



INTELLIGENT TRANSPORT SYSTEMS

AP Forum 2018

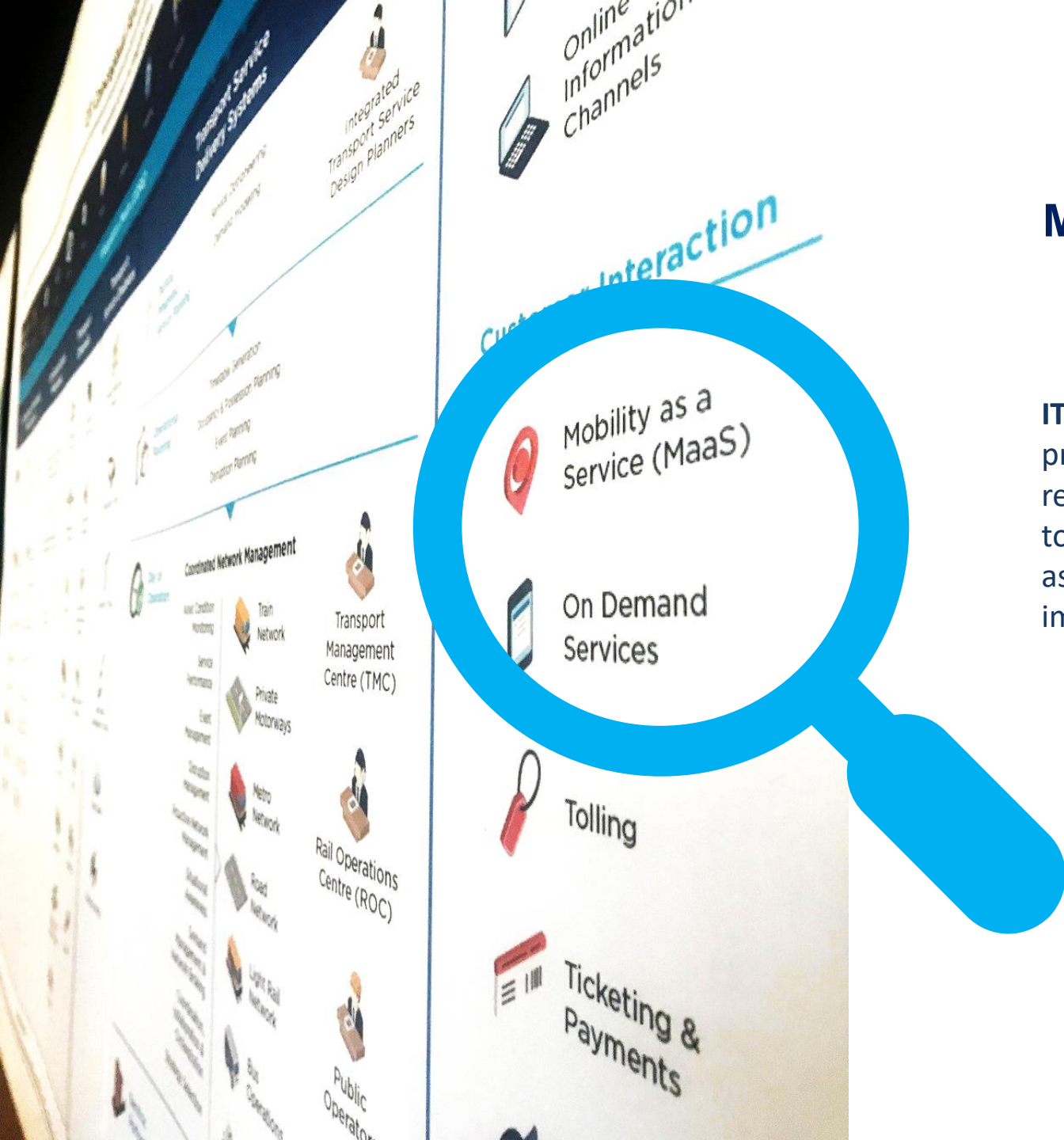




Dean Zabrieszach

President ITS Australia

Chief Executive HMI Technologies



Mobility as a Service: Research and Report

ITS Australia are leading a research project through the **iMOVE CRC** with research partners **Institute 4 Choice**, to better understand what Mobility as a Service means for Australia and, importantly, what Australians think.

