

Rider Experience Benchmarking Report

Winter 2020-2021

PREPARED BY

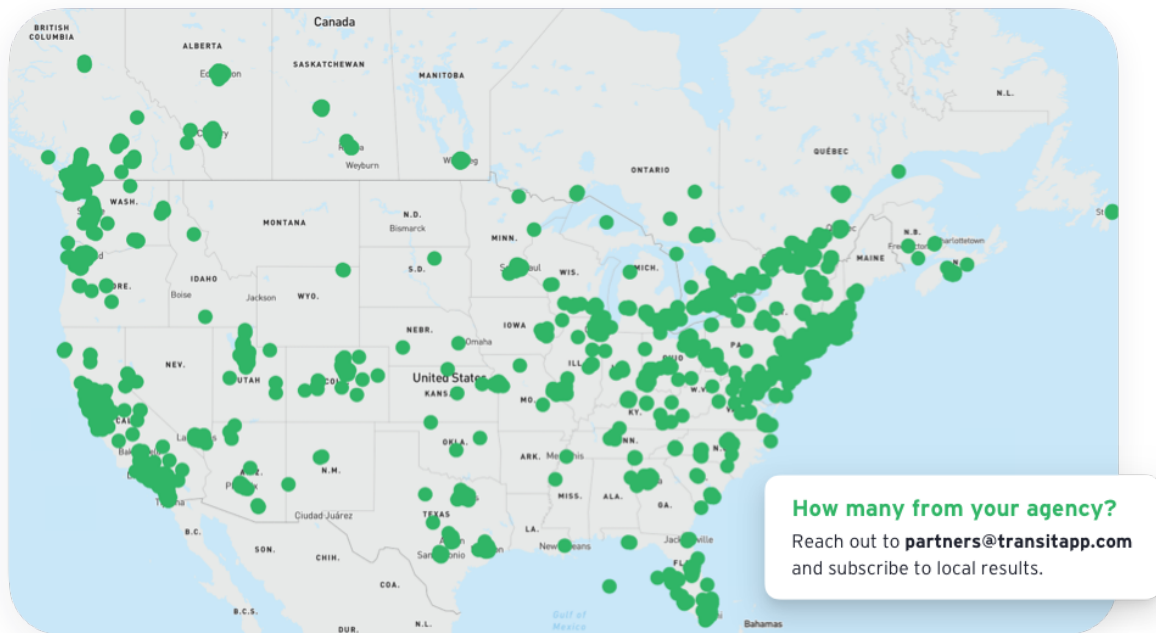


transit

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EXECUTIVE SUMMARY



~20k

RESPONSES
IN NORTH AMERICA

12k+

FROM 

7k+

FROM 

The COVID-19 pandemic is, unfortunately, far from over. To help agencies as they continue to respond to the pandemic, Transit's November 2020 survey set out to understand what riders need, their future plans, and their perceptions of public transit. The results highlight some surprising insights and potentially low-cost opportunities for agencies.

Most importantly, there seems to be a risk-perception obstacle for public transit right now: a whopping one in six survey respondents thought they were at higher risk of contracting COVID-19 on public transit than at a large indoor gathering, the gym, or an office.

The good news is that survey respondents believe in public transit for the long term. Only 4.5% of respondents said they will never resume their pre-pandemic level of use of public transit. Furthermore, satisfaction ratings for pandemic-era service showed that riders, on average, have positive feelings toward their agencies.

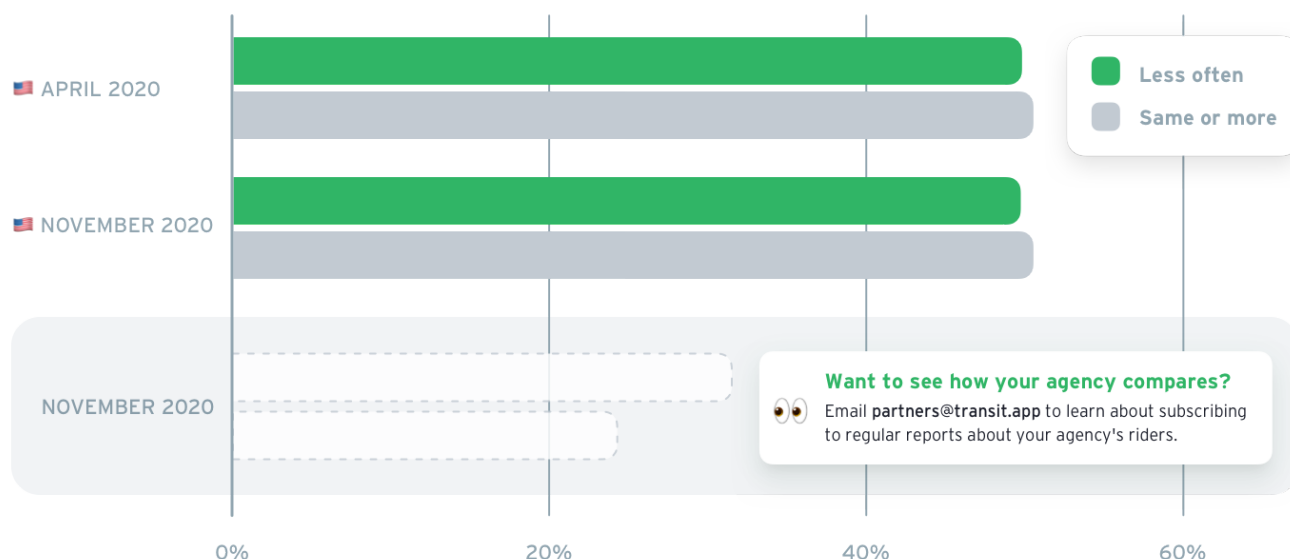
The following report summarizes the results of the survey in detail, including satisfaction ratings with local agencies, Net Promoter Scores, and more. Notable findings include:

- Among users who are riding less during the pandemic, 13% said they will return within the next three months (December 2020 through February 2021).
- Only 4.5% of all respondents said they will never return to public transit.
- Car ownership among survey respondents seems to have increased over the course of the pandemic, in both car-heavy cities like Los Angeles and transit-heavy cities like New York City.
- 16% of respondents said that public transit is riskier than a list of activities that includes large indoor gatherings, showing that there is a need for education campaigns that alleviate COVID-19 anxiety and give people the facts about transit's safety.
- Self-reported mask adoption is above 99%. Where there is comparative data, from a targeted late-summer survey in Saskatoon, mask adoption is higher in November than it was in September, indicating a possible increase in adoption over time.

