



Impact of COVID-19 on Public Transit and Shared Mobility

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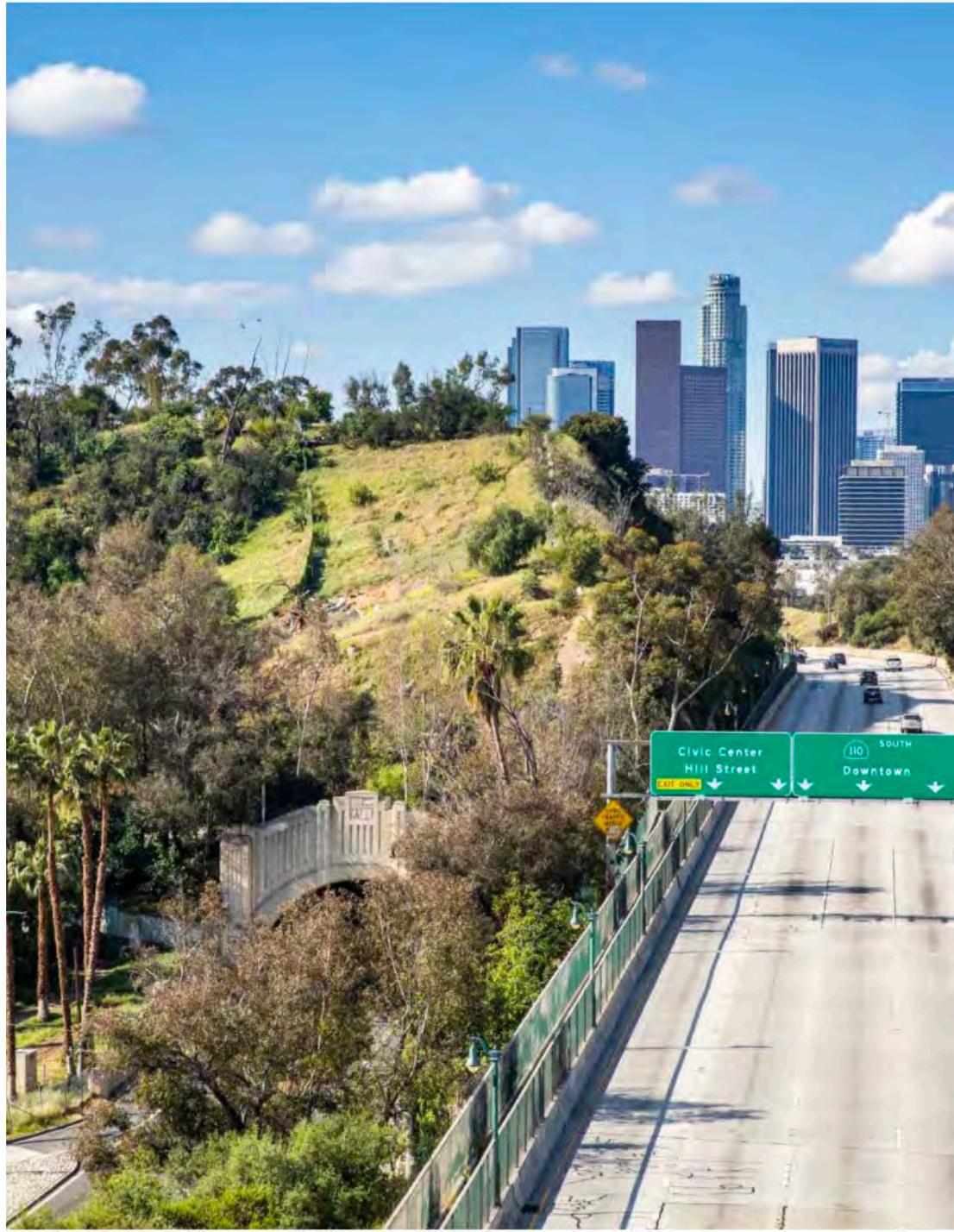
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Presentation Overview

- COVID-19 Challenges/ Opportunities
- Social Equity Considerations
- Public Transportation & Shared Mobility
- Trends & Possible Futures
- Navigating a New Normal





COVID-19 Crisis ...

