

# ITS AMERICA

## *Sizing the Intelligent Transportation Industry*



Intelligent Transportation Society of America

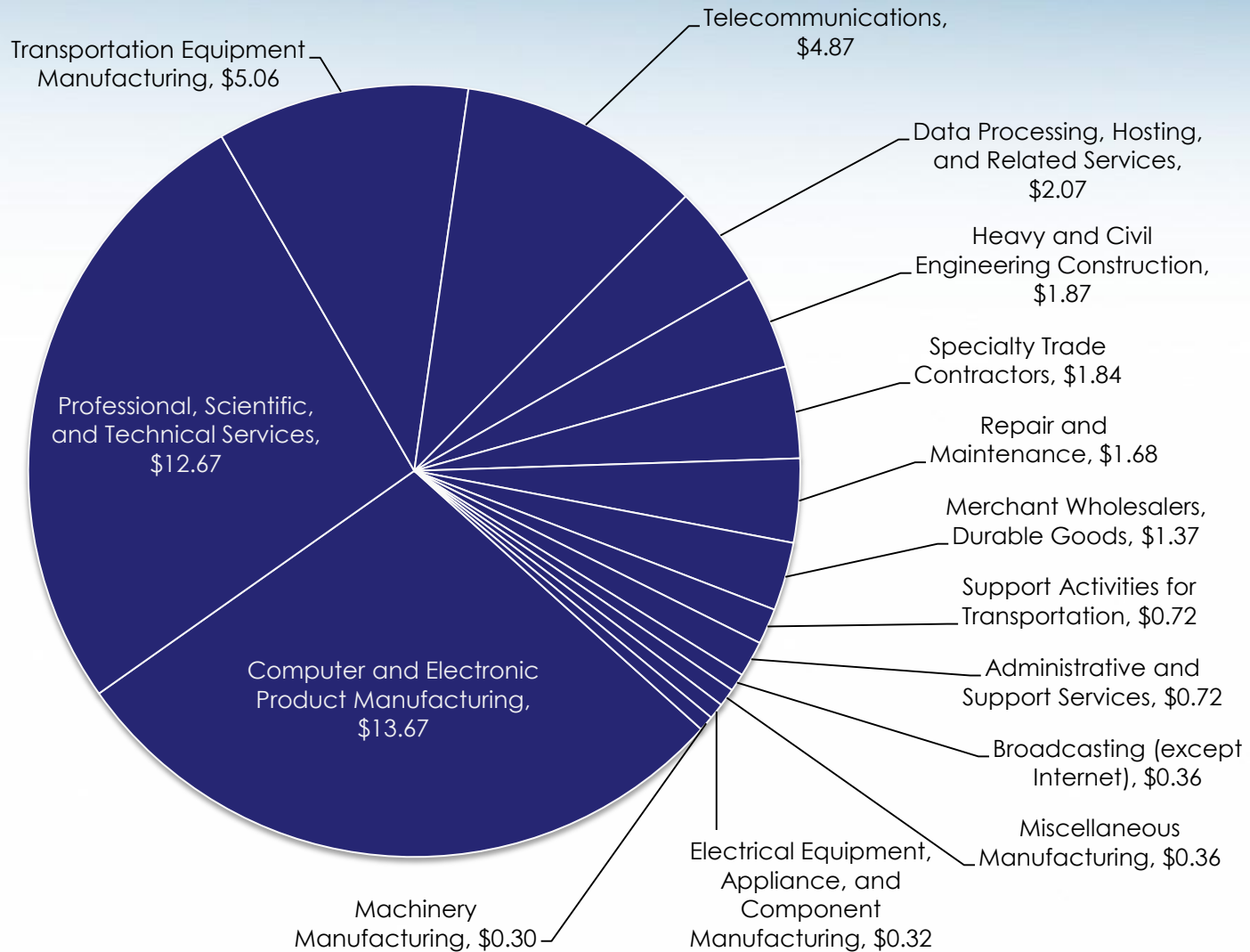
IHS Global Insight

August 2011



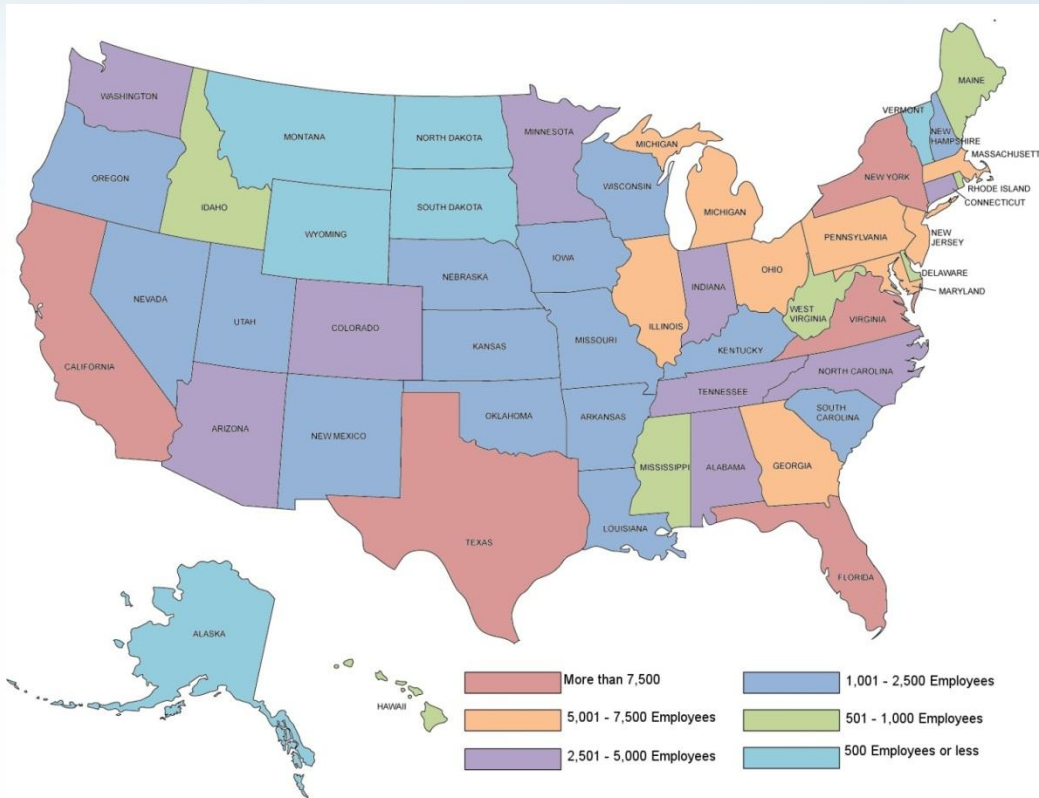