SURVEY RESULTS: US 🇺🇸

RIDING DURING THE PANDEMIC

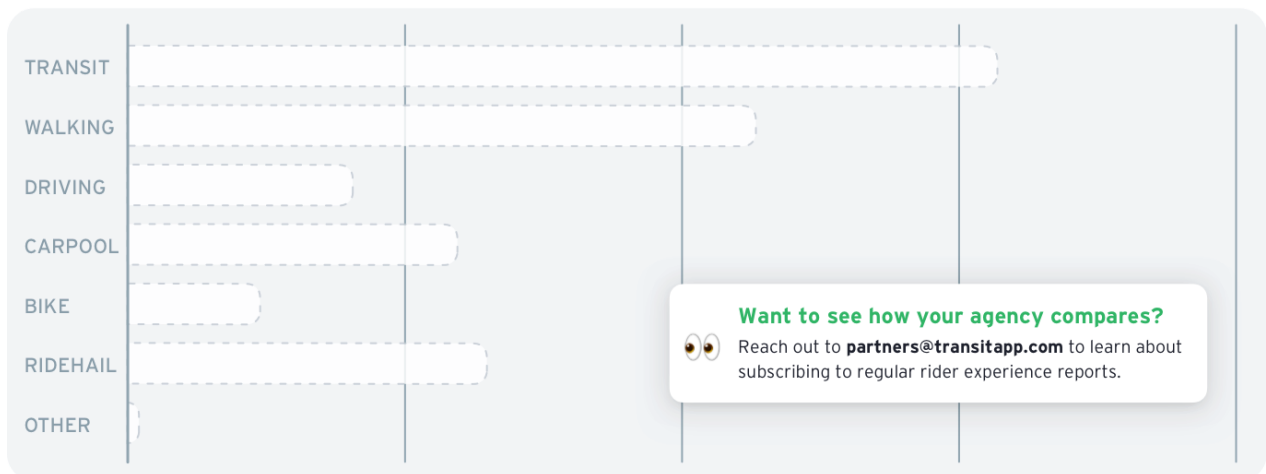
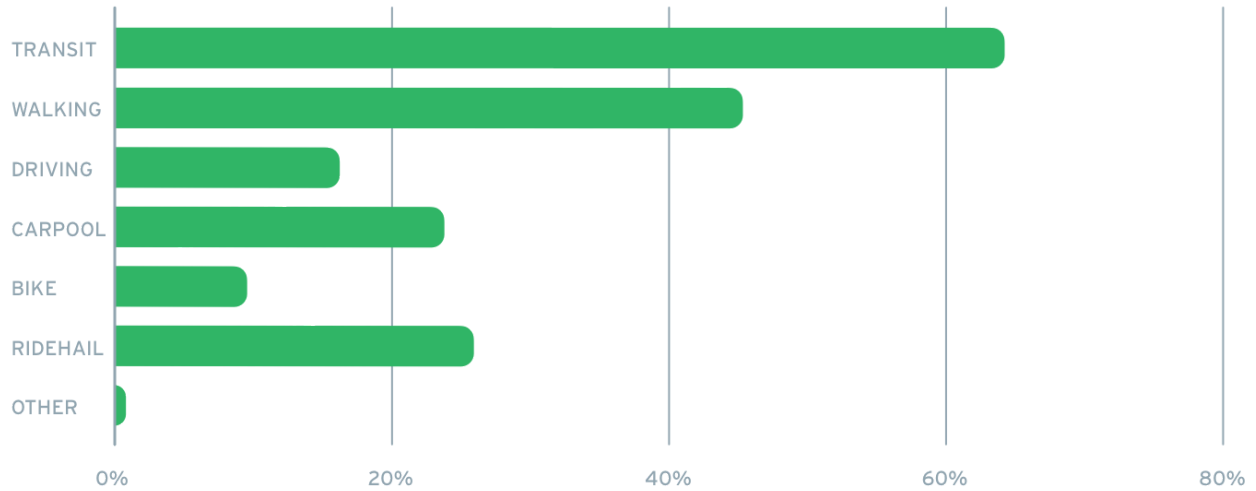
HOW OFTEN DO YOU RIDE, COMPARED TO BEFORE THE PANDEMIC?



- We surveyed Transit's users in April 2020 and again in November 2020. 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 deleted Transit or stopped riding public transit between April and November are underrepresented. So it makes sense that overall self-reported riding frequency, compared to before the pandemic, didn't change significantly between April and November.
- 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 from April to November

MODE SHIFT

WHICH MODES DO YOU RELY ON MORE THAN BEFORE THE PANDEMIC?

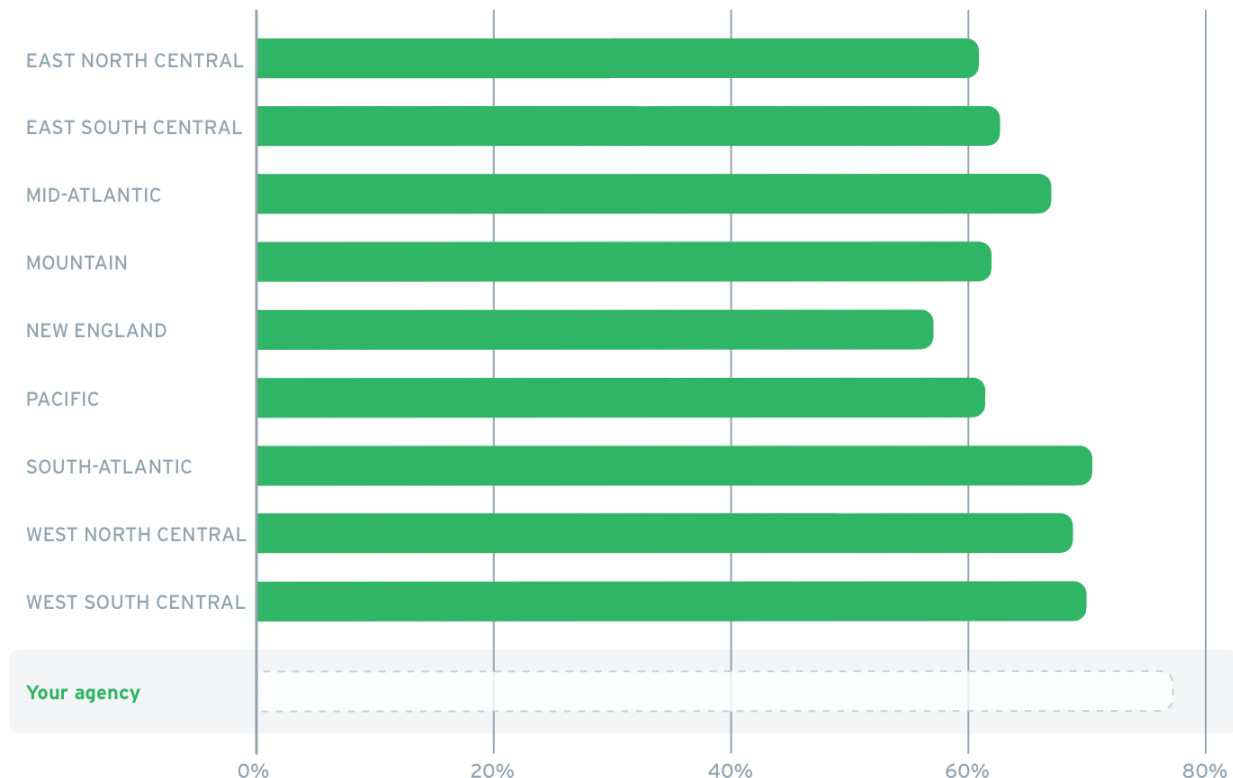


- In April, we asked users two questions: which modes they typically used before the pandemic, and which they typically used during the pandemic. In November, we simply asked which modes they use disproportionately more than before the pandemic.
- In April, 12.5% of respondents who answered the survey in the Transit app stopped using public transit during the pandemic, while only 1.6% said that they had been riding during the pandemic but not before.
- The November survey question is different and not comparable to April's statistics. It is interesting that 64% of November respondents said that they rely on public transit more during the pandemic. This could be interpreted as strong evidence that those who use public transit rely

on public transit deeply, such as essential workers, people without cars, and people with accessibility needs (38% of survey respondents have at least one accessibility need), as well as people who believe in public transit.

- Regionally, riders in the South Atlantic US were most likely to say they rely on public transit more now than before the pandemic (70%), while people in New England were the least likely to say this (57%).

DO YOU RELY ON PUBLIC TRANSIT MORE NOW THAN BEFORE THE PANDEMIC?



