

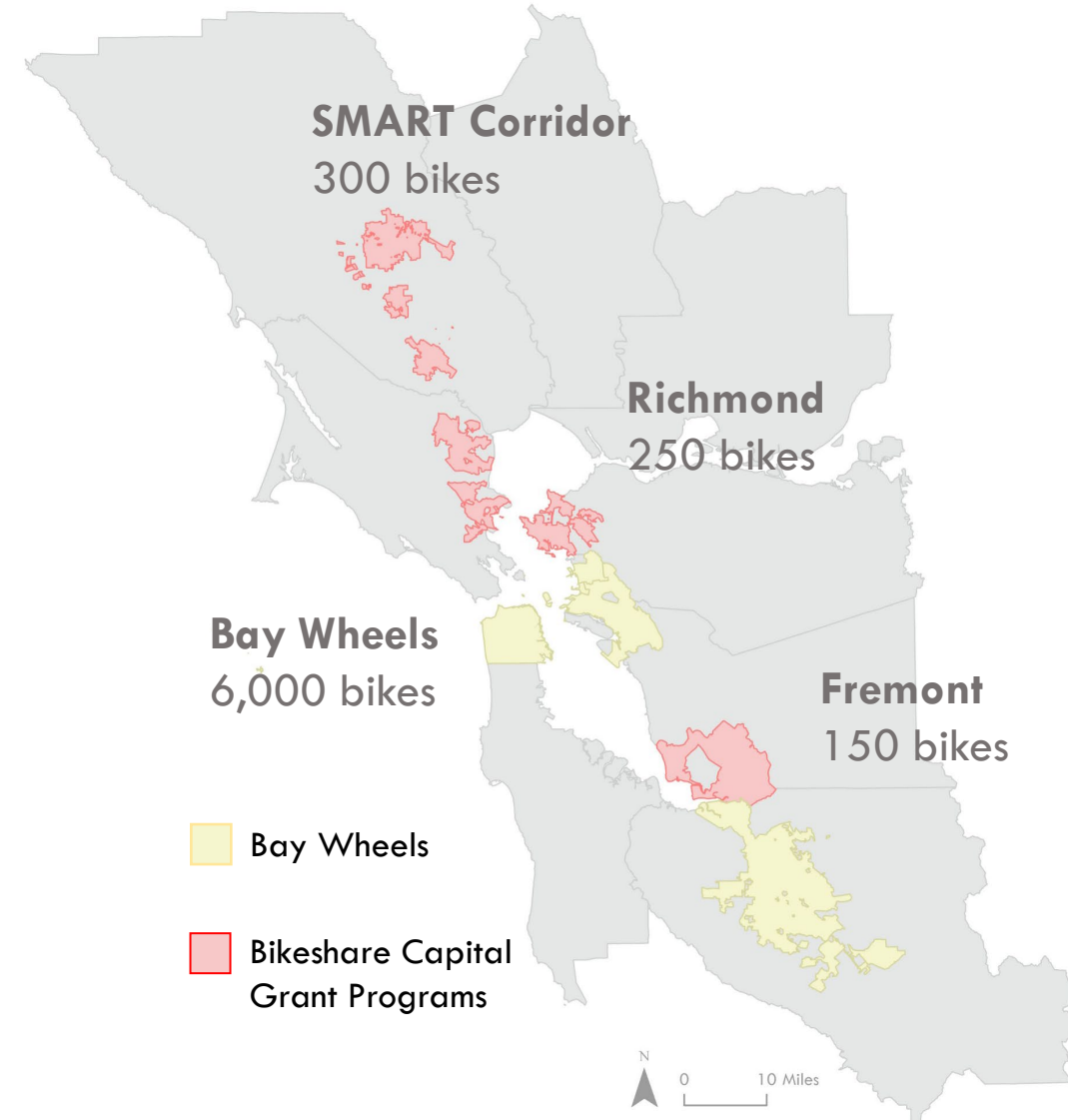
Bikeshare Update



MTC Operations Committee
November 4, 2022

Bikeshare Programs in the Region

- **MTC: Bay Wheels**
 - Launched in 2017 in SF, SJ, Oakland, Berkeley, Emeryville
 - Lyft bought operator in 2018
 - MTC manages \$0 contract with Lyft, and coordination agreement between cities and Lyft
- **MTC: Bikeshare Capital Program**
 - Grant program to pilot bikeshare in less dense areas.
 - Grants awarded to Fremont, Richmond and SCTA/TAM.
 - SCTA/TAM system hasn't launched yet
- **Other Programs:**
 - Cities in San Mateo County planning to launch e-bikes with SMCTD funding
 - Many cities in the region have or are developing shared micromobility (scooters/bikes) permit programs
 - Berkeley launched e-bikes with different operator



