Shared mobility is a powerful tool that can help reduce transportation costs, lessen air pollution and expand access to jobs and opportunity.

EXPANDING SHARED MOBILITY FOR ALL

Urban mobility is changing faster today than at any time in recent history. The past year alone has seen a surge of new developments, from the launch of innovative first/last mile partnerships to the emergence of autonomous vehicles and the introduction of a first-of-its-kind challenge from the federal government to help cities rethink transportation.

Despite the great progress being made, however, in many cases the benefits of new services such as bikesharing, carsharing and ride-hailing still haven’t reached residents of every age, demographic and income level. And they have not yet scaled to their full potential.

The Shared-Use Mobility Center (SUMC) was established in 2014 to help address these concerns. Now in our second year*, SUMC has experienced the same rapid growth as the shared mobility industry. We have nearly doubled our staff, opened a second office in Los Angeles and launched several groundbreaking projects to help cities better understand and realize the benefits of shared mobility.

In the last year, our work included partnering with the Urban Sustainability Directors Network to launch a first-of-its-kind Shared Mobility Toolkit, completing a Transportation Research Board study to help shed new light on the relationship between shared mobility and transit, and working on an action plan to help tackle 100,000 cars off the road within the next five years in Los Angeles County. In addition, we’ve continued to work with our public and private partners to pilot new carsharing concepts in disadvantaged communities in Chicago and Los Angeles.

While we are proud of the progress we’ve made in just two short years, we also realize that much more must be done. We look forward to working with our partners in the year ahead to learn, experiment, innovate and help make our cities work – and move – better for everyone.

Sincerely,

Clayton
Board Chair, Shared-Use Mobility Center
CEO, Institute for Transportation & Development Policy (ITDP)

Sharon Feigon
Executive Director, Shared-Use Mobility Center

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*This report covers SUMC’s 2016 Fiscal Year, which began July 1, 2015 and ended June 30, 2016.
REALIZING THE BENEFITS OF SHARED-USE MOBILITY

Transportation has become the number one source of carbon pollution in the United States. It is the second largest expense for most families after housing. And lack of reliable access to a car, bus or train is one of the biggest barriers to employment for Americans today.

New forms of shared mobility – such as bikesharing, carsharing and ride-hailing – offer new opportunities to address some of the most critical issues facing society. In combination with public transit, shared mobility is a powerful tool that cities can use to help reduce transportation costs, lessen air pollution and expand access to jobs, opportunity and a better quality of life. But to fully realize these benefits – and to truly address poverty, climate change and racial inequities – these new modes must work for everyone.

That’s why the Shared-Use Mobility Center is focused on bringing together the public sector, private industry and local communities to forge partnerships, develop resources and advance new solutions. Together, we can reduce reliance on private automobiles and increase access to environmentally sound, cost-effective transportation options for all.

Our Goal: Take 1 million cars off the road over the next 5 years in 25 U.S. metro regions

We can reduce congestion and increase transportation options if just:

- 7% more of the population became transit commuters
- 3% more of the population joined bikeshare
- 6% more of the population became carshare members
- 7% more of the population started using carpools, vanpools, or ride-splitting

Together these additions would result in:

- 7 million fewer gallons of gasoline used annually
- 6 million fewer metric tons of greenhouse gas emissions annually
- 5 billion dollars in annual household transportation cost savings
OUR STORY

SUMC was founded in 2014 with first-year start-up funds from the sale of IGO CarSharing, a social venture that started at the Center for Neighborhood Technology and that first brought carsharing to the Chicago region. IGO’s CEO and founder, Sharon Feigon, now serves as SUMC’s executive director.

As a 501(c)(3) nonprofit organization, SUMC continues IGO’s mission to make it possible to live well without owning a car. We do that by bringing together a wide range of interests—including government agencies, private sector operators, community groups, and academics—to share best practices, conduct research, and serve as a testing ground to expand the public benefits of shared mobility.

HOW WE WORK

When it comes to shared mobility, there is no one-size-fits-all solution. While SUMC works with cities in a variety of capacities, our core areas of focus include:

- Serving as an information clearinghouse, with an emphasis on conducting innovative research with practical results
- Working with cities to test and scale new shared mobility concepts
- Fostering collaboration to generate new solutions and advance the public interest

We also draw on the deep operational knowledge of our staff to provide advice and expertise to cities and regions throughout the nation on an ongoing basis.

OUR THEORY OF CHANGE

SUMC’s theory of change starts with our vision of the future: an environment where it’s possible to access a variety of transportation choices regardless of geographic location, income level, or individual needs.

We can realize this future by aligning goals and metrics to measure progress; creating a culture that encourages healthy and environmentally sound behavior; identifying policy changes that encourage transportation that is cost-effective and efficient; and developing communities to support change and accountability.

