

Mobility Update

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Recovery and Resiliency Advisory Committee

January 6, 2021



3 Ideas Underway

→ Let's Accelerate



Develop public/private partnerships to **launch on-demand services in up to 14 neighborhoods** that feed into high-capacity transit



Mobility as a Benefit – Enroll all employers in C-pass-like program for employers to provide transit access as an employee benefit



Transform our communities through the LinkUS initiative – align and build affordable housing, job centers, commercial development, broadband and shared mobility systems which connected to an expanded high capacity transit system

COTA's Strategic Plan



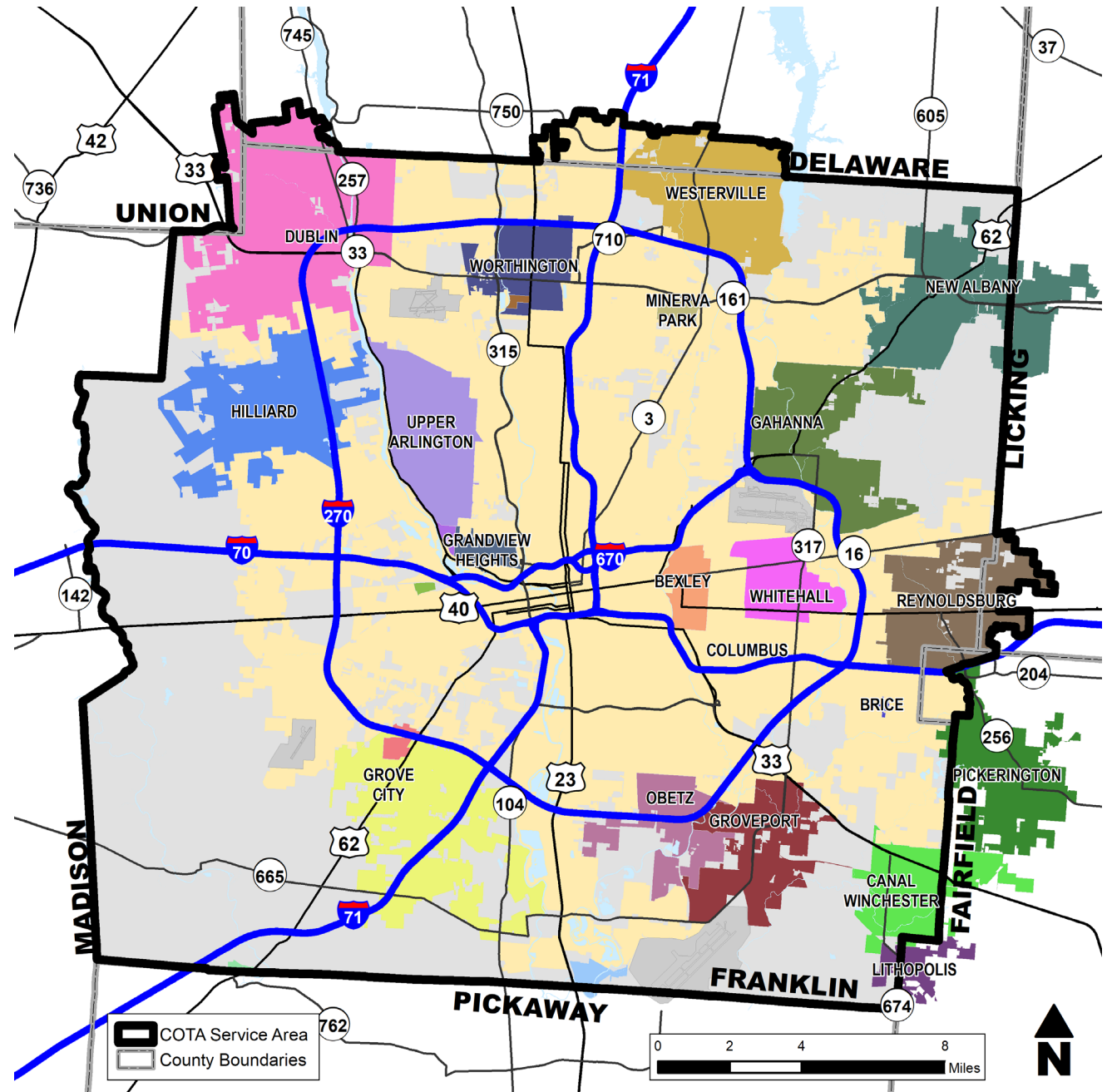
About COTA

Service Area

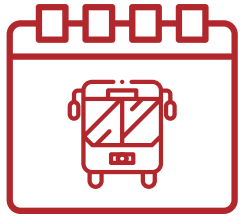
- 562 square miles
- 1.2 million residents
- All of Franklin County
- Portions of Delaware, Fairfield, Licking, and Union Counties