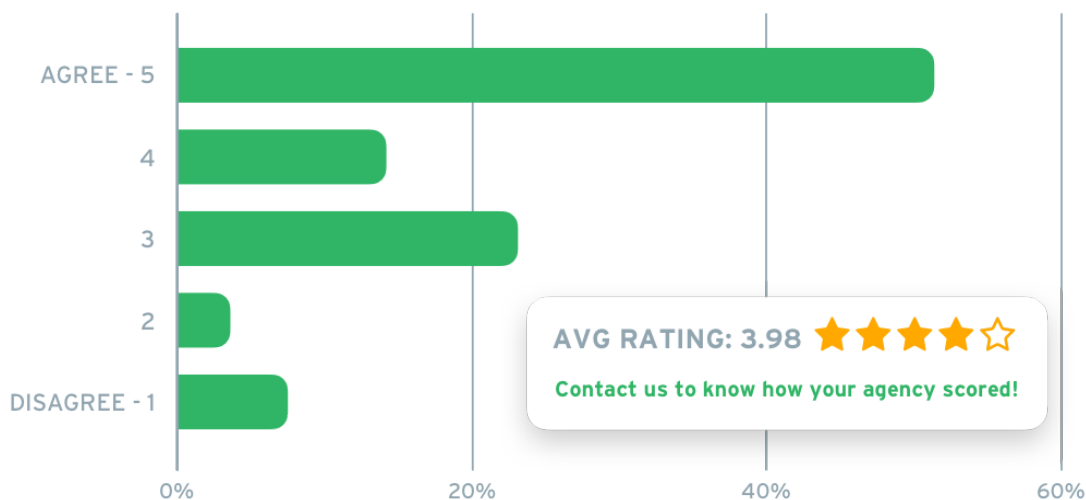
MASKS DURING THE PANDEMIC

COMPLIANCE

- 99.2% of respondents said they wear a mask on public transit** or plan to wear one next time they ride.
- Of the respondents who said they do not or will not wear a mask, they are disproportionately located in the East South Central (KY, TN, MS, AL) and Mountain regions of the US. It's important to remember, though, that the "no" rate is low across all regions, and the differences are not statistically significantly different.

- Since the question relies on self-reporting, it suffers from social desirability bias; in other words, the tendency for people to answer in a way that is socially acceptable, even if it isn't true. We can, however, compare responses to the same question over time. In a targeted local survey in Saskatoon in September, 92% of respondents said that they do or will wear a mask. In November, when Saskatoon riders were asked the question again, 99.6% of respondents said that they do. While the true value is very likely lower, there seems to be an increase in mask adoption on public transit, at least among Transit app users.

"I WOULD RIDE MORE OFTEN IF MY AGENCY COULD ENFORCE THE USE OF MASKS"



IMPORTANCE OF MASK ENFORCEMENT

Respondents were asked to agree (5) or disagree (1) with the statement: "I would ride public transit more often if my agency could enforce the use of masks."

- With a mean score of 3.98, Americans predominantly agree that mask enforcement would encourage them to ride transit more often.
- 66% of respondents agreed with a score of 4 or 5 (agree that they would ride more with mask enforcement).
- 23% of respondents were neutral
- 11% of respondents disagreed, with a score of 1 or 2

SATISFACTION RATINGS

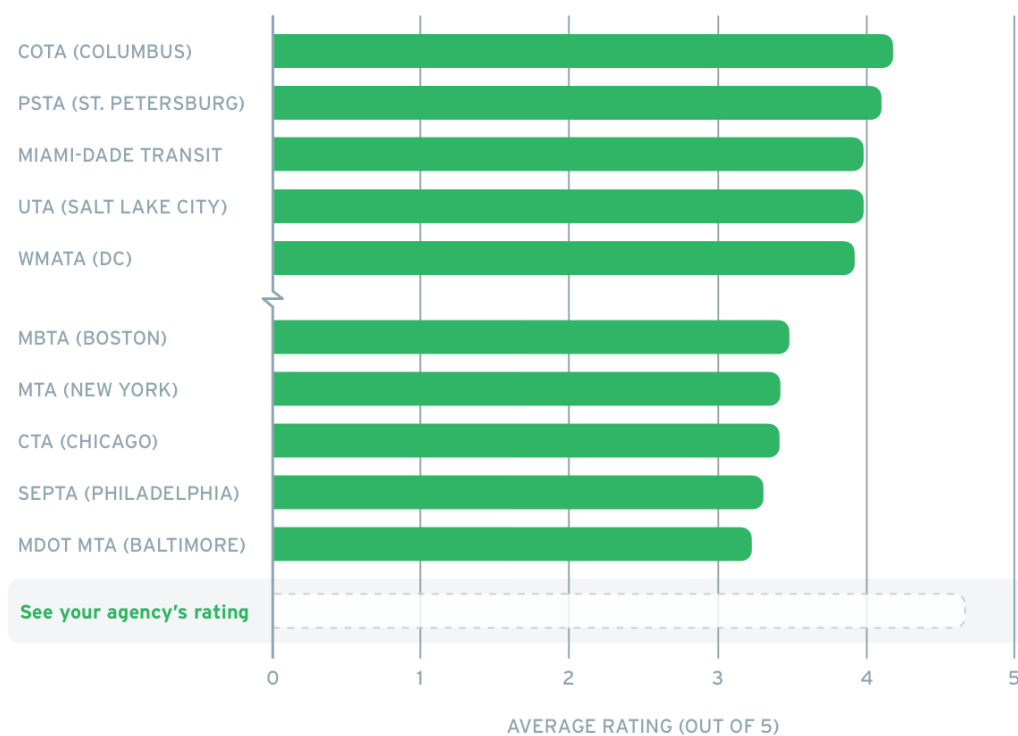
Survey respondents were asked to rate their local agency on a five-point scale, with the following prompts:

- **Agency COVID-19 safety:** "I am satisfied with my local agency's safety measures during COVID-19."
- **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)."
- **Use of resources:** "My agency has done the best they can with the budget and resources available."
- **Agency alerts:** "I feel well informed by my agency about route disruptions and changes."
- **Agency reliability:** "My agency is on time and reliable."

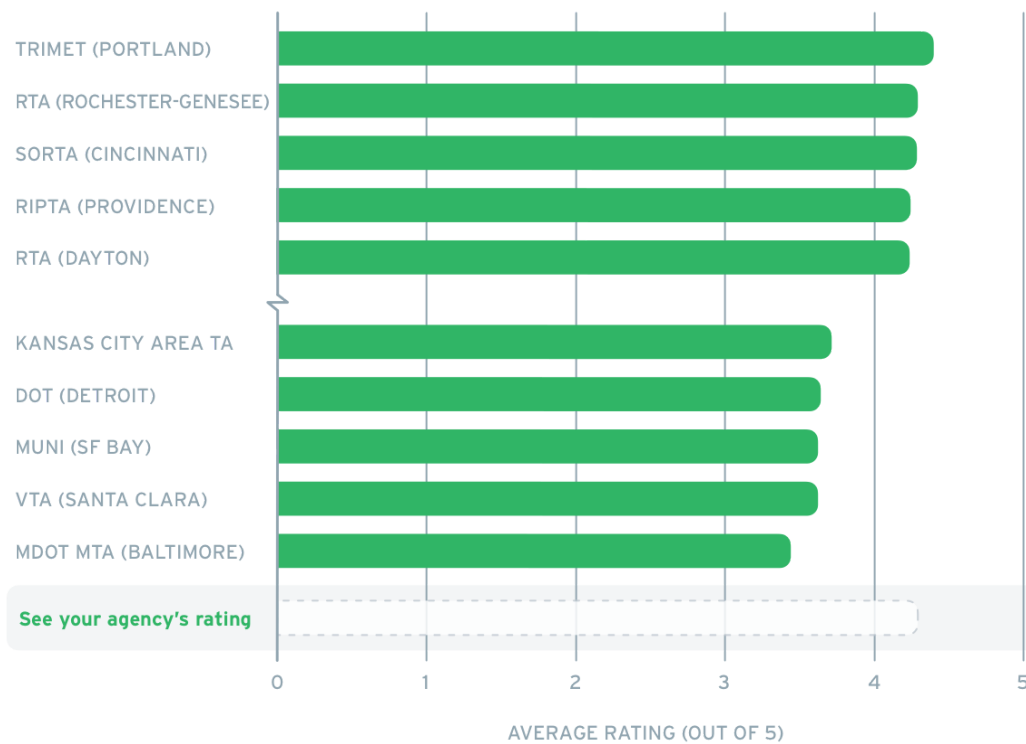
RIDER SATISFACTION WITH LOCAL TRANSIT AGENCY