Bay Wheels History

2013: **Air District launches Bay Area Bike Share** 2 year pilot in SF, SJ, and Peninsula cities, with up to \$11.4M (only \$8.7 used)

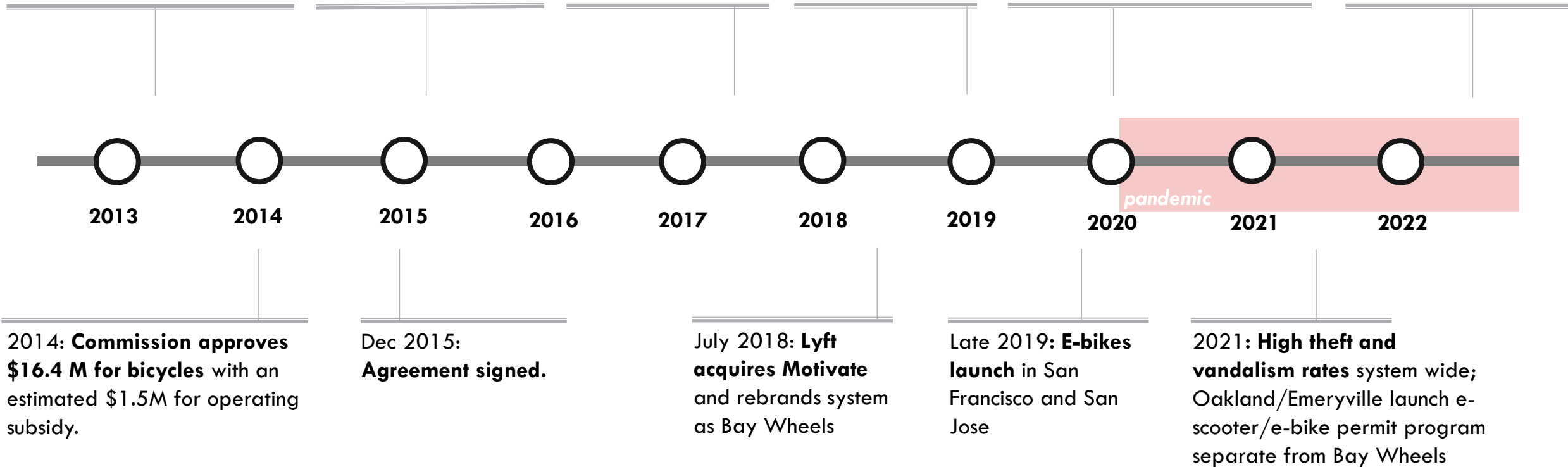
2015: **Commission approves exclusive agreement with Motivate** between 5-cities for 10 year at zero cost.

June 2017: **System launches as Ford GoBike** with Ford as title sponsor

Early 2019: **Failed ROFO for e-bikes**, no regional continuity for e-bikes.

Early 2020: **E-bike roll out continues** with high utilization. **COVID-19 negatively impacts ridership** but system doesn't shut down; 23% of systems in North American shut down

April 2022: **San Jose adds e-bike pricing** and e-bike ridership drops; **Berkeley gets 100 e-bikes** (Spin) thru shared electric mobility permit program



