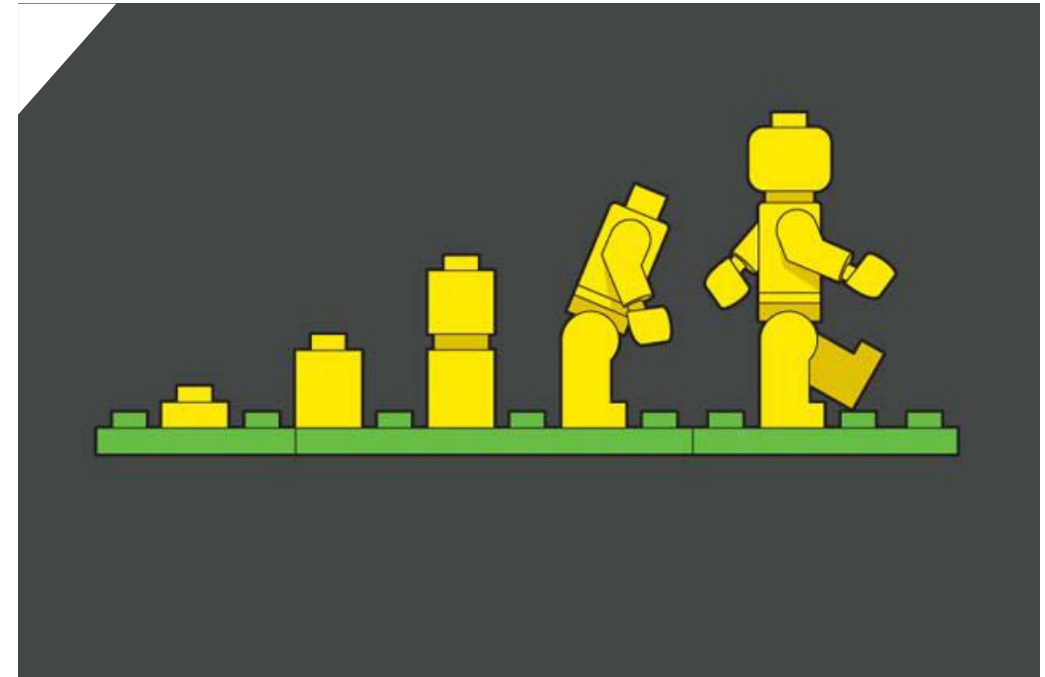


A wide-angle photograph of the San Francisco International Airport terminal at dusk. The terminal's iconic white, rib-like roof structure is illuminated from within, creating a warm glow against the darkening sky. The glass facade reflects the ambient light. The words "SAN FRANCISCO INTERNATIONAL" are visible on the glass. In the foreground, a blue-tinted overlay shows a blurred view of the airport's roadways and traffic. The overall mood is modern and dynamic.

TNC Growth & Impact at SFO

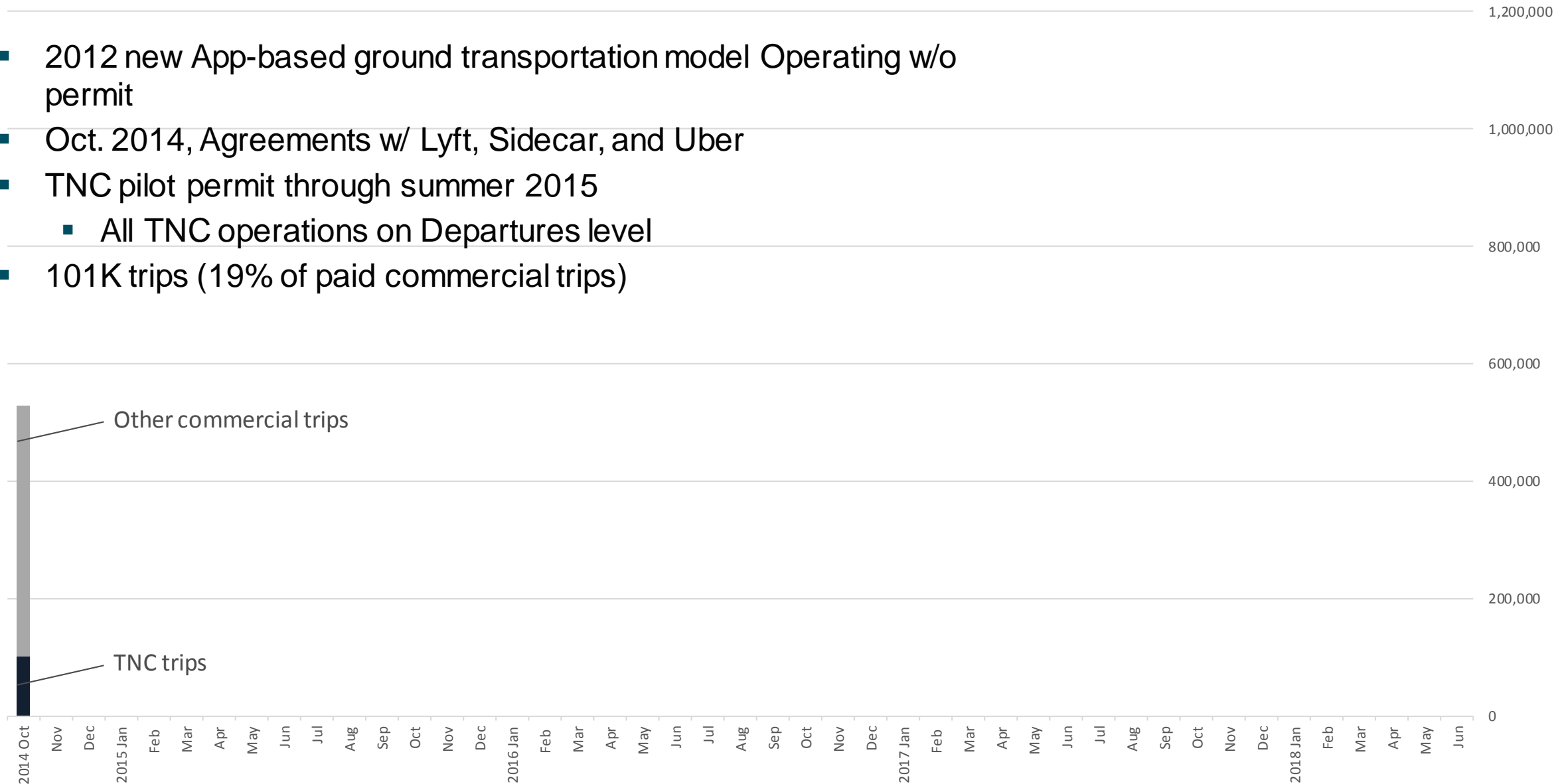
Agenda

- Inception and evolution of TNCs at SFO
- Impact of TNCs on existing ground transportation models
- Impact of TNCs on Airport operations and revenue
- Mitigation and Solutions



