Who Will Shape & Govern New Mobility Services?

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Governance of Metropolitan Transport Systems

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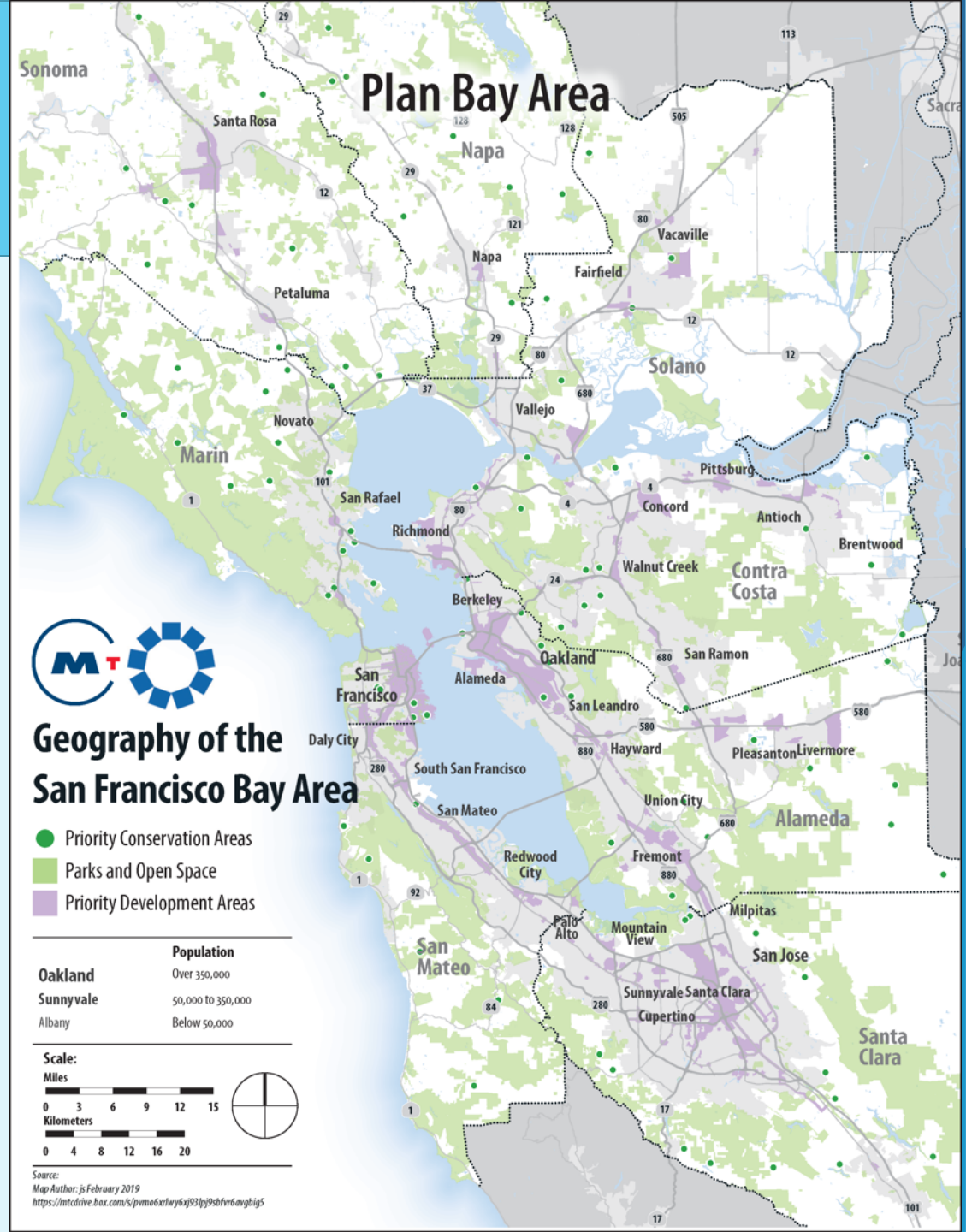
San Francisco Bay Area

- 9 counties, 101 cities
- 20+ transit operators
- 7+ M people and growing
- Urban, suburban, and rural
- Mode share: 64% drive alone, 12% transit,10% rideshare, 7% work from home, 4% walking, 1% biking.
- MTC
  - Required by state law to adopt rules/regs to promote regional transit coordination, recommend consolidation
- Home to many new mobility companies!



