

RIDE SHARE IMPACTS ON AIRPORT MODE SHARE

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2018 Texas/WesternITE Annual Meeting

New York Times
December 2017

Airports Are Losing Money as Ride-Hailing Services Grow



In response to a loss in revenue caused by ride-hailing services, some airports are trying to encourage people to drive and park. Boston's Logan International guarantees parking in a special area, above, for joining its Passport Gold program. *Kayana Szymczak for The New York Times*

By Amy Zipkin

Dec. 11, 2017



San Francisco Chronicle


December 2017

San Francisco Chronicle

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BIZ & TECH // BUSINESS

Ride-hailing, changing travelers' transportation habits, costs airports in lost fees

By Amy Zipkin | Dec. 13, 2017 | Updated: Dec. 13, 2017 5:54 p.m.



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A Retreat's Risky Lessons

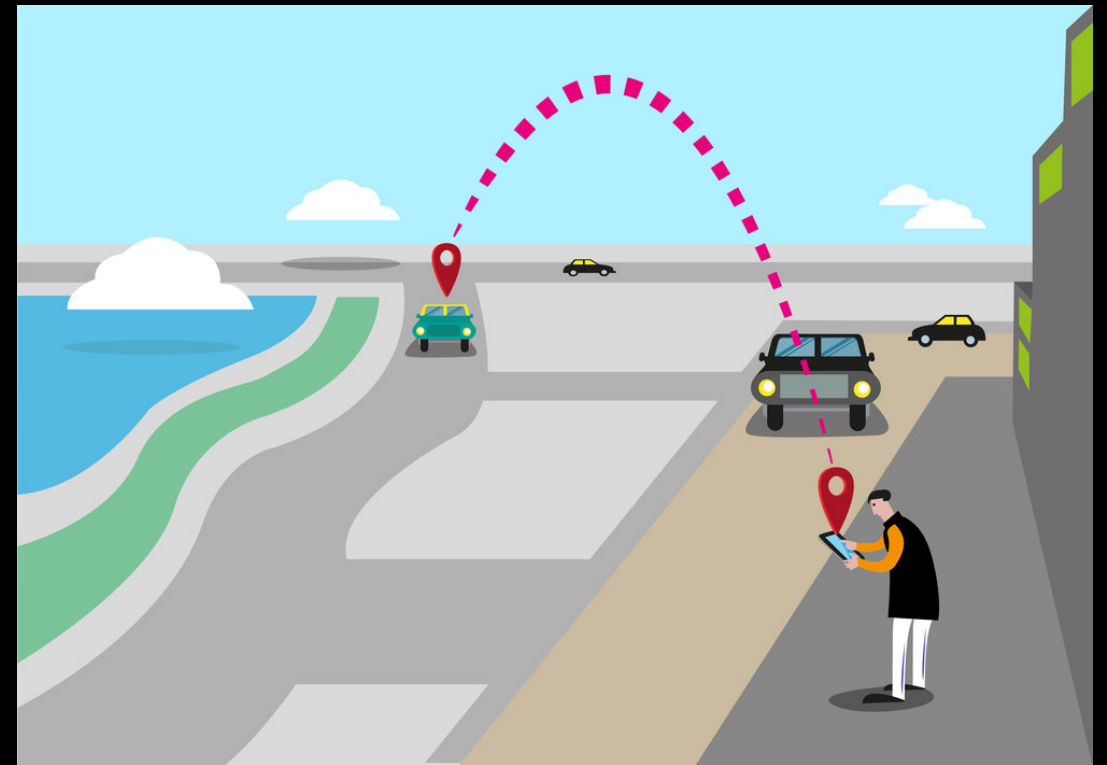
Tech firms love glass skyscrapers. Window washers are cleaning up

AGENDA

- Research into Mode Share Impacts at Airports
- Ridesharing Data Case Studies
 - Washington, DC (DCA)
 - Seattle, WA (SEA)
 - Portland, OR (PDX)
- What does it mean in terms of design going forward?

