



PERSONAL HOME SERVICES AND PLATFORMIZATION

Towards a new path to growth

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OGUST PRESENTATION



OGUST in numbers

1.000.000 + | Hours worked monthly by our existing clients

160.000 + | managed in our solutions

700 + | companies using our solutions every month

50 + | Available services

15 | Technical partners

International | France & Canada - customers in 8 countries



OGUST

The Personal Services Digital leader since 2006



Best Personal Services solution in 2016 in France
 European Trophy Runner-up 2016
 Excellence award 2016
 Active in Canada since 2017



A custom-made solution depending on your needs

Ogust Manager

The Cloud based service management solution that can adapt to your needs

Ogust Selfservice

E-commerce shop designed to turn your visitors into customers

Ogust Digital Factory

Digital consulting service to jumpstart your website

Ogust Marketplace

Opening new possibilities to greatness of your services



REVOLUTION IN HABITS



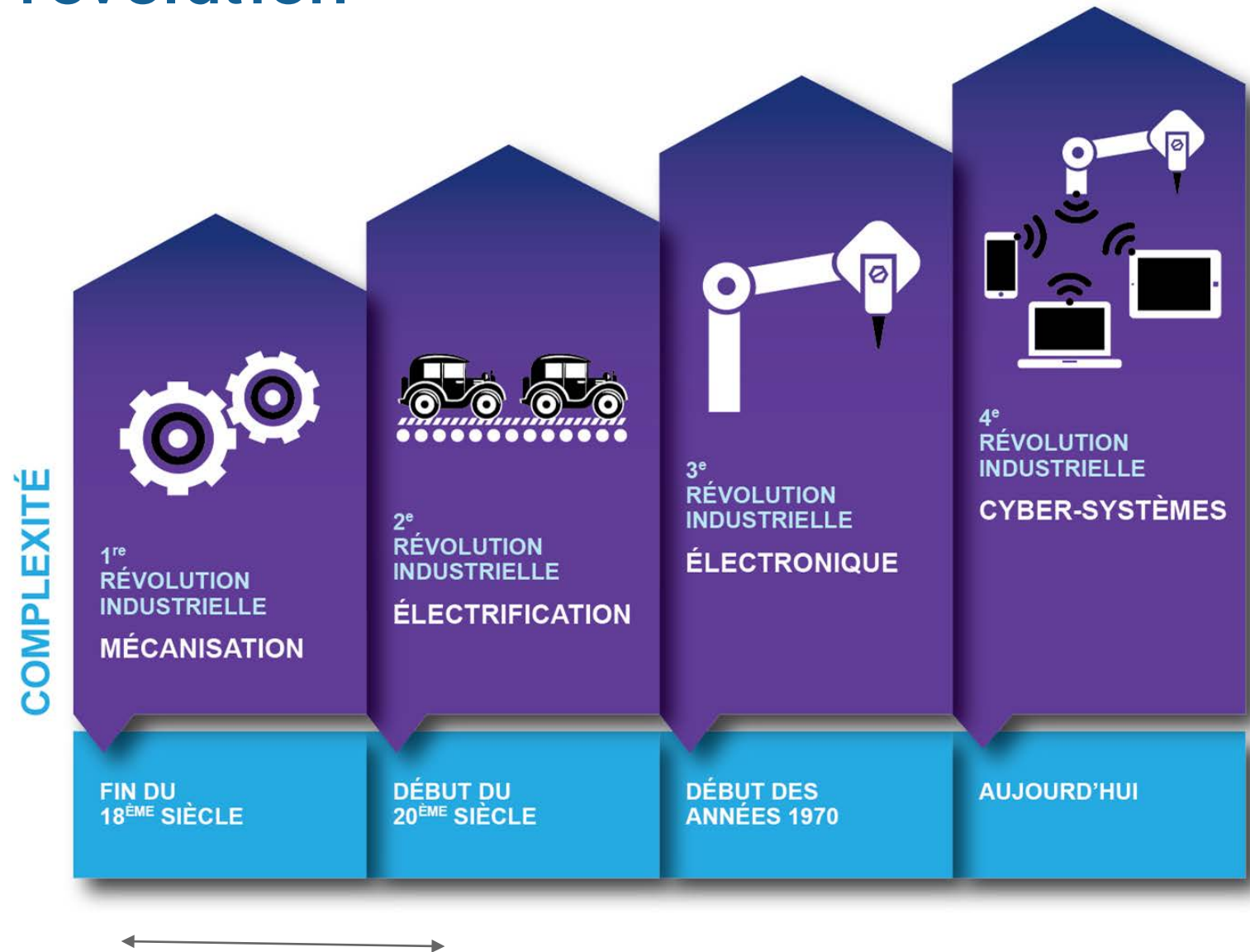
La 4^{ème} industrial revolution

