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GETTING
FROM A TO B

The Forces Shaping the Mobility Sector and the Consumer Needs that are being missed.

Australian mobility is shifting.

It is no longer just about how we get around, it's the freedom to move forward.

Australia is a nation built on distance and defined by movement. We pride ourselves on exploring the world and our communities and staying physically connected through systems that let us live, work and explore.

And now, those systems are being reimagined for a new era . They are being reshaped by technology, energy, and the expectations of a modern nation.

In this study we have focussed on the automotive sector, ride-share and alternative transport providers along with government, for policy and provision of mass transport.

One thing that has become clear is, in order to win in this modern era, brands and policy makers must understand the competing priorities and tensions in the sector, the forces shaping the industry and the needs of a modern consumer, to deliver the most impact.

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The mobility sector is experiencing unprecedented change driven by external forces...

7 Forces Shaping the Mobility Sector

From technological advances to new business models and net zero impacts. External forces are impacting what mobility will look like in the future.

Research conducted by The Growth Distillery, 2025. Qualitative research with n=50 Australians in September 2025, with a Quantitative survey via the Lighthouse consumer tracker in October 2025, including n=2500 respondents.

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But when those external forces pull a sector away from consumer needs, there is an opportunity for those willing to bridge the gap.

7 Forces Shaping the Mobility Sector

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7 Consumer Needs for Mobility

From value, immediacy and connection, the fundamental needs underlying mobility are as old as time. But they are increasingly being overlooked for the latest technological advance.

Research conducted by The Growth Distillery, 2025. Qualitative research with n=50 Australians in September 2025, with a Quantitative survey via the Lighthouse consumer tracker in October 2025, including n=2500 respondents.

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Mobility is no longer just about getting from A to B, it's about what it enables, Freedom and Connection.

Growth lies in aligning with fundamental consumer needs and making these complex systems consistent and accessible.

PART I:
THE FORCES SHAPING MOBILITY

The seven systemic forces driving change.

We have identified seven macro forces changing the future of mobility in Australia. These are large-scale dynamics spanning global trends, economic shifts and technological innovation, and they are defining the conditions under which Australia's mobility sector, brands and policymakers must adapt to in order to grow.

1 | CONNECTED AND INTELLIGENT **SYSTEMS**

2 | THE A RACE TO **(NET) ZERO**

3 | THE NEW **ECONOMICS** OF MOVEMENT

4 | FROM OWNERSHIP TO **ACCESS**

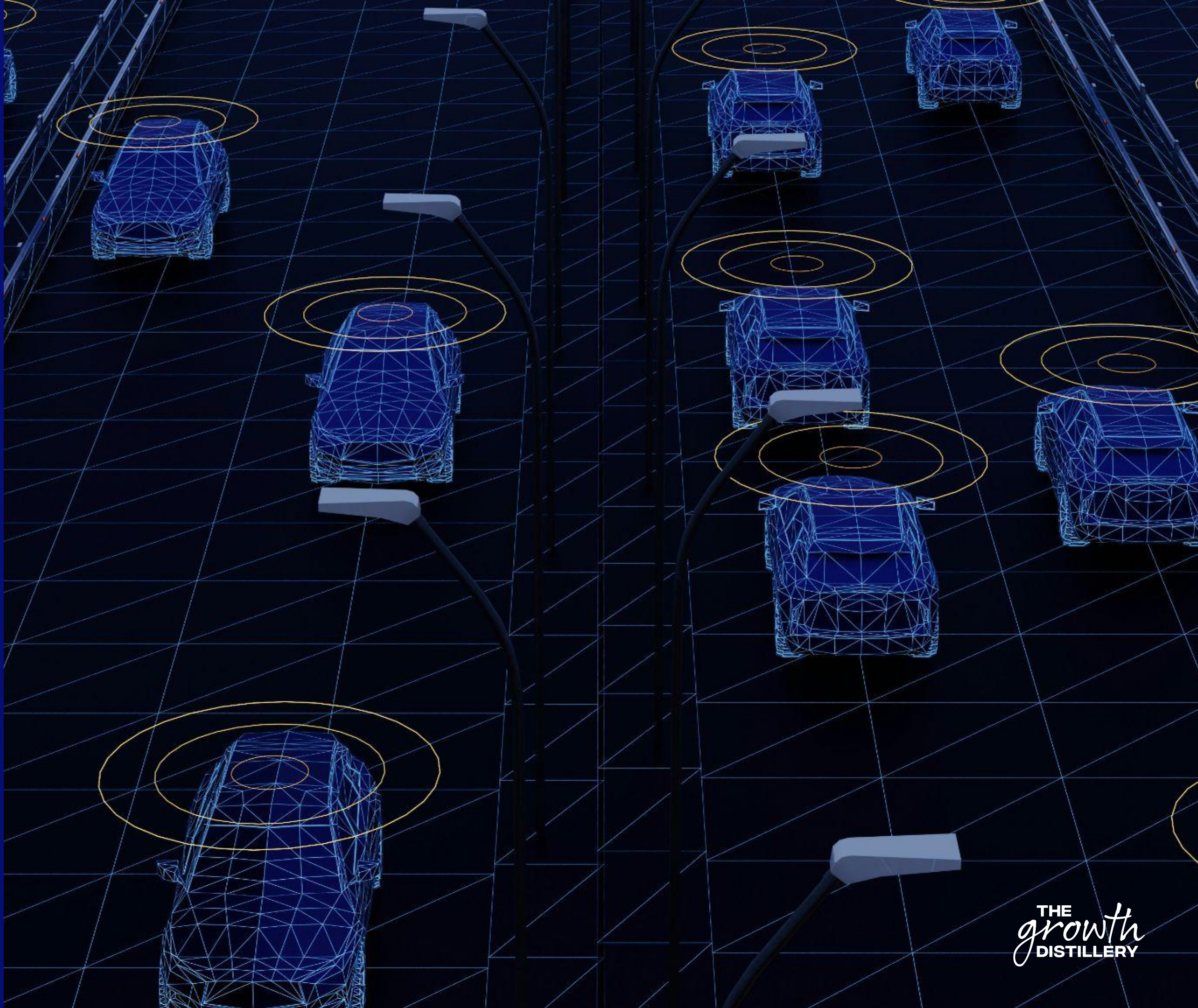
5 | THE **EXPANSION** OF MOVEMENT

6 | MOBILITY AS **EXPERIENCE**

7 | EVOLVING PATTERNS OF **PLACE**

FORCE 1:
INTEGRATION OF CONNECTED AND INTELLIGENT SYSTEMS.

