



# 2015 ANNUAL REPORT



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*"This year, Movability Austin helped us develop a mobility plan that will make our commute efforts more sustainable, and address our long-term growth and demands for parking. Meanwhile, our commute program has continued to grow. Movability connected NetSpend with other companies in the building, leveraging our proximity to offer even better options for all commuters. Individual NetSpend employees took advantage of Movability's commute concierge service to find tailored options that work best for them. One employee even took the '30 Days Off the Road' Challenge, only using commute options for the whole month!" —NetSpend*

Each day brings headlines heralding the arrival of a new era in transportation, one in which the individual is moving beyond the 20th century paradigm of car ownership and into a marketplace for mobility as an on-demand service. What this will look like in a few years is still emerging, but generally travelers will be able to use technology like mobile apps to set a time and location, in order to choose from the entire transportation system—shared automobiles, bicycles, shuttles, or other modes—to help you travel the way you need, when you need it. The incentive will be much cheaper transportation that is at least as convenient as your current options.

More flexible and connected work places, connected consumers, connected vehicles, and the platforms that power them mean individual travelers have new levels of transportation choice, greater insight into the real-time benefits and costs associated with these choices, and an enhanced engagement with their decision making that can provide new levers for improving individual outcomes and overall system performance.

It is not clear how this new era will unfold, but it will require rethinking policies, design and implementation of “build and they will come” transportation system to support rapidly evolving private sector initiatives and shifting user demands that truly seem to be driving the innovations. Movability Austin has been the early adopter and promoter for most of these new services and we are becoming an essential advisor as the public sector rethinks its role.





## TRENDS

*“Traveling outside of normal work hours was great, low stress, not as much traffic.”*

—Driving commuter

*“Telework was by far the best choice for me. I had flexibility and was much more productive.”*

—Teleworker

*“Mobility Week was my first time riding the rail, I figured I am an Austinite I had to experience it. Loved it.”*

—Rail commuter

There is growing consensus that the transportation status quo is untenable. By the numbers—whether the annual economic cost of congestion (\$121 billion), the health cost of air pollution (200,000 early deaths per year), the strain on public and personal finances, or simply frustration over how poorly traditional transportation is working for most people (76% of Austinites see traffic as a problem or severe problem)—it is not surprising that both consumers and providers of transportation are ready to embrace change.

Changes in the travel patterns and preferences of various demographic groups are feeding and reinforcing the inevitability of change. Americans of all ages (except 80+) are driving less, but the drop in per capita vehicle miles traveled is especially pronounced among the 73 million young adults aged 18 to 34. Surveys of these young adults reveal a preference for a less auto dependent lifestyle including more flexibility in when, where and how they work. There is evidence to suggest that this preference is especially high in higher income brackets and it will persist even as they enter new financial and life circumstances.

The transformation in travel coincides with the speed and ubiquity with which the wireless Internet, social networking sites, smartphones, consumer GPS and mobile applications have penetrated consumers' daily lives. The immediacy, trust and peer review that are the hallmarks of social media and social networking are now fundamental to many digital interactions across industries. They also play an increasingly central role in new transportation offerings.

### From Ownership to Access: Shared-Use Mobility

The shared-use mobility market is one of the highest-profile and most dynamic sectors of the sharing economy. Car sharing has seen exponential growth in the last five years; membership in services such as ZipCar and car2go has grown to over 1.3 million members in the United States. The growth of on-demand ride services, including TNCs like Uber and Lyft, has been swift and expansive.





## TRENDS CONTINUED...

### ACTION NEEDED

- A greater understanding of environmental impacts
- Any induced travel effects and how these services impact transit, traffic
- Parking would be valuable to integrating and improving the transportation system

### Enabling Travelers to Choose

For individuals to choose and use “on-demand” transportation services, they must have the ability to take a trip that meets their time, cost or experience parameters, and the system must be able to dynamically manage those trips.

