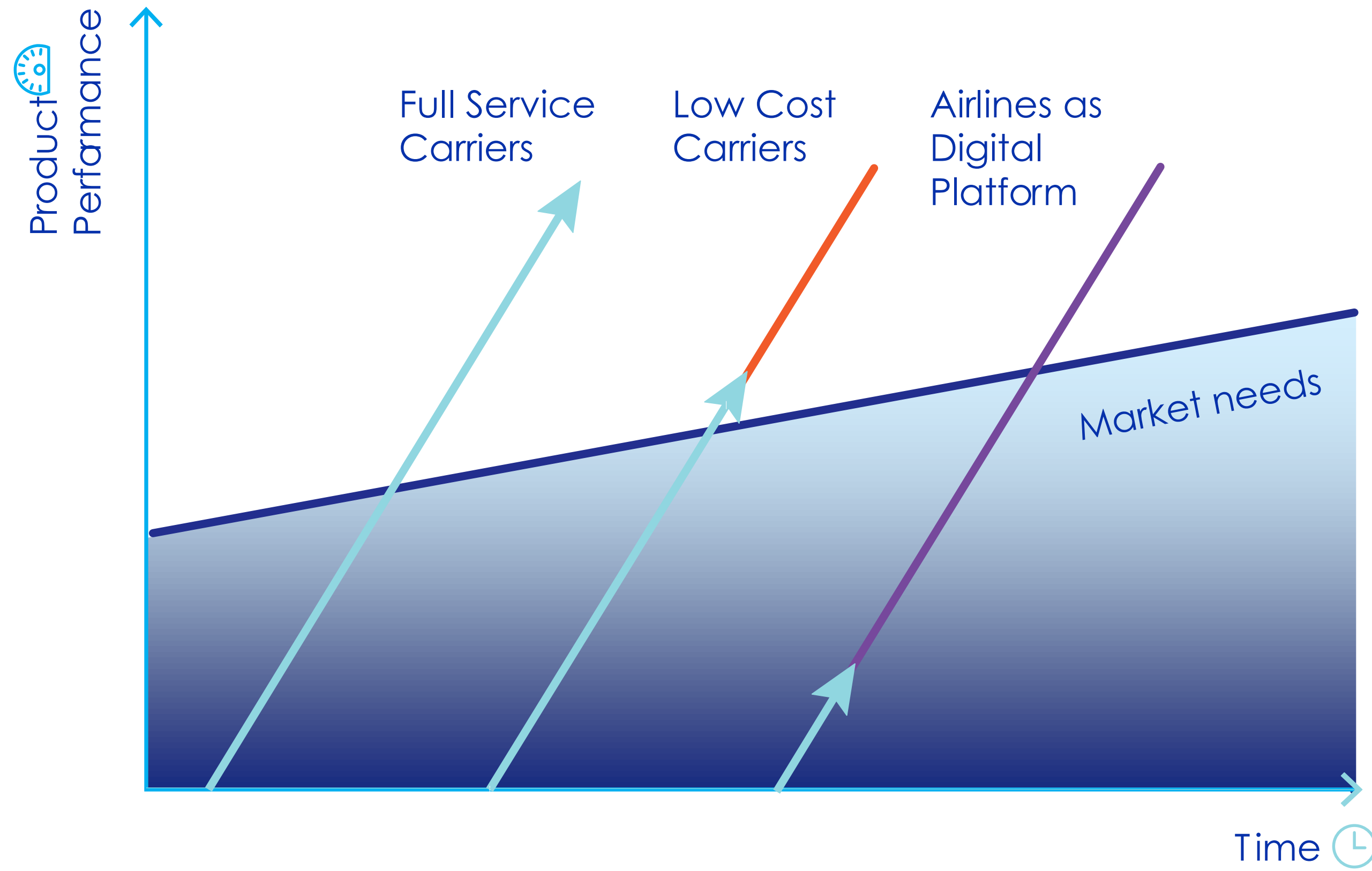


# Closed System vs. Open Marketplace



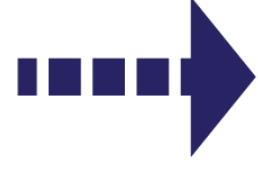
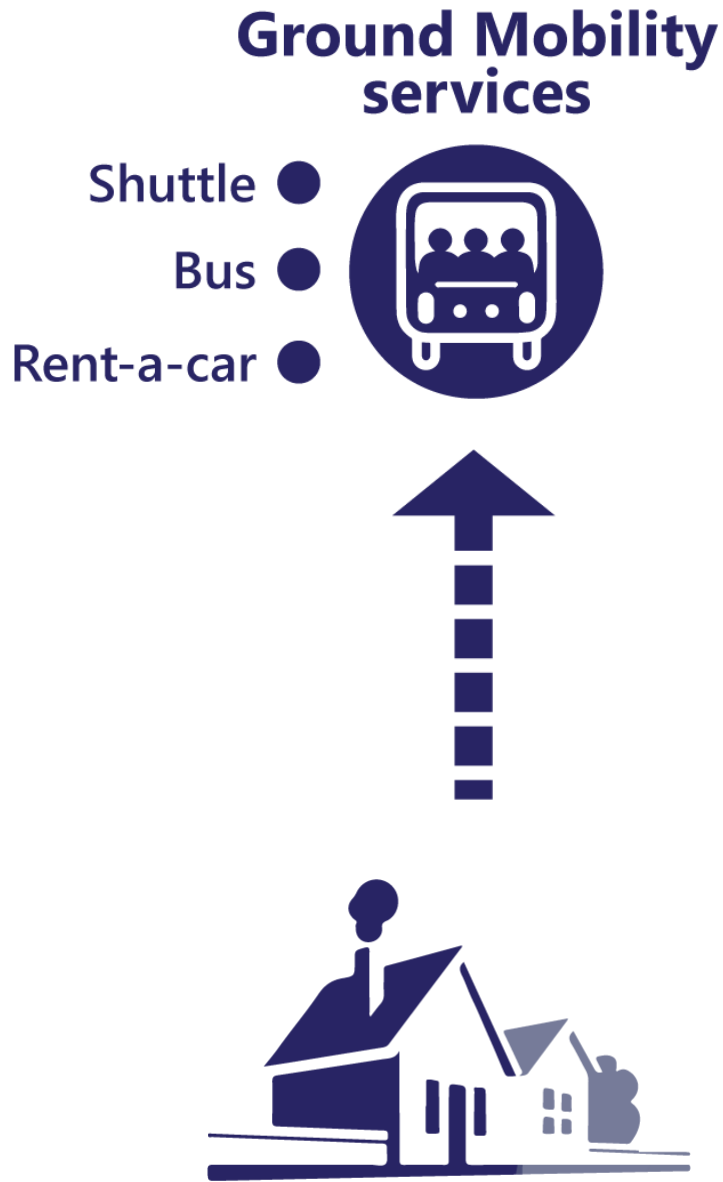


# Innovator`s Dilemma





# From Airline to Digital Travel Platform









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# MaaS Alliance Projects World Map