The emergent and increasing integration of digital networks, automation and data-driven infrastructure into vehicles, services and energy systems is allowing them all to operate seamlessly together.



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How do we know this?

FORCE 1: Connected and Intelligent Systems.

Platforms are leading with Integrated Mobility as a Service (MaaS) and AI optimisation

Unified apps orchestrate multi-modal transport in real time, letting people plan, book and pay seamlessly while AI aligns capacity with demand.

Singapore's SimplyGo unifies buses, MRT (Metro) and ride-hailing in one app and uses AI to predict demand.

Autonomy is moving from pilots to paid services

Driverless services are scaling from trials to paid rides, with regulatory change set to widen access and embed autonomy into everyday networks.

Waymo recorded more than 200,000 paid robotaxi rides per week across Los Angeles, San Francisco and Phoenix in February 2025.

Smart charging ecosystems linking energy and retail

EV charging is being grid-managed and co-located with retail, turning refuelling into a convenient, connected service experience.

Starbucks, Tesla and others are installing chargers at F&B and retail locations, making charging points THE destination.

FORCE 2:
A RACE TO (NET) ZERO.

The accelerating transition toward low-emission and renewable energy solutions is impacting every mode of transport. This has been driven by policy, innovation and consumer expectations of different fuel types and infrastructure.

How do we know this?

FORCE 2: A Race to (NET)Zero.

EV adoption is accelerating

Electric vehicles are moving into the mainstream across major markets, setting new expectations for low-emission travel.

Over 17 million electric vehicles (EVs) were sold globally in 2024, representing 22.8% of worldwide car sales. Sales of internal combustion engine cars are believed to have peaked in 2018.

As infrastructure scales, equity gaps emerge

Charger rollout is rapid, however, it remains uneven across urban and rural areas, putting pressure on public, private and peer-to-peer solutions to ensure fair access.

The number of public chargers globally has doubled since 2022, with 1.3 million added in 2024 alone.

Australia is already playing catch-up

Australia is already lagging behind on infrastructure for public charging and is second lowest globally only to New Zealand for number of charging points per EV.

There are currently 45 EVs per charging point in Australia, compared to 1.8 EVs per charging point in South Korea, 3.4 in India and 5.5 in The Netherlands.

FORCE 3:

THE NEW ECONOMICS OF MOVEMENT.

The global cost of living crisis is shifting financial realities for many, which is influencing how people are able to move. Rising costs see a growing demand for affordable and flexible access options across the board.

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How do we know this?

FORCE 3: The Economics of Movement.

Even entry level vehicles are increasingly out of reach

Rising vehicle prices are pushing Australians to borrow more, or delay purchases altogether as cost-of-living pressures intensify.

Average new car prices are up ~20% over the past five years, while used car prices remain ~23% above pre-pandemic levels. Entry-level new cars under $20k have effectively disappeared from the market.

Transport costs are a rising source of household stress

Higher running costs are pushing households to cut driving and maintenance, nudging uptake of cheaper and more flexible alternatives.

The weekly cost of running a car rose from $415 to $459 in 2024. 71% of Australians say they're cutting driving expenses and 60% have adjusted maintenance.

Affordable shared mobility is scaling

Pooled and peer-to-peer trips offer lower-cost travel, expanding access during cost-of-living pressures.

UberPool trips rose by a factor of 3.7 in the year to Nov 24. The carpool-as-a-service market is projected to grow from $8.2bn to $36.3bn by 2033.

FORCE 4:
OWNERSHIP TO ACCESS.

The evolution of personal transport from a product people own to a service they use and share.

New models around subscriptions, sharing and on-demand mobility are emerging, alongside a flood of new brands and technologies, giving consumers unprecedented levels of flexibility.

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How do we know this?

FORCE 4: FROM OWNERSHIP TO ACCESS.

Car-sharing and peer-to-peer expand choice.

Hourly access and peer rentals provide on-demand mobility without the financial and maintenance burdens of ownership.

The global car-sharing market is forecast to rise from A$13.5 billion (2024) to A$37.1 billion (2033).

Subscriptions surge, led by younger cohorts.

Flexible subscriptions let people switch or cancel without long commitments, aligning with younger preferences and driving market growth.

Globally, 18% of consumers favour car subscriptions, and this increases to 28% among 18–34s.

Brand mobility ecosystems are expanding beyond ownership.

Automakers are bundling multi-mode access and member benefits, shifting loyalty from owning a model to belonging to a platform.

Jaguar Land Rover's Pivotal enables members to seamlessly swap models, while Toyota's KINTO Flex and MaaS partnerships extend access across modes.

FORCE 5:
THE EXPANSION OF MOVEMENT.

The diversification of mobility through emerging modes is introducing new ways to move (in addition to the already expanding range of traditional vehicles) which are extending how and where people and goods can travel.

- Personal micro mobility
- Service oriented fleets
- Autonomous vehicles

How do we know this?

FORCE 5: THE EXPANSION OF MOVEMENT.

Personal micro-mobility reduces short car trips.

E-bikes and scooters replace many sub-5km journeys, saving time, money and space while widening local access.