Mobile apps like RideScout already provide options for integrated trip planning and that app, as well as Capital Metro, provides mobile payment options. RideScout is also working with Capital Metro and other service providers to share real-time information. Applications increasingly incorporate crowdsourced data in addition to official data, and the result is a dynamic, collaborative environment of real-time information flow between travelers.

### ACTION NEEDED

- Daily commuting behavior is predictable and offers opportunities for greater optimization, such as incentivizing peak shifting and mode shifting by applying concepts from behavioral economics and gamification.
- Much more collaboration is needed between the public and private sectors to view mobility on demand services as an alternative to car ownership.
- Stakeholders from outside the transportation industry have an important role to play in facilitating better system outcomes. For example, large employers could focus on transportation demand management strategies or policies that improve employees' transportation choices.
- What nudges people into different transportation modes or changes their transportation patterns is under-researched.



# OUR COMMUNITY AT A GLANCE

**40%** of Austinites spend more on transportation than on housing.

## Driving Alone is Expensive for Everyone

\$2,641 tax dollars/year per household:  
Public Infrastructure and Operations  
\$1,800 a year per employee:  
Businesses (downtown) Parking  
\$12,369 a year per household:  
Personal Transportation by Car

Currently 75% of commuters drive alone

## Commuters Using Options Pay a lot Less for Transportation



Bus: \$1,262/year per household



Rail: \$2,938/year per household



Bike/Walk: \$450-\$1,100/year per household



Rideshare: \$2,592-\$5,510/year per household

## In the future, on demand travelers will make transportation less expensive for everyone

\$2,165 tax dollars/year per household:  
Public Infrastructure and Operations  
\$1,800 Businesses can reinvest parking savings  
per employee into other benefits  
\$3,062 a year per household:  
Personal Transportation by Car

40% or more travelers expected to use  
On-Demand Transportation

## DOWNTOWN GROWTH

**130,000** people will be working downtown  
by the year 2020

**28.8%** of Austin-area jobs are in the  
Central Core

**34%** new job growth rate is one of the highest  
in the country and out paces anywhere else  
in Central Texas

## DOWNTOWN MOBILITY INDICATORS

By **2035**, time spent in traffic will triple if  
most commuters continue driving alone at the  
same times.

With **40%** of commuters using on-demand  
transportation, roadways into downtown could

have **60%** less traffic.

## Downtown has never had so many mobility options.

**Austin B-Cycle** provided at least **10%** more  
trips than last year, with **50** stations in and  
around downtown.

The **Car2Go** Austin fleet has over **350**  
vehicles used by **56,000** members.

The **Zipcar** Austin fleet has **45** vehicles, and  
membership has grown by **13%** this year.

**Carma** connected over **3,000** Austin-area  
users with carpool options.

We also have new bike rentals, pedicabs, taxi  
cabs and TNCs (Uber & Lyft), and at least half  
a dozen shuttles operating in downtown at any  
given time.



# MOVABILITY AUSTIN'S ROLE

A future with 40% of commuters using mobility options is a bigger challenge than any one sector can accomplish. But together we have already made significant progress towards the 20% tipping point. Movability is working with the City, Capital Metro, and others for the infrastructure improvements that enable commute choices. We are also working with the Chambers of Commerce, Downtown Austin Alliance, individual businesses, and private sector companies to promote innovations and changes that allow more commuters to find and use mobility options.



*“The Mobility Challenge consulting team helped us understand how our employees commute and what alternatives they are interested in. They also helped us think about the long-term to form goals and build realistic action steps that align mobility with our priorities. This plan enables UFCU to strengthen our competitive advantage through attracting and retaining the best employees; and serve as a positive role model in the community. Movability Austin even helped us jump into implementation with a well-attended ridesharing event that matched potential carpool groups, and provided valuable tools for employees to start trying commute options.”*

—University Federal Credit Union

*“I tried carpooling during Mobility Week and it was different. It made the commute seem faster because we talked most of the way, but it did make for a little trip out of my way.”* —Carpooler