Governed by 13-member board of trustees

New focus on connecting technology systems to five adjacent county transit systems



By the Numbers



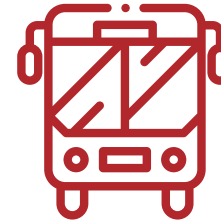
19M+
Annual Trips



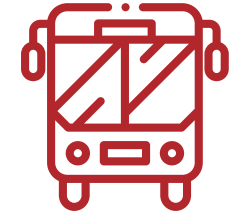
700+
Operators



1,242,354
C-Pass Rides
(Based on 2019 data)



61,000
Daily Trips
(Based on 2019 data)



26,502
Current Daily Trips ~ 43%
(Based on Oct 2020 data)



42
Routes
(Based on 2019 data)



562
Square mile
service area



3,043
Transit stops
(Based on 2019 data)



305,559
Total Mainstream
Rides
(Based on 2019 data)



476
Current Mainstream
Daily Trips ~ 57%
(Based on Oct 2020 data)



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Our Growing Fleet

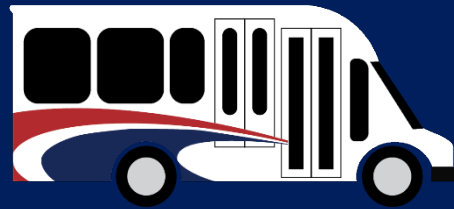
321

**Fixed-Route
Vehicles**



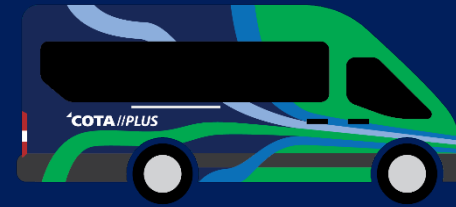
74

Mainstream Vehicles



13

COTA//Plus Vehicles



105

UZURV



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Responding to the Pandemic

COVID-19 Response



Reinventing ourselves from a Transit Authority to a Mobility Solutions Provider.



Developing strategies for a changing world of possibility for our colleagues, customers, and communities.

2020

March 1 – Stop the Spread campaign

March 16 – COTA announces Focused Service

March 19 – COTA suspends fares and begins boarding at the rear door; limit 20 passengers

April 3 – Essential Travel Only aligned with Governor/State of Ohio Stay at Home Executive Order

April 15 – Mandatory Mask Policy (still in place)

April 25 – Essential Service Change

May 21 – Launch of COTA//Plus On-Demand Transit Pilot in Northeast Franklin County

September 21 – Increase Hours, Frequency and On-Demand Service (operating at 82% of hours)

November 23 – Launch of COTA//Plus South Columbus

2021

January 11 – Return to Fares



Extensive Sanitization Protocols

- In April and May 2020, COTA implemented a robust cleaning and [sanitization process](#) to protect customers and employees
 - All vehicles cleaned and sanitized 3-5 times per day
 - All surfaces coated with [Aegis Microbe Shield](#), used by the hospital, trucking and food industries
- GBAC accreditation pursued as [Experience Columbus Live Forward](#) part of pledge



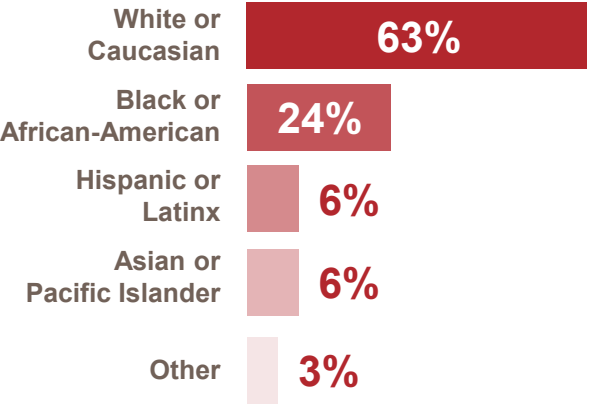
MOVING EVERY LIFE FORWARD

Understanding Customer Needs

Who are COTA Customers?