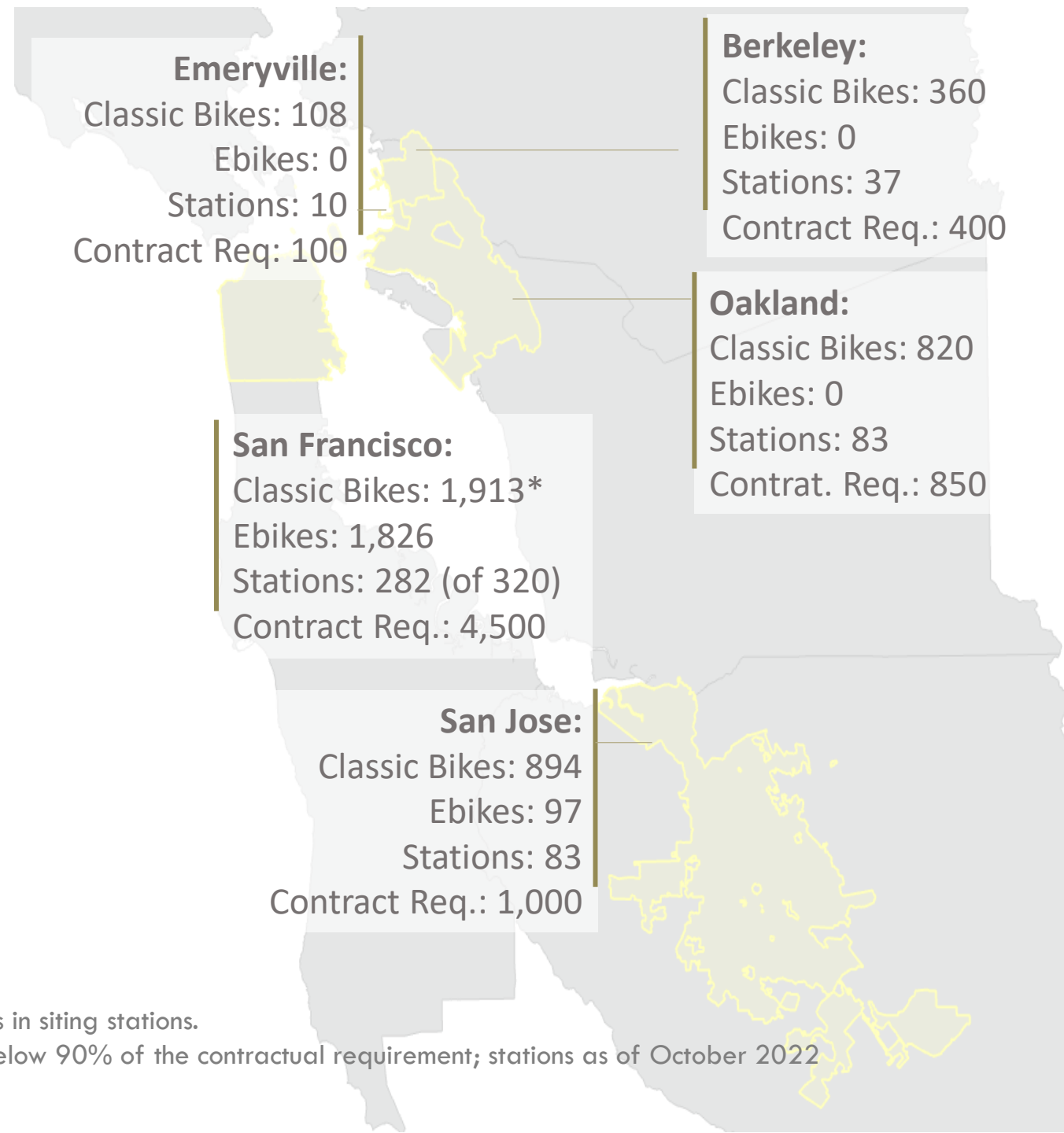
Overview: Bay Wheels

Contract:

- 10 year \$0 contract launched 2017
- Fully built out except San Francisco
 - Major delays in siting stations
- Only includes classic (pedal) bikes

MTC role:

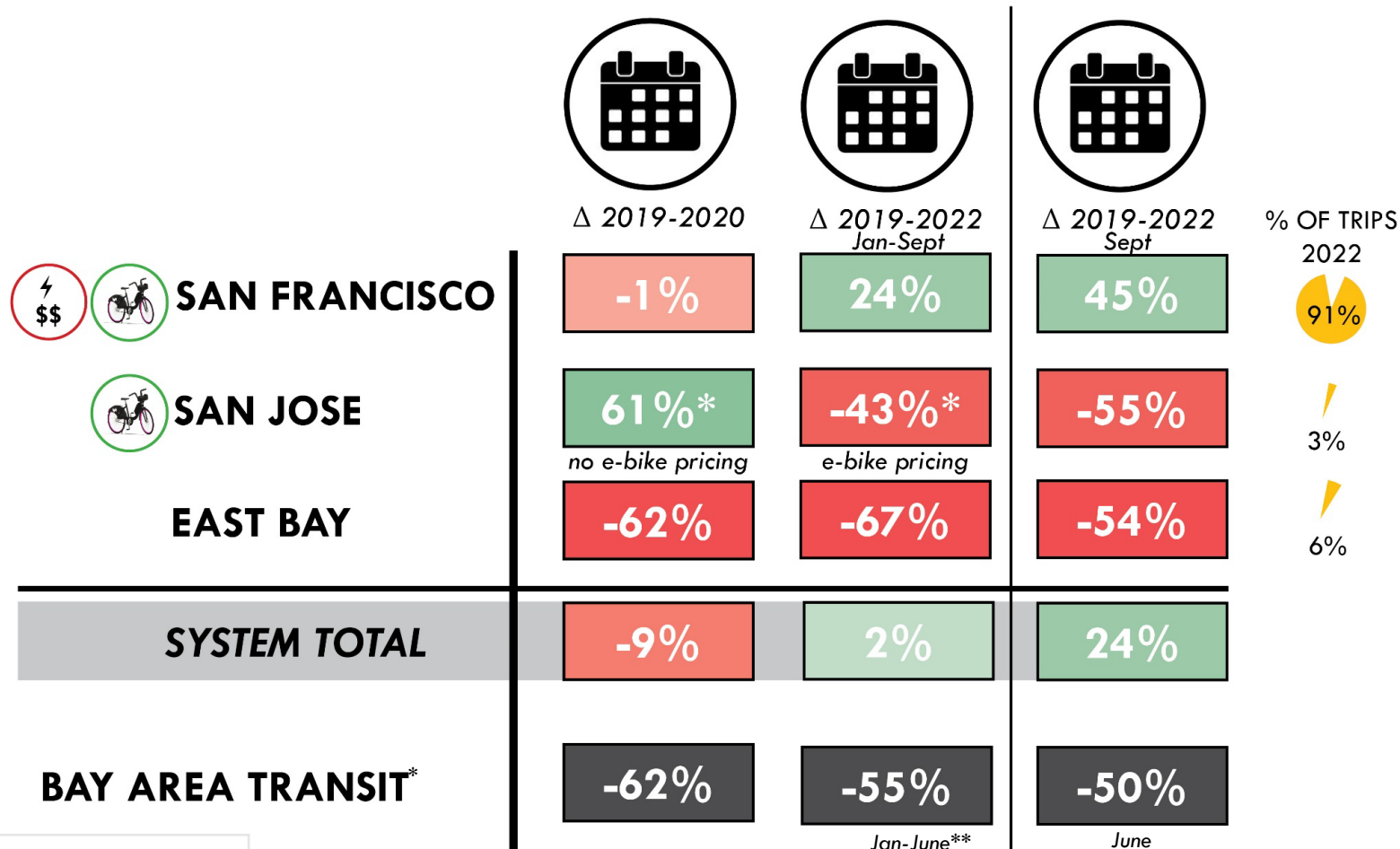
- Convene regular meetings with Cities & Lyft
- Track KPIs
- Assess Liquidated Damages



*Slow deployment of stations in San Francisco is in part due to the City's delays in siting stations.

Note: Fleet size is shown as an average for 2022; Lyft is fined if fleet size is below 90% of the contractual requirement; stations as of October 2022

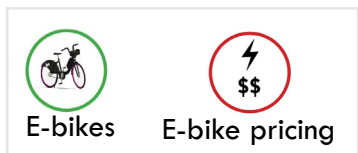
Ridership returning in SF; East Bay and San Jose down for various reasons



- SJ added premium pricing to e-bikes in April 2022, ridership decreased and shifted to classics
- System at 2019 levels due to SF (which is 91% of ridership), East Bay and San Jose ridership has not returned similarly

*Petaluma Transit, Union City Transit and Vacaville City Coach are not included due to insufficient data

