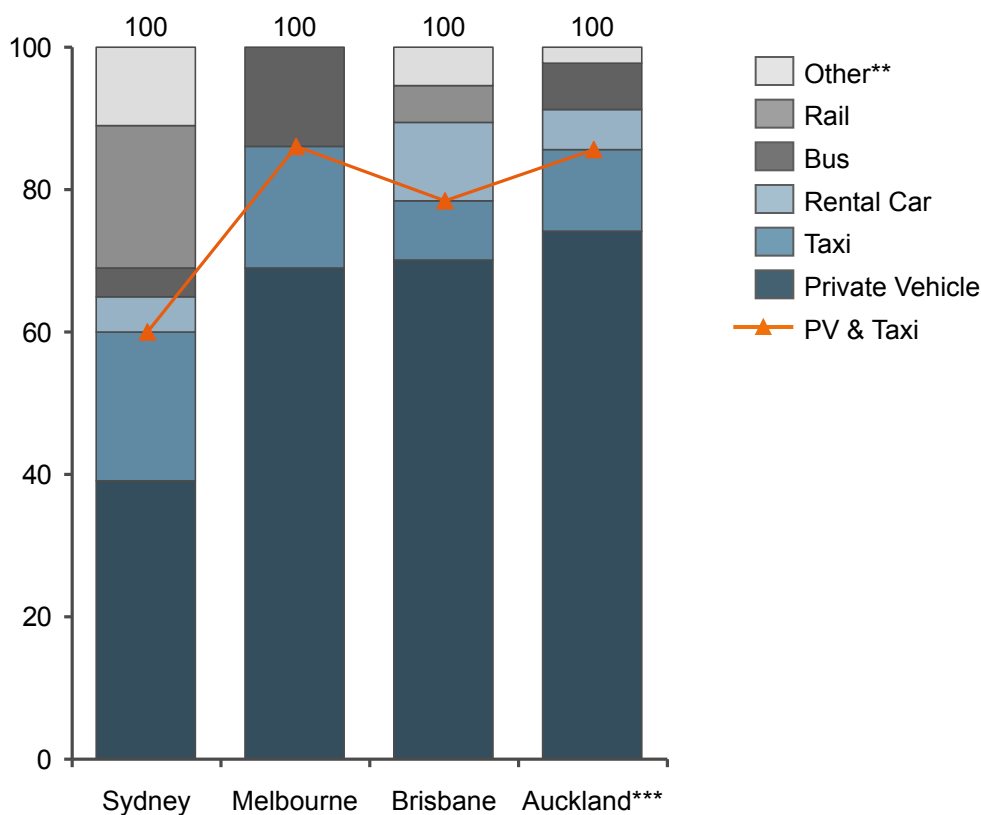


# Private vehicles and taxis dominate the ground transport task, creating congestion, travel delays and reduced amenity

Airport access mode share in Australia and New Zealand\*  
Percent



## Impact on customers/airport



Unreliable transit time due to increasing traffic



Increases door-to-door travel time (i.e. need for buffer)



Higher than anticipated airport access costs (e.g. taxi)