**Pilot Projects**



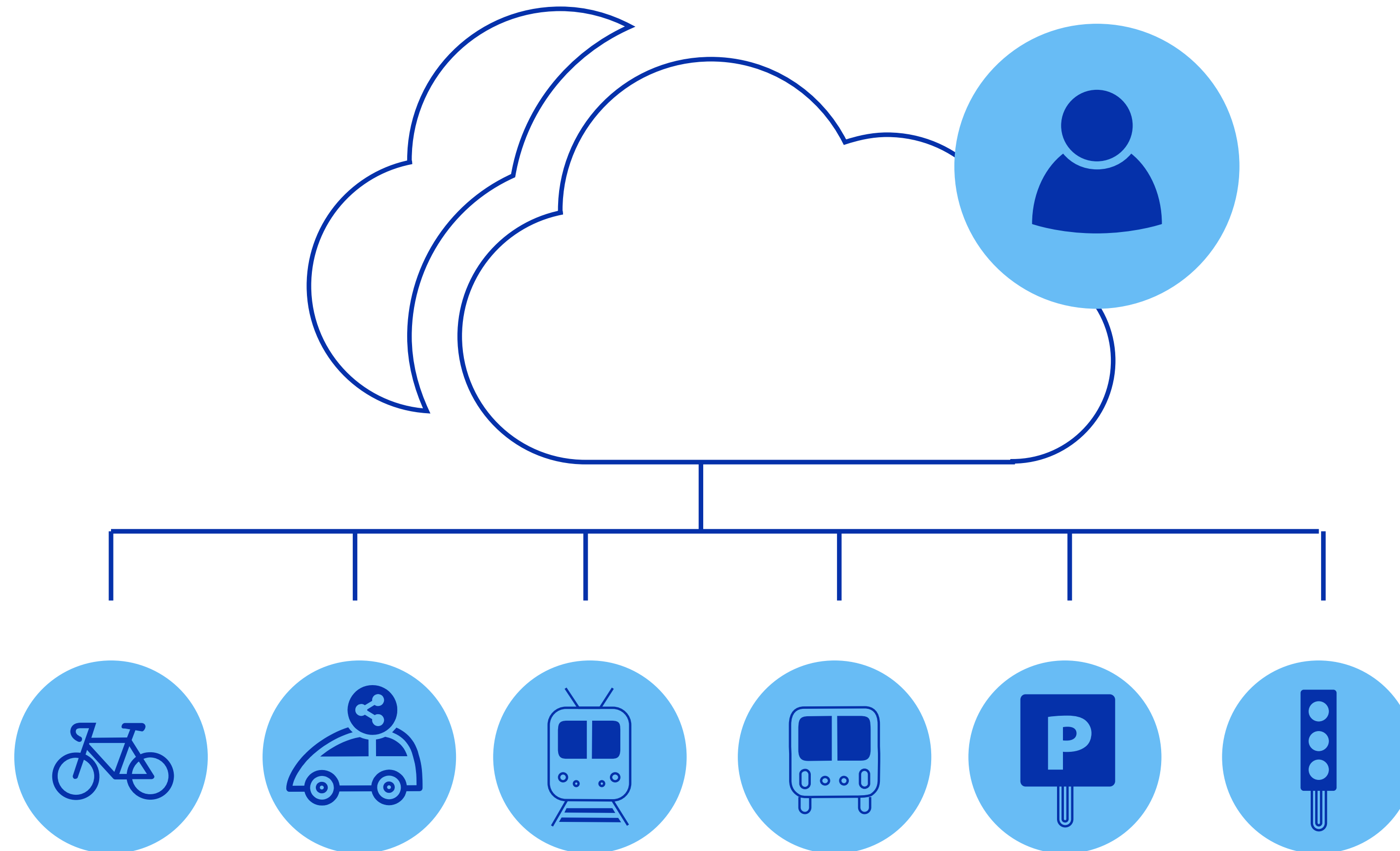
**Stakeholder**



**Insights**



# What Does It Mean For Ground Transport?





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