1st industrial revolution
mechanical production
boosted by water and steam

2nd industrial revolution
Mass production based on the
division of labour and
powered nu electrical energy

3rd industrial revolution
Electronics and IT giving a
boost in production
automation

4th industrial revolution
Based on cyber-physical
production systems (virtual
world interacting with the real
world-IOT)



Habits change, needs remain the same

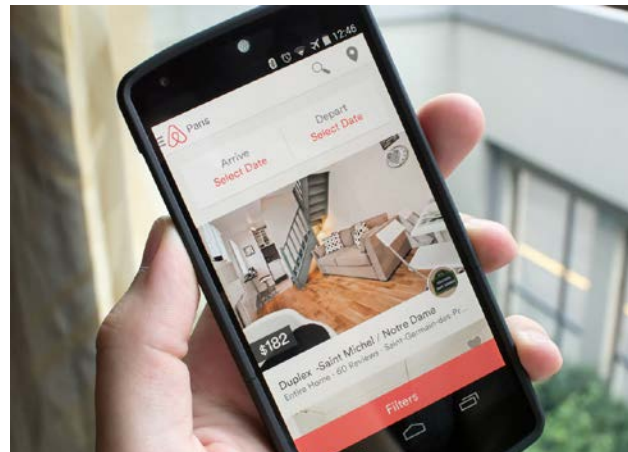


Right here, right now



Ordering online is becoming the new standard when it comes down to shopping

Service Accessibility regardless of the place or time and user's autonomy



Possibility to chose, to compare, service flexibility

Over-connected consumers

BAROMÈTRE DU NUMÉRIQUE

ÉQUIPEMENTS ET USAGES

L'AGENCE DU NUMÉRIQUE

arcep

CONSEIL GÉNÉRAL DE L'ÉCONOMIE DE L'INDUSTRIE, DE L'ÉNERGIE ET DES TECHNOLOGIES

ÉDITION 2017 (chiffres au 30 juin 2017)



UN ACCÈS INDISPENSABLE À INTERNET POUR 9 FRANÇAIS SUR 10

DÉSORMAIS, TOUS INTERNAUTES



L'ACCÈS MOBILE GAGNE ENCORE DU TERRAIN



QUEL TERMINAL EST UTILISÉ LE PLUS SOUVENT POUR SURFER ?