Increased congestion in and around airport precinct

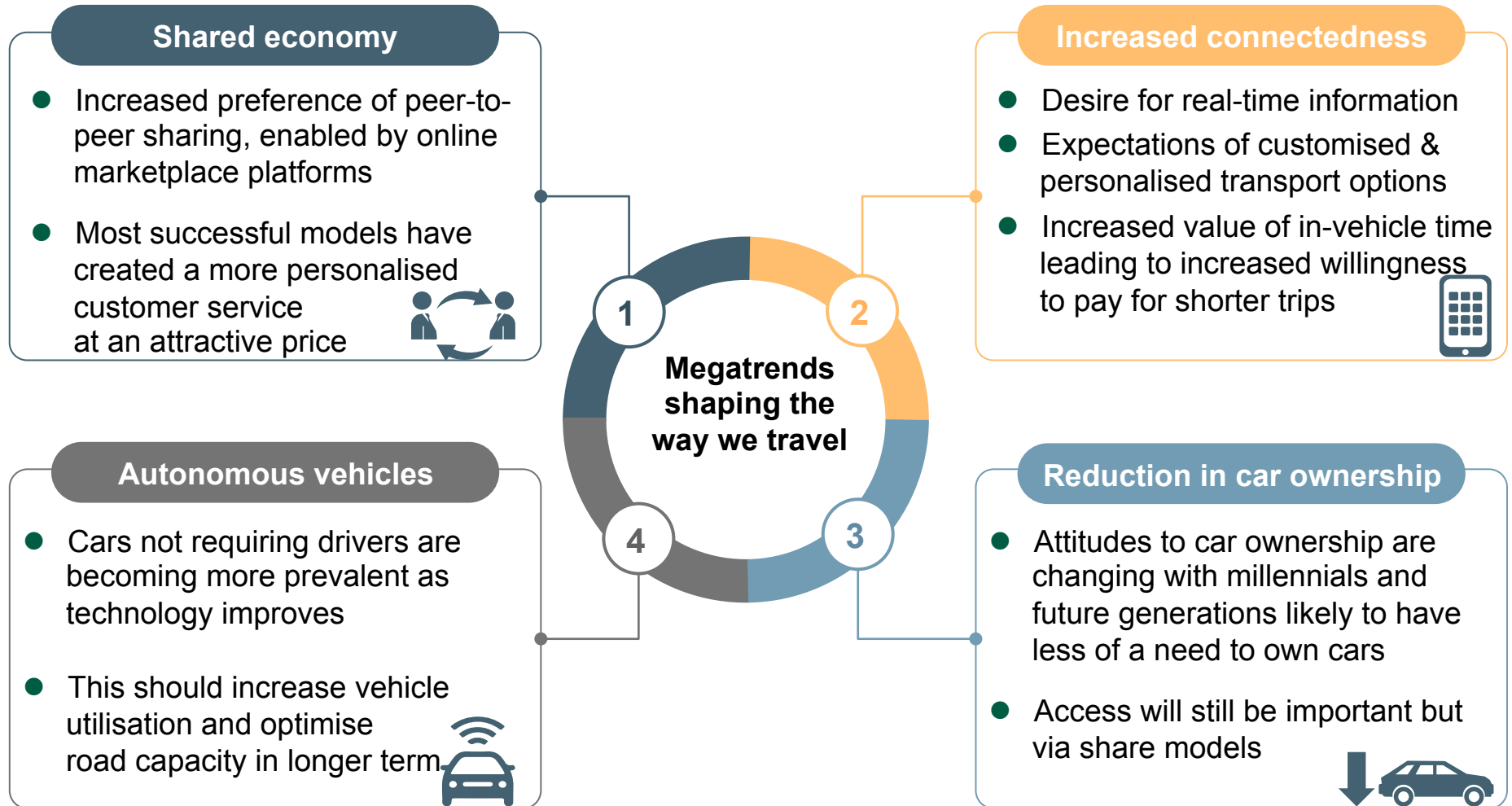


Reduces attractiveness of airport for customers and airlines

Note: Mode shares sourced from a range of publicly available data and discussions directly with the Airports. \* Melbourne airport bus mode share includes private shuttles, Perth Airport bus mode share data represents public transport mode share to the domestic terminal only, Brisbane rail mode share is 5% airport wide and 10.5% of mode share at terminals; \*\* Includes active transport, private coaches and shuttles; \*\*\* Assumes a 30% employee 70% visitor split of total journeys