We believe that public transit is the backbone of an efficient, equitable transportation system. Together, transit and other shared modes can create a robust ecosystem of options that support car-free and car-lite living and promote walking, biking, and other forms of active transportation.
SERVING AS A SHARED MOBILITY INFORMATION CLEARINGHOUSE

SUMC serves as an information clearinghouse to track new trends, document best practices and study issues critical to understanding and shaping the growth of the shared mobility industry. By conducting innovative research with practical results, SUMC works to help cities understand and leverage the benefits of this growing sector. In the past year, SUMC:

**Developed an interactive shared mobility toolkit for cities.** Working in partnership with 27 North American cities through the Urban Sustainability Directors Network (USDN), SUMC launched an innovative toolkit featuring a shared mobility policy database, online benefits calculator and mapping and opportunity analysis tool. The toolkit, which now includes information on more than 50 metropolitan areas, is designed to help cities expand shared mobility throughout their regions, including in disadvantaged communities where transportation options are lacking.

**Released a first-of-its-kind study on shared mobility and public transit.** Conducted on behalf of the Transportation Research Board (TRB), Transit Cooperative Research Program (TCRP) Report 188: Shared Mobility and the Transformation of Public Transit featured the first independent, multi-city evaluation of Uber trip data. The report, which garnered international attention, found that transit and new forms of shared mobility often complement one another, and that “supersharing” who use the widest variety of modes realize the greatest benefits.

**Created the industry’s first shared mobility reference guide.** SUMC developed a comprehensive reference guide to provide government, business and community leaders with an introduction to shared mobility and help prepare them to address the rapid changes currently taking place in urban regions across the nation. The guide includes definitions for new modes of shared transportation, analysis of changing local government roles and policy choices, and recommendations for growing shared mobility services in ways to better serve all residents.

**Developed a Shared Mobility Action Plan for Los Angeles County.** Created by SUMC with input from numerous regional stakeholders, the plan sets an ambitions goal – take 100,000 private cars off LA County roads in the next five years by expanding shared mobility and public transit – and provides recommended strategies, suggested funding sources and a prioritized roadmap for action.
Access to transportation is a civil right. Transit and shared mobility are vital to increasing access to jobs, opportunity and a better quality of life.

“Supersharers” Report Greater Transportation Cost Savings and Own Half as Many Cars as People Who Use Transit Alone.

In TCRP Report 188, SUMC found that people who are experienced with new forms of shared mobility own nearly half a car less than those who use transit alone. Vehicle ownership is even lower among “supersharers” — those that routinely use multiple shared modes — who own only 0.72 cars per household on average.

<table>
<thead>
<tr>
<th>USER TYPE</th>
<th>AVERAGE CARS PER HOUSEHOLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who use transit as their primary mode of transportation</td>
<td>1.50</td>
</tr>
<tr>
<td>People who are experienced with new forms of shared mobility</td>
<td>1.05</td>
</tr>
<tr>
<td>“Supersharers” who routinely use multiple shared modes</td>
<td>0.72</td>
</tr>
</tbody>
</table>

Supersharers (use the following)
WORKING WITH CITIES TO TEST SHARED MOBILITY

Cities must not be afraid to experiment, fail and iterate to find new transportation solutions that work for their residents. SUMC draws on the extensive operational background of its staff to support public agencies and local governments in their efforts to pilot innovative shared mobility programs and services.

Piloting Electric Vehicle Carsharing in Disadvantaged LA Neighborhoods
SUMC is working with the City of Los Angeles and a coalition of local community groups to support a first-of-its-kind pilot designed to reduce greenhouse gas emissions by introducing 100 electric carsharing vehicles and 200 charging stations into disadvantaged communities in Los Angeles. The project, which is powered by $1.6 million in funding from the California Air Resources Board and a $10 million investment from the private sector, was named to the Sustainia100 list of the 100 most innovative sustainability solutions from around the world.

Demonstrating Peer-to-Peer Carsharing in Chicago
SUMC is partnering with carsharing operator Getaround to study peer-to-peer carsharing in Chicago and test new marketing strategies to help expand carsharing in low-income and low-density areas of the city. The project is supported by a grant from the Federal Highway Administration and administered by the Illinois Department of Transportation and the Chicago Department of Transportation, along with additional funding from the Center for Neighborhood Technology.

PROSPECTIVE PROJECT BENEFITS

At scale, the pilot is expected to deliver the following benefits:

- 7,000 New Carshare Users Recruited
- 1,000 Private Vehicles Off the Road
- 2,150 Metric Tons of Annual CO₂ Emissions Reduced (approx.)
FOSTERING COLLABORATION TO ADVANCE SHARED MOBILITY

As the only national organization focused exclusively on shared mobility, SUMC brings together a diverse array of stakeholders – including government agencies, private operators and community groups – to generate new solutions, foster collaboration and advance the public interest. In the last year, SUMC conducted conferences, workshops and meetings in cities from coast to coast on issues related to ride-splitting, integrated mobility hubs, public transit and more.