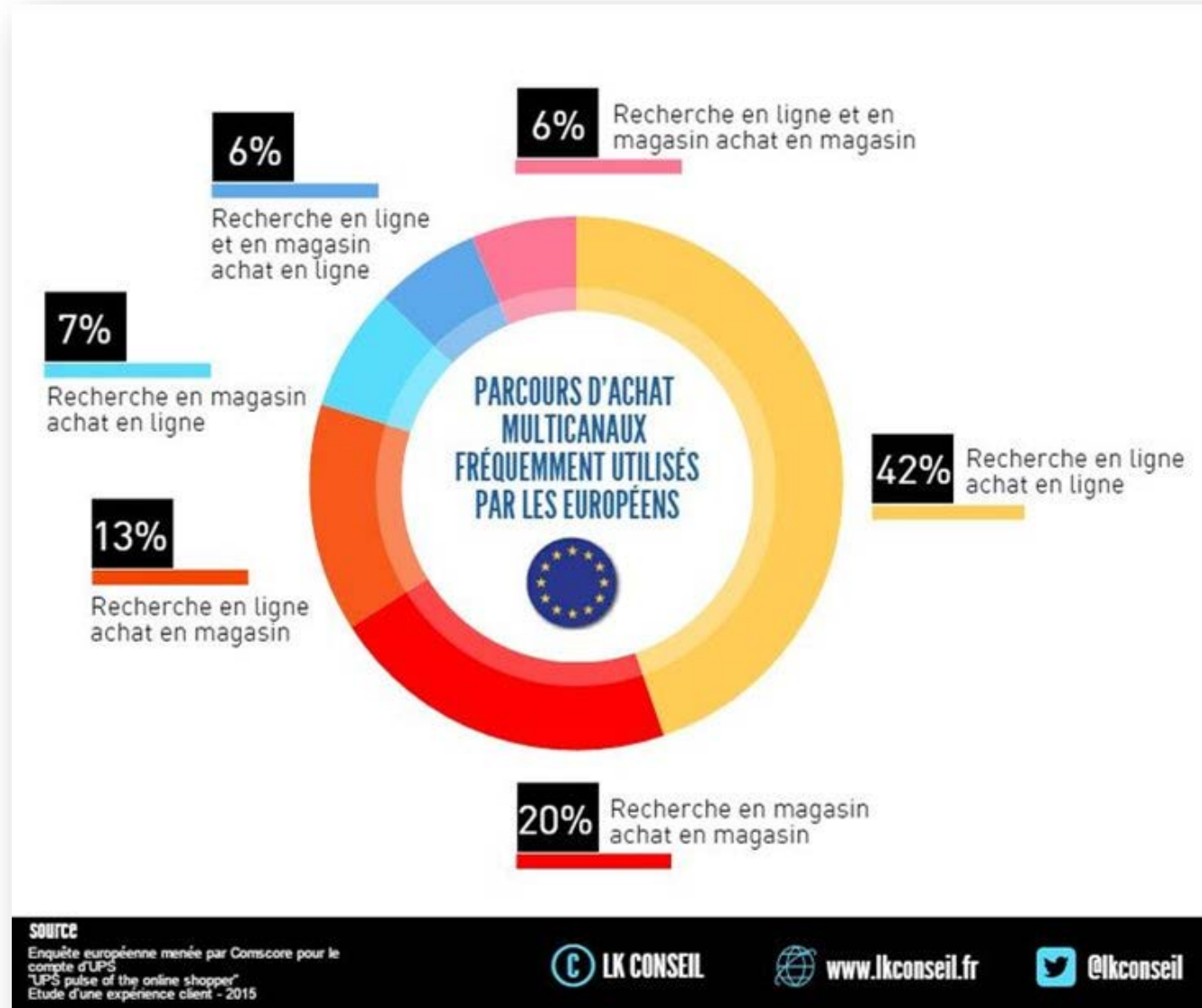


E-COMMERCE ET ÉCONOMIE DU PARTAGE : LE VENT EN POUPE



TOUS LES CHIFFRES DU BAROMÈTRE DU NUMÉRIQUE DEPUIS 2007 SONT À RETROUVER EN OPEN DATA SUR DATA.GOUV.FR.