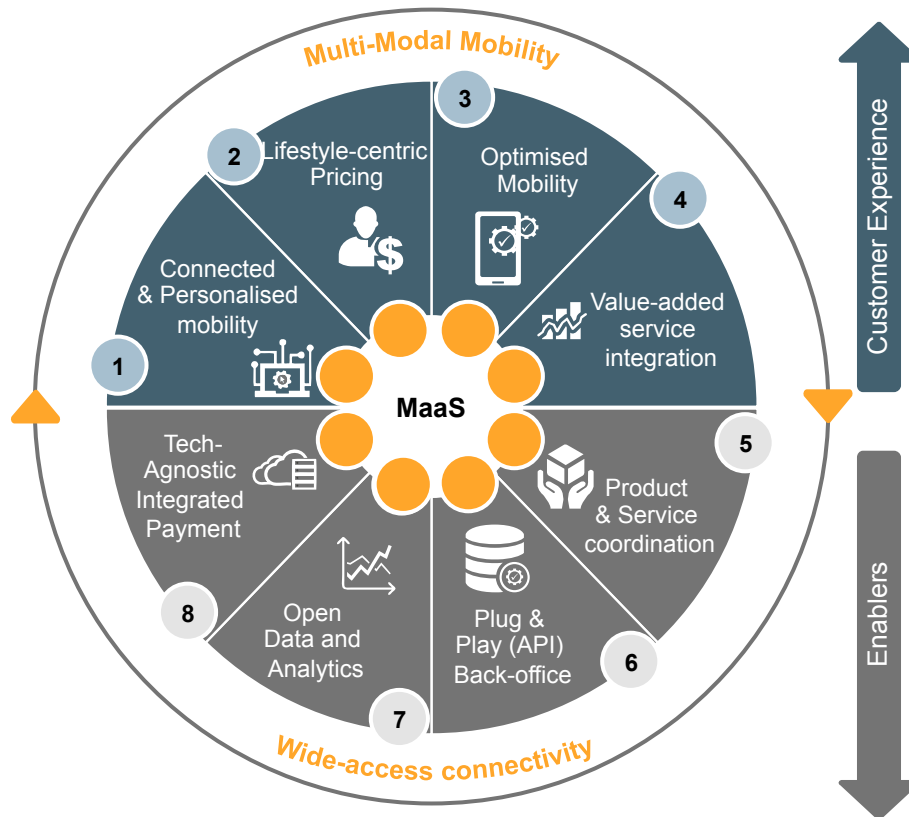
Source: TTF Accessing Australian Airports Report; The Canberra Times; L.E.K. research and analysis

# What are the megatrends shaping the way we travel?



# What is Mobility-as-a-Service (MaaS)?

## MaaS key attributes



### Connected and personalised mobility

- Improves the quality and convenience of travel (i.e. on-demand, personalised, seamless and predictive journeys)

### Value-added service integration

- Provides users access to end-of-journey products (e.g., a ski resort)

### Lifestyle-centric pricing

- Decreases the cost of mobility by widening the range of suppliers and increasing accessibility

### Optimised mobility

- Redistributes travellers to the optimal mode of transport (by cost, etc.)
- Potentially lowers traffic congestion and the environmental impact of transport
- Reduces overall transport times by informing network improvements

# Key benefits for airports and passengers



## Passengers



Optimal and efficient journey planning



Optimal mode choice decisions



Better use of in-vehicle time



Improved customer experience



Reduced stress (end-to-end journey)



**Improved travel experience and satisfaction**



## Airports



Improved accessibility



Should reduce road congestion



Improved customer satisfaction



Supports growth (reduces friction)