**Bay Area Transit data shown in 2022 Jan-June as June is the most recent full month of data for all transit providers



E-bikes popular and well utilized in SF & SJ

Uncoordinated deployment left out East Bay

E-BIKES

- E-bike trips now make up **65% of trips in 2022**
 - SF: 70% of trips are taken on e-bikes
 - 49% of fleet is e-bikes
 - SJ: 55% of trips are taken on e-bikes
 - 10% of fleet is e-bikes

UTILIZATION

- Utilization is low for classic bikes outside SF
 - 1.0 utilization means each bike is being used once a day*

	SF	SJ	EB
<u>Classic:</u>	1.0	0.1	0.4
<u>Ebike:</u>	2.5	1.3	(no e-bikes)



Top: Lyft launched new e-bikes in San Francisco and is testing new station hardware with hope that both will be more theft proof.

Bottom: Existing e-bikes and stations. Lyft has seen high theft of e-bikes, e-bike batteries and station hardware (mainly station batteries).

Part of Regional Transit Network

Bay Wheels 8th largest transit operator

Bay Wheels provided 11 million trips with no subsidy

Serves as last mile connection to regional transit:

- Pre-COVID many of the Bay Wheels stations with the highest ridership were next to regional transit hubs in SF: Caltrain, downtown BART stations, Ferry Terminal, and Transbay Transit Center

Clipper 2.0 may offer new opportunities for bikeshare and transit payment integration

Jan-June 2022 Ridership

Rank	Ridership	Agency	Rank 2019
1	53,361,521	SFMTA	1
2	20,403,858	BART	2
3	15,153,241	AC Transit	3
4	9,771,938	VTA	4
5	3,729,028	SamTrans	6
6	1,715,150	Caltrain	5
7	1,246,245	Marin Transit	9
8	1,225,025	Bay Wheels	11
9	992,665	GGBHTD	7
10	964,650	County Connection	8
11	782,542	WETA	10
12	546,392	Santa Rosa CityBus	13
13	498,169	Tri Delta Transit	12
14	484,577	MTC	22
15	452,700	LAVTA	14
16	305,115	SolTrans	16
17	284,270	WestCAT	17
18	271,191	Sonoma County Transit	19
19	230,280	Napa Vine	18
20	199,054	SMART	21
21	180,084	FAST	20
22	176,931	ACE	15
23	6,488	Bikeshare Capital Grant Program	-

Equity Focused Programs

- **Bikeshare for All**

- Bay Wheels low-income program
- \$5 first year, \$5/month after
- Low and capped e-bike fees
- 10.5% of all members are Bike Share for All members

- **Adaptive Bikeshare**

- Pilot for understanding accessibility needs
- MTC supported 6 months of pop-up accessible bicycle locations in Oakland and SF in partnership with Bay Area Outreach and Recreation Program (BORP)
- Regional Technical Advisory Committee (TAC)



Capital Bikeshare Program

Programs completed or unable to proceed; operators facing challenges



Fremont (HOPR):

- HOPR removed fleet (scooters and regular bikes) due to theft/vandalism issues.
- City and HOPR remain on good terms.



