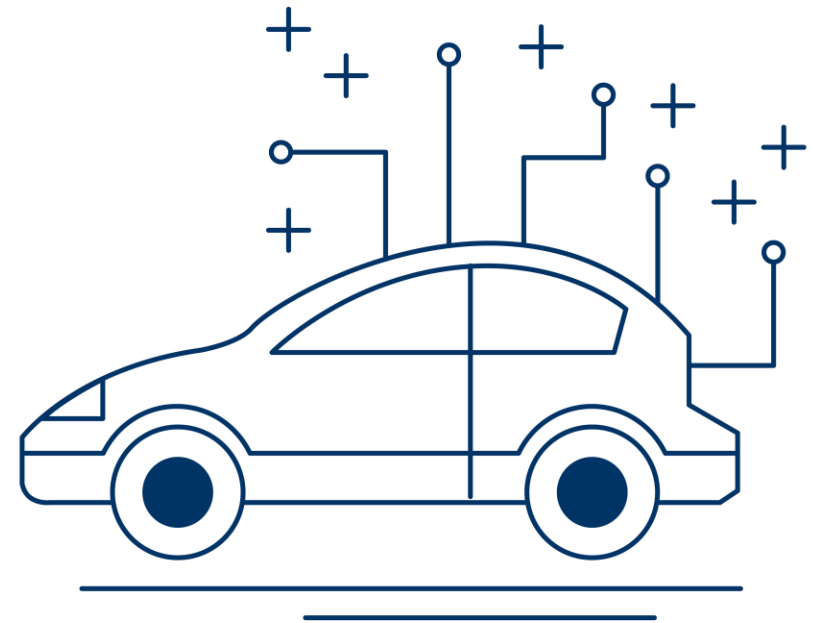


Disrupting the Car

Startups, corporates, and technologies disrupting personal car ownership in 2018 and beyond.



WITHIN 24 HOURS

Briefing recording will be distributed



The presentation will also be sent to you. Feel free to share with colleagues. The resolution of some slides may be suboptimal due to the webinar software. Those slides will look fine in the presentation that we send you.

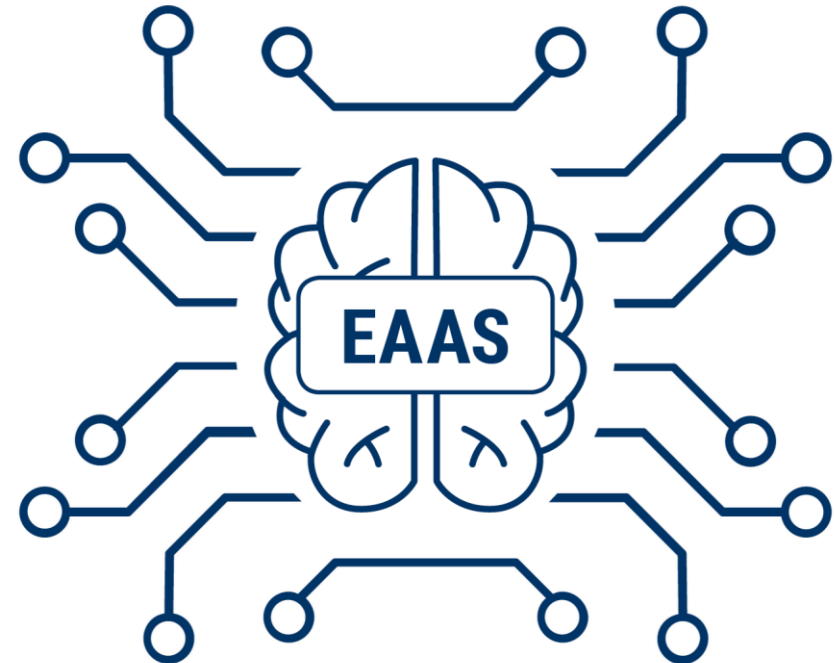
JOIN THE CONVERSATION ON TWITTER

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#CBlautotech

WHO WE ARE

The technology market intelligence platform.

CB Insights software lets you predict, discuss, and communicate emerging technology trends using data in ways that are beyond human cognition. We are a leader in the Expert Automation & Augmentation Software (EAAS) space.



TRUSTED BY THE WORLD'S LEADING COMPANIES



F-PRIME

FIRSTMARK 



NORWEST | VENTURE PARTNERS



SEQUOIA 

“We use CB Insights to find emerging trends and interesting companies that might signal a shift in technology or require us to reallocate resources.”



Beti Cung, Corporate Strategy, Microsoft



The CBI Community – Membership Has Benefits

INDUSTRY-SCALE SUMMITS



PEER-TO-PEER NETWORK

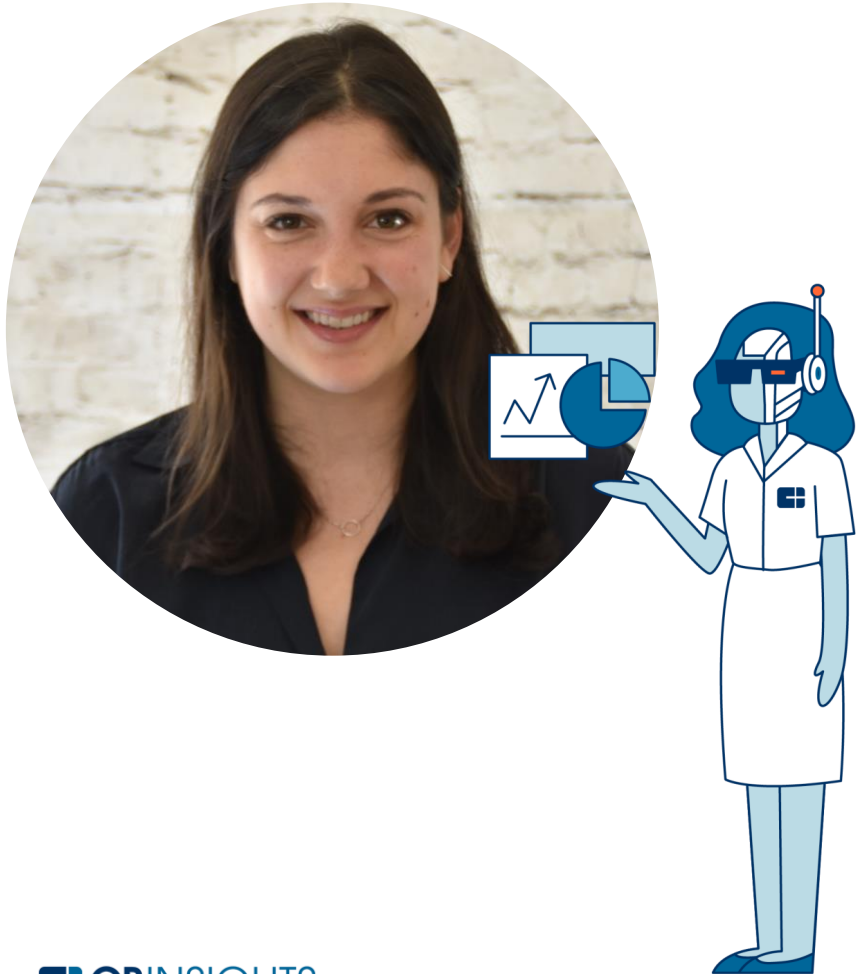


CLIENT-ONLY EVENTS



ABOUT THE ANALYST

Rachel Binder



Intelligence Associate

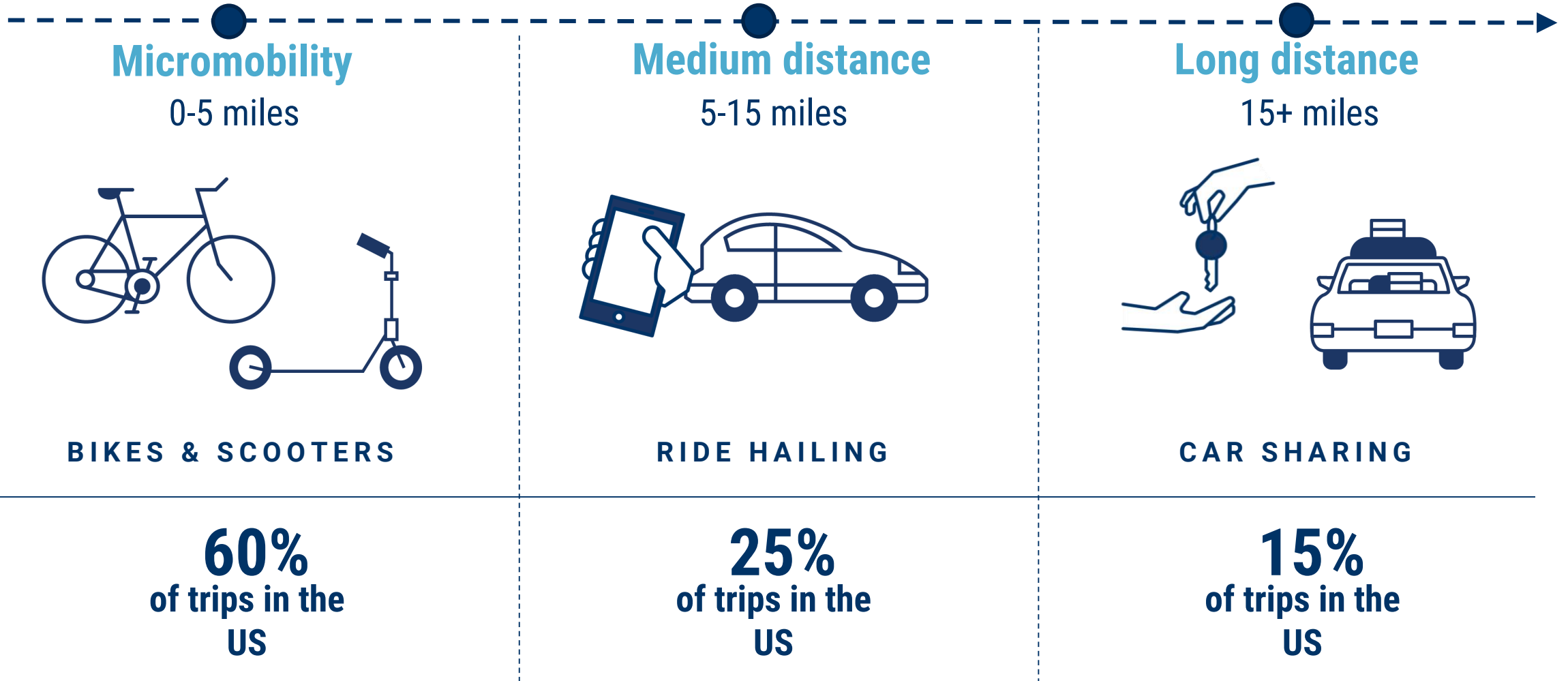
[@rachelsbinder](#) | rbinder@cbinsights.com

Rachel Binder is an intelligence associate at CB Insights covering the auto and mobility space. Prior to joining the team at CB Insights, Rachel worked in equity research at Goldman Sachs covering retail companies. Rachel graduated from Brown University with a degree in Economics.

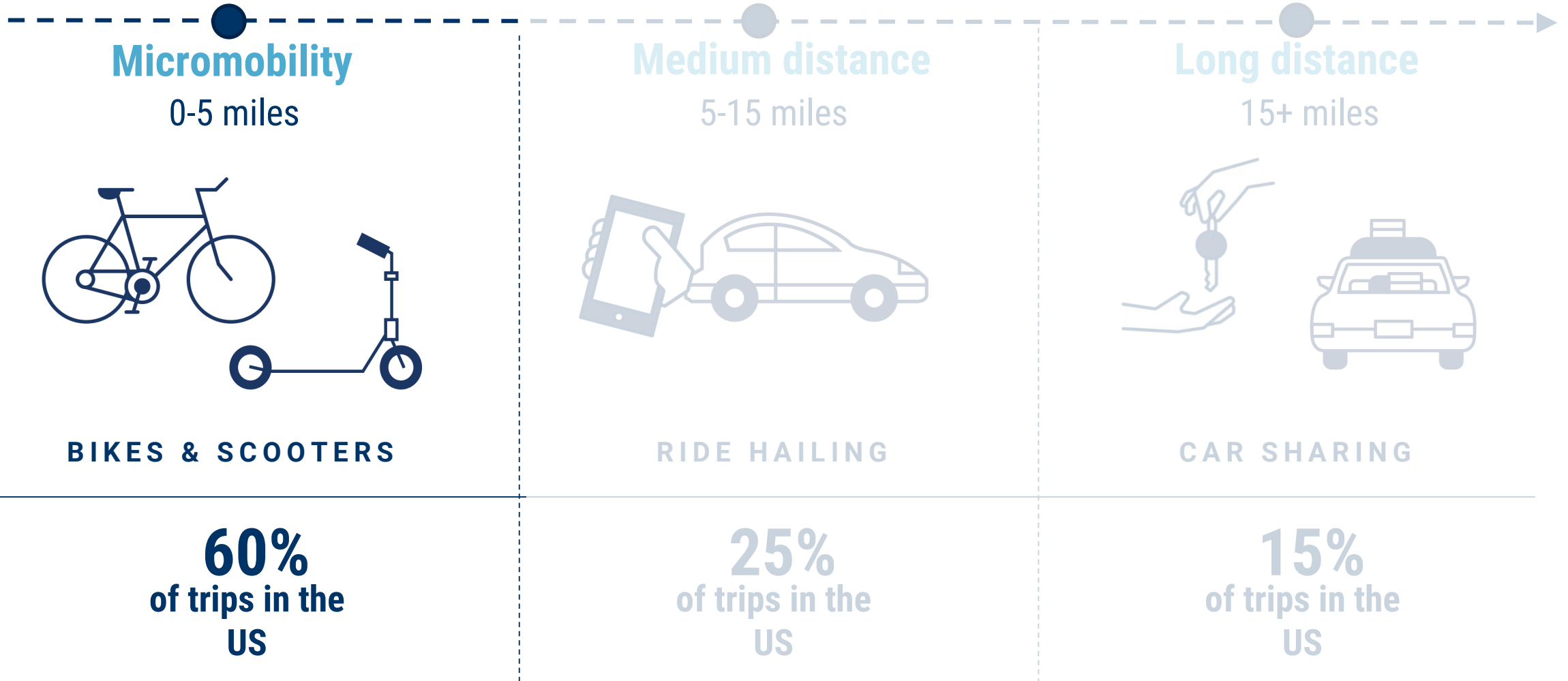
Contents

- 9** **Infographic**
Disrupting the car: Alternatives to car ownership by trip length
- 10** Short distance transport: Micromobility
- 33** Mid-length transport: Ride hailing
- 45** Long distance travel: Car sharing
- 50** What's next: Integrated transportation
- 55** What's next: Flying cars

Disrupting the car

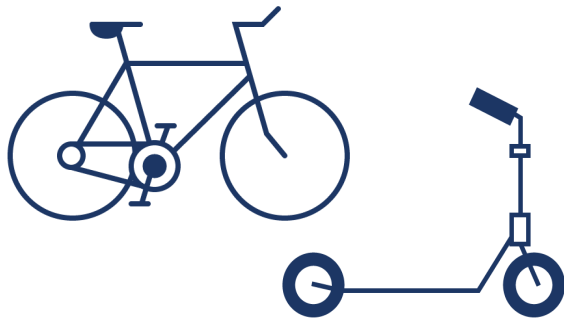


Disrupting the car



Micromobility

0-5 miles

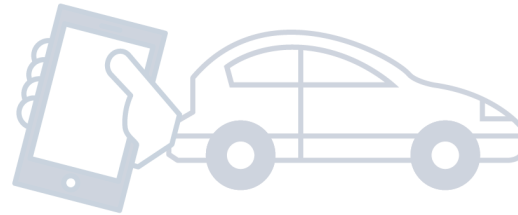


BIKES & SCOOTERS

60%
of trips in the
US

Medium distance

5-15 miles



RIDE HAILING

25%
of trips in the
US

Long distance

15+ miles



CAR SHARING

15%
of trips in the
US

Bikes and scooters explode in the US

Bike-Sharing Proliferates in U.S.

