Rider Happiness Benchmarking Report

Spring 2021—U.S. edition

Prepared by

transit

ABOUT THE RIDER HAPPINESS BENCHMARKING PROGRAM

By distributing surveys in-app to our representative sample of riders spanning hundreds of agencies across North America, *Transit*'s Rider Happiness Benchmarking (RHB) program offers an industry-leading set of metrics. *Transit* offers a subscription service for agencies to receive detailed, local quarterly survey results on key customer satisfaction indicators. Participating agencies sit on the program's steering committee to influence questions asked in each survey. The goal is to help public transit agencies both benchmark for inter-agency comparison and amass longitudinal data to track their own performance over time.

Agencies such as Pierce Transit (Tacoma, WA), GDRTA (Dayton, OH), STO (Gatineau, QC), and WMATA (Washington, DC) are already subscribers. While only subscribers will have access to all local, agency-specific data, *Transit* continues to publish topline national results for the U.S. and Canada publicly. The next RHB survey is scheduled to be launched in the *Transit* app in late July 2021.

3 EXECUTIVE SUMMARY

6 SURVEY RESULTS: US

6 RIDING DURING THE PANDEMIC
8 MODE SHIFT
9 PERCEIVED RISK OF RIDING PUBLIC TRANSIT
12 NET PROMOTER SCORE
15 AGENCY SATISFACTION RATINGS
30 COVID-19 RESPONSE

32 RIDER DEMOGRAPHICS

32 VACCINATION PROGRESS FOR TRANSIT RIDERS
33 CAR OWNERSHIP
34 AGE
35 RACE
36 INCOME
36 ACCESSIBILITY
37 GENDER
38 OCCUPATION

39 BACKGROUND

39 GOALS
39 METHODOLOGY
41 ABOUT TRANSIT

EXECUTIVE SUMMARY

As shots get in arms and our cities slowly start to reopen, many transit agencies across the U.S. and Canada are getting ready for their COVID recovery. A key part of that recovery is being in touch with how riders are feeling.

At *Transit*, we use our platform to get regular updates from riders, helping agencies gauge rider sentiment about service, safety, and more. With this information, agencies can better understand what riders need, their future plans, and their perceptions of public transit. Our surveys represent the sentiment of people who are actively riding the transit system in their cities, not those who plan to return to public transit in the future. The results yield some surprising insights and highlight potential low-cost opportunities for agencies.

This report examines survey results in detail, including rider satisfaction ratings for local transit agencies, Net Promoter Scores, and more. Larger themes that arose from the survey results include:

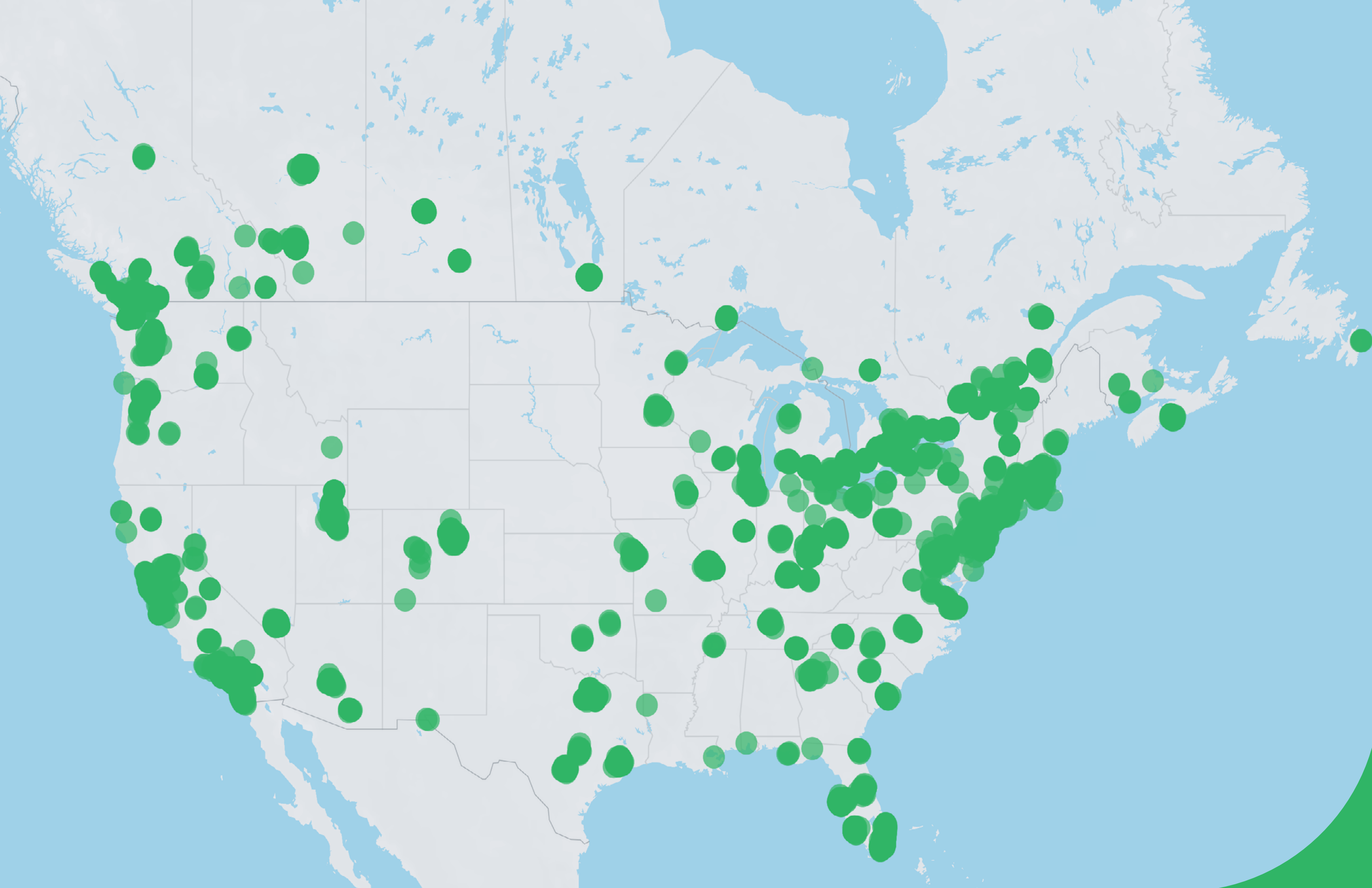
- Riders are incrementally returning to transit. They're still riding less than before the pandemic, but they're also hopeful about riding more in three months. In November, 50% of riders indicated they were riding less frequently, while in April, 32% of riders now say they are riding less than before the pandemic.
- Respondents are beginning to plan for recovery. Only 11% of riders will not return to public transit until the pandemic ends, down from 24% in November. 10% of respondents said they will return to their prior riding patterns by July.
- Riders are generally more satisfied with their transit agencies than they were in November. Among selected agencies, the average Net Promoter Score (NPS) in November was -12, improving to -4 in this most recent survey. But NPS continues to vary significantly across the more than 100 agencies in our survey with a sufficient sample size for consistent tracking.

👀

Want to see how your agency compares?

Reach out to partners@transitapp.com to subscribe to quarterly reports.

- Riders are not shy about what would get them to ride more:
  - Almost 50% strongly agreed they would ride more often if agencies stepped up cleaning of vehicles and distributed masks.
  - 59% of users said they would ride transit more often if agencies improved safety on board vehicles, and 67% stated they would ride more if agencies improved safety at transit stops.
  - A whopping 80% of users stated that they would ride more often if trip information was more accurate. This, too, varies significantly by agency, with some already receiving high marks on the quality of their real-time information.
  - Riders stated they would ride more often if their agencies made bus and train departures more frequent (86%), if they sped up service (77%), and if they created routes that were more convenient for riders' travel needs (75%).
- Riders are just as concerned about COVID-19 on public transit as they were 6 months ago, but some agencies are doing better than others at making riders feel that they are being protected from coronavirus onboard. 63% of U.S. respondents reported that they are satisfied with agency safety measures during the pandemic. This has not changed significantly from November results, where 65% reported they were satisfied.
- Public transit still has a perception problem. A surprising 23% of respondents, up from 16% in November, said that public transit is riskier than a set of listed indoor activities, such as large indoor gatherings or grocery shopping.
- Riders are getting vaccinated at high rates, beating trends from the general population. Across respondents in April, 61% reported having received at least one vaccination, and 39% were fully vaccinated. There were no differences in vaccination rates between Spanish and English speaking respondents.
- April 2020's extreme racial disparity seems to have lessened incrementally over time, although people of colour are still disproportionately represented compared to both the population at large and pre-pandemic ridership.



30k

RESPONSES IN NORTH AMERICA

20k+

FROM THE US

9k+

FROM CANADA

SURVEY RESULTS: U.S.

RIDING DURING THE PANDEMIC

The majority of the Rider Happiness Benchmark survey is about measures that can be used during this period of recovery, and into the new normal. It's especially timely to consider some pandemic-specific questions, as agencies look to understand what's ahead over the next 3 to 6 months.

We've surveyed *Transit*'s users three times since the beginning of the pandemic.[1] Unlike in the two previous surveys, many more respondents are now reporting that they are riding the same or more than they were prior to the pandemic, with 68% of U.S. respondents telling us they are back on transit as much as they were prior to the pandemic (up from 50% in November).

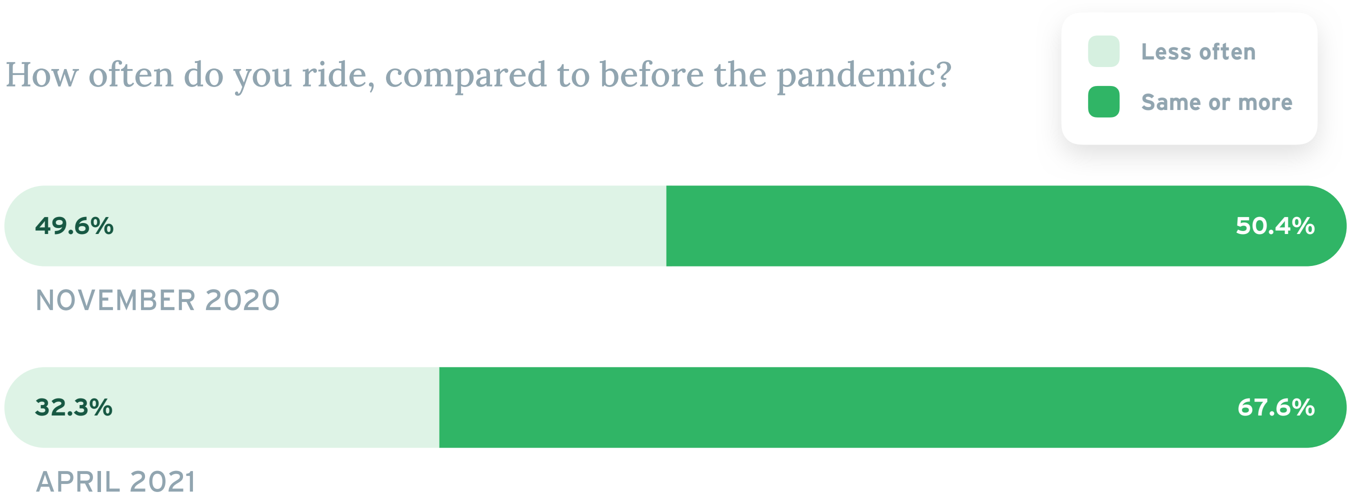
According to our APTA ridership dashboard, ridership nationally from November to April was up only 8% from 36% of pre-pandemic demand to 44%, suggesting that, overall, people are returning but not riding as much as they were prior to the pandemic.

82% of U.S. respondents took the survey in English and 14.5% took it in Spanish. Amongst Spanish speakers, 79% of respondents said that they were riding transit as often as (or more than) before the pandemic, 11 points higher than the U.S. average.

1 These surveys predominantly represent people who are, at the time of the survey, either still riding or still interested in riding public transit, and not people who have given up on public transit altogether. This is because respondents take the survey by tapping on a push notification or in-app banner, meaning that people who stopped using the app to ride public transit between April and November are underrepresented.

People who own cars are more likely to report riding less, while people who do not own cars are more likely to report riding with the same frequency as before the pandemic. This pattern did not significantly change between the two prior surveys (April and November 2020), but in the April 2021 responses, all riders are reporting more of a return their pre-COVID levels of transit usage (70% of non-car owners now - up from 54% - and 53% of car owners, up from 38% in November). The percentage of non-car owners now riding is high. Among people who are using public transit, over 30% are riding less frequently than they were according to our results. This speaks to changing travel patterns as a result of the pandemic and we suspect this number may go down as more people start to commute again. Also, the measure still lags for car owners, suggesting that some car-owning riders may not be returning to transit for a while.