HISTORY

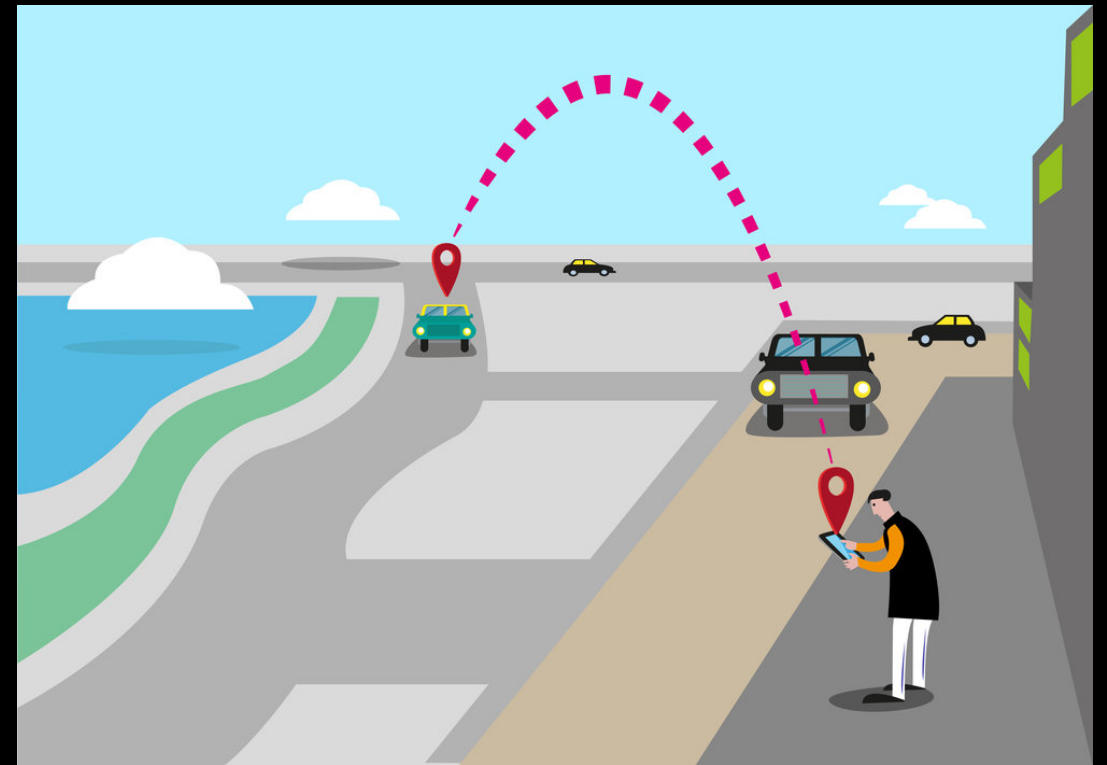
- 2012 - Initiated service
- 2014 - Nashville 1st airport with TNC agreement
- 2016 - Permitted at more than 90 airports
- Today - Few airports do not have TNC access
- Quick disruptor



HISTORY

- The Why

- Provide customer travel options
- Reliable
- Comfortable
- Convenient
- Cheaper



ACRP 84 SYNTHESIS 2017

- Drop off at same curb area for private vehicles (63%)
- Pick up at private or commercial vehicle curb space (85%)
- Airports most commonly charge \$2-\$4 per trip
 - 80% rely on self reported trip data to TNCs
 - Technology increasing
 - Medium Airports - \$500K to \$5M
 - Large Airports - \$1M to \$20+
- Half the Airports report increased congestion at curb