Franklin County Adults

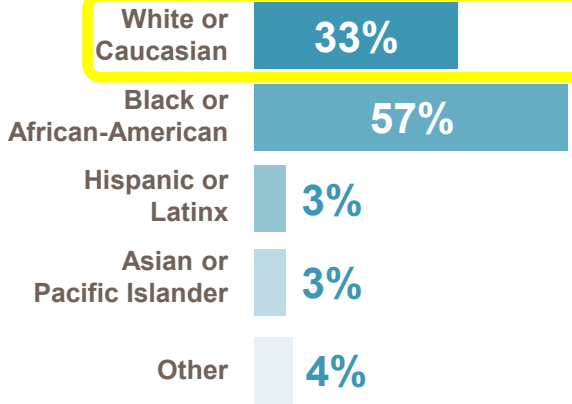
Male: 49%
Female: 51%



18-29: 26% 40-49: 16%
30-39: 20% 50-64: 23%
65+: 15%

COTA Customers (Before COVID-19)

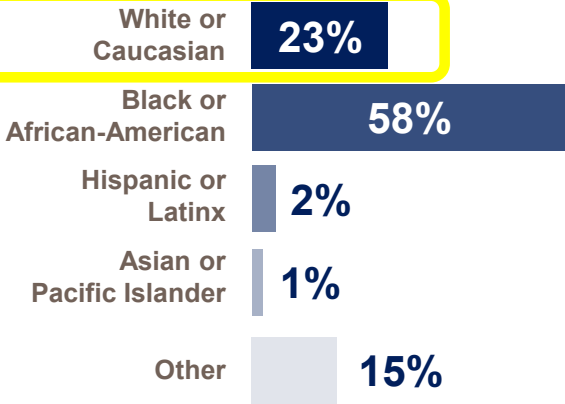
Male: 57%
Female: 43%



18-29: 31% 40-49: 17%
30-39: 23% 50-64: 22%
65+: 4%

COTA Customers (During COVID-19)

Male: 56%
Female: 40%



18-29: 31% 40-49: 18%
30-39: 24% 50-64: 23%
65+: 3%

Who are COTA Customers?

Franklin County Adults

Currently Employed

 **65%**

Lost Job

 **17%***

Lost Hours

 **39%***

Working from Home

 **47%***

COTA Customers (Before COVID-19)

Currently Employed

 **70%**


Lost Job

 **25%****

Lost Hours

 **45%****

Working from Home

 **28%****

COTA Customers (During COVID-19)

Currently Employed

 **62%****

Lost Job

 **26%****

Lost Hours

 **51%****

Working from Home

 **13%****

Lost job, Lost Hours, and working from home percentages are out of employed adults only.

Franklin County data from ACS, so may not be indicative of current employment situation

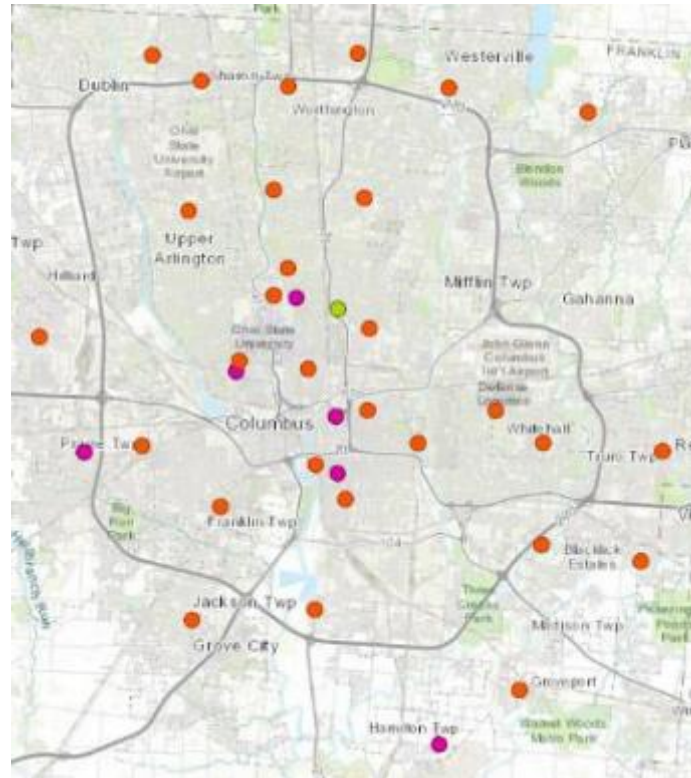
**COTA Customers data from before COVID COTA Customer Survey (2016/19)*