How often do you ride, compared to before the pandemic?



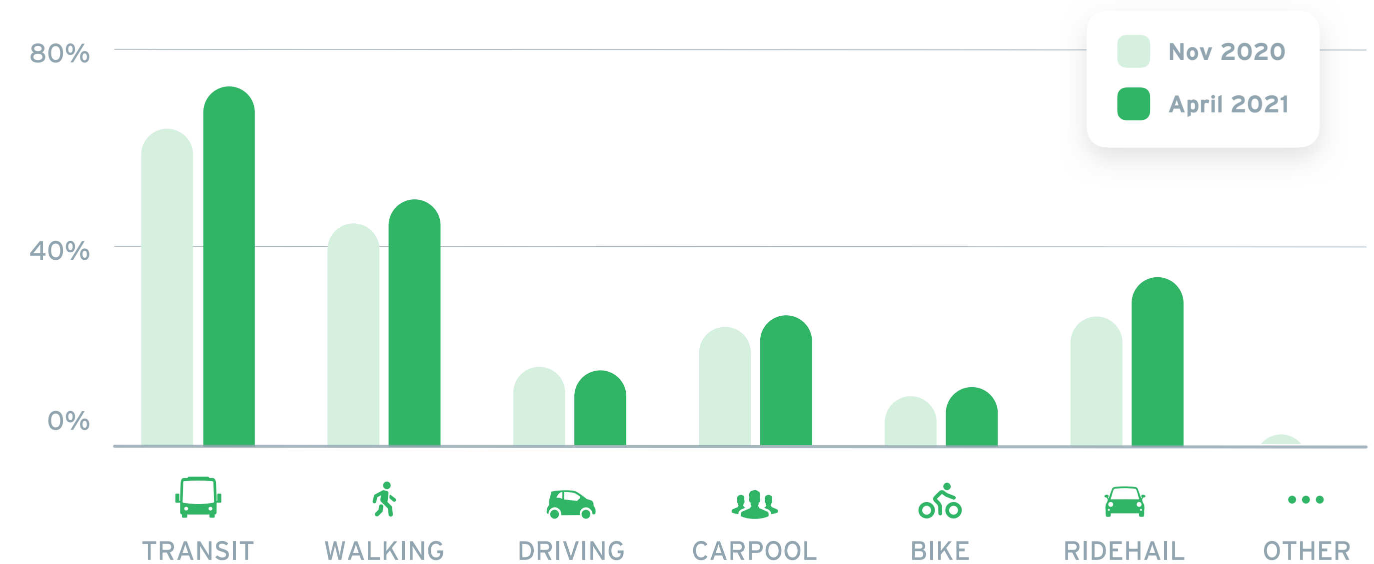
Looking for stats about your riders?

Reach out to partners@transitapp.com to learn about subscribing to regular rider experience reports.

MODE SHIFT

We asked users which modes they utilized more frequently than before the pandemic. Interestingly, in November 64% of respondents reported that they rely on public transit more during the pandemic. In this survey 6 months later, that number is up to 73%. Walking increased slightly from November, as did biking, carpooling, and ridehail.

Which modes do you rely on more than before the pandemic?



PERCEIVED RISK OF RIDING PUBLIC TRANSIT

Due to the fears at the outset of the pandemic that overstated the actual risks of riding transit, public opinion had been set to believe that transit was dangerous. We continue to be curious how riders perceive the risk of contracting COVID-19 on public transit, so we included the question: "*Check all that apply. Where do you feel at greater risk of contracting COVID-19 compared to riding public transit?*". We use this question as a barometer of how much of that perception has affected ridership, and to give agencies a sense of whether their efforts to counteract these false perceptions have been successful.

Respondents could choose multiple options, so percentages represent the portion of users who think that the given activity is riskier than riding public transit.

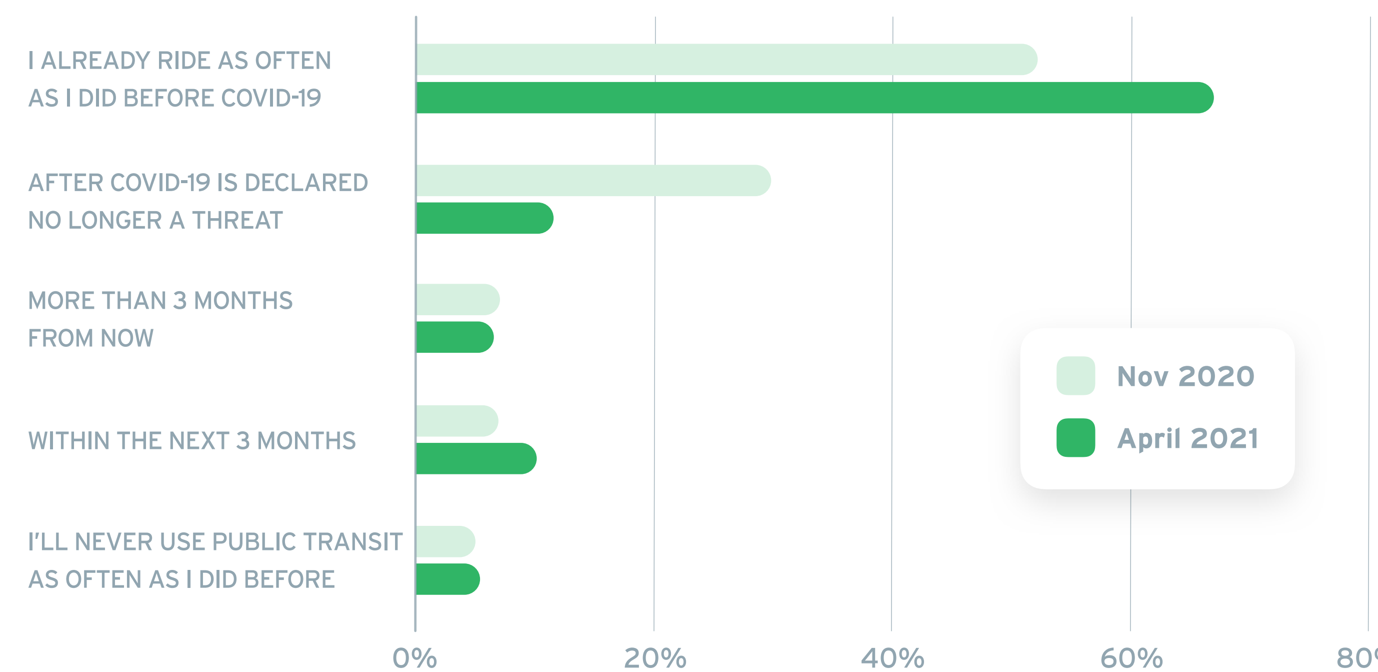
There is no single, consistent source of COVID-19 contact tracing to estimate an empirical risk level for each of these activities. There is evidence, however, that very few COVID-19 cases traced back to contact on public transit (Joselow, Maxine, "There Is Little Evidence That Mass Transit Poses a Risk of Coronavirus Outbreaks", *Scientific American*, 28 July 2020).

The results from this question demonstrate that public transit still has a perception problem. A surprising 23% of respondents said that public transit is riskier than all of the given activities, up from 16% in November — that's a substantial fraction of riders who increasingly feel safer at the gym than on public transit. And only half of respondents thought a large indoor gathering, such as a wedding, is riskier than riding public transit!

Percentage of riders who consider transit less risky than...

- In November, 53% of respondents said they were riding with the same frequency as they did before the pandemic. This is now up to 69% of respondents as of April. Again, this is an important reflection of the sampling frame for this survey: it consists of people who have *Transit* on their phone, with a bias towards those who are actively using the app, so current riders are disproportionately represented.
- Fortunately, U.S. respondents are beginning to plan for recovery as only 11% of them will not return to public transit until the pandemic ends (down from 24% in November). This suggests that riders from November have begun riding more as the U.S. vaccinates more people. Additionally, 10% of respondents said they will return to public transit within the next three months (May through July 2021).
- Only 4.7% of all respondents said they will never return to public transit.

When riders will resume using public transit



In April 2021, 55% of respondents said they already commute to school or work by public transit at least once per week. We asked what they expected to do in July 2021 in order to get a better understanding of the pandemic recovery process. Overall, 64% of respondents expected to commute at least once per week in July. As further evidence of the fact that app users and respondents are already overwhelmingly returning to using public transit, only 21% of respondents said they currently worked or attended classes from home exclusively, and 24% stated they expected to continue to be working from home full time in July 2021. This change is driven by an anticipated reduction in riders that expect to remain unemployed after three months, and respondents who expect to return to school or work at least 3 days per week.

Current and expected work or study commuting patterns

NET PROMOTER SCORE

As an overall indicator of how transit systems are doing, we use the Net Promoter Score. This allows agencies to have one number with which to measure their progress against themselves and their peers over time. The Net Promoter Score is a scoring system common in marketing that uses a 10-point scale. The calculation is the percentage of responses of 9 or 10 minus the percent of responses of 6 or below. In the marketing world, a common rule of thumb is:

- → **-100 to 0** Needs improvement
- → **0 to 30** Good
- → **30 to 70** Great
- → **70-100** Excellent

Among this group of agencies, the average NPS in November was -12, improving to -4 in this most recent survey. As ridership slowly returns post-pandemic, *Transit* looks forward to determining the level of stability of this measure over time.

Interestingly, these results are not geographically distributed: it really does matter what individual agencies are doing. For example, VTA and Muni in the San Francisco Bay Area are neighbours and may share an overlapping set of riders, but riders on VTA are much more likely to recommend their agency to a friend than riders on Muni.

For reference, Internet service providers like Comcast come in around -1 NPS, health insurance companies at 13, and airlines come in at 44. Netflix receives 62. (Source: Net Promoter Benchmarks)

Spanish speakers tend to be more likely to recommend their agency to a friend: their average response was an 8.2 out of 10, while English speakers rated their agencies at only a 6.8 of 10 on the same question.

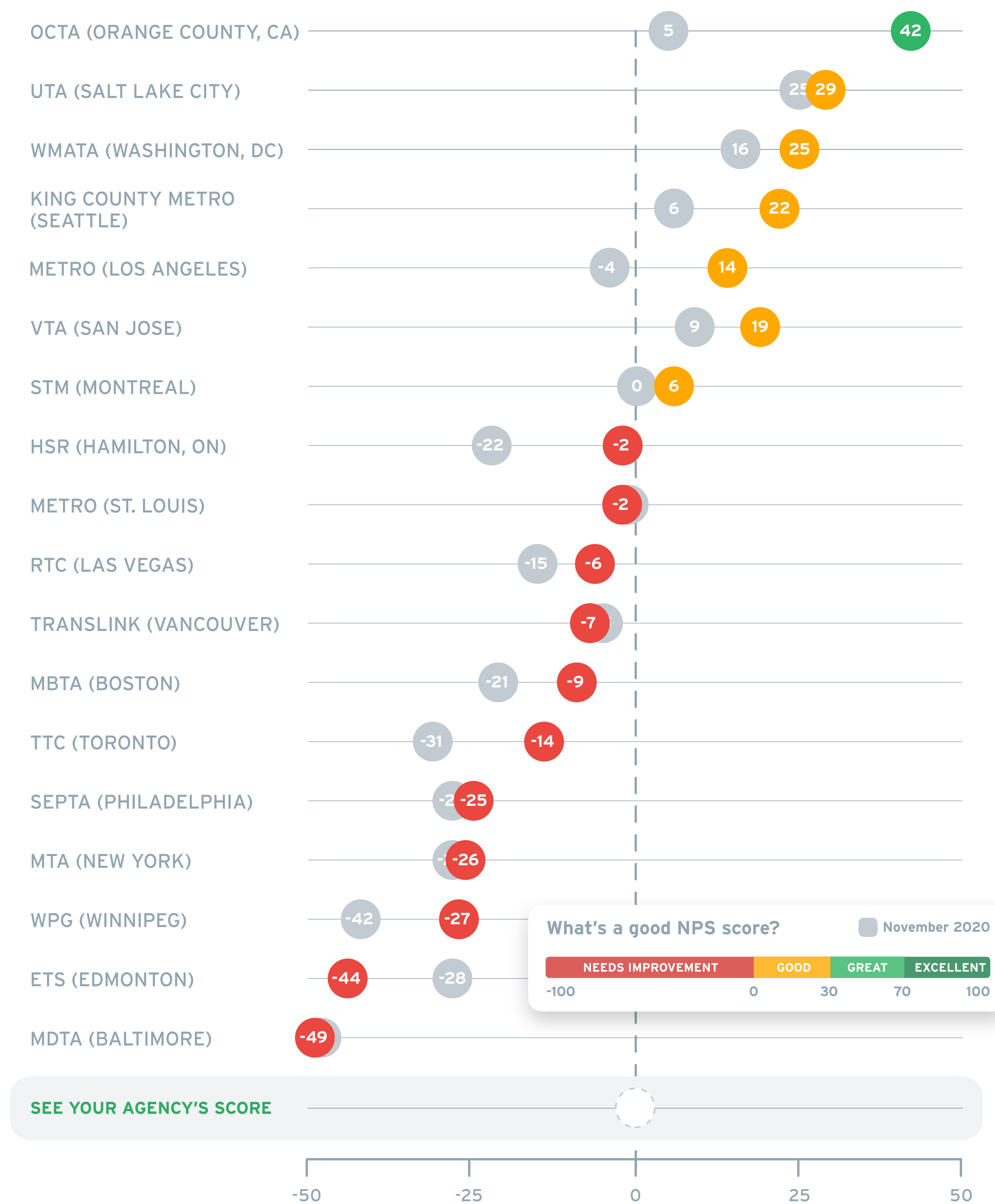
Looking at individual agencies can reveal some useful trends. For example OCTA in Orange County, CA, went from being barely “good” in November to solidly “great.”