March 15, 2018 |

Bloomberg

Lyft Follows Uber Into Bike-Sharing Lane,
Buying Owner of CitiBike

July 2, 2018 |

The New York Times

Bird is the fastest startup ever to reach
a \$1 billion valuation

June 14, 2018 |

QUARTZ

Scoot Over: A Two-Wheeled Gold Rush in
Silicon Valley

June 15, 2018 |

THE WALL STREET JOURNAL.

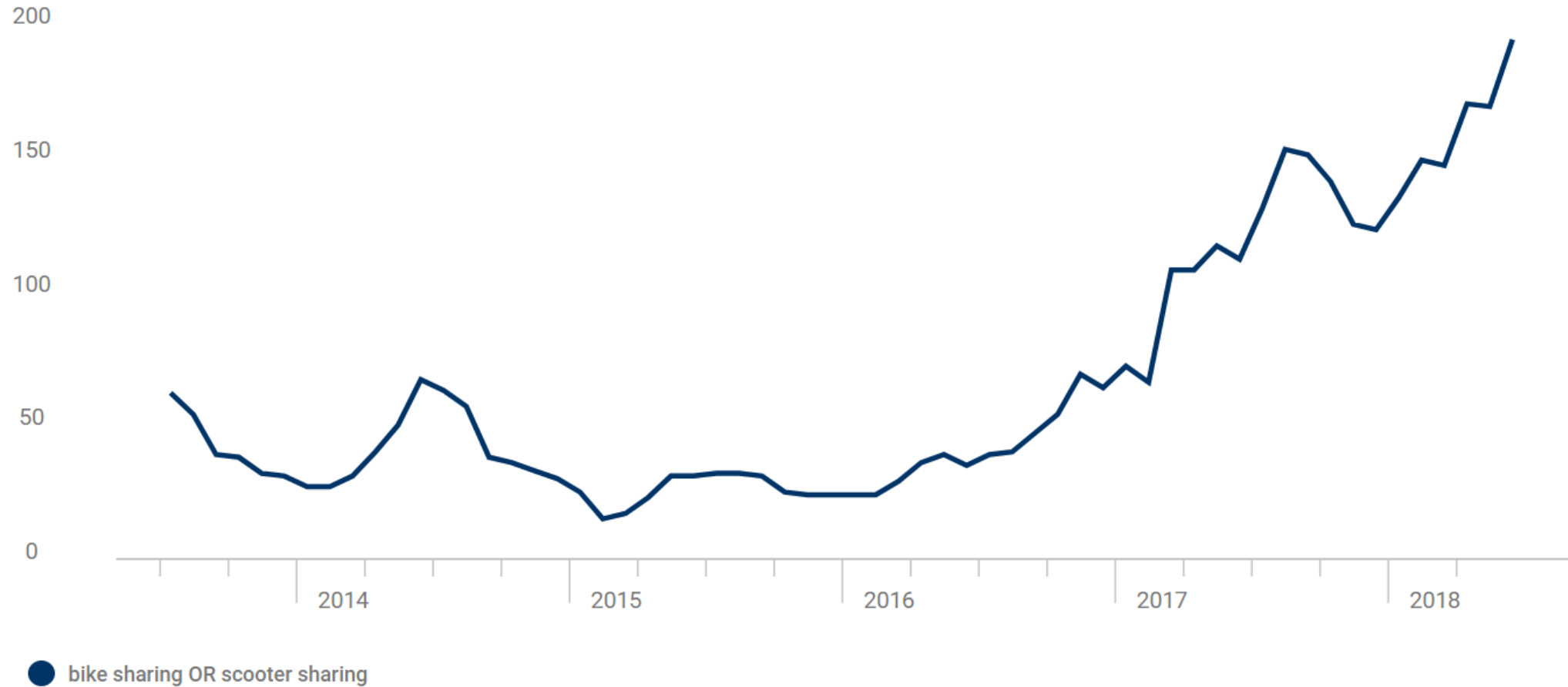
Part Uber, Part FOMO: Investors Are In A
Frenzy Over Transportation Startups
Again

June 29, 2018 |

Forbes

Bikes & scooters top-of-mind in recent weeks

News Coverage



A new ecosystem emerges

A number of startups are working on shared vehicle networks, vehicle design, and charging infrastructure for bicycles, scooters, mopeds, and other compact vehicles for one to two passengers.

Bike and scooter tech market map



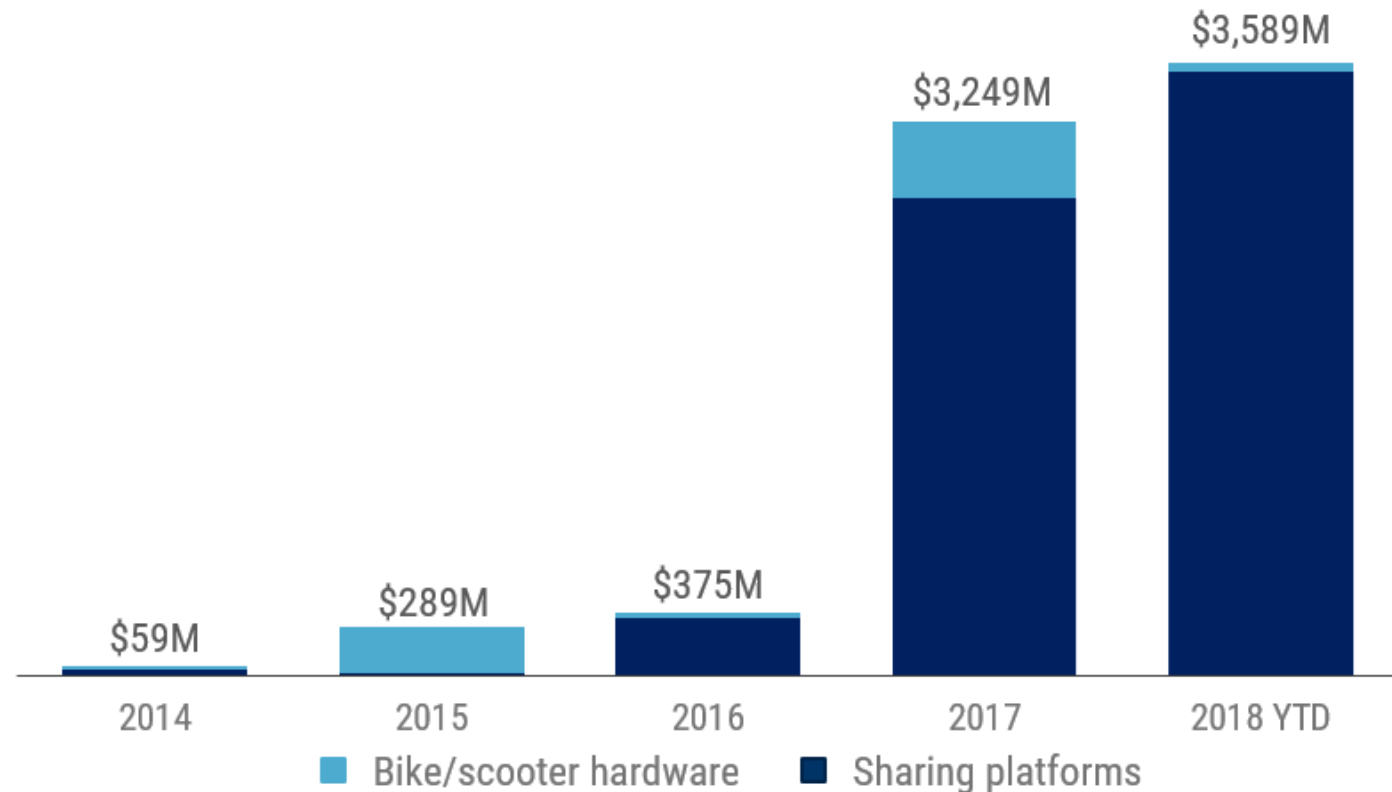
Funding goes to sharing platforms rather than manufacturers

Startups operating shared bike and scooter services have gained traction more quickly than manufacturers by offering access to bikes and scooters without the inconveniences of ownership.



Sharing services drive bulk of bike/scooter funding

Deal activity from 2014-2018TD (7/10/2018)

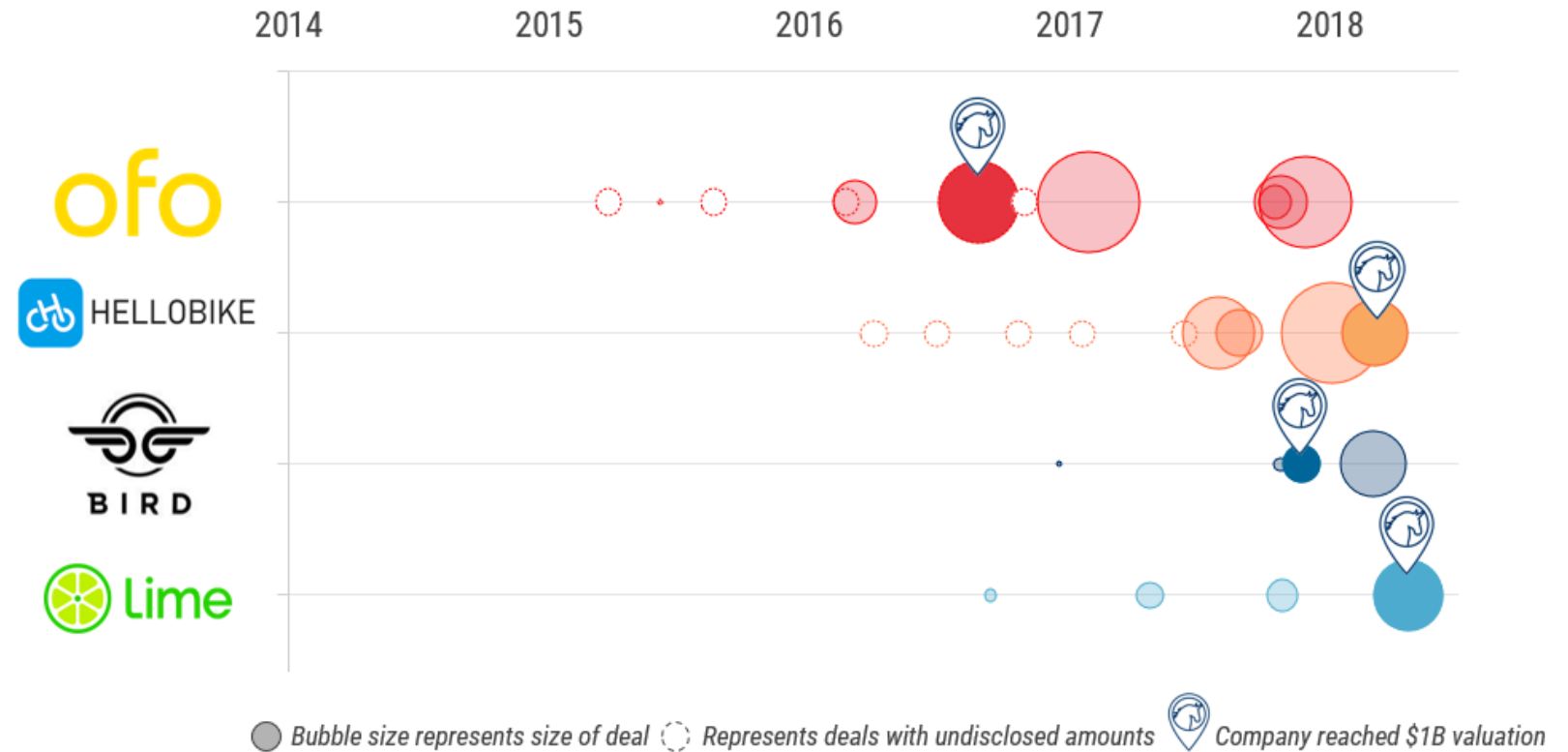


Investors search for the next Uber or Didi

Funding timeline for bike/scooter-sharing unicorns

2014 - 2018 YTD (as of 7/11/18)

A number of unicorns have emerged as investors focus on the largest, most dominant platforms.



Why bikes and scooters, and why now?

1

ADDRESSING THE FIRST/LAST MILE

Cities are getting more congested due to urban migration, but fewer people are using public transport, creating more traffic on the roads.

Bikes and scooters can connect multiple points of transit to facilitate the use of public transport and replace cars for shorter-distance trips.

2

THE RISE OF DOCKLESS SYSTEMS

A confluence of maturing technologies – namely mobile payments, IoT, and GPS – **has allowed companies to launch dockless sharing platforms.**

Dockless systems are more convenient for the user and also require lower capital costs for platform operators, making it easier to scale and maintain profitability.

