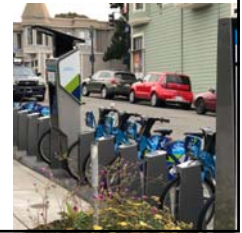




2020 County Transportation Plan

Shared Mobility/Transportation Network Companies Overview



A presentation to the Alameda CTC Planning, Policy and Legislation Committee
 Kristen Villanueva, Alameda CTC Staff
 Nate Conable, Fehr & Peers
 October 14, 2019

2020 CTP Development

Fall 2018	<ul style="list-style-type: none"> • Meetings with jurisdictions
Spring 2019	<ul style="list-style-type: none"> • Commission Retreat
Fall 2019	<ul style="list-style-type: none"> • Approval of vision and goal statement for the 2020 Countywide Transportation Plan (CTP) • Presentations on policy areas for the 2020 CTP
Winter/Spring 2020	<ul style="list-style-type: none"> • <i>Needs assessment and plan development</i>
Summer/Fall 2020	<ul style="list-style-type: none"> • <i>Draft and Final 2020 CTP</i>



Key Topic Area
Shared Mobility and Transportation Network Companies



What Is Shared Mobility?

- **Technology-enabled mobility services**
 - Transportation Network Companies (TNCs)
 - Uber
 - Lyft
 - Bike Share
 - Scooter Share



Current Shared Mobility

BIKES AND SCOOTERS

City	Status of Bike share	Status of Scooter Share
Oakland	Bike share stations	Permit Program July 2019
Berkeley	Bike share stations	Permit Program on hold
Emeryville	Bike share stations	Permit Program under development
Fremont	Dockless bike pilot	
Various	Dockless bikes (program ended in March 2019)	Occasional scooters

Current Shared Mobility

ACCESSIBLE SERVICES AND PARTNERSHIPS

- City-based partnership with TNCs
- Seven pilots for older adults and people with disabilities
 - Central County: Hayward and San Leandro
 - North County: Albany and Emeryville
 - South County: Fremont, Newark and Union City
- One program for all users
 - WHEELS Go! Dublin



Emerging Regulation for TNCs

Within California

- Only agency with authority is California Public Utilities Commission
- State legislation now enables San Francisco to vote on “congestion tax” in November

Other examples nationwide

- New York City: \$0.75-\$2.75 congestion surcharges on Taxi, Uber and Lyft trips
- Seattle: \$0.32 fee per ride and considering increasing
- Chicago: \$0.72 fee per ride

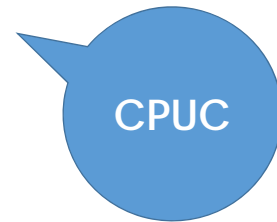


Emerging Regulation of TNCs

SB 1376 TNC ACCESS FOR ALL ACT

California legislation requires TNCs to provide services that are accessible to persons with disabilities through their online-enabled applications, with a focus on users that require a **wheelchair accessible vehicle (WAV)**.

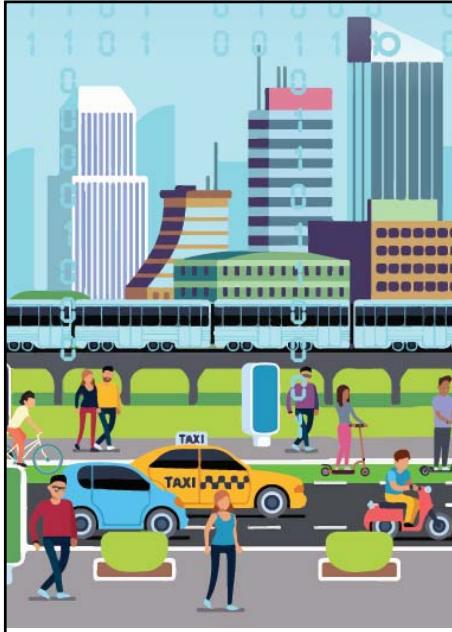
- Track 1 (Finalized)
 - Established Access Fund
 - Designated Geographic Areas
- Track 2 (Staff actively following development)
 - Establish TNC Investment Offsets
 - Establish Exemptions
 - Distribute Access Funds
 - Access Providers



A Rapidly Changing Field

DISCLAIMER

- Shared mobility ecosystem is **continuously evolving**
- Our understanding of the effects of these services will also be **changing over time**
 - Example: Electric Shared Scooters
- **On-going data collection and research** occurring nationwide
 - MTC
 - LA Region
 - Universities
 - Consultants