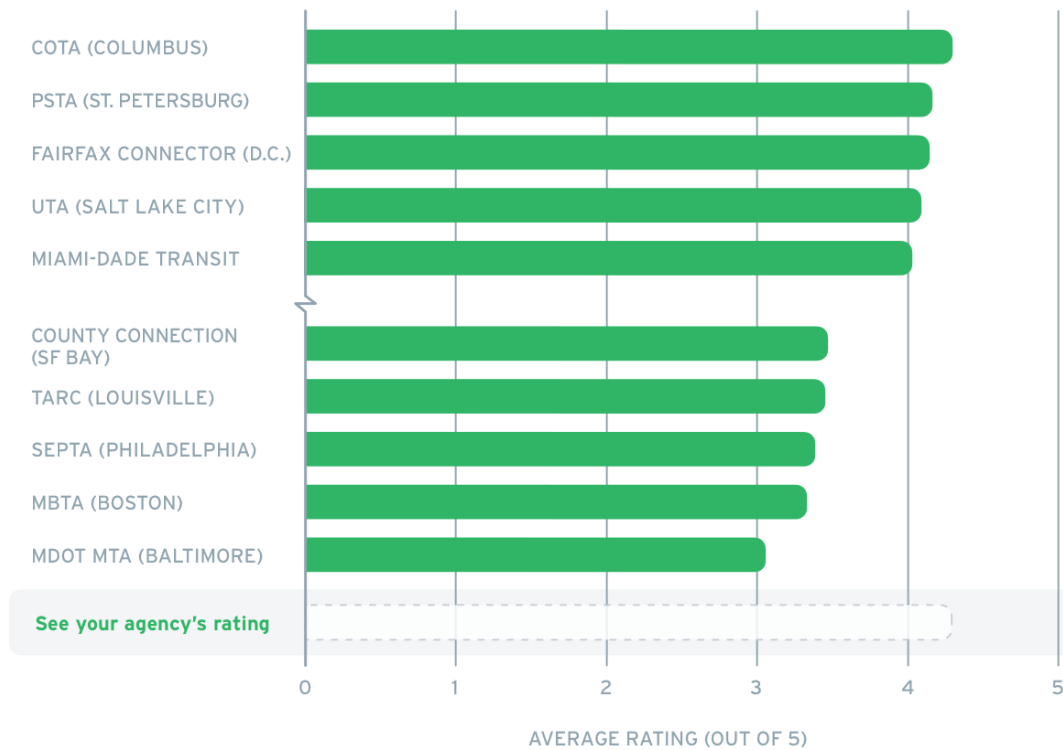
SAFETY - TOP / BOTTOM 5 AGENCIES



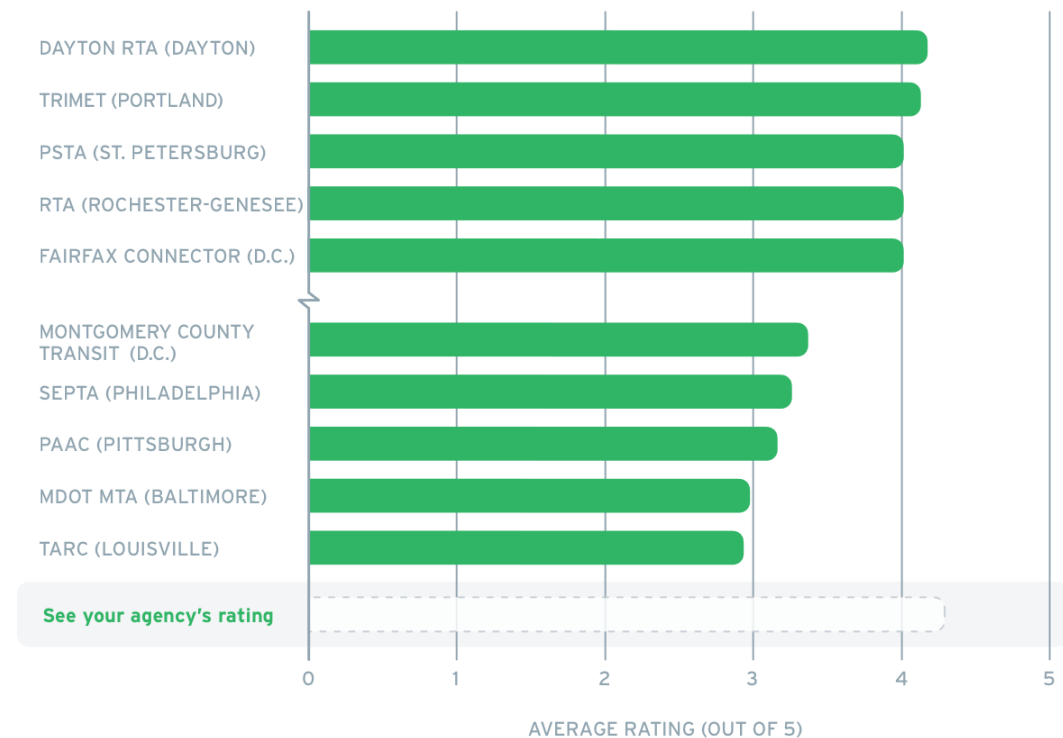
SERVICE - TOP / BOTTOM 5 AGENCIES



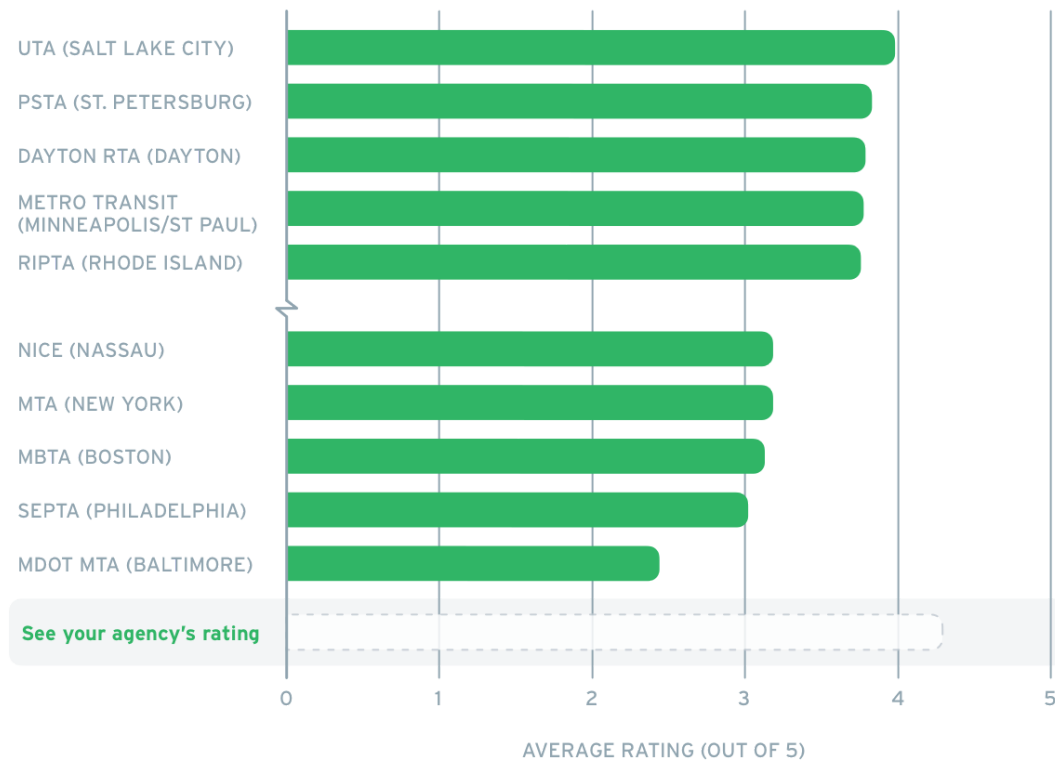
USE OF RESOURCES DURING COVID-19 - TOP / BOTTOM 5 AGENCIES



COMMUNICATION OF DISRUPTIONS AND CHANGES - TOP / BOTTOM 5 AGENCIES



RELIABILITY - TOP / BOTTOM 5 AGENCIES



PERCEIVED RISK OF RIDING PUBLIC TRANSIT

Transit was curious how riders perceived 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?”

