Rider Happiness Benchmarking Report

Summer 2021

Prepared by



ABOUT THE RIDER HAPPINESS BENCHMARKING PROGRAM

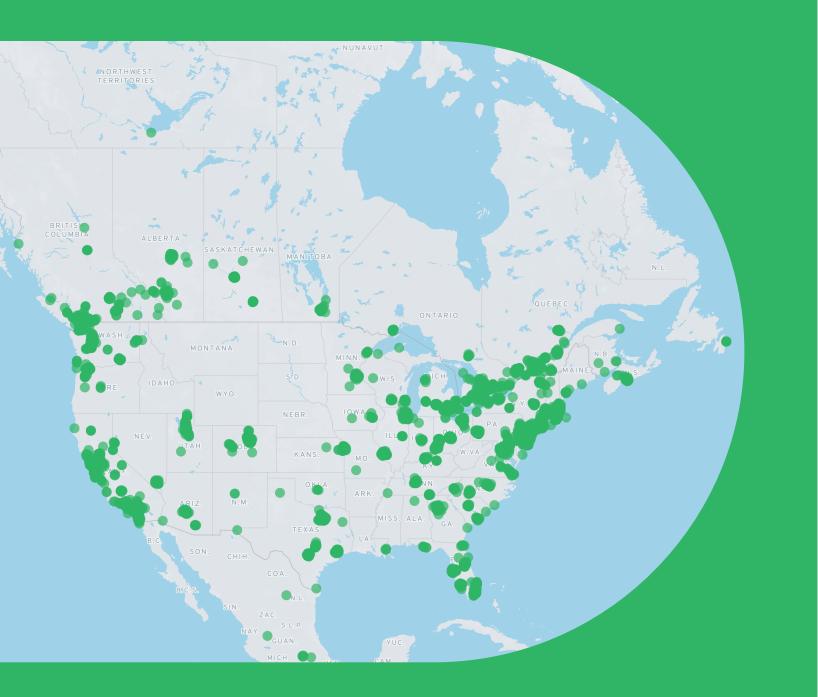
By distributing surveys in-app to our representative sample of riders spanning hundreds of agencies across North America, Transit's Rider Happiness Benchmarking (RHB) program offers an industry-leading set of metrics. Transit offers a subscription service for agencies to receive detailed, local quarterly 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 BC Transit (British Columbia), Pierce Transit (Tacoma, WA), GDRTA (Dayton, OH), STO (Gatineau, QC), and WMATA (Washington, DC) are already subscribers. While only subscribers 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 October 2021.

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28K+ **RESPONSES IN NORTH AMERICA**

18K+

FROM THE U.S.

FROM CANADA

9K+

EXECUTIVE SUMMARY

Transit riders are always checking their phones: for directions, to see when the next bus is coming, or to read an alert from their transit agency. At Transit, we don't just give updates to riders, we also get updates from them to help agencies gauge rider sentiment about service, safety, and more.

Four times a year, we ask riders to grade how their transit agency is doing and say what would improve their experience of riding public transit. It's all part of our Rider Happiness Benchmarking (RHB) program, launched with our steering committee of agency partners.

Our surveys are representative of transit riders at large and 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.

With this information, agencies can better understand what riders need, their future plans, and their perceptions of public transit. The results yield some surprising insights and highlight a few potential low-cost opportunities for agencies.

This summer, we surveyed more than 28,000 riders from transit agencies across the United States and Canada from July 27 to August 6. Here are the top takeaways of what we learned:

- **1.** Satisfaction with local transit agencies is up, but there's a lot of variation
- **2.** Public meetings, even virtually, are not reaching riders
- **3.** Pre-pandemic patterns are returning slowly but surely... but mostly slowly
- 4. Vaccination rates among riders are high, though mask compliance has dipped
- 5. Masks may be here to stay on public transit, even if mask mandates end
 - **6.** Riders have goodwill for agencies but react negatively to service changes
 - 7. More frequent buses and more reliable real-time info top riders' wishlists

Want to dive in? Let's get started.

1. Satisfaction with local transit agencies is up, but there's a lot of variation

Our survey utilizes the Net Promoter Score (NPS), a common scoring system in marketing research that uses a 10-point scale to ask riders if they would recommend their transit agency to friends or family. NPS is calculated by taking the percentage of responses of 9 or 10 and subtracting the percentage of responses at 6 or below.

- → Overall NPS for North American transit agencies increased from -12 in November 2020 to -2 in April 2021, and +1 in July 2021.
- → The highest-rated agencies are Big Blue Bus (Santa Monica, CA), Ride On (Montgomery County, MD), Miami-Dade Transit, UTA (Salt Lake City, UT), and TriMet (Portland, OR), all with NPS scores greater than 30.
- → The lowest-rated agencies are ETS (Edmonton, AB), DDOT (Detroit, MI), MDOT MTA (Baltimore, MD), TARC (Louisville, KY), and the MTA (New York, NY), all with scores lower than -30.

2. Public meetings, even virtually, are not reaching riders

Our sample of riders receive information from and communicate with their transit agency primarily through their smartphone. Messages onboard vehicles and at transit stops also remain important, while social media has limited traction. Although online public meetings have reached more people than in-person public meetings in the past six months, both have very low rates of participation and are likely not the best venues to connect with a broad range of riders about major projects.

How do you recall receiving information from or communicating with your transit agency during the past 6 months?

- → 85% via mobile apps
- → 37% via signs or posters onboard vehicles or at transit stops
- \rightarrow 20% via the agency website
- → 13% via local media
- → 10% via email
- → 7% via Facebook, 7% via Twitter, and 3% via Instagram
- → 1.5% via online public meetings and 1.1% via in-person public meetings

3. Pre-pandemic patterns are returning slowly but surely... but mostly slowly

Public transit riders are relying less on other
modes of transport (such as ridehail, driving, or
bicycling) than they did earlier in the pandemic.Transit riders across North America continue
to report high vaccination rates. At the same
time, riders report seeing more people without
masks onboard, particularly in Canada where
some transit agencies have relaxed their mask
requirements.Public transit riders are relying less on other
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to report high vaccination rates. At the same
time, riders report seeing more people without
masks onboard, particularly in Canada where
some transit agencies have relaxed their mask
requirements.

- → 68% of respondents say they are riding public transit as often as they did pre-pandemic (statistically unchanged from 67% in April 2021).
- → 65% rely on at least one other mode besides public transit more than before the pandemic (down from 73% in April 2021).
- → 40% are going to work or school in-person five or more days a week (compared to 39% in April 2021), while 23% work or attend school exclusively from home (down from 25% in April 2021).
 → 40% of U.S. respondents strongly agree that everyone on board their transit trips was wearing a mask, vs. 36% in Canada
- → 45% expect to be at the office or school five or more days a week in October (+5% compared to current behaviour), and 19% continue to expect to be completely remote in October (-4% from current behaviour).
 → Riders on MTA subways (New York, NY) and RTD (Denver, CO) report the lowest levels of mask compliance in the U.S., despite the continued mask mandate.
- → 10% expect they will return to pre-pandemic levels of public transit use in the next three months, 5% in more than three months, 11% when COVID-19 is no longer a threat, and 6% never expect to return to their pre-pandemic levels of transit usage.

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Want to see how your agency compares?

Reach out to <u>partners@transitapp.com</u> to subscribe to quarterly reports.

4. Vaccination rates among riders are high, though mask compliance has dipped

- → 72% of respondents say they are fully vaccinated (up from 27% in April 2021), while 15% have not received any doses of the vaccine (down from 50% in April 2021).
- → Just 38% strongly agreed that everyone was wearing a mask during their last trip (down from 47% in April 2021) and 27% disagreed or strongly disagreed that everyone was wearing a mask (up from 20% in April 2021).

5. Masks may be here to stay on public transit, even if mask mandates end

The norms around masking on public transit may have changed permanently as riders support mask mandates and mask-wearing more generally, even without mask mandates in place. Saskatoon Transit, for example, is one of the Canadian agencies that relaxed its mask mandate over the summer, offering a glimpse into what might happen if other cities eventually follow suit. Although riders in Saskatoon report the lowest rate of mask-wearing in North America, support for masks among Saskatoon riders remains high. Generally, support for masks is higher in the U.S. than in Canada.