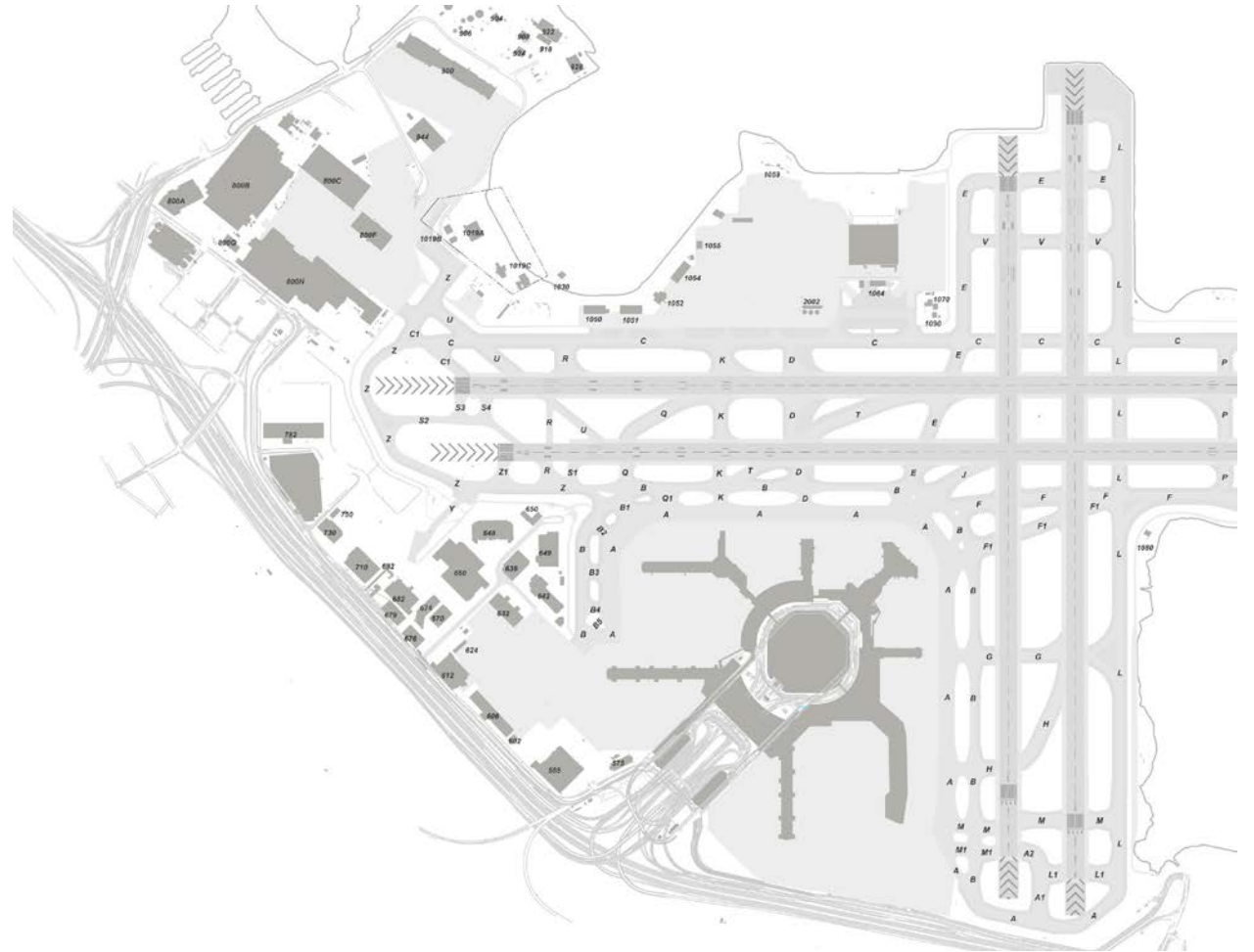
TNC Trips: October 2014

- 2012 new App-based ground transportation model Operating w/o permit
- Oct. 2014, Agreements w/ Lyft, Sidecar, and Uber
- TNC pilot permit through summer 2015
 - All TNC operations on Departures level
- 101K trips (19% of paid commercial trips)



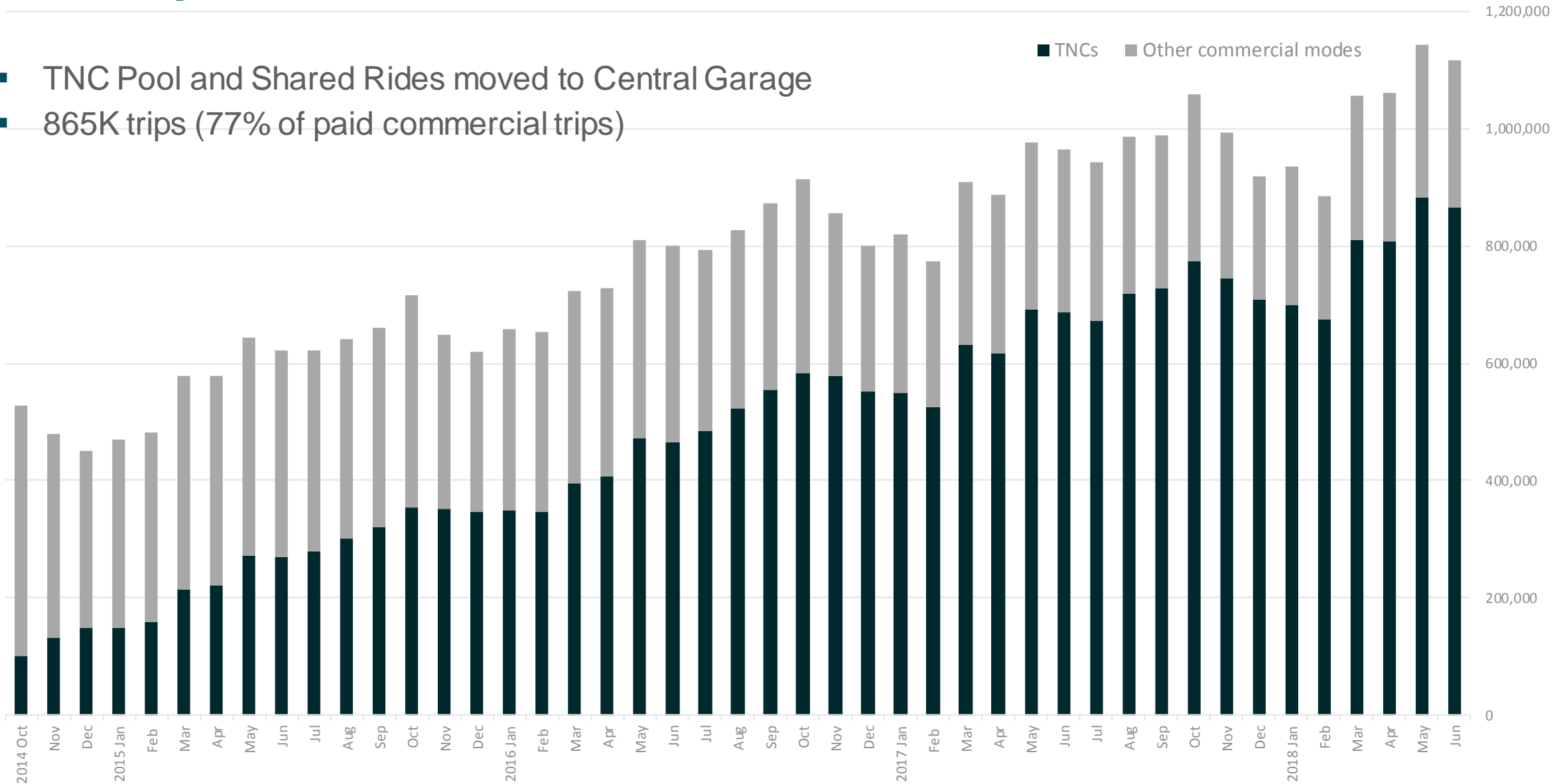
Geo Fence

- SFO Developed a TNC tracking system
- Real-time Transaction Reporting
 - Entry/Exit
 - Pick-up/ Drop-off
 - Accept transaction data
- Helps with enforcement
- Data Elements
 - Transaction type
 - Timestamp
 - Transaction Location
 - Vehicle License Plate
 - Driver/ Trip ID
 - Ride Status



