



# TriMet Board of Directors Strategy Session

April 10, 2019



## Mobility Solutions

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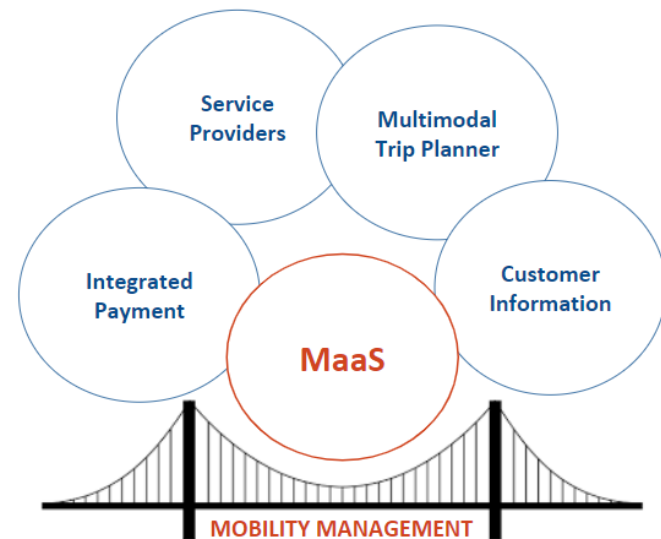
# Mobility Solutions

*“Putting Customers First”*

Door to door convenient transportation

Plan-Book-Pay Application

Moves beyond traditional transit operations to a more holistic, comprehensive approach to a larger transportation ecosystem.



...Taking Complex Service Alternatives and Simplifying for the Customer

# Mobility Solutions Objectives



- Reduce customer planning and travel options “frictions” and anxiety
- Reduce congestion
- Improve customer experience
- Improve overall transportation network
- Cater to all travelers (age, disadvantaged, low-income)
- Work in driver-controlled & autonomous environment
- Deliver and simplify customer experiences across all key regional modes (KISS)

# OpenTripPlanner



© Mapbox © OpenStreetMap Improve this map

Official OTP Deployment    Unofficial OTP Deployment    OTP Prototype, Technical Previews, Demos

