

A woman with curly hair, wearing a dark sleeveless top and a backpack, stands on a bridge railing. She is looking at a smartphone in her right hand. The background shows a city skyline across a body of water, with a bridge structure visible on the left. A large blue diagonal graphic element is in the top-left corner.

# Stakeholder Perceptions 2021

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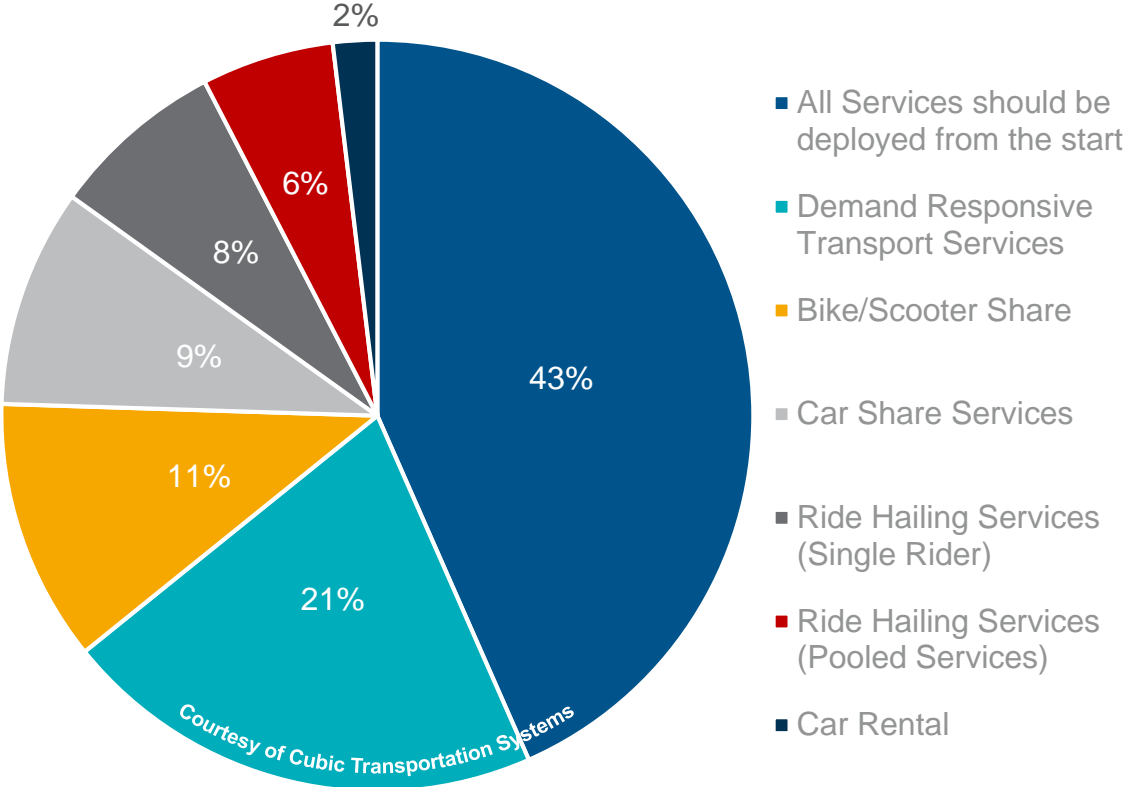
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# Survey conducted

- Online survey conducted spring 2021
- Purpose was to provide primary research feed into the MaaS discussion
- Global audience of relevant stakeholders
- Full results: [MaaS Survey Results Landing Page \(constantcontactpages.com\)](https://constantcontactpages.com)