A multi-channel purchasing journey



Only **20%** of purchases are completed offline

Customer centric approach

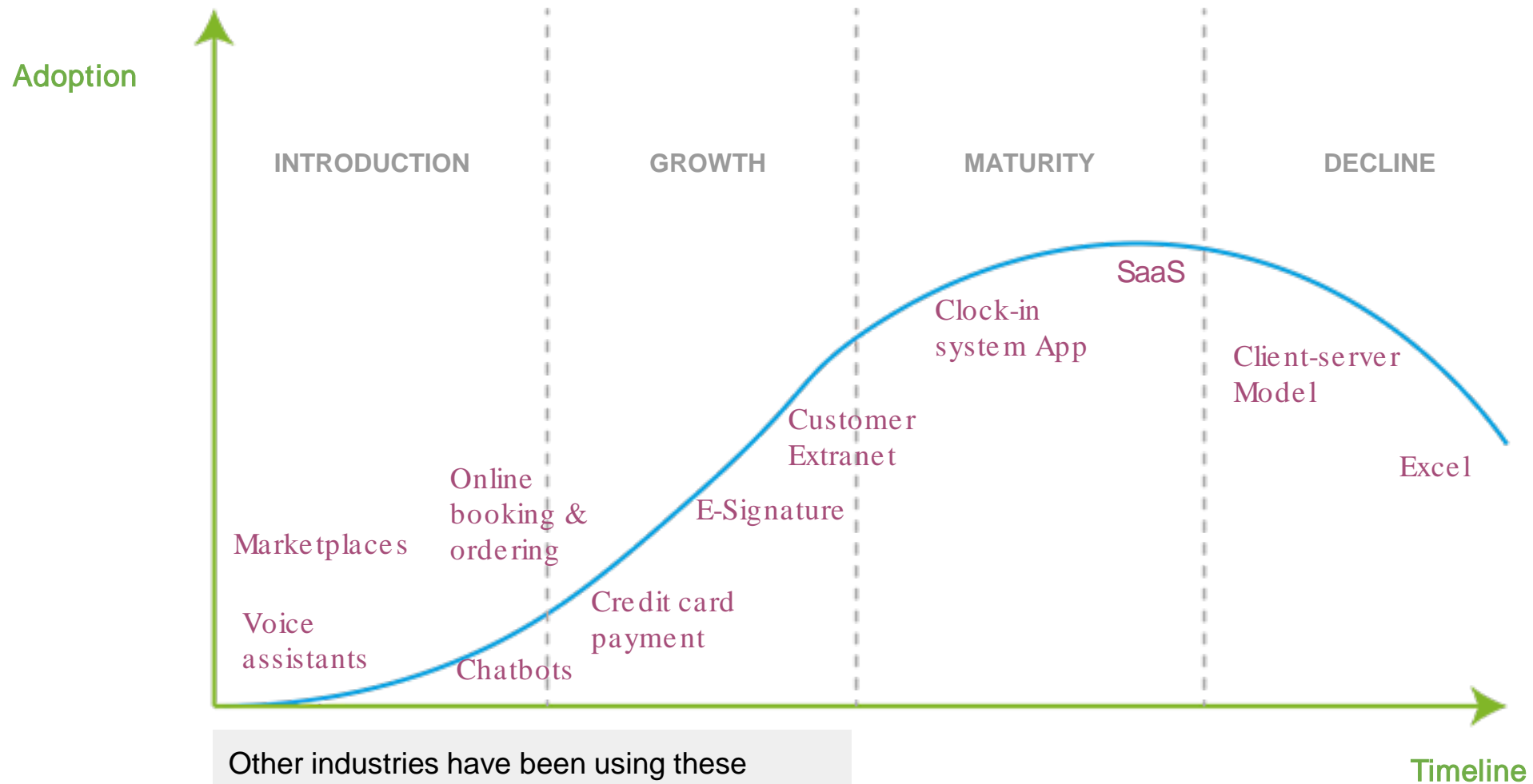
Prioritize efforts getting rid of customers' pain points & offer a optimum purchase experience

It's about knowing how to focus on strong added-value customer segments

60% of companies having a customer centric approach are more profitable than the ones that aren't



Tech offer evolution in the PHS sector



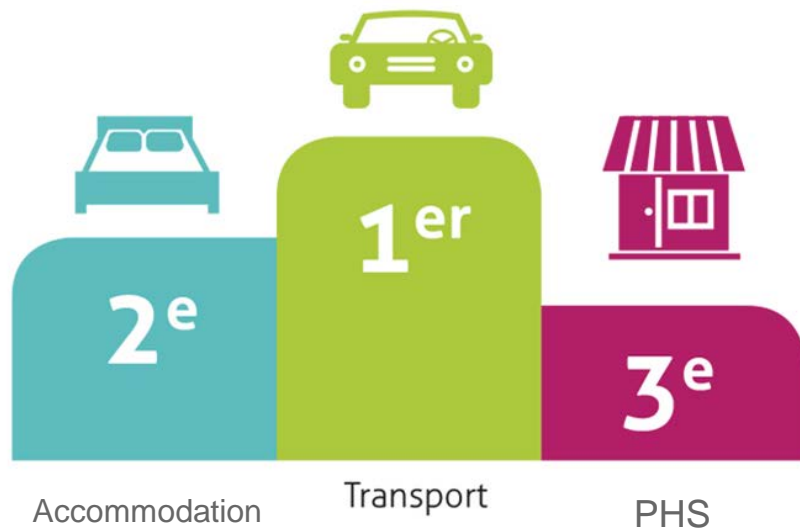
Other industries have been using these functionalities for a long time.