- → 78% of respondents in North America support a continuing mask mandate on public transit, with only 10% opposed.
- \rightarrow 72% would continue to wear a mask all the time without a mandate, and only 12% would not.
- → 67% of respondents in Saskatoon, which does not have a mask requirement onboard public transit, would still wear a mask voluntarily. 62% in Saskatoon support a mask mandate, with only 17% opposed.
- → If masks were no longer required on public transit, 76% of U.S. respondents would wear a mask onboard voluntarily, vs. 64% in Canada
- → 82% of U.S. respondents are in favour of a mask mandate on public transit, vs. 71% in Canada

6. Riders have goodwill for agencies but react negatively to service changes

Overall, riders have positive reactions to how their local transit agency has handled the pandemic. However, riders have harshly judged agencies that made the biggest changes to service. For example: SFMTA/Muni (San Francisco, CA) implemented a series of major changes in response to COVID-19, while VTA (San Jose, CA) suffered from a mass shooting and operator shortages that have suspended its light rail service, and ETS (Edmonton, AB) implemented a major system redesign. All three agencies ranked near the bottom when we asked riders to say whether they can continue to get where they need to go on public transit during the pandemic. There's significant variation between agencies on these scores, showing that communications from transit systems themselves play a strong role in influencing perception.

- \rightarrow Of respondents who are riding less during the pandemic, 41% said it was due to reductions in service or route modifications made in response to COVID-19.
- \rightarrow 45% of respondents feel well-informed by their transit agency about route disruptions and service changes (down 2% from April 2021).
- \rightarrow 64% have a positive impression of their agency's COVID-19 safety measures (up 2% from April 2021).
- \rightarrow 64% also believe their agency has done the best it could to deal with COVID-19 given the budget and resources available (up 3% from April 2021).

7. More frequent buses and more reliable real-time info top riders' wishlists

More frequent service and more reliable real-time information are the top two requests from riders when asked what could get them to use public transit more. Compared to other agencies, Miami-Dade Transit riders were the most supportive of faster and more convenient service, while Montreal-area riders of the RTL (Longueuil, QC) and the STL (Laval, QC) were the most supportive of making it easier to purchase tickets and passes.

- \rightarrow 85% would ride more if service was more frequent or convenient.
- \rightarrow 80% would ride more if real-time info were more accurate.
- \rightarrow 71% would ride more with better stop conditions.
- \rightarrow 68% would ride more with improved safety and cleanliness.
- \rightarrow 66% would ride more with fare capping in place.
- → 65% would ride more if masks were more readily available on the vehicle.
- \rightarrow 60% would ride more if tickets and passes were easier to purchase.

	As agencies continue to contemplate major
5	adjustments to bus service, riders are most
	supportive of increased frequency. However,
	changes to bus stops are more controver-
	sial. 42% support consolidation of bus stops
t	to speed up routes, with 34% in opposition.

- Meanwhile, 51% support the addition of more bus stops, with 22% in opposition.
 - → 87% want a high frequency bus network.
 - → 82% want improved service coverage.
 - \rightarrow 79% want more direct routes.
 - \rightarrow 77% want more local routes.
 - \rightarrow 76% are in support of more bus lanes.

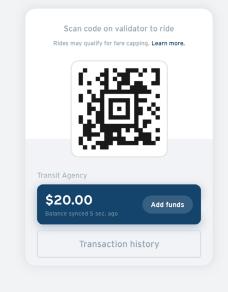
Curious about your ridership?

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

HOW TRANSIT HELPS IMPROVE RIDER HAPPINESS

MOBILE TICKETING

Making it easier to purchase fares doesn't just attract new riders, it also makes life easier for your existing riders. With equity-enhancing features such as fare capping, cash digitization, and support for smart cards, your riders will be happy to never again worry about updating their monthly passes at the transit centre or finding exact change. Our partnerships with vendors such as Bytemark, Masabi, and Token *Transit* mean we can integrate your existing fare payments provider.



SERVICE CHANGES PREVIEW MODE

Educating riders about upcoming service changes can be a challenge. With *Transit*, you can put a message right on the app's home screen to notify the public before the changes take effect. For major changes, you can employ our preview mode, which helps riders plan trips in advance and learn the new system before launch day. Systems that have deployed *Transit*'s preview mode recently include RTS (Rochester, NY), ETS (Edmonton, AB), GCRTA (Cleveland, OH), and RideKC (Kansas City, MO).



PROMOTE VACCINATION

Agencies are making heroic efforts to ensure their riders can easily get vaccinated. Partnering with local public health authorities and transit agencies, we've added vaccination clinics to our map in cities including Los Angeles, Baltimore, Toronto, Montreal, and Calgary. If you're interested in adding vaccination clinics to the app in your city, <u>check our guide</u>.

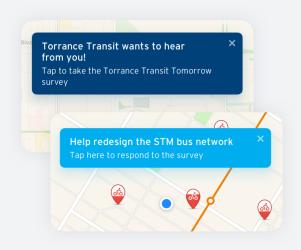
OUTREACH TO RIDERS ABOUT MAJOR PROJECTS

Reaching riders where they're at is key to gauging public sentiment for projects your agency is planning. We serve a broad range of users, including those who ride the system but are unlikely to take an in-person intercept survey or attend a public meeting. With in-app banners and targeted push notifications based on a variety of factors including geography, language, and more, we help make sure your public outreach efforts are getting the biggest bang for their buck.

REAL-TIME DOWN CHECKER

Accurate real-time data is one of riders' top concerns. So <u>we notify agencies automatically</u> if our systems detect problems in their real-time feeds.

Vaccination COVID-19 * 6 minutes Rite Aid Pharmacy #5439 4633 Santa Monica Blvd. Make appointment Get directions	N Normandie Ave	Fountain Av	
Rite Aid Pharmacy #5439 4633 Santa Monica Blvd. Make appointment	All	Vaccination	
	Rite	Aid Pharmacy #5439	
Get directions		Make appointment	
	-		





Interested in any of these happiness boosters?

Drop us a line anytime: partners@transitapp.com

SURVEY RESULTS: U.S. & CANADA

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Looking for stats about your riders?

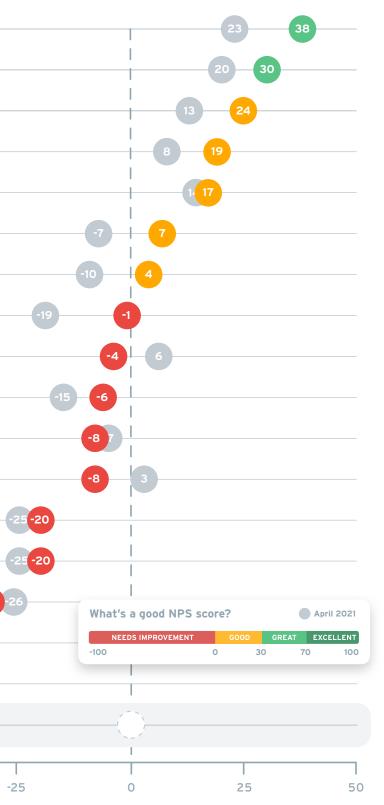
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NET PROMOTER SCORE

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

MIAMI DADE TRANSIT (MIAMI) METRO (ST. LOUIS) **PSTA (ST. PETERSBURG)** STM (MONTREAL) METRO (LOS ANGELES) **TRANSLINK (VANCOUVER)** MBTA (BOSTON) PORT AUTHORITY (PITTSBURGH) MUNI (SAN FRANCISCO) TTC (TORONTO) **RTC (LAS VEGAS)** HALIFAX TRANSIT (HALIFAX) SEPTA (PHILADELPHIA) WINNIPEG TRANSIT (WINNIPEG) MTA (NEW YORK) -31 MDOT MTA (BALTIMORE) ETS (EDMONTON) SEE YOUR AGENCY'S SCORE -50