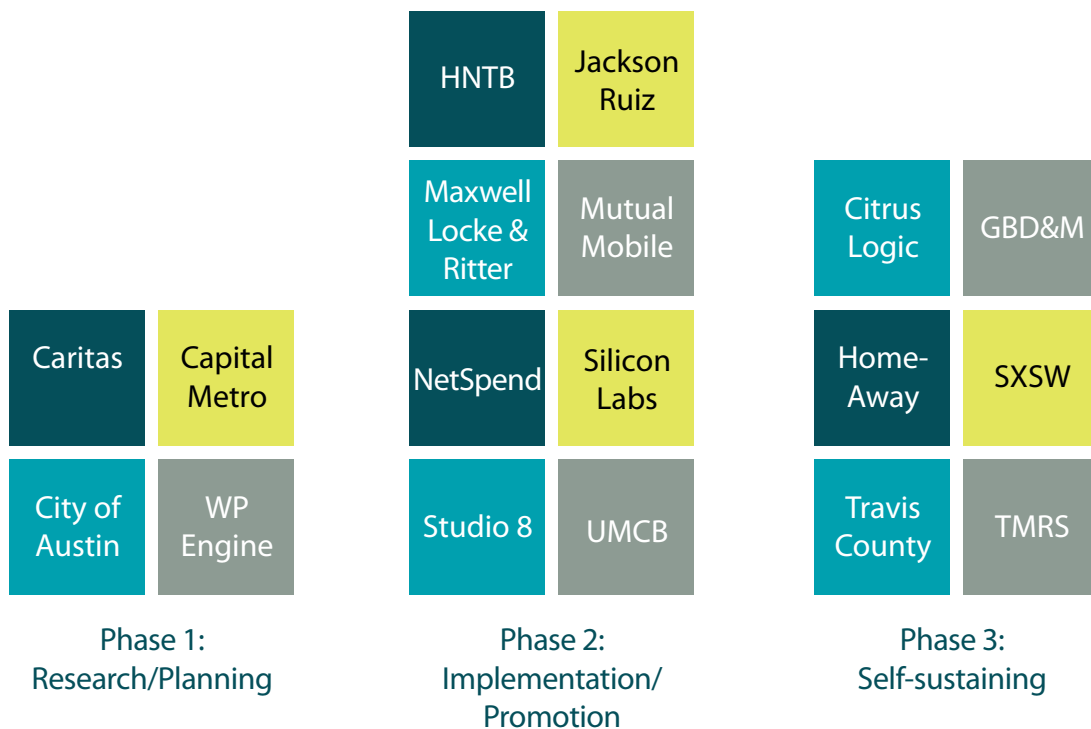
## Members

Movability provides employer consulting and employee concierge services to solve commuting challenges unique to downtown.

- 18 Downtown employers invest hundreds of thousands of dollars in transit passes, technology for telework, promotions for ridesharing, shuttle services, and much more.
- 11,900 employees have the opportunity to try the new mobility options their employers are providing when they decide the frustration or costs mean it's worth changing their commutes.

This year, we worked directly with 1,890 downtown commuters in person, and another 3,600 digitally to ensure they can find and use the mobility options available today.

Movability serves as a consultant helping companies research, develop, and implement mobility as a business strategy that also has public benefit.