PROJECT PARTNERS



STEERING COMMITTEE



NATIONAL & INTERNATIONAL INTERVIEWEES



ARUP



CUBICTM



keolis
NEDERLAND



Maas
GLOBAL



TAXI
SERVICESCOMMISSION



STATE & REGIONAL INTERVIEWEES



Queensland Government



ACT Government



“The vision is to see the whole transport sector as a co-operative, interconnected eco-system, providing services reflecting the needs of customers. The boundaries between different transport modes are blurred or disappear completely.”

Sampo Hietanen
CEO, ITS Finland

Mobility as a Service

Research and Report – Project Goals

Review the current status of MaaS overseas and in Australia

Explore Australian consumer preferences in relation to on-demand transport and MaaS

Support the development of suitable on-demand transport and MaaS for the Australia community



“MaaS systems offer consumers access to multiple transport modes and services, owned and operated by different mobility service providers, through an integrated digital platform for planning, booking and payment.”

Proposed MaaS definition derived from ITS Australia and I4C research project and report

Infrastructure Australia - Drivers of Change

THE AGEING POPULATION	<p>The Australian population aged 65 and over will significantly increase over the next 40 years, as the ratio of working-age people will decrease. This means Australia's governments will face increasing fiscal gaps, which will impact on funding availability for the necessary infrastructure upgrades and additions required to support Australia's growing population.</p>
RAPID TECHNOLOGICAL TRANSFORMATION	<p>Technological change across a range of sectors within the Australian economy is fundamentally disrupting how goods and services are provided, regulated, consumed and paid for. This will have implications for the planning, design and operation of Australian cities both now and in the future, including our transport networks.</p>
THE INCREASING URBAN FREIGHT TASK	<p>According to the 2015 Australian Infrastructure Audit, Australia's containerised freight task is projected to experience substantial growth, increasing by 165% by 2031,9 with cities being a primary location for this growth. This will have implications for our urban freight networks, in particular first and last mile transport and handling, which will impact the future structure of our cities.</p>
THE IMPACTS OF CLIMATE CHANGE	<p>The changing global climate is driving shifts in short-term weather patterns, including increased extreme weather events, and longterm climate trends. At the same time, Australia's cities are a key source of emissions, and are located in areas which are at risk from climate change impacts. Policy and regulatory responses from governments to climate change will therefore have significant implications for the operation of Australian cities, particularly the larger ones.</p>
THE SHIFTING STRUCTURE OF NATIONAL & GLOBAL ECONOMIES	<p>The national economy is in a state of transition. As the mining investment boom winds down, the focus of the economy is shifting towards service and knowledge-intensive activities. Cities are the ideal location for these agglomerating economies, enabling collaboration and easy access to skilled labour. This has implications for the spatial structure of our cities, and the infrastructure which supports them.</p>
CHANGES TO THE NATURE AND LOCATION OF WORK	<p>Technological innovation, including ongoing developments in communications, robotic technology and artificial intelligence, are enabling changes to the way we work. These changes will have implications for the nation's key employment centres, primarily located in our cities, with flow-on impacts for infrastructure networks and social equity across our cities.</p>