Australian e-bike sales climbed from 100k in ‘22 to 193k in’ 23. With evidence showing e-bikes cut sub-5km car trips across the board. Shanghai study reduced short car trips from 47% to 28%.

Shared micro-mobility grows, but private still dominates.

Shared fleets exist, yet most use is via privately owned devices, limiting wholesale car displacement.

Australia’s shared e-bike fleet totals 3,140 across major cities, which is dwarfed by private ownership. Globally, cargo e-bike access in Germany led only 7–18% of participants to sell or avoid buying a car.

Service-oriented aerial and automated mobility.

Drones, eVTOLs and autonomous fleets extend logistics and passenger reach with faster, more efficient services.

Global eVTOL market is projected to surge from A$5.05 billion in 2025 to A$259 billion in 2034. Testing for Australia’s AMSL Aero Vertiia started in 2024.

FORCE 6:

MOBILITY AS EXPERIENCE.

The reimagining of transport as part of everyday wellbeing and lifestyle, as vehicles and services evolve to support comfort, connection and recreation as much as transit.

How do we know this?

FORCE 6: MOBILITY AS EXPERIENCE.

Entertainment-first vehicles.

In-car platforms are turning vehicles into entertainment spaces with streaming, gaming and immersive content.

The market is set to grow from A$25 bn in 2023 to A$53.9 bn in 2030. Brands like Mercedes' RideVu with Sony IMAX-enhanced content and BMW's UNO via AirConsole, are leading the way in infotainment.

Wellness and companionship on the move.

Cabin tech adds wellbeing features and conversational support, transforming travel into restorative downtime.

With 29% of US drivers staying in their car to relax before going inside, products like Lincoln's Rejuvenate massage seats, ambient lighting and Calm-powered sessions and Citroën's ChatGPT integration offerings conversational support are transforming cars into restorative spaces.

Community and hybrid brand spaces.

Brands use membership apps and club-like venues to cultivate community and lifestyle value around mobility.

Rolls-Royce's Whispers connects owners to curated experiences; Lynk & Co's hybrid clubs combine showrooms with co-working and networking spaces, with Australian entry expected in 2026.

FORCE 7:
EVOLVING PATTERNS OF WORK & PLACE.

The reconfiguration of where and when people move, shaped by hybrid work, new urban hubs and the changing balance between home, office and community life.

How do we know this?

FORCE 7: Evolving Patterns of Work and Place.

Hybrid work reshapes transport use.

As hybrid working becomes the norm, patterns of public transport use and more local mobility need to be reimagined.

38% of people working from home two or more days a week. Demand is therefore, shifting across times, modes and hubs, as their mobility needs change.

Cities expand smarter, high-capacity networks.

Urban systems are adding capacity and integrating modes to handle growth and deliver smoother, more reliable journeys.

Brisbane plans 41 million additional rapid bus transit seats over eight years ahead of the 2032 Olympics; MaaS trials like Odin Pass inspired 1 million public transport trips (2021–2024), evidencing integrated, flexible uptake.

Longer commutes are the COVID hangover here to stay.

Australians are travelling further and longer for work, now hybrid work is embedded, reshaping demand across modes, times and hubs.

The average daily commute now takes 64 minutes and covers 37 km, up 10 minutes and 5 km since 2022.

Where the forces lead from here

The seven forces reveal an ecosystem in motion, where technology, energy, and economics are reshaping how the world moves.

These are not distant trends, they are already actively influencing design, investment and policy and so representing real and near-term challenges that will define the future of mobility for Australia and Australians.

Recognising these macro dynamics is essential, but so is understanding how they intersect with people's lived experiences and expectations. To build a mobility future that delivers growth and public trust, business, government and media must ensure innovation credibly aligns with the everyday realities of Australians.

WAIT!

MIND THE GAP

The macro forces, while exciting and real possibilities, can feel out of step with how many Australians experience mobility and movement day to day.

While nearly

8 in 10

Australians recognise that mobility options influence life decisions (like where they live or study)

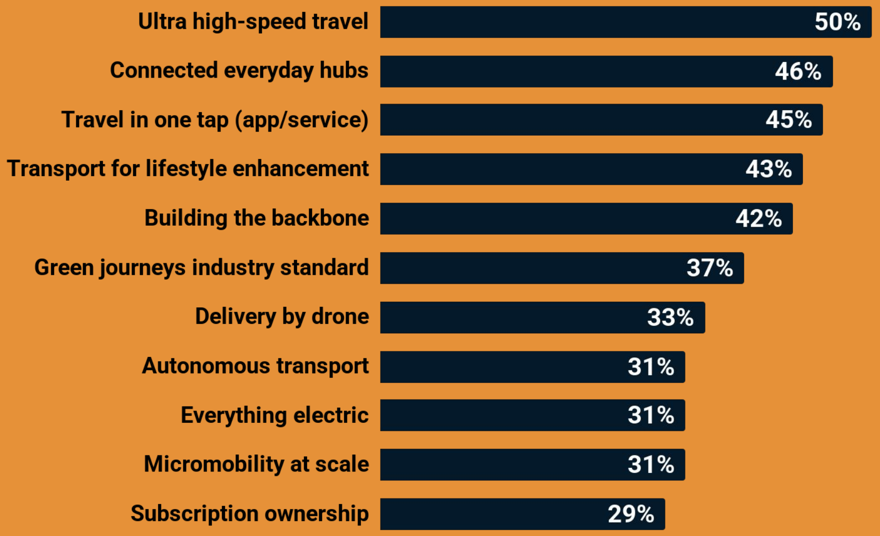
... only

1 in 3

say they are excited for new transport technology and innovation.

At most, only half of Aussies are excited by examples of emerging mobility solutions.

% positivity towards transport/mobility ideas and innovations:



Australians' confidence in what mobility could become is shaped by how getting around works today.