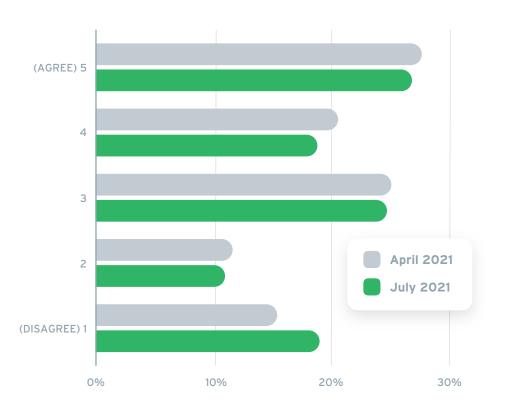




AGENCY SATISFACTION RATINGS

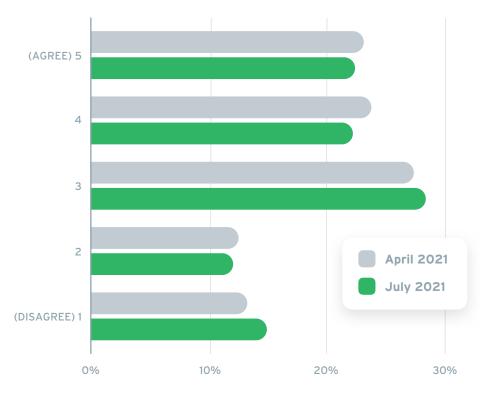
Agency Satisfaction: Alerts

- **Do riders agree**?
 - "I feel well informed by my agency about route disruptions and changes."

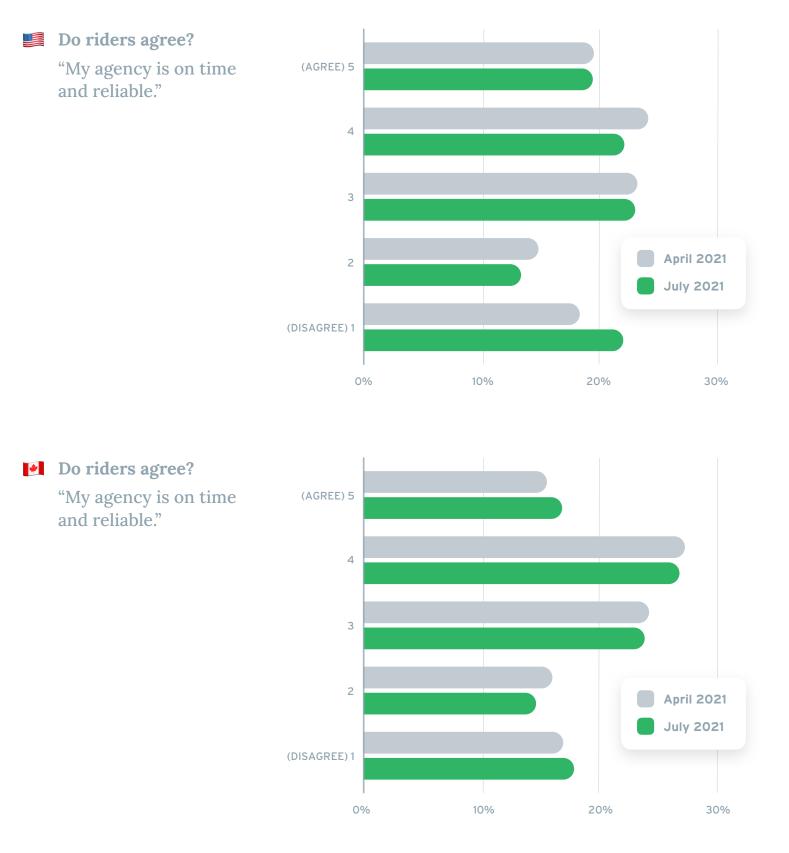


Do riders agree?

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

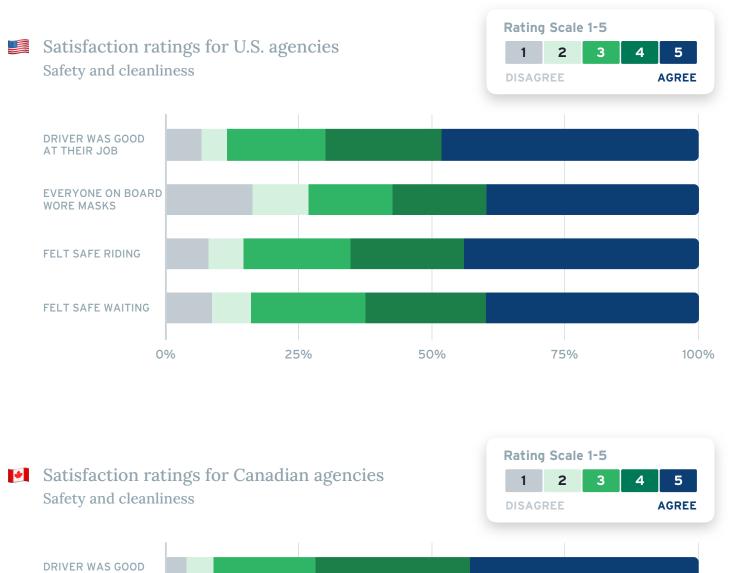


Agency satisfaction: Reliability

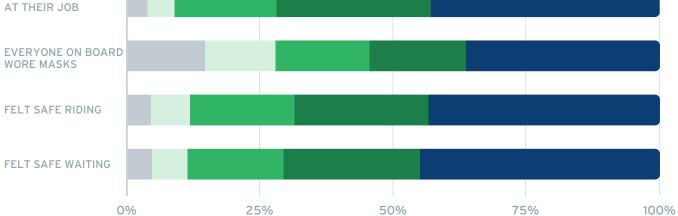


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Agency satisfaction : Safety and cleanliness