Transport for NSW - Architecture Ecosystem



SAMPLE OF MaaS Systems Worldwide

MaaS system	Service region	Modes offered	Planning	Booking	Payment	Governance
UbiGo	Gothenburg, Sweden	Local public transport, car rental, carshare, taxi and bikeshare	Full integration across modes	Full integration across modes	Personalised monthly subscription, with top-ups	Public-led
Whim	Helsinki, Finland; West Midlands, UK	Local public transport, car rental and taxi	Full integration across modes	Full integration across modes	Pay-as-you-go & fixed monthly subscriptions	Private-led
Moovel	Stuttgart & Hamburg, Germany	Local public transport, national rail, carshare, taxi and bikeshare	Full integration across modes	Full integration across modes	Pay-as-you-go	Private-led
WienMobil	Vienna, Austria	Local public transport, carshare, taxi, car park and bikeshare	Full integration across modes	Partial integration across modes	Pay-as-you-go	Public-led
EMMA	Montpellier, France	Local public transport, carshare, car park, on-street parking, bikeshare and bike parking	Full integration across modes	Full integration across modes	Fixed monthly and yearly subscriptions	Public-private partnership
Mobility Shop	Hannover, Germany	Local public transport, national rail, carshare and taxi	Full integration across modes	Partial integration across modes	Pay-as-you-go	Public-private partnership

WHO DID WE SURVEY?