People's belief in, and support for, future mobility isn't driven by how compelling the vision is, but by whether it can convincingly address the real, everyday expectations people have of getting around.

For many, everyday mobility and transport feels inconsistent or unresolved, creating a credibility gap between the lived experience and future-facing ideas. Even ideas framed as exciting, ambitious, or meaningful improvements can feel too disconnected from reality - running ahead of what people need mobility to reliably deliver in the present and near term, let alone the future.

As a result, marketers and decision makers must understand the collision of the macro forces reshaping mobility with the human needs driving Australians' everyday experiences and choices today.

PART II:
MOBILITY NEEDS OF AUSTRALIANS TODAY AND TOMORROW.

THE FUNDAMENTAL MOBILITY DRIVER IS

FREEDOM.

At its heart, "getting around" is about granting independence, self-reliance, and agency over life.

The thought of losing that freedom, whether momentarily, temporarily, or longer term, leads to intense feelings of being trapped, anxious, and powerless.

This freedom sits beneath every need Australians express (they don’t want to be a burden on others, they don't want to be disadvantaged, they don't want it to be harder or more expensive) and it means that all the decisions, expenditure and time are all about ensuring they can maximise that freedom.

8 in 10

Australians acknowledge how they get around plays a role in who they are and how they live their lives.


“Thinking about all of this has made me realise that for me, transport is a constant balancing act between freedom and stress”
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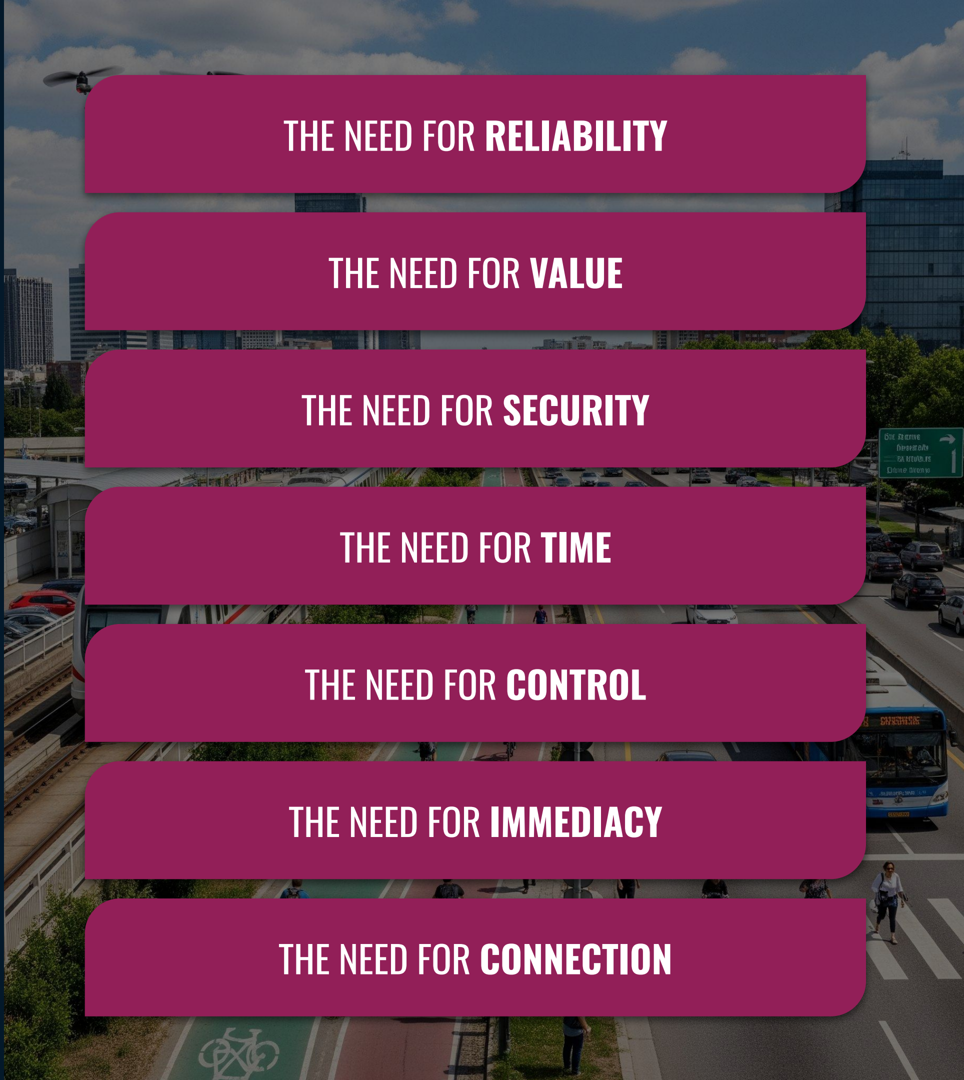
The seven human needs underpinning decision making.

The micro needs reflect how Australians are navigating, interpreting and responding to change in their day to day reality, highlighting the emotional, practical and behavioural priorities that will determine how mobility evolves in real life (in the face of the forces).

Each of the seven needs reflects a different dimension of what makes that freedom possible in everyday life.



- THE NEED FOR **RELIABILITY**
- THE NEED FOR **VALUE**
- THE NEED FOR **SECURITY**
- THE NEED FOR **TIME**
- THE NEED FOR **CONTROL**
- THE NEED FOR **IMMEDIACY**
- THE NEED FOR **CONNECTION**

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THE NEED FOR RELIABILITY.

MOBILITY JUST HAS TO WORK FOR EVERYONE ALL THE TIME.

The Human Need: Australians expect a core transport system (whether private, public, or shared), that is dependable and predictable, punctual and functional.

Central Pain Point: Whether real or anticipated (some even say inevitable) transport delays or cancellations, maintenance issues and infrastructure failures all trigger stress, frustration and a sense of powerlessness. It's why many Australians now define the "ideal" as simply something that works, not something new or different.