Shared and New Mobility

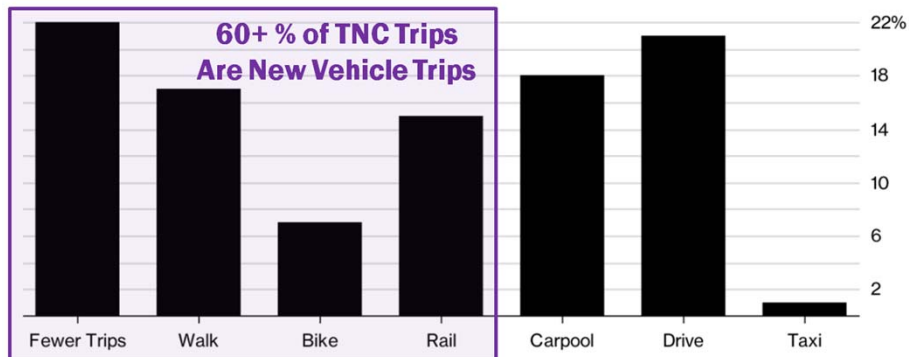
Data and Use Trends
Emerging Issues



What Is Prompting Interest in TNCs?

What's Uber Displacing?

How people would travel if they weren't taking Uber or Lyft



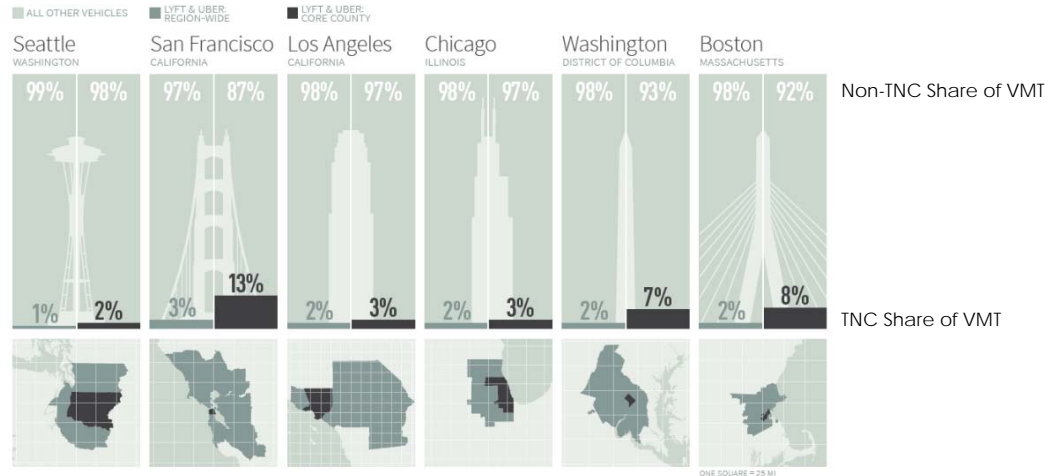
Note: Rail data includes bus.

Source: University of California, Davis Institute of Transportation Studies.

Bloomberg

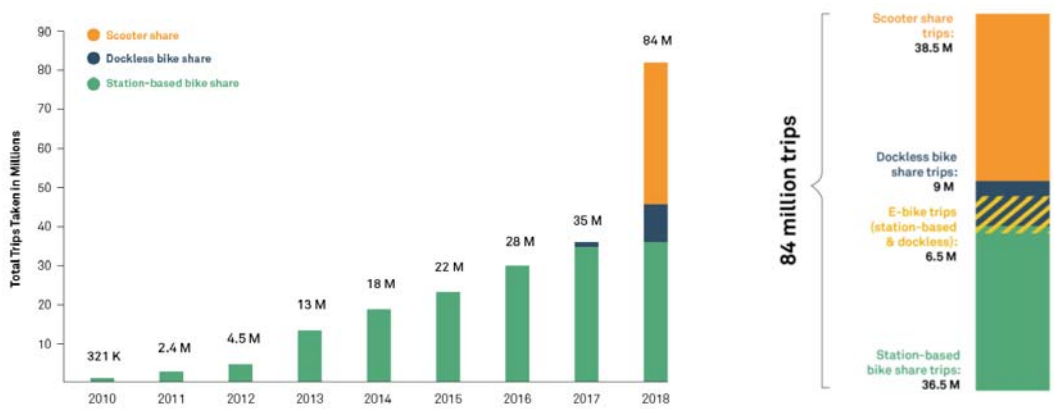


What Is Prompting Interest in TNCs?



What is Prompting Interest in Micromobility?

84 Million National Trips on Micromobility in 2018



Source: National Association of City Transportation Officials (NACTO).