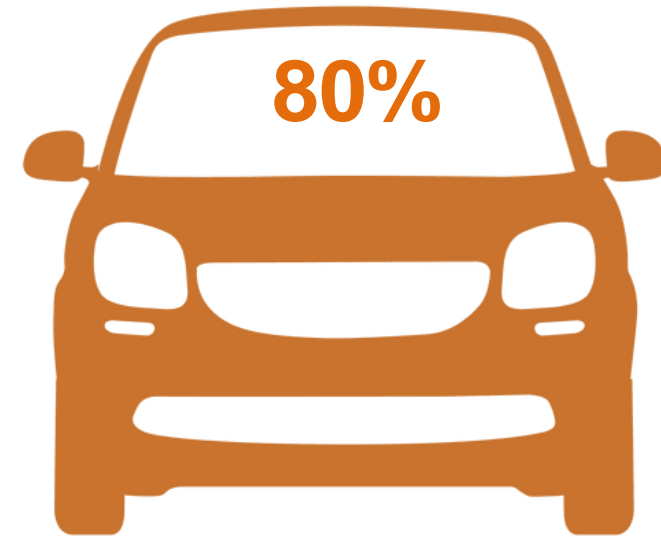
4000
participants
in the online survey

on average

46
years old



51%

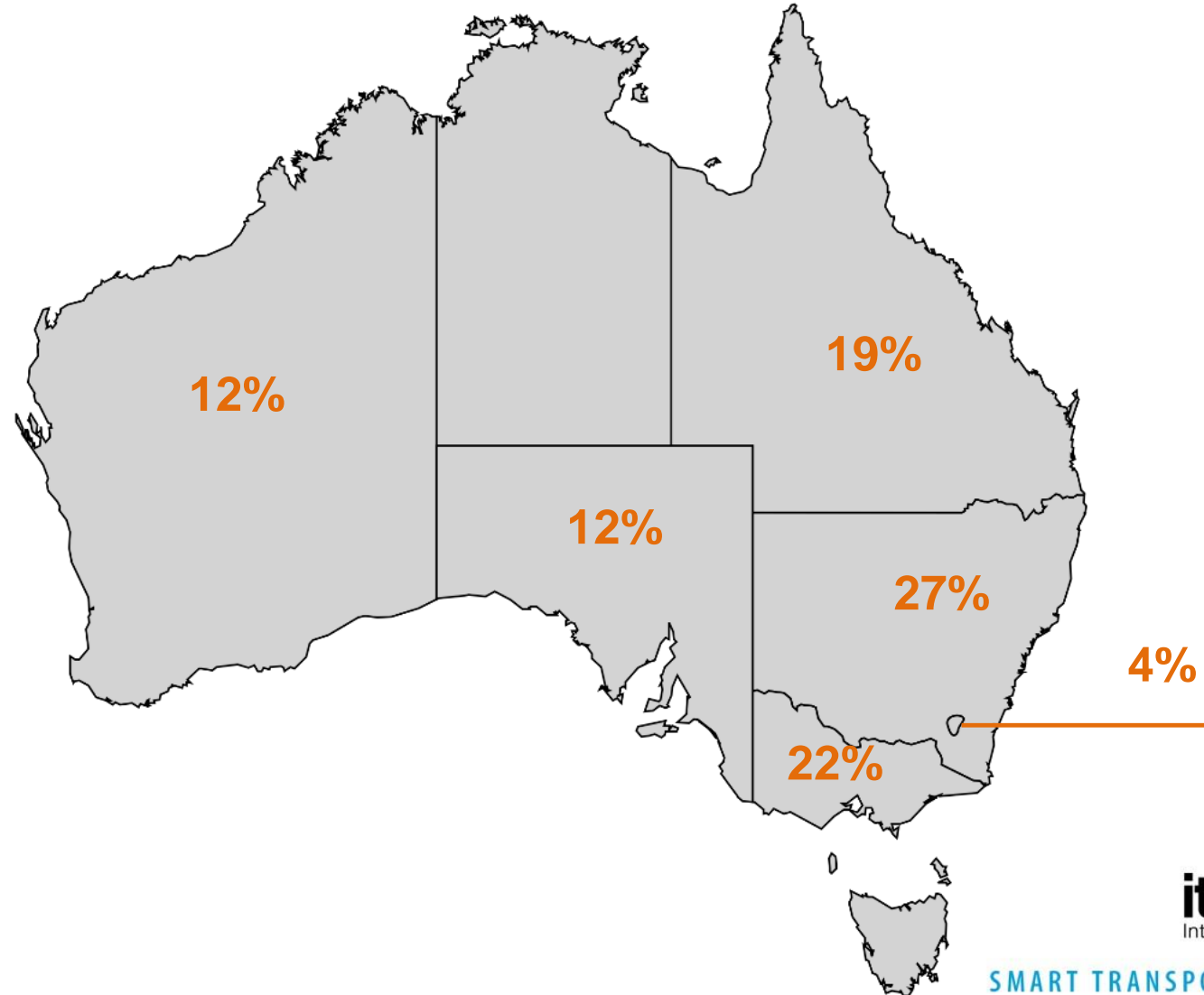


own 1-2 cars

WHERE DO THEY LIVE?

20%
remote &
regional

80%
major cities
& suburbs



WHO WOULD USE IT?

**40% of under 30's
would use MaaS**

Compared to 14% of over 65's



HOW WOULD THEY USE IT?

**41% would use MaaS
for social activities**

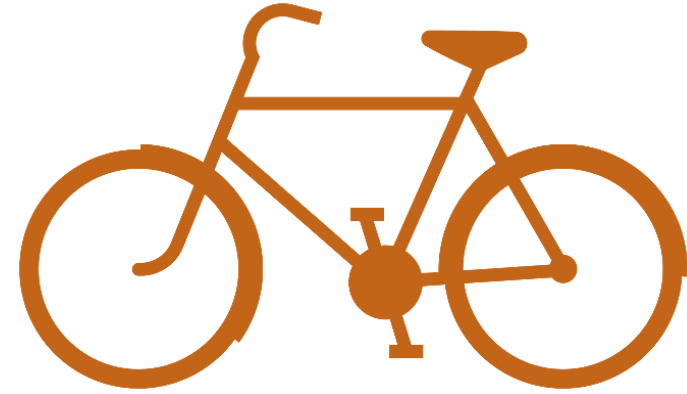
20% would use MaaS to commute, visit friends & family, & run errands



WHAT DO THEY WANT?