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2 in 5

don't agree that Australia's transport system is reliable and they can trust it.

Those who feel this the most:

- Women (44%, ix112)
- Younger Australians (44%/ix111 of Gen Z)
- Those with physical accessibility concerns (46%/ix118)

In their own words...

"The worst is public transport. It's unreliable, unpredictable and depending on the area or the town can be quite unsafe to use"

"Because my days are so busy and packed I can't afford to have delays and breakdowns, because it will have a domino effect"

"I feel extremely frustrated if there is a disruption particularly with public transport, I would be late for meetings, stressed, have to pay more for driving and parking, and have less time in my day to cook and workout and keep healthy"

"I feel like I've developed a lot of resilience and real world connection through my use of public transport"

Consistency gaps left unaddressed have real potential to stall excitement and slow progress around new solutions

Force 1: CONNECTED INTELLIGENT SYSTEMS

Australians already value real-time tools (e.g. TripView, LiveTraffic) that keep them informed and in control.

However the systems behind these aren't always aligned, with gaps in integration and accuracy, as well as a lack of trust in the transport network limiting how effective connected systems can be.

Operators and tech partners need to prove not just accuracy in data, but reliability in the network itself.

Force 4: FROM OWNERSHIP TO ACCESS

There is a lingering sense of personal value (status, success, control) attached to vehicle ownership, as well as the belief that vehicles remain the most dependable way to get around.

New access models and mobility providers will need to demonstrate consistent reliability and availability, reassuring people they won't lose the security or status they associate with having a car.

Force 5: EXPANSION OF MOVEMENT

Many can see the potential for micro-mobility and shared services, but still see more barriers and unknowns vs benefits.

Overcoming hesitancy requires proven:

- **Reliability** - saving people hassle, time and visibly relieving pressure on transport systems.
- **Safety** - requiring clear rules, enforcement and coordination of local governments, operators and community voices.

THE NEED FOR VALUE.

THE COST OF GETTING AROUND FEELS INCREASINGLY UNFAIR.

The Human Need: Australians seek accessible affordable transport options that make them feel they aren't locked out (or locked at home!), that their investment is worthwhile.

Central Pain Point: Cost is a primary source of stress, with transport adding to an already pressured household budget and economy, and leaving some feeling forced to make compromises about how and when they get around, feeling exacerbated by perceived infrastructure and network reliability issues.

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52%

agree the costs associated with getting around make them worry about being able to afford it.

Those who feel this the most:

- Younger Australians (62% of Gen Z)
- Those planning to purchasing a car (57%)
- Those who don't drive themselves (57%)
- ... but it's felt across all income and employment status.

In their own words...

"It's cheaper for me to drive and park than to take the train - how does that make sense?"

"We've cut back on going out because it's not the outing, it's the tolls and parking that sting."

"I'd love to be greener but I can't afford an EV or higher public transport fares."

"You shouldn't have to budget to visit family."

"Transport can be costly which can be a barrier for some people who cannot afford transport"

In the current economic context, financial burdens mean new mobility movements can feel far out of reach

Force 3: THE NEW ECONOMICS OF MOVEMENT

Australians are actively seeking new and cheaper solutions - with many already feeling stretched by the costs of essential travel (e.g. family, work), let alone when they feel a need to make transport trade-offs for entertainment, enjoyment, or health.

Any new mobility ask tied to investment will need to clearly demonstrate tangible, everyday value for Australian commuters bottom line.

Force 4: FROM OWNERSHIP TO ACCESS

The idea of flexibility can be enticing, however willingness to adopt new modes is low, as only 29% are positive around subscription ownership. This is tempered by an uncertain value proposition of unproven ROI and feeling forced out of ownership agency.

Overcoming these barriers means reinforcing tangible value, preserving people's sense of choice and control.

Force 2: THE A RACE TO (NET) ZERO

For many Australians, the financial costs associated with 'progress' can feel out of reach, regardless of their level of interest or desire to embrace green or new technological transport options. The noted rate of technological change is also challenging their willingness to invest now.

Emergent solutions must make sustainable progress feel attainable financially, practically, and emotionally.

THE NEED FOR SECURITY.

EVERY JOURNEY SHOULD BE SAFE AND RESPECTFUL.

The Human Need: People expect their journeys to be safe, accessible and dignified, and for this to be a basic guarantee no matter the mode or moment.

Central Pain Point: Feeling uncomfortable and/or unsafe forces many (especially elderly, women, families and solo travellers) to avoid certain transport options, certain times and places - meaning they have to spend more for alternatives or not get around at all.

43%

sometimes feel unsafe or uncomfortable when using public or shared transport

Those who feel this the most:

- Women (48%/ix112) and Younger Australians (58%/ix135 of Gen Z)
- Families with kids (50%/ix117)
- Rideshare users (52%/ix120)

In their own words...

"I realised small comforts matter like weather protection, safe crossings, and pleasant waiting areas change whether I walk or drive"

"The worst form of transport currently would be bus services, I find them to be very unsafe with a family, and not very reliable"

"For me it's still about accessibility and that still has quite a way to go as people don't even think about the steepness of the ramps or if there is a step whereas I have to know that to know if I can get somewhere"

"At more rural train stations, which are in low socio-economic areas with higher crime rates, I feel unsafe there at night"

Explicit protections and benefits are crucial to elevate the experience

Force 6: MOBILITY AS EXPERIENCE

In contrast to the idea of travel and transport as an elevated lifestyle enabler, may Australians describe a often a negative experience, plagued by delays, crowds, noise and uncleanliness.

The focus must be on formal strategies that prioritise removing the friction first and layer experience on top.

Force 5: EXPANSION OF MOVEMENT (AUTONOMOUS FLEETS)

While efficiency potential is understood, concerns remain around safety and assistance without human 'protection' (e.g. train guards, taxi drivers), while some have a concern for job-losses.