NOTE: Limited data set, InterVISTA, anecdotal



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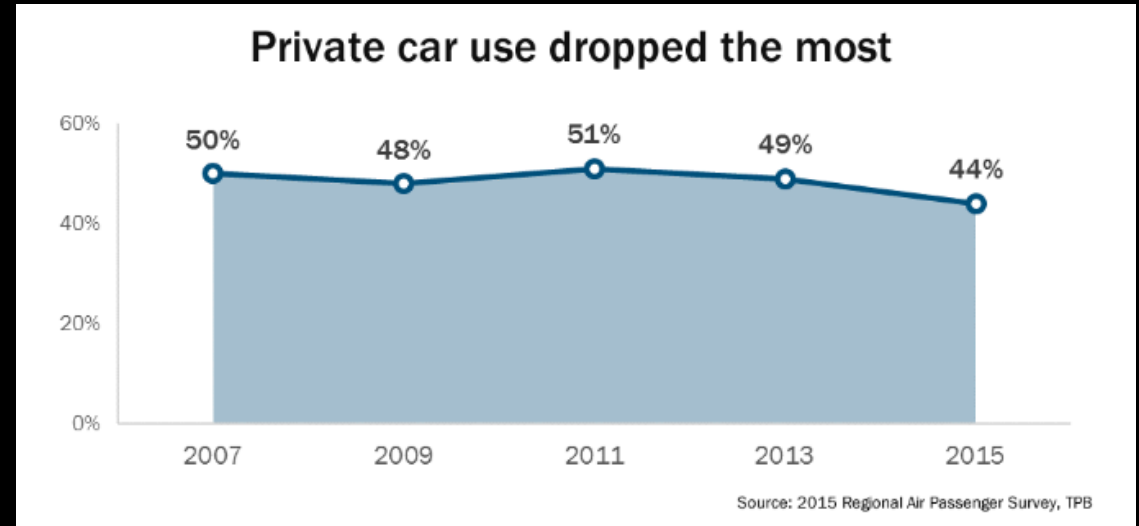
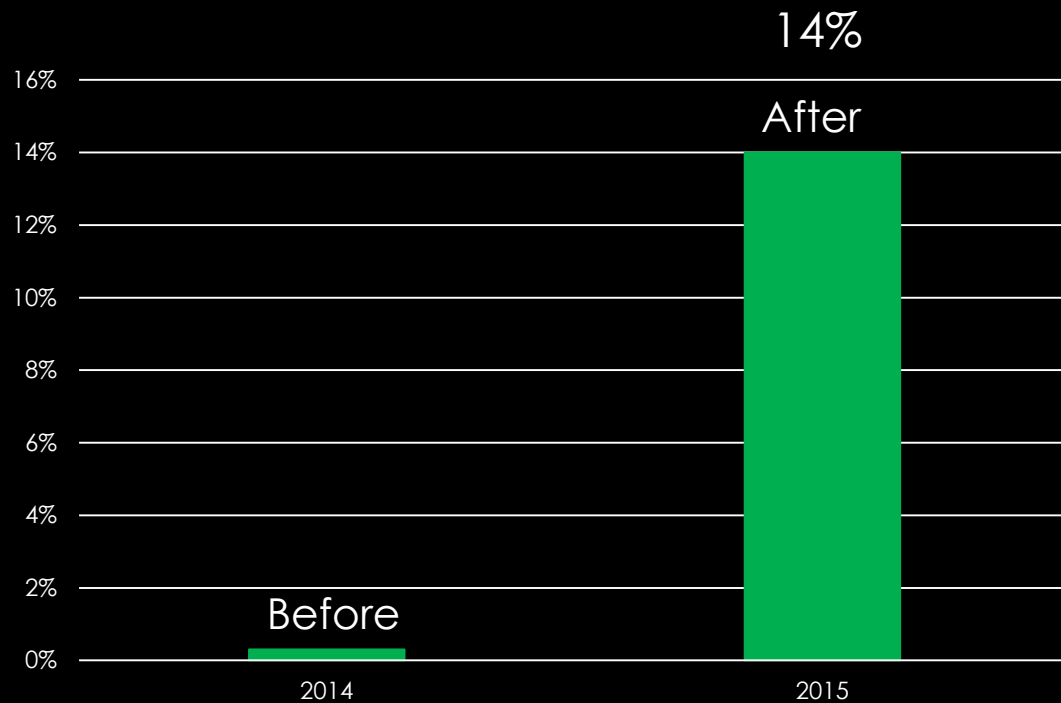
ACRP 84 SYNTHESIS 2017

