Who Will Shape & Govern New Mobility Services?

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Governance of Metropolitan Transport Systems
Volvo Research & Educational Foundations - April 10, 2019
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
- **57K** Twitter Followers
- **308K** Monthly Phone Calls
- **467K** Monthly Web User Sessions
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<tr>
<th>BRIDGES</th>
<th>MONTHLY TOLL TRANSACTIONS</th>
<th>MONTHLY REVENUE</th>
<th>TAGS IN CIRCULATION</th>
<th>SATISFIED WITH CUSTOMER SERVICE</th>
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Clipper Smart Card Fare Payment

22 Transit Operators

$55M Monthly Transit Operator Revenue

23M Monthly Fare Payments

15,000 Pieces of Equipment

825,000 Daily Weekday Transactions

97% Customer Satisfaction Rating
Clipper Next Generation
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
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?

Means-Based Transit Discount Application

Discounts, Rewards, Promotions

Other Discounts

Clipper & FasTrak Integration

Bikeshare Integration

3rd Party Mobility Services

Regional Customer Account Platform
Potential Customer Account Platform

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

- Bay Area Balance
- Discounts: Senior, Student & Low Income
- Pool Resources
- Data Dashboard
- Settlement
- Easy Price Changes

CLIPPER

$$$

Wallet

FASTRAK

Micro transit

GO DUBLIN!

Ford
GoBike
scoot
Lime
BIRD
Share it
UBER

PARKING

MOD
M O B I L I T Y  O N  D E M A N D
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