



Executive Summary

California's recently approved 2018 State Rail Plan highlights the need to deliver seamless travel across multiple modes – interconnecting rail, metro, bus and private mobility providers – on a single ticket, with the aim of making public transportation easier, quicker, and more attractive to use than ever before. In the context of recent challenges to growth in public transit ridership and in light of the many changes in the way people are using new mobility choices to handle their transportation needs, the need for integration among operators and across modes is even more apparent.

Multimodal journey planning and ticketing is important to facilitate sustainable mobility and travel for citizens and visitors, promote a shift towards the use of public transport, and foster improved integration of the available modes.

The California State Transportation Agency (CalSTA), in conjunction with Caltrans, the Capitol Corridor Joint Powers Authority (CCJPA), and local, regional and state partners, has begun an integrated travel project (Cal-ITP) to research, plan and establish a statewide framework for multimodal transport interoperability. A major activity of this effort is the launch of a multi-year trial of a travel planning and payment pilot including small, medium and large agencies, and private providers. The project will link California's intercity passenger rail corridors with megaregional, urban and rural operators, delivering new connectivity options to encourage use while ensuring best value for travelers. Other integration efforts related to development of better scheduled connections and development of new services that fill public transportation network gaps are also underway, primarily through a large number of network integration efforts connected to grants from the Transit and Intercity Rail Capital Program (TIRCP).

Although until recently uncommon in the United States, the concept of integrated travel is not new; there have been successful implementations of multimodal trip planning and payments around the world including Hong Kong, Taiwan, Japan, Korea, Scandinavia, the Netherlands, Switzerland and the United Kingdom. In 2017, early work conducted for Cal-ITP (referred to as *Phase 1*) examined many of these implementations to understand their key drivers; policies and processes for political and technical execution, and to identify a set of recommended best practices for California. Key themes that emerged from the Cal-ITP Phase 1 research included the criticality of policy, governance, inter-agency agreements, harmonized standards, and open data. In more recent years, consumer adoption of smartphones has driven a move to mobile-based trip planning and payments for many users, while mobility-as-a-service (MaaS) providers have introduced travel alternatives that in many cases complement public transit for provision of first and last mile services. In almost all cases, successful integrated travel initiatives have been coordinated and driven by the State or regional federation, with varying levels of voluntary and mandatory participation by regional and local public transportation operators depending on the country.

With the completion of the initial phase and recommendations for next steps, CalSTA authorized a second Cal-ITP phase that established a formal Steering Committee and Advisory Board of industry experts to guide the Cal-ITP effort, with a focus on obtaining



feedback from a wide range of California transit stakeholders so that efforts to pilot elements of integrated travel could reflect California-specific needs and requirements. A conference was planned for May 2018 that would bring together key stakeholders from state agencies, regional and local transport operators, shared mode providers, and the academic and business communities. The event offered participants an opportunity to learn more about integrated travel concepts, ask questions of leading European and North American agencies who have deployed multimodal travel planning and payment platforms, and provide opinion and help shape progress on a statewide solution for California. With more than 200 attendees and speakers participating over a two-day agenda comprising ten hours of keynotes, session and panels, the conference received a 92% approval rating. It provided an opportunity for CalSTA and its partners to frame the discussion of an innovative opportunity to improve the travel experience throughout California, while offering a chance for input from a wide audience within the state's transportation community.

When polled, 78% of conference attendees who responded were 'very sure' that California transportation agencies should work collaboratively on a framework for statewide integrated trip planning and fare payment.

The second phase of Cal-ITP is now concluded, and a third phase is planned to commence in late 2018 utilizing TIRCP funding that will allow a multi-agency pilot of integrated travel planning and fare payment.

This report draws from the feedback received to date and provides the following key recommendations for possible next steps to be addressed during the development of the pilot:

- Define the Role of the Cal-ITP Steering Committee
- Establish an Interim Managing Entity
- Create a Program Management Office
- Develop a Business Case and Business Plan for Integrated Travel
- Develop an Approach for California Mobility Data and Related Policies
- Plan an Integrated Travel Pilot

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