SPREAD OF THE SERVICE RELATED PLATFORMS



The strongest concentration of platform growth

Top 3 des secteurs touchés par la plateformes en Europe. (source : PwC)



Accommodation

Transport

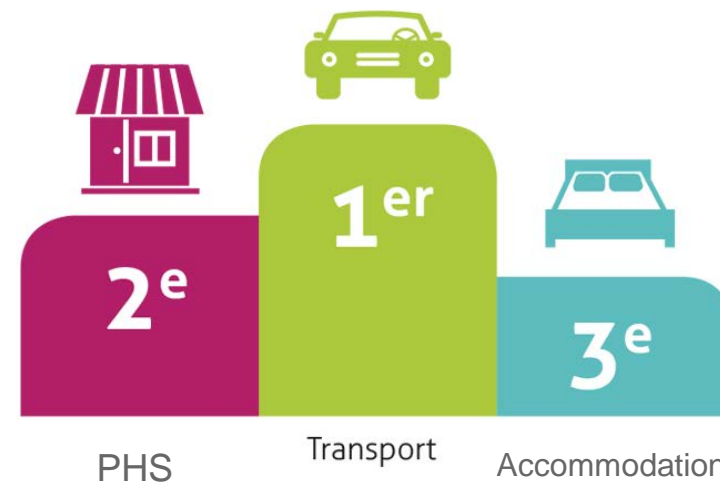
PHS

2015



50%

de croissance
d'ici à 2025



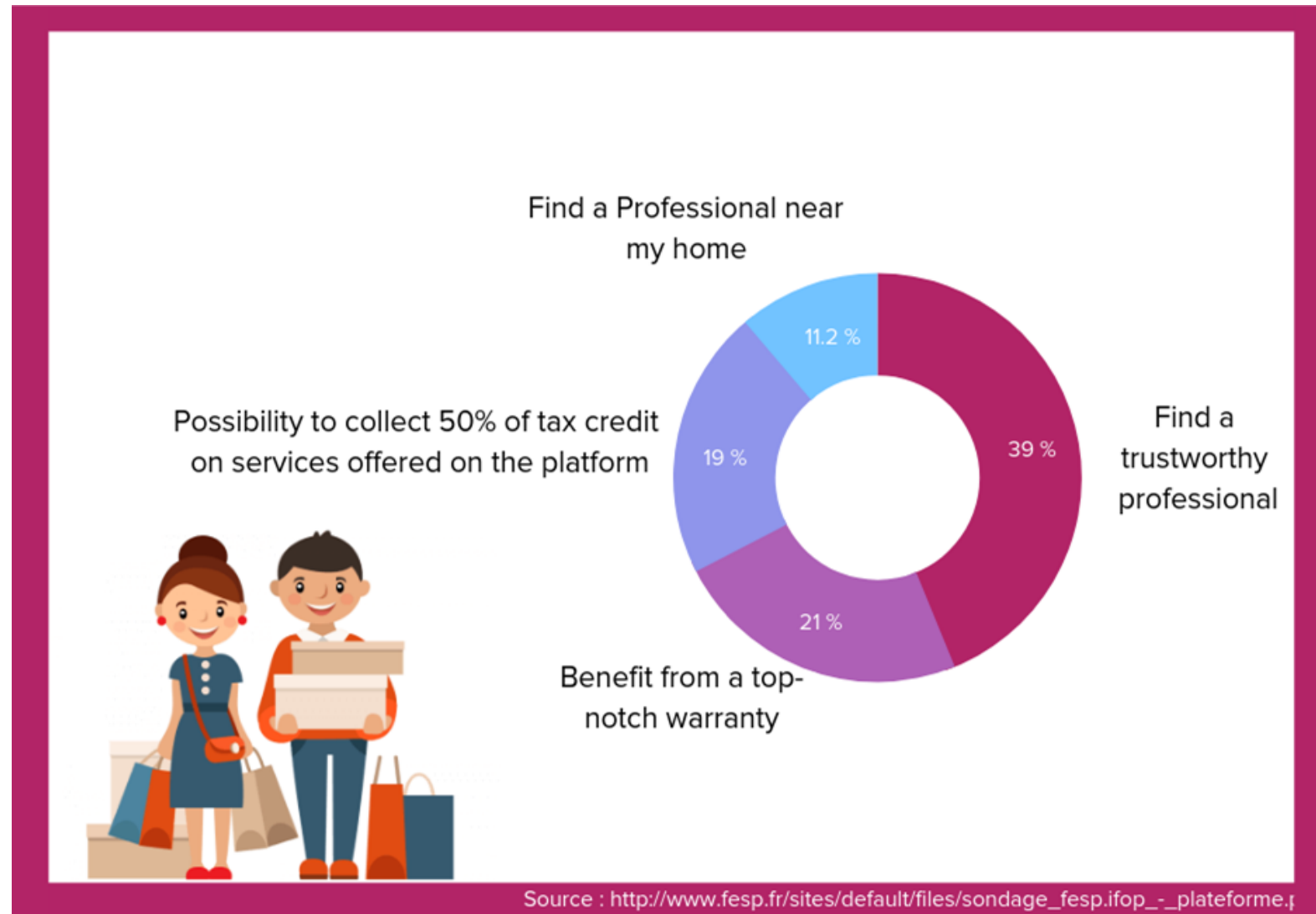
PHS

Transport

Accommodation

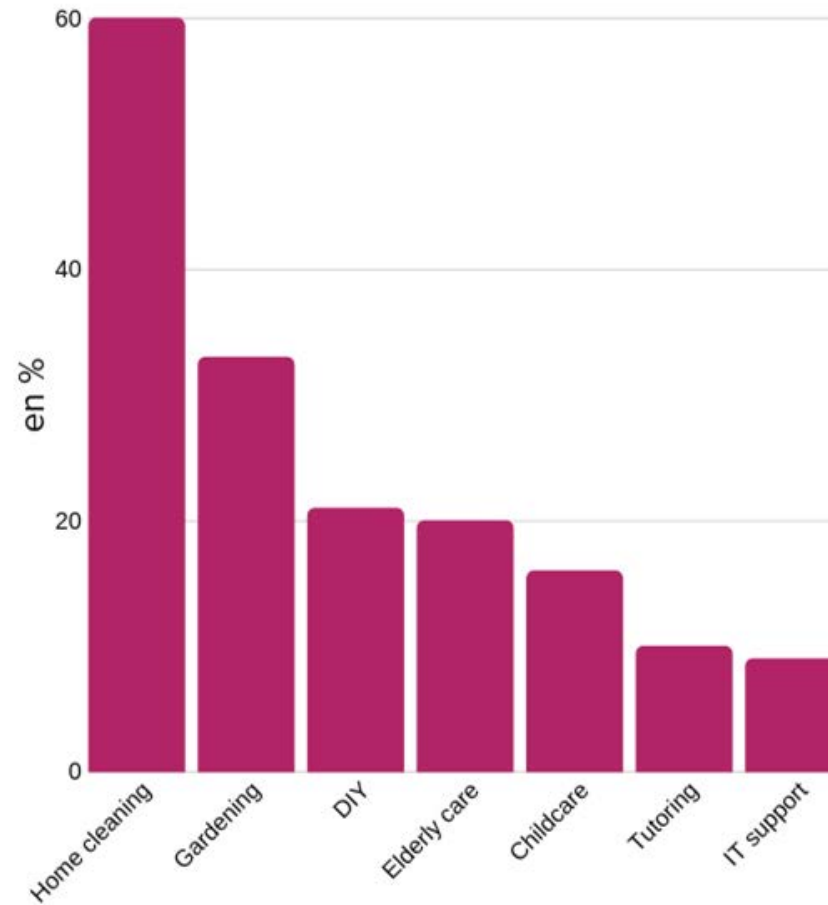
2025

Consumers Expectations regarding platforms



Services that consumers would love to find

51%
of people are keen on using a
platform to order services
such as :

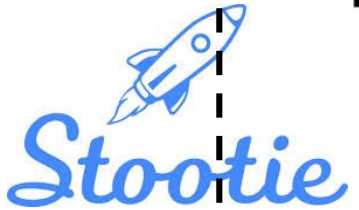
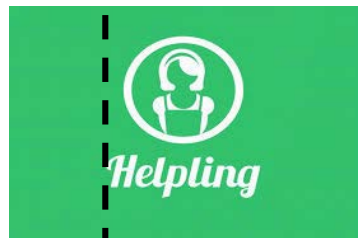


CURRENT PLAYERS

FRANCE



EUROPE



USA



This digital reality affects every sector of the economy

NEW PLAYERS IN THE DIGITAL ECONOMY



Design by Creads, 1^{er} plateforme de design participatif de France.