- Economic recession causing devastating impacts on employment & transportation
- Gas tax revenue reductions
 - VMT down: 39% in Detroit, 39% Miami, 44% in Los Angeles, 49% in Dallas, 52% Seattle
- Public transit operators reduce schedules, routes, and operating hours
- Many drivers getting more reckless
- Shared mobility companies redirecting service, closures, and layoffs
- Need to quickly address immediate job and transportation impacts & restore



Social Equity Considerations

- Critical to understand inter-relationships among job and food access, housing, public health, and mobility
- Need to ensure lack of mobility does not exacerbate poverty and homelessness
- Opportunities for public transit operators, cities, and private companies to advance mobility needs and strengthen economic resilience, particularly for most vulnerable populations



COVID-19 Opportunities...

- 6% drop in CO2 emissions predicted in 2020
- VMT and number of car crashes down
- Active transport policies:
 - Milan announces 22 miles of streets to be converted to pedestrian / bicycle space
 - Buenos Aires expanding active transportation infrastructure
- Opportunities for slow streets, telecommuting, shared mobility & public transit options
- Focus on policy, partnerships & people
- Create more equitable, innovative, sustainable & resilient transportation

Public Transit Impacts

- APTA forecasts reduction in farebox revenue of 75% over next 6 months
- Public transit reducing schedules, routes, operating hours; social distancing, free transit/suspended fares
- Some increasing off-peak/low-density service gaps (e.g., Miami Metrobus/Go Nightly)
- Public transit agencies eligible to receive \$25B in emergency funding (CARES Act)





SOURCE: TRANSIT APP SURVEY APR. 2020

In-app survey (n=15K – US; n=10K – Canada)



SOURCE: TRANSIT APP USAGE, LOS ANGELES

TRANSIT APP SURVEY

- Active public transit users skewed toward low-income households
- Food service & healthcare represent greatest percentage of travelers
- Very little mode shift for those still traveling (U.S. and Canada)
- Spanish speakers more likely to continue using public transit (i.e., Los Angeles)

Rebuilding Trust in Public Transportation



PUBLIC TRANSIT DECLINE

- Public transit likely slower to recover as travelers exercise social distancing & fear higher-occupancy modes
- More likely if COVID-19 has multiple waves (e.g., resurgence in infections, new viral



PUBLIC TRANSIT RENAISSANCE

- Ridership increases due to economic hardship and restructured services
- Innovations and bold policy measures (e.g., free transit and subsidies, microtransit options)



Micromobility Impacts Varied

- In NYC, Citi Bike ridership increased 67% compared to March 2019
- Washington, D.C.'s CaBi expanding low-income access to \$5 annual memberships
- Notable layoffs (e.g. , Bird, Lime, Jump)
- In Mid-April, Lime suspends all service except South Korea
- Number of companies enhancing cleaning procedures (e.g., NanoSeptic handlebars)

Micromobility: Policy Response

Favorable Developments

- Free/discounted memberships/use for *small businesses and/or public* (Kansas City, Memphis)
- Free/discounted memberships for *essential workers* (Boston, Brookline, Chicago, Salt Lake City, Washington DC)
- Shared micromobility service workers deemed *essential* (Baltimore)
- Used for *restaurant deliveries* (Syracuse)

Unfavorable Developments

- *Ban/ceased operations* due to COVID-19 transmission concerns (Miami, Sacramento)



TNCs & Pooling

- Dramatic usage declines
- Partnerships for essential workers and medical appointments
- In mid-March, Lyft and Uber suspend pooled ride options due to COVID-19 transmission concerns