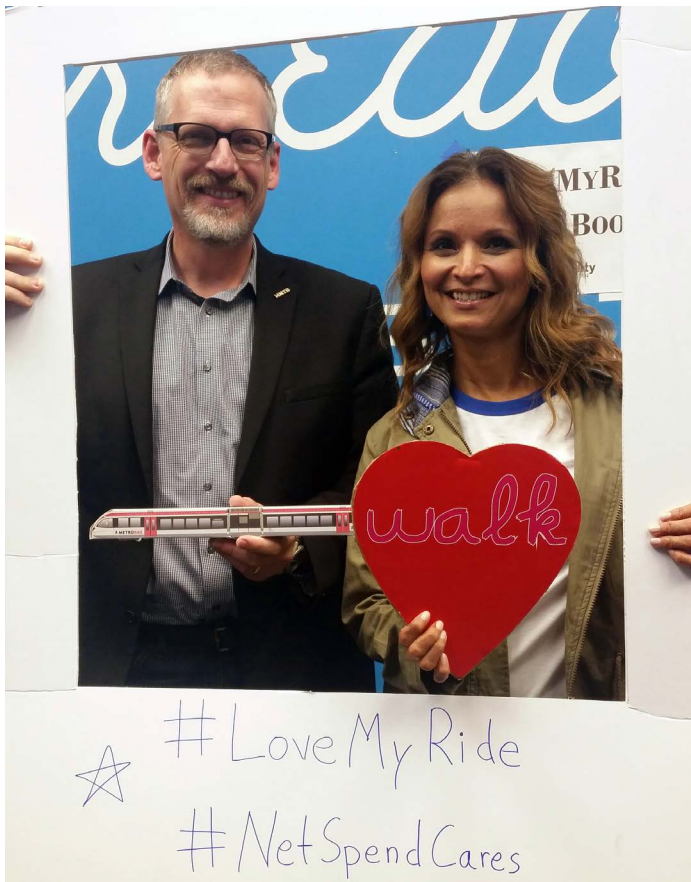
### EMPLOYER PROGRESSION TOWARDS MOBILITY SOLUTIONS

*"Mobility isn't our business, so when the City tasked all departments with having 20% of employees using commute options—we weren't exactly sure where to start. With Movability's help, we were able to integrate our "clean and green" departmental goals into a mobility plan. A majority of ARR employees come in before*

*traffic starts, so we were already well beyond the 20% goal but wanted to go even further to reduce our impact on Austin traffic. Now we are seeking to solve other challenges and make ARR a model for other City departments to emulate."*

—Austin Resource Recovery, City of Austin





### Mobility Challenge Participants

Mayor Adler is leading this “challenge” to employers in partnership with transportation agencies and local civic organizations. Employers meet this challenge by planning and implementing new commute benefits or policies that ensure at least 20% of their employees are using mobility options. [www.MobilitySolution.org](http://www.MobilitySolution.org)

Movability is a project manager for the Mobility Challenge, and will also begin a Certification in 2016 where every participating company provides information on what mobility programs or incentives they provide and how many employees are using mobility options.

## ORGANIZATIONS ACCEPTING MOBILITY CHALLENGE

### CLASS 2014-15

(Offering options to 27,983 employees)

300 West Sixth Bldg/Parkway Properties

AISD

Bazaarvoice

Capital Metro

City of Austin

NetSpend

NXP (formerly Freescale Semiconductor)

Texas Department of Transportation

University Federal Credit Union

### CLASS 2015-16

(Offering options to 46,455 employees)

AMD

Austin American Statesman

Austin Community College

Endeavor Real Estate

Graduating Class of Goodwill Industries

HNTB

HomeAway

Jackson Walker LLP

NFP Advisor Services

Oxford Commercial

Samsung Austin Semiconductor

Seton Healthcare Family

Silicon Labs

St. David's Healthcare Partnership

Texas Mutual Insurance

*“Teleworking was a good option because it saved me fuel costs, wear and tear on my vehicle as well as not having to get up as early to make the commute.” —Teleworker*

*“Taking the bus from my office to a meeting downtown was a great experience. I was able to take in the downtown Austin view and also get to my meeting on time.” —Bus commuter*



# ACTIONS AND ADVOCACY

## TRANSFORM YOUR TRIP

In 2015, Movability Austin worked with the City of Austin, Capital Metro, The Greater Austin Chamber of Commerce, and the Downtown Austin Alliance to conduct a pilot that tested how individualized marketing, highly successful around the U.S., could be deployed to change travel behaviors for downtown employees and encourage them to use more travel options. A core strategy of individualized marketing is to ask people to re-evaluate their travel, and give those who are interested or curious the ability and support to change their behavior.

Facing unique design challenges, Movability adapted the traditional Smart Trips model to use direct engagement strategies and motivational interviewing techniques. From February to August 2015, our travel advisors spoke with over 1,300 downtown employees, with 30% pledging to try a new commute option.