Business models and value propositions are reinvented

- Sense of service
- Same job, same customer, new business model
- La maximisation de l'expérience utilisateur
- Customer experience maximization
- Simple & intuitive mobile app
- An immediate service/response

To meet a customer's need the simplest way possible

SPRING SAVINGS \$20 OFF deep cleaning & more* Shop now Restrictions apply

House Cleaning

★★★★★ 11227 customer reviews

Share [Email] [Facebook] [Twitter] [Pinterest] 90+ Shares

What size is your home? Help ▾

2 Bedrooms

1 Bathroom

What type of cleaning products do you prefer? Help ▾

Standard

Recommended worker-hours of cleaning Help ▾

3 hours

What's included in a cleaning?

amazon home services

Estimate: **\$92.47** -
3 hours @ \$30.82/hour

Deliver to France

Book an Appointment

Handpicked Pros Upfront Prices Happiness Guarantee

SPRING SAVINGS \$20 OFF deep cleaning & more* Shop now Restrictions apply

Lawn, Garden, or Yard Maintenance

★★★★★ 460 customer reviews

Share [Email] [Facebook] [Twitter] [Pinterest]

How many hours of yard maintenance do you need? Help ▾

2 hours 4 hours 8 hours

amazon home services

Estimate: **\$185.00** -
by TechTron1x
75% positive ratings (4 reviews)

Deliver to France

Book an Appointment

Handpicked Pros Upfront Prices Happiness Guarantee

SPRING SAVINGS \$20 OFF deep cleaning & more* Shop now Restrictions apply

Window Cleaning

★★★★★ 415 customer reviews

Share [Email] [Facebook] [Twitter] [Pinterest]

How many windows do you need cleaned? Help ▾

1-10 11-20 21-30 31-40 41-50

What needs to be cleaned?

Exterior Panes Only Exterior + Interior Panes

Both Sides + Screens + Sills/Tracks/Frames

How many stories of windows do you need cleaned? Help ▾

1 Story 2 Stories

amazon home services

Estimate: **\$221.99** -

Deliver to France

Book an Appointment

Handpicked Pros Upfront Prices Happiness Guarantee

WHAT'S UP WITH THE INDUSTRY'S FINEST?



Services hardly digitized

- The majority of service companies does not have a proper website, does master the codes and what's at stake on the internet
- Hardly any service companies not even the biggest ones offer the possibility to order services online
- Most of management solutions are not interfaced with third party solutions (e-commerce)
- Current platforms do not integrate & cannot integrate what the service companies offer

Companies Vs Platforms

62% of companies stated competition from PHSplatforms will go upward

According to you, what are the assets of platforms regarding its customers?

1	La facilité de l'achat en ligne	easy (online)	68%
2	La possibilité de noter les prestations	rating	38%
3	Le prix	price	32%
4	Autre	other	4%



The emergence of Digital PHSplatforms is in your opinion



1	Une saine concurrence	healthy competition	36%
2	Une menace	threat	32%
3	Une opportunité de partenariat	partnership opportunity	32%

Should PHS companies team up with PHS platforms regardless of the commission they have to give?



Should PHS companies unite to come up with solutions that can compete against PHS platforms?