Autonomous solutions must build confidence through clear standards and accessible support that preserves the feeling of being looked after.

Force 5: EXPANSION OF MOVEMENT (MICROMOBILITY)

Australians seem to have a heightened awareness and overriding impression of the dangers and misuse surrounding eBikes and eScooters, limiting uptake.

To help shift perceptions, commit to safer designs, better infrastructure and clear enforced rules.

Force 2: THE A RACE TO (NET) ZERO

A move toward green electric and low-emission travel appeals as a way to create calmer, cleaner spaces where people can breathe easy and feel safe while on the move.

To unlock this appeal, lean into sustainability as an experience and comfort upgrade as well as an environmental one.

THE NEED FOR TIME.
MOBILITY CAN CREATE OR ENABLE SPACE.

The Human Need: People see transport as resource to be optimised, not wasted. They seek journeys that are either, or ideally even both:

- Quick and predictable - getting them where they're going efficiently to maximise time there and not in transit.
- Purposeful - where they can utilise the travel time to decompress, catch-up, be productive, depending on what they want or need.

Central Pain Point: Getting around is cited as one of the more stressful parts of the day amplifying pressure, rather than offering relief or adding value to their time.

61%

prioritise speed and efficiency when choosing options.

69%

also try to enjoy the time spent travelling, as it can be valuable 'me-time'.

Those who feel this the most:

- Millennials (71%/ix115), Families (71%/ix116) and White collar professionals more likely to prioritise speed (78%/ix115)
- Those with families also over-index towards me-time value (74%/ix108)
- Public transport users (74%/ix108) are also more likely to try to enjoy the travel time

In their own words...

"If I can get a seat and time the bus right it can be manageable, and I will listen to a podcast or music and play some NYT game"

"Getting around allows me to spend some time to myself and listen to my favourite podcasts, music and catch up with friends on hands free calls"

"I noticed my travel choices are far more pragmatic than ideological, I pick the option that's quickest and least stressful, even if it's not the most sustainable. Convenience and reliability win out"

New access models won't scale until they match the time value of the modes people already rely on today

Force 6: MOBILITY AS EXPERIENCE

The shift toward more experiential and lifestyle oriented mobility aligns strongly with people's desire for purposeful time. But this only works when the basics are met, and few feel they are in reality.

Ensure the journey always feels like time well spent, not time lost, with useful and accessible amenities (e.g. comfortable seats, wi-fi).

Force 1: CONNECTED AND INTELLIGENT SYSTEMS

Integrated systems appeal to people's desire for better time, as they can cut planning stress and wasted minutes.

Position and use intelligent tools to remove planning friction and give people back control, via key features like: real-time updates, smart route suggestions, seamless transfers, and digital ticketing.

Force 4: OWNERSHIP TO ACCESS

People protect their personal time and space, and a car still offers them that privacy, comfort, control and flexibility - hence they are unwilling to convert to alternatives.

Shared or on-demand options must match or meaningfully compensate for time efficiency while personal vehicles can dial up that advantage even further.

Force 7: EVOLVING PATTERNS OF PLACE

As work, services and social life move closer to home (or online), many people travel less. When they do travel, they expect it to feel worthwhile.

Recalibrate your product and network/infrastructure planning to align with how people are really living, adapting the modes, frequency and willingness to spend.

THE NEED FOR CONTROL.
THE ABILITY TO DECIDE, DIVERT, OR ADAPT.

The Human Need: People seek the ability to actively choose the mode, route, timing and investment that best suits the moment - and crucially for it not involve any compromise or penalty on their part.

Central Pain Point: A lack of clear, accurate, and timely information coupled with doubts about whether the options are actually able to deliver, leaves many Australians feeling powerless. Uncertainty, not just inconvenience, undermines trust and amplifies frustration.

8 in 10

say it's important to have clear information and options so they can choose how to get around

Those who feel this the most:

- A universal value across audience demographics
- More critical to current Public transport users (87%/ix110), and those expecting to travel more on PT (90%/ix113)

In their own words...

"Looking ahead, I want systems that reduce cognitive load like integrated planning tools, seamless fares, and last-mile options"

"The thought of having smarter, faster, more connected systems is exciting too where you don't have to juggle different apps or timetables, but everything works together seamlessly"

"As a commuter, I learned I need predictability and clear information more than fancy features, like real time updates, simple ticketing, and reliable timetables make me choose public transport more often"

"Brands and manufacturers need to share information better, providing safety information and having age restrictions on things"

New mobility promises Australians more agency, however there is work to be done to prove it to them

Force 1: CONNECTED INTELLIGENT SYSTEMS

The ability to leverage technology as a decision making input has strong alignment with the consumer need for greater mobility control - assuming they have access and ability to use them

Any network or transport option must provide accurate, accessible, real-time information across multiple channels so everyone can plan, adapt and stay in control of their journey.

Force 4: FROM OWNERSHIP TO ACCESS

Car ownership preferences endure because it guarantees full agency over timing, aesthetic, comfort and personal space. Even if it may come at a higher cost, people are reluctant to give up that autonomy and independence for access-based alternatives.

Any new access-based models must preserve the sense of ownership and decision-making control people currently associated with their own car.

Force 5: THE EXPANSION OF MOVEMENT

Emerging micro and autonomous mobility options offer the ultimate flexibility and choice to people without being locked in to set ownership, financial outlay, or timetables set by others.

Elevate and strengthen the sense of control these modes provide by making it clear how they work, when they're available and what people can expect, so users feel they are fully in charge of their mobility moments.

THE NEED FOR IMMEDIACY.
FIXING TODAY BEFORE BUILDING TOMORROW.

The human Need: Australians demand the essential provision, repair and maintenance of the vast transport networks already in play, over and above commencement of large and abstract future projects and promises.