- Almost half of respondents rated OCTA a 10 of 10 when asked if they would recommend OCTA to friends and family (48%) in April, while in November only 31% of respondents rated OCTA this highly.
- OCTA also saw improvements in how riders rated the agency’s service offerings in response to COVID-19 (3.9 in November vs. 4.2 in April), as well as improvements to rider perception that the agency is doing the best it can with available resources (3.76 in November vs. 4.24 in April).
- The April survey received almost double the number of responses from OCTA riders as compared to November. While there may be some external factors related to the types of users filling out the survey, the demographic composition (age, gender, income, race, etc.) remained consistent from November to April.

On the other hand, Edmonton Transit System in Alberta is one of the few agencies that saw a drop in rider satisfaction over the course of six months.

- Edmonton released a major bus network redesign with new routes and major service changes at the beginning of April. During the survey, riders were still getting used to the new routes and expressing their displeasure with some of the changes.

How likely are riders to recommend their transit agency to a friend?



AGENCY SATISFACTION RATINGS

To dig deeper into these top line trends, and help agencies identify focus areas, survey respondents were asked to rate their local agency on a five-point scale across five categories: communications and reliability, safety, cleanliness, data and infrastruwcture quality, and schedules and routes. On both communications and reliability measures, agencies have seen declines across the board from November to April. This could be attributed to some riders returning to different systems than they left in March 2020, as agencies have changed their service patterns or partially restored service. The secret to increasing these numbers may lie in new initiatives, or in better communicating existing initiatives to returning riders. Across all of the measures for safety improvements, data improvements, and network changes, the most important factors that respondents said would encourage them to ride more often were making departures more frequent (avg rating 4.5, standard deviation of 0.1) and improving the accuracy of real-time information coming from vehicles (avg rating 4.31, standard deviation of 0.17).

Baltimore's MDOT MTA ranked highest on the increased frequency measure with an average rating of 4.6, while even the lowest-ranking agency, TriMet in Portland, OR, scored above 4.0, at 4.2. Baltimore also rated highest on the request to improve real-time accuracy (4.6), and Portland the lowest (3.9). Respondents highly value frequency of service, which requires investment at every level of government. Real-time data accuracy improvements, on the other hand, can be achieved incrementally and requires much less expensive investments on the agency's part. Many other factors were considered important, but were less significant than increasing frequency and increasing data accuracy.

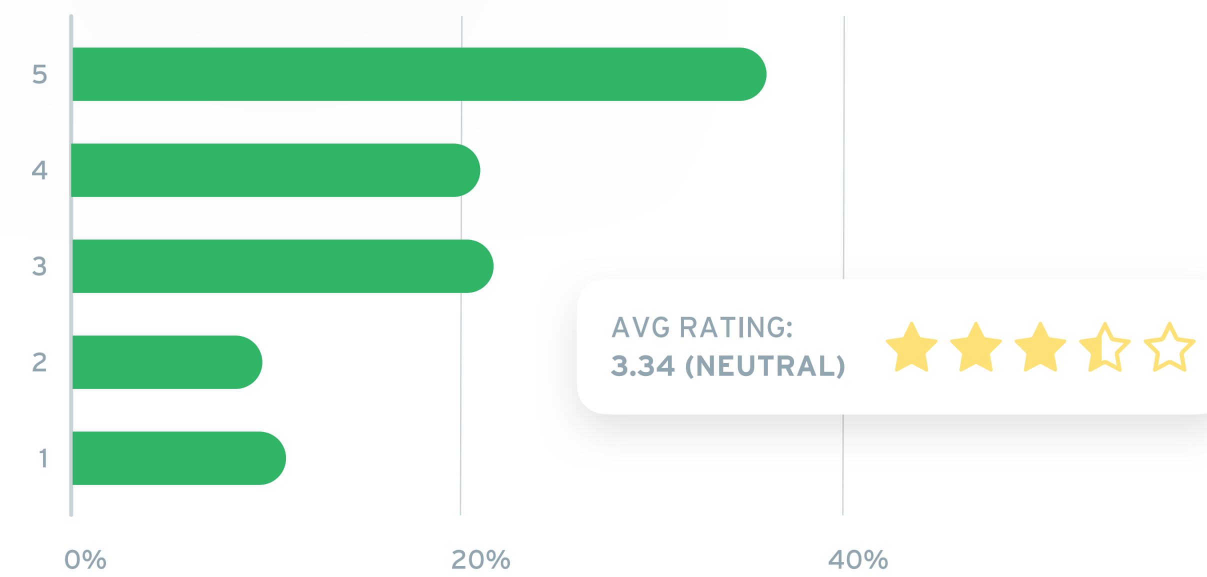
How's your agency doing?

Subscribers get detailed quarterly reports. Reach out to partners@transitapp.com to learn more.

Agency satisfaction
Agency alerts

Do riders agree?

"I feel well informed by my agency about route disruptions and changes."



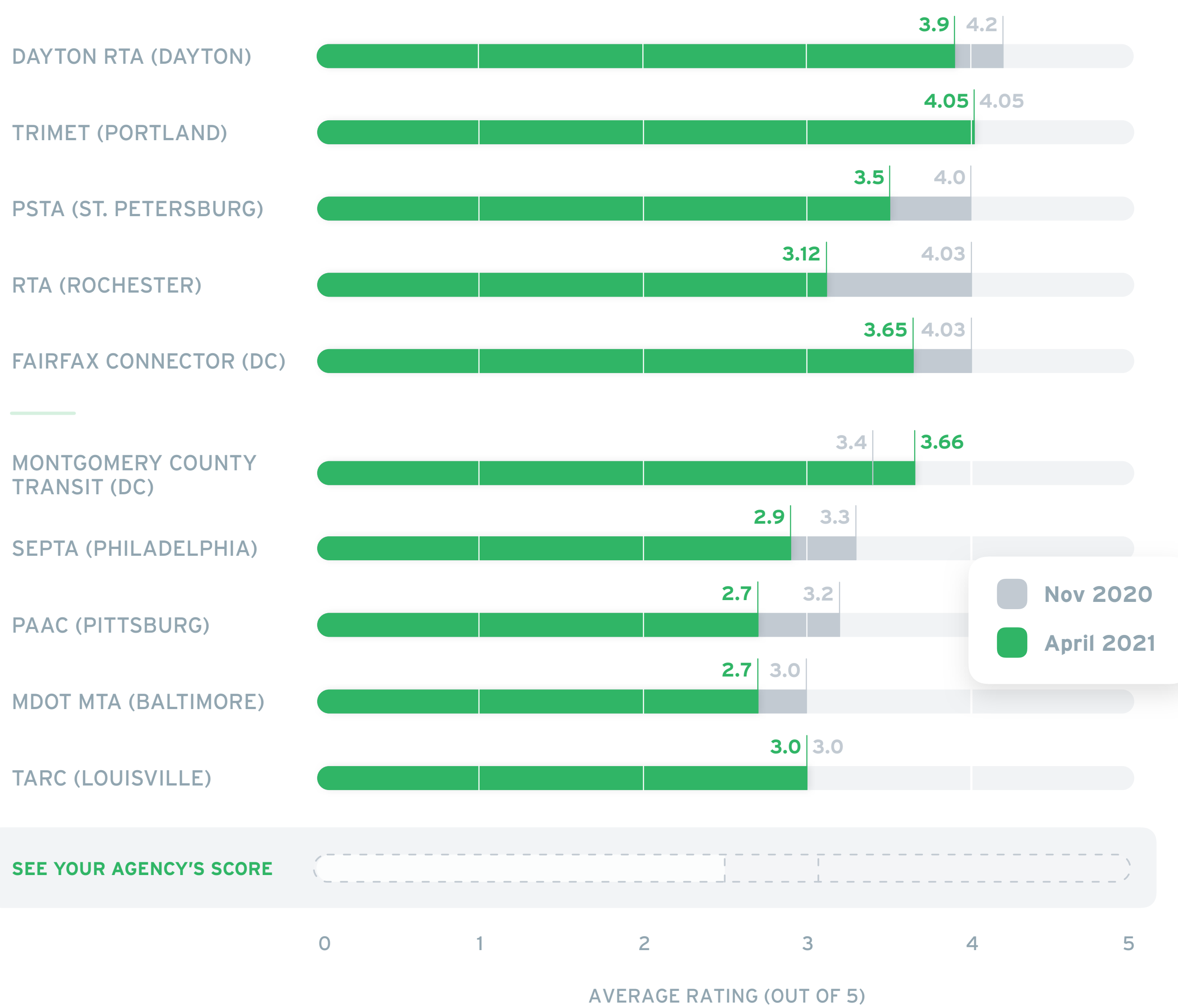
In April 2021, across North America, *Transit* users felt lower satisfaction with agency alerts and updates than in November of 2020. On average, scores reduced by a quarter of a point from 3.64 to 3.34. Of the 50 agencies with the most survey responses, only four agencies improved on this measure while the others declined. The agencies with improvements were Montgomery County, MD, RTD in Denver, CO, TARC in Louisville, KY, and VTA in San Jose, CA. Of those, VTA was already towards the top of the ratings.

Generally, West Coast agencies had a less severe drop in the ratings for this measure, while agencies on the East Coast experienced more significant drops in the past six months. Interestingly, MTA riders in New York responded differently based on the type of service they utilize. For example, Manhattan bus riders made a significant drop in their ratings between November and April on this measure (3.82 to 3.08), while bus riders in Queens were more consistent in their ratings (dropping slightly from 3.34 to 3.33). DDOT in Detroit saw a significant drop in rider satisfaction, as riders reported a somewhat positive 3.5 in November but dropped to 2.6 in April.

Spanish speakers tend to be more satisfied with their agency's communications and updates than English speakers. In April, Spanish speakers rated agencies 3.64 (versus 3.3 for English speakers), but this is still much lower than the 4.0 that Spanish speakers rated agencies in November.