TNC Trips: June 2018

- TNC Pool and Shared Rides moved to Central Garage
- 865K trips (77% of paid commercial trips)



Domestic Terminals Garage Operation

- 30% reduction in TNC trips needed to maintain acceptable congestion levels
- Pilot Program: Jun–Sep 2018
 - Relocate shared services to garage
 - Two-tier trip fee: \$5.00 and \$3.60



Notice to TNC Drivers:

New pick-up area for some trips.

Check app to confirm rider's location.



A new TNC rider pick-up area is now open on the roof of the Domestic Garage. This pick-up area is for the following domestic terminal passengers:

- Uber Pool, Uber Express Pool
- Certain Lyft riders, especially 10am–1pm and 6pm–11pm

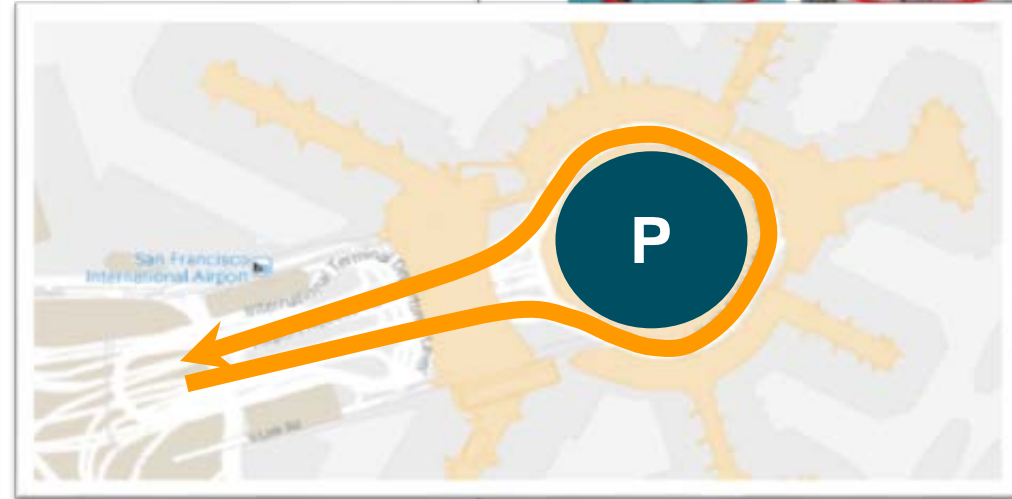
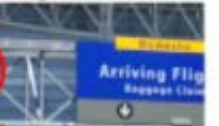
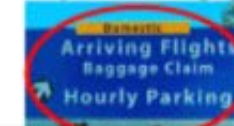
Other riders should be picked up at the terminals, as usual. Before leaving the lot, check your driver app to confirm your rider's pick-up location.

Directions to the Garage pick-up area from the TNC lot:

1. When approaching the Airport, keep left for "Domestic Terminals 1/2/3"

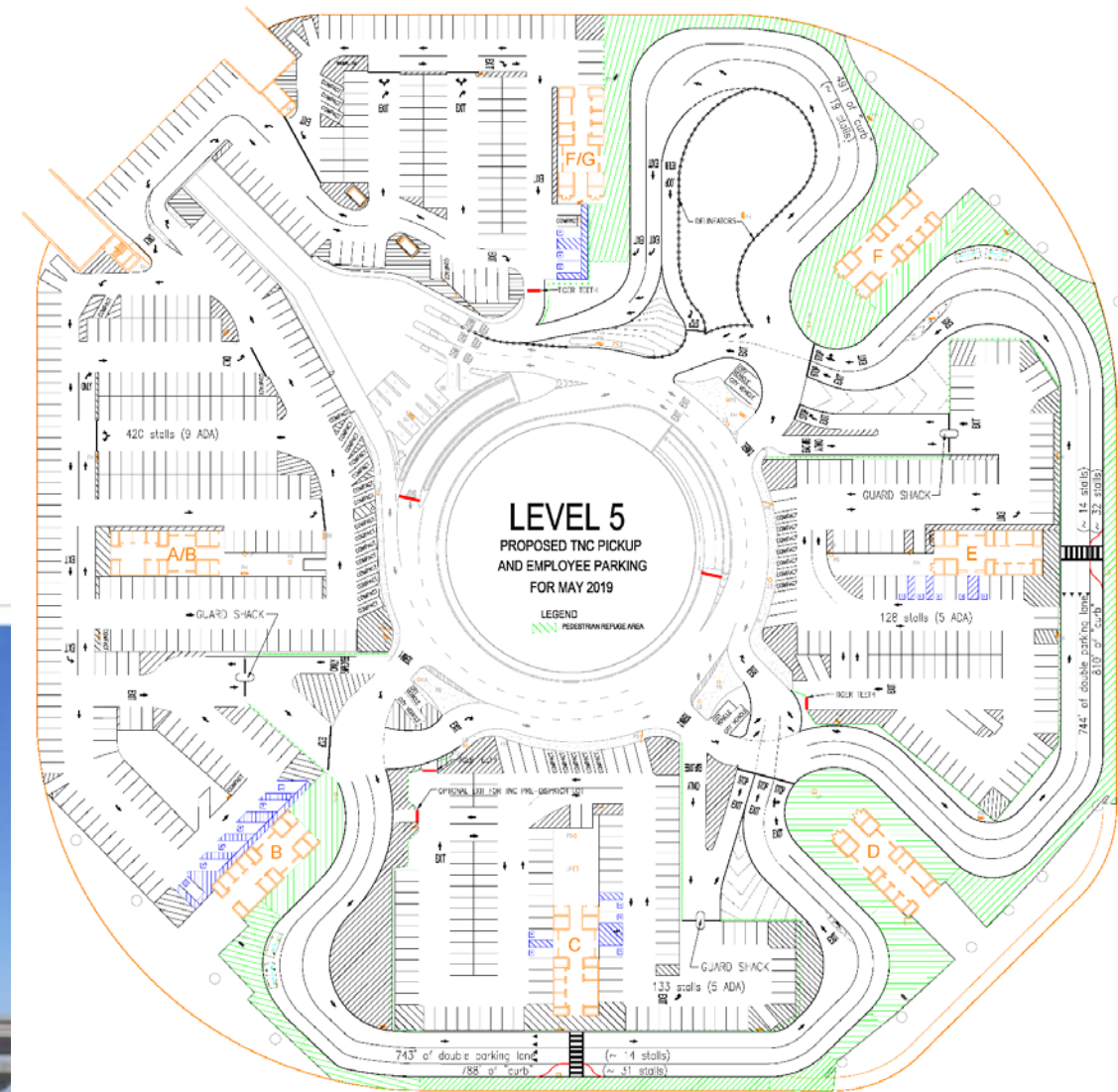


2. Keep left, following signs for "Domestic Hourly Parking"



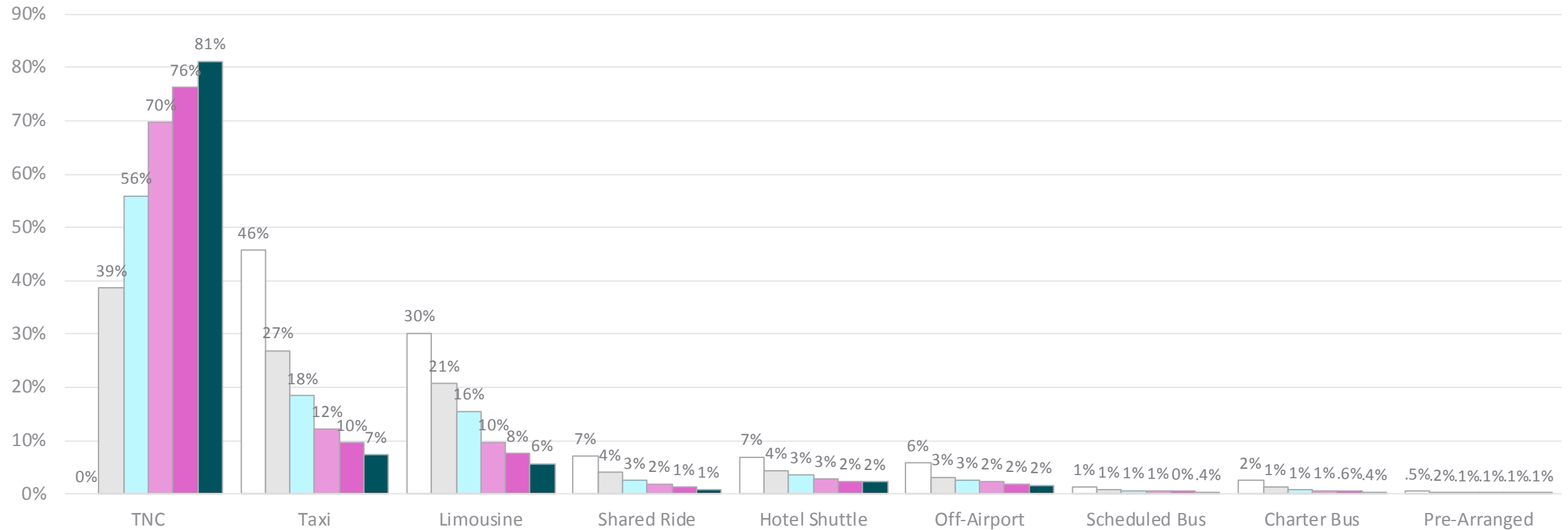
Pilot Program Outcome

- Actual diversion not adequate
 - Target: 30% of vehicles, or 45% of transactions
 - Up to 24% of transactions, but only 17% vehicles
 - Maintain 15 miles per hour
- Wayfinding challenges for drivers and passengers
- Inadequate facilities in garage

