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KNOWLEDGE BRIEF

INTEGRATING MOBILITY SERVICES FOR THE BENEFIT OF OUR CUSTOMERS

INTRODUCTION

Customers are expecting to find in public transport the lifestyle services and connectivity they can find in all aspects of their lives, as well as the basic requirements of comfort, security and cleanliness. Providing door-to-door mobility solutions is essential to answer the needs of today’s customers. The public transport companies that are able to innovate and facilitate the integration of individual and shared mobility services with public transport will be on the winner’s side. They need to be at the forefront of the successful integration of new mobility services such as car sharing, bike-sharing, bicycle parking, shared taxi services, carpooling or demand responsive transport into the mobility service portfolio.

THE SURVEY

The topic of “multimodal mobility” being high on the agenda of the Marketing Commission, a working group was set up to look into combined mobility and the positioning of public transport in a transforming mobility market.

The Multimodal Mobility working group of the UITP Marketing Commission launched two surveys with the kind support of the UITP Combined Mobility Platform. The first quantitative survey was designed to better understand how widespread the concept of combined mobility has been adopted internationally and where experts think this trend is heading. The second qualitative survey aimed at understanding how multimodal mobility is organized in cities, what types of cooperation do exist and what are the barriers and success factors. The second survey was carried out only with those cities who already cooperate or plan to cooperate with combined mobility services.
The survey results speak for themselves: 84 out of 86 public transport companies worldwide consider combined mobility as an opportunity for their organization, and a majority of them believe that the topic’s relevance will continue to grow strongly.

Current Status of Combined Mobility in Cities

According to the survey, operation of combined services by traditional operators themselves is not yet widespread. The general trend is that the concept is developing fast and there are more and more plans to develop new services and cooperation in the future. It is therefore expected that public transport will remain strongly involved in the future in parallel to the emergence of new types of actors which will play an increasing role in medium term.

The Main Benefits of Combined Mobility for Public Transport

Both transport authorities and operators consider that the advantages induced by combined mobility are - to a certain extent - easy to identify and measure.

Firstly combined mobility is expected to improving the image of public transport and to growing the market share of public transport in cities. Indeed the better the image of PT the more attractive it is to new customers.

Secondly combined mobility brings new revenues opportunities derived from the creation of new services. It meets the needs of ever demanding customers with complex mobility behaviour and contributes to increasing customer satisfaction.

It also contributes to reducing the market share of the private car while the use of bikes – private or shared – is growing. In practice, an increasing number of choices are available to travellers. This mitigates the need to own a car in urban areas. Consequently integrating mobility services is positive for the environment lowering congestion and air pollution. Moreover respondents also realize that trip duration decreases when using public transport in combination with other modes.

Still in some cities, the real benefits of combined mobility are difficult to measure mainly because services are not yet fully developed or have been recently implemented.
OBSTACLES TO INTEGRATED MOBILITY

The main obstacles pointed out by respondents are financial with a lack of funding and reluctance of traditional operators to try new models. Financing the extra cost generated by the integration coupled with the hassle of sharing revenues bring additional difficulties. Hence, different mobility actors with different business models do not have the necessary willingness to cooperate as the question of data sharing and customer ownership is a sensitive one. Trust is a keyword here.

The second obstacle raised is the lack of political support. Yet combined mobility requires a very strong political commitment to be successful.

Existing infrastructures and legal issues like the different terms and conditions of the services add to the complexity of creating a one-stop mobility shop.

Furthermore technologies that need to be implemented for an integrated, well-organized, modern system can represent an obstacle as well as the readiness of customers to change their travel behaviour.

However, solutions exist to overcome these barriers and the growing market pressure will push for the integration of all services. One-stop-mobility shops are emerging, bringing convenience, time, and cost savings to the mobility user through technology-enabled real-time, door-to-door, multi-modal travel options that encompass pre-, in and post-trip services.

Two examples in which cities are experimenting with such integrated platforms are Hannovermobil 2.0 in Germany and Vienna’s SMILE project.

MOST EFFECTIVE MEASURES SUPPORTING THE DEVELOPMENT OF COMBINED MOBILITY SERVICES

Respondents consider partnerships/cooperation with local providers as the most effective measure supporting the development of combined mobility services. Moreover physical integration (interchanges/areas with access to all transport modes, bike and car-sharing stations next to public transport stations) and integrated ticketing are highly scored in the survey.

Almost 50% of the respondents deem that integrated travel planners (online platform for information on all mobility services and route search), incentive policies to promote combined mobility (cycling, walking, car-sharing) and one-stop-mobility-shops (integrated platform for ticketing, information, route search and added services) are the most effective measures.

By all means, it is essential to adopt a customer-oriented approach in order to develop solutions that are convenient, easy to understand and to use for customers. Operators have to demonstrate that customers could save time and money, and benefit from a better environment.
NEW ACTORS

New actors have started to play and will play an ever increasing role in the future. The urban mobility landscape is changing fast. In recent years, many players have entered or repositioned themselves in the mobility value chain. Media groups, Internet-related organizations and others have added mobility to their portfolio. Car makers have reinvented themselves as mobility services providers and diversified into car- and ride-sharing, on-demand mobility, parking management, to name but a few. IT services companies have helped providing traveller and traffic management information for many years. More recently, they have also supported information exchanges between travellers, through mobile apps and social media, and they are now looking to provide integrated mobility solutions.

THE FOLLOWING CITIES/COUNTRIES (PT OPERATORS AND/OR AUTHORITIES) TOOK PART IN THE FULL SURVEY (PART I AND II):

Asia
Hong Kong (China), Tokyo (Japan), Seoul (South Korea), Taipei (Taiwan), Bangkok (Thailand)

Americas
Río de Janeiro (Brazil), Vancouver & Laval (Canada), Santiago (Chili), Washington (USA)

Europe
Linz & Vienna (Austria), Brussels & Flanders (Belgium), Prague (Czech Republic), Copenhagen (Denmark), Paris (France), Berlin, Munich & Stuttgart (Germany), Bergamo (Italy), Luxemburg, Oslo (Norway), Warsaw (Poland), Lisbon (Portugal), Moscow (Russia), Madrid (Spain), Lausanne & Geneva (Switzerland), Istanbul (Turkey), Belfast (UK)

CONCLUSIONS

Lifestyles including mobility behaviour are expected to change dramatically in the near future. Indeed 61% of the respondents deem that the share of combined mobility services will continue growing strongly by 2025. Interoperability of different modes of transport will increase as there is a demand for it. Integration of mobility solutions will further grow in order to give customers flexibility of choice.

The public transport companies that are able to seize this opportunity to innovate and integrate individual public transport services will keep their leading position in offering urban mobility services to the citizens.

IN SHORT, COMBINED MOBILITY

- is expected to improving the image of public transport and to growing the market share of public transport in cities.
- meets the needs of ever demanding customers with complex mobility behaviour and contributes to increasing customer satisfaction.
- brings new revenues opportunities derived from the creation of new services.
- also contributes to reducing the market share of the private car.