Emerging Issues

CONGESTION

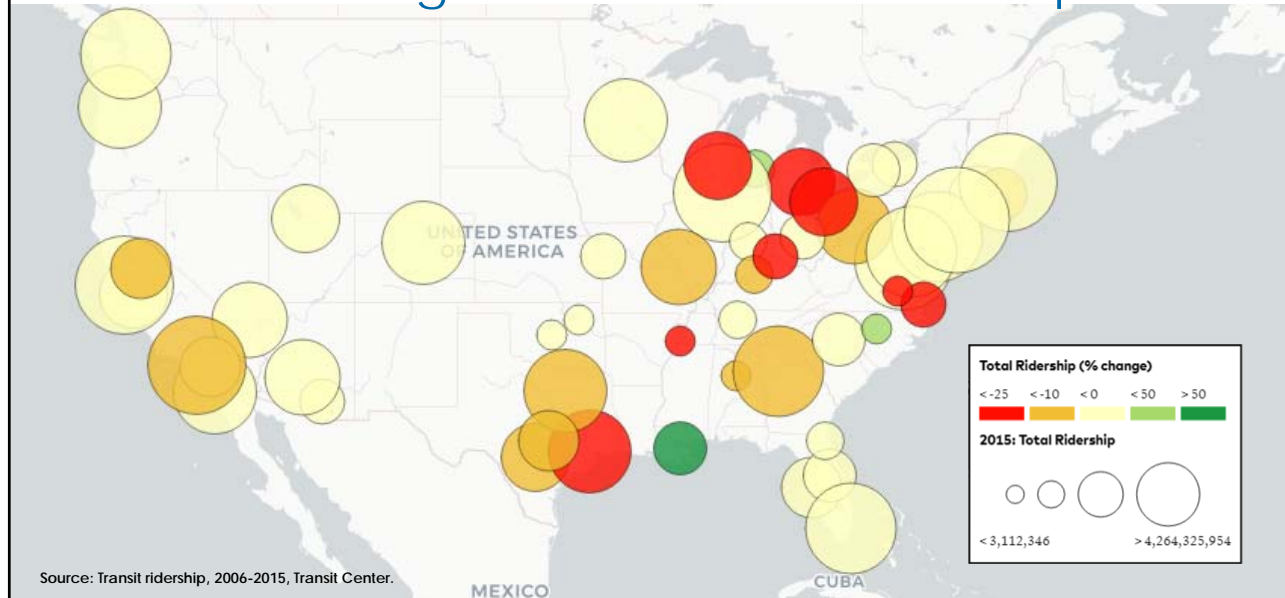
- San Francisco County Transportation Authority (SFCTA) Analysis – TNC’s account for:
 - 51% of increase in delay 2010-2016
 - 25% of total vehicle congestion citywide
 - 36% of delay in downtown core
- E-bikes and E-scooters:
 - Competition for road and sidewalk space
 - Safety



Source: San Francisco County Transportation Authority (SFCTA).



What Is Going On With Transit Ridership?



Source: Transit ridership, 2006-2015, Transit Center.

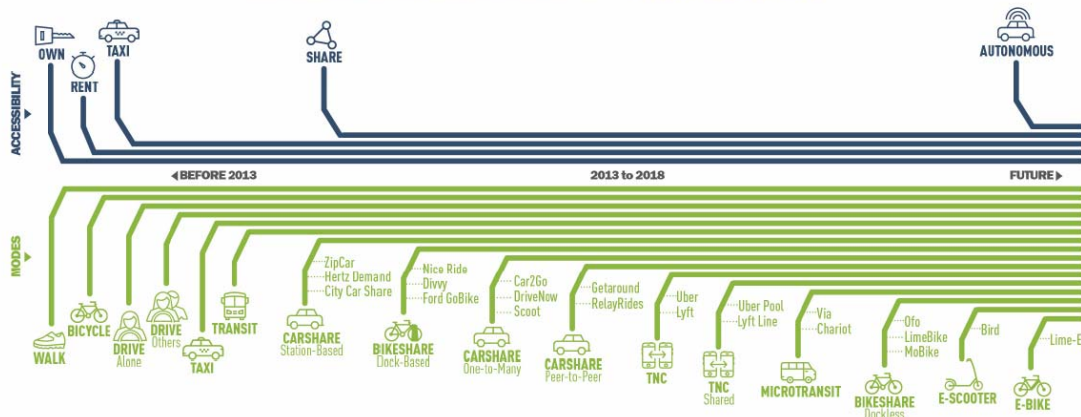
Bay Area Transit Ridership Trends

- 2018/19 ridership increases for AC Transit and LAVTA
- BART ridership declines during certain periods
- Overall declines on nights and weekend
- MTC Transit Use Study – anticipated release early 2020