Critical Pain Point: Failures of the system and perceived band-aid solutions, are not just interrupting how people get around but undermining trust. Frustrations feel unheard, while government promises and taxes are perceived to be focussed on big flashy projects that don't fix everyday problems.

67%

believe we should focus on improving the transport services and infrastructure we have today, rather than on futuristic new projects

Those who feel this the most:

- Almost universally resonant, with a slight skew to older Australians (73%/ix109 Boomer generation)
- More important to those intending on buying a car (76%/ix114) or eBike/Scooter (74%/ix111)
- Only 17% believe Australia is investing enough in the infrastructure needed for the future

In their own words…

"I have never really considered how we will be getting around in the future but rather focus on the challenges today"

"I think the entire national conversation about transport is focused on the wrong things. The real revolution won't come from another multi-billion dollar project. It will come from smarter, more flexible, and more equitable systems"

"The engineers and scientists may come up with excellent, futuristic ideas but, that can only be turned into a reality if they are properly funded/supported"

"We need connectivity - review timetables for common routes and ensure that wait times between switching modes of transport are minimised"

Australians want today's networks repaired before tomorrow's projects begin

Force 1: CONNECTED INTELLIGENT SYSTEMS

While more integrated networks appeal and meet the immediacy need, people consistently describe a gap between the promise of smarter systems and their day-to-day reality.

Invest in strengthening and integrating the systems Australians have today before layering on and promising new capabilities.

Force 2: THE A RACE TO (NET) ZERO

People acknowledge the importance and welcome greener solutions when they *also* fix the basics and avoid adding cost or complexity to their commute.

Embed green upgrades within broader network, product and infrastructure improvements that service quality and reliability - and not as standalone or symbolic changes.

Force 5: THE EXPANSION OF MOVEMENT (AUTONOMOUS)

Autonomous mobility can feel premature, given many see a system fraught with issues undermining trust. Yet it also promising if it can reduce problems caused by understaffing, industrial action, and issue detection.

Ensure any autonomous and AI-driven solutions clearly solve today's problems rather than add something else new and unproven.

Force 3: THE NEW ECONOMICS OF MOVEMENT

Australians feel they already pay significant costs to get around, and these are constantly increasing. Yet they perceive declining levels of service and support.

To mitigate frustrations, make essential improvements and investments in ways that don't add to people's existing cost of living strain.

THE NEED FOR CONNECTION.
BELONGING, INTERACTION AND IDENTITY.

The Human Need: Australians see mobility as a gateway to connection, specifically to people, places, opportunity and ultimately identity. Getting around isn't just functional; it's about staying linked to what (and who) gives our lives meaning.

Critical Pain Point: When mobility is restricted (e.g. by needs like cost, distance, safety, accessibility), people feel cut off not just physically but emotionally and socially. This erodes community connection and fuels inequity.

68%

agree being able to get around means they can feel part of society and to connect to the people and places they care about

Those who feel this the most:

- Families with younger children (79%/ix116)
- Professionals (81%/ix116)
- Those planning to purchase a car (81%/ix119) or eBike/Scooter (80%/ix118)
- Aussies optimistic about the future (80%/118ix)

In their own words...

"Getting people off their mobile phones and using active transport like walking, cycling, and even water-based commuting could support physical and mental health and community connection, while reducing emissions"

"Getting around gives me freedom, connection, control and the ability to be present for my family and community"

"I enjoy the freedom of driving my car - being able to easily visit my family and friends"

Mobility is how Australians connect to who/what matters today, and as life reshapes around them tomorrow

Force 6: MOBILITY AS EXPERIENCE

People increasingly see mobility as part of their social and emotional wellbeing, whether it's travelling with loved ones, to meet up with people, or using journey time to reconnect. However in reality it's not always pleasant or easy.

Design journeys that support social connection and emotional wellbeing, not just movement from A to B.

Force 2: CONNECTED AND INTELLIGENT SYSTEMS

Australians are attracted to the idea of better digital integration to help them find places, coordinate plans and move easily between the moments and people that matter.

Design intelligent systems to help people to connect more easily with tools like shared ETAs, clear meet-points, real-time alerts and simple multi-mode planning.

Force 7: EVOLVING PATTERNS OF PLACE

As home, work and social hubs shift inward (especially digitally), people note that staying physically connected to each other, their communities and environment is increasingly important.

Keep people connected beyond their local area by ensuring direct, reliable links to major social and community destinations.

Force 3: THE NEW ECONOMICS OF MOVEMENT

Unfortunately for some Australians, travel cost and affordability can and do get in the way of staying connected. This means trade-offs about when, where and how they can maintain social ties.

Help provide ways to make connection more consistently achievable such as through family or group-friendly pricing, bundled access and cost-conscious options.

What this means for growth...

If nothing else... the 5 key takeaways for growth

Foundations first.

Australians won't buy into future mobility until present day systems are dependable, visible and affordable. Every player must consistently show commitment and real progress Australians can see, feel, and trust in their daily lives before asking them to get excited about future possibilities.

Invest in connectivity, not complexity.

Australians want joined-up journeys, not disparate apps, opinions and rules. Growth will come from making mobility data, services and systems consistent, simplifying access to information, payment and services so people can plan and move with confidence.

Anchor progress in lived benefit.

The mobility transition must deliver genuine gains, balancing environmental and economic progress with guaranteed direct personal gains, such as safer travel, reduced cost, and confidence in range and reliability, in order to achieve broad and lasting adoption (and not feel performative or imposed).

Empower choice, don't overwhelm it.

Flexibility is a value driver; too many fragmented options become friction. Growth will come from clear information, seamless interoperability and fewer hoops for consumers to jump through.

Remember - mobility is more than movement.

In a country and a world so vast, Australians are seeking freedom to explore, to participate and to connect - on their own terms, in ways that support their wellbeing and sense of belonging.