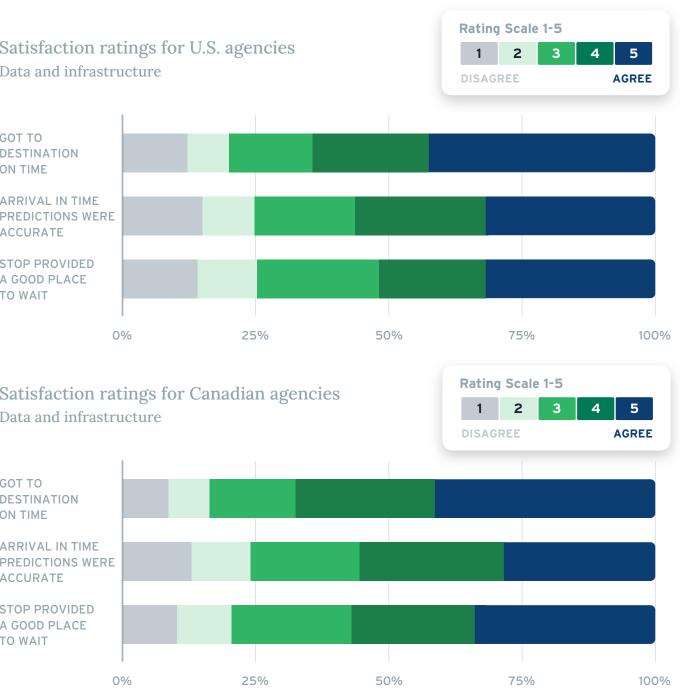




Agency satisfaction: Data and infrastructure quality

Data and infrastructure



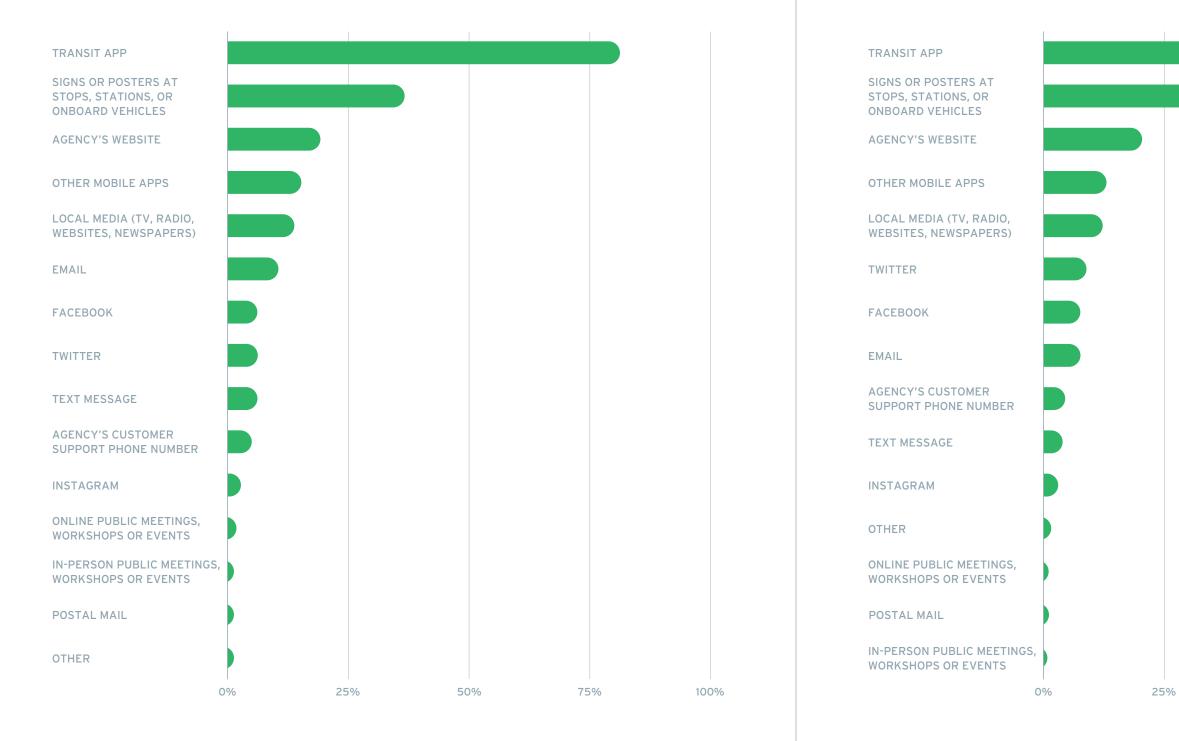


b How's your agency doing?

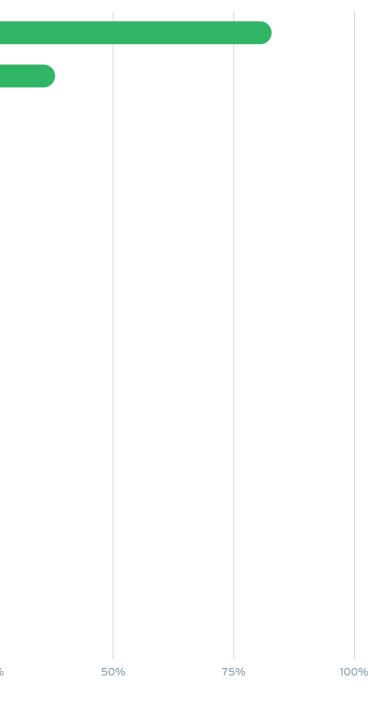
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COMMUNICATION CHANNELS

How do you recall receiving information from or communicating with your transit agency during the past 6 months?



How do you recall receiving information from or communicating with your transit agency during the past 6 months?



COVID-19

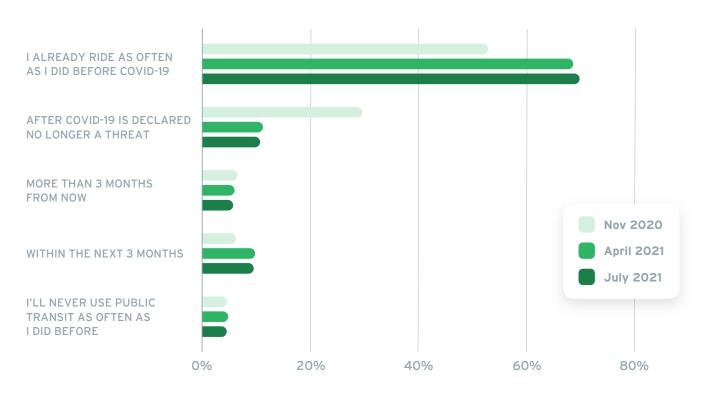
Perceived risk of riding public transit



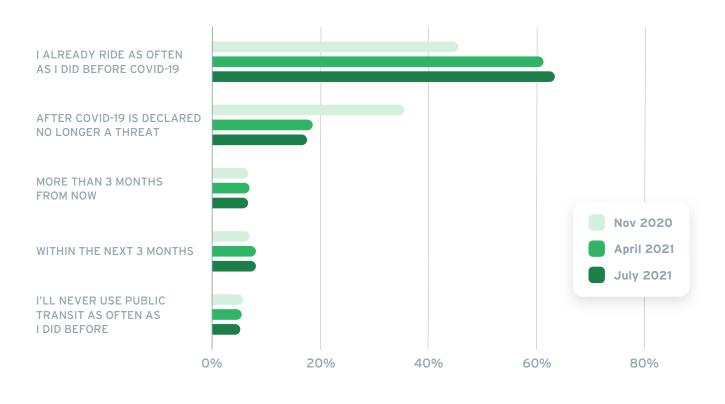
Percentage of riders who consider transit less risky than...

