

INVENTORY OF SHARED MOBILITY SERVICES IN THE DAYTON REGION

According to the U.S. Department of Transportation (USDOT)'s *Shared Mobility: Current Practices and Guiding Principles* primer, the shared use of a vehicle, bicycle, or other mode is an innovative transportation strategy that enables users to have short-term access to transportation modes on an "as-needed" basis. Today, through information and communication technology (ICT) and other technological innovations, travelers can:

- Request a private driver and vehicle via a smartphone app (e.g., Uber and Lyft, also known as transportation network companies (TNCs) or "ride-hailing" services)
- Access a car, bicycle, or scooter for a short trip (e.g., Zipcar, Link, Spin)
- Ride a private shuttle on a crowd-sourced route or on-demand (microtransit)
- Receive fast shipments of goods and cargo through last-mile logistics and courier network services (e.g., Amazon Flex, Lasership, Uber Freight)
- Have groceries or take-out food delivered in someone's personal vehicle (e.g., Instacart, UberEATS, Doordash)

Shared mobility will continue to evolve and develop. In light of this evolution as the menu of shared mobility options continue to grow, the public sector needs to respond with appropriate legislation to protect public safety and provide guiding policies to maximize benefits. Ongoing tracking and more research is recommended on emerging services such as TNCs, microtransit, dockless bikes and scooters, logistics and courier network, as well as food delivery services to support sound planning and policymaking in the future. The table below summarizes some of these technology-enabled transportation services in the Miami Valley Region.

