

Em



powering *the* Multimodal Journey

By Jon Ziglar

TODAY'S INNOVATIONS ARE FUNDAMENTALLY CHANGING the way people live. We're hearing more and more about technologies that are autonomous and electric, connected and shared, and on-demand and in real-time. We've seen a rise in ride-hailing companies like Uber and Lyft, car-sharing companies like Car2Go and Zipcar, bike-sharing and scooter-sharing networks, mass-transit systems, intermodal transportation, autonomous vehicles, alternative fuel, and artificial intelligence. These shifts in the industry have widely affected the way mobility professionals are doing business as their jobs become increasingly integral to the design, management, and operations that provide consumers with multimodal efficiency.

The Mobility Landscape

Today's mobility solutions are enabling people to move around more freely than ever before. As these solutions continue to evolve and expand, it's not about which mobility player is going to win in the end, but about how all of the available options fit together to create a seamless mobility journey for the consumer. User experience is continually being elevated in every single aspect of our lives, and each mobility player that has disrupted the market in recent years has contributed to the phenomenon we're all experiencing: a technologically optimized experience with transportation and mobility.

By offering users different transportation methods to get from place to place, mobility solution providers are enabling them with the option to choose which method or combination of methods is most convenient. While cars remain the default for many urban trips,

other transportation options are a key component of the consumer journey. In reality, some hybrid of these mobility solutions is what's going to actually make our lives easier. And as the options diversify, the potential for a truly interconnected mobility experience actually becomes more realistic.

The Multimodal Consumer

ParkMobile recently conducted a survey with over 500 users to see what mobility services people are engaging with beyond the app. We began our research by defining today's most common modes of transportation in urban environments: 1) walking, 2) scootering, 3) biking, 4) driving a personal car, 5) ride-hailing (i.e. Uber, Lyft), 6) car-sharing (i.e. Car2Go, Zipcar), and 7) public transit. Our survey results confirmed that users are engaging with all of these modes – proving our hypothesis that consumers across the board are using a variety of

User Survey Highlights

ParkMobile users are also using a variety of other mobility solutions every month to get where they are going.



55% use public transit



54% use a ride-hailing service



40% use a bike or scooter-sharing service



31% use a car-sharing service

mobility solutions to get from place to place in the most efficient way. Today's consumer is, in fact, multimodal.

Which of these modes are people engaging with the most?

Public Transit

Public transit was the most popular mode of transportation, with 55 percent of respondents engaging with public transit every month. Despite owning a car, 13 percent of respondents actually engage with public transport more than 10 times per month. For their daily commute, many of these consumers drive their car to the nearest public transit station before taking the bus or train to work. This scenario defines a clear intersection between parking and transit: car-owning consumers often use their cars to get to the nearest transit station in the first place, and before they can board the bus or train, their cars need to be parked in the transit lot.

Ride-Hailing

Our survey results showed that 54 percent of our respondents use a ride-hailing service every month. Again, we see that car-owning consumers still engage with alternate mobility services to get from place to place. In this case, the majority of consumers are now engaging with ride-hailing—proving that while consumers may own a car, they still like having the

option to request a driver on-demand. Maybe you're going out to dinner and plan to have a few glasses of wine. Or you're going to the airport and you don't want to deal with parking. Ride-hailing provides a good alternative in certain situations even if you own a car. According to a study by the Pew Research Center, roughly two-thirds (64 percent) of regular ride-hailing users ("regular" defined as those who use ride-hailing services on a daily or weekly basis) say they own a personal vehicle. Interestingly, household vehicle ownership has actually increased in the cities where Uber and Lyft are most heavily used. (CityLab)

Bike-Sharing and Scooter-Sharing

In the past few years, we've seen an explosion of bike-sharing companies, such as Citi Bike and Divvy, and scooter-sharing companies, such as Bird and Lime, hit cities. Bird is now available in over 120 cities after only two years on the market, and the company's success has made it the fastest start-up to reach a \$1 billion valuation. (QZ.com) Uber recently entered the bike and scooter-sharing space with Jump and a heavy investment into Lime, while Lyft acquired Motivate in July 2018. Even though bike and scooter-sharing services are relatively new to the market, a striking 40 percent of people we surveyed are now using those services every month.