3

ELECTRIC VEHICLES CAN FINALLY SCALE

Battery costs for electric vehicles are falling and are expected to continue to drop moving forward.

Lower manufacturing costs will make electric bikes and scooters more affordable, allowing sharing platforms to more cost-effectively scale their systems.

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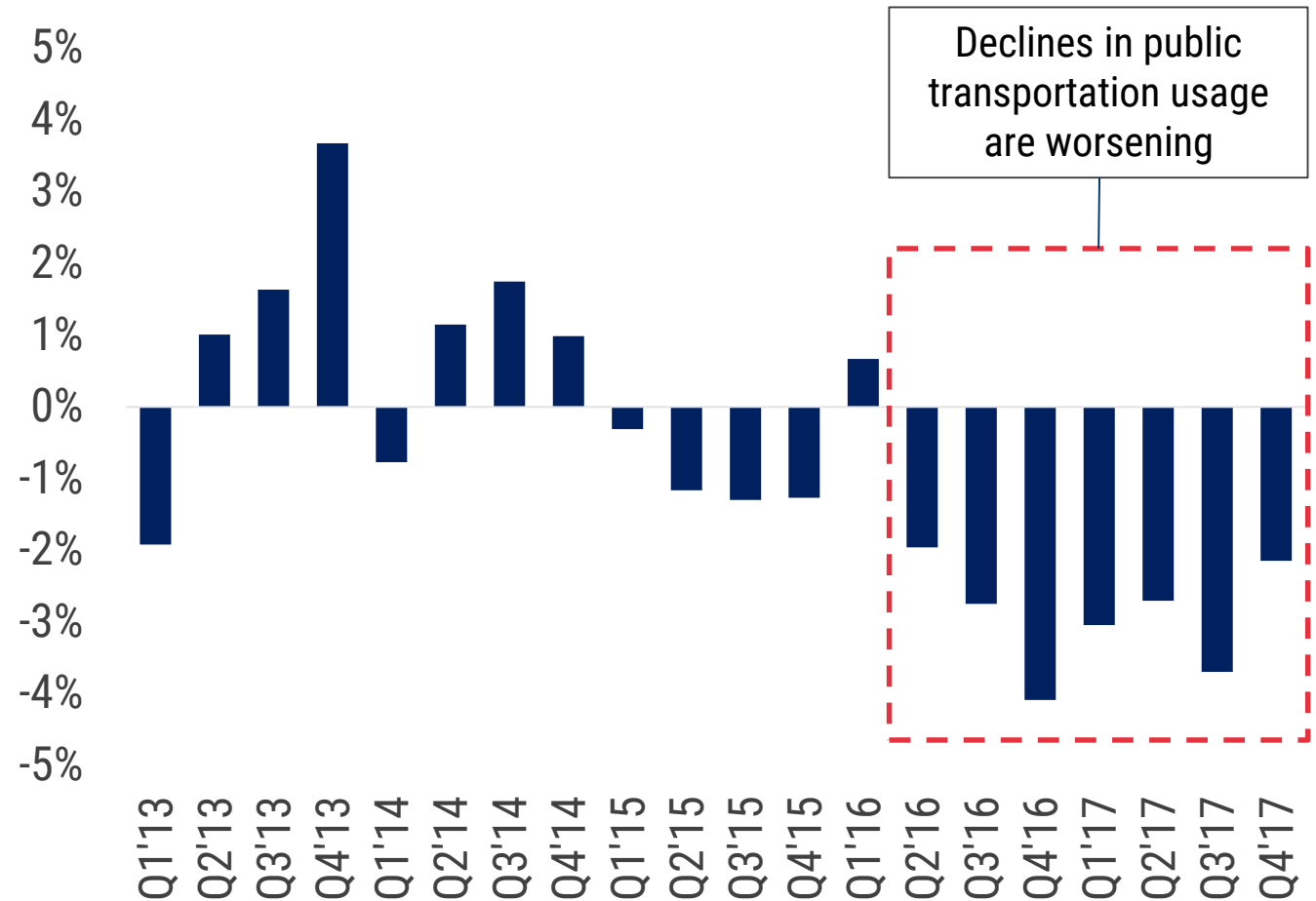
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Fewer people are using public transportation

More people are moving to cities, but fewer people are using public transportation with the rise of ride hailing and historically lower gas prices.

Catering to first- and last-mile transport, **bikes and scooters help commuters access public transportation that's too far away to reach by walking**, which could help encourage usage.



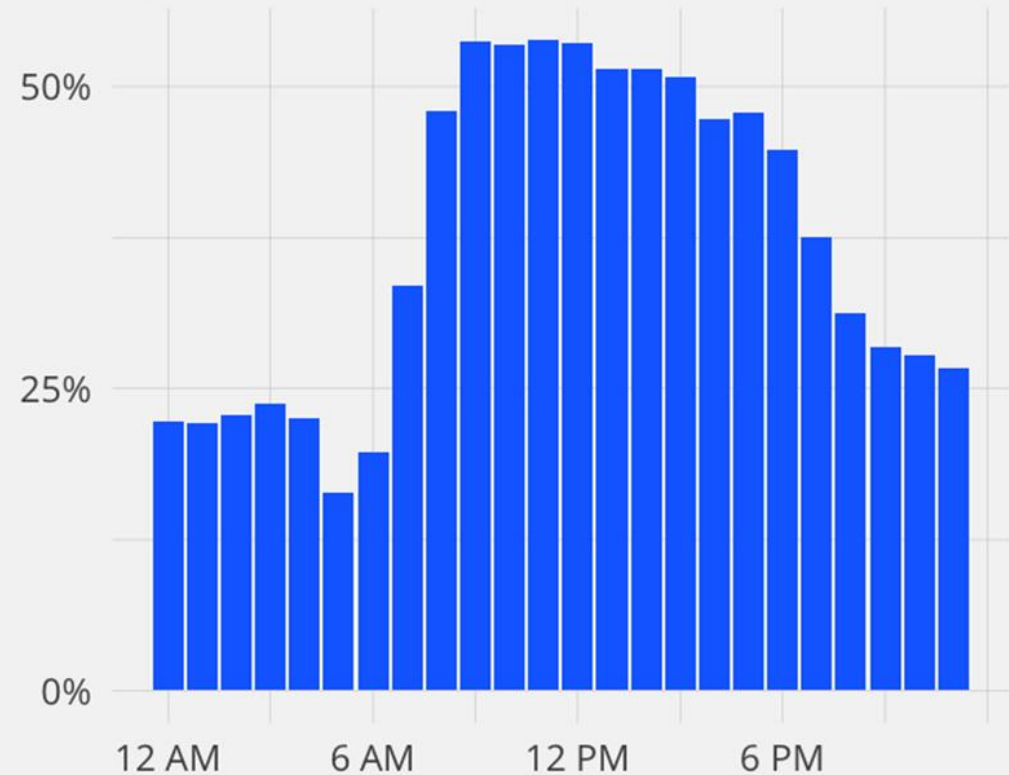
Micromobility proves to be more efficient

As traffic levels worsen, bikes and scooters are offering a more efficient alternative.

Studies show that **during the week, riding a Citi Bike is faster than a taxi** in New York City, most notably during peak hours of transport.

When Citi Bikes are faster than taxis

% of taxi trips taken weekdays within Citi Bike service area expected to be faster if switched to Citi Bike



Data via NYC TLC and Citi Bike
toddschneider.com

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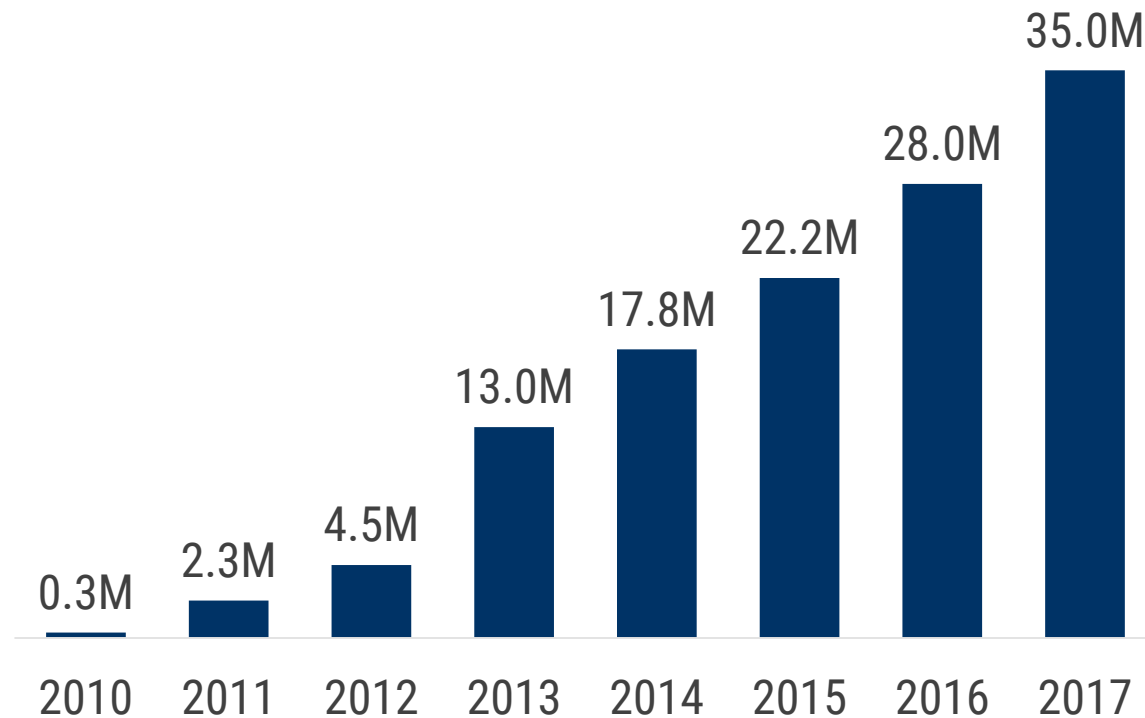
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Dockless systems create opportunity in the US



Bike-share trips in the US continue to climb higher

Bike-share trips on fixed station and dockless bike-sharing platforms in the US

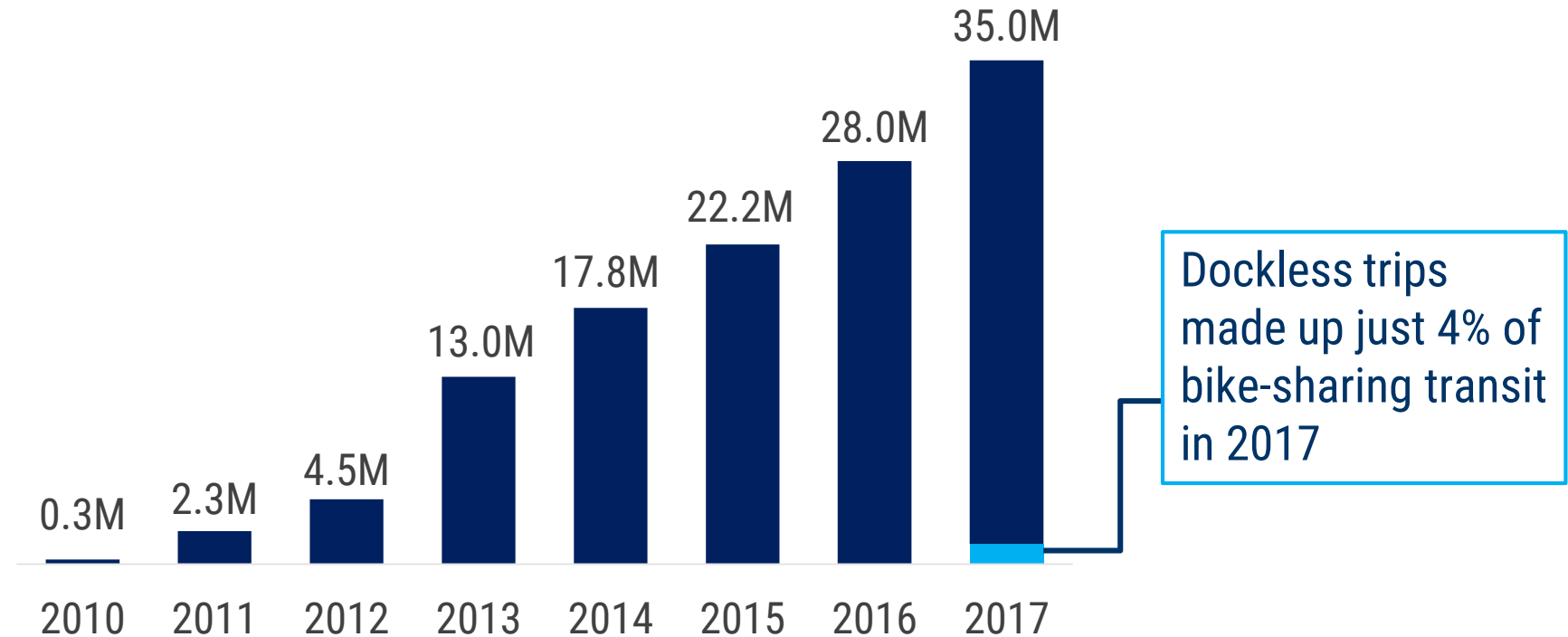


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Bike-share trips on fixed station and dockless bike-sharing platforms in the US



NEW YORK CITY MOVES DOCKLESS, ELECTRIC

NYC partners with Jump to pilot dockless e-bike sharing

JUMP



This summer, New York City is partnering with Uber's Jump Bikes to launch a **dockless electric bike-sharing service** in the Bronx and Staten Island, two areas underserved by the prevailing platform CitiBike.

