Ride-Hailing and Transit Integration

Individual Choices, Patterns and Nudging Takeways

Ana Guerrini
99 Director of Public Policy
SNAPSHOTS OF 99-IPSOS SURVEY

UNDERSTAND MOBILITY HABITS AND BEHAVIOURS OF THE BRAZILIAN POPULATION

1,500 INTERVIEWS

APR/MAY 2019
REGIONAL REPRESENTATION

- Metropolitan region and capitals: 26%
- 100K or more: 8%
- 50K to 100K: 8%
- Up to 50K: 9%
- 33 municipalities
- 13 municipalities
- 4 municipalities
- 20 municipalities

86% urban areas
14% rural areas
DECLARED AVERAGE MONTHLY COST WITH TRANSPORTATION IS 21% OF THE MINIMUM WAGE

27% OF BRAZILIANS BELIEVE THEY SPEND UP TO 5% OF THEIR INCOME IN TRANSPORTATION

<table>
<thead>
<tr>
<th>Cost Range</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>R$ 446</td>
<td>27%</td>
</tr>
<tr>
<td>R$ 302</td>
<td>24%</td>
</tr>
<tr>
<td>R$ 181</td>
<td>16%</td>
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<tr>
<td>R$ 158</td>
<td>21%</td>
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<tr>
<td>No costs/do not know</td>
<td>13%</td>
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</tbody>
</table>
76% of Brazilians do not plan their monthly spending in transportation.

BRAZILIANS (ECONOMIC CLASS C) SPEND 4X MORE WITH THEIR CAR THAN WHAT THEY PERCEIVE

Average Cost Declared
R$ 357/month

Detailed Average Cost Declared
R$ 1,436.33/month
(IPVA, licensing, insurance, parking, gas, cleaning, fines, etc.)
DIFFERENT MODES DURING THE WEEK

On average, Brazilians use 3 different modes of transportation during the week.
21% WOULD CONSIDER REDUCING THE USE OF OWN CARS TO USE ANOTHER MODE

<table>
<thead>
<tr>
<th>Transportation Mode</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>MUNICIPAL BUS</td>
<td>24%</td>
</tr>
<tr>
<td>OWN BYCICLE</td>
<td>22%</td>
</tr>
<tr>
<td>INTERMUNICIPAL BUS</td>
<td>18%</td>
</tr>
<tr>
<td>MOTORCYCLE</td>
<td>16%</td>
</tr>
<tr>
<td>RIDE-HAILING</td>
<td>10%</td>
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WOULD YOU GIVE UP USING YOUR CAR IN FAVOUR OF ANOTHER MODE?

- 70% NO
- 30% YES
USES RIDE-HAILING + OTHER MODE

Thinking about last week, with which frequency did you use:

- Walk – over 500m: 74%
- Bus (municipal/inter-municipal/microbus/van/charted): 62%
- Car (passenger or driver): 55%
- Motorcycle: 17%
- Bicycle / Scooter: 21%
- Subway/Train/BRT/VLT: 14%
- Taxi: 18%
COMBINATIONS WITH RIDE-HAILING

- RIDE-HAILING + WALKING: 13.9%
- RIDE-HAILING + MUNICIPAL BUS: 10.2%
- RIDE-HAILING + CAR (AS PASSENGER): 9%
- RIDE-HAILING + MUNICIPAL BUS + WALKING: 8%
We’ve been studying integration phenomenon for a while, as we know that nearly **10%** of 99 rides in São Paulo Metropolitan Region are made with transit integration.
NEW STATIONS IN SÃO PAULO: INCREASED TRANSIT CAPILLARITY

Line 4 – Subway Yellow Line’s last stop was Butantã, but in September 2018, São Paulo – Morumbi station opened.
SHIFT IN INTEGRATION PATTERN: USERS CHANGE BEHAVIOUR

99 was used from Butantã Station to access a number of neighbourhoods on west and southwest districts of the city.

Comparing to May 2018 rides (red), May 2019 rides (blue) to southwest zones are not so present anymore.
This is explained with the new pattern of rides to São Paulo - Morumbi Station, that exactly matches with the gap between blue and red lines to Butantã Station.
NEW BEHAVIOUR, LOWER COSTS TO USERS

As the Metro system is closer to users’ destinations, we can already see that rides that integrate with the Yellow Line had their distances decreased by 12%.

This means: smaller distances, fewer costs to users and fewer car miles traveled.
More information about transportation modes, trajectories and costs;

There is willingness to abandon the use of own cars and try new modes, such as public transportation and ride-hailing;

Ride-hailing is an alternative to own private cars and has an important role in integrating with public transportation;

Public policies should nudge changes in perception and behaviour for better integrated mobility: more information, physical integration, payments integration;

Cities are made by people and they should be included in the mobility debate.
Thank you!

Ana Guerrini
ana.guerrini@99app.com
https://medium.com/para-onde-vamos