- Mode Choice changes
 - Taxi - reduced 5%-30%
 - Shared Ride (vans) – reduced 18%-30%
 - Private vehicle – reduced 10-20%
 - Parking customers – reduced 5%-10%
 - Rental car transactions – reduced 13%
 - Limousine – little change



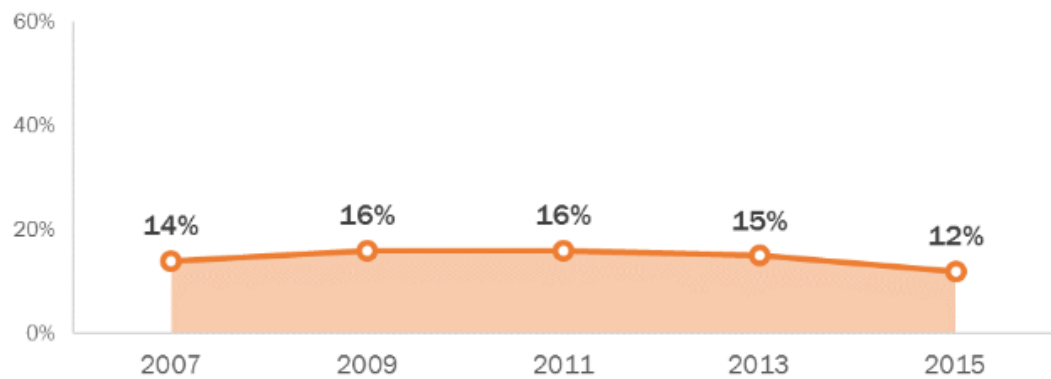
WASHINGTON DC – DCA AIRPORT

TNC Mode Share Change at DCA



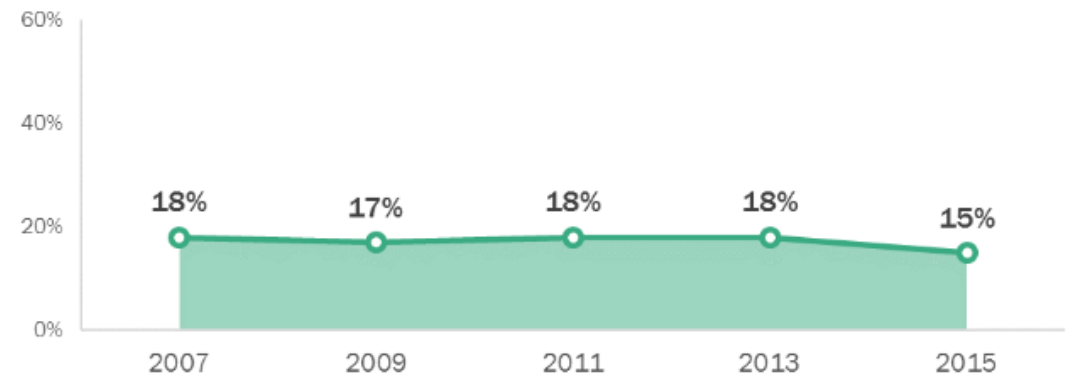
WASHINGTON DC – DCA AIRPORT

Metrorail use by DCA passengers fell to 12%



Source: 2015 Regional Air Passenger Survey, TPB

Taxi use dropped to 15%



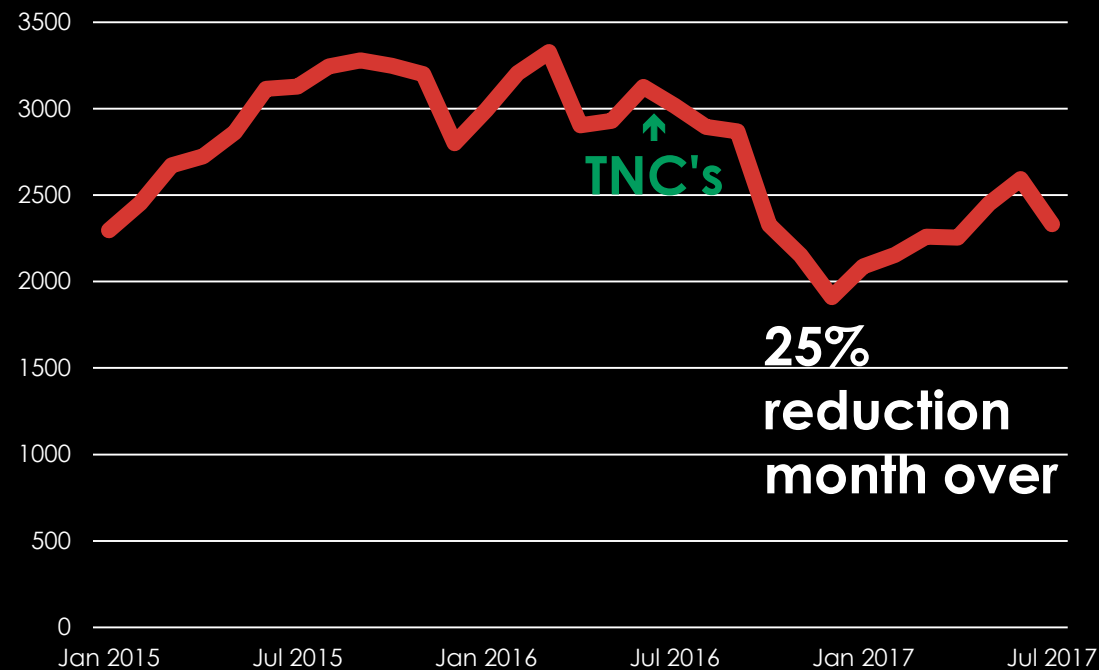
Source: 2015 Regional Air Passenger Survey, TPB