***COTA Customers data during COVID data from COTA Customer Survey (June 2020)*

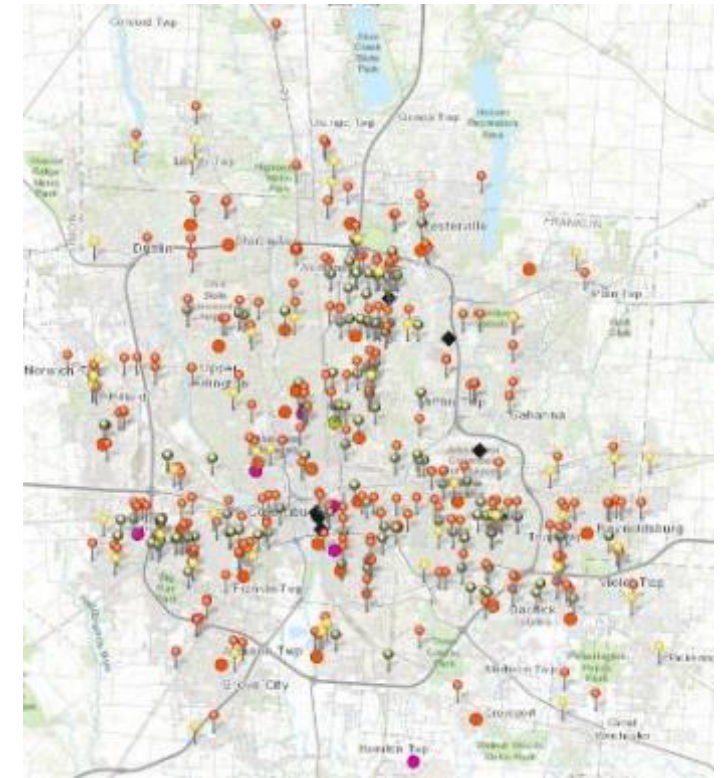
New Fare Management System in 2021

Equitable and expanded access for all types of customers

- App or smart card
- **Customers will be able to put cash on a card or app**
- System will cap fares to ensure best fare for customers
- Improve customer accessibility to obtain passes by launching 400+ retail locations




Current Retail Locations



**1,000% Increase of
Future Retail Locations**



What's Driving Us



The Columbus Region is projected to grow by **1 million** new residents by 2050.

- RAPID INDUSTRY CHANGE
- ECONOMICALLY SEGREGATED
- REGIONAL SPRAWL

Trends & Economic Impacts

Consumer preference for driving & car ownership rapidly shifting

- 16 yo with driver's license < 25% nationally
- Millennials buy 29% fewer vehicles per 1,000 people vs Gen X
- NADA predicts it will take 4 Millennials to replace car sales impact of one Baby Boomer
- **Central Ohio households spend 28%+ of income for transportation costs**
 - Higher than national average
 - Transit-only households spend roughly 10% on transportation
 - Blended households (car + transit) spend less than 20%
- Columbus metro area **loses \$1.1B annual productivity** due to congestion
- 'State of Good Repair' costs in Franklin County entities **\$0.5B per year**
- Safety losses per year in Franklin County (2019)
 - **\$1.8B in economic loss**
 - 110+ fatalities
 - 718 serious injuries



or



Trends

Mobility as a Service & Mobility on Demand

“Whole community” approach to reducing personal vehicle ownership and travel supporting mobility options for all.

Why in Central Ohio?