Rider satisfaction: agency alerts

Highest- and lowest-rated agencies from November 2020



Agency satisfaction

Agency reliability

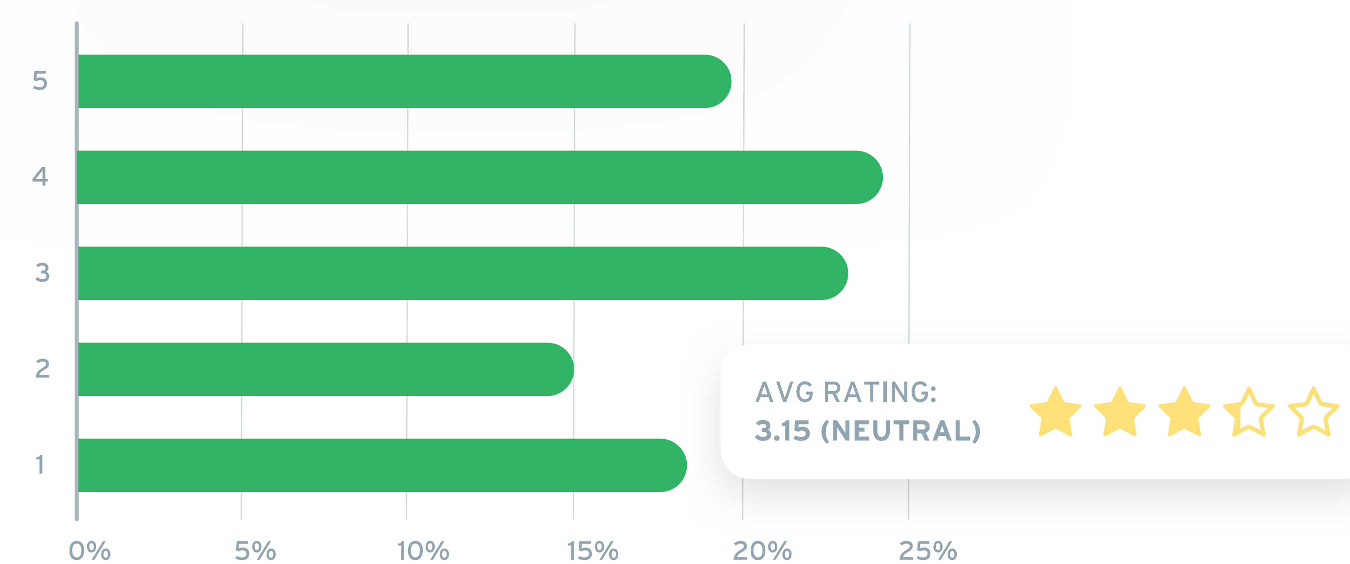
In April 2021 across North America, *Transit* users felt lower satisfaction overall with agency performance on reliability as compared to November (3.1 in April vs. 3.4 in November). Only 8% of agencies improved on this measure in the past six months (Montgomery County, MD, VTA in San Jose, CA, KCATA in Kansas City, MO, and OCTA in Orange County, CA). KCATA and OCTA have been working over the past year to make improvements to their real-time data with our partner Swiftly, so it is possible that this is having an impact on this measure for these agencies.

More generally, the overall reduction in satisfaction with agency reliability could be attributed to a change in the users of the app, who may be returning to public transit for the first time in the past year and finding the system degraded from their previous experiences. The biggest change came for Rhode Island's RIPTA, which experienced a significant drop in rider satisfaction, with agency reliability falling from an average rating of 3.75 in November to 3.25 in April.

Spanish speakers rated agencies higher on reliability than English speakers (3.5 vs. 3.05), but this is down from November, when they rated agency reliability at 3.8 (vs. 3.3 for English speakers).

Do riders agree?

"My agency is on time and reliable."



Rider satisfaction: agency reliability

Highest- and lowest-rated agencies from November 2020

After the survey we ran in November, we received feedback from agencies on the Rider Happiness Benchmarking program steering committee that they could use more specific satisfaction metrics to better make decisions about adjusting service and making improvements for their customers. So in the April survey, we introduced a new set of questions asking about a respondent's most recent transit ride. Of all respondents, 93% said they had taken transit in the past two weeks. This survey group represents users who are actively riding the transit system in their cities, not those who plan to return to transit in the future.

For those riders who said they had ridden transit in the prior two weeks, Transit asked a series of questions about their most recent trip specifically on a five-point scale. The responses are divided into the following three categories: safety and cleanliness, data quality, and planned schedules and routes.

Agency satisfaction

Safety and cleanliness

Transit asked for feedback on the performance of the agency's driver/operator, as well as how they felt about safety throughout their trip. Notably, people feel positively about operators, but those feelings do not have an impact on how safe they feel.

Other measures of perception of safety are highly correlated. Agencies that performed well on safety on board also performed well on how safe respondents felt while waiting for their bus or train to arrive (correlation coefficient = 0.9). However, respondents almost universally rated their feeling of safety on the vehicle higher than while waiting for the bus/train. There is also a strong correlation between how safe respondents felt on board and mask compliance on board (correlation coefficient = 0.87). Therefore, we created an aggregated "safety score" to bring together all three of these measures for an individual agency to simplify the information and better compare agencies to each other.

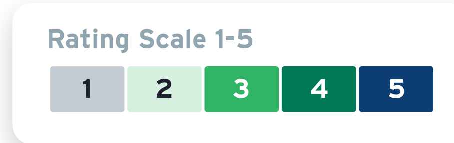
Questions:

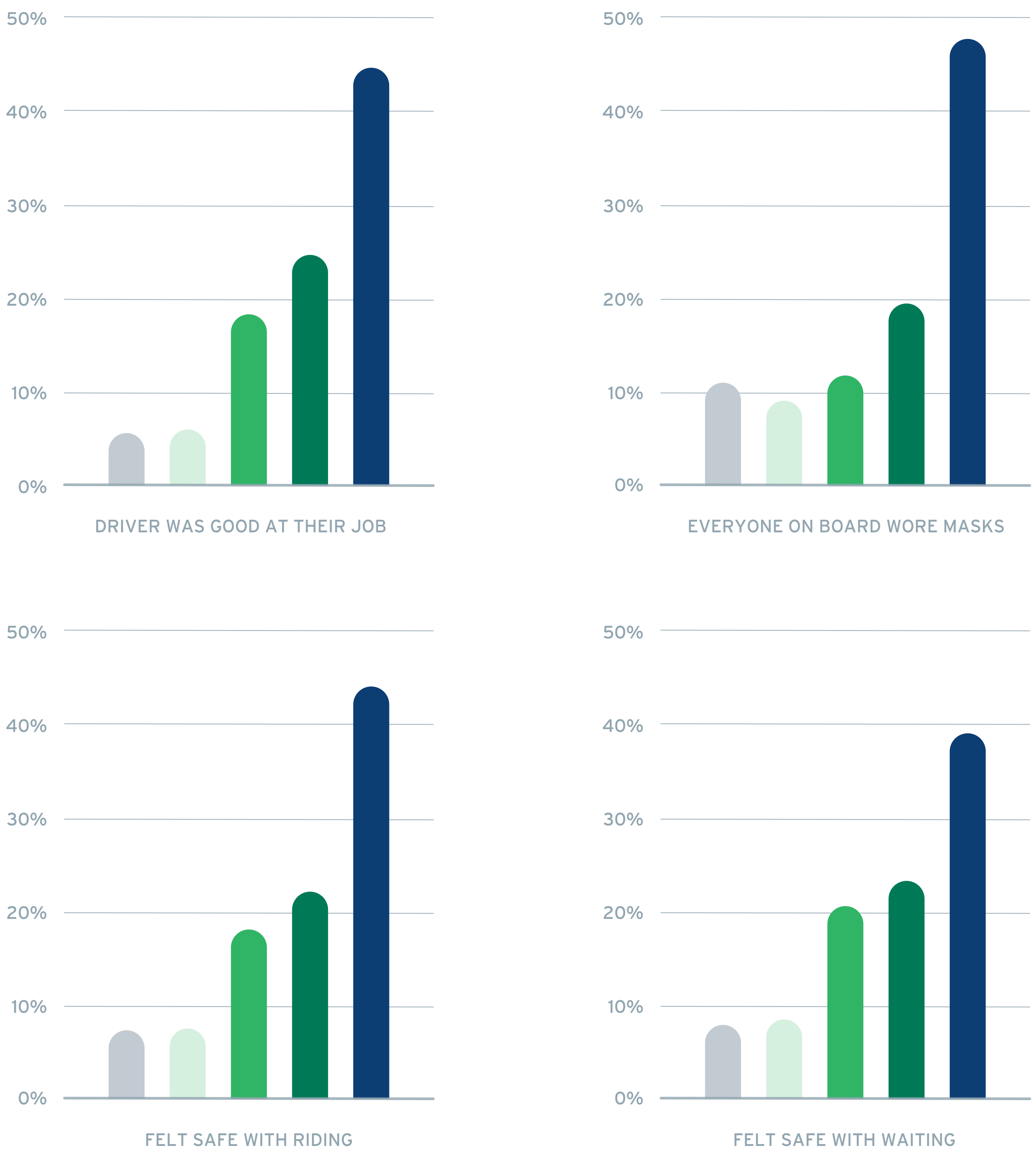
- *"My driver/operator was good at their job"*
- *"Everyone on board was wearing a mask"*
- *"I felt safe while riding"*
- *"I felt safe while waiting for my bus/train"*

Using this aggregated safety score, respondents for RTA in Dayton OH, VIA Metropolitan Transit in San Antonio, TX, and Miami-Dade Transit in Miami, FL, reported feeling the most comfortable with every element of riding transit, from mask compliance to feeling safe on board and at transit stops. SEPTA in Philadelphia, MTA New York City Subway, and MDOT MTA in Baltimore scored lowest on this measure. Generally, the agencies that scored well on safety do not have any below-ground transit stops or stations and are in warmer/temperate climates where riders can feel more comfortable waiting for their vehicle and on-board vehicles.

Satisfaction ratings for U.S. agencies

Safety and cleanliness





Two-thirds of respondents agreed or strongly agreed that they felt safe while riding transit, while slightly fewer respondents agreed that they felt safe while waiting for their bus (average rating for safety onboard was 3.88 while safety at stops averaged 3.77). The individual safety factor with the lowest average score from respondents was how comfortable riders felt while waiting at their bus or train stop/station. Respondents from smaller DC-area agencies (Fairfax County and Montgomery County) reported the highest safety ratings while onboard and the highest overall safety score, while MTA New York City Subway and LA Metro Rail scored lowest on overall how safe their riders felt. Interestingly, those riders felt safer waiting for trains on the platforms than they did while in the vehicles. The lower an agency scores on onboard safety, the higher the likelihood that their riders will also feel less comfortable waiting for the vehicle to arrive.

Almost 70% of respondents across the U.S. agreed or strongly agreed that their vehicle driver was good at their job. Overall, respondents gave agencies a 4 out 5 rating (the highest average in this category). TriMet in Portland, OR, scored highest on this measure, while MDOT MTA in Baltimore scored lowest.

Mask compliance sees the greatest variation between agencies. Overall, riders had greater divergence in their responses when asked whether everyone onboard was wearing a mask; 11% reported that not everyone on board was wearing one. Responses were polarized, with 48% of respondents providing a score of 5 of 5 on this measure.

There was only one set of riders in the U.S. that reported an exactly neutral average rating of 3.0 for this question: LA Metro rail riders in Los Angeles. 40% of these respondents gave the agency a 1 or 2 rating on this measure, while only 23% rated the agency 5 out of 5. Surprisingly, LA Metro bus riders rated this question a 3.56, so even within the same agency different riders have different perspectives on overall safety. The overall average rating for the mask compliance question across the U.S. was 3.93.

Safety and cleanliness measures to increase ridership

Respondents were asked to report how strongly they felt about safety and cleanliness measures, and the impact that would have on their desire to ride transit more frequently.

Questions:

I would ride more often if my agency...

- → *Improved safety on board*
- → *Improved safety at transit stops*
- → *Improved cleanliness on board*
- → *Distributed masks to everyone who needs one on a vehicle*

The survey shows that agencies can encourage more ridership by improving the cleanliness of the vehicles and distributing masks to everyone who needs one on a vehicle. Almost 50% of respondents strongly agreed they would ride more if agencies cleaned the vehicles more and distributed masks. Mask distribution was particularly important to MTA bus riders in New York and Miami-Dade Transit riders, who rated mask distribution most highly when asked what would get them to ride more often.