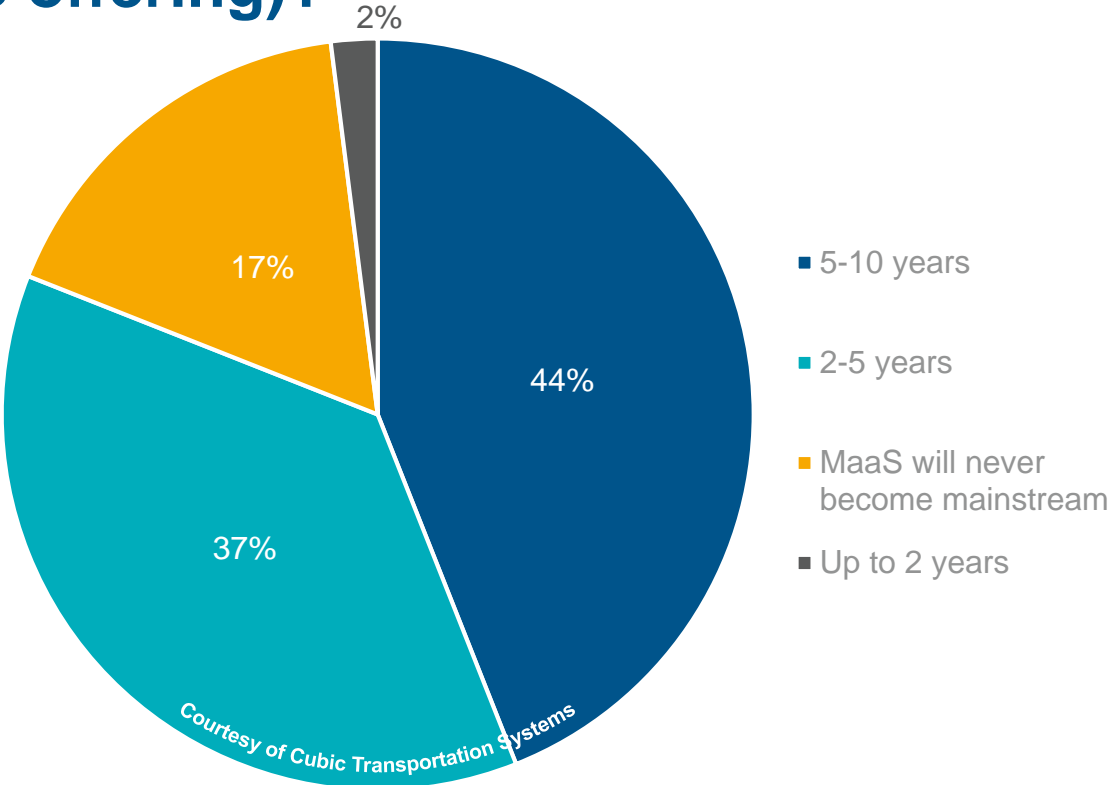
# When deploying MaaS/MOD, what services should be considered first?

The majority of stakeholders said all mobility services should be provided from the start of any MaaS trial. When this is analyzed from a public agency perspective and you examine the responses aside from 'All Services', it becomes clear that agencies' prefer to integrate and offer DRT, then bike/scooter share, then car share, then TNC services in that order.