Car-Sharing

Following bike and scooter-sharing services, 31 percent of respondents said that they engage with a car-sharing service on a monthly basis. Car-sharing companies, such as Car2Go, Zipcar, and Turo, are currently on the rise, especially as the traditional concept of car ownership is evolving with the rise of various on-demand mobility services. Turo now offers cars in over 5,500 cities and 300+ airports across the United States, Canada, and Europe. By 2024, it's predicted that the car-sharing market will be worth \$11 billion due to its financial benefits to consumers. (Marketwatch) By moving away from car ownership, consumers eliminate the costs incurred to purchase, insure, and maintain the vehicle over time.

The Intermodal Commute

Interestingly, 70 percent of our survey respondents have used multiple mobility services in a given day. A consumer's day is now intertwined with several modes of transportation for traveling most efficiently between destinations. For example, you might use

70%

have used multiple mobility services in a given day.

You drive and park your personal car at work. You take a bike-share to and from lunch. After work, you take a ride-hailing service to grab drinks with a friend.

48%

have used multiple mobility services when navigating to a single destination.

To get to work, you drive and park your car at the nearby train station, board the train, get off at the stop six blocks from your office, and then take a scooter-share the remainder of the way.

public transit to get to and from work. To grab lunch with your coworkers, you might take a bike-share to a restaurant nearby. After work, you might use your personal car to drive to the grocery store, where you're required to use a parking app to pay for a spot in the deck. Later that evening, you might use a ride-hailing service to grab drinks with a friend.

Our research indicates that 48 percent of users have used multiple mobility services when navigating to a single destination—an experience that goes from “multimodal” to “intermodal.” For example, to get to work, you might drive and park your car at the nearby transit station, board the train, get off at the stop six blocks from your office, and then take a scooter-share the remainder of the way. In this example, you engage with three modes of transportation in your daily commute—your personal car, public transit, and a scooter-share. And while this commute does involve multiple touchpoints, it's the combination of options that ends up saving the consumer the most time and money.

The Demand for Interconnected Technology

During the last decade, we've become used to doing everything on our phones. We order whatever food we're craving, map to our next destination, check out various account balances, and communicate with others around the world. Mobile apps have fundamentally transformed nearly every aspect of our lives, and with the steady increase in population density that urban communities have been experiencing, the demand for interconnected technology is greater than ever.

By providing access to the many mobility solutions on the market, cities are providing people with a better way to get where they are going, while also enabling them to make a smarter choice around which option or combination of options is most effective for them. REACH NOW, a leading provider of mobile transit

tickets, partnered with Juniper Research to analyze the evolution of urban mobility and subsequent emergence of Mobility-as-a-Service (MaaS), which is defined as “urban transport solutions that are integrated into a single platform by which users can determine the best route and price across several end-to-end travel services and modes, according to real-time data such as traffic conditions, time of day, and demand.” The result of an effective MaaS initiative is a city that helps people on the move while reducing congestion in the process.

In the very near future, this will become the norm. There will be one app that allows consumers to design the most efficient, customized mobility journey for wherever they need to go. These consumers will be able to access every available mobility service from a single touchpoint, ultimately unifying their entire experience. Our research informed us that 38 percent of those we surveyed are interested in a feature in their mobile parking app that allows you to reserve a scooter near the location where you are going to park. This shows that users are interested in an interconnected experience where they will be able to utilize multiple mobility services from one place.

As the industry moves forward, it is important to consider how we're creating a cohesive experience for customers. We must partner together to identify opportunities to reduce friction for users by enabling them with an interconnected, one-stop-shop solution for all of their mobility needs. Now and into the future, we should be prepared to keep learning from our users as we dramatically change the way we think about moving people from point A to point B. ♦



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