**New York State Department of Transportation**  
Albany, NY

**Arlington County Commuter Services**  
Arlington, VA

**TriMet**  
Portland, OR

**Helsinki Regional Transport Authority**  
Helsinki, Finland

**Municipal Transport Company of Valencia S.A.U**  
Valencia, Spain

**SMTC, Grenoble Alpes métropole, Île de France**  
Grenoble, France

**Service des Transports en Commun de l'Agglomération Rennaise (STAR)**  
Rennes, France

**Urban Transport Authority of Poznań (ZTM Poznań)**  
Poznań, Poland

**ZTM Lublin**  
Lublin, Poland

**Adelaide Metro**  
Adelaide, Australia

**ViaggiaTrento and ViaggiaRovereto**  
Trento Province, Italy

**Smart Campus Project**  
TrentoRise, UNITN, and FBK, Italy

**Ruter**  
Oslo, Norway

**USF Maps**  
Tampa, FL

**Regional Transportation District**  
Denver, CO

**Cherriots, Salem-Keizer Transit**  
Salem, OR

**SMRT**  
Singapore

**SoundTransit**  
Seattle, WA

**Vermont Agency of Transportation (V-Trans)**  
Montpelier, VT

**Singapore Nextride**  
Singapore

**BJCTA**  
Birmingham, Alabama

**Netherlands (Nationwide)**

**A Coruña, Spain**

**Athens, Greece**

**Budapest, Hungary**

**Canberra, Australia**

**London, UK**

**Marseille Métropole**

**Portugal**

**South Africa**

**Tampa, Florida**

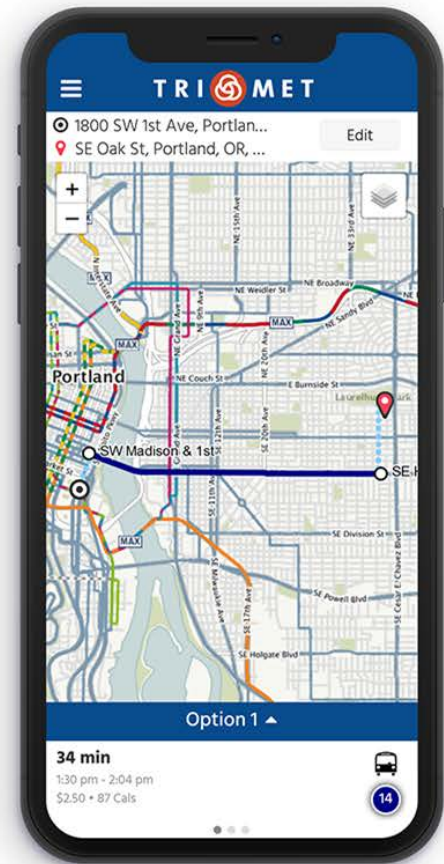
**Central Ohio Transit Authority (COTA)**  
Columbus, OH

**Estonia**

**Sweden**

# Beta Planner Launch

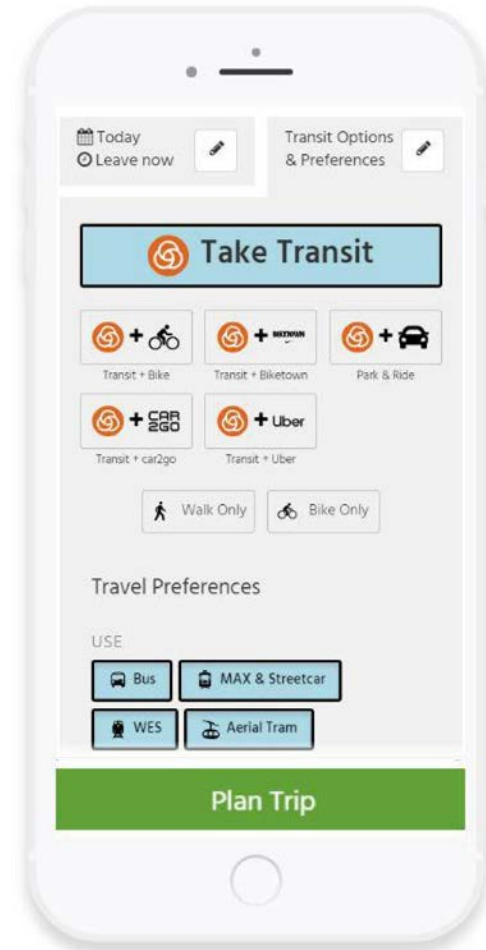
## March 12, 2019



# Multimodal Trip Planning

Key component to  
**PLAN-BOOK-PAY**

Addresses first & last mile





# Fare Policy

A woman with long dark hair is sitting on a bus, looking out the window. The image is overlaid with a dark interface. In the top left, a green checkmark is above the text "Month Pass Earned". Below that, a purple box contains the text "You ride free until the next month!". At the bottom right, a purple box shows "\$100" above a progress bar consisting of many small vertical bars.

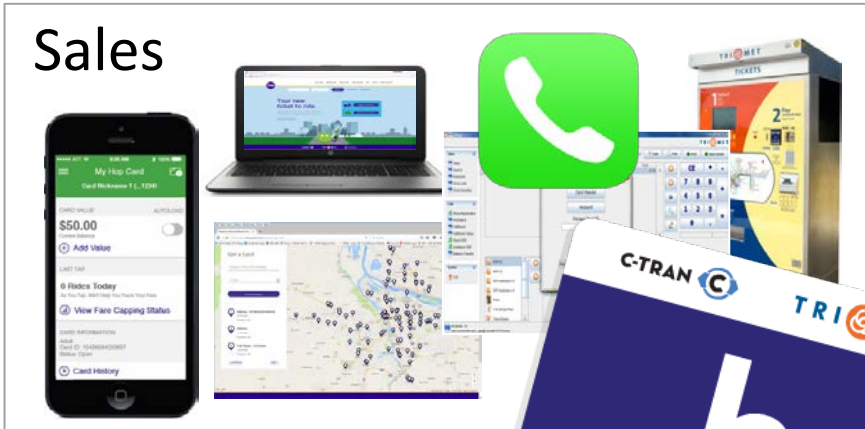
Month Pass Earned

You ride free until the next month!