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

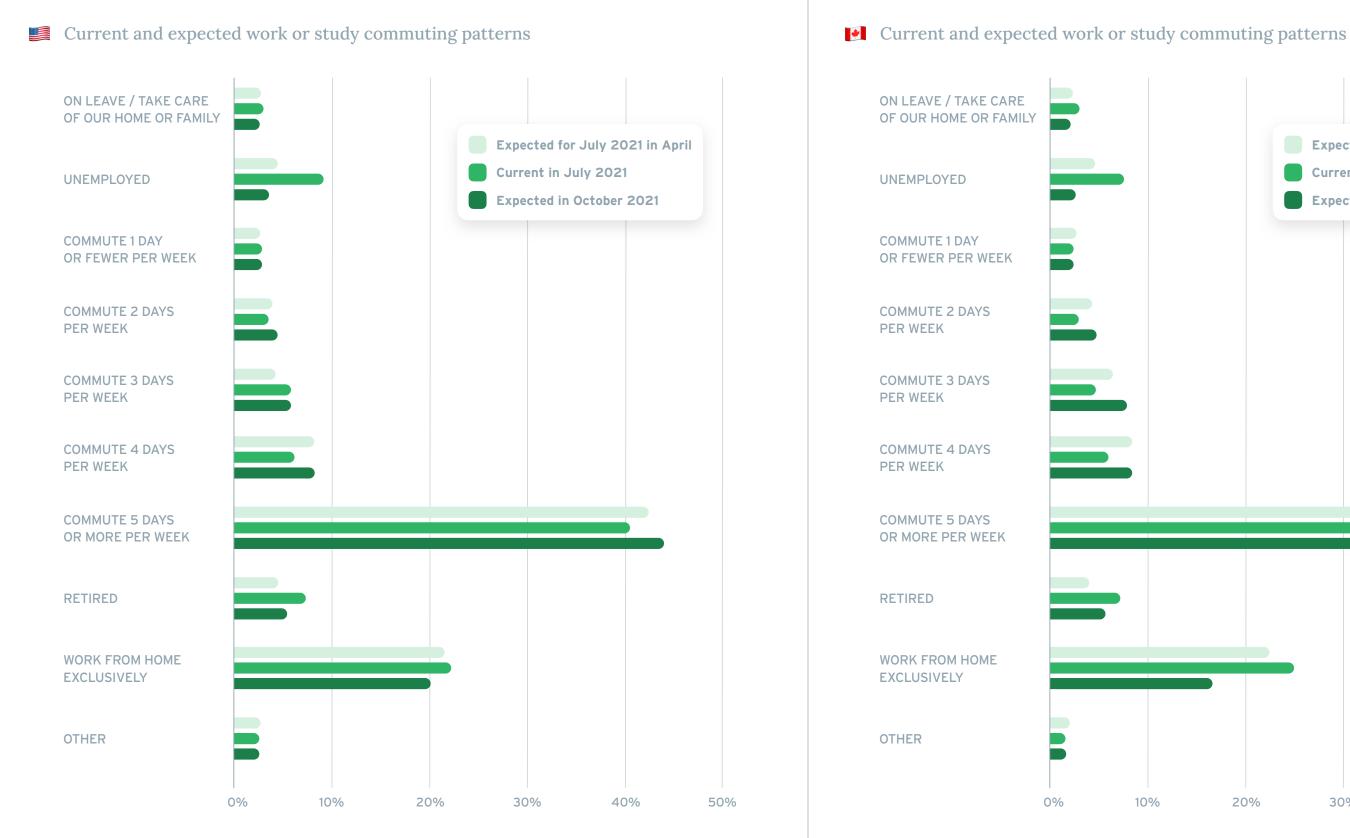


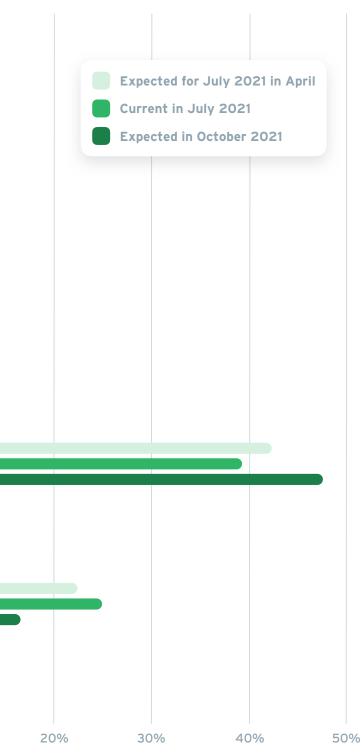


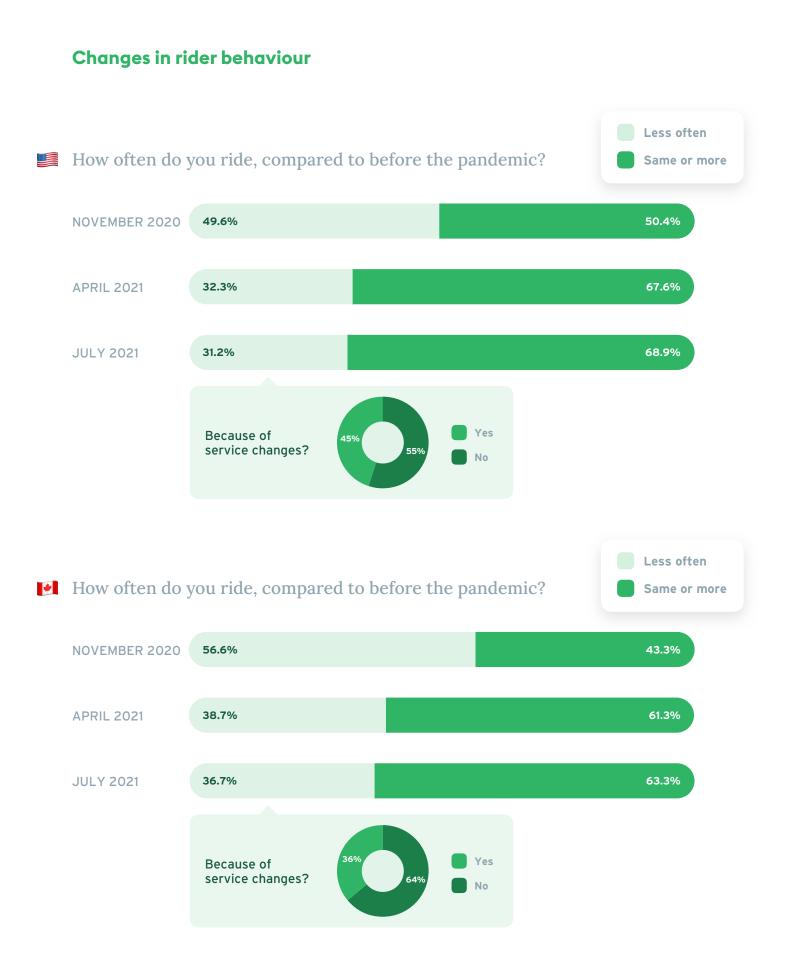
When riders will resume using public transit



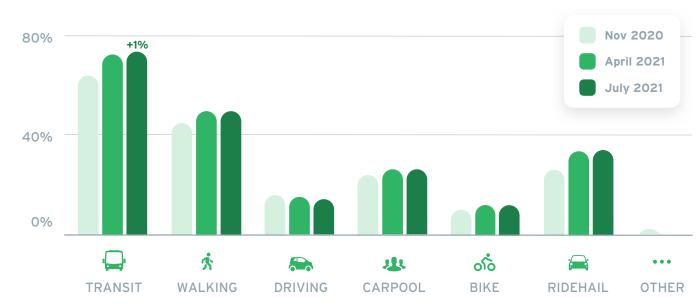
When riders will resume using public transit

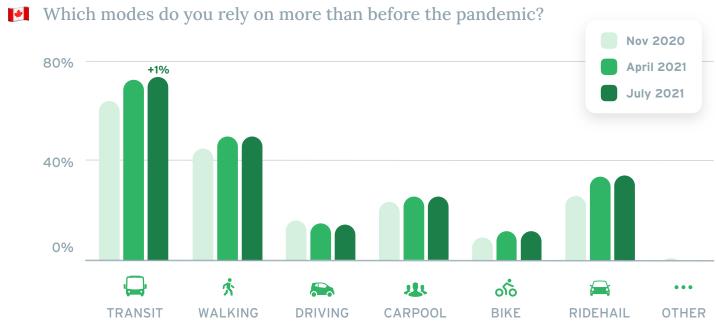




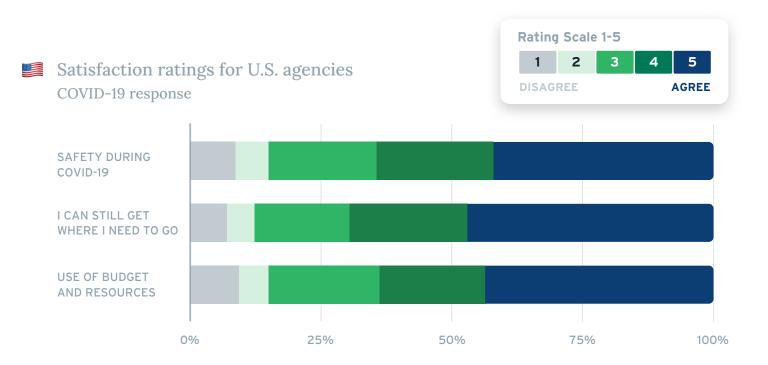




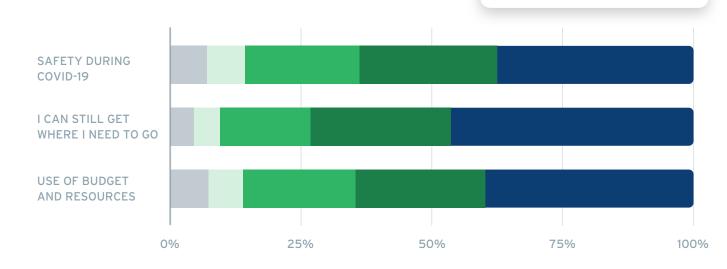




What riders think of their agency's COVID-19 response



Satisfaction ratings for Canadian agencies COVID-19 response



Mask requirements

	a. Would you voluntarily wear a mask on transit even if it were	100%	
	not required? b. Should masks be required on transit for the next few months?	80%	
	transit for the next few months:	60%	
		40%	
		20%	
		0%	
*	a. Would you voluntarily wear a mask on transit even if it were not required?	100%	
	b. Should masks be required on transit for the next few months?	80%	
		60%	
		40%	
		20%	
		0%	