SEATTLE – SEATAC AIRPORT

SeaTac TNC Average Daily Trips

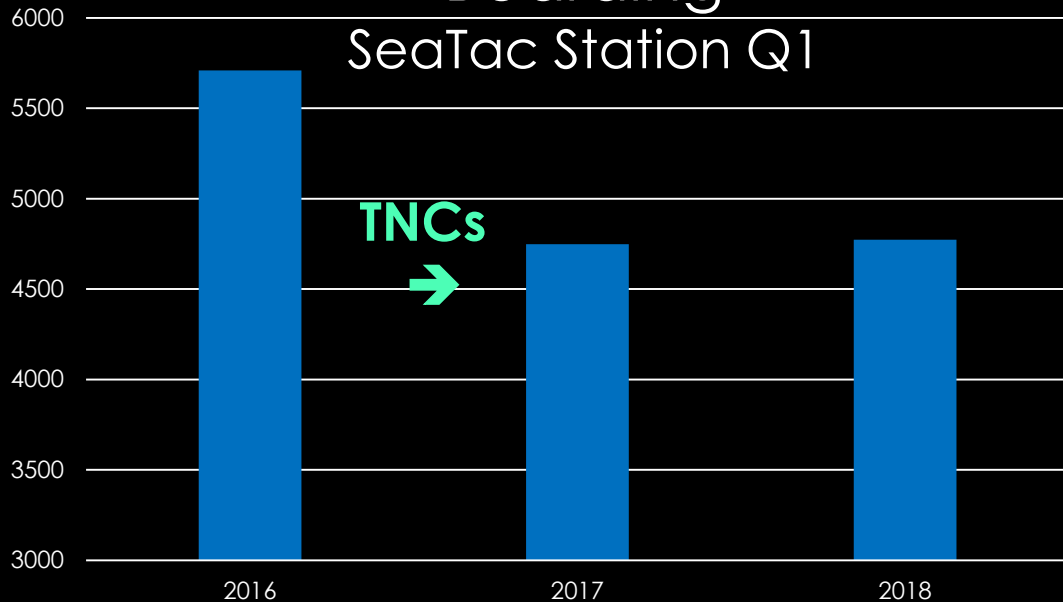


SeaTac Taxi Average Daily Trips



SEATTLE – SEATAC AIRPORT

Link LRT Average Weekday Boarding



- Compare last five months of 2015 & 2016

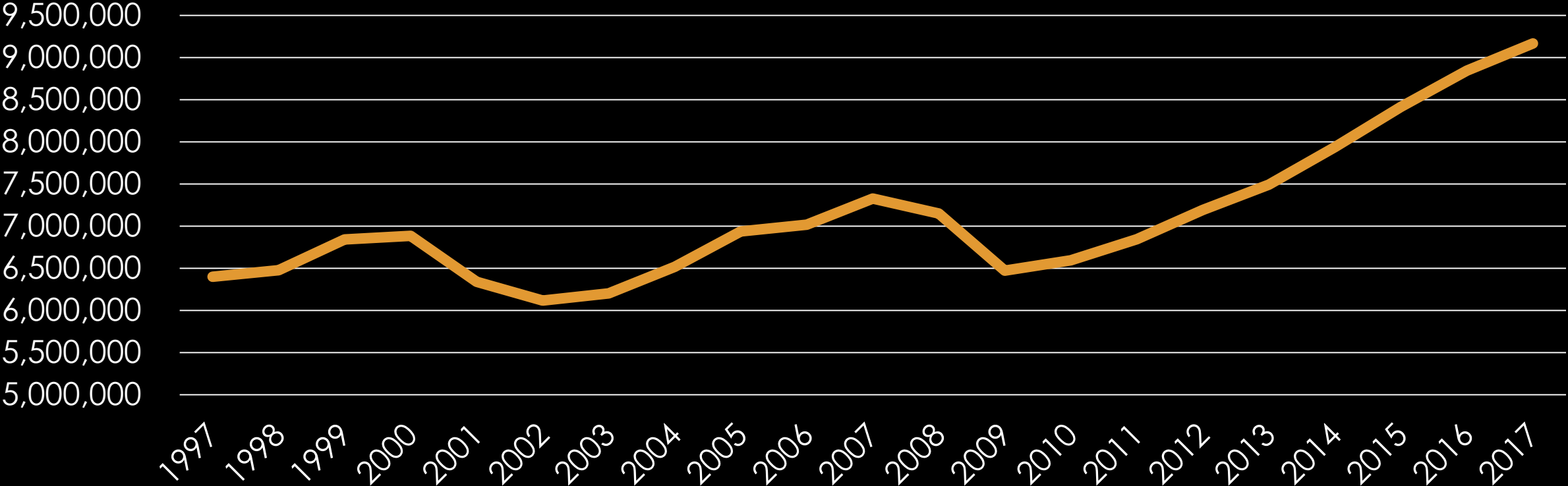
Ground Travel (less private auto) +20%

TNC's 160% of trip growth

Limos, Charters, Vans, Buses -5%

PORTLAND – PDX AIRPORT