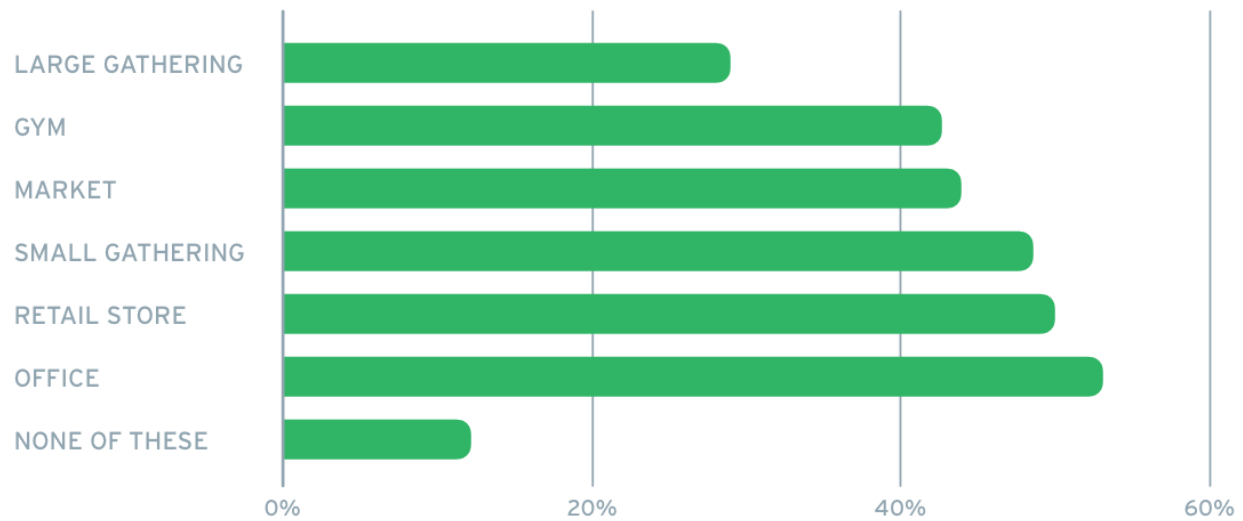
Multiple responses were possible; percentages represent the percent of users who thought that the given activity is riskier than riding public transit.

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](#))

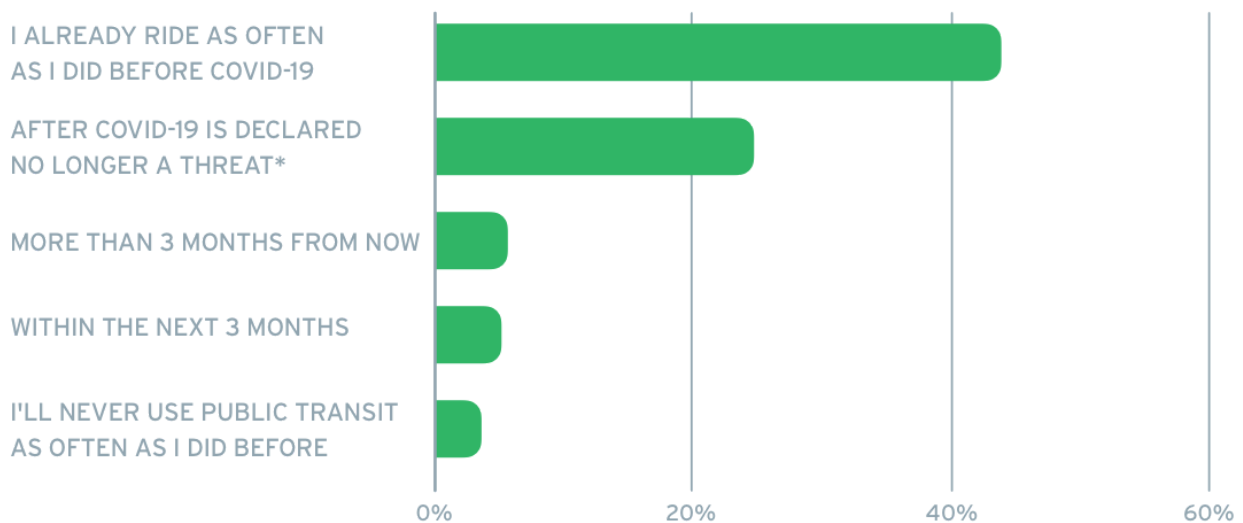
The results from this question demonstrate that public transit does have a perception problem. A surprising 16% of respondents said that public transit is riskier than all of the given activities — that’s a substantial fraction of riders who feel safer at a large indoor gathering than on public transit. And fewer than half of respondents thought the gym is riskier than riding public transit!

Regionally, people in New England were the most likely to think that large gatherings are riskier than riding public transit, while people in the South Atlantic were least likely to believe this.

PERCENT OF RIDERS WHO CONSIDER TRANSIT RISKIER THAN...



WHEN RIDERS WILL RESUME USING PUBLIC TRANSIT



* whenever that is
(e.g., due to mass vaccination)



Want to see how your agency compares?

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

-
- 53% of respondents say they are riding with the same frequency as they did before the pandemic. 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.
 - Of the remaining respondents who are not riding as often as before COVID-19, 63% of them will not return to public transit until the pandemic ends. This is unfortunate news for transit agencies hoping for more riders, of course. But in addition to riders who still rely on public transit, a portion plan on returning soon: 13% of those not riding as often as before said they will return within the next three months (December 2020 through February 2021).
 - Only 4.5% of all respondents said they will never return to public transit (7.4% among those who did not say they are riding with the same frequency as pre-pandemic).