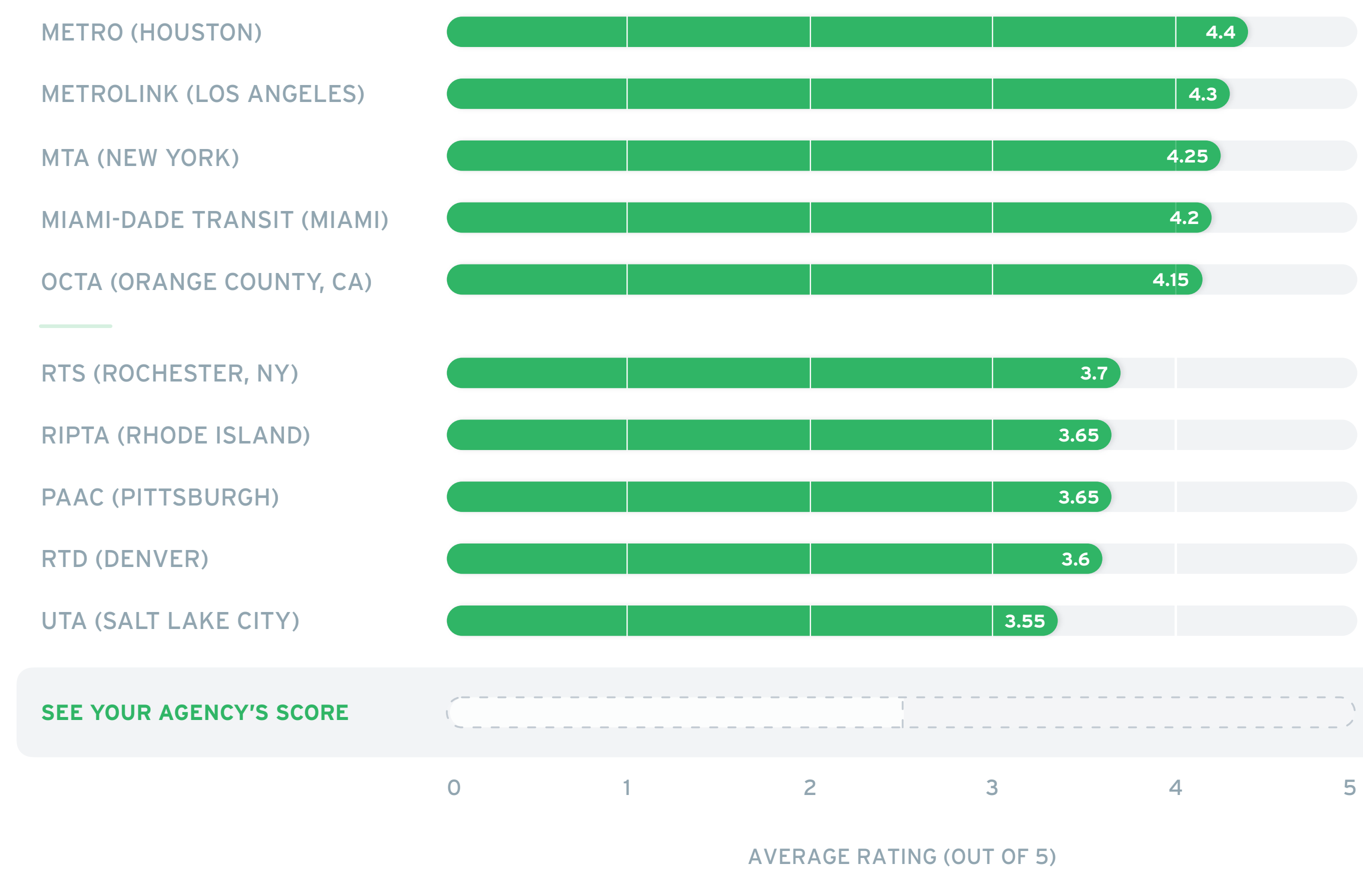
Vehicle cleanliness was a top concern in this category for LA Metro rail and bus riders, SEPTA bus riders, and MTA New York City Transit riders. When agencies have a lower rating on this question, it suggests that these agencies are performing better on this measure such as UTA in Salt Lake City, UT, PSTA in St Petersburg, FL, RTD in Denver, CO, and COTA in Columbus, OH. These agencies have had success in communicating their cleaning measures to riders, and it shows in their ratings on this question.

In terms of safety, 59% of users said they would ride transit more often if agencies improved safety on board vehicles, and 67% stated they would ride more if agencies improved safety at transit stops. Respondents showed little variation in the answers to the question about bus stop safety, with an average rating of 3.83 and a low standard deviation. Universally, respondents suggest that an investment in improving the experience of waiting for public transit will result in more ridership. This continues to match research and recommendations from industry experts including journalist David Zipper, who stated "sometimes a new bus shelter is a better investment than flashy new technology," and who referenced Alon Levy's Little Things That Matter: Bus Shelter.

Agencies that performed the best on this measure were UTA in Salt Lake City, UT, Rhode Island's RIPTA, Port Authority in Pittsburgh, PA, and RTS in Rochester, NY. Agencies that should consider making more investments in their riders' perception of safety at stops are MTA New York City Transit, LA Metro, OCTA in Orange County, CA, and Miami-Dade Transit.

Rider desire for improved safety at transit stops

Riders who want stop safety improvements the most and the least, April 2021



Agency satisfaction
Data and infrastructure quality

Questions:

- *"I was able to get to my destination in the amount of time I expected"*
- *"The predictions in the app for when the vehicle was arriving were accurate"*
- *"My stop/station provided a good place to wait"*

Transit is devoted to ensuring that riders have as much accurate information as possible about their transit system. We work with transit agencies to provide feedback on data quality from on-board vehicle location, arrival predictions, and capacity systems. The results of this survey indicate that accurate information is highly valued by riders. On their most recent trip, 21% of respondents reported that they were unable to get to their destination in the amount of time they expected, and more than one in four respondents stated the arrival predictions in the app, which in most cities *Transit* receives from transit agencies, were inaccurate.

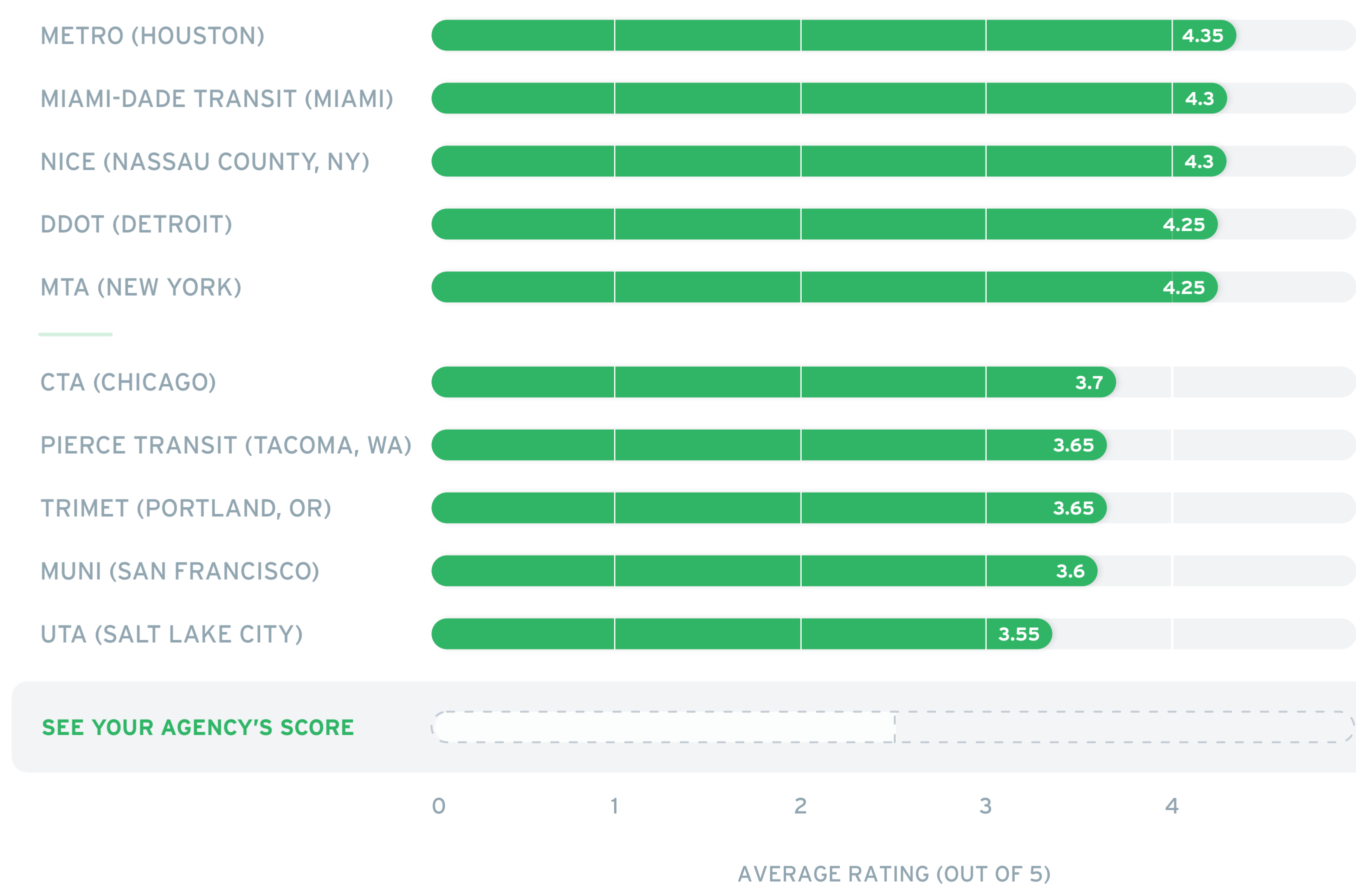
The pandemic has significantly changed traffic patterns. Many agency predictions and schedules haven't been modified to match the new normal, leaving passengers with lower-quality information about how long it will take to get where they are going. Some buses are moving along much faster than they were, while others are more delayed due to budget constraints and cancelled trips caused by operator shortages.

Satisfaction ratings for U.S. agencies
Data and infrastructure

Additionally, physical infrastructure investments are important to *Transit* users: Almost 50% of respondents reported that their stop/station did not provide a good place to wait for their vehicle to arrive, with the average rating of U.S. agencies slightly better than neutral at 3.5. Rider responses to this measure are positively correlated with their feelings of safety at transit stops (R= 0.83). However, average infrastructure quality ratings tended to be lower than those for safety.

Whether or not people currently feel safe at bus stops, they overwhelmingly want better ones, and indicate that bus stop improvements will make them ride more. 69% of respondents reported that they would ride more if agencies improved the quality of the transit stop infrastructure (average rating 4.1). That's true with the agencies that rated highest for safety at stops, including VTA in San Jose, CA, WMATA in Washington, DC, VIA Metropolitan Transit in San Antonio, TX, and the lowest-rated on safety, including Detroit DOT, MDOT MTA in Baltimore, and SEPTA in Philadelphia.

Rider satisfaction: "My stop/station provided a good place to wait"
Highest- and lowest-rated agencies, April 2021



Data accuracy and infrastructure measures to increase ridership

Respondents were then asked to report how strongly they felt about data accuracy and infrastructure measures and the impact that would have on their desire to ride transit more frequently.

Questions:

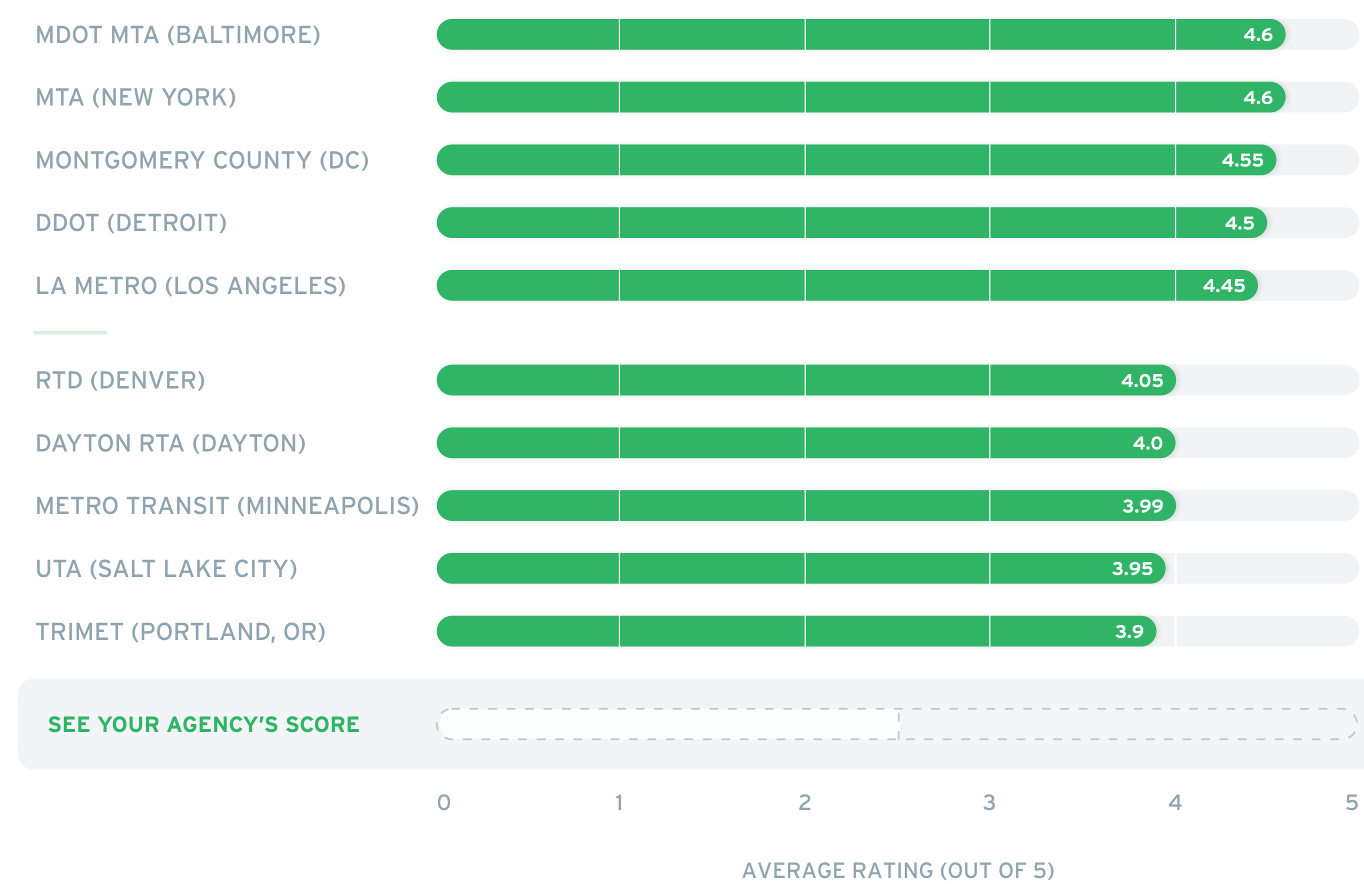
- *I would ride more often if my agency...*
- *Improved the accuracy of real-time information*
- *Made it easier to buy and use tickets*
- *Improved the quality of the transit stops I use*

The biggest impact agencies can have in encouraging more ridership in the data/infrastructure category is to improve the accuracy of real-time information (average rating across agencies was 4.34). A whopping 80% of users stated that they would ride more often if the information was more accurate. The agencies with respondents who said it would make the biggest difference for them are also the agencies where riders reported the most inaccurate information: MDOT MTA in Baltimore's users felt the most strongly that improved accuracy would encourage them to use the system more (average rating 4.6), essentially tied with MTA New York City Transit (4.6), and Detroit DDOT (4.5). Respondents for TriMet in Portland, OR, (3.9), Metro Transit in Minneapolis (4.0), and UTA in Salt Lake City (3.9) stated that improved accuracy would be helpful in feeling more comfortable about using transit more, but they are more mixed as to whether they were already receiving inaccurate predictions for their systems.