Regional Mobility Services Experience

511 Bay Area Traveler Information

13.7M

MONTHLY DATA REQUESTS

511 SF Bay

57K

TWITTER FOLLOWERS

308K

MONTHLY PHONE CALLS

467K

MONTHLY WEB USER SESSIONS

Bay Area FasTrak: Electronic Tolling

8

BRIDGES

$53M

MONTHLY REVENUE

4.1M

TAGS IN CIRCULATION

8.9M

MONTHLY TOLL TRANSACTIONS

4

EXPRESS LANES + SFO

4.2/5

SATISFIED WITH CUSTOMER SERVICE

Clipper Smart Card Fare Payment

$55M
MONTHLY TRANSIT OPERATOR REVENUE

15,000
PIECES OF EQUIPMENT

22
TRANSIT OPERATORS

23M
MONTHLY FARE PAYMENTS

97%
CUSTOMER SATISFACTION RATING

825,000
DAILY WEEKDAY TRANSACTIONS

Clipper Next Generation

New Mobility

New Mobility #1: Regional Bike Share Program

- Original agreement with MTC on behalf of five cities with Ford/Motivate
  - San Francisco, San Jose, Berkeley, Emeryville, Oakland
- Integrated with Clipper – Clipper cards unlock bikes
- Data open for public use

- Usage
  - 6,000 trips/day, 3M since June 2017
  - 50% use Clipper to access bike
  - 23% low-income

New Mobility #1: Changing Bikeshare Landscape

- Between 2017 and today, new bikeshare companies offered free bikeshare
  - Today, half have gone out of business, changed business model or left North America
- Now it's Transportation Network Companies (TNCs) in bikeshare
  - Lyft bought Motivate, Uber bought Jump.
- Bottom line: patchwork of bikeshare programs with no regional consistency

New Mobility #1: New, Local Bike Share

- Emerging concerns about exclusivity/monopoly with Regional GoBike Program
- MTC now funding programs in cities to negotiate their own agreements
- City of Fremont/Lime example of how it goes wrong
  - City was negotiating agreement with Lime
  - At last second, Lime pulled out
  - Same scenario with Walnut Creek
- Cities want consistency and reliability

New Mobility #2: Carpool Apps (Scoop, Waze)

US and California have long history of promoting ridesharing. Forming and sustaining carpools is very challenging. Mode share has hovered at ~10%.

Pros/Advantages of Carpool Apps

- New, easier ways to match
- Partnerships take advantage of private sector skills/innovation/funding
- Successful in select geographic/demographic markets
- Pays drivers to carpool

New Mobility #2: Carpool Apps – Not All Upside

Cons/Disadvantages of Carpool Apps

- Riders must pay for rides
- Fragmentation/fewer carpool matches in any single database
- Lack of full transparency about app usage
- Little usage in many parts of Bay Area, parking required
- Private-sector carpool app sustainability (or lack thereof)

New Mobility #2: Carpool Apps – Future is Uncertain

- Challenge is NOT technology, it is behavior change and a sustainable business model
- Carpooling could be a part of a solution
  - On-going challenges with child carpooling efforts
  - What's the proper role for government, employers?
  - True success requires complete high occupancy vehicle network and/or road user charging

