Ventra Overview

T3 Webinar: Strategies for Implementing Open and Mobile Payment Systems
October 5, 2016
**Overview: Chicagoland Transit**

- **Chicago Transit Authority (CTA):** Provides bus and rail service in Chicago and 35 surrounding suburbs.
- **Pace Suburban Bus:** Provides fixed bus route, paratransit, and vanpool services in 284 municipalities.
- **Metra:** Provides commuter rail service at 241 stations along 11 lines.
CTA FARE SYSTEM EVOLUTION

1950 (Bus)
1952 ('L')
1995
2002 (Chicago Card)
2004 (Chicago Card Plus)
2013
VENTRA COMPONENTS

- Fare collection system
- Fare media procurement
- Customer account system
- Retail network
- Cash collection (not including bus)
- Gate and device maintenance
- Data collection and reporting
- Customer communication
- Customer service
- Regional integration
  - Pace, RTA, Metra
VENTRA TIMELINE

- August, 2009 – Step 1 RFP issued
- April, 2010 – RFC issued
- November, 2010 – Step 2 RFP issued
- November, 2011 – Contract awarded to Cubic Transportation Systems Chicago, Inc.
  - 12 year contract – 2 yr. development; 10 yr. operations
- September, 2013 – Go Live
  - “Stabilization” period
- July 1, 2014 – Legacy decommissioned
- October, 2014 – Mobile App announced
- November, 2015 – App launch
WHY MAKE THE SWITCH?

- Legacy equipment nearing end of useful life
  - Proprietary system
  - Chip supply dwindling
- High capital costs to replace system - $140 M
  - Readers, Vending Machines, Network devices, etc.
- Focus on core mission of CTA: moving people, not money
- Future-proof system
- Enhance customer convenience
  - Ability to store all kinds of fare products on one card
- State legislation
At launch:

1886 Buses

774 Rail Gates

(Plus 400 VVMs, 1300 retailers)
AREN’T WE ACCOUNT BASED?
COMMUNICATIONS CHALLENGE:

How to communicate the new, improved cutting-edge system that will essentially change very little about how people board a bus or train?
STABILIZATION

- Paused transition timeline
- Demanded more data from contractor to guide prioritization of stabilization efforts
  - Example: transaction times
  - Example: multiple taps
- Immediate retest of the system
- Brought in new project management contractors
- Demanded and received new project leadership at contractor
RIGHT THE SHIP

- Went on public communication offensive
- Ventra performance reports to hold contractor accountable for improvements

**Ventra Performance Metrics**

*March 2014*

The CTA is closely monitoring the performance of the new Ventra fare payment system as the agency moves towards full transition to Ventra on July 1.

Specifically, the CTA is monitoring performance requirements that include ensuring that the average call wait times to speak to a Ventra customer service center operator is five minutes or less, that Ventra all and bus transactions are processed in 2.5 seconds or less, 99 percent of the time, and that vending machines and card readers on both buses and at rail stations have 99 percent availability or "uptime."

The vendor, Cubic Transportation Systems, has continued to meet these performance metrics since the start of the year. This performance report shows that during the month of March, the call center hold time, transaction speed, and equipment availability or "uptime" metrics all exceeded the established performance standards. The CTA will continue to monitor Ventra’s performance closely to ensure consistent performance and will continue to post monthly performance reports online at www.transitchicago.com.

**Tasks**

The following graphics depict total passenger usage segmented by Ventra and legacy modes. As illustrated, the percentage of Ventra taps has grown significantly since September. For the week ending March 29, Ventra comprised 82 percent of total taps.

- Through March 29, there had been more than 146.7 million Ventra taps across the system.

**Active Accounts**

The following data set represents the volume of active Ventra accounts. The graph illustrates a continued upward trend in the number of active accounts since March 1. As of March 31, there were approximately 1.59 million active Ventra accounts. This represents a 7.3 percent increase in active accounts since March 1.

<table>
<thead>
<tr>
<th>Category</th>
<th>Active Accounts (as of 3/31)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ventra A</td>
<td>1,436,400</td>
</tr>
<tr>
<td>Ventra B</td>
<td>277,800</td>
</tr>
<tr>
<td>Legacy/Attendant</td>
<td>6,000</td>
</tr>
<tr>
<td>Other</td>
<td>4,300</td>
</tr>
</tbody>
</table>

The “Other” category in the above graphic and table includes Active and Disabled/Military, Student/Child, O’Hare Employees, etc.

**Cell Center**

The following data sets provide detail on the Ventra Cell Center.