NET PROMOTER SCORE

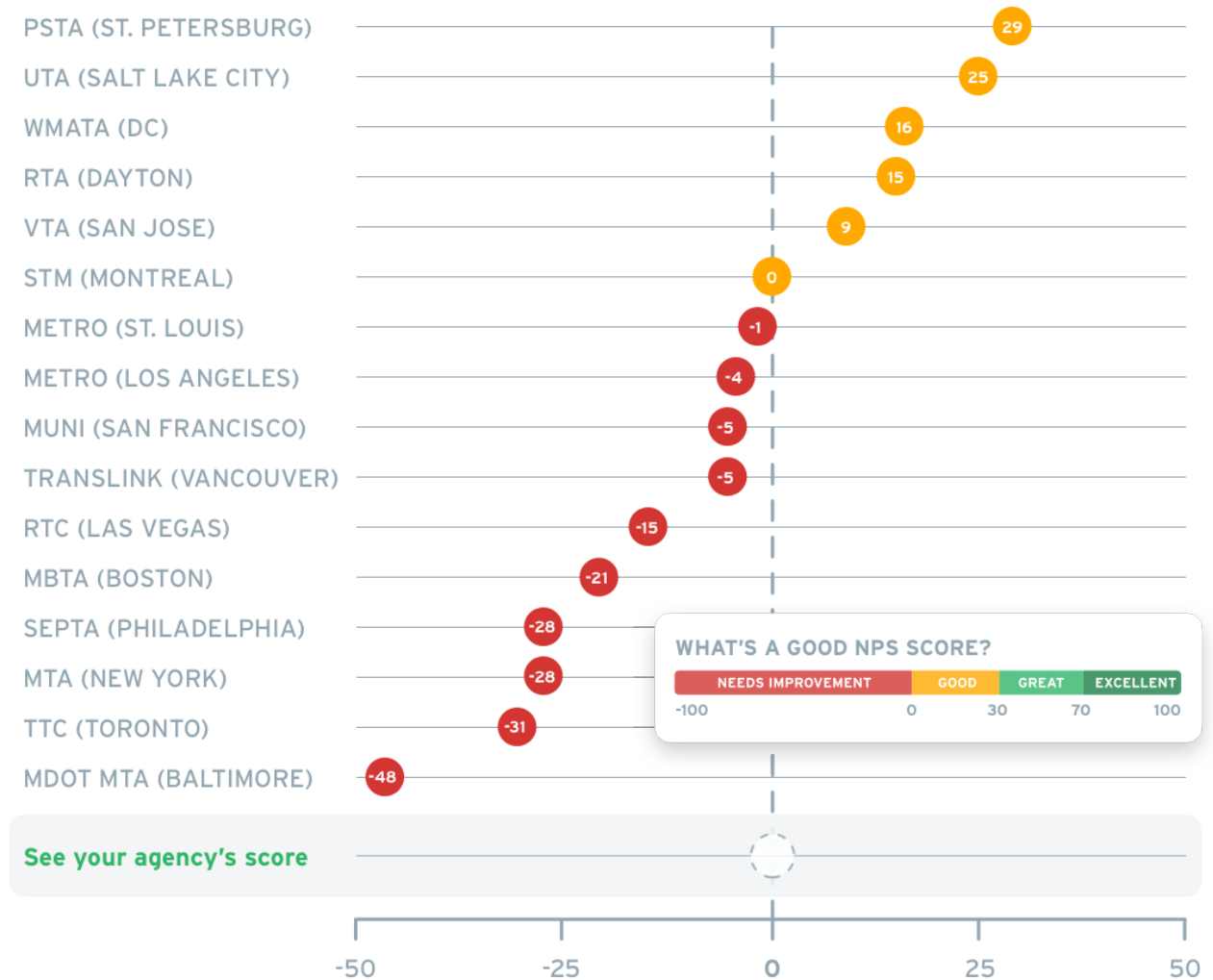
The Net Promoter Score is a scoring system common in marketing that uses a 10-point scale. The calculation is the percent of responses of nine or ten minus the percent of responses of six or below. In the marketing world, a common rule of thumb is:

- Needs improvement: -100 to 0
- Good: 0 to 30
- Great: 30 to 70
- Excellent: 70-100

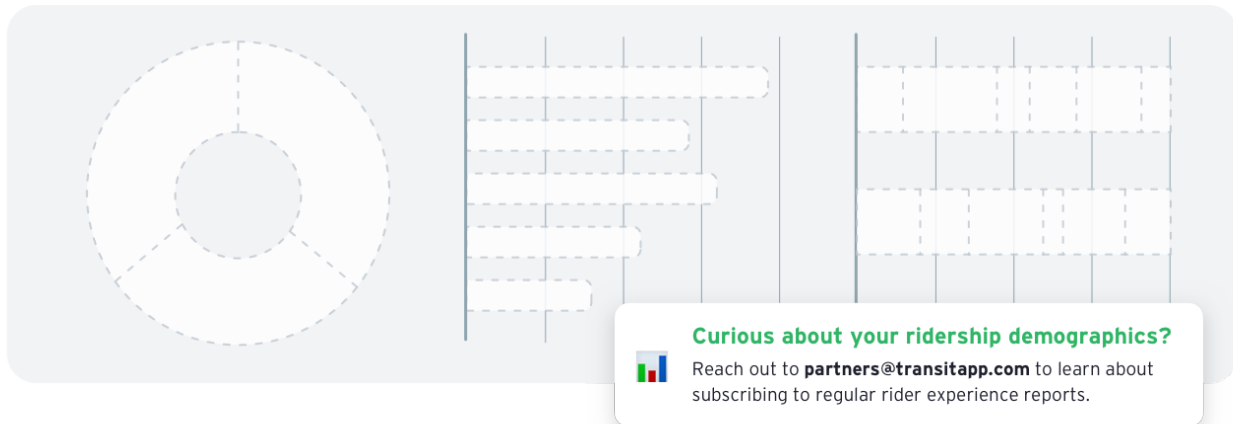
Interestingly, these results are not just geographically distributed: it really does matter what individual agencies are doing. For example, VTA and Muni in the Bay Area are neighbours and may share an overlapping set of riders, but riders on VTA are much more likely to recommend their agency to a friend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

By comparison, 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](#))

HOW LIKELY ARE RIDERS TO RECOMMEND THEIR TRANSIT AGENCY TO A FRIEND?

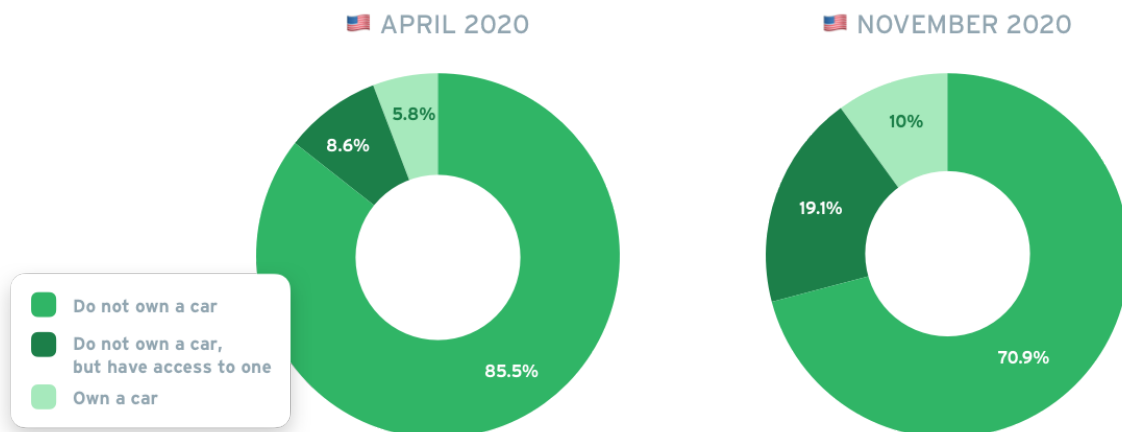


RIDER DEMOGRAPHICS



CAR OWNERSHIP

CAR OWNERSHIP: APRIL VS. NOVEMBER

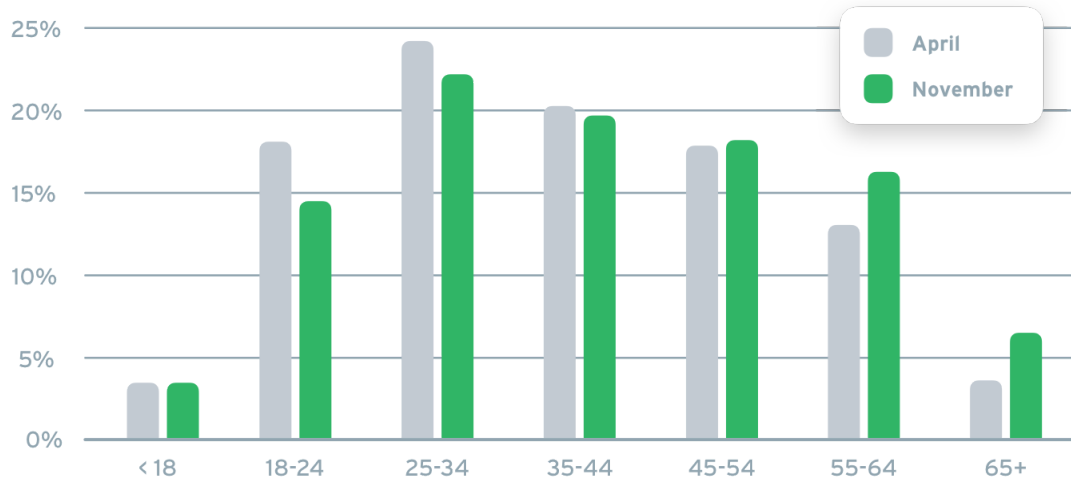


- The percentage of car owners in November is more than twice the percentage in April, (19.1% vs. 8.6%). The percentage of respondents who do not own but have access to a car is also higher, 10.0% in November vs. 5.8% in April.
- It's important to filter this result through the survey methodology: all 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 sample, assuming that car owners would not open Transit at all, but this is not the case.