# Vision



**Autonomous**

**Connected**

**Electric**

**Shared**



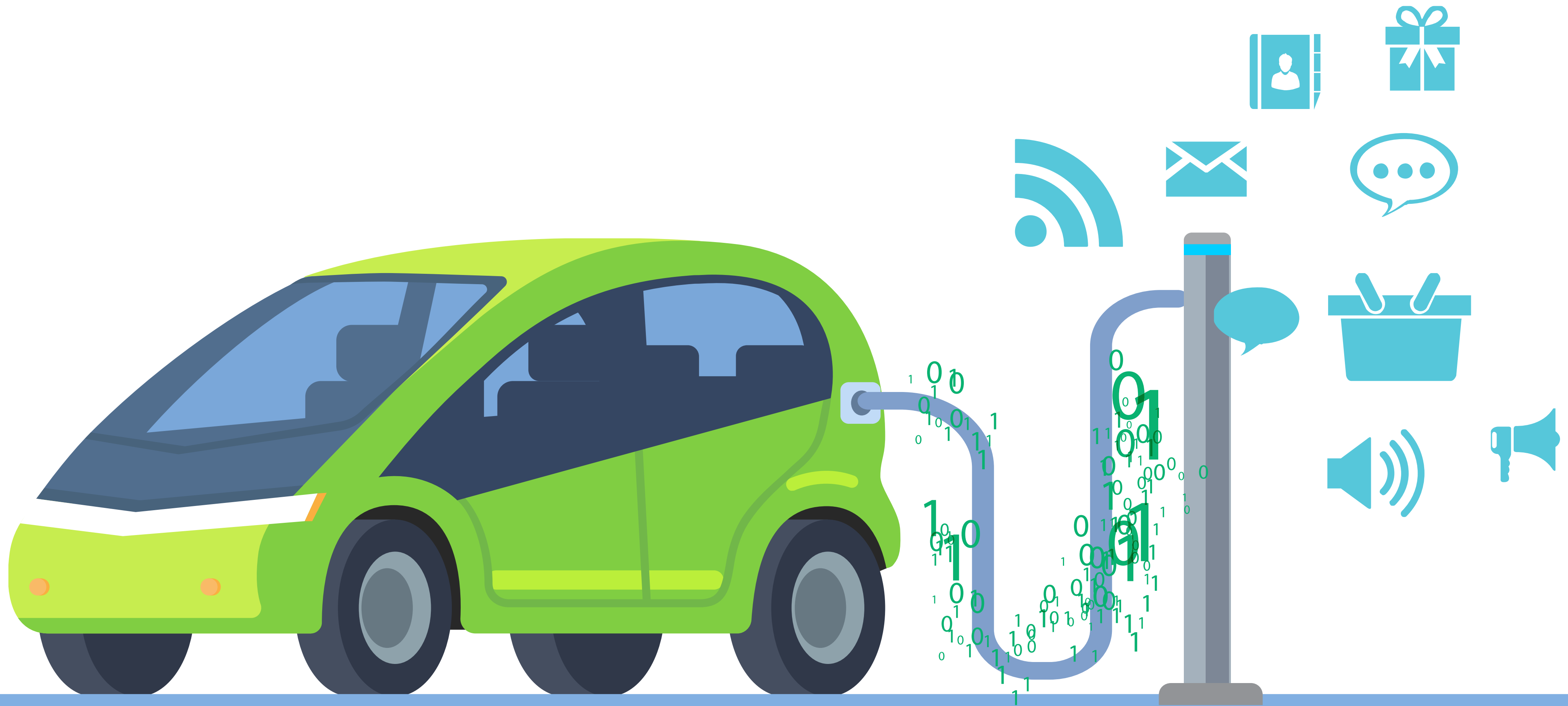
# Which Business Model Will Win?





