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)
Beta Planner Launch
March 12, 2019
Multimodal Trip Planning

Key component to PLAN-BOOK-PAY

Addresses first & last mile
Fare Policy

You ride free until the next month!

$100
Account-Based

Sales

Support

Payment

Inspection
Retail Network

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. Picoware
   - 0.12 miles
   - Portland, OR
   - 503-322-2254
   - Mon-Fri: 7:00am-7:00pm, Sat: 9:00am-6:00pm

3. 7-Eleven (reload, cash only)
   - 0.20 miles
   - Portland, OR
   - 503-322-2202
   - Daily 24 hours
Virtual Card

Introducing the virtual Hop card for Android
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.**

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2025</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value (in US$ billions)</td>
<td>47</td>
<td>292</td>
<td>458</td>
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</tbody>
</table>

**Estimated MaaS market size development, E.U.**

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2025</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value (in US$ billions)</td>
<td>25</td>
<td>214</td>
<td>467</td>
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</tbody>
</table>

**Estimated MaaS market size development, China**

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2025</th>
<th>2030</th>
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</thead>
<tbody>
<tr>
<td>Value (in US$ billions)</td>
<td>15</td>
<td>97</td>
<td>564</td>
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</table>

**CAGR 2017–30**

- +19%
- +25%
- +32%

**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
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