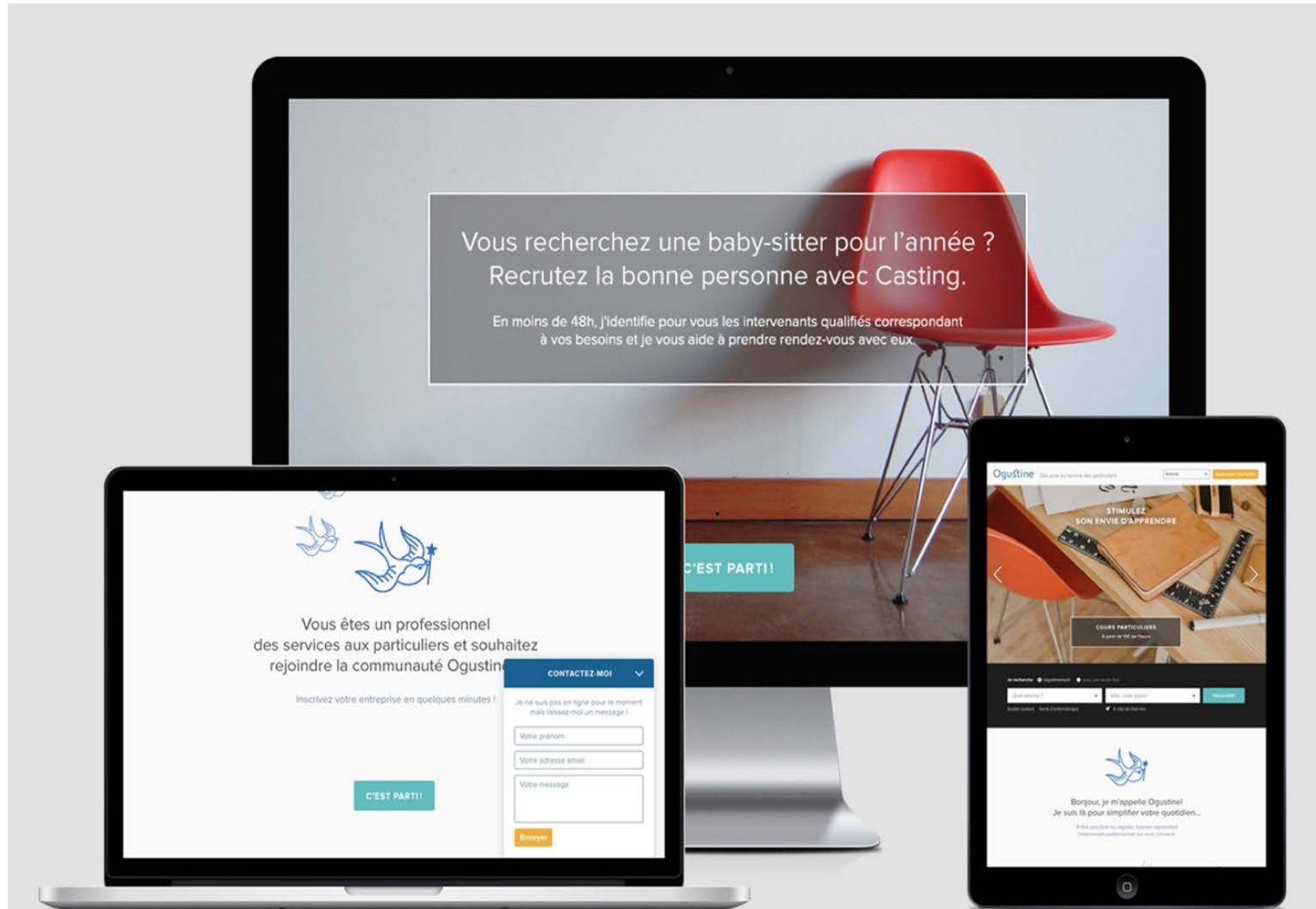
What to expect for personal services companies?

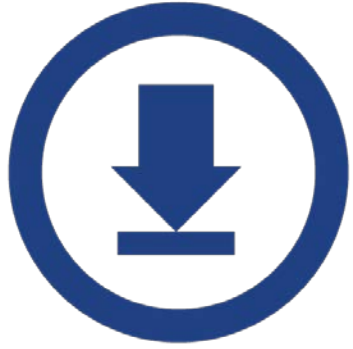
- **Partnership** between traditional businesses (qualified & experienced staff) and platforms (notoriety)
- **Upmarket offer** (digitalization & customer experience) can be accessed by big and **small businesses**
- **Alliances “area-based”** to create their own platforms in the likes of co-operatives in a city or a district

Ogustine



Ogustine.com : 100% industry professional platform





Thanks !

Don't forget to download :

Our white paper:

<https://blog.ogust.com/plat eformisation> (in French)
(in English upon request at contact@ogust.com)

Our e-commerce service guide:

<https://blog.ogust.com/guide-e-commerce> (in French)