\$100

# Account-Based

## Sales



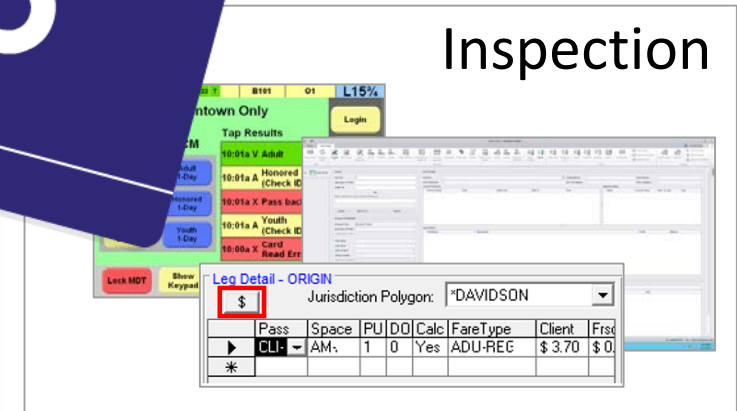
## Support



## Payment



## Inspection





# Retail Network



Map Satellite

## Get a Card

Enter Address or Zip Code

5 miles

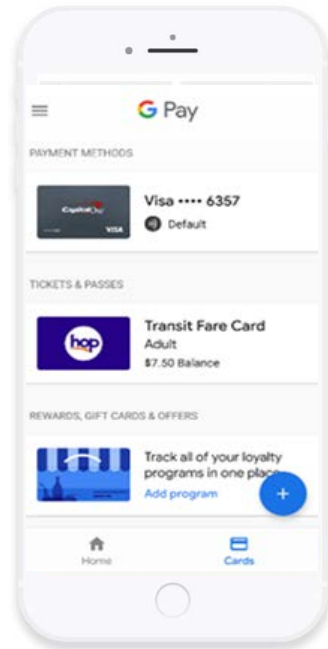
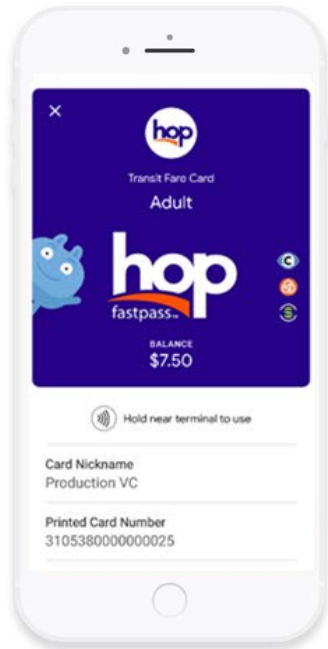
**Find Retailers Nearby**

- 1 TriMet Ticket Office**  
0.02 miles  
Pioneer Courthouse Square  
Portland, OR  
Mon-Fri 8:30am-5:30pm
- 2 Picomart**  
0.12 miles  
Portland, OR  
503-222-2254  
Mon-Fri 7:00am-7:00pm; Sat  
9:00am-6:00pm
- 3 7-Eleven (reload, cash only)**  
0.20 miles  
Portland, OR  
503-332-2202  
Daily 24 hours

[Previous](#) [Next](#)



# Virtual Card



Introducing the virtual Hop card for Android

hop + G Pay = hop





# Disruption

private mobility service providers

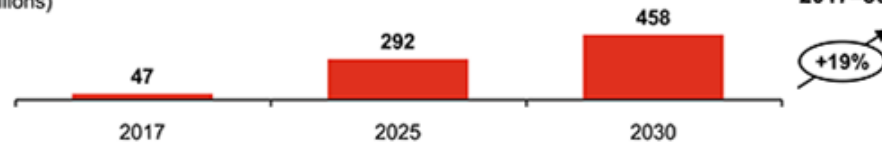


# State of the Industry

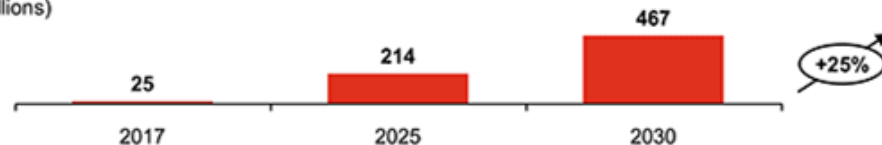
## *“Battle for the Customer”*

The value of shared mobility (“MaaS”) will reach ~US\$1,500 billion in the U.S./E.U./China in 2030, growing at combined 24% p.a. from 2017 to 2030