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# Mobility Powered by Data



# Challenge of Digital Platform Economy



THE

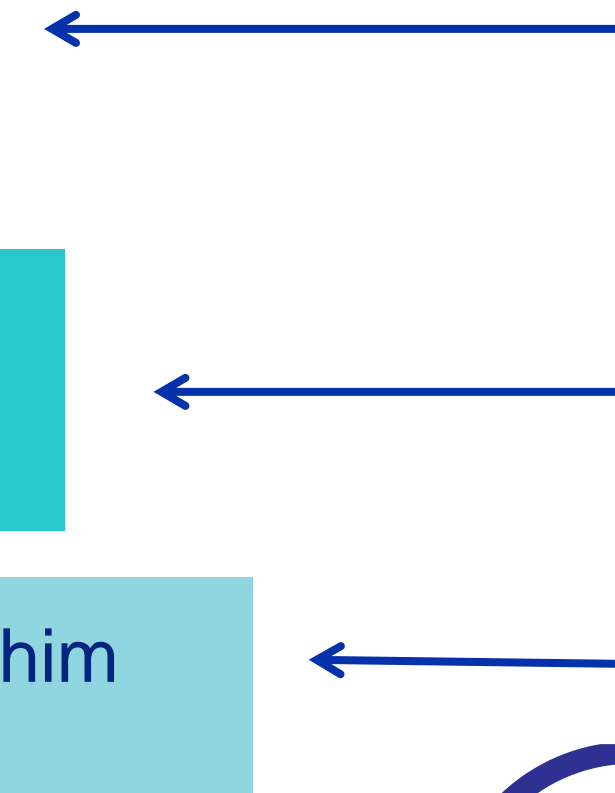
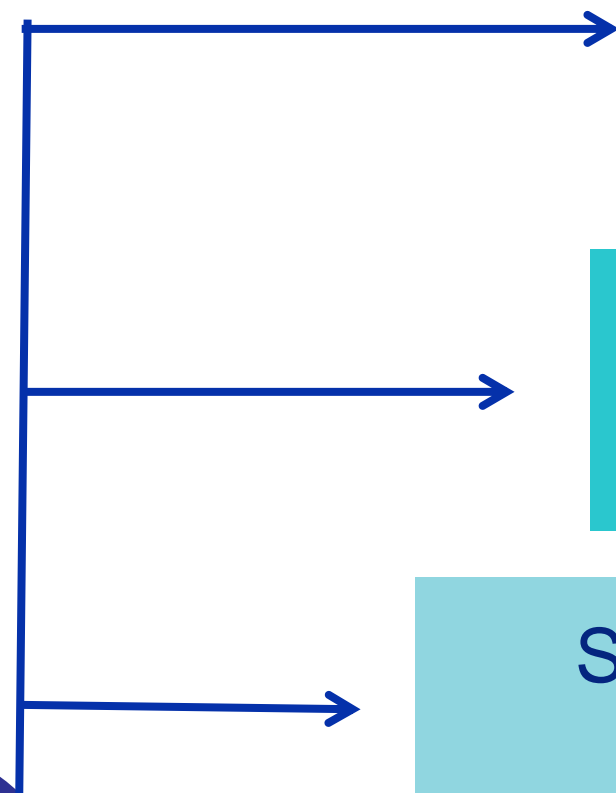
WINNER

TAKES IT ALL

Alibaba    **GOOGLE**    UBER  
Didi        Facebook    AMAZON

NETFLIX        TripAdvisor    Skyscanner    Airbnb  
WeChat   Grab    Booking.com    Ofo        Baidu    Expedia

SPOTIFY        Snapchat        drivenow        Flixbus        LinkedIn        Whim  
car2go        mytaxi        Instagram        moovel





# Conclusion

Digital API Economy is here...  
...also for ground mobility



API economy works differently



It brings many benefits, but  
there are also new challenges







# THANK YOU!

Marko.Javornik@Comtrade.com

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