STARTUPS HELP MANAGE THE DOCKLESS SYSTEM

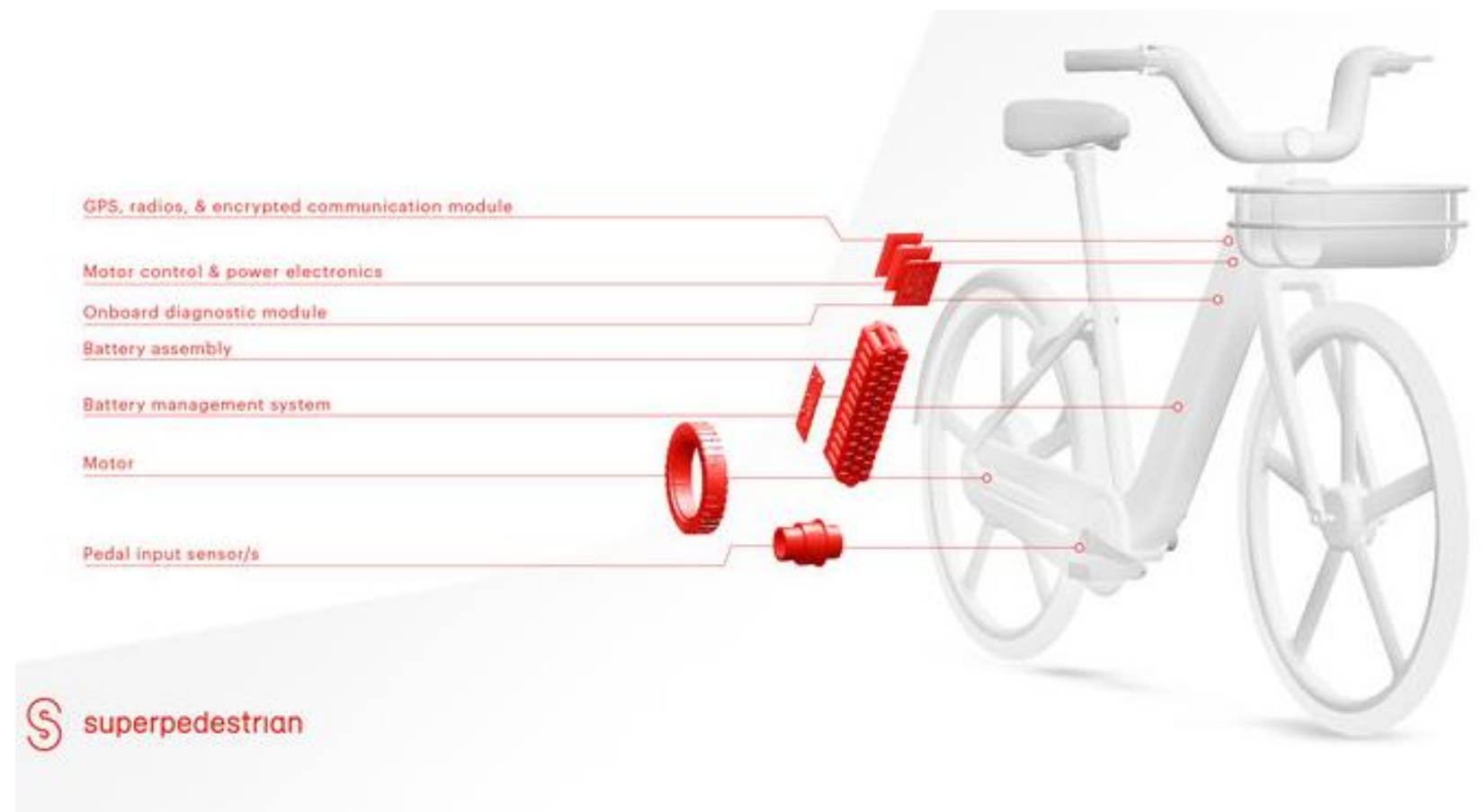
S superpedestrian

Funding: \$22M

Select investors: General Catalyst

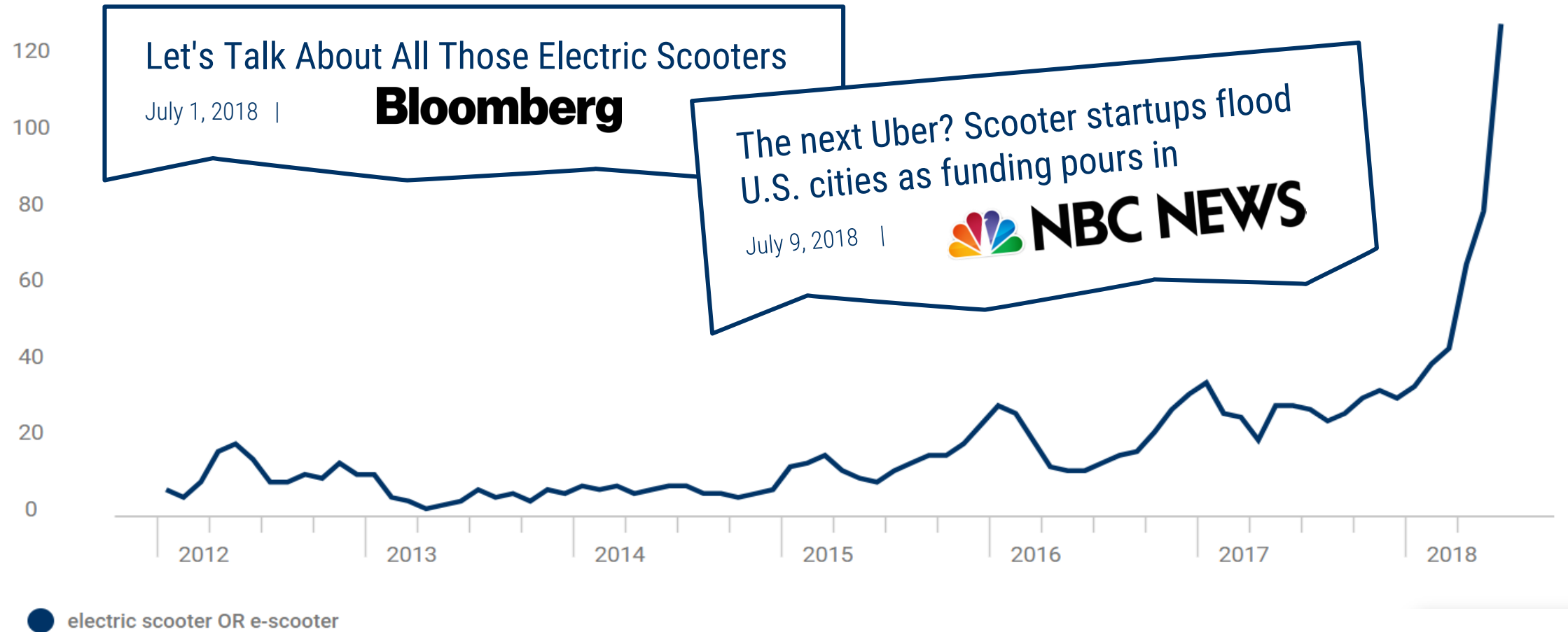
Superpedestrian is known for its Copenhagen Wheel replacement that can **convert a traditional bike into an e-bike.**

The company is now also developing sensors and software to **help bike/scooter-sharing platforms manage their fleets.**



Dockless system gives rise to scooter-sharing

News Coverage



Scooter startup valuations skyrocket

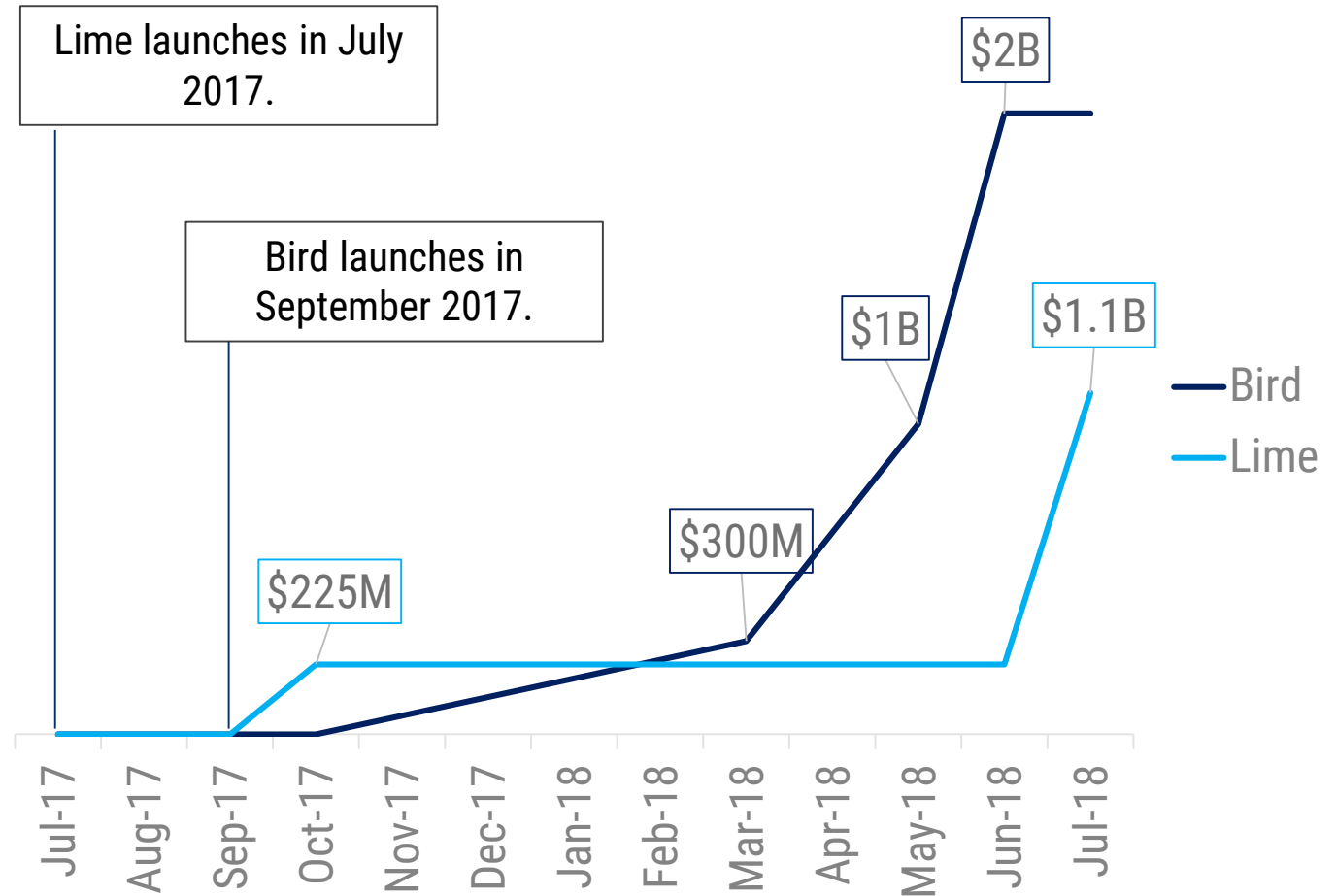
Bird Rides reached a \$1B valuation within just eight months of launching, the fastest timeline for any startup to reach unicorn status.

Lime, Bird's largest US-based competitor, has also picked up steam in recent months, jumping to a \$1.1B valuation in May from \$225M in October.



Bird and Lime reach unicorn status in a matter of months

Private market valuations for scooter startups Bird and Lime



SCOOTERS > BIKES?

Spin pivots to scooters

SPIN

Disclosed Funding: \$133M

Select Investors: Grishin Robotics

Spin originated as an electric bike-sharing platform.

The company recently announced it was **pivoting from electric bikes to electric scooters.**

Spin's co-founder Euwyn Poon has said that the company has seen **10 to 20 times higher demand for its scooters** than its bikes.

The company announced in June that it was finalizing a \$125M blockchain-based security token offering (STO) which is tied to company revenue rather than cryptocur



SETTING THE BOUNDS

Regulation is necessary but complicated

In China, **lax regulation around dockless bikes allowed companies to pile in** and aggressively expand, leading to an **oversupplied, mismanaged** bike-sharing ecosystem.



In the US, **dockless electric scooters are now littering streets and sidewalks** in a number of cities, as e-scooters are largely unregulated.

In response, cities are firing back.



SETTING THE BOUNDS

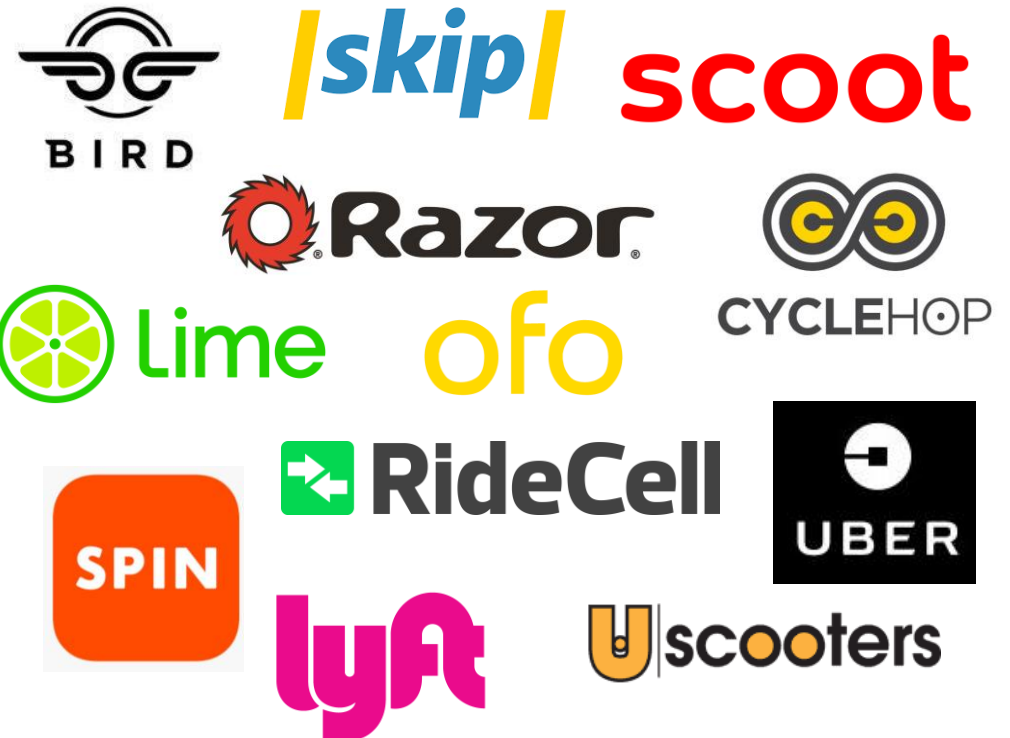
Bike- and scooter-sharing is a land grab

Similar to ride hailing, **bike- and scooter-sharing is a land grab.**

Outside of price, **users care most about convenience**, which can only be achieved with **efficient supply.**

As new regulations cap the number of companies that can operate in a city, **regulation could provide a moat** if a company gets a permit early on.