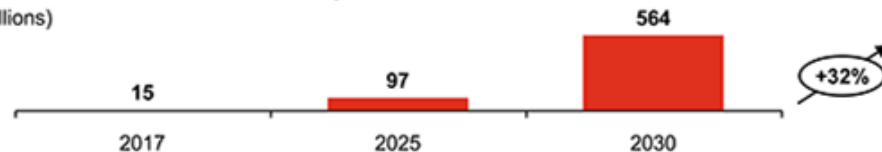
**Estimated MaaS market size development, U.S.**  
(in US\$ billions)



**Estimated MaaS market size development, E.U.**  
(in US\$ billions)



**Estimated MaaS market size development, China**  
(in US\$ billions)



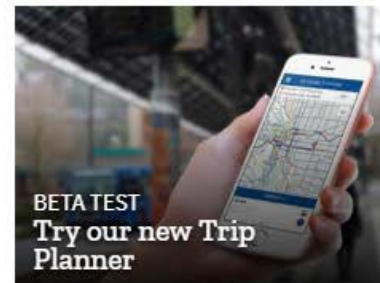
### Comments

- Global vehicle-based passenger travel as key underlying driver
- Total (shared/traditional) price per distance traveled derivation based on historical household spending
- Price for shared mobility significantly decreasing due to
  - reduced vehicle-related costs (efficiency, maintenance)
  - autonomous driving
  - intensification of sharing/pooling

Source: Expert interviews; PwC Autofacts; Strategy& analysis  
The 2017 PwC's Strategy& Digital Auto Report

# What is TriMet Doing to Support a Changed Vision and Changing Services?

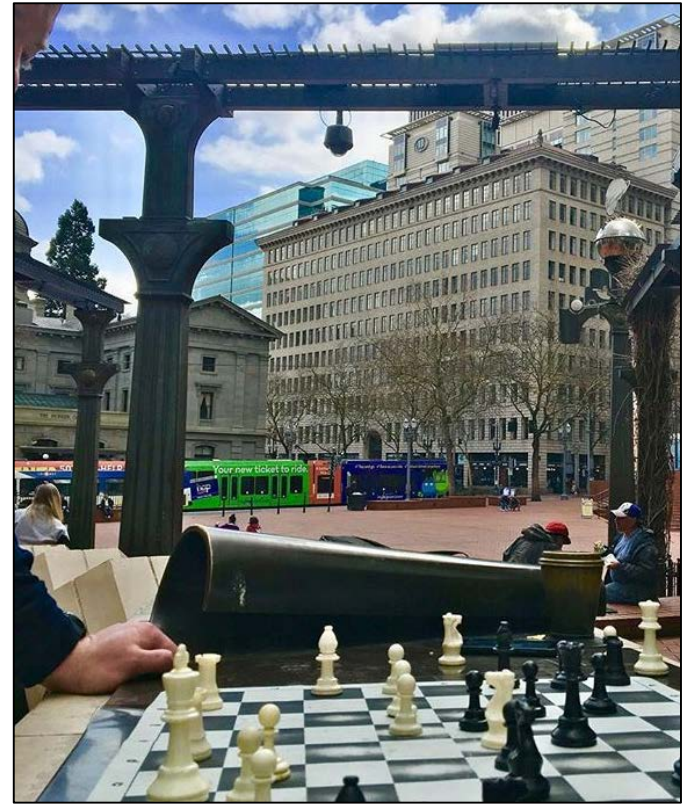
- Hop
- Multimodal Trip Planner
- Loyalty Program Business Case
- Siemens Pilot (ROOT)
- Smart Cities Strategy/Action Plan
- RFP for Consultant for Mobility Solutions Strategy



# What Else Can TriMet Do?

## Recommendations to Consider:

- Focus on faster, cheaper, equitable, safer and more reliable service
- Monitor market
- Position as regional mobility manager
- Strategy, direction, influence
- Be agile, adaptive, flexible
- Proactive with policy and data management



# Discussion