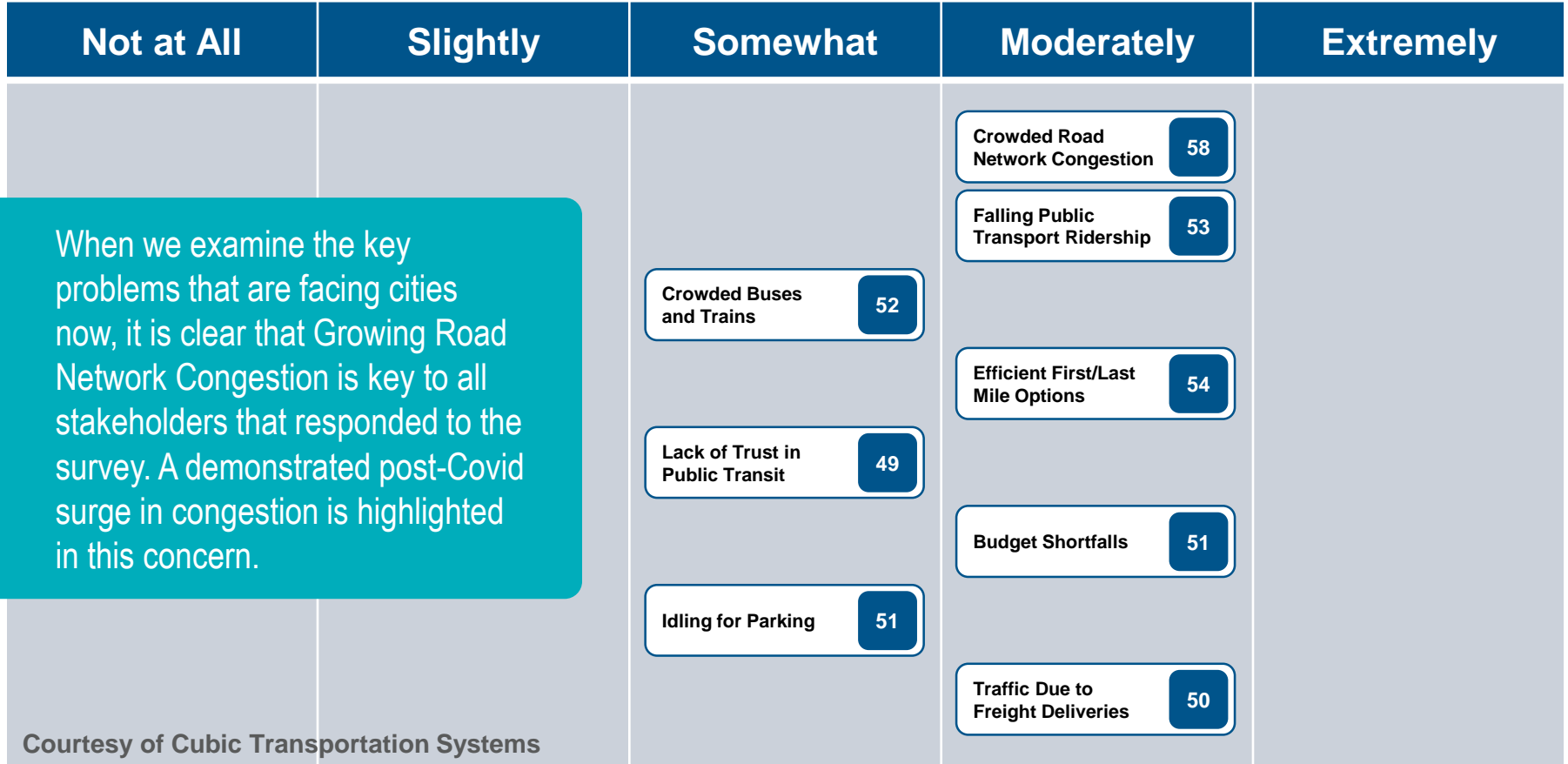


# On what timescale do you think MaaS/MOD will become mainstream (more than 30% of cities in your region and/or country have a MaaS offering)?

The majority of users expect MaaS to become mainstream in 5 to 10 years. Fortunately for all the stakeholders in the MaaS/MOD ecosystem, only 16% think that MaaS and MOD will never become mainstream.



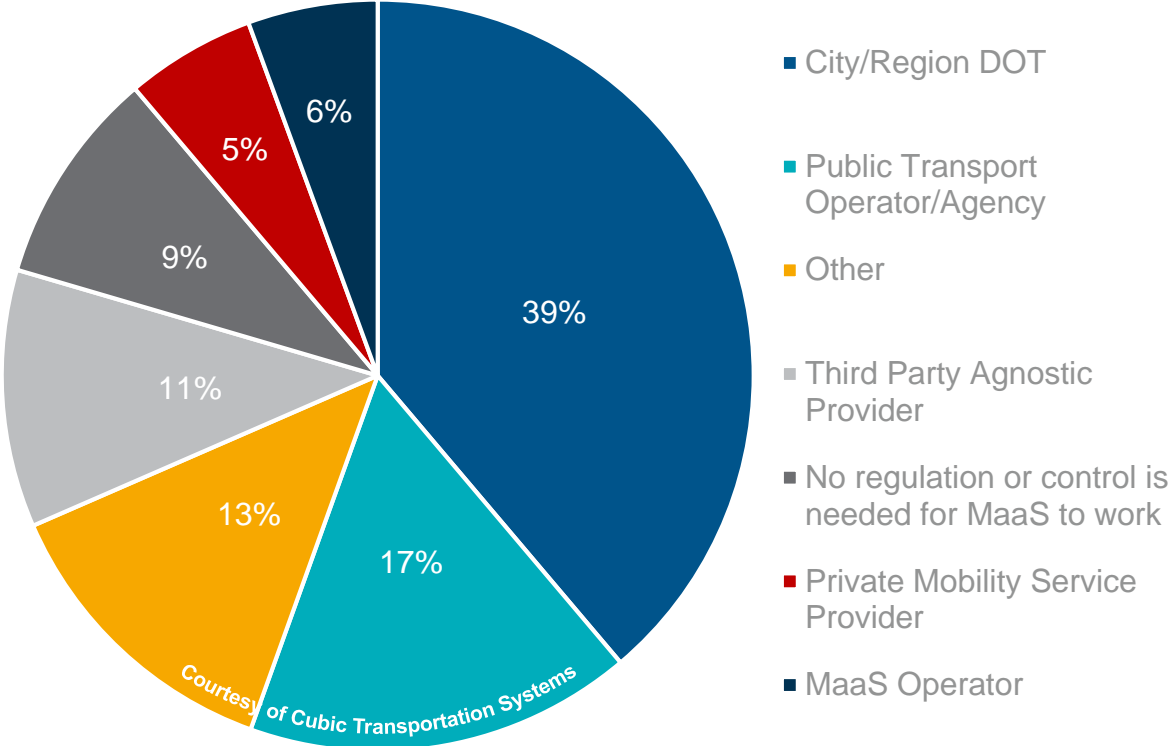
# How pressing are the following problems for your city and/or region?