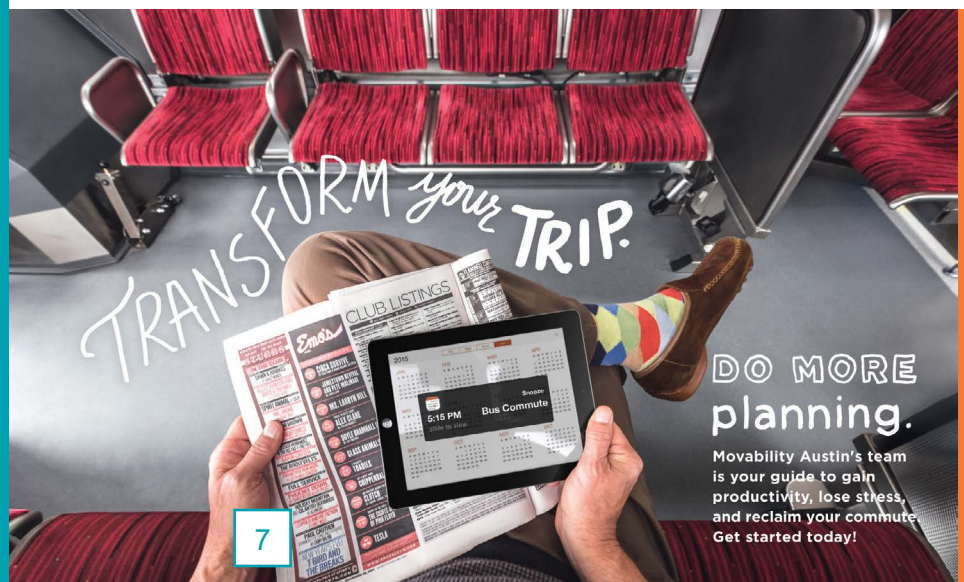
With this pilot, Movability was able to reach a wider audience of downtown commuters, beyond employees of our member companies. It also enabled us to experiment with new messaging and behavior change techniques that we have begun to weave into many aspects of Movability's work.

Read more about this project's design, outcomes, and lessons learned in our Do More: Transform your Trip report: <http://movabilityaustin.org/>

*"As a growing firm, we want our talented employees to be happy, healthy, and productive. Movability Austin helped us design and offer flexible scheduling that lets our team skip traffic and get more out of their days. Next year, we are looking forward to expanding this program and offering even more commute options to our employees."*

—Studio 8 Architects

*"B-Cycle has been fantastic. I have a membership now and enjoy riding the bike and not having to deal with locking it up afterwards. No challenges just pure joy."* —Biking



**DO MORE  
planning.**

Movability Austin's team is your guide to gain productivity, lose stress, and reclaim your commute. Get started today!

## TRANSPORTATION "ON DEMAND"

Movability Austin worked with the City of Austin and other partners to win a national search by the Rocky Mountain Institute (RMI) for the first ever pilot in how to develop "On-Demand" transportation. Now that Austin has been selected, Movability Austin is working with RMI to develop several employer-related pilots.

### GOALS

- Austin as lead implementation City
- Pilot programs to decrease congestion, increase mobility, and decrease costs
- Disseminate lessons nationally and internationally

### APPROACH

- Transit data sharing
- Commuting as a service
- Fleet electrification
- Self-driving vehicles
- Mobility centered development

### LOCAL PARTNERS

- Movability Austin
- City of Austin
- Capital Metro
- The Thrival Company
- Uber and Lyft
- Start up community

Movability will work with RMI and local employers to pilot incremental steps towards on demand services using emerging commuting solutions, then making sure they can be scaled up and grown to include more employees, and transferred to other employers and employment districts.