More than half of users reported that making it easier to buy and use transit tickets would lead them to ride more (average rating 3.8). Miami-Dade Transit riders expressed the most interest in easier fare purchases, with a rating of 4.2. For the 10 agencies in the top 50 that already have ticketing available within *Transit* directly, those users were less likely to say that additional fare purchase options would get them to ride more, with a lower average rating of 3.7.

Rider desire for improved accuracy of real-time info

Riders who want real-time info improvements the most and the least, April 2021



Agency satisfaction
Schedules and route changes

Planned schedules and route changes to increase ridership

As agencies are planning for the return of riders, they know that ridership patterns have changed and they want to understand fully the way riders will return by modifying services to best meet returning riders' needs. Many agencies are already undertaking or planning for these changes, like SEPTA in Philadelphia, where *Transit* is helping our partner Nelson\ Nygaard as part of the bus network redesign process. In this survey, respondents were asked to report how strongly they felt about planned schedule and route changes, and the impact that would have on their desire to ride transit more frequently.

Questions:

I would ride more often if my agency...

- → *Made bus and train departures more frequent*
- → *Sped up service, allowing me to get to my destination faster*
- → *Created routes that were more convenient for my travel needs*

U.S. riders stated they would ride more often if their agencies made bus and train departures more frequent (86%), if they sped up service (77%), and if they created routes that were more convenient to rider's travel needs (75%). None of these responses are surprising; with infinite resources, all transit agencies would love to have all buses and trains arrive every minute in every direction people desired them to go. In the absence of an unlimited piggy bank, however, one way that agencies have responded is to refocus their attention and resources on core services. Agencies have been monitoring crowded routes and supplementing them with more vehicles where possible, evaluating microtransit as a replacement for underutilized fixed-route service, and working to ensure that they can "build back better" when making plans for the next few years of bus and train service.

COVID-19 RESPONSE

As the transit industry prepares for recovery from the pandemic, understanding how riders perceive measures taken by agencies will be instrumental in learning from peers. These measures, such as mask mandates, have remained relatively unchanged since winter, with a few notable exceptions. Compared with November, riders report greater satisfaction in how well agencies are doing given their budget constraints.

Survey respondents were asked to rate their local agency on a five-point scale, with the following prompts:

1. Agency COVID-19 safety

"I am satisfied with my local agency's safety measures during COVID-19."

→ *Average rating: 3.8 (agree)*

63% of U.S. respondents reported that they are satisfied with agency safety measures during the pandemic. This has not changed significantly from November, where 65% reported they were satisfied. Generally, smaller agencies have performed better on this measure both in November and in April. Dayton, OH rated 4.3 on this measure, while MTA New York City Transit (3.3) and SEPTA (3.2) scored lowest. This measure also had a large variance, so differences between agencies, even within the same metropolitan areas, can be stark. For example, Big Blue Bus in Santa Monica, CA rated 3.89 while LA Metro rail riders rated this measure at 3.39.

2. COVID-19 service

"During the COVID-19 pandemic, I can still get where I need to go on public transit (even if I'm not riding)."

→ *Average rating: 4.0 (agree)*

70% of respondents reported they could continue to get where they needed to go using transit in April. This has not changed significantly from November results, when 68% reported they were satisfied. Respondents rated this measure at 4.0 in April, rating TriMet in Portland, OR, highest at 4.3 and DDOT in Detroit lowest at 3.4. This measure does not appear to be impacted by regional differences or agency size.

3. Use of resources

"My agency has done the best they can with the budget and resources available."

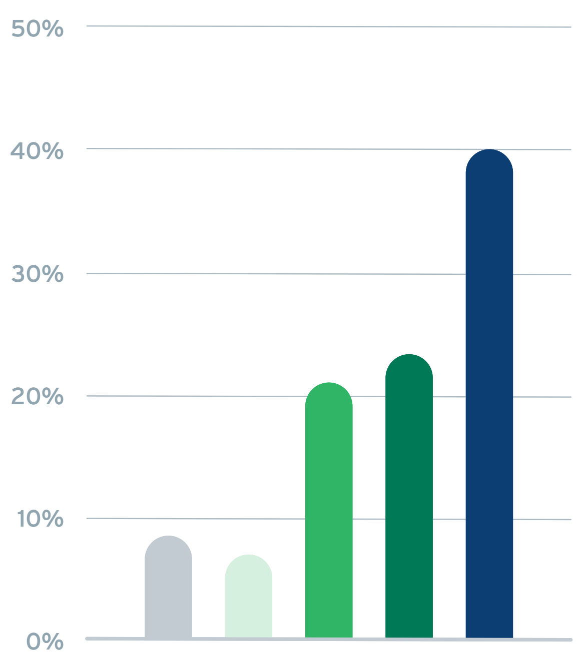
→ *Average rating: 3.8 (agree)*

63% of U.S. respondents reported that they are satisfied with agency budgeting and resource efficiency during the pandemic. This measure has improved from November, when only 56% of users were satisfied with how agencies were using their resources. Given the influx of additional funds from the federal government, this measure speaks to a broader level of support for transit and transit agencies.

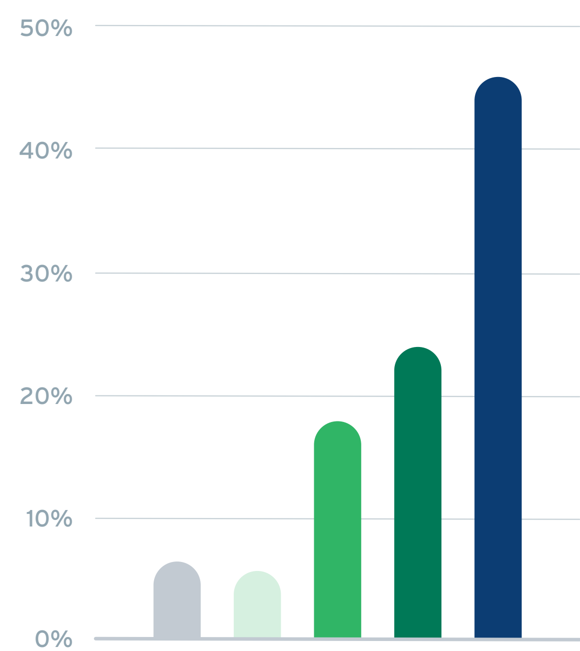
Rider satisfaction with local transit agency response to COVID-19

Rating Scale 1-5

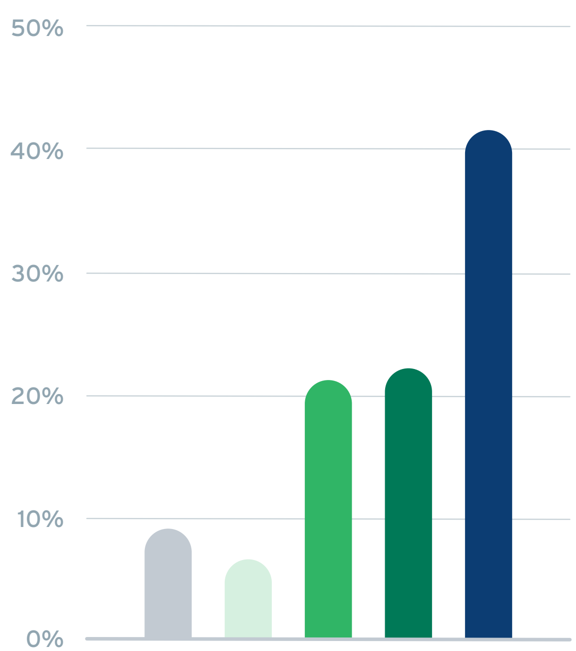
1 2 3 4 5



SAFETY DURING COVID-19



I CAN STILL GET WHERE I NEED TO GO



USE OF BUDGET / RESOURCES

Curious about your ridership demographics?

Reach out to partners@transitapp.com to learn about subscribing to regular rider experience reports.

RIDER DEMOGRAPHICS

VACCINATION PROGRESS FOR TRANSIT RIDERS

Does the extent to which transit riders are vaccinated throughout the U.S. influence overall satisfaction with transit service? Does a rising tide lift the outlook on all boats (or buses)?

Not quite, but the rates of vaccination provide some hope. Across respondents, 61% reported having received at least one vaccination, and 39% were fully vaccinated, surpassing general population vaccination rates at the time of the survey. There were no differences in vaccination rates between Spanish and English speaking respondents. The same regional trends that we see in overall vaccination rates also appear for *Transit* users: in Los Angeles, 67% of respondents reported at least one vaccination, while in San Antonio only 53% had received at least one shot. But, these variations do not have a measurable impact on how well riders report their agencies are performing on COVID-19 measures, like safety, service, or resource usage. LA Metro, for example, had middle of the pack ratings for all three satisfaction questions, while VIA Metropolitan Transit in San Antonio, TX, rated in the top five agencies on all three measures.