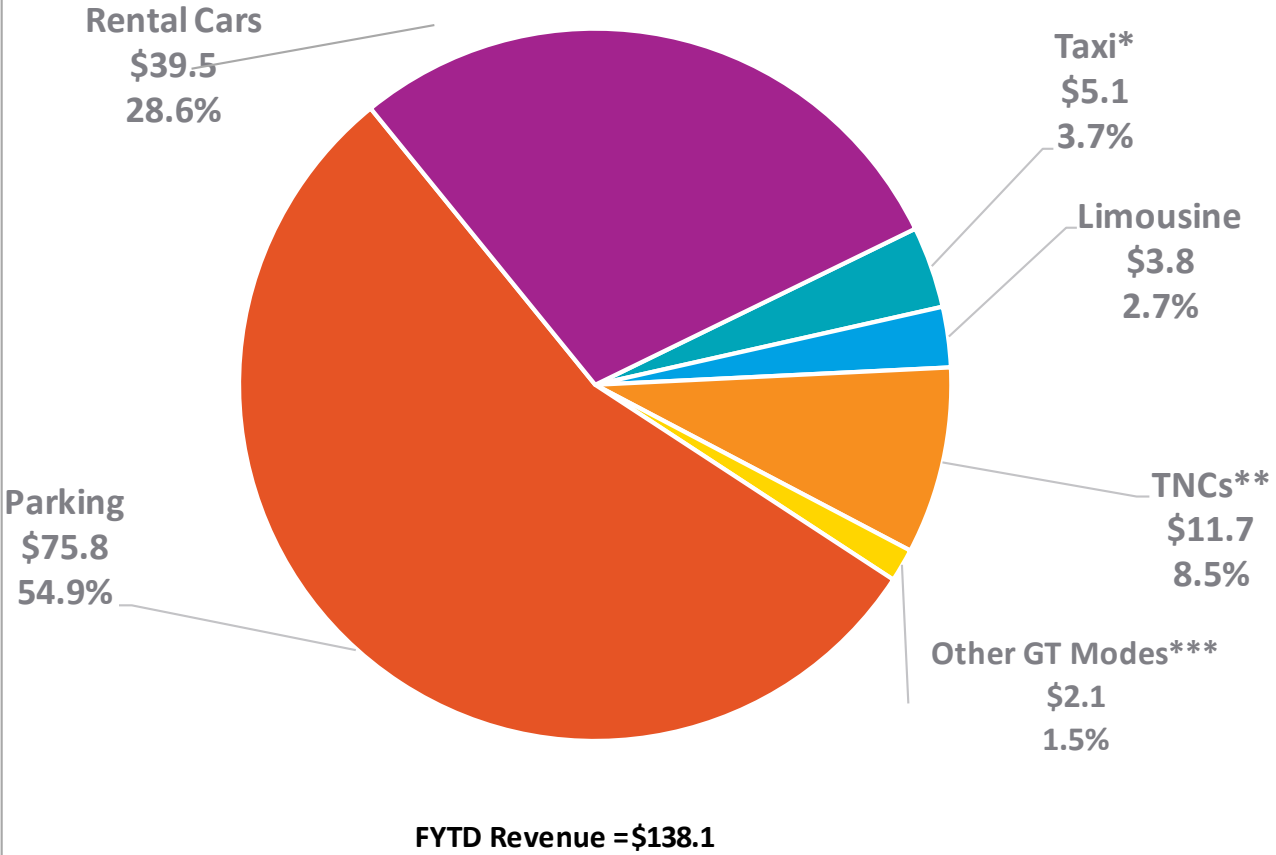


Year Over Year Comparison: April

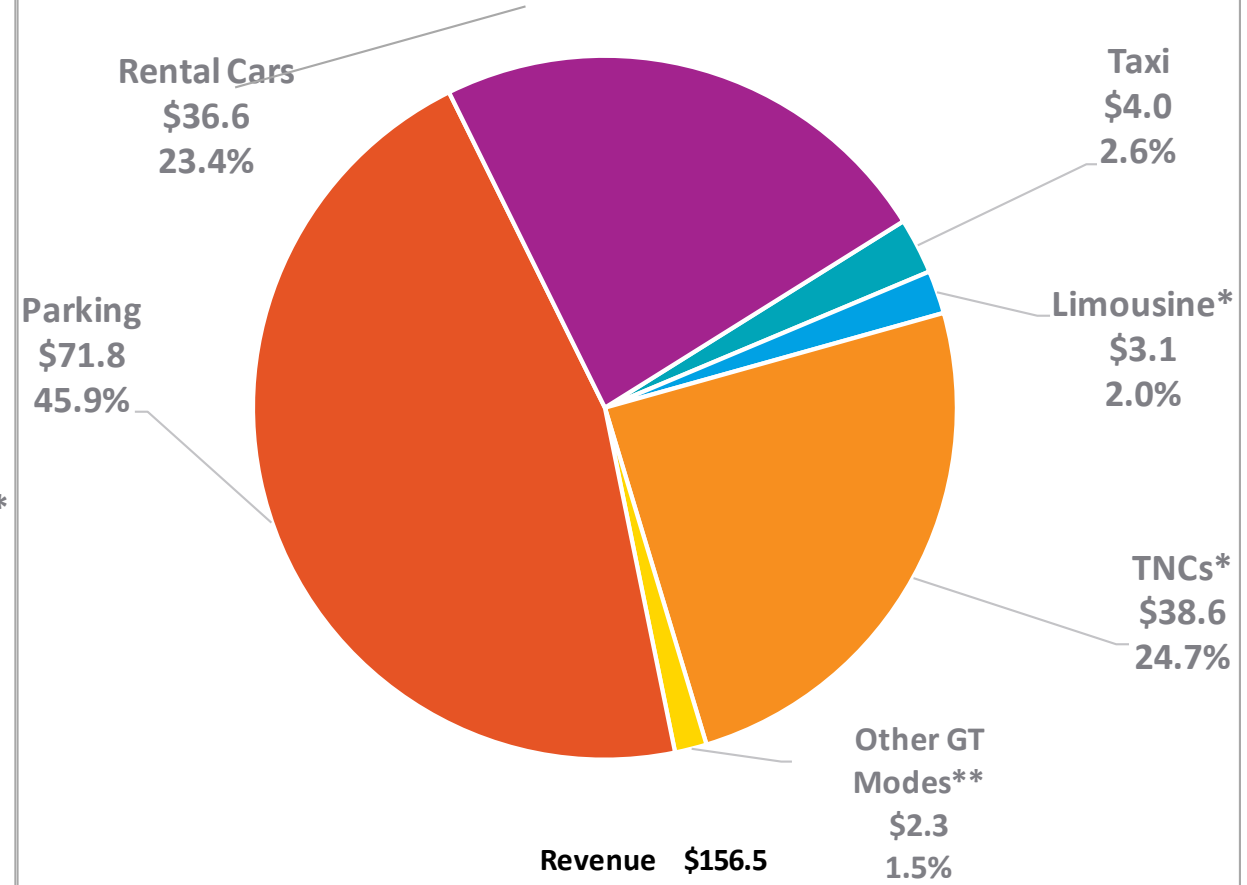
□ 2014
 □ 2015
 □ 2016
 □ 2017
 □ 2018
 □ 2019