- **1 in 5 African Americans commuters in Columbus do not own a car**
- Fixed route service not necessary in all areas
- Many jobs and residents continue to move into areas outside COTA's primary network

Our Peer Cities/Globally

- Transit agency partnerships to extend reach of mass transit system
- Growth rate of **car sharing projected to increase by 25% globally** between 2013-2025
- **Global Market valuation \$14B in 2014 to estimated \$334B in 2025**



Trends Being Applied

Filling gaps in transit networks with on-demand services like microtransit partnerships, micromobility . . . while transforming to walkable, bikeable 15-min cities through transformed housing and commercial development.

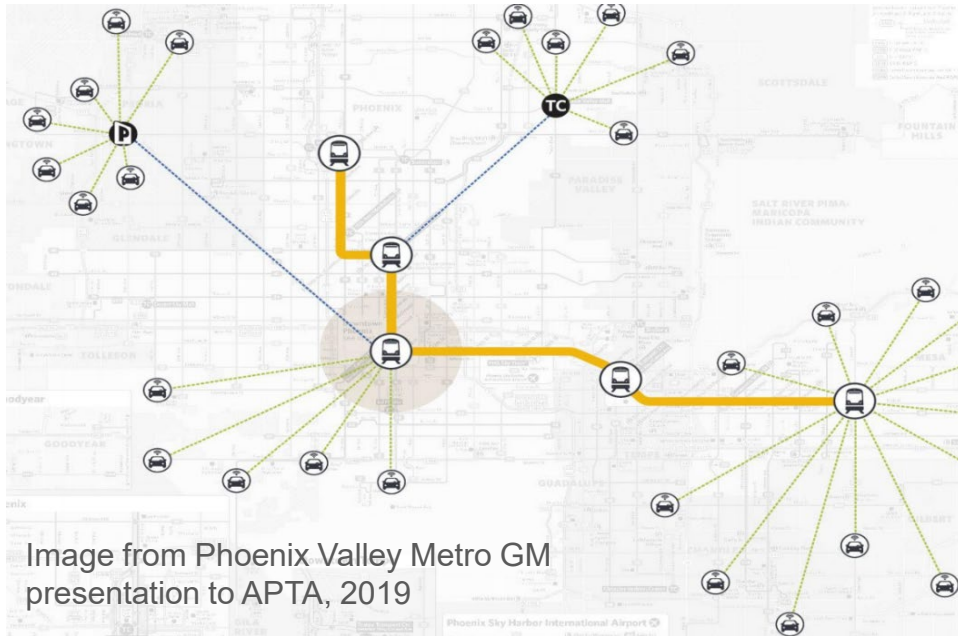


Image from Phoenix Valley Metro GM presentation to APTA, 2019

Seattle Houston Tampa Austin Pittsburgh San Antonio
Detroit Las Vegas Charlotte Los Angeles Chicago
Denver Phoenix Portland Jacksonville Indianapolis
Kansas City



The City of Seattle Transit Program supports King County Metro and other transit providers by working to ensure transit is supported with much-needed on-street infrastructure.