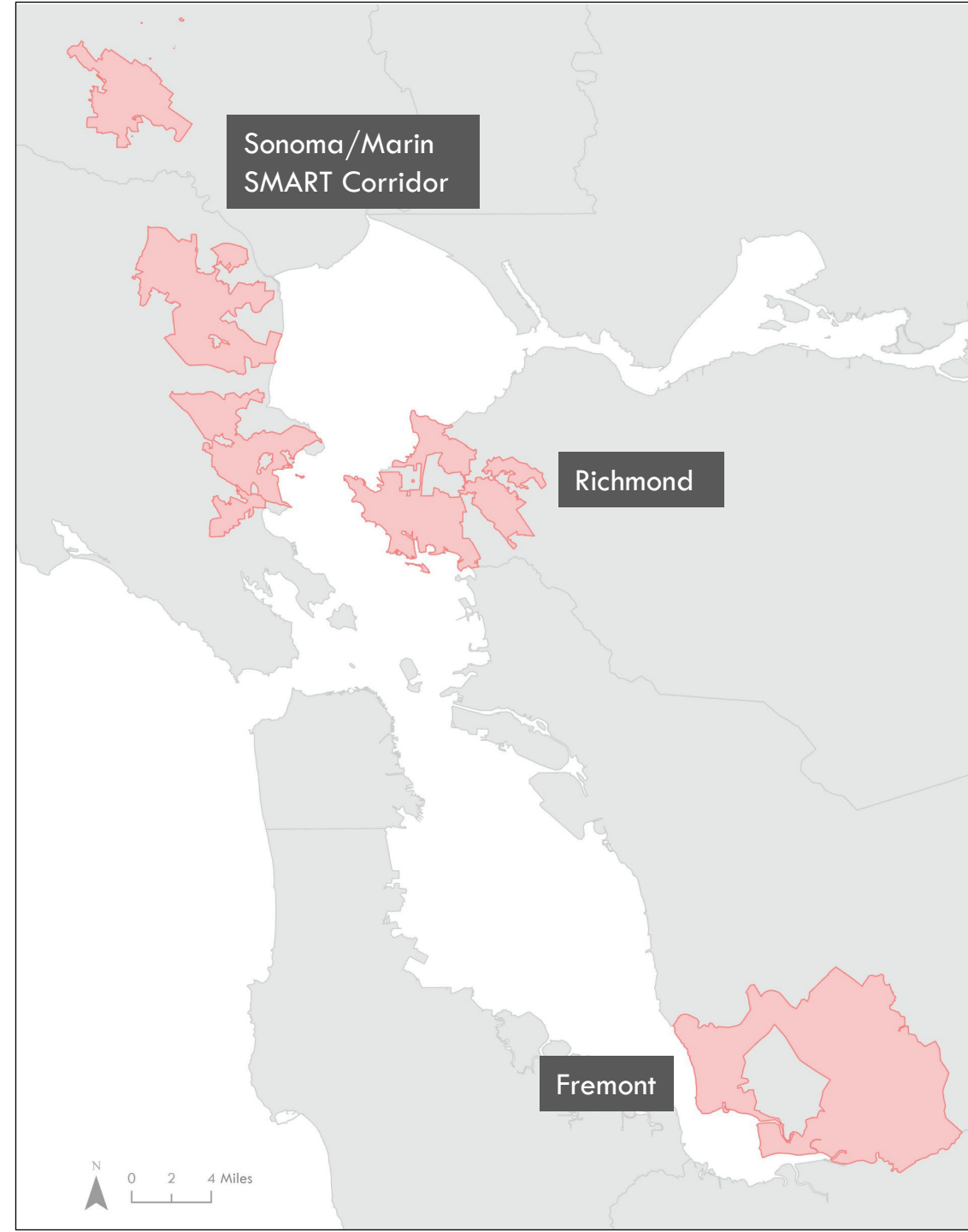
Marin TAM/Sonoma SCTA SMART Corridor

- \$826k in MTC funding (no funds used)
- SCTA/TAM are terminating contract with operator



Richmond:

- Launched June 2021 after COVID delays. System plagued by theft/vandalism and supply chain issues.
- MTC provided 1.024M for city staff and capital costs.
- Operator ceases operations in July 2022
- Temporary relaunch in September 2022 with same equipment and new operator using City funding.

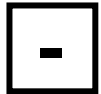


Key Findings



Bay Wheels Successful at Demonstrating Potential

- Shows bikeshare can play a role in regional transportation network. Especially with e-bikes, in dense urban areas, and as a last mile connection to regional transit.



Business Model Challenges Exacerbated By COVID

- E-bikes are more expensive and more costly to operate
- Theft and vandalism are greater in California adding to costs
- Regional bikeshare likely not financially sustainable without public subsidy



Opportunity to Shape Future of Regional Bikeshare

- \$0 contract has shielded MTC from financial risks during COVID
- Public investment likely necessary to sustain regional bikeshare and reach its potential

Next Steps

Bay Wheels Contract through 2027

- 3 years to plan & procure next phase

What strategies for public investment can improve system and prep for next contract?

How does bikeshare fit with MTC goals?

- Plan Bay Area 2050 (GHG and VMT reductions)
- Regional transit recovery
- Climate Initiatives
- Regional Active Transportation Plan

Based on feedback from committee, return in coming months with concepts for focused public investment