Trends: Current and Possible Futures



Macroeconomic Environment

	Pandemic Response (6-24 Months)	Recovery (~2-3+ Years)	Mitigation	Preparation
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	<ul style="list-style-type: none"> - Disruptions to supply chains and labor - Lower oil prices 	<ul style="list-style-type: none"> - Stronger recovery in public transit and shared mobility service sectors (e.g., TNCs) - Oil prices return to pre-COVID ranges 	<ul style="list-style-type: none"> - Auto and mobility sectors increase use of automation in supply chains - Monitor infectious diseases 	<ul style="list-style-type: none"> - Enhanced cleaning protocols - Continuity of operations and continuity of mobility/delivery plans
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Consumer Behavior

	<ul style="list-style-type: none"> - Shifts away from higher occupancy modes; increases in deliveries and telecommuting 	<ul style="list-style-type: none"> - Uncertain / depends on length/depth of pandemic and recession; policy levers 	<ul style="list-style-type: none"> - Consumers continue social distancing and physical travel substitution 	<ul style="list-style-type: none"> - Consumers prepared for future outbreaks (masks, gloves, social distancing, etc.)
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Policy Environment

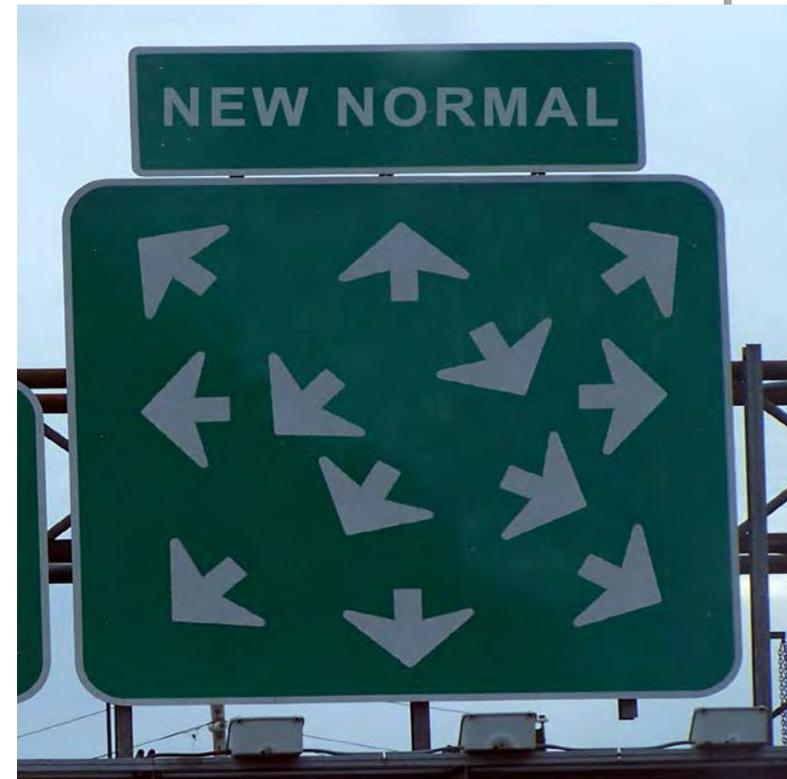
	<ul style="list-style-type: none"> - Economic stimulus - Support for public transit, telecommuting 	<ul style="list-style-type: none"> - Policies to reduce VMT/GHG emissions (e.g., telecommuting, HOVs, active transport) 	<ul style="list-style-type: none"> - Transport sector implements practices to prevent infectious disease 	<ul style="list-style-type: none"> - Transport sector implements practices to respond to infectious disease (e.g., increased cleaning, etc.)
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Technology

	<ul style="list-style-type: none"> - Testing AVs for 	<ul style="list-style-type: none"> - AV adoption delays 	<ul style="list-style-type: none"> - Industry develops 	<ul style="list-style-type: none"> - AVs ready for future
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Navigating A New Normal

- Turn crisis into opportunity
- Key role for public policy (e.g., public transit finance, telecommuting, micromobility)
- Focus on *people's needs central to response*
- Maximize social & environmental benefits in transportation recovery, particularly *social equity*
- How can shared mobility help households that are no longer able to afford a personal vehicle?
- Understand impacts/opportunities for taxi /TNC drivers who have invested in





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THANK YOU

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