## U.S. ITS Market is \$48 Billion





## U.S. ITS Employment is 180,000

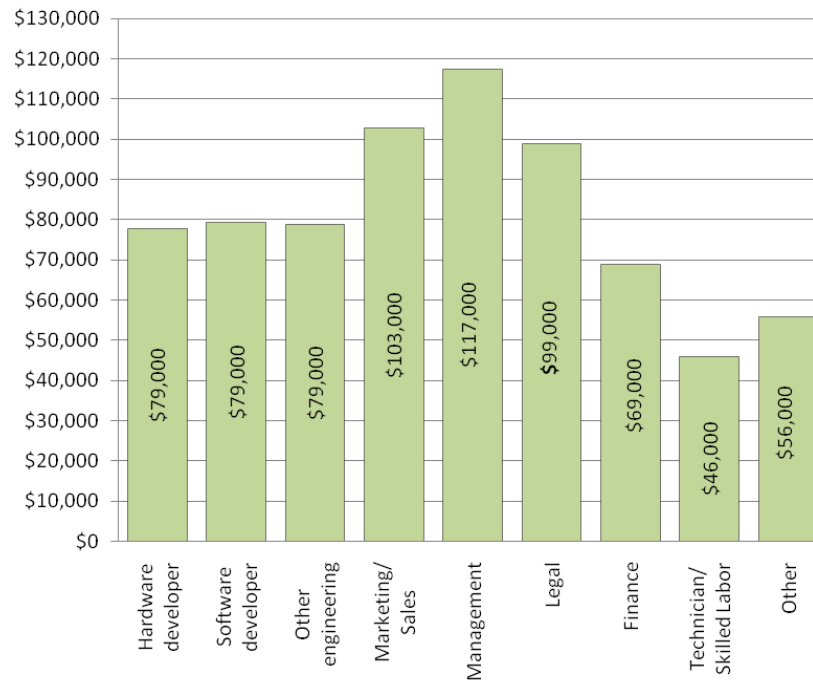


- **445,000**  
U.S. total jobs in the value chain
- **3,600 to 6,400**  
Jobs added each year to U.S. ITS end-use industry through 2015