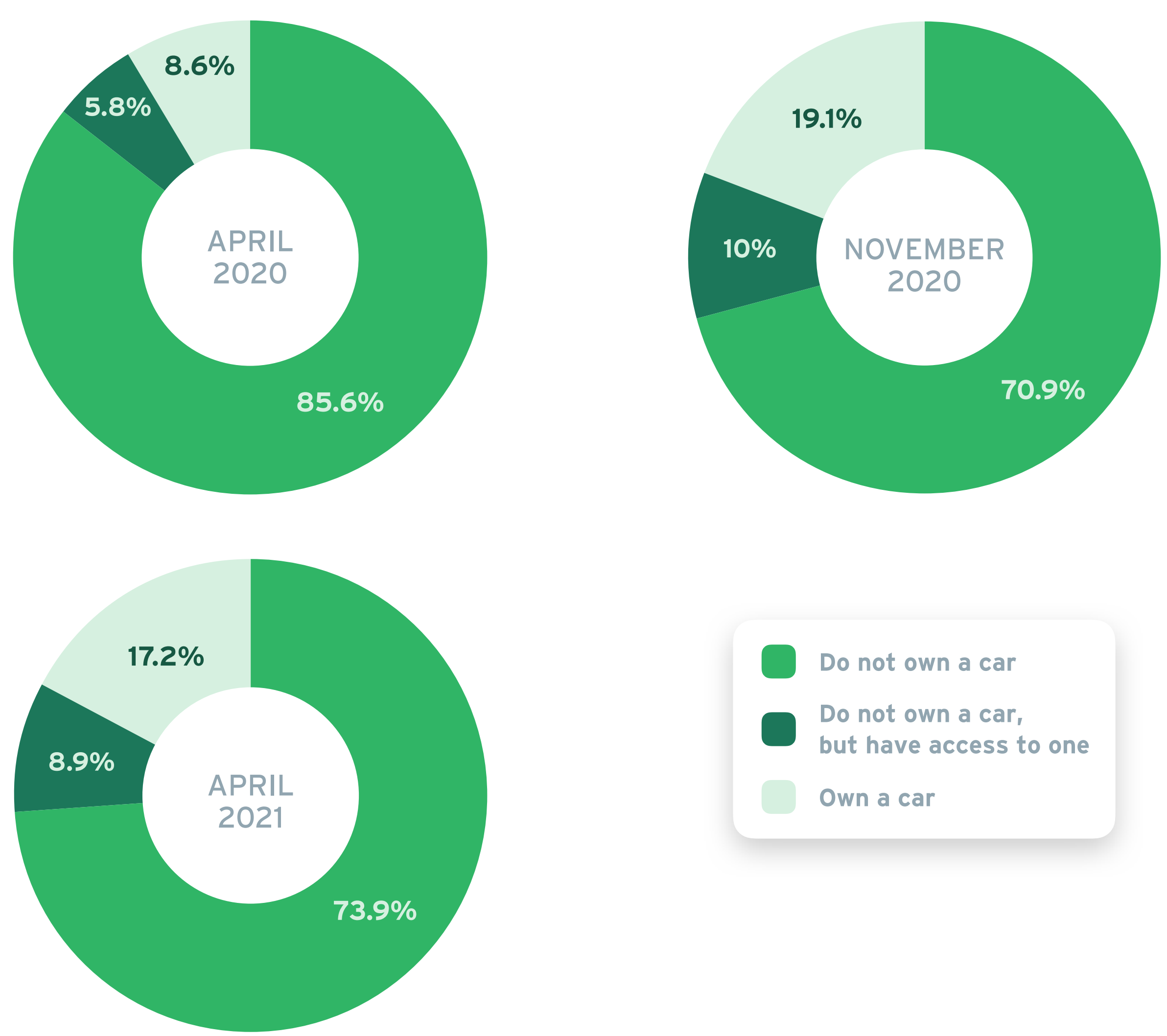
CAR OWNERSHIP

→ Right after the lockdowns in 2020, only the most essential workers were riding public transit. The percentage of car owners riding transit in November was more than twice the percentage at the beginning of the pandemic, and now a year after that first survey the pendulum has settled back towards what appears to be an equilibrium on car ownership: in April of this year, 74% of users did not own a vehicle or have access to one.

→ It's important to filter this result through the survey methodology: all survey respondents have *Transit* installed on their phones and the majority learned of the survey from an in-app banner, meaning they had to open the app first. One might expect the car ownership rate to be lower in the November 2020 and April 2021 samples, assuming that car owners would not open *Transit* at all, but this is not the case.

Car ownership

April 2020 vs. November 2020 vs. April 2021



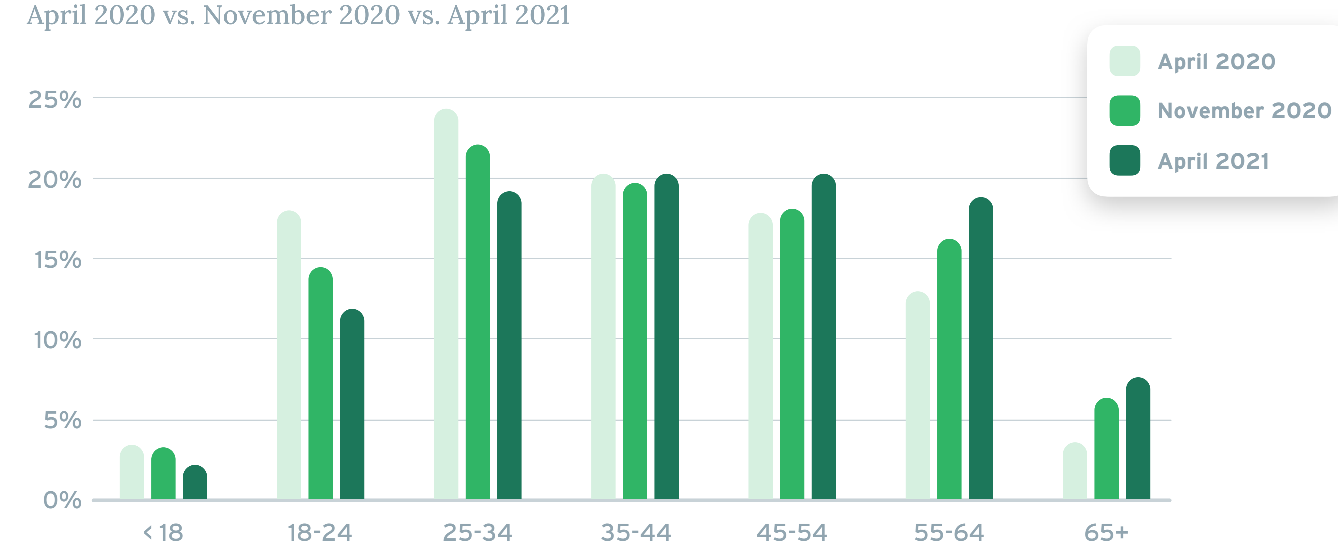
AGE

→ The percentage of college-age riders continues to decrease with each survey, following the closing and only partial reopening of campuses in the U.S.

→ Overall, the 18-34 age bracket is less present in the April 2021 sample than either the November or the April 2020 sample, suggesting that other age groups are returning to transit more quickly, therefore reducing the percentage of the respondents who are young adults.

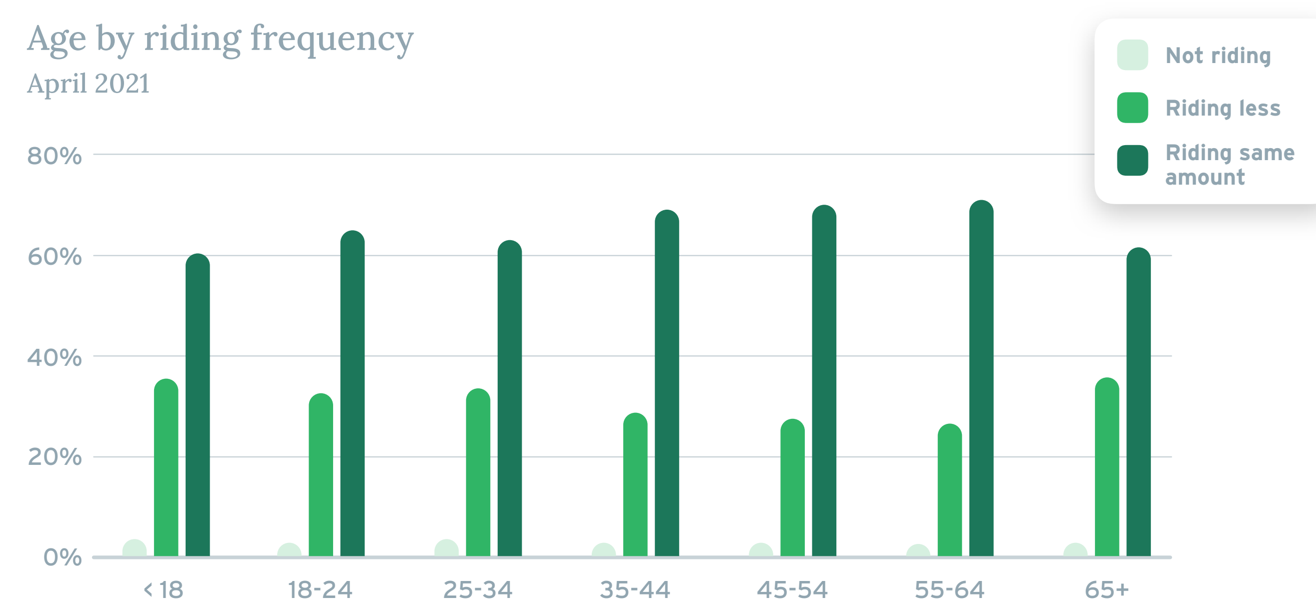
Age

April 2020 vs. November 2020 vs. April 2021



Age by riding frequency

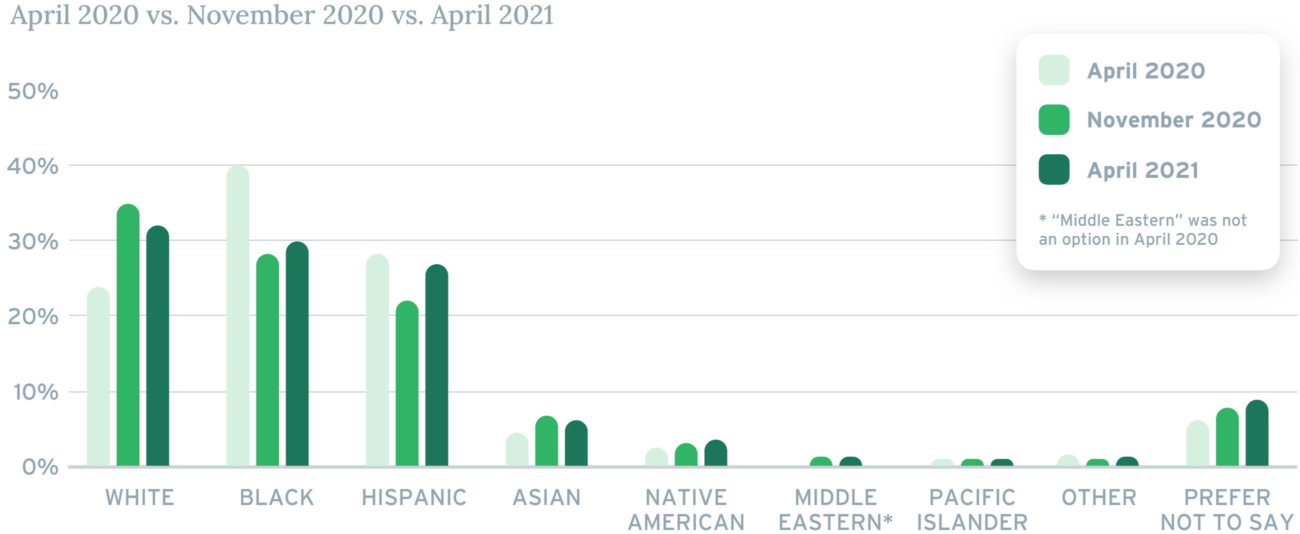
April 2021



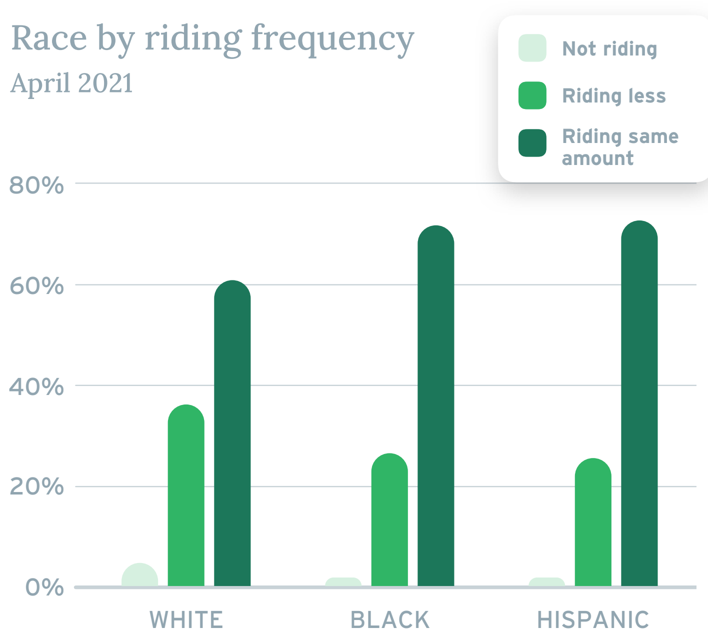
RACE AND ETHNICITY

- April 2020's extreme racial disparity seems to have lessened incrementally over time, although people of colour are still disproportionately represented compared to both the population at large and pre-pandemic ridership.
- Black and Hispanic respondents report that they are now riding the same (or more) as they were pre-pandemic (over 70% in April 2021, up 10-20% from November 2020). White respondents stayed around the same from November, with around 60% of respondents saying they ride the same or more as before the pandemic.