Increased data on passengers  
providing transparency on their needs

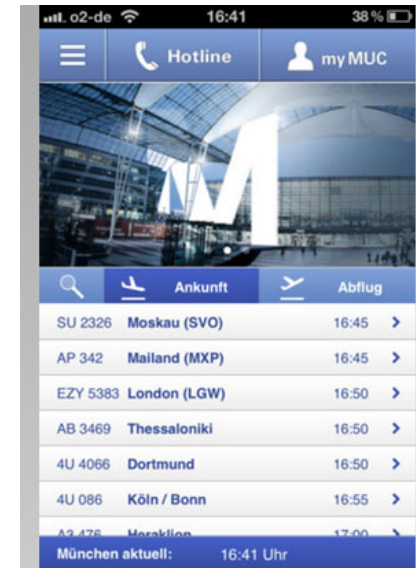
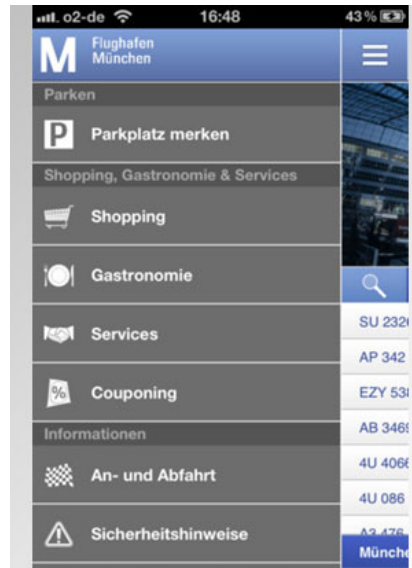


**Improved accessibility and profitability**

# Germany – Munich Airport



## Example: Munich airport passenger / mobility app



- By integrating transport data, traffic information, and flight data, the app:
  - delivers passengers with a real-time solution to trip planning queries & a full view of their journey
  - allows comparisons of transport options from the city to the gate
  - provides real-time data on airport flights & logistics issues
- Airport management believes future customers will be able to buy an intercity multi-modal single ticket
- A key enabler of this is the real-time data sharing between airports, transport providers, and IT providers

Source: Munich Airport; Tnooz Article: *Digital innovation and the passenger experience*, 2017; Future Travel Experience article: *Munich Airport aims to simplify and enrich customer experience with Strategy 2020*, 2017

## New Zealand – Queenstown MaaS pilot

### Why Queenstown?

- Queenstown is the 'the adventure capital of the world' and boasts a range of adventure attractions for tourists
- Passengers via Queenstown Airport has **grown steadily at over 10% pa** over the last 10 years with recent growth of 18% over 2015-16
- Queenstown is located around a lake, with limited opportunities for road infrastructure expansion and a highly seasonal peak for transport demand in the winter season
- Key attractions such as ski-fields are accessible by road only – with winter time traffic jams a significant issue for visitors and residents
- Traffic congestion is one of the top issues that the Queenstown Council is addressing in its 10 year plan