TYPE	COMPANIES	DESCRIPTION / USE	SERVICE IN MIAMI VALLEY REGION?
RIDE HAILING	UBER, LYFT	<ul style="list-style-type: none"> o Uber is a digital technology platform, operating internationally, that connects riders with drivers, who both have to register with Uber. o Lyft is similar to Uber, but operates only in the U.S. and Canada. o Riders have their credit card information on file, so no cash is exchanged (although drivers accept tips). When a ride is requested, the nearest available driver hears a "ping" on their smartphone. If they accept, the rider is given the name of the driver, type of vehicle, license plate number and a photo of the driver. o Public Utilities Commission of Ohio issues a "Transportation Network Company (TNC) permit" to both Uber and Lyft to operate in Ohio, in addition to a \$5,000 annual permit fee. 	<ul style="list-style-type: none"> o Yes; Uber began service in August 2014 while Lyft began service in December 2016. o Uber pays an annual fee of \$8,500 to operate in the city of Dayton, including the airport. (Dayton Daily News (DDN) 2015) o Both Uber and Lyft pay \$2 a ride to the Dayton International Airport.
CAR SHARE	ZIPCAR	<ul style="list-style-type: none"> o A car-sharing network on campus, Zipcar (a subsidiary of AVIS Budget) allows users to drive a variety of cars on demand, by the hour or the day, around campuses, cities and airports worldwide. o Available daily 24x7 for students, faculty and staff ages 18 and older, as well as local community members ages 21 and over. o Zipcar vehicle rate includes gasoline, insurance, a reserved parking spot, and upto 180 miles driving per day; Additionally, there is an annual membership fee (after the first year) of \$35. o Both WSU and UD initially offered 2 Zipcar vehicles each to be placed on campus (DDN 2016) o Wright State members can join for \$25, with rates for Zipcar vehicles on campus starting as low as \$7.50 per hour and \$69 per day. 	<ul style="list-style-type: none"> o Yes; Zipcar began service at Wright State University and University of Dayton in March 2014.
BIKE SHARE	LINK	<ul style="list-style-type: none"> o Greater Dayton RTA partnered with the City of Dayton, Miami Valley Regional Planning Commission and Bike Miami Valley to launch Link, a docked bikeshare system, in 2015. o Dayton residents can pay \$70 for an annual membership, which provides unlimited 30-minute rides on any of the 225 bikes available in the Link system (daily and monthly memberships are also available). o Members unlock a Link bike with their smart card or with a smartphone app. o The RTA subsidizes Link with about \$250,000 in funding per year. o In 2020, RTA plans to add 100 e-bikes to the Link network. o In 2020, Link will also be transitioned away from a docked bikeshare model toward one that gives riders more flexibility with an expanded deployment of standard bicycle racks. 	<ul style="list-style-type: none"> o Yes; LINK was launched in Dayton in 2015. o In 2019, Link provided approximately 30,000 trips.
ELECTRIC SCOOTERS	SPIN	<ul style="list-style-type: none"> o City of Dayton partnered with Spin and Greater Dayton RTA to launch Spin e-scooters in Dayton in 2019. o City of Dayton developed regulations to legalise e-scooters while RTA introduced requirements for Spin to integrate with it's Mobility as a Service (MAAS) multimodal platform. Spin pays RTA to rebalance, recharge, and maintain its e-scooter fleet in Dayton. o Spin provides data to the City of Dayton about utilization and trip origins and destinations. o The City bans scooters from being ridden between 9 p.m. and 7 a.m. o Spin deployed around 150 scooters in August 2019, with another 75 added a month later. 	<ul style="list-style-type: none"> o Yes; Spin e-scooters were launched in Dayton in August 2019. o From August 2019 through mid-January 2020, over 20,000 trips were taken on Spin's e-scooters in Dayton.
FREIGHT	AMAZON FLEX, UBER FREIGHT	<ul style="list-style-type: none"> o Founded in 2015, Amazon Flex is an on-demand package "last-mile" delivery service that hires drivers to deliver packages to Amazon customers around the country quickly. o Drivers tell Amazon which days and hours they would like to work, then Amazon assigns them a shift or a "block". o Drivers then pick up items from their local Amazon warehouse and deliver them to people in the area during their delivery blocks. o There are several delivery types a driver can choose to make including Amazon Logistics (regular plus Prime packages), Prime Now (1-hr and 2-hr packages), Amazon Fresh (grocery deliveries by same or next day), and Amazon Restaurants (similar to Postmates and Doordash). o Uber Freight, launched in 2017, is an app that matches professional truck drivers with shippers looking to transport big loads over long distances using technology drawn from Uber's ride-hailing app. Typically such trucking logistics have been coordinated through phone calls and emails. 	<ul style="list-style-type: none"> o Yes; Amazon began operations in it's last-mile delivery warehouse in Kettering Business Park in August 2019. o Initial service volumes are estimated at approximately 30,000 packages out of the facility per day (DDN August 2019). o Uber Freight launched in central Ohio in May 2017.