5

AGREE

4

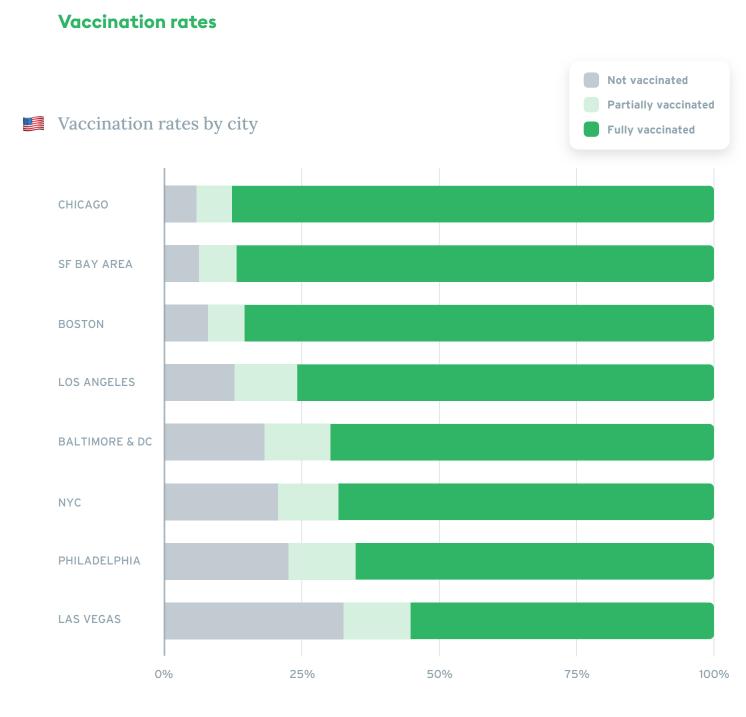
Rating Scale 1-5

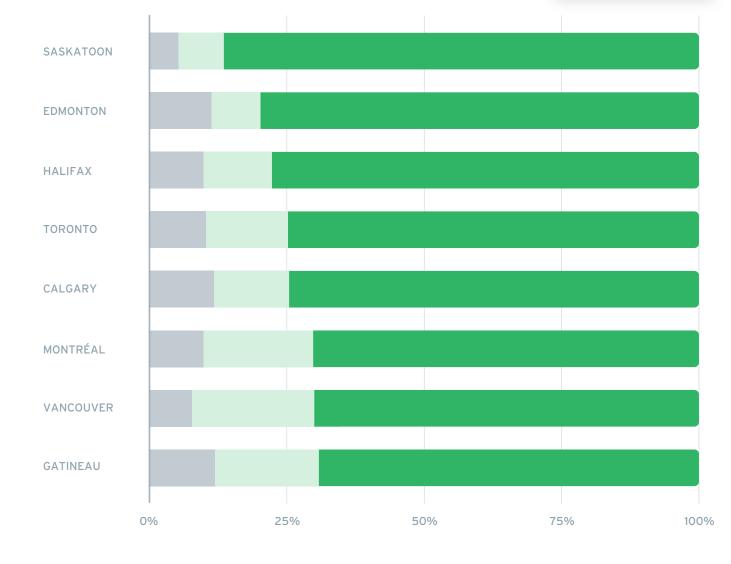
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DISAGREE



26





Vaccination rates by city



RECOMMENDATIONS

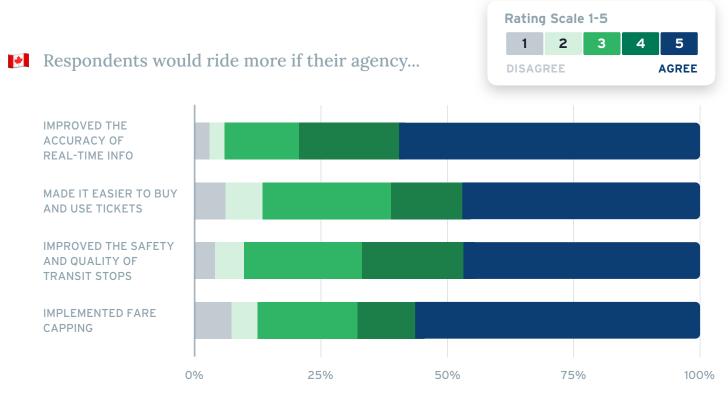


• How's your agency doing?

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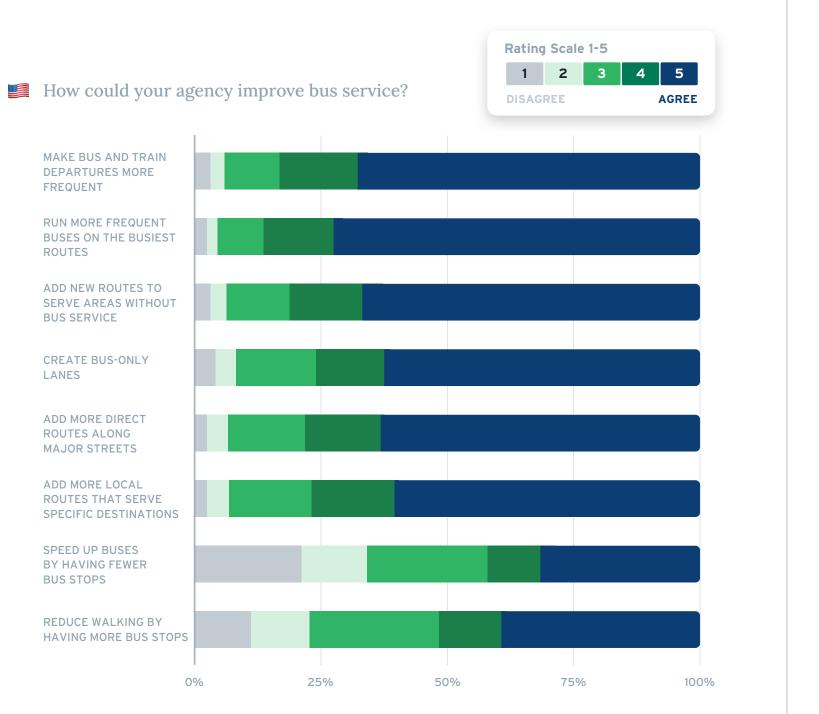
Respondents would ride more if their agency... IMPROVED THE ACCURACY OF **REAL-TIME INFO** MADE IT EASIER TO BUY AND USE TICKETS IMPROVED THE SAFETY AND QUALITY OF TRANSIT STOPS IMPLEMENTED FARE CAPPING 0% 25%