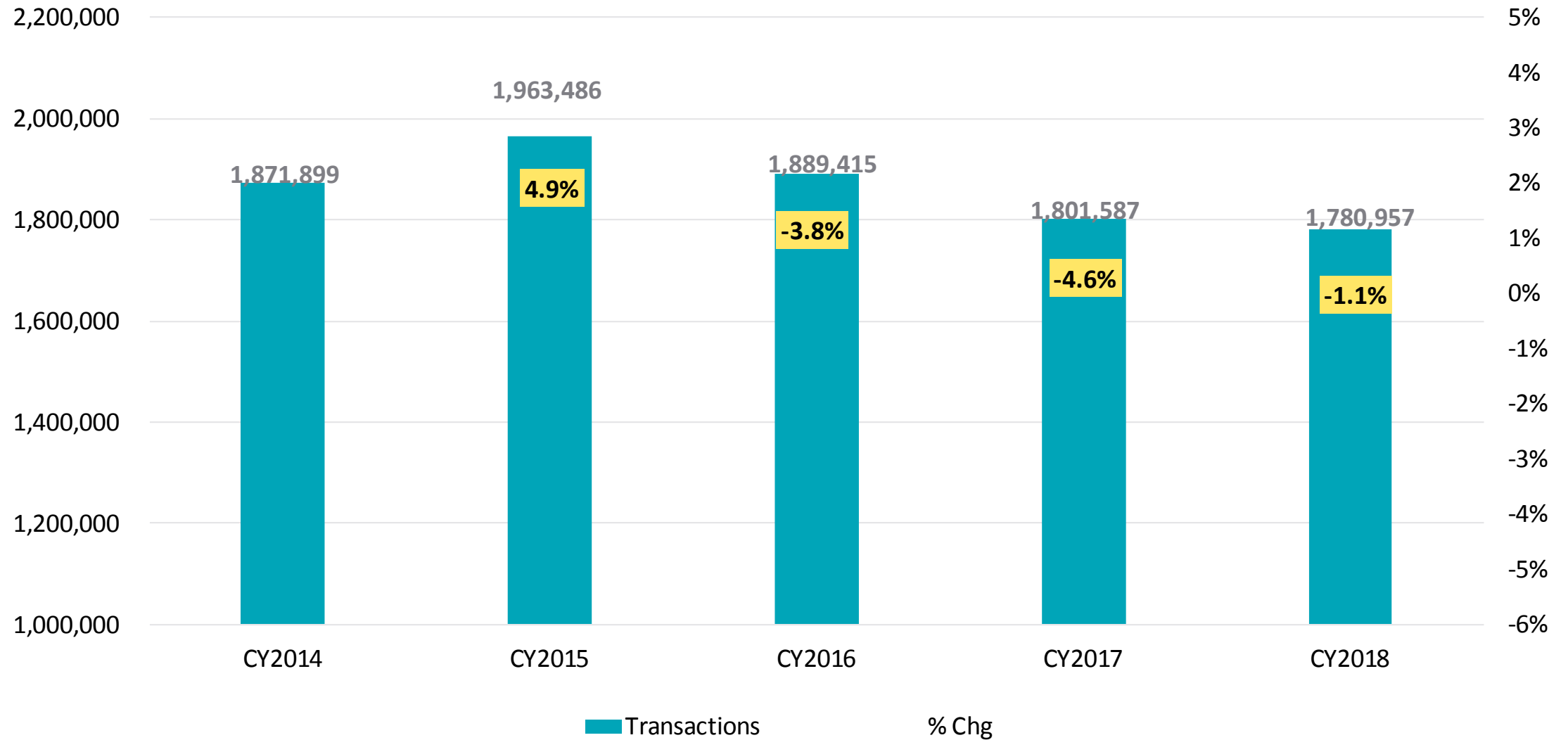
FYTD 2016 Groundside Revenue



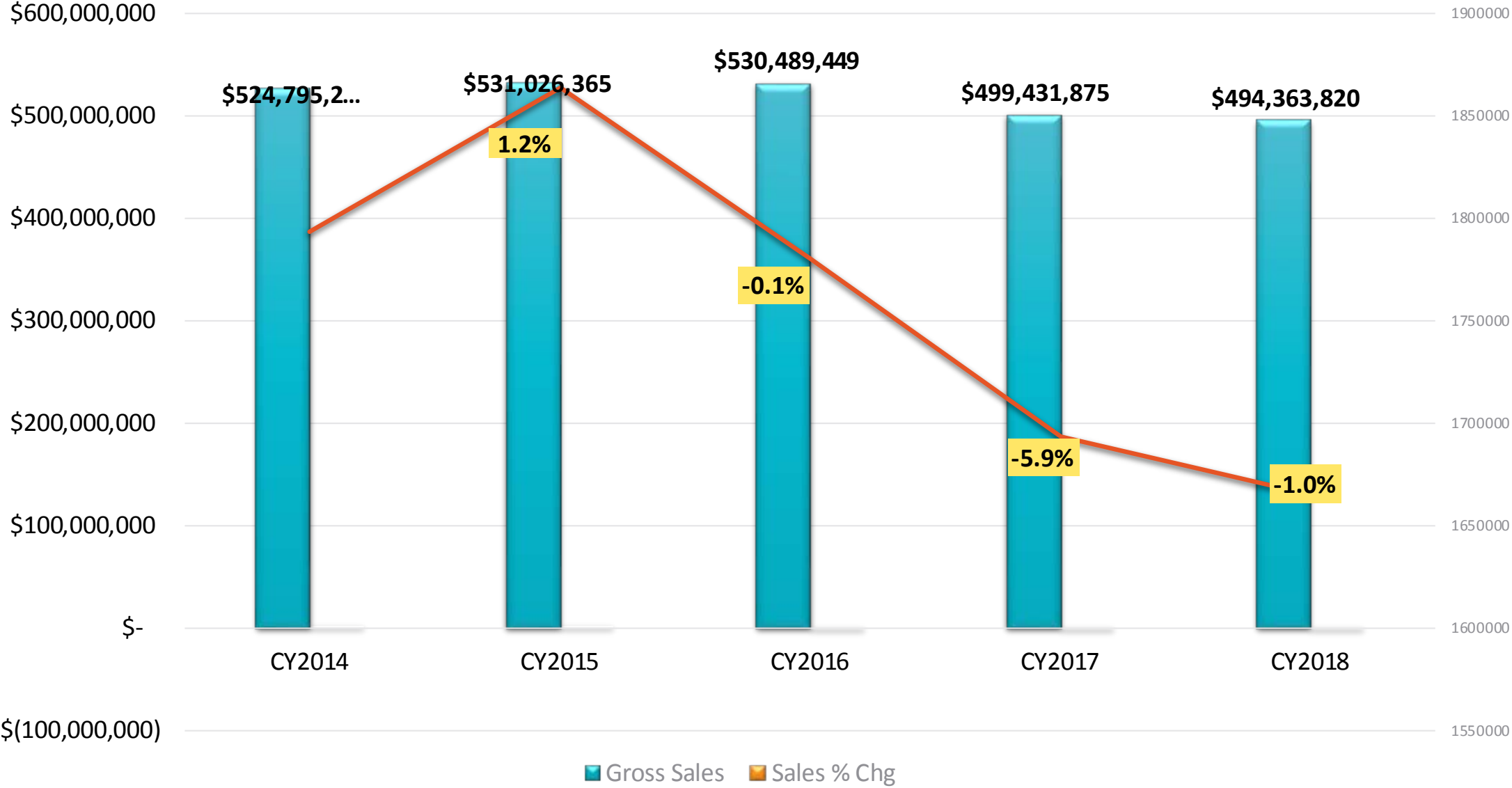
FYTD 2019 Groundside Revenue



SFO Rental Car Transactions

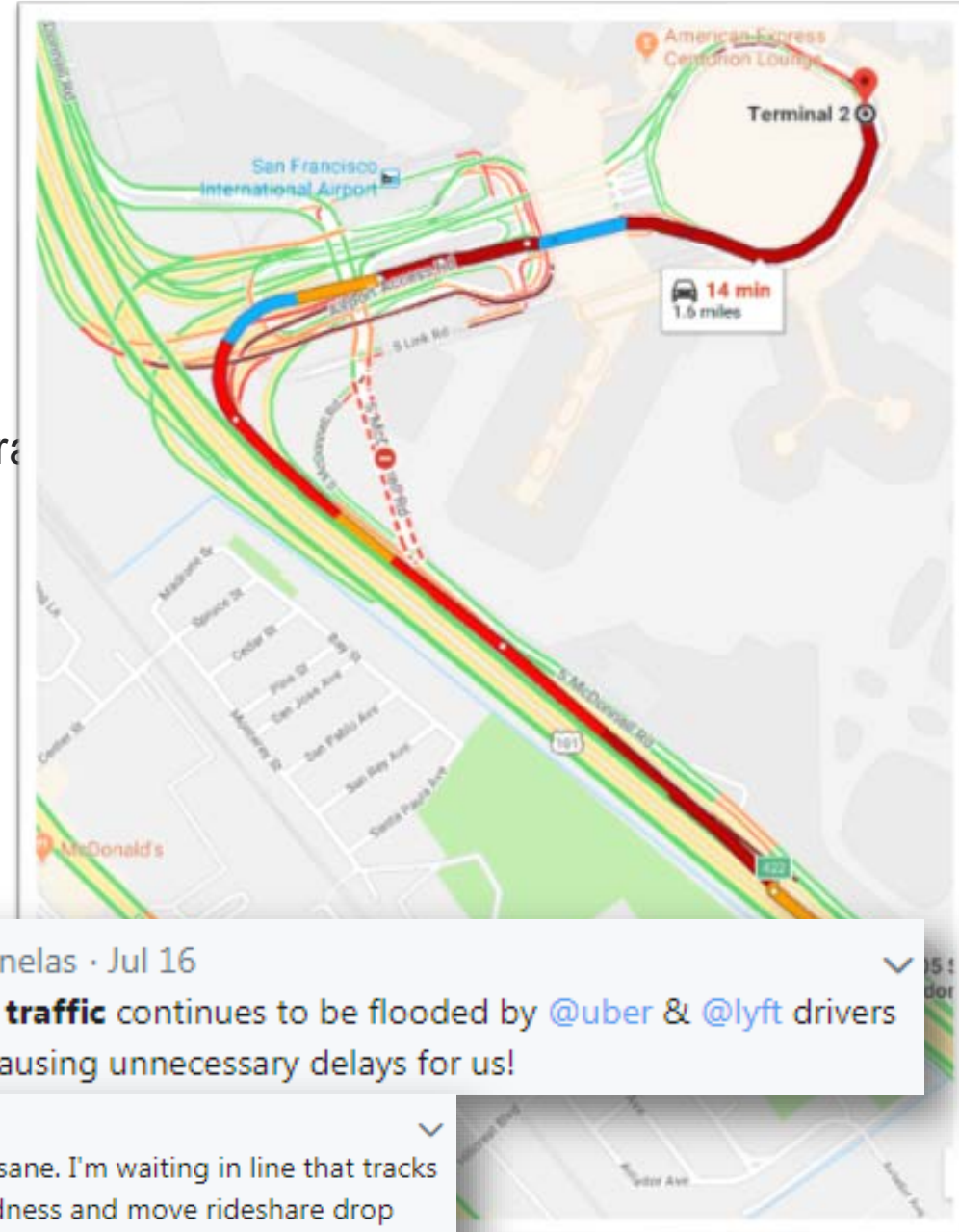


SFO Rental Car Sales



Challenges

- Incorporate new business model and new permit development
- Meet new and shifting customer expectations
- Limited space at the Airport
- Identify staging lots
- Maintain a fair and competitive system, Equity w/ other GT operators
- Wayfinding
- Manage curbside and roadway congestion
- Enforcement and appeals
- Drivers' behavior