Courtesy of Cubic Transportation Systems

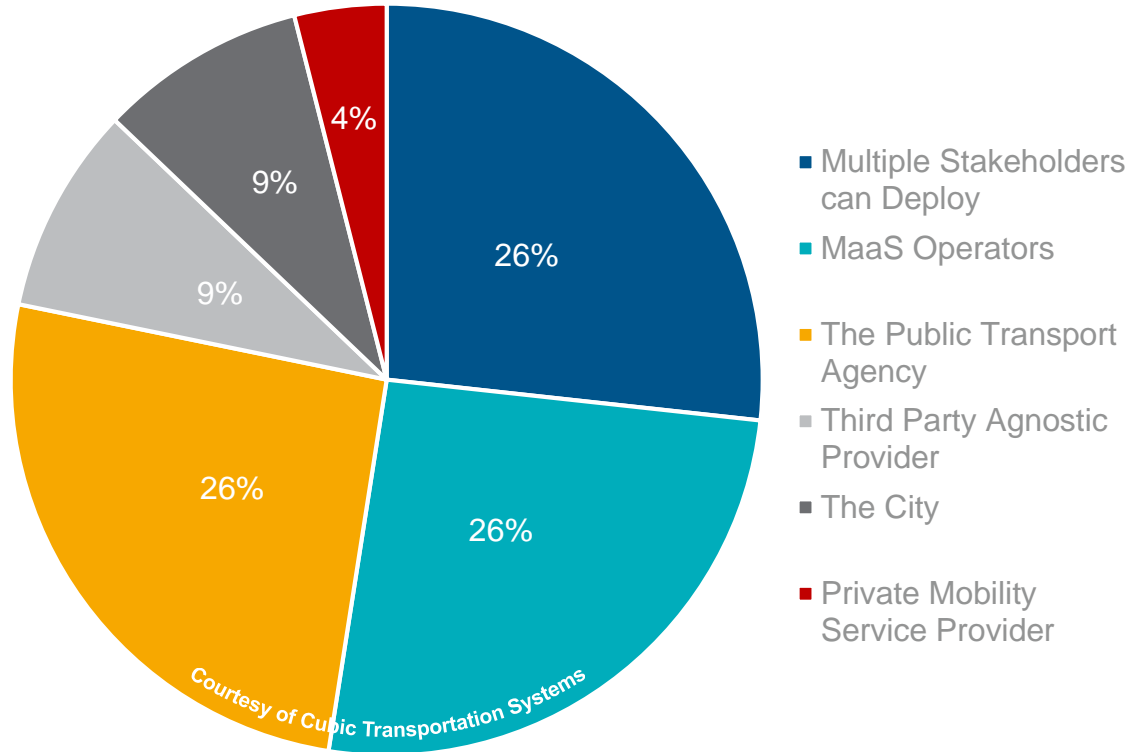
# Who should be responsible for regulating and coordinating MaaS/MOD Services in a city and/or region?

The majority (>55%) of respondents said that a public agency of some form should be responsible for the regulation and coordination of and MaaS/MOD service.



# Who should be responsible for delivering MaaS/MOD in a city and/or region?

Surprisingly, when we discuss who should deliver MaaS, there is a fairly even split between a MaaS Operator, the Public Transport Operator and an open market multiple stakeholder approach. Given the limited deployments to date we expect this to vary over time.



# Summary Headlines

- Most stakeholders expect all services to be integrated into a MaaS/MOD platform
  - *In this set of results, we expect a priority starting with demand responsive transport, followed by bike/scooter share, car share and TNC services*
- Those expecting MaaS/MOD to take hold in the next 5 - 10 years highlight major city mobility challenges like congestion, crowded public transport, lack of efficient first mile/last mile options and idling for parking as pressing issues.
- 16% of MaaS/MOD stakeholders expect it will never become mainstream
  - *81% believe MaaS will become mainstream in the next 5 years*



# Thank you!

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