LAST MILE LOGISTICS	LASERSHIP, ROADIE	<ul style="list-style-type: none"> o LaserShip is a regional last-mile delivery company that services the eastern and midwest United States. o LaserShip handles deliveries for Amazon and others from New England to Florida, specifically Amazon's Same Day Service. o Roadie is a delivery service that connects people who need to send a variety of items with drivers heading in the same direction. o A sender with a package posts on Roadie's website or from the company's app. The posting includes a photo, a name, a description of the package, origin and time of pickup and the destination. Drivers already heading in that direction begin offering when they can pick up and deliver the package. Senders pick a driver from those offers. Pricing is determined by distance and urgency, in addition to the delivery. 	<ul style="list-style-type: none"> o Yes; As of 2018, LaserShip has 64 distribution centers and four sorting centers (including one in central Ohio). Packages are delivered in eastern and midwest U.S., including the Dayton region. o Roadie began service in central Ohio in 2016. o Delta Airlines has teamed up with Roadie to deliver luggage that has been delayed or misrouted at more than 50 U.S. airports including Dayton International Airport.
FOOD	UBER EATS, DOORDASH, GRUBHUB	<ul style="list-style-type: none"> o All on-demand food delivery companies accomplish the same goal of delivering food ordered from local restaurants to customer homes or businesses while the logistics varies depending on the services used. o To use the service, customers download the free company apps on their smartphone, where they can order food from selected restaurants, pay from it and track where the delivery driver is along the way. o Typically, each company might enter into agreements with some restaurant chains, but it does not limit delivery options to those business partners only. 	<ul style="list-style-type: none"> o Yes; Doordash started operations in Dayton is late 2017 followed by UberEats and then Grubhub in 2018.
GROCERY STORES	KROGER DELIVERY, WHOLE FOODS, DOROTHY LANE MARKET	<ul style="list-style-type: none"> o Certain grocery stores such as Kroger, Whole Foods Market and Dorothy Lane Market provide their own grocery delivery services. o Kroger charges \$9.95 for it's Delivery service whereby a customer places an online order and specifies a date and time window, can be as soon as an hour, for delivery. The order is picked by third party partners of Kroger and delivered accordingly. In addition, Kroger also offers storefront pickup of groceries through it's Pickup (formerly Click-List) service. o Whole Foods Market groceries can be shopped online and delivered through Amazon's 2-hour Prime Now service that includes delivery charges as part of the Amazon Prime membership fees. o Dayton region's local grocery franchise, Dorothy Lane Market stores, offer delivery through their Drive-Up program in addition to curb-side pickup service. There is a \$5.99 "shoppers fee" added to every order placed for curbside pickup, and a \$9.99 fee for home delivery. 	<ul style="list-style-type: none"> o Yes; DLM Drive-Up delivery service was launched in May 2017. o Whole Foods Market and certain Kroger stores in the Dayton region also offer home delivery of groceries.
GROCERY DELIVERY COMPANIES	INSTACART, SHIPT, AMAZON FRESH	<ul style="list-style-type: none"> o Instacart, Shipt, and AmazonFresh are among the biggest third-party operators in grocery home delivery in the United States. o These companies allow customers to shop online for groceries at their preferred grocery stores through their apps or websites and delivered to their homes for an annual or monthly subscriptions for their service, or a onetime user fee. o Each company has partnered with specific grocery chains and groceries from only the represented grocery chains can be purchased via the respective apps. o Third-party delivery is used by about 3 percent of grocery shoppers, according to U.S. Commerce Department figures and analysis by consulting firm Kan-tar Retail, a number that's expected to grow to 20 percent by 2025 (DDN 2017, 2018) Grocery delivery was a \$4.5 billion industry (DDN 2018), expected to increase by 12.5% annually and reach \$9 billion by 2022. 	<ul style="list-style-type: none"> o Yes; Instacart provides grocery deliveries from local Kroger and ALDI's stores while Target-owned Shipt delivers groceries from Meijer stores. Both services launched in 2017. o Amazon Fresh delivers groceries to Amazon Prime members for free if orders are above \$35.
MEAL DELIVERY KITS	KATE'S PLATE, SUN BASKET, HELLO FRESH, MARTHA & MARLEY SPOON, BLUE APRON, GREEN CHEF, PURPLE CARROT	<ul style="list-style-type: none"> o These companies provide meal delivery kits to customers who can choose from amongst different subscription plans, frequency and type of meals delivered at their door-step. o The meal kit service concept is fairly new, and only 19 percent of U.S. adults have tried a home delivery meal kit service like Blue Apron, Hello Fresh or Plated, according to data group Morning Consult. Of that group, 38 percent currently subscribe to a meal kit service. However 39 percent of those surveyed who have tried a home-delivered meal kit service used the service just once, and 26 percent used the service for less than a month, primarily because of the hefty expense. (DDN 2017). o Meal kits are a \$2.2 billion industry, which is expected to grow 25 to 30 percent in the next five years, according to consulting firm Pentallact. 	<ul style="list-style-type: none"> o Yes; Companies like Hello Fresh, Sun Basket, Blue Apron etc. ship meal kits nationwide while Kate's Plate is a local Dayton area meal delivery company launched in 2014. o Kroger also supplies meal kits under the Prep+Pared brand name which can be ordered through Delivery as well as ClickList service.