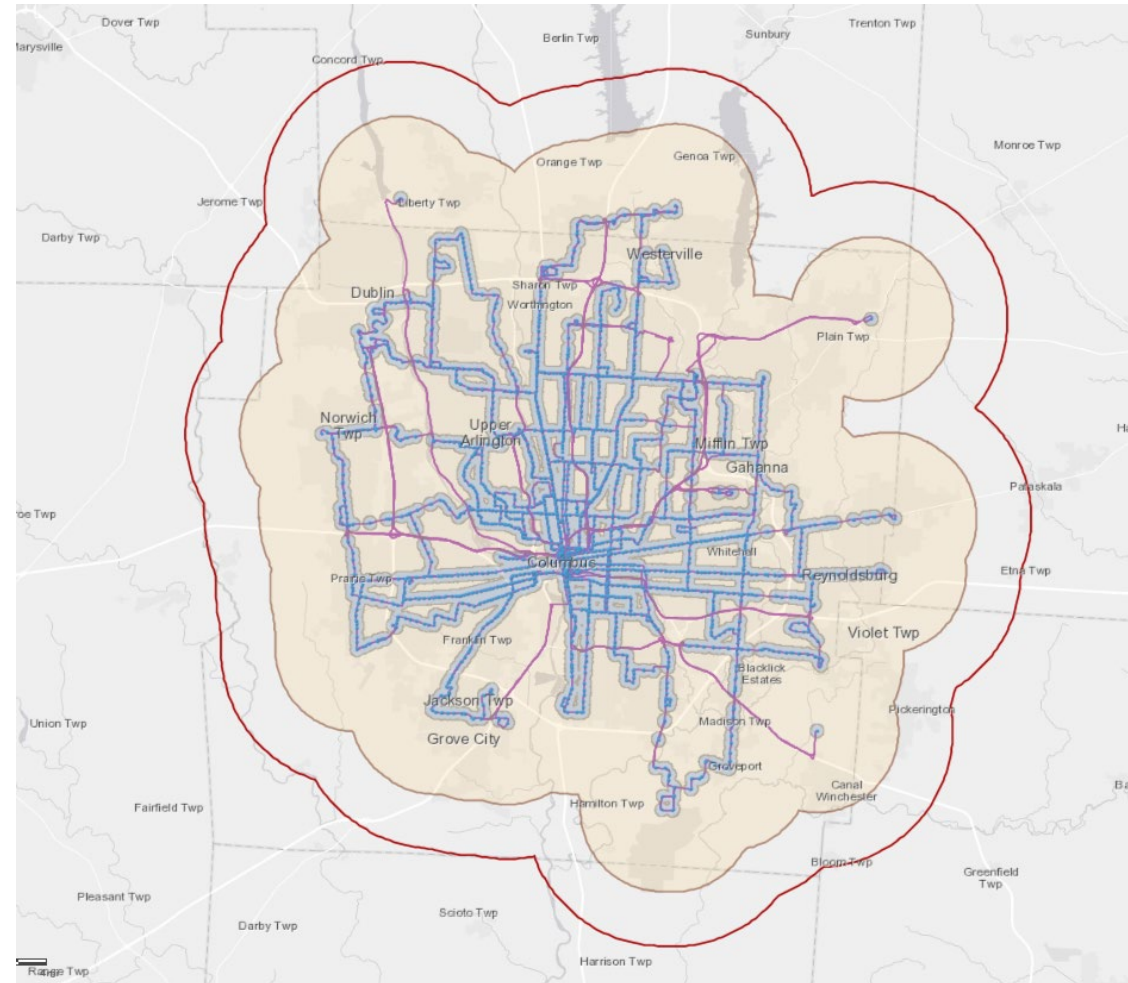
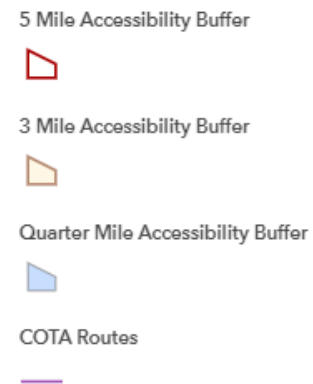


San Antonio VIA celebrates it's 1000th new shelter
95% of VIA trips now start at a sheltered stop. VIA partnered with the city of San Antonio to connect sidewalks to transit. Ridership bucked the trend and increased in San Antonio.



(Re-imagine) COTA Current System Reach

98% of Columbus population is within 3 miles of COTA's current network



COTA//Plus



First-last mile solution for neighborhoods with mobility needs
Connects to the larger transit system
COTA operated, on-demand microtransit

- Grove City launched spring 2019
- Westerville launched summer 2020
- South Columbus launched winter 2020

Evaluating Neighborhoods

- Density (residential and commercial)
- Gaps in transit service
- Connections to mass transit
- Safety/street lighting/sidewalks
- Proximity to institutions
- Access to job locations
- Educational attainment
- **Equity gaps – South Columbus example**
 - **Employment rate – 41% (Franklin County 66%)**
 - **Car ownership – 12.5%**
 - **Income disparities – Surveys indicate 1 in 5 individuals have little to no confidence they would be able to pay for next month's rent/mortgage**
 - **Job Type – South Side residents with jobs tend to be hourly in nature and have unpredictable work schedules**