- Maintain safety and security
- Roadway reconfiguration
- Construction and capital projects
- Loss of revenue
- Media campaigns



Ornelas 🍷 🍇 🧑‍🚒 @ornelas · Jul 16

@flySFO the departure **traffic** continues to be flooded by @uber & @lyft drivers waiting in the arrivals causing unnecessary delays for us!

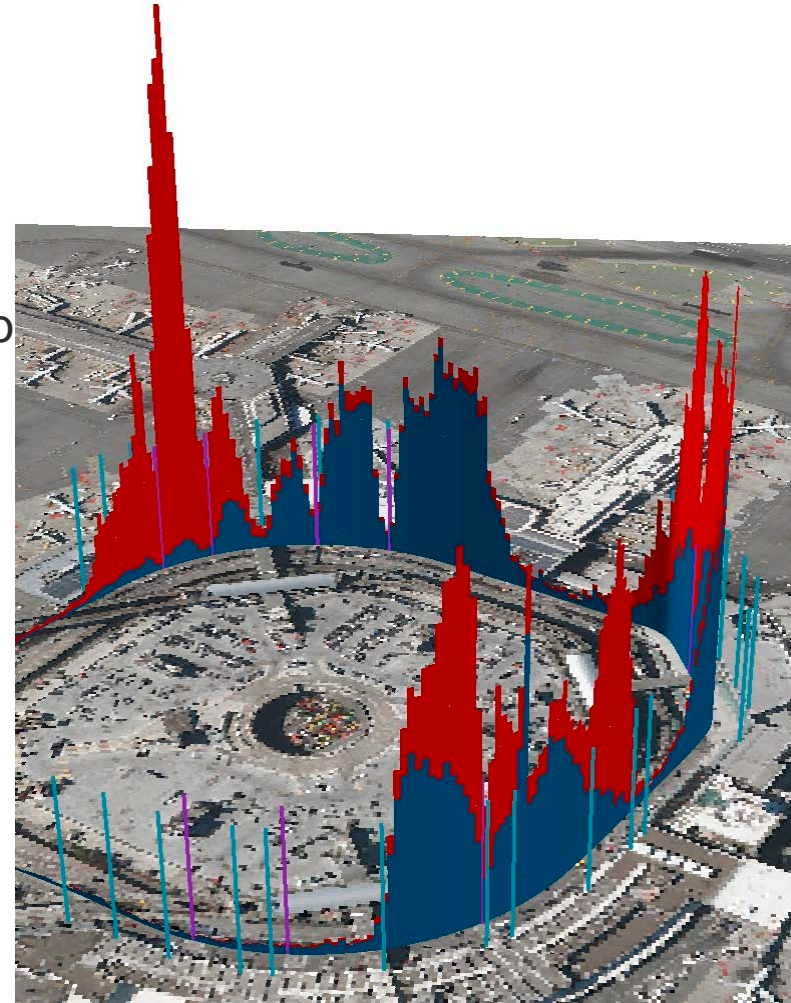
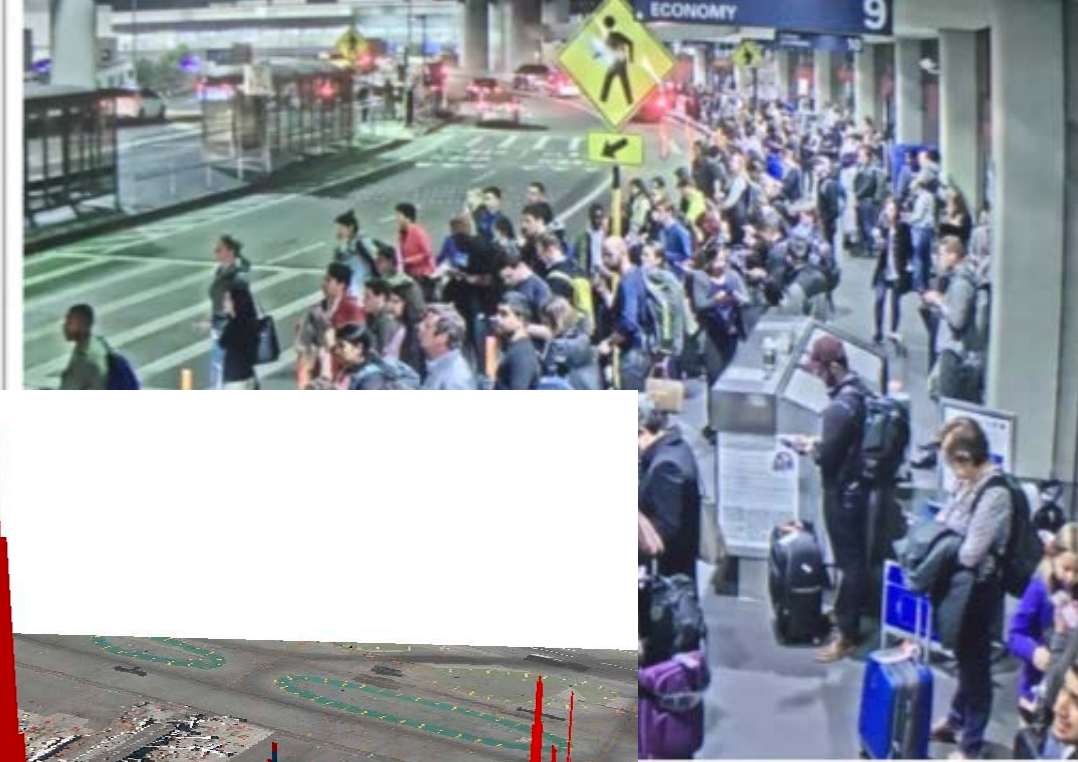


Gabriel Lazarin @lazgabe · Sep 24

@flySFO the **traffic** management is officially insane. I'm waiting in line that tracks all the way back to 101 exit ramp. Stop the madness and move rideshare drop offs to lower level.

