

Press Release
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Nearly 70% of citizens in large Polish cities are familiar with car sharing, yet few of them have actually used it. Bike sharing, taxi apps and ride hailing are in the lead. Plenty of challenges for MaaS companies, but even more room for growth.

- Recognition of individual types of Mobility-as-a-Service (MaaS) among Polish consumers ranges from 28% to 91% – according to the latest „Mobility as a Service PL” report, issued by [Straal](#) in a strategic partnership with the [Digital Poland](#) Foundation. The first comprehensive analysis of the Polish MaaS industry was published on October 18th 2018.
- Nearly 100 pages of unique, research-based insights, data charts and forecasts, both global and local, is [available for free on Straal’s website](#) (Polish language version only). The report is filled with commentaries from Visa, mytaxi, Uber, Taxify, Lime, blinkee.city, and the Digital Poland Foundation.
- Bike sharing and car sharing lead the popularity ranking among Polish consumers – the services are recognized by 91% and 68% of interviewees respectively. Further in the ranking are licenced taxi apps – known to 65% of respondents – and ride hailing apps (like Uber or Taxify), recognised by 61% of interviewees. The niche service of electric scooter sharing was found on the other side of the popularity spectrum, with only 28% of respondents recognising it at the moment. However, scooter sharing is set to gain recognition among Poles rapidly in 2019.
- The actual use of MaaS types differs significantly from its popularity. 61% of Polish MaaS users have already used bike sharing, making it the no. 1 service both in popularity and usage. The variations start with the second and third positions. 47% of Poles use licenced taxi apps, while 35% - ride hailing apps. Despite its recognition, car sharing is only used by 18% of Polish MaaS users and scooter sharing by 5%.

- The average MaaS user is young – often a member of the Millennial generation or Generation Z – and lives in a large urban area (with population above 500.000). As many as 50% of MaaS users were found in the 18-29 age group,. The services are most popular in households with net income above 5000 PLN.
- MaaS expenses in Poland are relatively low. The average monthly MaaS spending is around 60 PLN. The average monthly bike sharing spending is only 29 PLN. In apps dedicated to ordering licenced taxis, Poles spend an average of 69 PLN. Similarly in the ride hailing apps – 67 PLN. Car sharing expenses top the list with a monthly average of 142 PLN. The electric scooter users, on the other hand, typically spend around 55 PLN per month.
- The research identified 3 main categories of MaaS offerings in Poland: well-established, emerging, and niche. The first group includes, among others, bike sharing, ride hailing and licenced taxi apps. Car sharing was recognised as an example of an emerging service, while electric scooters found place among the niche offerings.
- The group of well-established services consists of the MaaS types that have been widely available across the country for a relatively long time, and thus are the most commonly both recognised and used by Polish customers. This segment, however, faces real challenges resulting from the emergence of alternative MaaS types. Bike sharing solutions – usually co-funded by local governments and offer in the closed system – are more and more often forced to compete with electric scooters. The bike sharing tycoon on the Polish market, Nextbike, will find it difficult to expand into smaller cities, given the limitations of the docking station-based system, however, its station-less competitors present little threat to Nextbike’s monopoly without the generously funded governmental support. Licenced taxi apps and ride hailing apps, apart from running against each other, compete with car sharing and scooters. The battle for MaaS users is concentrated in the largest Polish cities. Consequently, MaaS providers try to reach virtually identical audiences. The expansion of ride hailing systems into smaller cities will also prove to be tricky, due to low driver availability and private car maintenance costs being much lower than in large

cities. In the case of taxi apps, small urban areas have been dominated by the local Polish operator – iTaxi.

- Car sharing was identified as an emerging MaaS type. Although nearly 70% of the interviewees are familiar with the service, only 18% of MaaS users admitted they have used car sharing so far. Convincing Poles to start using the systems will pose a major challenge to providers across the country. Since one of the most frequently listed reasons why Polish consumers are hesitant to use shared cars are unclear terms of service, leading companies such as Traficar, Panek, or 4mobility will be forced to increase transparency and invest in customer education. The users need to be aware of the scope of insurance coverage, the implications of abusing the terms of service, and have to be given clear guidelines regarding emergency situations. Another educational challenge is associated with pricing, since consumers frequently list high costs as one of the top downsides of MaaS. Contrary to that believe, car sharing can often prove more affordable than car ownership, especially in large cities.
- The group of niche MaaS types consists of services that have only recently started to pop up on the Polish market, such as electric motorcycles (scooters) or motorized kick scooters. While the former have been available in Poland for almost 3 years, the latter are being launched right now. Among the interviewees, only 5% have used scooter sharing so far, however, this group of respondents stands out as highly loyal to the providers and regular users. The segment of niche MaaS types is forced to compete with other forms requiring user's engagement, such as car sharing or bike sharing. From a technical standpoint, the service is no different to car sharing – with the vehicle type being the only distinction – hence, scooter sharing providers should primarily focus on targeting the customers already using car sharing services.

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