San Francisco is providing permits to just 5 scooter companies, even though 12 applied



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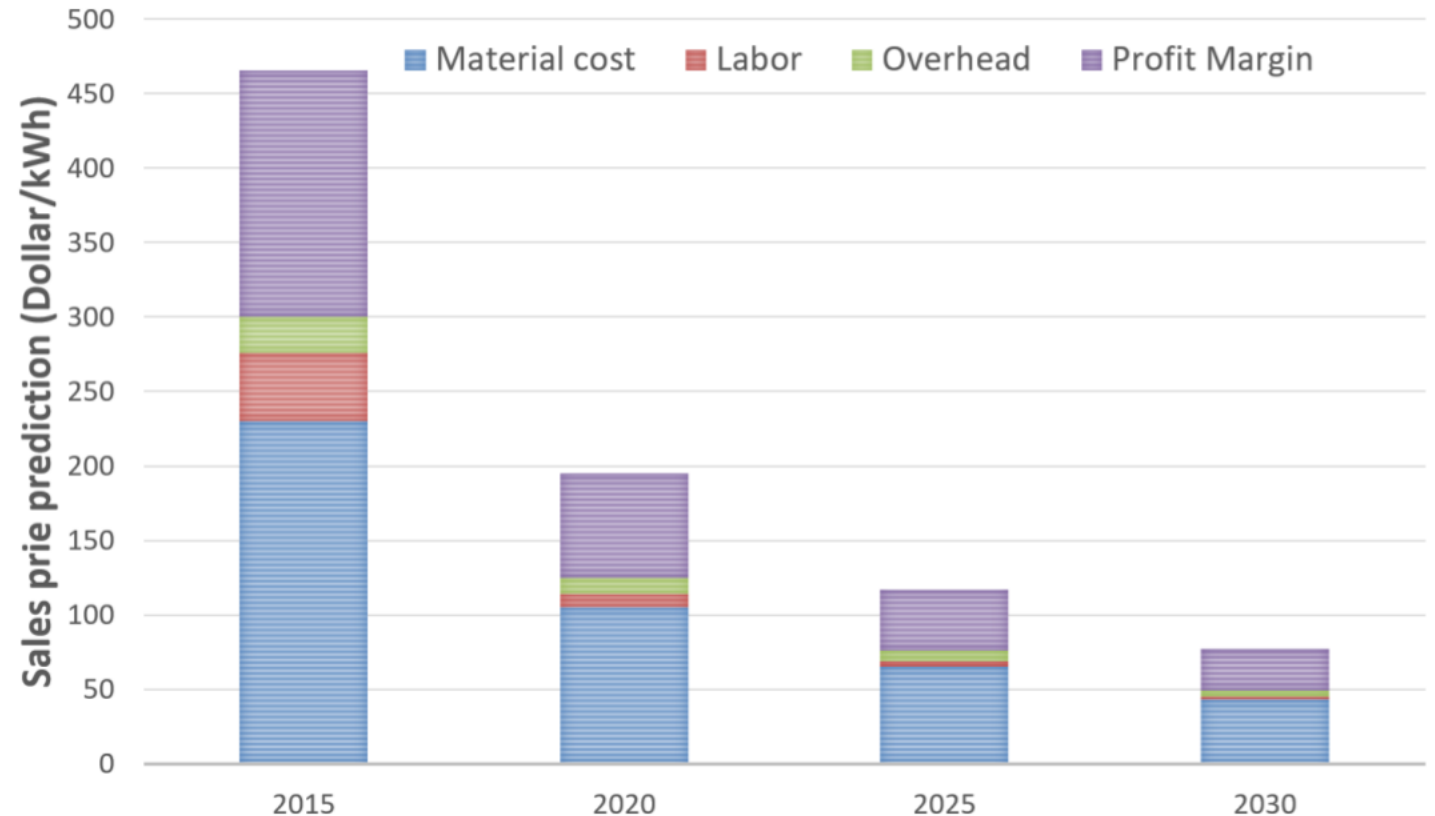
Battery costs for electric vehicles are falling and are expected to continue to drop moving forward.

Lower manufacturing costs will make electric bikes and scooters more affordable, allowing sharing platforms to more cost-effectively scale their systems.

Batteries cheaper to make, EVs easier to scale

Multiple factors are expected to **drive down the cost of manufacturing** a lithium-ion battery:

1. Improvements in material sciences
2. Maturing of the battery market
3. Higher production of electric vehicles



STARTUPS INNOVATING IN BATTERY TECH

gogoro

Funding: \$480M

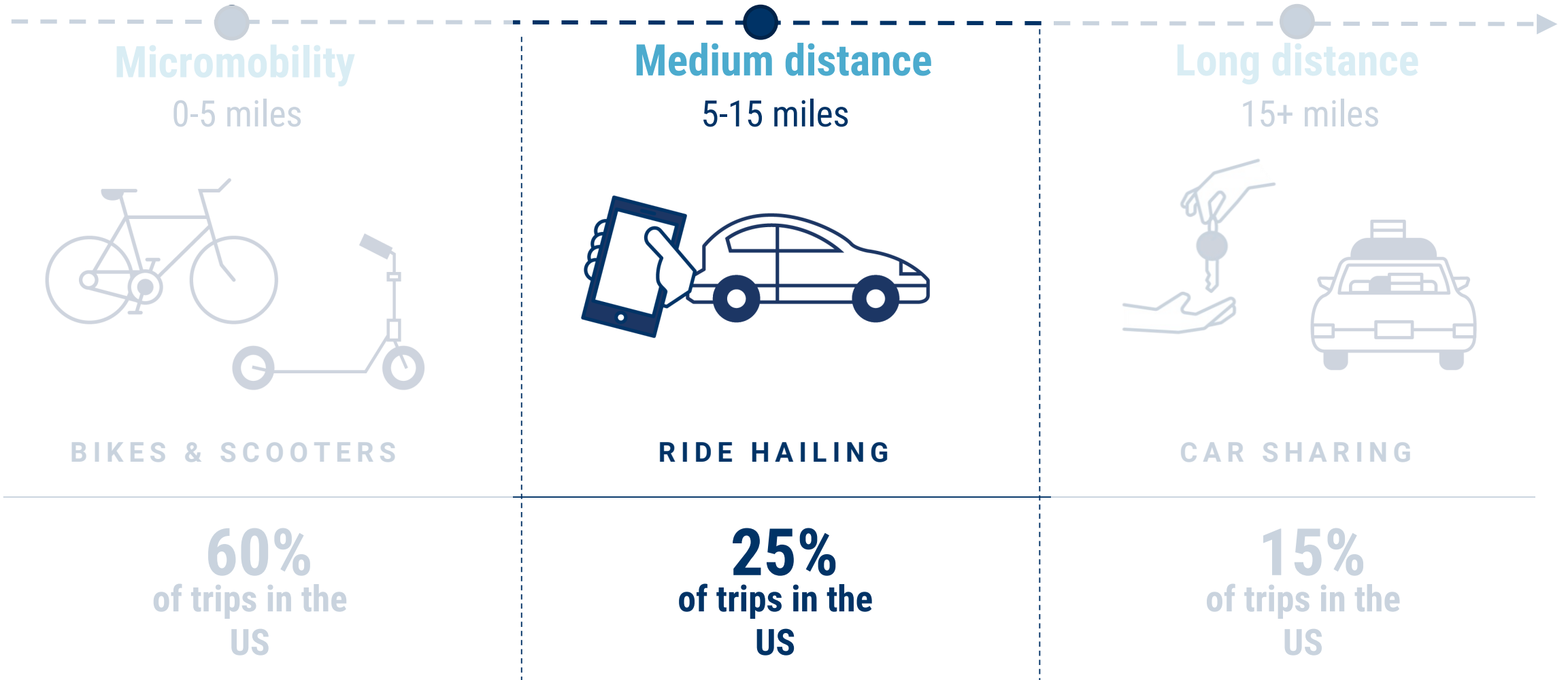
Select investors: Panasonic Ventures, Sumitomo, ENGIE

Gogoro manufactures smart electric scooters that use swappable batteries, which lowers the cost of the scooters.

The company has also developed a **battery swapping infrastructure**, which reduces the number of batteries in circulation.



Unbundling mobility services by trip length



Drivers for ride hailing

1

LIMITATIONS OF PUBLIC TRANSPORT

The majority of people using ride hailing services tend to use them at times when **public transport is either infrequent or unreliable.**

Ride hailing platforms can serve as a fill in for mid-length transit that public transportation is ill-equipped to handle.

2

CONVENIENCE WITHOUT MAINTENANCE

Studies suggest that at least **a portion of ride sharers are opting out of car ownership** for ride hailing services.

Subscription services will likely make it even more economical to turn to ride sharing.

3

ELECTRIC AND DRIVERLESS CARS

Electric vehicles require much lower costs in terms of fuel and maintenance, which can help lower the cost of ride sharing.

Using self-driving cars, ride hailing companies also **save on the cost of a human driver,** which allows them to further lower fares.

Eventually, **electric and autonomous ride hailing** has the potential to be **more cost effective** than ownership.

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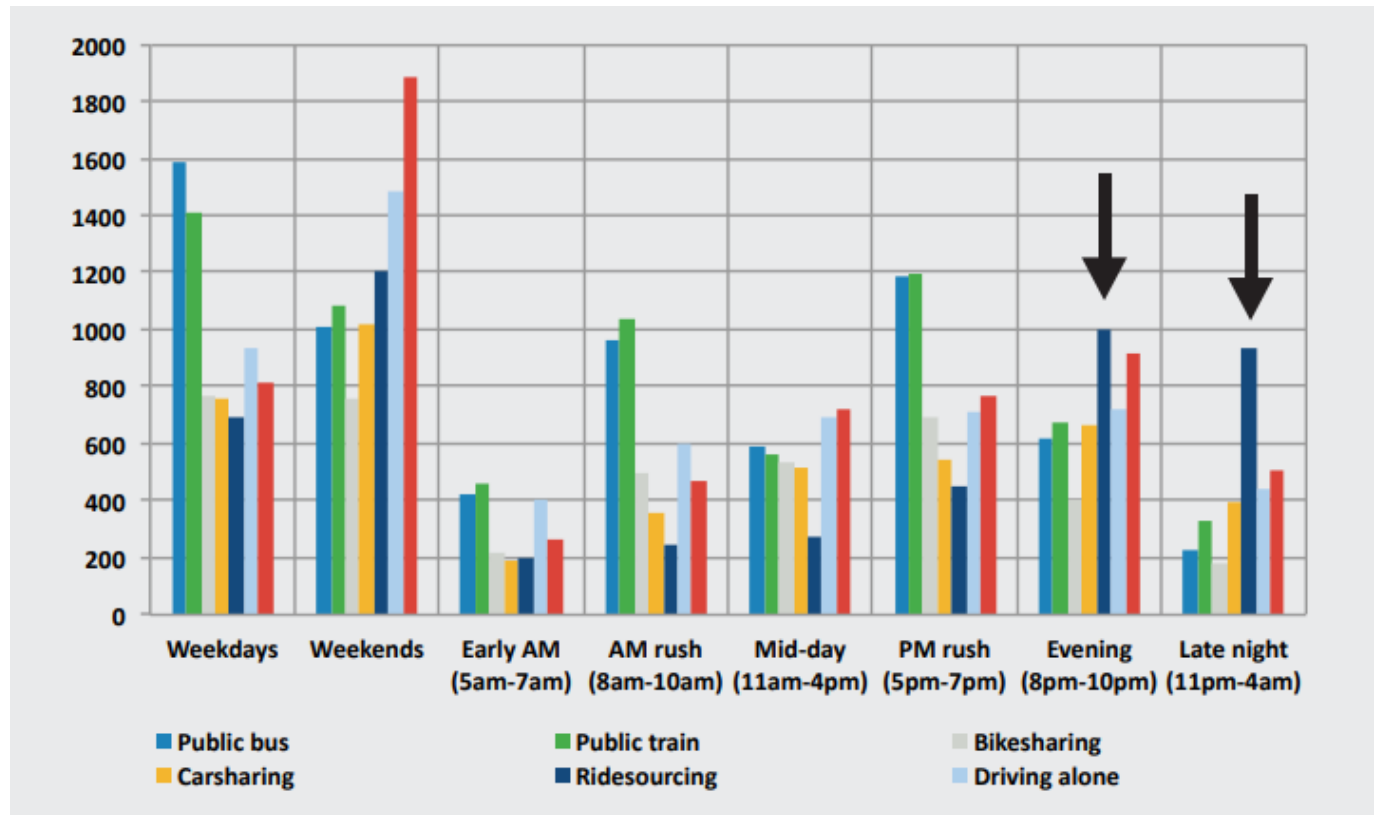
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Ride hailing complements public transport



When asked when they most often use different forms of transport, **ride hailing was the most popular choice during the evening/late-night**, when public transportation is typically lacking.