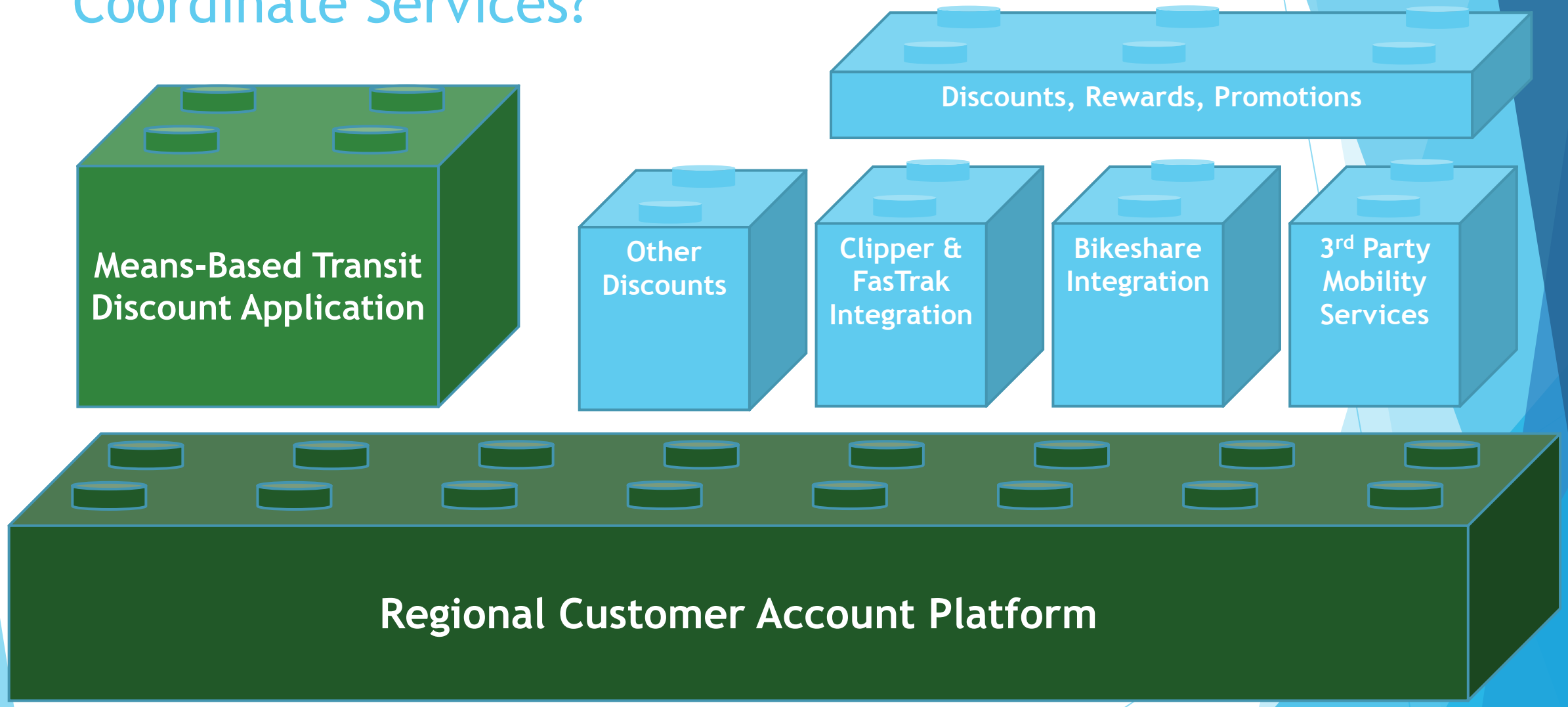
New Mobility #3: Car Share

- Gig provided 300K trips last year using fleet of 500 cars
- New agreement
  - Gig to provide Clipper cards to Gig carshare members
  - Gig to provide data
- Includes 50K trips to or from BART at stations where there are dedicated spaces for Gig

New Mobility #4: Microtransit

- Livermore-Amador Valley Transit Agency tested microtransit in one city, now expanding
  - Costs of regular service were increasing, usage was dropping
  - People perceived TNCs as higher-level service

Regional Customer Account Platform to Coordinate Services?



Potential Customer Account Platform

- Bay Area Balance
- Discounts:
  Senior, Student & Low Income

- Pool Resources
- Data Dashboard
- Settlement
- Easy Price Changes

CLIPPER

$$$ Wallet

FASTRAK

- Payment
- Integrate Multiple Services
- Incentives
  - Rewards
- Equity
  - Unbanked
- Trip/Cost/Options
- Promotions
- Subscriptions

PARKING

Ford GoBike

scoot

Lime

BIRD

Share it

UBER

Micro transit

GO DUBLIN!

MOD Mobility on Demand

Seamless Mobility

A set of tools that improves the traveler experience through an interconnected, multimodal transportation network to achieve regional goals

Status Today – Seamless Mobility

- Creating playbook to guide regional & local actions
- Transit is the core of seamless mobility
  - Coordinate fares
  - Shed unproductive service
- Deploy regional programs, fund others; support & coordinate cities
- Require LA DOT Mobility Data Standard?
- No answer to “who organizes mobility services?”

What Does the Future Hold for MTC?

- Solidify and embrace regional role delivering mobility services
- Refine regional role in coordinating transit, cities' mobility services
  - Fare coordination
  - Standard data sharing requirements
- Build on tools we already control (Clipper) & deploy regional customer account platform
- Continue to support traditional strategies
  - Focused infrastructure improvements, parking and congestion pricing

Thank you!

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Links

- www.bayareafastrak.org
- www.clippercard.com
- https://www.wheelsbus.com/godublin/
- http://www.actransit.org/flex/
- https://github.com/CityOfLosAngeles/mobility-data-specification
- MTC Perspectives Paper – Toward a Shared Future: Strategies to Manage Travel Demand https://mtc.ca.gov/sites/default/files/TDM_Perspective_092618.WEB_.pdf