## ITS Jobs Pay Well

- ITS companies reported a 2009 annual average salary of almost \$75,000



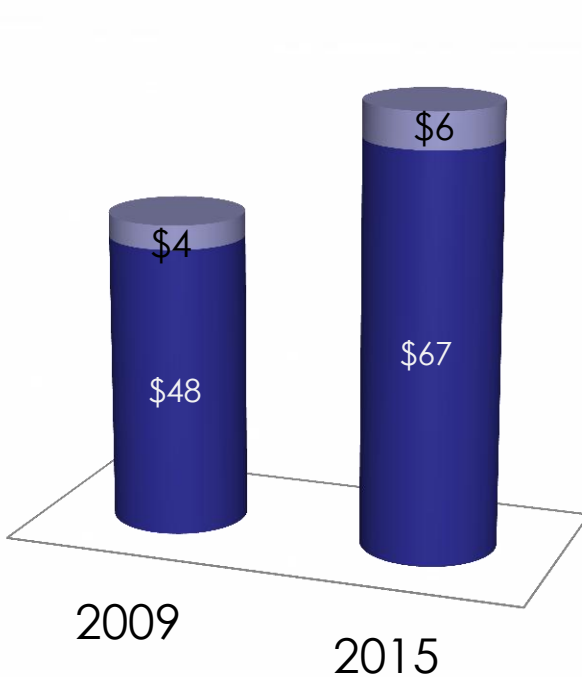




## Intelligent Transportation is a Growing Industry

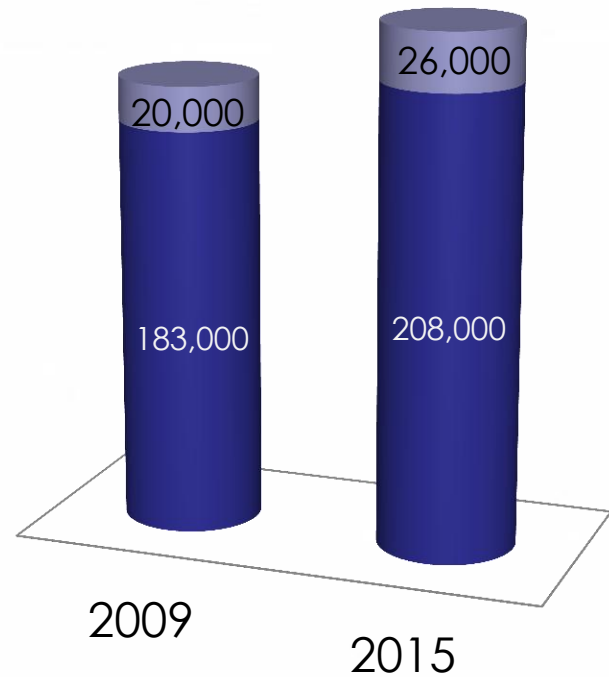
ITS End-use Revenue  
(Billion)

- Rest of North America
- US



ITS End-use Employment

- Rest of North America





## Top Ten ITS States

Total ITS End-use Revenue by State (Billions)

Rank	State	2009	2015
1	California	5.59	7.73
2	Texas	3.81	5.52
3	Virginia	2.41	3.47
4	Florida	2.03	2.82
5	New York	2.2	2.75
6	Michigan	1.8	2.92
7	Illinois	1.75	2.51
8	Pennsylvania	1.63	2.27
9	New Jersey	1.54	2.05
10	Ohio	1.68	2.32



## Top Ten ITS States

ITS Employment by State

Rank	State	2009	2015
1	California	54,330	60,168
2	Texas	33,919	37,185
3	Virginia	27,242	31,230
4	Florida	21,974	25,224
5	New York	19,948	22,226
6	New Jersey	16,793	18,888
7	Maryland	16,753	17,958
8	Massachusetts	16,716	18,033
9	Pennsylvania	16,698	19,029
10	Illinois	16,254	18,647



## *ITS Industry is Innovative*

- **While overall patent applications in the U.S. were static, ITS applications grew 17 percent**
- **Patent Classes Relevant to ITS include:**
  - Motor vehicles
  - Electricity: motive power systems
  - Communications: electrical
  - Data processing: vehicles, navigation, and relative location
- **73 percent of ITS revenues in the U.S. attributable to companies with fewer than 500 employees**





## *Backup Slides*



## Study Methodology

ITS America  
Survey Data

IHS Global Insight Data

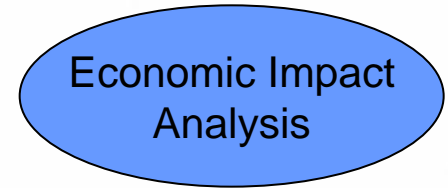
Firmographic  
Database



- Rest of North America
- Motor Vehicle Industry



Econometric models to estimate  
ITS market size (revenue) and employment





## Survey Summary

	Number of Companies
Initial list of potential ITS companies	15,000
ITS companies identified following initial review	8,976
ITS companies matched to firmographics data	3,799
ITS companies matched to ITS Architecture and identified 86 NAICS codes (6-digit)	2,998
	Revenue
Total Revenue of Identified 2,998 ITS Companies (representing 188,000 physical locations)	\$1,706 Billion
Revenue from their 40,400 "ITS Locations"	\$855 Billion (50%)
Attributable end-use ITS revenue from these locations	\$48 Billion (<3%)