Infrastructure

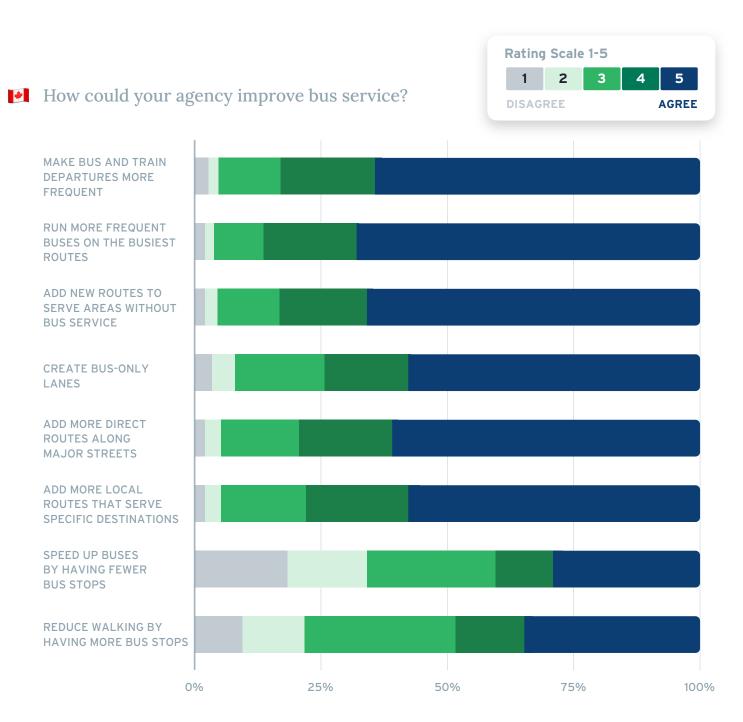




Service

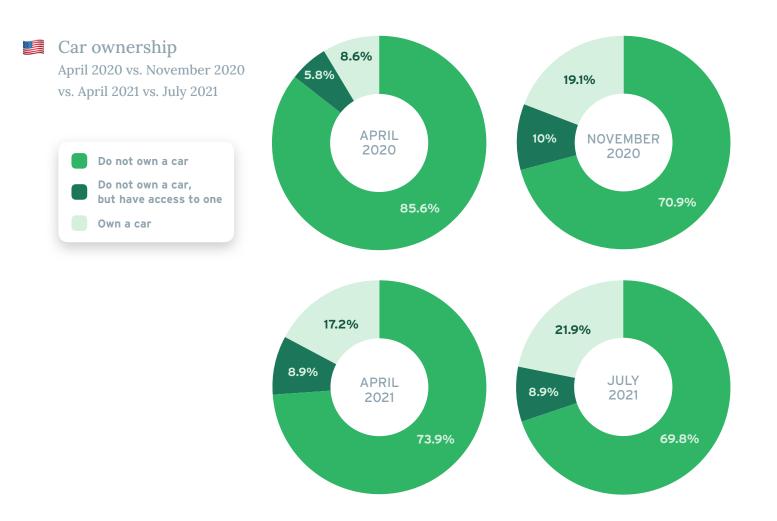


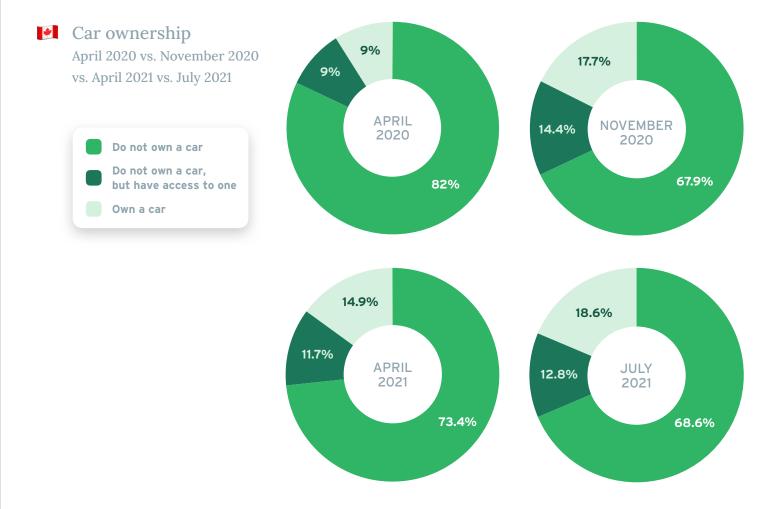
MAKE BUS AND TRAIN DEPARTURES MORE FREQUENT RUN MORE FREQUENT **BUSES ON THE BUSIEST** ROUTES ADD NEW ROUTES TO SERVE AREAS WITHOUT **BUS SERVICE** CREATE BUS-ONLY LANES ADD MORE DIRECT ROUTES ALONG MAJOR STREETS ADD MORE LOCAL ROUTES THAT SERVE SPECIFIC DESTINATIONS SPEED UP BUSES **BY HAVING FEWER BUS STOPS REDUCE WALKING BY** HAVING MORE BUS STOPS 0% 25%





CAR OWNERSHIP



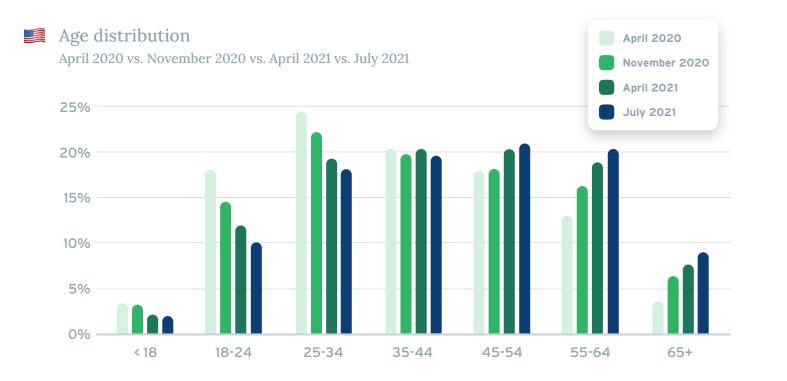


SUMMER 2021

Curious about your ridership demographics?

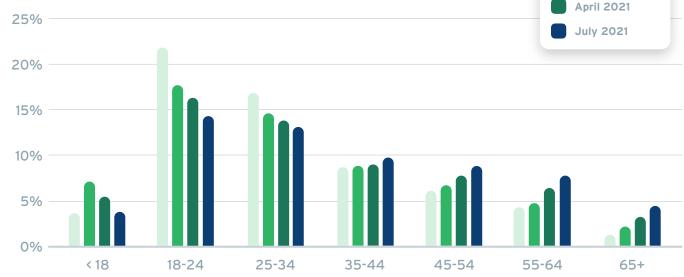


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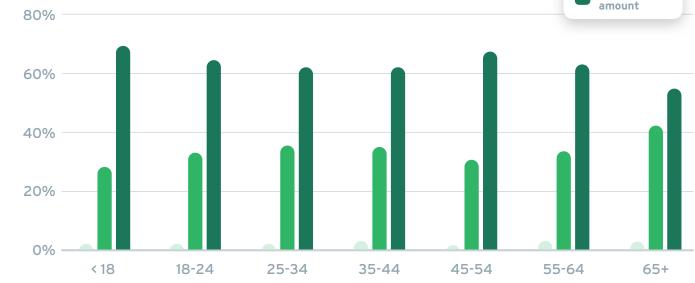


Age distribution

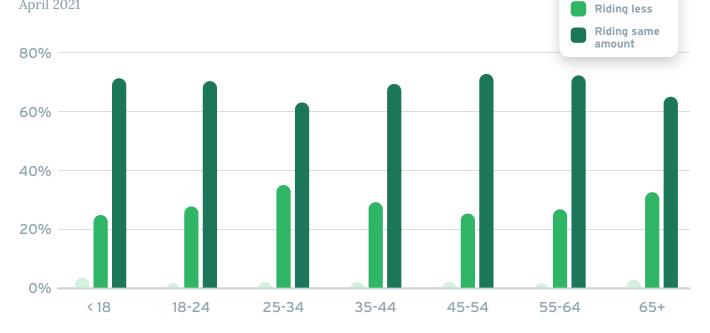
April 2020 vs. November 2020 vs. April 2021 vs. July 2021