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Hailing services reduce personal miles driven

Lyft's annual economic report found the following in 2017:

250,000 Lyft customers gave up personal vehicles in favor of Lyft's service

50% of Lyft users reported driving their own car less

34% of Lyft users say they would avoid owning a car entirely because of Lyft



Ride sharing is a viable alternative to owning

Users of shared transport are

More likely to

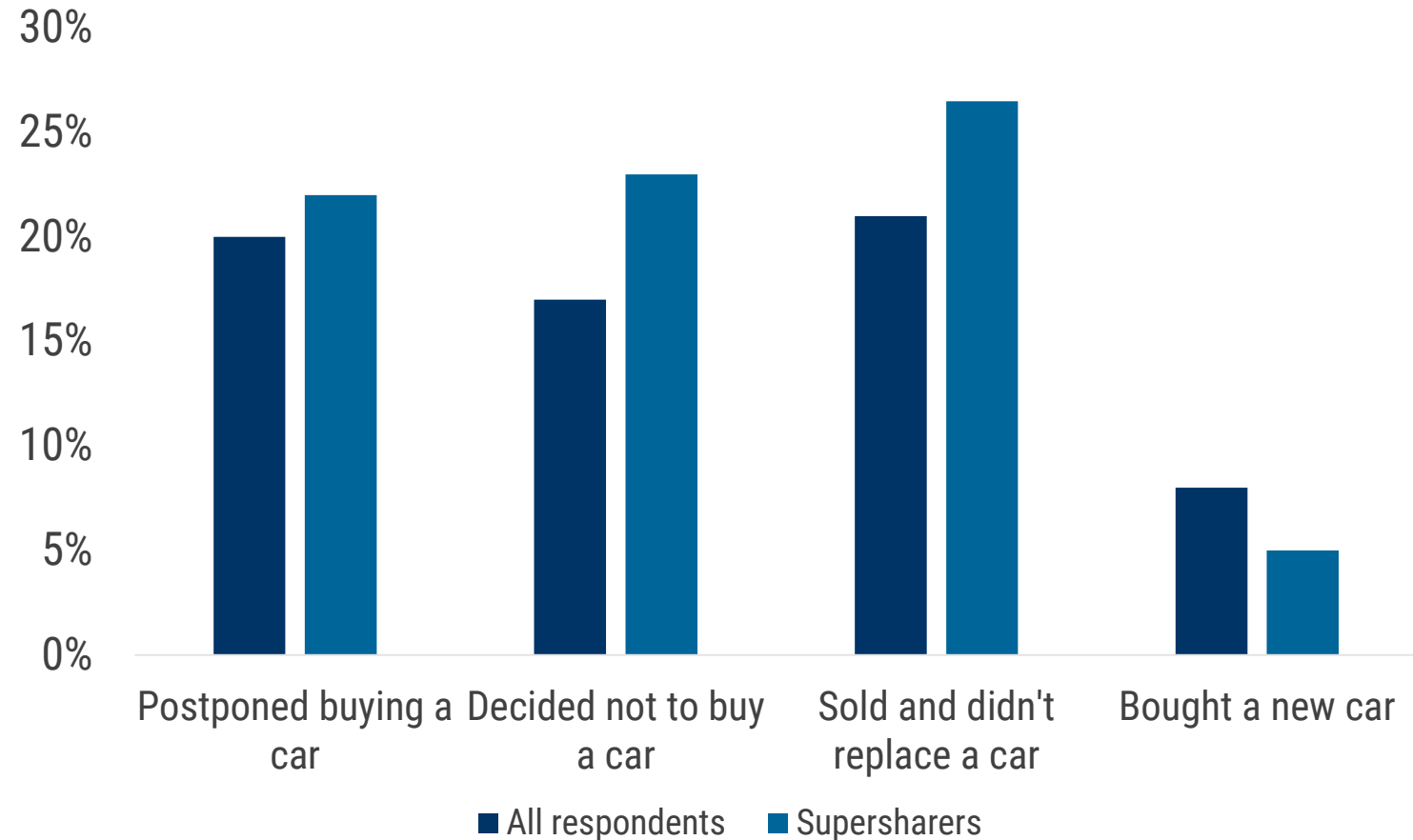
- Postpone buying a car
- Decide not to buy a car
- Sell their cars more often

Less likely to

- Buy a new car

Ride sharers more likely to shy away from ownership

Survey by the Shared-Use Mobility Center



MOVING FROM OWNERSHIP TO SUBSCRIPTION

“Eventually, the majority of miles traveled in the United States will be on a network like Lyft. You’ll be subscribing to a Lyft transportation plan **similar to how you have a music program, maybe Spotify, or a minutes plan like you have on AT&T or Verizon.”**

- LYFT CEO, LOGAN GREEN


BECOMING THE NETFLIX OF RIDE HAILING

Lyft tests out subscription plans to drive loyalty

Lyft is testing out a subscription service in over two dozen cities, in an effort to lock in customers to its service.

Riders can either opt for the “All-Access Plan” for \$299 per month and get 30 rides of up to \$15 or they can subscribe to the “Commuter Plan” and pay \$3.99 month in exchange for 45 Lyft rides between work and home, set at one personalized price.

Early tests have shown that users will opt to take Lyft rather than other ride hailing services and **will forgo public transport or walking.**



The graphic features a stylized city street scene with buildings and cars in shades of purple and pink. A dark purple banner at the top reads "BETA INVITATION". Below the graphic, the text reads: "You're in: Get an All-Access Plan", "We're creating a new subscription plan to lock in free rides and you've been selected to test it first.", "With an All-Access Plan, you pay \$250 each month and your standard Lyft rides are free (up to \$15).", "No hidden fees, no surprises.", and a pink "Subscribe" button.

BETA INVITATION

You're in: Get an All-Access Plan

We're creating a new subscription plan to lock in free rides and you've been selected to test it first.

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[Subscribe](#)

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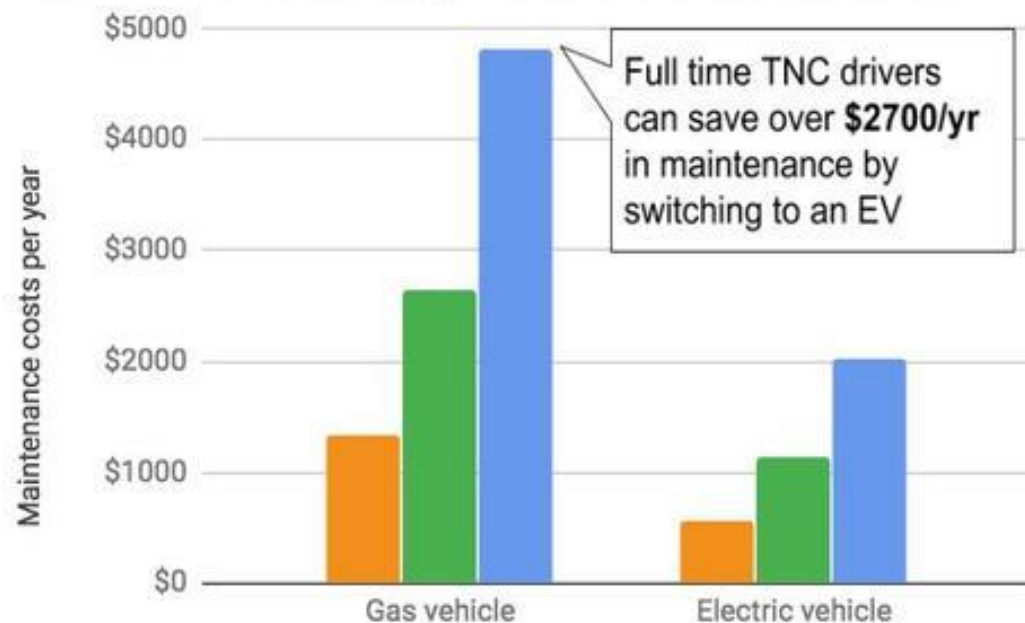
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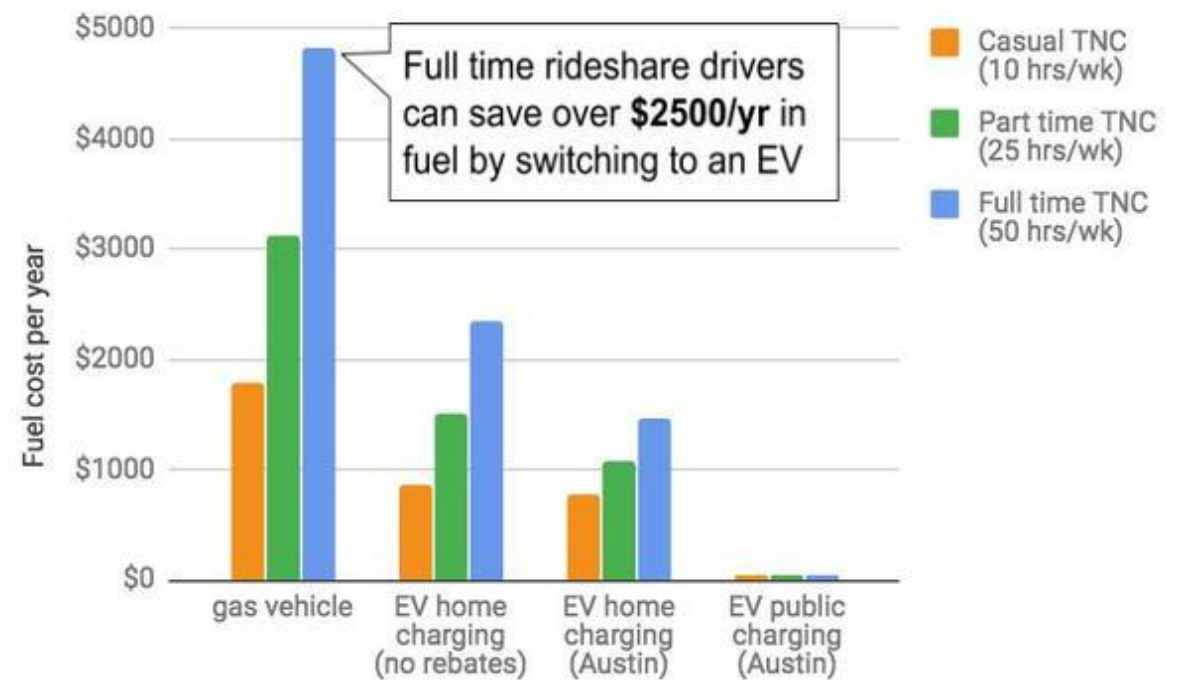
Electric ride sharing services: a virtuous cycle

As ride sharing companies integrate more electric vehicles into their fleets, they'll face lower costs from fuel and maintenance, allowing them to lower their fees and make ride sharing more affordable.

Maintenance Savings with Electric Vehicles



Fuel Savings with Electric Vehicles



Autonomous ride hailing will drive down costs

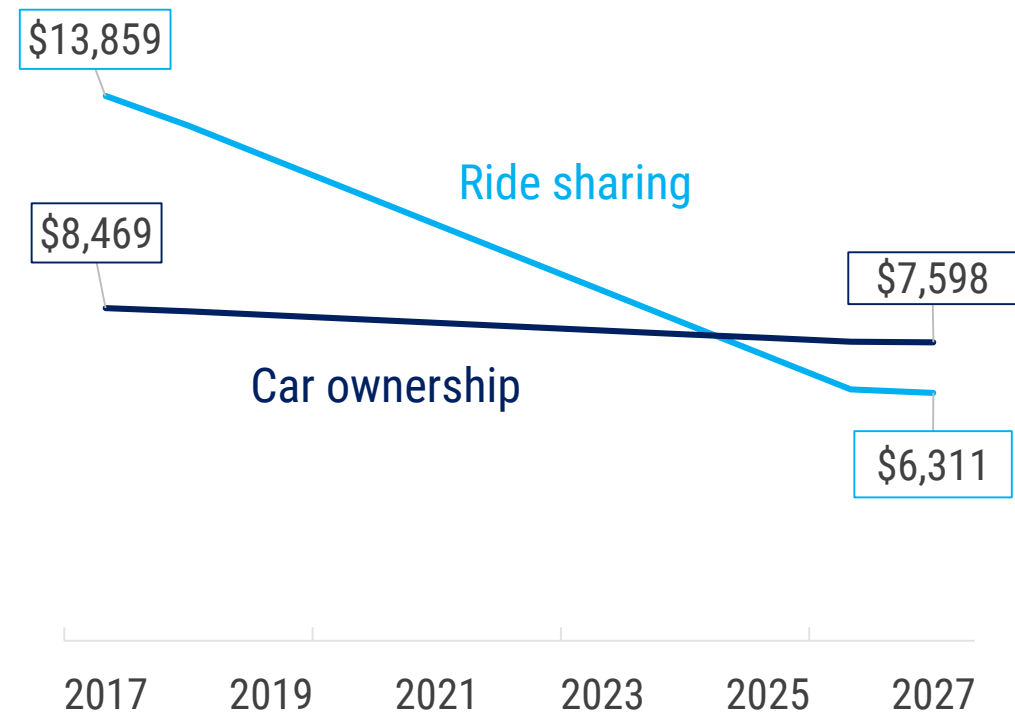
Autonomous technology will allow ride hailing operators such as Uber and Lyft to **cut out the cost of the driver** and lower fares.

Forecasts suggest that **within the next 10 years, ride sharing will be more cost effective than owning a car.**

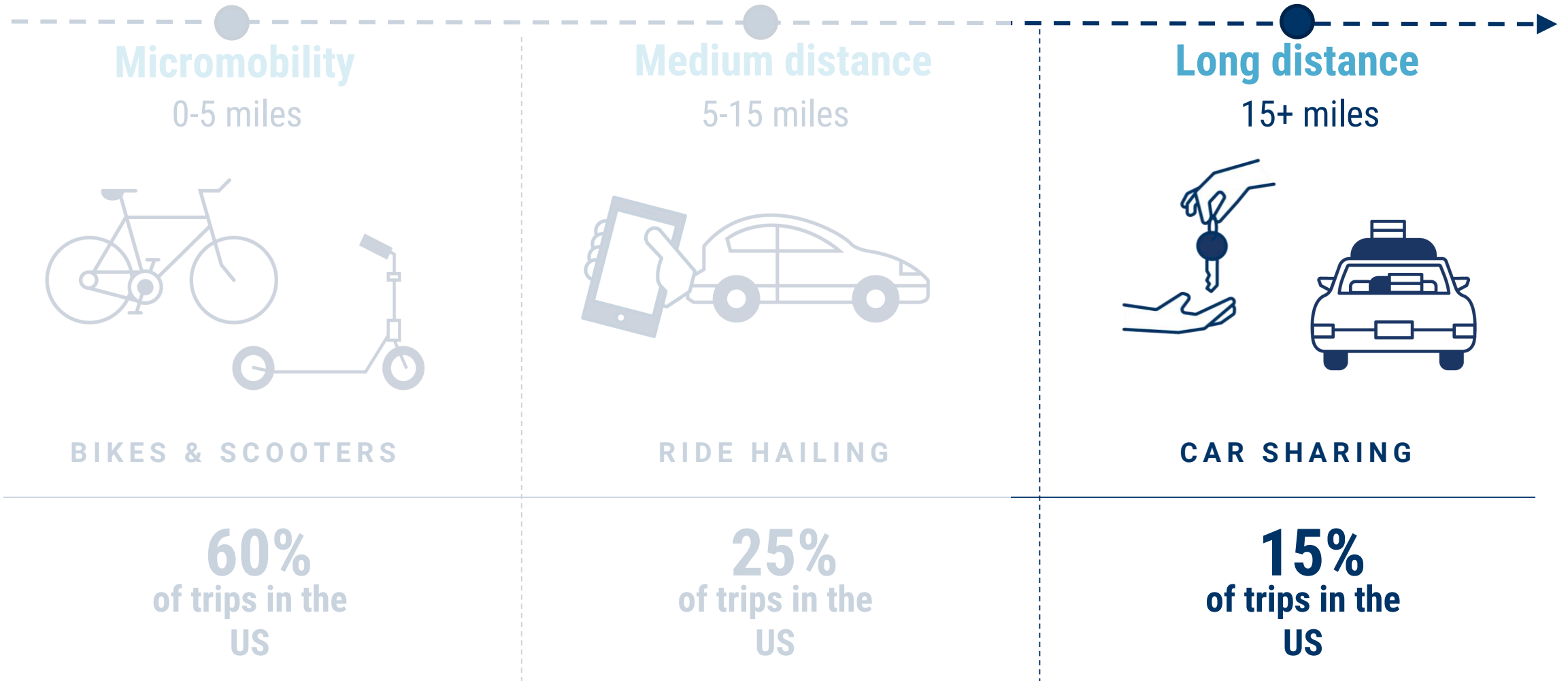


As ride sharing becomes autonomous, costs will fall

Estimated annual cost of ride sharing services (Seattle & Denver) vs. car ownership