Race
April 2020 vs. November 2020 vs. April 2021

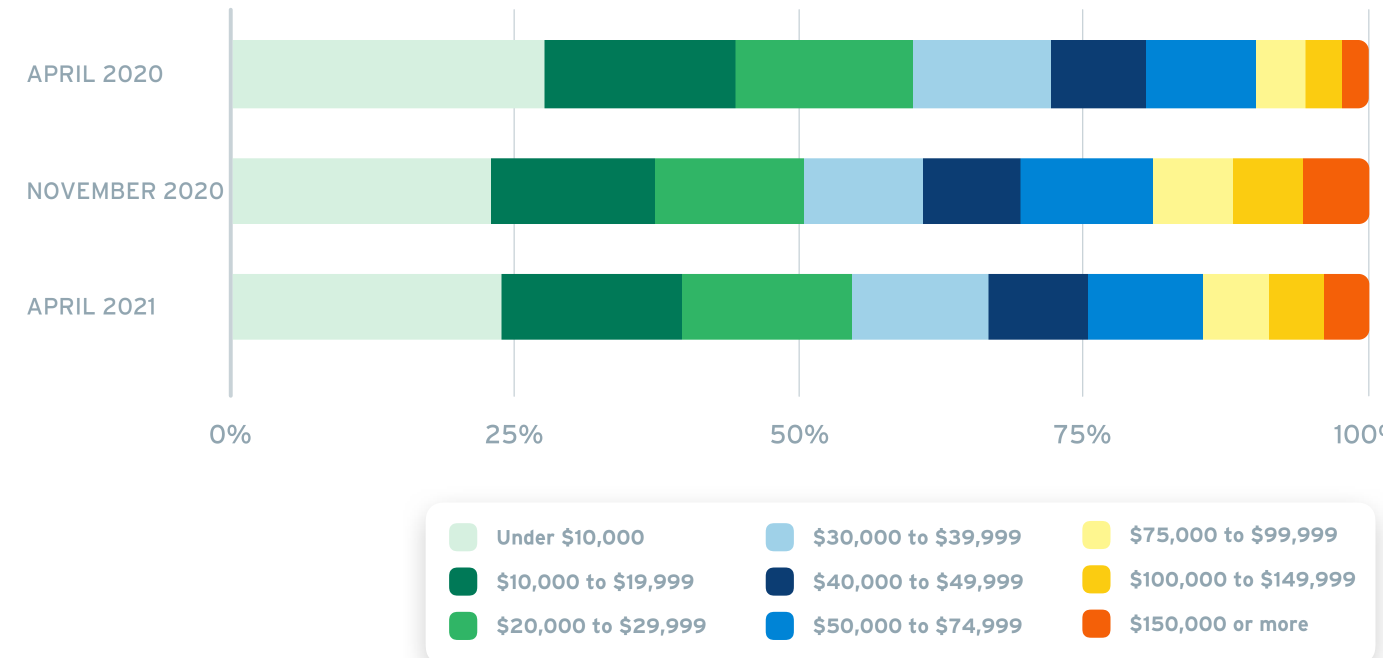


Race by riding frequency
April 2021



INCOME

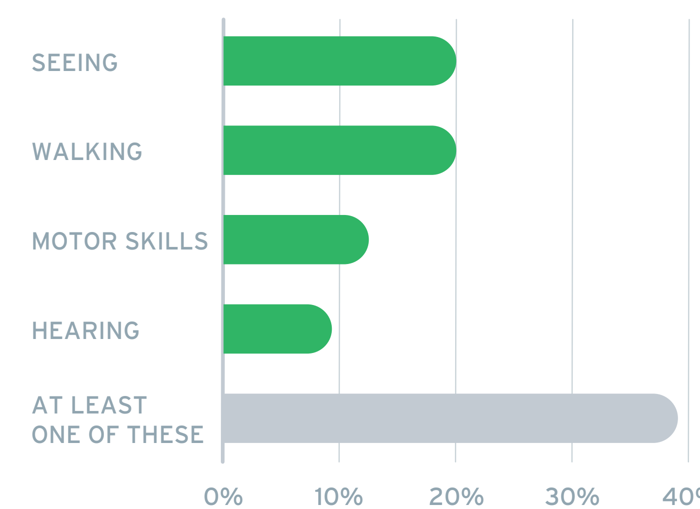
Income
April 2020 vs. November 2020 vs April 2021



ACCESSIBILITY

Our surveys ask respondents if they have any difficulty, even with aids, doing specific actions: seeing, hearing, using fine motor skills, and walking. Nearly 39% of respondents said they have difficulty in at least one of these categories, with 93% of all respondents answering this question. This has remained consistent between the November survey and this one, meaning that those with accessibility needs continue to be major stakeholders in agency policies beyond the general transit-riding population.

Do you have difficulty with...
April 2021

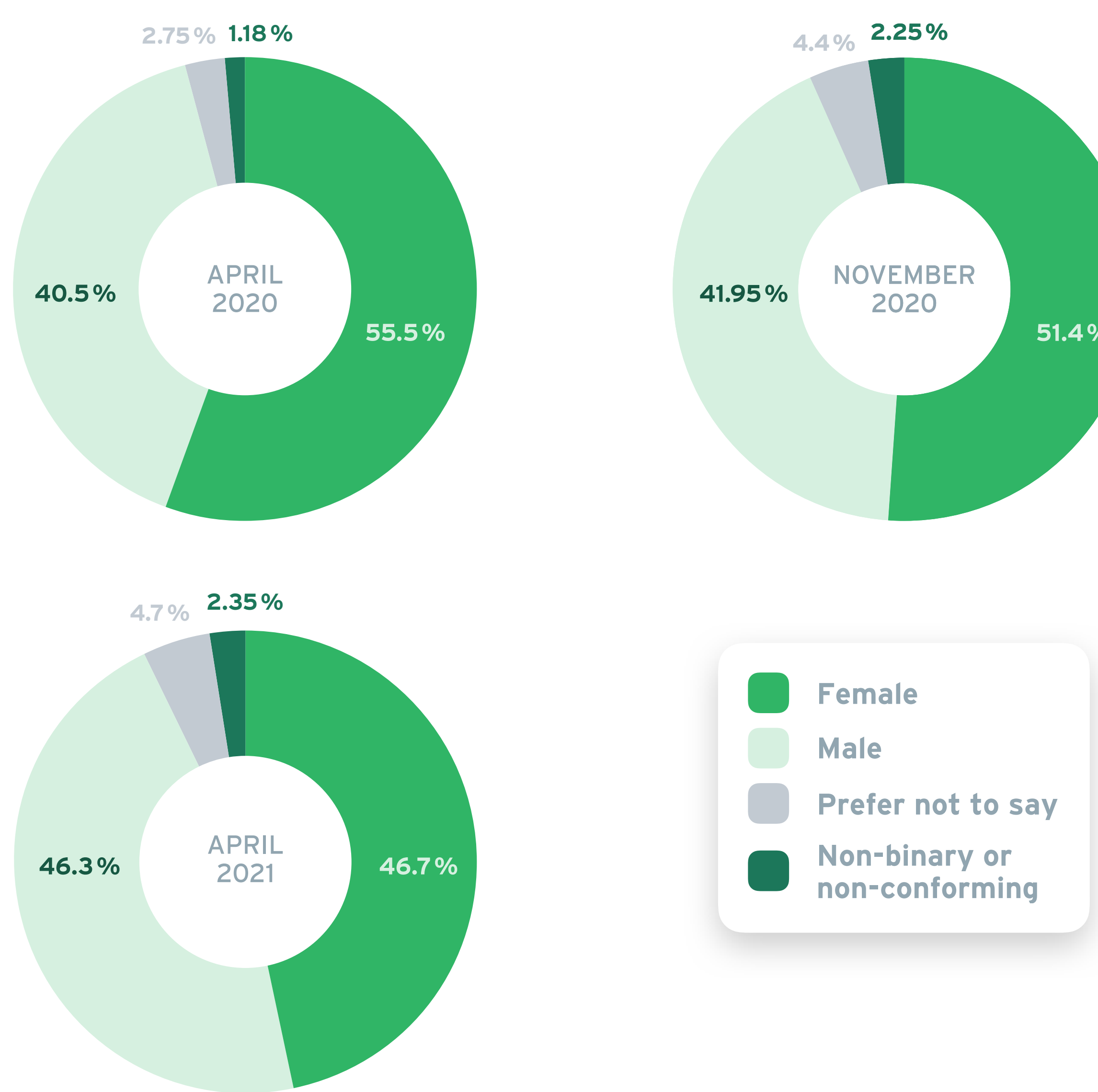


GENDER

- In April 2021, the gender balance returned to an even split between female and male riders (female:male = 1.00). There was a slightly smaller gender imbalance in November 2020 (female:male = 1.22) than at the beginning of the pandemic (female:male = 1.37). The return to pre-pandemic gender balance is complete, a year after the pandemic began.
- Among Spanish speakers, gender disparity is still stark in this survey (female:male = 1.38) but it was much more disparate in the November survey (female:male = 1.58) so the pattern of trending towards parity is apparent in the Spanish speaking population as well.

Gender

April 2020 vs. November 2020 vs April 2021



OCCUPATION

Top five occupations, April 2021

	APR 2020	NOV 2020	APR 2021
Food preparation and serving	17.0%	8.4%	9.4%
Retail (including grocery and pharmacy sales jobs)	9.0%	9.7%	8.1%
Building and grounds cleaning and maintenance occupations	6.3%	4.2%	6.2%
Healthcare support	10.2%	5.6%	5.5%
Healthcare practitioners and technical occupations	6.4%	5.6%	5.5%

In April 2020, the top five occupations were food preparation and serving, healthcare support, sales and related occupations, healthcare practitioners, and building and grounds cleaning and maintenance.
In November 2020, the top five occupations were retail, food preparation, healthcare support, healthcare practitioners and education roles. In April 2021, building and grounds workers are returning to the top list.

While essential workers are still the most represented groups among survey respondents, the proportion of healthcare workers has decreased incrementally, and the proportions of non-essential workers (people with occupations in computers and mathematics, law, or similar fields) have increased over the course of a year. This reflects an overall trend: all types of riders are returning to transit, and a new era of post-pandemic transit usage is beginning to take shape.

BACKGROUND

GOALS

The survey summarized in this report ran during a two-week period in April and May 2021, with the goal of providing a snapshot of agency satisfaction and ridership needs during the recovery period from the COVID-19 pandemic. *Transit* app ran similar surveys in April 2020 and November 2020, allowing for a comparison of relevant topics between surveys. Topics asked about in the survey include agency satisfaction measures, perception of safety on public transit, and plans to return to public transit use.

Questions in the survey, developed by *Transit* with input from a steering committee of transit agency representatives, fell into four main groups: agency ratings, current riding habits and needs, future riding habits and needs, and demographics, including work-from-home plans and industry of employment.

METHODOLOGY

DISSEMINATION

The survey consists of 31 ridership questions, 12 demographic questions, and one meta-survey question, asking whether the respondent is willing to answer the optional demographic questions. The survey launched on April 23, 2021, remained open for two weeks, and was disseminated to *Transit* users in North America in English, Spanish and French entirely digitally via:

- In-app banners on the home screen of the *Transit* app
- Push notifications to *Transit* app users (which they see as a notification on their mobile device)

DUPLICATION

The survey software prevents users from responding to the same survey twice, but this would not prevent individuals from responding from two devices. This kind of occurrence is quite rare in *Transit* surveys, but *Transit* does scan for duplicate responses by user ID, IP address, demographic information, and survey responses.

Repeat responses on surveys do occur, but typically at a low rate. In this survey, there were no suspected repeat responses.

EXCLUSION

Responses were included when the user responded to all of the survey questions, including the meta-survey question (whether the user is willing to answer demographic questions). Approximately 96% of responses met this criterion.

Responses were not excluded based on answers to demographic questions, since these were optional. Consequently, demographic data are not available for every respondent. Over 95% of respondents, after exclusion, answered the demographic questions.

ABOUT TRANSIT

Launched in 2012 in Montreal, *Transit* is North America's most popular public transit app, with millions of active users in more than 200 cities. *Transit* is the highest ranked public transit-focused app in the App Store in North America. The app has received Apple's coveted Editor's Choice tag in the App Store, and has an App Store rating of 4.7 stars.

Right on launch, *Transit* shows users all nearby transport options and departure times in big text and bright colours. Users can easily navigate public transit with accurate real-time predictions, simple multimodal trip planning, and step-by-step navigation. With public transportation at its core, *Transit* also integrates real-time information and payment functionalities for other sustainable mobility modes, including ridehail, bikeshare, scooters and carshare.

Transit's goal has always been to enable users to get from A to B without their own car, and our ease-of-use plays an important role in improving the public transit rider experience. Because of our ubiquity with public transit riders within markets across North America, *Transit* is able to reach a sometimes-difficult segment of the population to access, and based on the surveys we have run thus far, our responses are generally reflective of the age, race, income, and other demographics of public transit riders overall. *Transit*'s surveys provide quick temperature readings within a region, benchmarked comparisons across regions, and in-depth analysis linked to user behaviours in the app itself.

Get a custom report for your agency

Join our steering committee and can subscribe to quarterly rider experience reports by reaching out to partners@transitapp.com.

transit