2015 National Shared Mobility Summit
The 2015 National Shared Mobility Summit brought more than 500 participants to Chicago to discuss the latest developments in shared mobility and explore new solutions related to equity, use of public space, fare integration and more. SUMC also used the three-day conference, conducted in partnership with the North American Bikesharing Association’s (NABSA) 2015 annual meeting, to issue an ambitious goal to take 1 million cars off the road in the U.S. within the next five years by scaling up shared mobility.

Los Angeles Shared Mobility Workshops
With support from TransitCenter and the Hewlett Foundation, SUMC convened a series of workshops and meetings with transportation leaders in Los Angeles to dive deep on local issues related to ride-splitting, vanpooling, microtransit, bikesharing and more. Additionally, SUMC’s workshop on integrated mobility hubs, along with ongoing technical assistance, has been critical to reviving the region’s $8.3 million project to develop a series of multimodal transportation hubs in the LA area.

New York State Shared Mobility Summit
SUMC worked with Shared Mobility, Inc. and the New York State Energy Research and Development Authority (NYSERDA) to conduct a summit for local public and private sector representatives in Albany, NY to discuss transportation challenges and opportunities in upstate New York. As part of its work for NYSERDA, SUMC also conducted research on bikesharing in the region and completed a feasibility study to guide the launch of a new bikesharing system in the City of Rochester.
OUR FUNDERS

SUMC would like to thank our funders for their continued support. Organizations that helped to make SUMC’s work possible in the past year include:

**Foundations**
- The William and Flora Hewlett Foundation
- The McKnight Foundation
- TransitCenter

**Government Agencies**
- California Air Resources Board
- Federal Highway Administration
- New York State Energy Research and Development Authority (NYSERDA)
- Transportation Research Board

**Networks**
- Global Philanthropy Partnership

**Trade Allies and Summit Sponsors**
- Zipcar (Champion)
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- Bewegen
- Blaze
- CycleHop
- Carma
- GenZe
- Kranium
- Motivate
- NextBike
- Nissan
- PBSC Urban Solutions
- Shimano
- Smoove
- Scoot Networks
- Toyota
- Uber
- Velobility
- Via
- Vulog

**Statement on Our Independence**
All of SUMC’s research, positions, governance, programming, and products are the independent and exclusive work of SUMC. A financial relationship does not entitle any supporter to influence SUMC’s research agenda, organizational strategy or mission.

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Principal and Founder, MZ Strategies, LLC

Sharon Feigon
Executive Director, Shared-Use Mobility Center

SUMC Team: Left to right: Creighton Randall, Israel Ramirez, Tim Frisbie, Cassie Halls, Aaron Westling, Paula Bui, Sharon Feigon, Sarah Nemecek, Rani Narula-Woods, Colin Murphy, Albert Benedict, Mary Caron
THE YEAR AHEAD

SUMC is proud of our most recent accomplishments. However, we also have much more planned for the year ahead. Upcoming projects of note for 2016-2017 include:

- Setting mode shift goals and developing shared mobility action plans for Minneapolis-Saint Paul and other cities across the nation.
- Supporting the development of integrated mobility hubs in Los Angeles and Seattle, including creating a new framework to help cities invest in mobility hubs as a way to increase access to transportation.
- Convening shared mobility workshops in Minneapolis-Saint Paul, DuPage County, Illinois and other communities throughout the United States.
- Conducting webinars with the Urban Sustainability Directors Network to drill into pressing issues such as transportation equity and first/last mile solutions.
- Working with TransitCenter and the Federal Transit Administration to support the FTA’s Mobility On Demand (MOD) Sandbox program.
- Partnering with Leidos and the FHWA to conduct a global benchmarking study of shared mobility services in Europe.
- Conducting a study for the Transportation Research Board to explore the effects of UberPool, microtransit, tech shuttles and other forms of private transit in the U.S.
- Providing ongoing support for communities in California and in other areas of the country that are working to use shared mobility as a tool to mitigate greenhouse gas emissions and the effects of climate change.
- Building on TCRP Report 188 with a second phase of the project that will feature additional data sources, a greatly expanded survey sample and new analysis on travel behavior.

We look forward to working with all our partners to advance shared mobility in the months and years ahead.

SUMC brings together a wide range of stakeholders to help reduce reliance on private autos and increase access to environmentally sound, cost-effective transportation options for all.

To keep up to date on SUMC’s latest work, be sure to visit us online at sharedusemobilitycenter.org and sign up for our regular newsletter.
The Shared-Use Mobility Center (SUMC) is a public-interest organization working to foster collaboration in shared mobility (including bikesharing, carsharing, ridesharing and more) and help connect the growing industry with transit agencies, cities and communities across the nation. Through piloting programs, conducting new research and providing advice and expertise to cities and regions, SUMC hopes to extend the benefits of shared mobility for all.