Unbundling mobility services by trip length



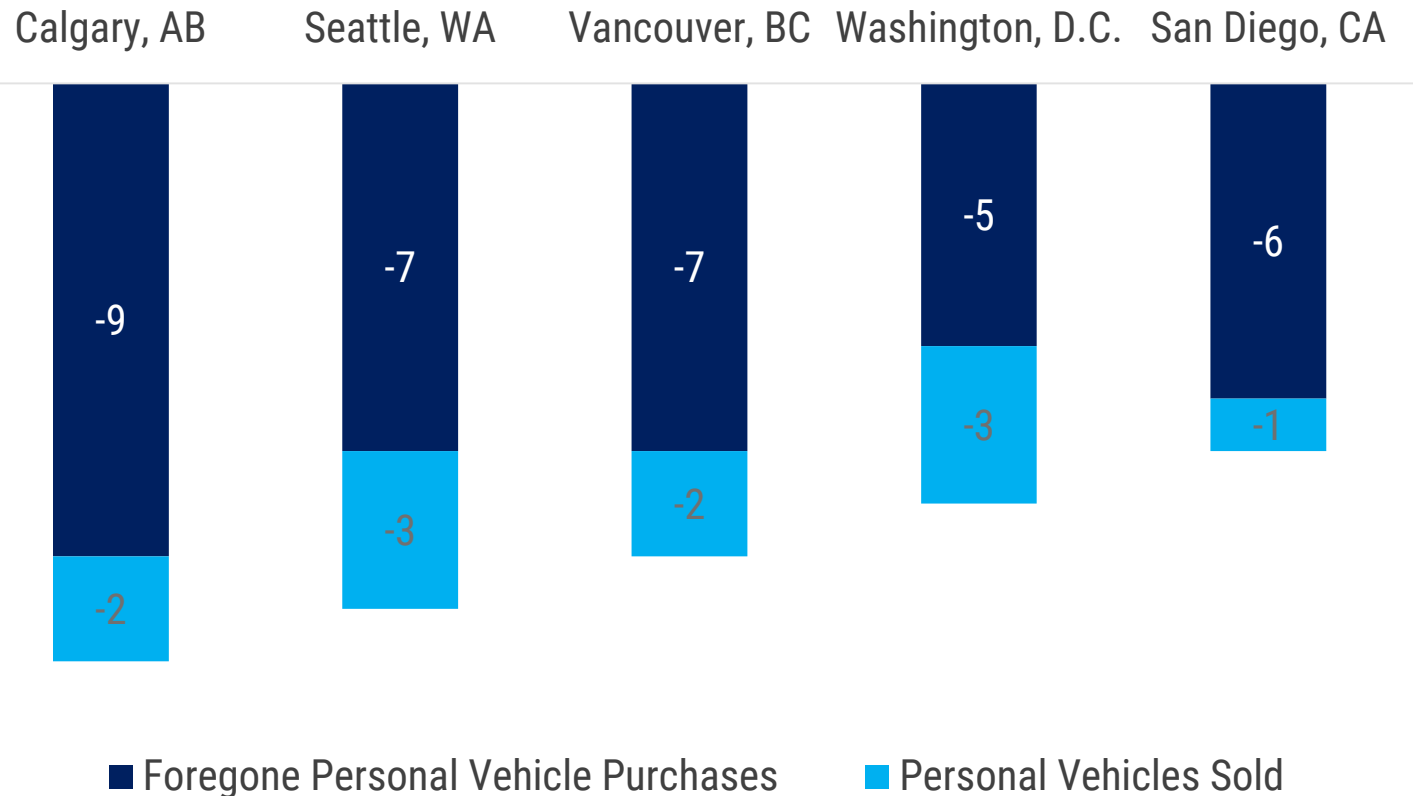
SHARING IS CARING

Flexible car-sharing reduces need to own a car

Daimler's car2go service allows users to rent the car in one location and drop it off in another.

A study by UC Berkeley's Transportation Sustainability Research Center found that car2go service led to a **net reduction** on the number of personally-owned vehicles on the road.

Vehicle Impacts from One-Way Car-sharing



MATCHING OWNERS WITH RENTERS



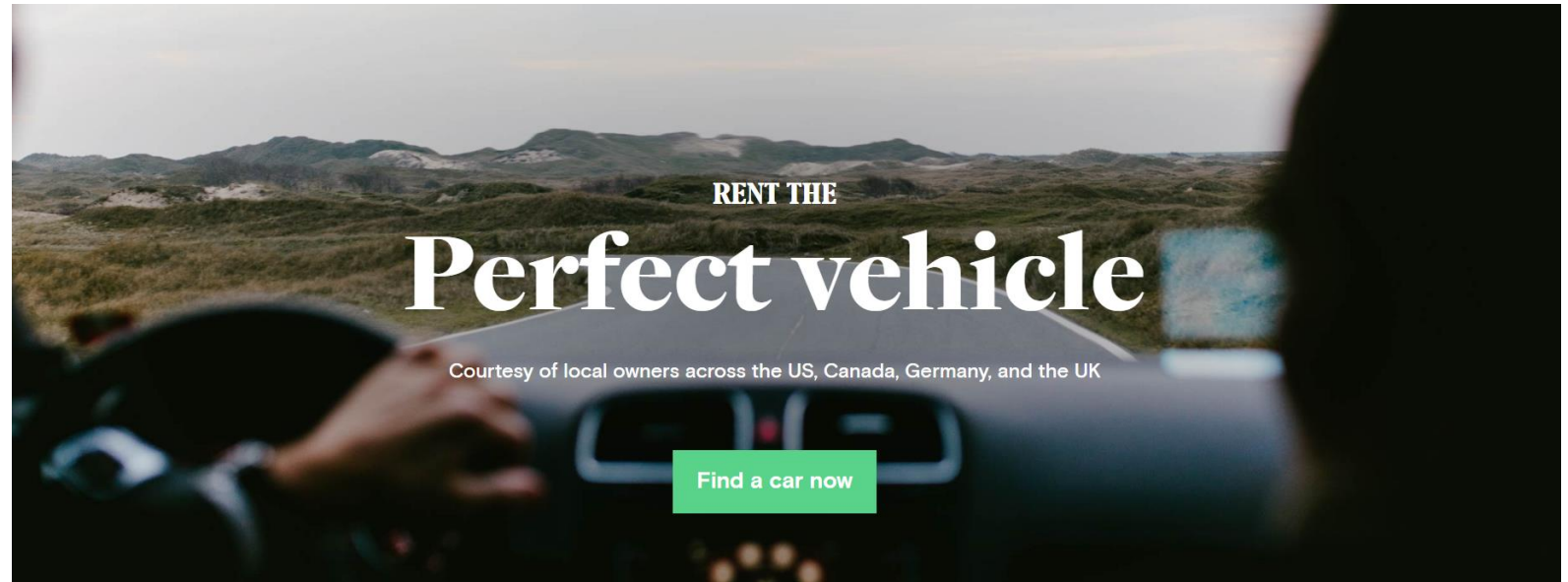
Funding: \$206M

Select investors: Google Ventures, GM Ventures, Sumitomo

Turo is a peer-to-peer car rental marketplace operating in over 2,000 cities globally.

Turo efficiently **connects people who need a car with owners whose vehicles would otherwise go unused.**

It backs each reservation with a \$1 million insurance policy.



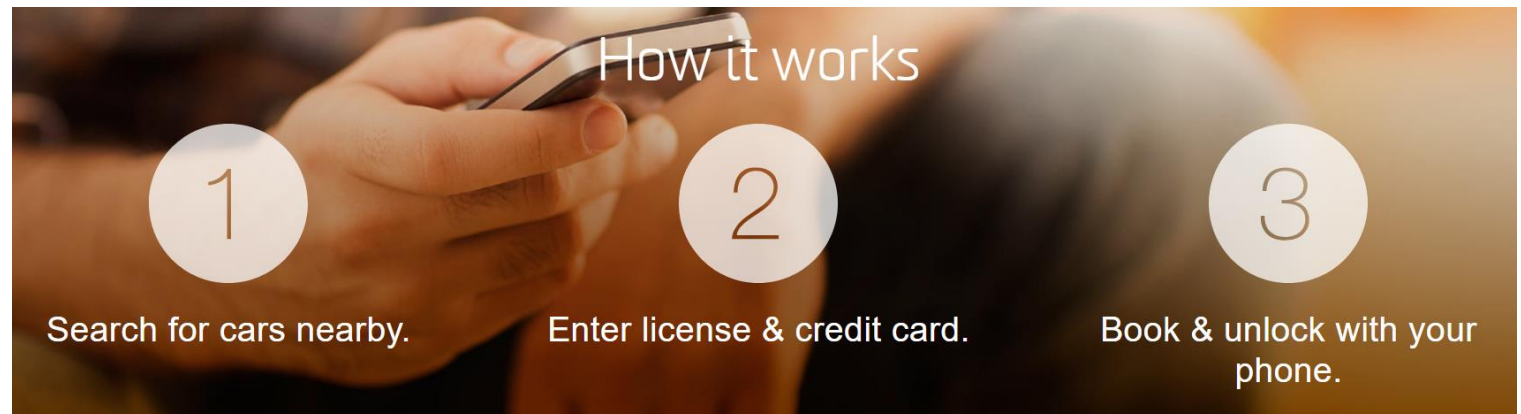
UBER ENTERS THE CAR-SHARING GAME

Getaround and Uber partner for P2P car rentals

Uber is partnering with Getaround, a startup that offers peer-to-peer car sharing, to launch a P2P car rental service.

Local Uber riders will be able to access Getaround's available vehicles and can book and unlock rental cars through the Uber app.

Getaround has received \$98M in funding to-date. Select investors include Toyota, SAIC Capital, and Menlo Ventures.



OEMs see value in car sharing

BMW's DriveNow



BMW's DriveNow operates a car-sharing service using a fleet of vehicles manufactured by the BMW Group. The service is offered in a number of European cities. BMW offers a similar service called ReachNow in the US.

Daimler's Car2Go



Car2Go is a Daimler subsidiary, offering flexible car sharing in Europe, North America, and China. Users can use a smartphone app to locate available cars, allowing them to drop them off in any parking spot.

GM's Maven

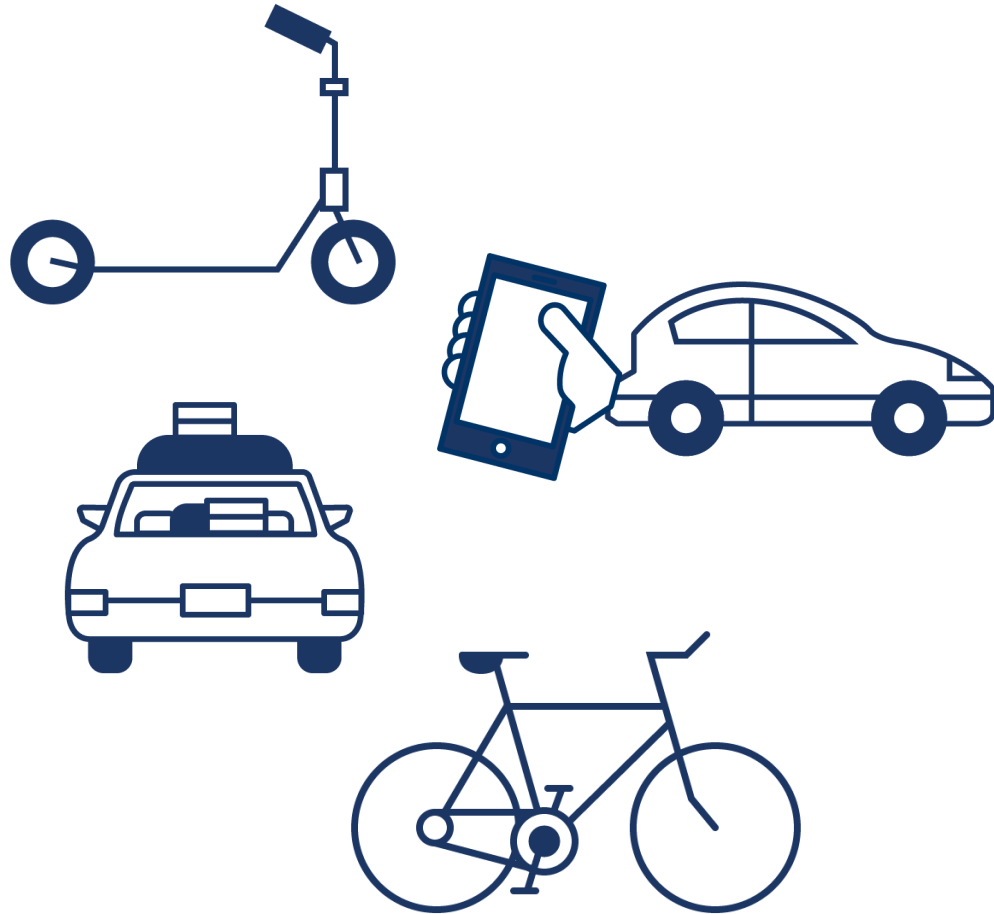


GM's Maven offers a membership for users to reserve cars by the hour, the day, and the month for personal use. The company also offers a weekly rental program designed for ride share and delivery drivers.

Volkswagen's WE



VW's WE, an all-electric car-sharing service, will launch in Germany next year and then expand to major cities in Europe, North America and Asia beginning in 2020.