local public transit
most popular



bikeshare
least popular

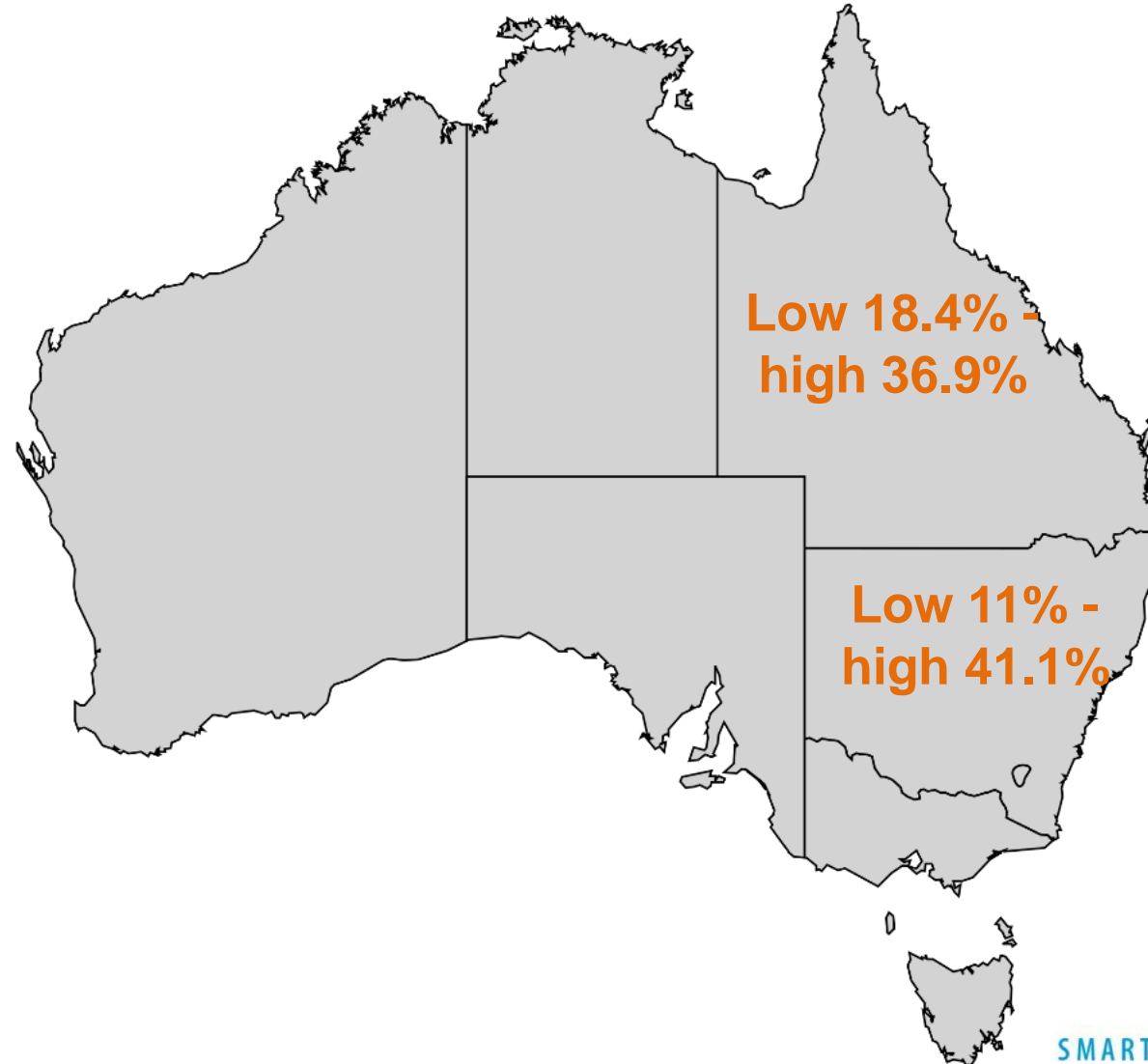
Pay-as-you-go schemes are
2 x more likely
to be purchased than
unlimited access schemes