Congestion Mitigation Strategies

- Increase terminal curbside efficiency
- Incentive for garage P/U
- Add traffic control and enforcement officers
- Move large vehicle drop-off to terminal islands
- 30-minute grace period in garages
- Drop-off on Arrivals level
- Public transit and other high-occupancy modes
- Re-match to reduce vehicle counts
- Redistribute TNC passenger demand along curb
- Restricted certain Taxi P/U
- Enforcement



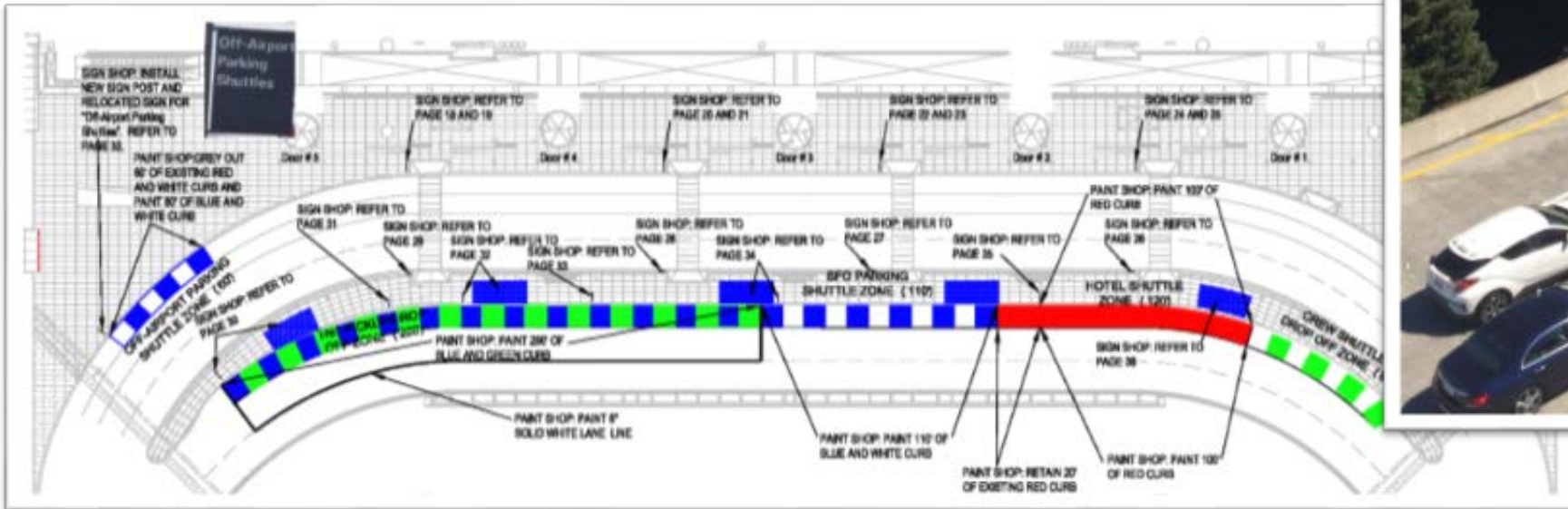
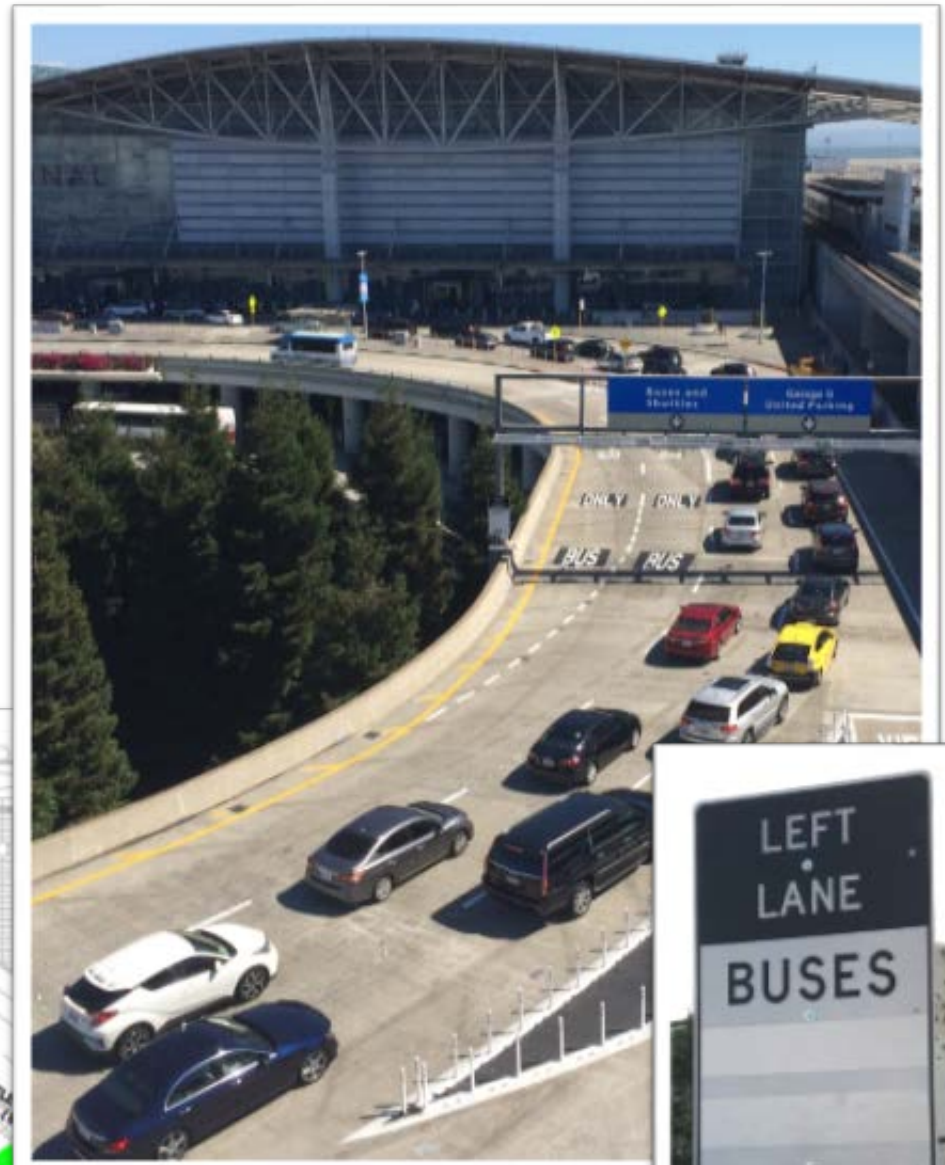
Planned Approach

- Effective June 5th, all pick-ups moved the Central garage
- Garage improvements
 - Major reconfiguration
 - Waiting area amenities
 - Media Alerts/outreach
- Wayfinding improvements
- Interim measures:
 - Disable Re-match
 - TNC and Airport Ambassadors
 - Others



International Terminal

- Garages far from terminals
- Island lanes underutilized
- Plan:
 - Bypass lane for commercial vehicles
 - Relocate all TNC activity to island



Looking Ahead

- Continued growth
 - Enplanements
 - Construction
 - TNC trips
 - Newer concepts
- Managing private vehicles
 - Curbside access fees?
- Ground Transportation “Central Hub”
- LTPG 3
- New RCC



Thank you!