## Properties of Emerging Commuting Solutions

### 1. TECHNOLOGY ENABLED

- Commuters will receive live notifications and departure times via smartphones
- Riders will be able to request rides in real time
- End-to-end routing, booking, and payment will exist in single application

### 2. SHARED

- Employer aggregation enables critical mass of commuter solutions from high opportunity areas into downtown Austin
- Companies such as ZipCar and Car2Go will enable low-cost emergency ride home, errands, etc.

### 3. INEXPENSIVE

- Shared car usage and reduced parking costs will drive down the cost of commuting for both employers and employees

### 4. FASTER

- Mass transportation allows unlocked time during transit to be spent reading, working, or relaxing
- Use of Express and Transit Priority lanes give preference to mass transit users, reducing total travel time

*"Simply flexing my hours saved a lot of time and frustration related to my commute."* — Flex-time commuter

*"The commute was great! I loved riding my bike and felt refreshed before work and after work!"* — Bike commuter

*"My husband and I rode in together since we have now moved further from work. I loved it and will always do it, schedule permitting."* — Carpooler



*“HNTB works with the city of Austin, Tx-DOT, CTRMA, Capital Metro and other local partners to improve mobility for Central Texas. We work on some of the largest infrastructure projects in the region and recognize that travel demand management is just as important as building infrastructure for reducing congestion and improving mobility. We know that businesses such as HNTB must step up and encourage more of their employees to use travel options besides a single occupancy vehicle. Movability Austin has helped us take inventory of what our employees and company are doing for mobility now and evaluate how we can expand those offerings in the future. Throughout the planning process, Movability Austin stays focused on our company goals to ensure that our plan has buy-in and long-term viability.” —HNTB*

## SECOND ANNUAL MOBILITY WEEK

The Mobility Challenge team hosted the second annual Mobility Week in 2015. Employers participated by organizing events such as transit-to-lunch and carpool matching happy hours. Service providers also offered special discounts to encourage commuters to try out new options. The most popular option during Mobility Week was flex scheduling, with employees reporting that it helped them “save time and frustration” by missing traffic. More details are available in the Mobility Week 2015 report on [mobilitysolution.org](http://mobilitysolution.org)

## COORDINATING WITH MEMBERS AND ALLIES TO ACHIEVE MORE

Movability leverages its relationships with public and private partners knowing that, together, we can achieve more. This year we:

- Coordinated a “Beyond Traffic” round table discussion with US DOT Secretary Foxx;
- Helped Market District employers conduct an RFP for shared shuttle service
- Assisted Brazos Tech District with transit pass distribution
- Conducted a transportation focus group with the Austin Hotel and Lodging Association and connected hotels with potential park and ride locations
- Coordinated with Capital Metro, City of Austin, Austin Chamber and others on Mayor’s transportation agenda, including the State of the City speech.

## POP-UP COMMUTER BREAKFASTS

Movability hosted six pop-up commuter breakfasts with over 300 total attendees during 2015. These breakfasts were designed to reward and foster community among commuters using options, give other attendees a way to learn more about their options and hear about positive commute experiences firsthand, and provide sponsors (mostly transportation service providers) an opportunity to interact with commute audiences and promote new options.



## STAKEHOLDER ADVICE

Movability Austin represents our members by offering stakeholder advice in key transportation projects, providing a unique perspective focused on commuter needs. Movability staff started the year by educating new elected officials at the City Council Transportation Deep Dive. We participated in planning efforts for the Guadalupe Corridor, South Lamar Corridor, South MoPac Managed Lanes, Market District East/West Connections, Austin Climate Change Framework, and more. Movability actively encouraged our constituents to engage in Mobility ATX and the CAMPO 2040 planning process.

Movability advised Representative Celia Israel's office on drafting of HB 1839/SB 1032, state legislation allowing flex hours and telework for state workers. Staff also coordinated with Senator Kirk Watson's office and testified in support of this measure in the committee hearing. The bill was passed by both House and Senate but vetoed by the Governor.