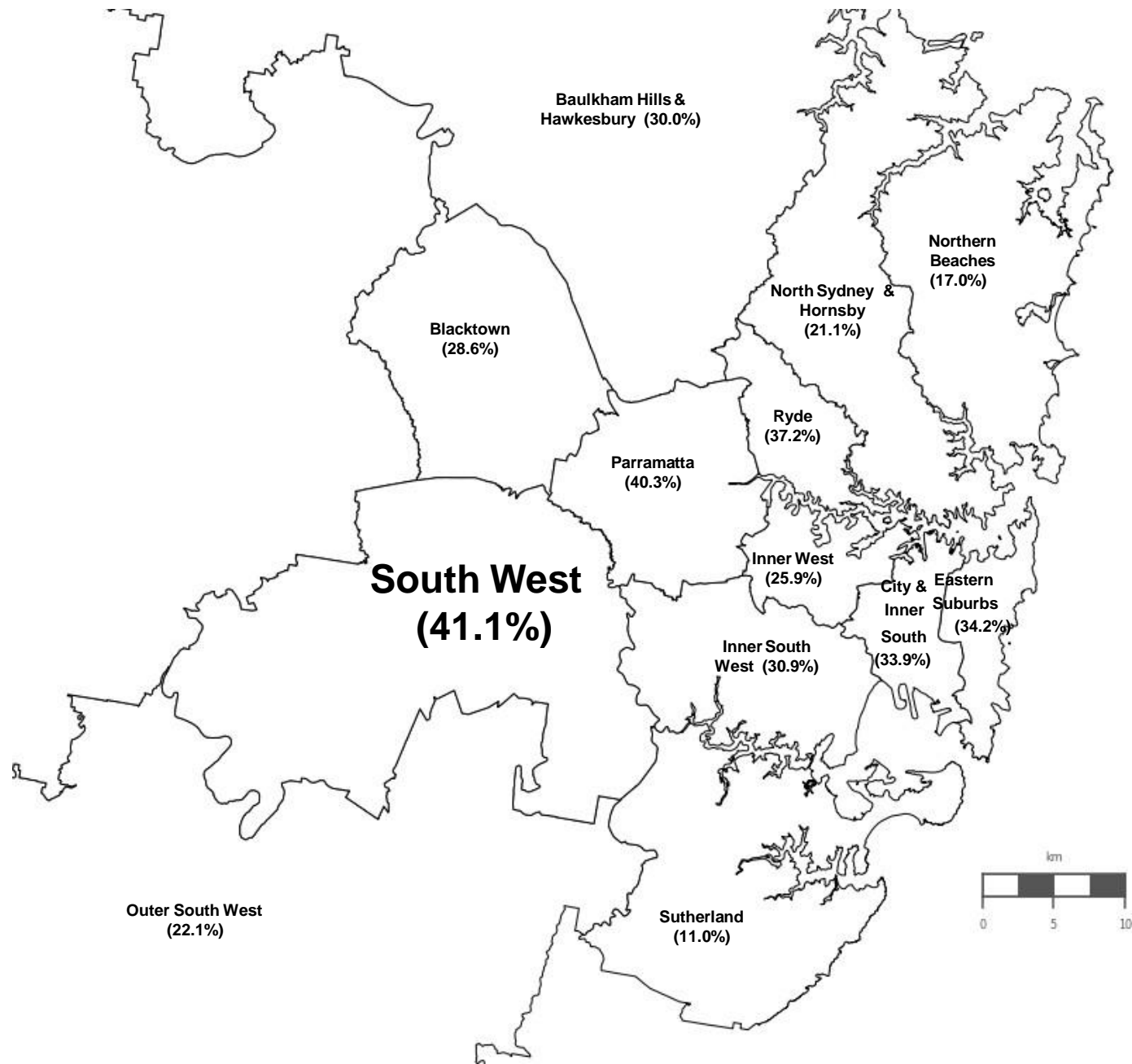


WHERE DO THEY WANT IT?

+30%
Inner cities

+40%
Mid-outer
suburbs





NEXT STEPS

FOR GOVERNMENT:
Share findings to inform the design of supporting policy & regulatory frameworks

FOR INDUSTRY:
Share findings to inform the development & provision of MaaS systems & services that fulfil Australians' needs

PLATINUM MEMBERS



GOLD MEMBERS



SILVER MEMBERS





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Transport Systems
Summit

28–29 August 2018
International Convention Centre
Sydney Australia

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Australia's largest transport technology event - 2018

- Registration is open | Preliminary Program: to be released shortly
- 450+ ITS and aligned industry professionals
- Two days: Industry Keynote Addresses, break-out sessions, workshops, demos, interactive discussion panels
- Exhibition: 40+ industry exhibitors
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SHAPING FUTURE TRANSPORT



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TRAVEL

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Intelligent Transport Systems

21-25 October 2019

Suntec Singapore Convention
and Exhibition Centre

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DAYS

3
HOURS

31
MINS





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