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Manufacturers & Marketers

Sell the whole experience beyond "just the car" (or bike, etc). Reinforce familiar convenience and elevate messaging around seamless ecosystems, critical maintenance, insurance, interconnectivity that deliver value and give certainty and control to consumers.

For Government & Policy

Prioritise operational excellence. Lean in to reliability needs by addressing (whether repairing, removing, replacing) what already exists, proving trust in the system before announcing the next decade's vision and commitment.

Media (Inform & Advocacy)

Champion reliability and fairness as national priorities. Help the public better understand policy and see transport investment as critical infrastructure, not just spend or band-aid solutions.

THE growth DISTILLERY

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Manufacturers & Marketers

Balance innovation with reassurance. Australians are curious about new technologies like automation and AI, but wary of losing control. Position new tech as enhancing driver confidence, not replacing it.

For Government & Policy

Ensure new foundations are designed for longevity. Invest in infrastructure, data and systems that are built for sustained use and future evolution, not short-term or perceived short-sighted fixes.

Media (Inform & Advocacy)

Always link the future to the everyday. Translate big mobility narratives (such as EV transition, AI, automation, emergent brands and features) into what it means for household budgets, safety, and accessibility

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Manufacturers & Marketers

Keep a firm focus on the user and their values and needs. Safety, comfort and confidence matter just as much as cool innovation. EVs and alternative fuels are only as strong as the network that supports them. Growth relies on visible benefit and guaranteed convenience parity or better than what they have today.

For Government & Policy

Policy needs to follow behaviour, not the other way around. Australians are already moving differently in line with how we live. Policy must visibly and agilely adapt to these shifts with ongoing community consultation and responsive planning frameworks.

Media (Inform & Advocacy)

Consistently surface and campaign for the human impact. Spotlight stories where mobility (and mobility shifts) truly has an impact how people live, such as connected families, enabling inclusion, reducing isolation (e.g. regional areas).

Empower choice, don't overwhelm it.

Flexibility is a value driver, and too many fragmented options become friction. Growth will come from clear information, seamless interoperability and fewer hoops for consumers to jump through.

Manufacturers & Marketers

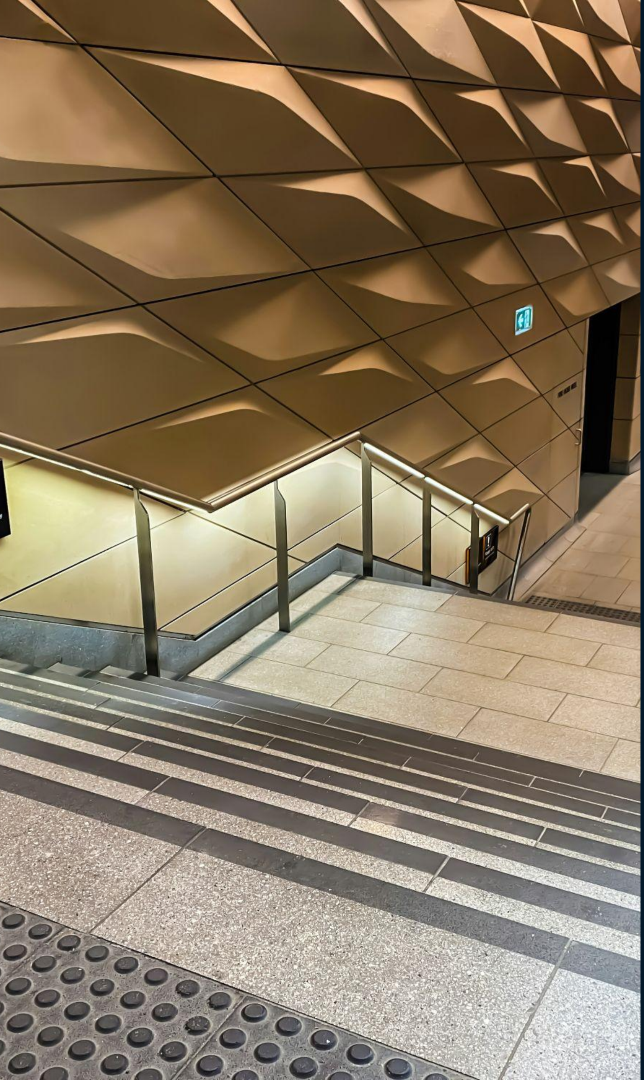
Make value (more) tangible. With COL top of mind and a raft of new (cheaper) options, it is crucial to talk of ‘brand’ and ‘ownership’ in terms of investments worth making. Talk to the experience, value-adds, durability, and flexibility (e.g. subscriptions, shared access, micromobility).

For Government & Policy

Define time and enjoyment as policy metrics and success outcomes. Build and measure Australia’s infrastructure in ways that people truly value - the time saved, money well spent, flexibility gained, and well being improved.

Media (Inform & Advocacy)

Balance critique with clarity. Educate audiences on how new mobility options really work and the role these can play to build informed confidence, not hype or fear. Australians need reassurance that new mobility is on their side (e.g. charging networks, data systems, pricing models, micromobility).



Mobility is more than movement

In a country and a world so vast, Australians are seeking freedom to explore, to participate and to connect - on their own terms, in ways that support their wellbeing and sense of belonging.

Manufacturers & Marketers

The strongest growth will come from services, features and vehicles that enable people to positively connect during and after their journey, not just commute.

For Government & Policy

Modern mobility must benefit all Australians. Investment and policy should enhance access, affordability, and safety nationwide, across all areas, abilities and needs.

Strengthen safety with clear rules, visible enforcement, and consistent national standards that reflect current mobility realities.

Media (Inform & Advocacy)

Spotlight the critical issues. Inform and campaign for people, places and systems that need to be addressed, and push for meaningful change whether it's about public awareness, driving the political agenda, or advocating for action.

THE FORCES SHAPING

MOBILITY

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