Age by riding frequency April 2021



Age by riding frequency April 2021



SUMMER 2021

Not riding



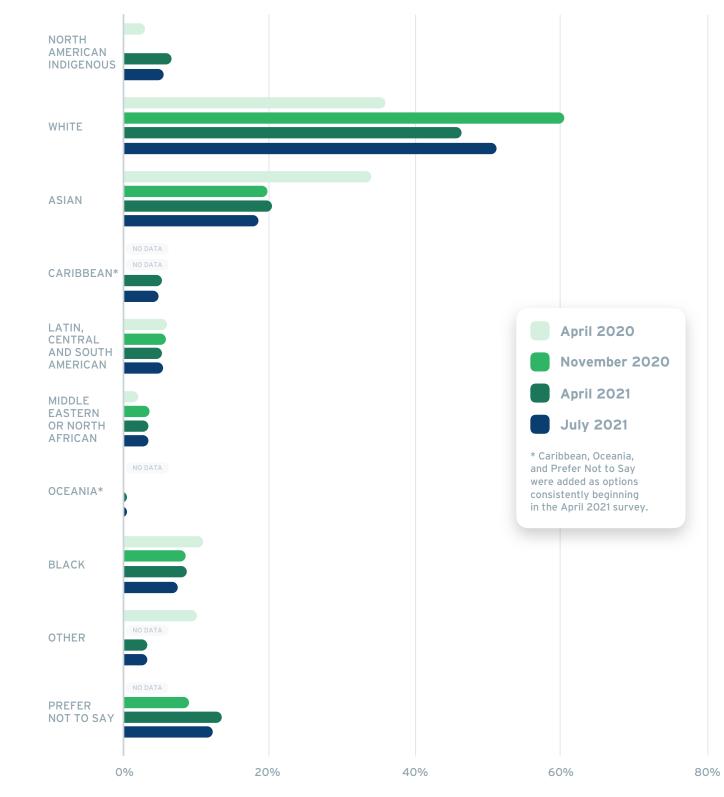


RACE AND ETHNICITY

Select all the categories that apply to you... July 2021



Select all the categories that apply to you... July 2021



HOUSEHOLD INCOME

Income

April 2020 vs. November 2020 vs. April 2021 vs. July 2021



Income

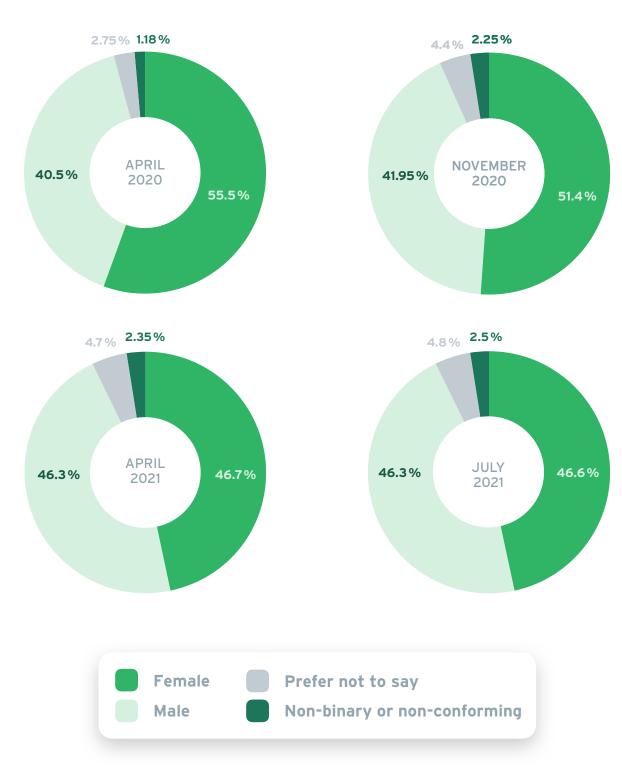
April 2020 vs. November 2020 vs. April 2021 vs. July 2021



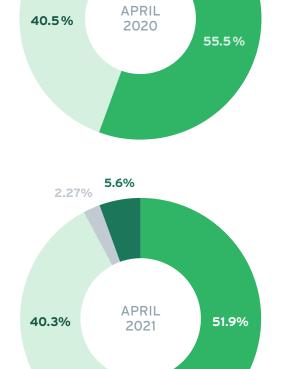
GENDER.

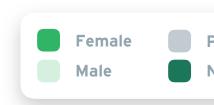
Gender

April 2020 vs. November 2020 vs. April 2021 vs. July 2021

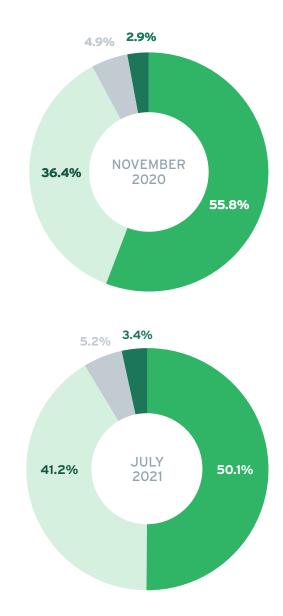












Prefer not to say Non-binary or non-conforming

OCCUPATION

Top five occupations, July 2021

	APR 2020	NOV 2020	APR 2021	JULY 2021
Food preparation and serving	17.0%	8.4%	9.7%	8.4%
Retail (including grocery and pharmacy sales jobs)	8.3%	9.7%	8.4%	7.7%
Building and grounds cleaning and maintenance occupations	6.3%	4.2%	6.4%	6.6%
Healthcare support	10.2%	5.6%	5.5%	5.9%
Education, training and library	3.1%	5.3%	4.9%	4.9 %

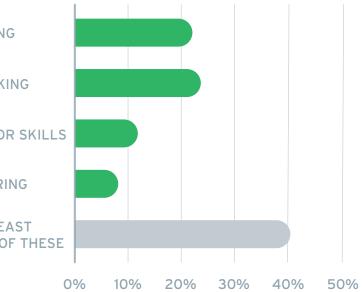
ACCESSIBILITY

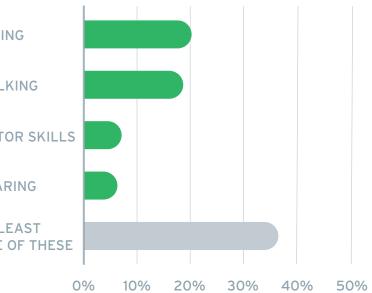
	Do you have differently with	
	Do you have difficulty with July 2021	SEEINO
		WALKI
		МОТОР
		HEARII
		AT LEA ONE OI
*	Do you have difficulty with July 2021	SEEINO
		WALKI

Top five occupations, July 2021

	APR 2020	NOV 2020	APR 2021	JULY 2021
Retail (including grocery and pharmacy sales jobs)	10.6%	13.7%	14%	12.9%
Food preparation and serving	17.6%	9.8%	11.9%	9%
Healthcare support occupations	6.4%	5.32%	6%	5.5%
Healthcare practitioners and technical occupations	5.2%	4.1%	5.5%	5%
Office and administrative support	3.4%	4.7%	3.9%	5%

*	Do you have difficulty with July 2021	SEEIN
		WALK
		МОТС
		HEAR
		AT LE ONE C





BACKGROUND

GOALS

The survey summarized in this report ran during a two-week period in July and August 2021, with the goal of providing a snapshot of agency satisfaction and ridership needs during the recovery period from the COVID-19 pandemic. Transit ran similar surveys in April and November 2020, as well as April 2021 and July 2021, 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 40 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 July 27, 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 Responses were included when the user responding to the same survey twice, but this responded to all of the survey questions, would not prevent individuals from responding including the meta-survey question (whether from two devices. This kind of occurrence is the user is willing to answer demographic quite rare in Transit surveys, but Transit does questions). Approximately 96% of responses scan for duplicate responses by user ID, IP met this criterion. address, demographic information, and survey Responses were not excluded based on answers responses. to demographic questions, since these were

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

Exclusion

optional. Consequently, demographic data are not available for every respondent. Over 92% of respondents, after exclusion, answered the demographic questions.

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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. The app is user-supported and ad-free thanks to the Royale subscription service, which is delivered in partnership with local transit agencies. Royale gives subscribers access to full schedules and maps for transit lines that are farther away, as well as extra features and customization options. More than 75 transit agencies have partnered to make Transit their official or endorsed app, and a growing number of agency partners will be gifting Royale to all their customers beginning in 2022.

Transit's goal has always been to enable users to get from A to B without their own car, and the app's ease-of-use plays an important role in improving the public transit rider experience. Because of Transit's ubiquity with public transit riders across North America, the app is able to reach a sometimes-difficult segment of the population to access, and based on the surveys thus far, 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 <u>partners@transitapp.com</u>.