*"Commuting outside of rush hour was great. I went to a movie downtown and waited out traffic." —Flex-time commuter*

*"Silicon Labs has called downtown Austin home for nearly a decade. When we moved to the north shore of Lady Bird Lake, we were excited about our vibrant, new location but realized that traffic and commute times were issues for many employees. We joined Movability Austin to be a part of the solution and also pledged our support for the city's 20/20 Mobility Challenge, empowering at least 20 percent of our Austin employees to use mobility options by 2020. In collaboration with Movability Austin, we have provided several affordable commuting options to employees including support for public transportation and bicycle commuting. We're proud to partner with Movability Austin to make it easier for our employees to commute to work and have a more enjoyable downtown experience."*  
—Silicon Labs



# COMMUNICATIONS AND EARNED MEDIA

Movability seeks to help the public envision new transportation solutions through various communications channels, including social media (Facebook and Twitter), earned media, the MovabilityAustin.org web site, and the Let's Go News twice-monthly newsletter.

## Earned Media Stories

10 earned media stories in 2015 included

- **Movability Austin's role in bringing U.S. Transportation Secretary Anthony Foxx to Austin**
- **How Movability Austin provides concierge services with Commute Chats**
- **The rising role of flex time in commute solutions**

## Total Audience Through Movability Austin Channels

**FACEBOOK** 943 followers, 20% growth in 2015. Movability's average total reach for Facebook posts in 2015 was 15.7%

**TWITTER** 1,568 followers, a 23% growth in followers in 2015. Movability's average engagement rate on Twitter was 1.4% over the year, with an average of 36 retweets per month. That's well above the average monthly Twitter retweet rate of 14 retweets per month for the education and nonprofit sector, according to a recent **Social Engagement Benchmark Report for Twitter**.

**LET'S GO NEWS** 1,222 recipients, a 15% growth in 2015. According to **Social Media Benchmark's 2015 study**, the average email list size grew by 11% for nonprofits in the past year, putting Movability's email reach well above the curve.

*"It was wonderful to have to be done with work in order to catch the last train! Good excuse to be efficient and leave!"*  
—Train commuter

KEYE story: Movability Austin  
Cutting Congestion with  
Commute Chats





# 2015 BOARD OF DIRECTORS

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## MOVABILITY AUSTIN AT A GLANCE

Movability Austin is an Austin-based nonprofit association of organizations with a common interest—to increase mobility for everyone coming to downtown Austin.

### PARTNERS



### MEMBERS



### AFFILIATE MEMBERS



## 2015-16 Budget

### 2015 BUDGET PRIORITIES

- Movability has grown contract for services revenues significantly and doubled the number of employers with whom we work
- We are on track to have a three month reserve in the 1st Quarter of 2016

### 2016 BUDGET PRIORITIES

- Increase capacity to provide high quality services to the growing number of interested employers
- Facilitate a seamless transition as Movability has key staffing changes
- Support the innovative "on demand" work between Austin and Rocky Mountain Institute and Austin's efforts to win the Smart Cities Challenge

## MISSION

To support economic vitality and sustainability of downtown Austin employers by promoting transportation programs and services designed to enhance access, parking and mobility, as well as improve the quality of life for employees, residents and visitors.

### 2015/2016 BUDGET

Revenues	2015	2016
MEMBERSHIP	\$133,963	\$187,700
CONTRACTS FOR SERVICE	\$144,230	\$310,000
GRANTS	\$2,780	\$-
EVENTS	\$6,215	\$10,000
<b>TOTAL REVENUES</b>	<b>\$287,188</b>	<b>\$507,700</b>
Expenses	2015	2016
Admin/Overhead		
PAYROLL	\$127,936	\$210,518
PROFESSIONAL SERVICES	\$2,040	\$35,396
OVERHEAD	\$12,708	\$14,615
DEPOSIT TO RESERVE	\$15,000	\$30,000
Program		
CONTRACT SERVICES	\$58,739	\$206,099
EVENTS/MEETINGS	\$2,032	\$6,200
SUPPLIES	\$863	\$600
OTHER COSTS	\$1,990	\$4,272
<b>TOTAL EXPENSES</b>	<b>\$221,308</b>	<b>\$507,700</b>