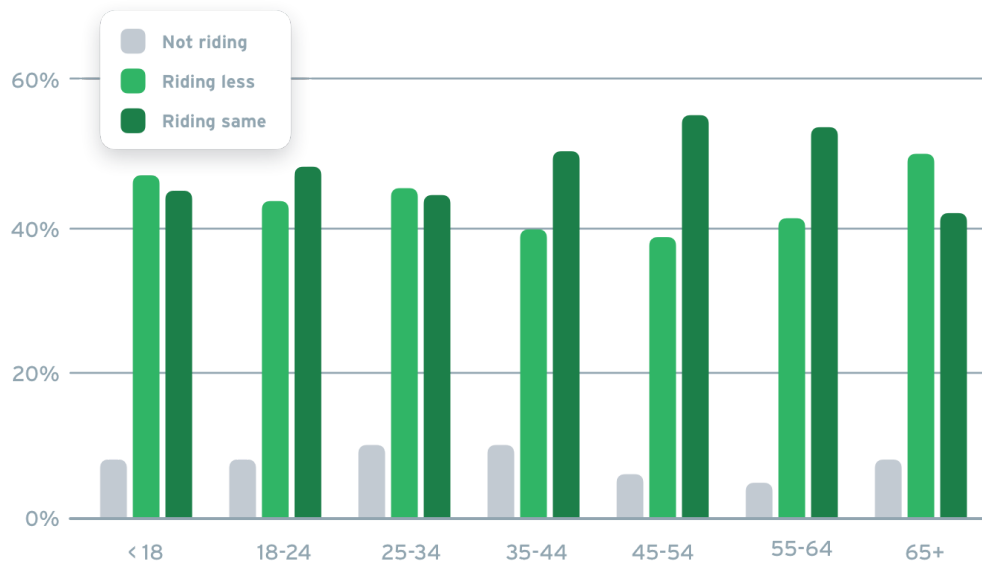
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- This pattern is as true in Los Angeles as it does in New York:
 - NYC: 8.1% own and 6.1% have access to a car in April; 17.5% own and 11.1% have access to a car in November.
 - LA: 8.4% own and 6.6% have access to a car in April; 16.2% own and 9.5% have access to a car in November.
 - Out of 12,228 respondents to the November survey, we can identify 643 who also answered the April survey. Even among this group, car ownership is higher in November: 11.9% own vs. 9.3% in April, and 10.3% have access vs. 7.7% in April, indicating that car ownership among transit riders may have risen during the course of the pandemic.

AGE

AGE: APRIL VS. NOVEMBER



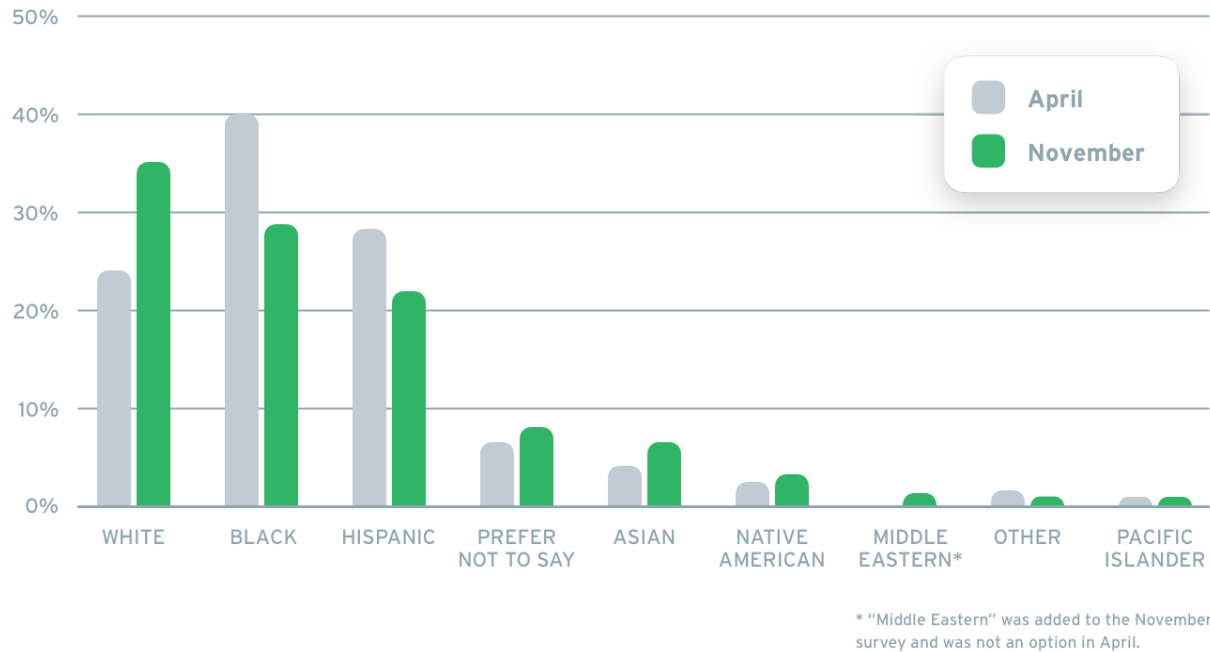
AGE BY RIDING FREQUENCY, NOVEMBER



- Overall, the 18-34 age bracket is less present in the November sample than the April sample, suggesting that this group is using public transportation less than in April.
- Within the November results, the 25-44 age group is more likely to be riding less (compared to pre-pandemic).