Impacts Will Increase As Options Increase

VEHICLE ACCESSIBILITY & TRAVEL MODE



Overview of Trends

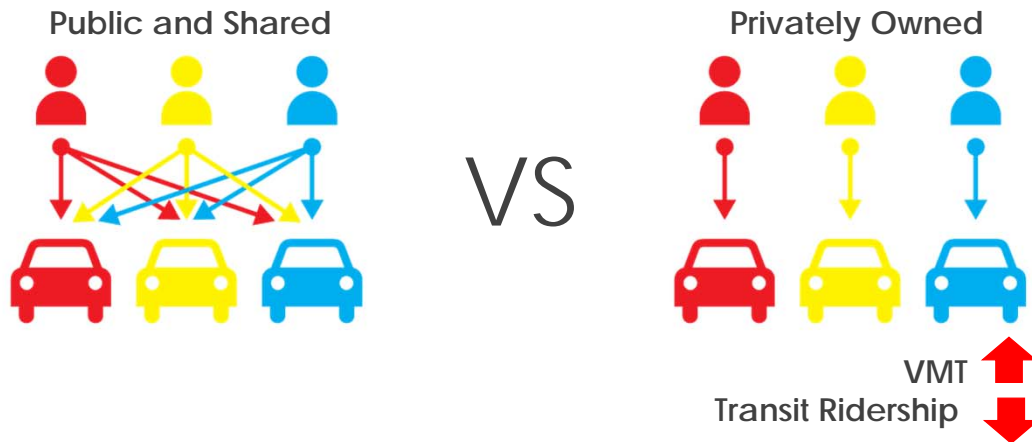
Shared Mobility	TNCs	Bike Share/Scooter Share
Where you will see them	Urban areas of a region Highest concentration in core of urban areas	
Strong markets	Nights, weekends Airport trips	Early evening, weekends Some urban commuting First/last mile to rail
Weak markets	Long distance Commute trips Family trips	Long distance Family trips
Trip Frequency	Low (60% less than 3 trips/month)	



Potential Long-Term Travel Impacts



New Mobility Models



What Can Be Inferred?

- Private sector incentivized to sell “miles of travel”
- Increase in vehicle travel has already begun to occur
- Current off-peak bus transit service susceptible to largest shift
- Infrastructure decisions we make today will matter
- Policy and regulation interventions can shift toward affordability and equity

Example: Increasing Equity on Income

Most users are still affluent, **but** emerging trends and policy direction suggests TNCs, bike share and scooter share can provide new mobility for low-income communities.

CityLab “Lyft is reaching L.A. neighborhoods where taxis wouldn’t.”

Mobility and Equity

How Oakland is getting scooter regulation right — and changing the complexion of urban transportation.

By *Diego Aguilar-Canabal*

AVERAGE MONTHLY SPENDING ON RIDE-HAILING

ALL WOMEN SURVEYED



WOMEN WITH HH INCOME < \$25K

WOMEN WITH HH INCOME \$25K+

Source: LA Metro



Example: Increasing Equity on Access

CALIFORNIA SB 1376: TNC ACCESS FOR ALL ACT



Image source: techcrunch.com

TNC Choose a Ride Screen



Assist 4

\$7.12

12:17pm

Special assistance from certified drivers



WAV 4

\$7.22

12:17pm

Wheelchair accessible rides





Policy Implications for the 2020 CTP



A Role for Investment Decisions

Some ideas:

- Creating exclusive, shared facilities
- Right-of-Way management
- Adapting infrastructure to increase safety of all users (including motorized)
- Advancing equitable deployment of new and shared systems



Rethinking the Transit Market

SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS (SCAG)/
UNIVERSITY OF CALIFORNIA LOS ANGELES STUDY

“If one out of every four of those people replaced a single driving trip with a transit trip once every two weeks, annual ridership would grow by 96 million—more than compensating for the losses of recent years.”

Falling Transit Ridership: California and Southern California (2018)

77%

of people in the SCAG region ride transit rarely or never



Potential Issue Areas and County Roles as Suggested by ACTAC

- Curbspace management
- Safety – speed, collision data, sidewalk space
- Alameda CTC as a resource for best practice – infrastructure and data protocol
- Formalizing TDM linkages



Resources

OCTOBER 14 PPLC MEMO

Research and literature cited throughout

Attachment A: Overview of Fees and Taxes for TNCs in U.S. Cities

Attachment B: Overview of California Senate Bill 1376 (Hill): TNC Access for All Act



Thank You