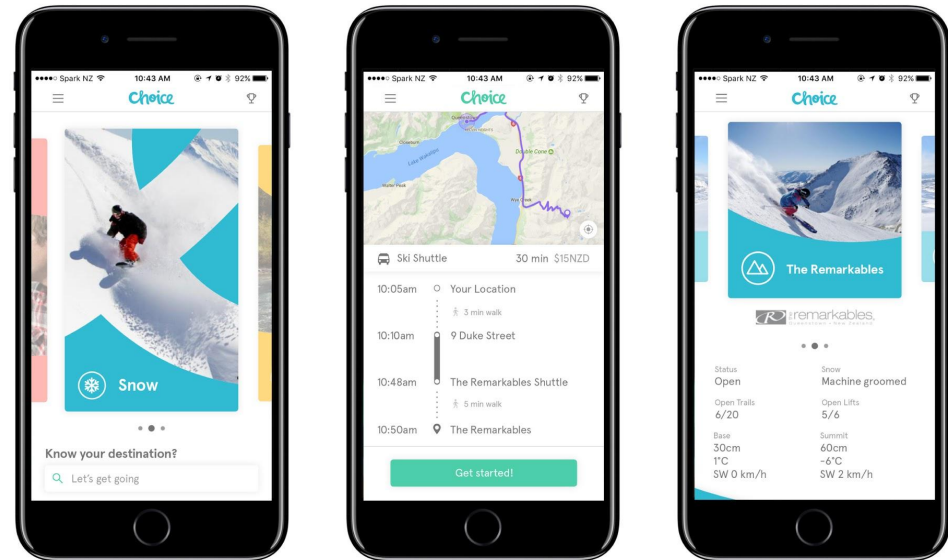


## New Zealand – Queenstown MaaS pilot



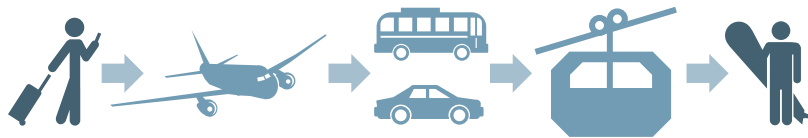
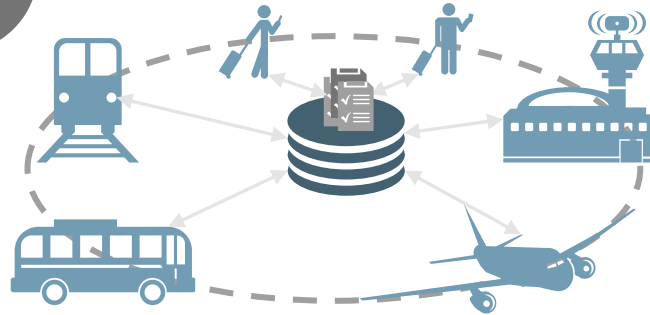
### How the “Choice” app makes Queenstown Possible

- The New Zealand Transport Authority (NZTA) in collaboration with Queenstown transport providers will launch a large scale mobility marketplace pilot in August 2017, accessible via an app called **Choice**
- **Choice** aims to reduce Queenstown’s congestion and improve visitor experience by facilitating visitors’ access to the full range of available transport options in Queenstown from the airport, to the ski fields and back without the need for a private car
- **Choice** allows customers to interact with transport providers to select and book real time transport options, making it simple for visitors to plan and reach their destinations



# New Zealand – Queenstown MaaS pilot

## Queenstown MaaS Pilot - Innovations



### 1. Open Data Sharing Ecosystem

- Data will be easily accessible for reuse by participants integrating flight arrival times with transport providers
- Personal data collected requires the consent of users to share
- Airports that participate in open data sharing will have access to valuable customer data