PDX Annual Enplanements Passengers



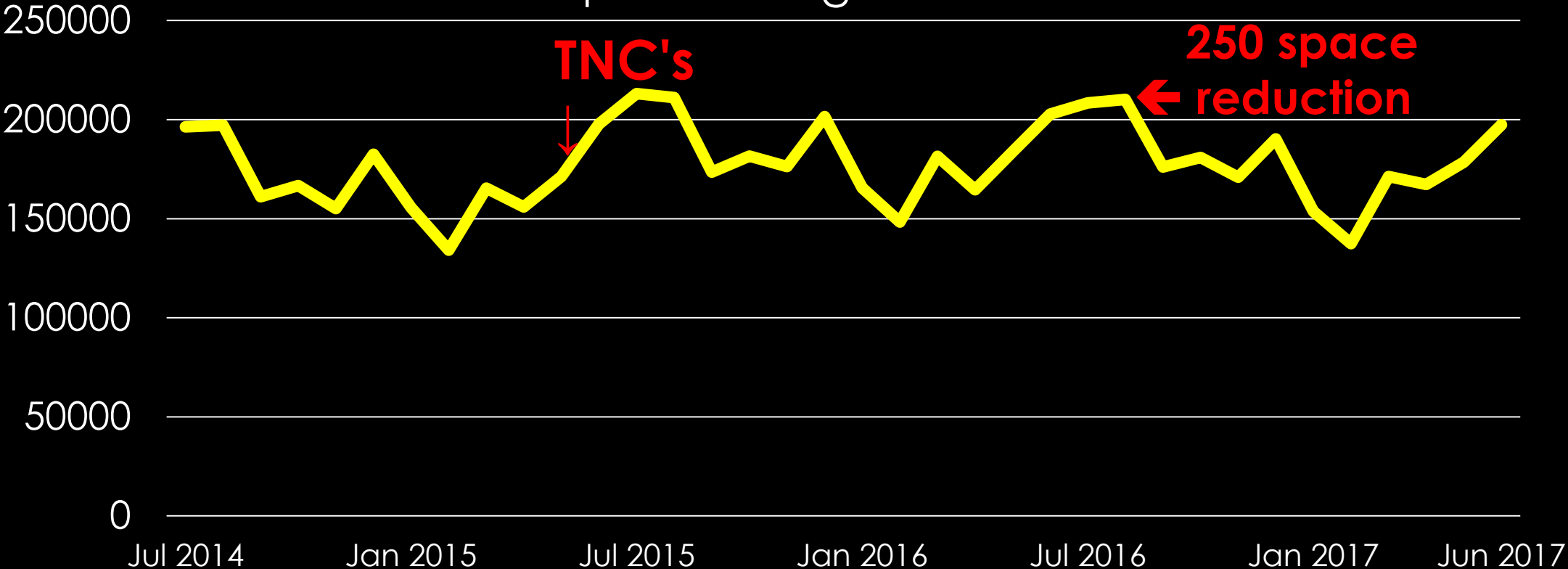
PORTLAND – PDX AIRPORT

TNC Transactions Monthly



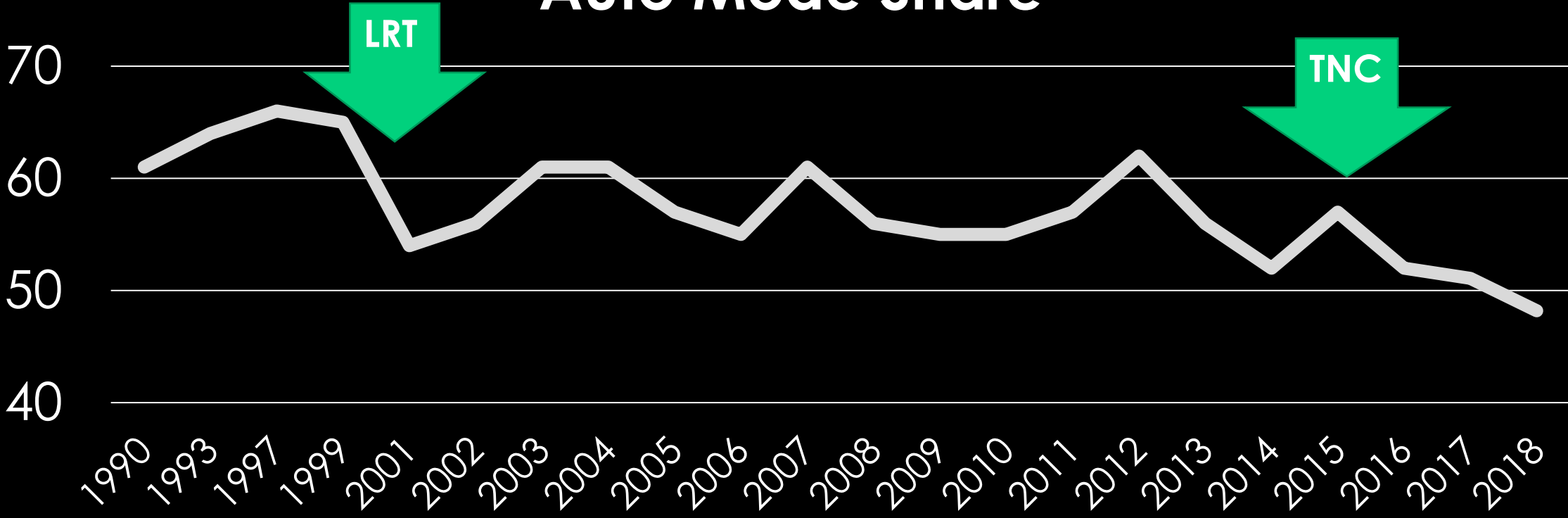
PORTLAND – PDX AIRPORT

Airport Parking Transaction



PORTLAND – PDX AIRPORT

Auto Mode Share

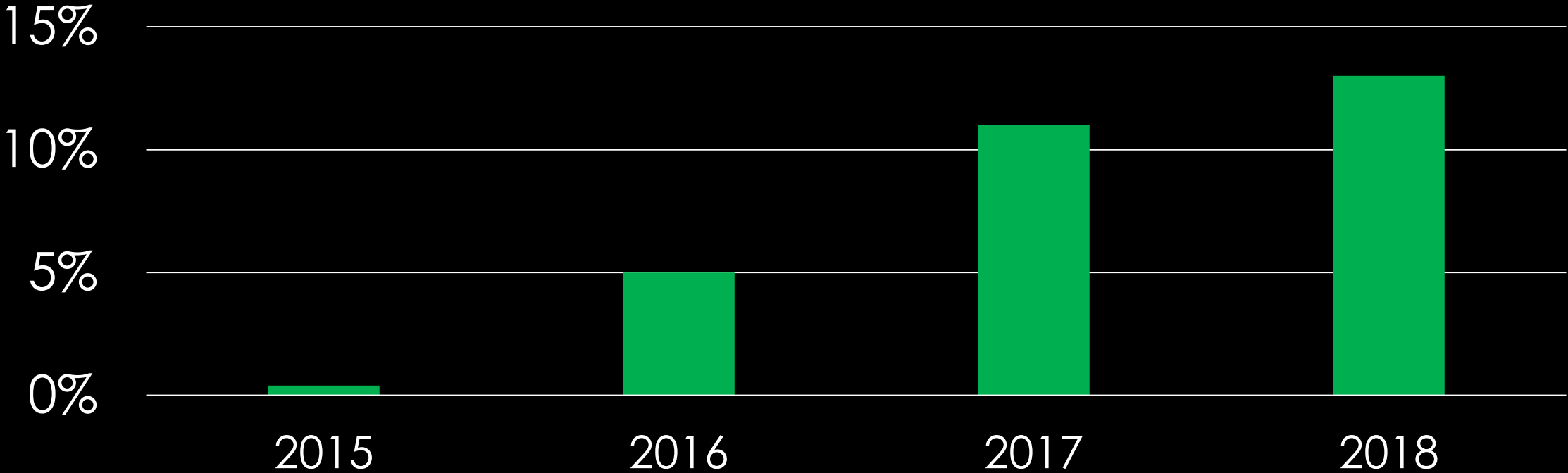


PORTLAND – PDX AIRPORT

Arrival Mode	2015	2018
Private vehicle, and was dropped off at the curb	40%	32%
Rental car	19%	20%
Private vehicle, and parked in PDX garage/lot	17%	16%
TNC: Uber	0%	13%
Light Rail	7%	6%
Taxi	5%	3%
Hotel Shuttle	9%	6%

PORTLAND – PDX AIRPORT

TNC Mode Share Growth



WHAT DOES THIS ALL MEAN?



- Curb space management is key
- Dropping off at the curb and pick up space are the most impacted
- Vehicle drops, taxi and shuttles are the next most impacted

WHAT DO YOU CALL IT?

Signs

- TNC
- Ride Sharing
- Ride Service
- Smartphone App Ride
- Ride Hailing
- Brand Names



CURB MANAGEMENT

- Curb Space *Generation*
- Creation of curb zones
- Shared curb space
- Flex curb
- Precision in pick-up point
 - Side of street
 - *Address number for every building*



Q's

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Barry Hennelly, Port of Seattle