## ITS Architecture Products & Services

### Traffic Management Market Sector - ITS examples:

1. Freeway & Arterial management systems
2. Active Traffic Management Systems
3. Traffic Decision Support & Demand Management Systems
4. Traffic Management Roadside Hardware / Software
5. Traffic Incident Management Equipment / Systems
6. Roadway Weather Information Systems (RWIS)
7. Traffic Detectors / Surveillance Equipment
8. Traffic Probes
9. Signaling and Control Devices
10. Intersection Cabinet Safety Devices / Components
11. Battery Backup / Uninterruptible Power Supply systems
12. Roadway Closure Equipment / Systems
13. Dynamic Message Signs (DMS)
14. Electronic Toll Collection Equipment / Systems
15. Electrical Lighting & Management Systems
16. Drawbridge Management
17. Emissions Monitoring Equipment / Systems
18. Speed Monitoring Equipment / Systems
19. Variable Speed Controls
20. HOV Lane Management Equipment
21. Mainline Lane Controls
22. Reversible Lane Management Equipment / Systems
23. Metering
24. Regional Parking Management Equipment / Systems
25. Parking Facility Management Equipment / Systems
26. Asset Management Systems

### Cross-Cutting & Other ITS Sector - ITS examples:

1. Communications
2. Systems Integration
3. Systems Engineering

### Archived Data Management Sector - ITS examples:

1. ITS Data Collection & Management
2. ITS Data Warehouses

### Public Transportation Market Sector - ITS examples:

1. ITS Archived Data / Business Intelligence Systems
2. Voice / Data Communications Systems
3. Computer-Assisted Dispatch (CAD) Systems
4. Automatic Vehicle Location (AVL) System for Buses
5. Automated Train Location System (ATLS) for Rail Transit
6. Transit Signal Priority (TSP) Systems
7. Connection Protection / Notification Systems
8. Positive Train Control
9. Automated Vehicle Monitoring (AVM)
10. Automatic Passenger Counting (APC) System
11. Transit Travel Information (TTI) Systems
12. Advanced Fare Collection / Electronic Payment Systems
13. Security Systems
14. Demand-Responsive Transit

### Commercial Vehicle Operations Sector - ITS examples:

1. Back Room Systems
2. Driver Management Systems
3. Driver Communication Systems
4. Vehicle Monitoring & Management Systems
5. Cargo Management Systems
6. Safety Management Systems
7. Driver Credentialing Systems
8. Other Systems and Technologies

### Vehicle Safety Market Sector - ITS examples:

1. Automated Vehicle Systems
2. Cooperative Vehicle Safety Systems
3. Vehicle Safety Monitoring and Assistance Systems
4. Driver Safety Monitoring Equipment/Systems
5. Operator Assistance Systems
6. Collision Notification Systems

### Emergency Management Market Sector - ITS examples:

1. Early Warning System Alert & Advisory Systems
2. Emergency Call-Taking & Dispatch Services
3. Emergency Routing Equipment Systems
4. Emergency Signal Preemption
5. Transportation Infrastructure Protection Systems
6. Roadway Service Patrols
7. Mayday & Alarms Support Systems/Equipment
8. Wide-Area Alert Systems
9. Disaster Response & Recovery Equipment / Systems
10. Disaster Traveler Information Systems / Software
11. Evacuation & Reentry Management Systems / Software
12. Telemedicine Applications / Systems

### Maintenance & Construction Mgmt - ITS examples:

1. Vehicle & Equipment Tracking Systems
2. Environmental / Meteorological Sensors, including Clarus
3. Hazard detection / updating / advisories
4. Monitors, forecasts, schedules, manages activities
5. Scheduling, coordination / on-board sensors, diagnostic
6. CCTV traffic monitoring & control / DMS / ISP / HAR
7. Rain / sun sensors, vehicle monitoring, probe data
8. Fixed & vehicle-based sensors / probe monitoring

### Traveler Information Market Sector - ITS examples:

1. Vehicle Telematics
2. Transportation Data for Vehicle Operators
3. Vehicle-to-Vehicle Traveler Information
4. Broadcast Traveler Information
5. Interactive Traveler Information
6. ISP Based Trip Planning and Route Guidance
7. Autonomous Route Guidance
8. Dynamic Route Guidance
9. Dynamic In-Vehicle Signing
10. Static In-Vehicle Signing
11. Yellow Pages and Reservations Services



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