Bus on Demand

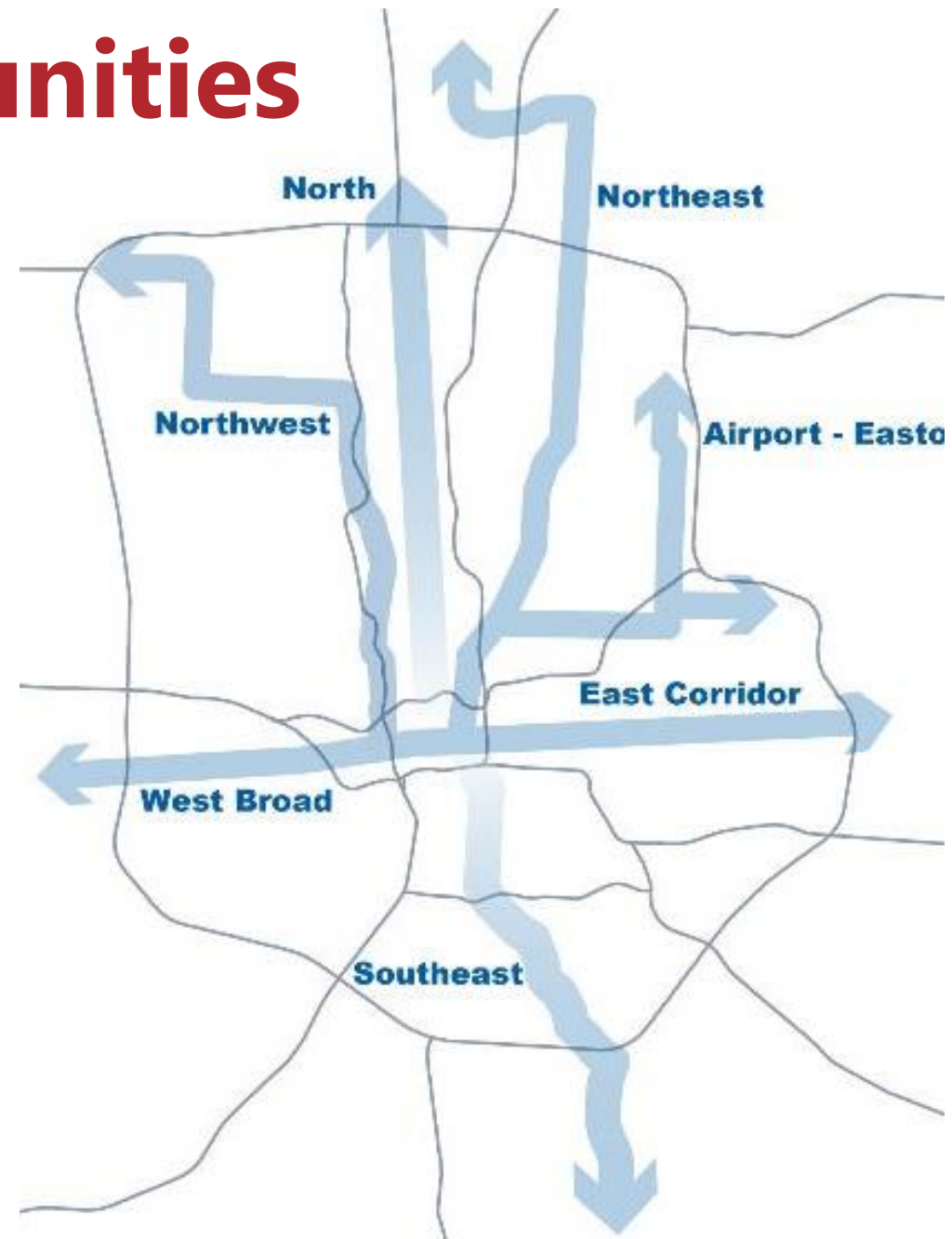
In September 2020, COTA became the first public transportation organization in the United States to launch a full-time Bus On-Demand service

- Customers hail service using COTA//Plus app
- COTA sends a bus to the nearest transit stop for customer
- Rideshare service – customers are picked up with other customers
- Analytics to scale up from microtransit



Transforming our Communities

Focused on increasing equitable access to prosperity through a **complete mobility system and dense development patterns along key regional corridors**; including high capacity advanced rapid transit, new transportation services, bicycle and pedestrian improvements – supporting new patterns of regional development, affordable housing, job opportunities



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