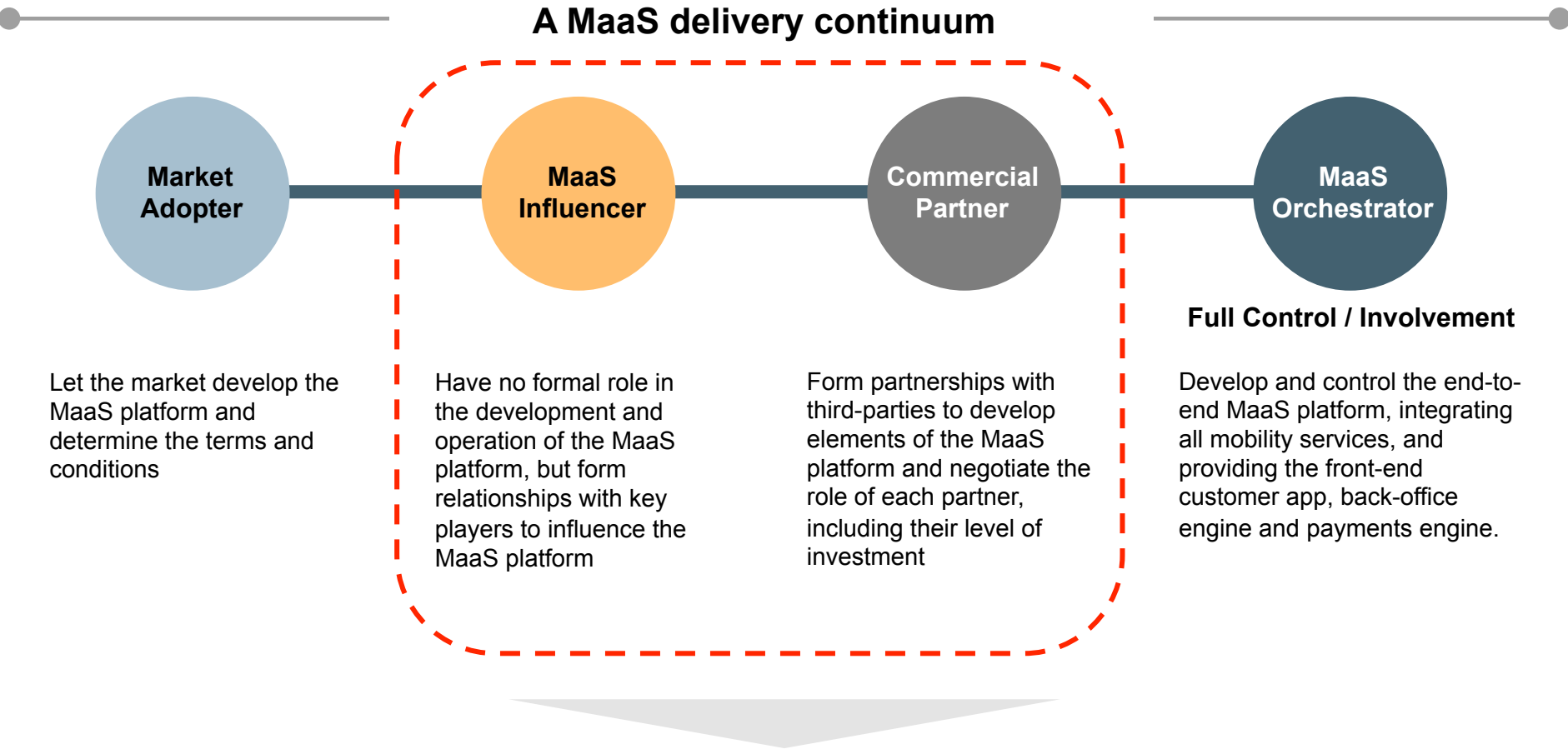
### 2. Real-time mobility Marketplace

- Utilises gaming technology that connects data from various silos
- The marketplace enables analytics and market governance
- The mobility marketplace will help enable ground transport operators to optimise the offering to customers in real time

### 3. Integration with Tourism and Transport Operators

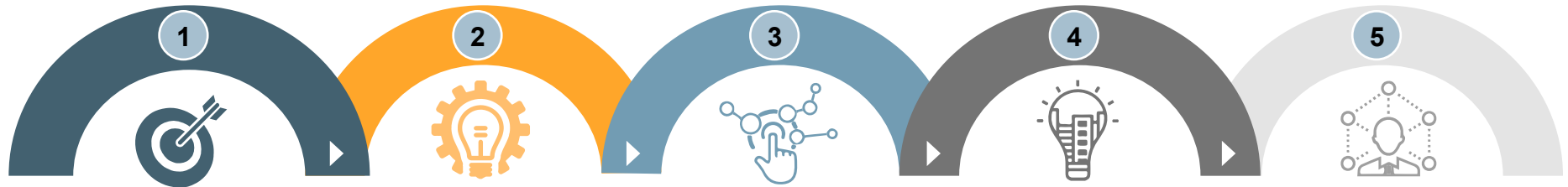
- The app integrates tourism and transport operators to visitors
- This enables visitors to go from the airport, into town, to the ski fields and back to the airport through the app
- Transport operators will get data on flight arrival times, in the event of incoming delays, reducing congestion in the airport

# Airports need to consider their role in the MaaS ecosystem



**In order to be successful in the MaaS landscape, airports need to be well informed on the capabilities and implications of the MaaS ecosystem for all stakeholders**

## Implications for airports



Airport will need to evaluate their technological capabilities, identify capability gaps, and align future activities with relevant strategic objectives

Airports will need to begin developing the skills and capabilities to deliver and integrate with a single real-time network management platform

Airports should engage early as they much to gain from collaboration, experimentation, and planning for ecosystem integration

Airports will have a role in a MaaS ecosystem which will require them to engage with mobility providers, a broader set of stakeholders, and emerging business / service models

Airports will need to consider what governance structures and team skills they will need to develop to participate in MaaS ecosystems