What's next:
Integrated
transportation

TAKING THE LEAP BEYOND RIDE HAILING

“Just like Amazon sells third-party goods, we’re going to offer third-party transportation services.
We want to be the Amazon of transportation.”

- UBER CEO, DARA KHOSROWSHAHI

Uber opens its portfolio to new modes of transport

In June, Uber launched a new company program called “New Modalities,” a new initiative intended to help the company become a “one-stop-shop” for a multitude of mobility services.

Car-sharing

Partnership with
Getaround

April 2018



Bike-sharing

Acquisition of
Jump Bikes

April 2018



Public transport

Partnership with
Masabi

April 2018



Scoters

Partnership with
Lime

July 2018



Lyft follows suit with bike-sharing platform Motivate

Last week, Lyft entered the bike-sharing space with its **acquisition of the core operations of Motivate**, the **largest bike-sharing operator in North America**.

Motivate owns New York City's CitiBike among other bike-sharing programs in the US.

Lyft is renaming the core business as Lyft Bikes and will control Motivate's contracts with New York, Chicago, and six other cities.



MaaS GLOBAL

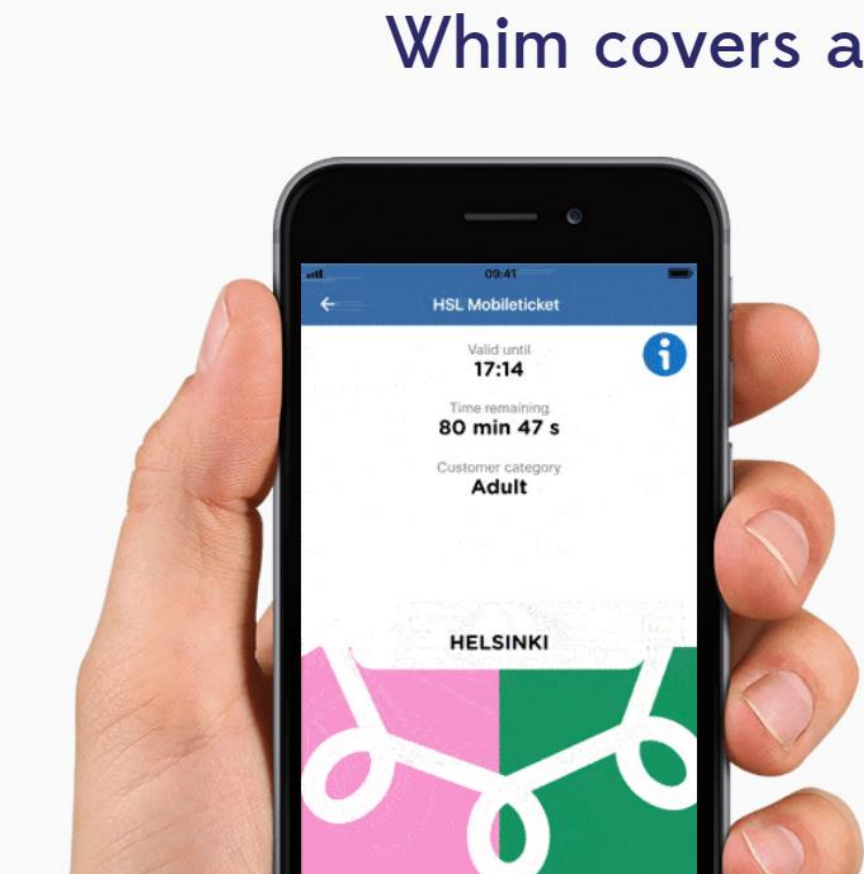
Funding: \$19M

Select investors: DENSO, Toyota

MaaS Global owns Whim, a mobile app that gives users access to mobility packages on a pay-as-you-go or monthly subscription basis.

It offers users access to public and private transport, including buses, trams, trains, bikes, taxis, and hire cars, depending on the package they choose.

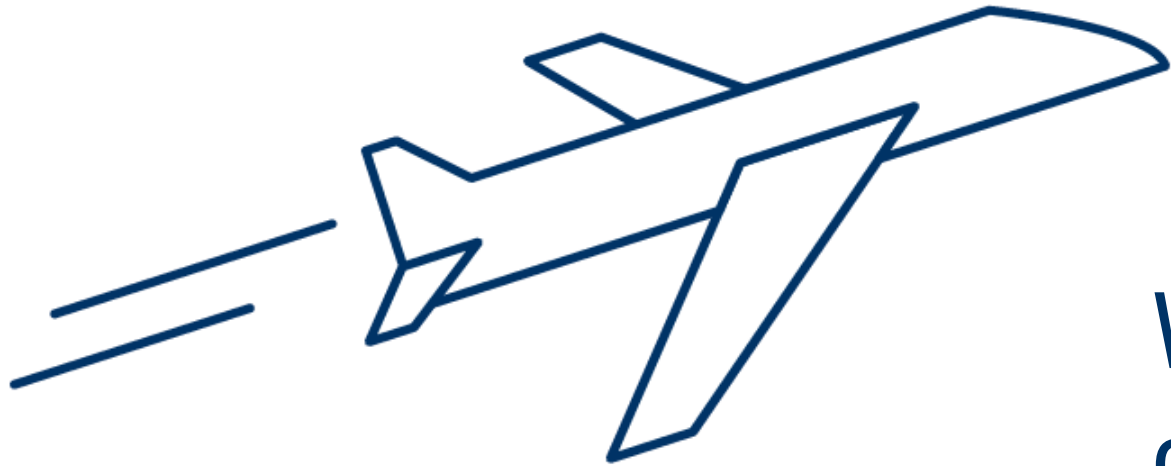
Whim covers all your journeys



How it works

- Public transport
- Taxi
- Car
- City bike

- 1 Choose how you want to travel
- 2 Grab a ticket
- 3 You're ready to go!



What's next: Flying cars

FLYING CARS: THE ARCHETYPAL MOONSHOT TECHNOLOGY

“We wanted flying cars, instead we got
140 characters.”

- PETER THIEL, ENTREPRENEUR AND INVESTOR

Flying cars inch toward commercialization

Boeing bets big on flying taxis and pilotless plane

October 5, 2017 |



Flying Taxis May Be Years Away, but the Groundwork Is Accelerating

February 27, 2018 |

The New York Times

Larry Page's Kitty Hawk unveils autonomous flying taxis

March 13, 2018 |

The Guardian

Flying Cars Closer to Hitting the Skies

June 11, 2018 |

Bloomberg

How Uber Plans To Get Flying Taxis Off The Ground

May 2, 2018 |

FAST COMPANY

Signs of traction as Boeing & Airbus get aggressive

Both firms have launched **venture arms dedicated to the flying taxi**, HorizonX at Boeing and A³ at Airbus.

Boeing also acquired **Aurora Flight Sciences**, an autonomous aviation company, that has since partnered with Uber for flying taxi development.

Aurora's eVTOL



Airbus's Vahana

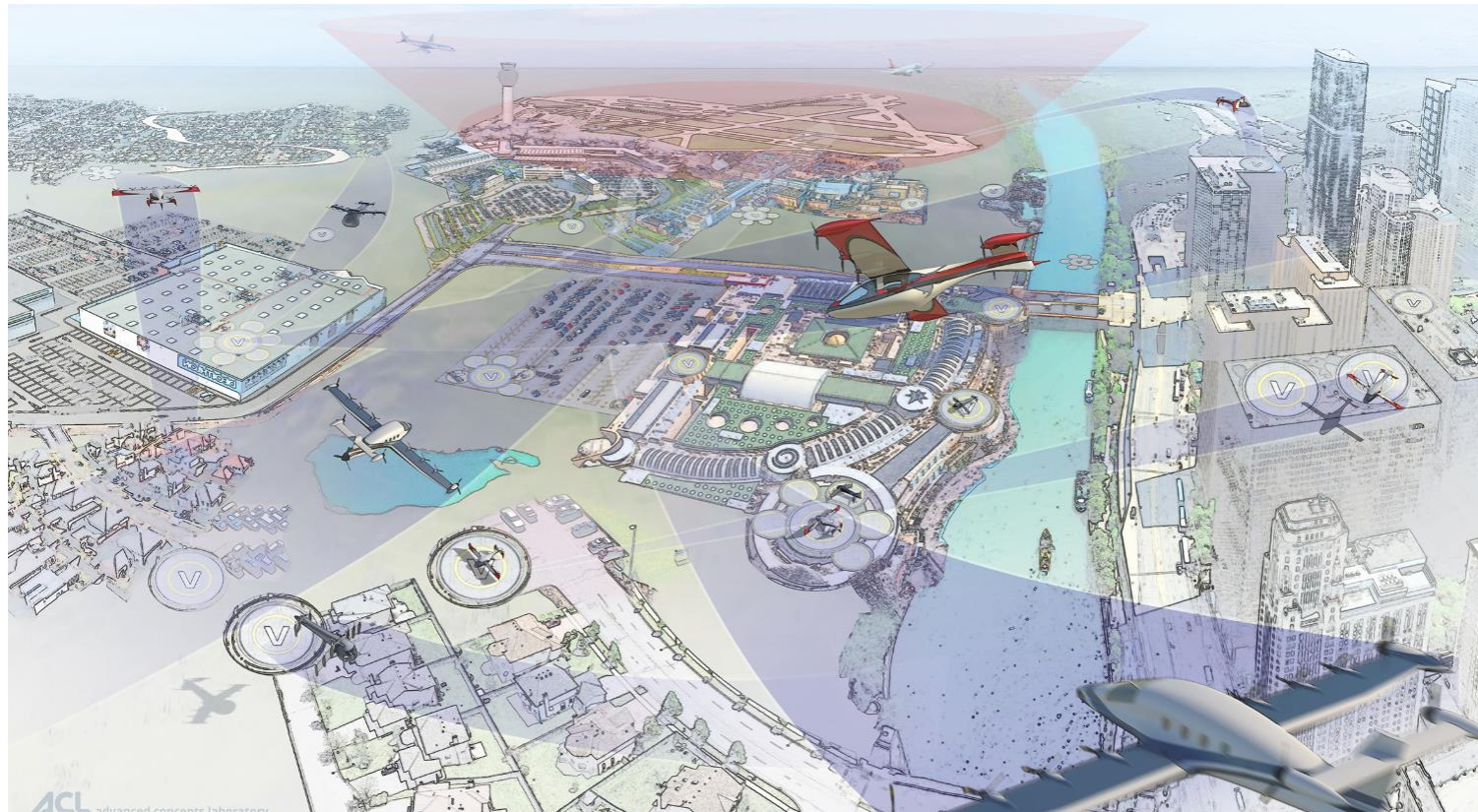


“I think flying cars will happen faster than any of us understand.”

- BOEING CEO DENNIS MUILENBURG

NASA also sees future for flying cars

NASA defined a new research area called Urban Air Mobility (UAM) dedicated to managing air traffic and making it safe for vehicles to efficiently move passengers and cargo in a city.



Uber accelerates flying car initiatives

Uber is planning to **commercially deploy air taxis by 2023**.

The company has established a number of partnerships across an array of functions, most notably in vehicle manufacturing but also in air traffic control (NASA).

In terms of battery technology, Uber is developing its own long-lasting, fast-charging batteries for its electric sky taxis.

Uber's manufacturing partners



THE SKY'S THE LIMIT

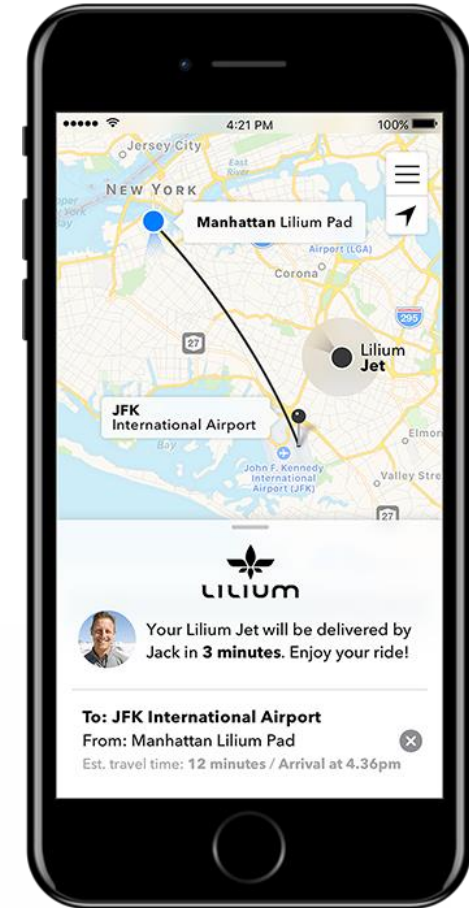


Funding: \$101M

Select investors: Tencent Holdings, Atomico

Lilium is a German aviation startup developing a **five-seater aircraft** to take travelers from Manhattan to JFK airport.

Earlier this year the company flew its two-seater prototype.



Regulation remains a roadblock

Proper regulation and air traffic management are both critical before flying taxis can be commercialized or offered as a service.

Technology – namely AI, sensors, computer vision – capable of navigating the air is still a ways off.

Before flying taxis take off, drones for package delivery will likely be the first step.



OVERTAKING OWNERSHIP

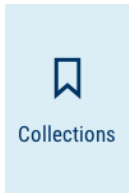
“In the future, **you will be able to move anywhere**, at any time and by any mode of transport **without needing to own a vehicle.**”

- MAAS GLOBAL CEO, SAMPO HIETANEN

DIGGING DEEPER

Augment this briefing with the CBI platform

This briefing contains links to the underlying data, trends, research on the CB Insights machine intelligence platform. These links are described below.



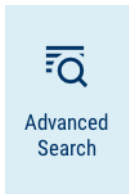
Collections

Market landscapes that highlight emerging players, incumbents, and more in new technology areas



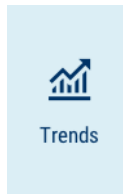
Market Map

Visually compelling industry market landscapes



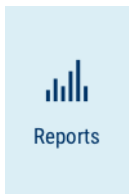
Advanced Search

Drill into the underlying data for a particular point



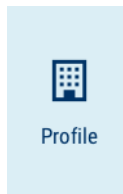
Trends

What's happening, who is being mentioned, company comparisons, and more



Reports

Visualizations providing insight into markets you care about



Profile

Take a deep dive into a specific company, their performance, who invested in who, and more

Questions?

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WHERE IS ALL THIS DATA FROM?

The CB Insights platform has the underlying data included in this report

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