The graph below represents the volume of calls received by the Ventra Cell Center on a daily basis from February 1 through March 31. The data demonstrates a continued decrease in the average daily calls received per month.
STABILIZATION

- Rebuilt customer trust
  - Focused improvement efforts on customer experience
    - Double taps
    - Multiple taps
    - Communication at reader
    - Call Center performance
- Got the system to just work
- Restarted transition with long wind-down
- Final milestone passed “not with a bang, but with a whimper”
## Ventra Current State

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily ridership</td>
<td>1.5 million</td>
</tr>
<tr>
<td>Annual ridership</td>
<td>516 million</td>
</tr>
<tr>
<td>Annual farebox revenue</td>
<td>$587.2 million</td>
</tr>
<tr>
<td>Total accounts</td>
<td>6.64 million</td>
</tr>
<tr>
<td>Active (last 90 days) accounts</td>
<td>2.05 million</td>
</tr>
<tr>
<td>Registered GPR</td>
<td>843k</td>
</tr>
<tr>
<td>Unregistered GPR</td>
<td>748k</td>
</tr>
<tr>
<td>Transit-only card</td>
<td>425k</td>
</tr>
<tr>
<td>Open payments</td>
<td>19k</td>
</tr>
</tbody>
</table>

*Over $1.4 B settled since launch*
### Ventra Current State

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Buses</td>
<td>1,865</td>
</tr>
<tr>
<td>Number of Stations</td>
<td>145</td>
</tr>
<tr>
<td>Number of Entries</td>
<td>221</td>
</tr>
<tr>
<td>Number of Gates</td>
<td>785</td>
</tr>
<tr>
<td>Turnstiles</td>
<td>582</td>
</tr>
<tr>
<td>Swing Gates</td>
<td>128</td>
</tr>
<tr>
<td>High Barrier Gates</td>
<td>75</td>
</tr>
<tr>
<td>Number of Vending Machines</td>
<td>420</td>
</tr>
<tr>
<td>Participating Retail Locations</td>
<td>1,300</td>
</tr>
<tr>
<td>Number of app downloads</td>
<td>950,000+</td>
</tr>
<tr>
<td>Sales Channel*</td>
<td>Jul-16</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td></td>
<td>Payment value</td>
</tr>
<tr>
<td>TVM</td>
<td>$23,497,921</td>
</tr>
<tr>
<td>Retailers</td>
<td>$6,637,055</td>
</tr>
<tr>
<td>Threshold Autoload</td>
<td>$4,890,583</td>
</tr>
<tr>
<td>Mobile Ventra</td>
<td>$5,011,528</td>
</tr>
<tr>
<td>PPB</td>
<td>$4,225,515</td>
</tr>
<tr>
<td>Patron Website</td>
<td>$3,650,044</td>
</tr>
<tr>
<td>Distributor Order</td>
<td>$681,724</td>
</tr>
<tr>
<td>Call Center</td>
<td>$213,675</td>
</tr>
<tr>
<td>Other</td>
<td>$208,302</td>
</tr>
<tr>
<td>Accounts</td>
<td>$138,027</td>
</tr>
<tr>
<td>IVR</td>
<td>$68,330</td>
</tr>
<tr>
<td>MPOS</td>
<td>$37,708</td>
</tr>
<tr>
<td>Institutions</td>
<td>$66,316</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$49,326,728</strong></td>
</tr>
</tbody>
</table>
VENTRA MOBILE APP

- Integrates regional transit systems
- Unlocks the system
  - Puts a Ventra Vending Machine in your pocket
  - Especially of value for bus customers who don’t have access to Ventra Vending Machines at bus stops
- Metra Mobile Ticketing
  - Establishes universal fare payment system
- Transit Tracker
  - Bus and Train Tracker integration
  - Real-time Metra information
    - Integration into mobile ticketing function
- Future enhancements:
  - Regional Trip Planner
  - Virtual Ventra Card
  - Advertising and Promotions
SECOND CHANCE: LESSONS LEARNED

- Extensive testing
  - Committed field testing by project team worked
    - Delay in pricing
    - Transit Tracker issues
    - Behavior of app and employees
  - Beta testing as promotion
    - CUT Group
    - Public
- Not afraid to reconsider assumptions
  - Drive your vendor crazy
- Delayed launch to get it right
VENTRA APP LAUNCH: WELL RECEIVED

Ventra App Proves Popular With Transit Riders On Public Debut
November 20, 2015 6:41 AM By Bob Roberts

“... the response was ‘overwhelmingly positive,’ a sharp change from the problems that plagued the introduction of the Ventra card for months.

Riley Mundt takes the train from Crystal Lake to get to classes at the University of Illinois at Chicago. She’s looking forward to having her monthly pass on her phone. “All my friends keep telling me to [download] it. They tell me it’s really cool,” said Mundt, 21.
Video of bus MV
VENTRA APP LAUNCH: WELL RECEIVED

- 25,000 downloads the first day, over 900,000 to date
**Ventra App Launch: Well Received**

- Over $97.9 million in sales since launch, 4.2 million orders
Ventra App Future Phases

- Integrated Trip Planning
  - Door-to-door trip planning across all three transit agencies
  - Shared-use integration?
- Advertising and Promotions
- Virtual Ventra Card
Ventra: Mobile Observations

- Account + Smartphone = anything
- Customers expect mobile
- Customers want to pay a fare by phone
  - Needs of transit providers and wants of customers must be balanced
- Transit is an untapped resource to drive adoption
- Treat transit differently
  - Transit is not retail
LESSONS LEARNED

- Focus on customer experience first and foremost
  - Impossible to over-communicate with customers
  - An account-based system is different
- Treat Special Fare Programs as their own major project
- Ensure contractual levers are in line with organizational needs and priorities
- Take advantage of data to guide deployment process
  - Begin internal conversations early about data use
- Test, test, test
  - Launch when ready – first impressions matter
- Customers expect and want a mobile experience
- Account-based transition is worth it