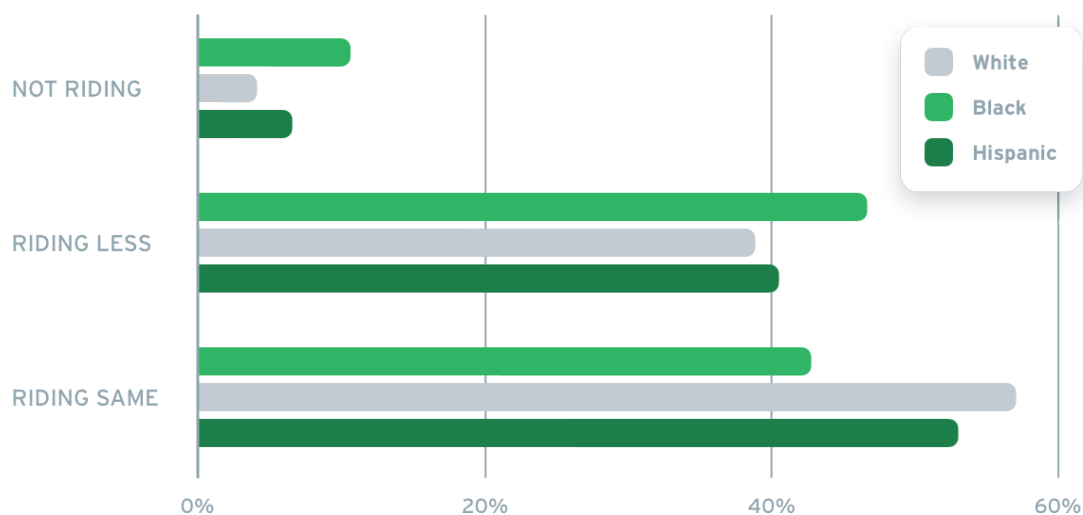
RACE

RACE: APRIL VS. NOVEMBER



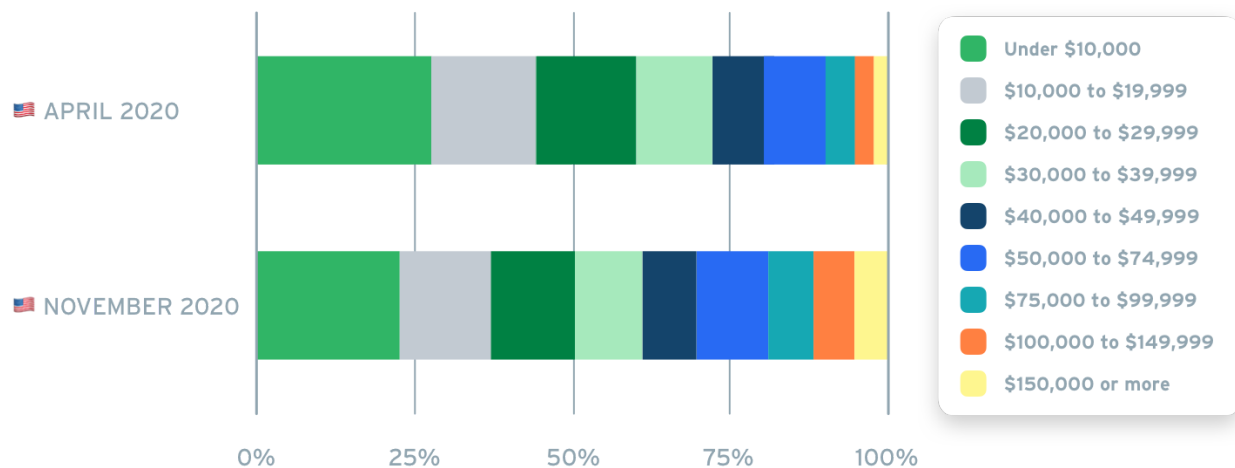
- April's extreme racial disparity seems to have lessened somewhat, although people of colour are still disproportionately represented compared to both the population at large and pre-pandemic ridership.

RACE BY RIDING FREQUENCY, NOVEMBER 2020



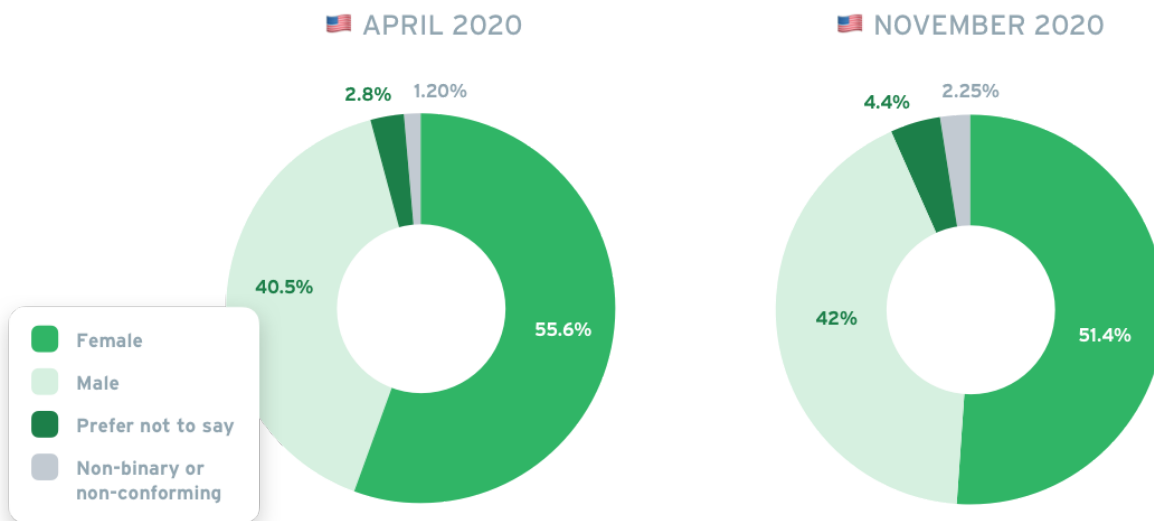
INCOME

INCOME: APRIL VS. NOVEMBER



GENDER

GENDER: APRIL VS. NOVEMBER



- There is a slightly smaller gender imbalance in November (female:male = 1.22) than in April (female:male = 1.37). The shift towards pre-pandemic demographics likely reflects the return of some commuters to public transit since the initial lockdown.

OCCUPATION

THE TOP FIVE OCCUPATIONS FROM THE NOVEMBER SURVEY WERE:

	APRIL 2020	NOV 2020
RETAIL (including grocery and pharmacy sales jobs)	9.0%	9.7%
FOOD PREPARATION AND SERVING	17.0%	8.4%
HEALTHCARE SUPPORT	10.2%	5.6%
HEALTHCARE PRACTITIONERS	6.4%	5.6%
EDUCATION, TRAINING, AND LIBRARY OCCUPATIONS	3.1%	5.2%

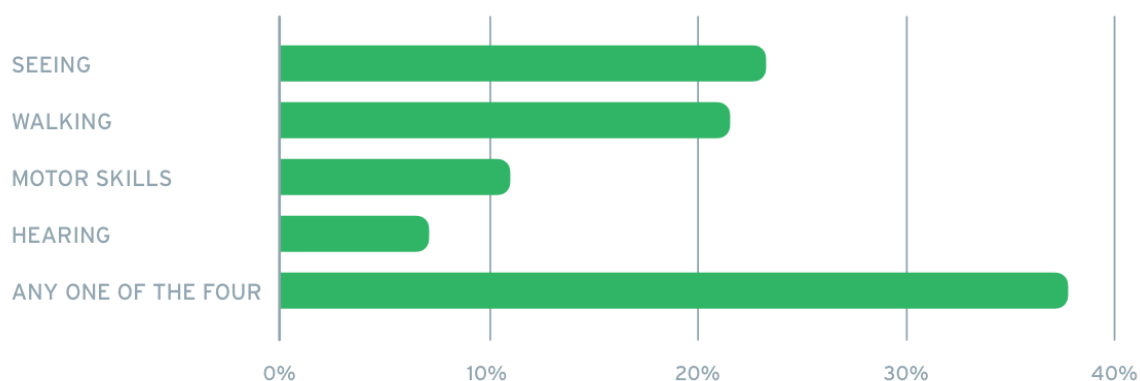
In April, the top five occupations were food preparation and serving, healthcare support, sales and related occupations, healthcare practitioners, and building and grounds cleaning and maintenance.

While essential workers are still the most represented groups among survey respondents, the proportion of food preparation and healthcare workers has decreased since April, and the proportions of non-essential workers (people with occupations in computers and mathematics, law, or similar fields) have increased since April. This reflects an overall trend in Transit app data and agency ridership data: some riders have returned to transit since the start of the pandemic, but not in large numbers.

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 38% of respondents said they have difficulty in at least one of these categories, with 95% of all respondents to the survey answering this question.

DO YOU HAVE DIFFICULTY WITH...



BACKGROUND

GOALS

The survey summarized in this report ran in November 2020, with the goal of providing a snapshot of ridership needs during the COVID-19 pandemic. Transit app ran a similar survey in April 2020, allowing for a comparison of germane topics between surveys. Topics asked about in the survey include mask usage, perception of safety on public transit, risk tolerance, and plans to return to public transit use.

Questions on the survey, developed by Transit, fell into five main groups: current riding habits and needs, future riding habits and needs, risk perception, agency ratings, and demographics, including work-from-home plans and industry of employment.

METHODOLOGY

DISSEMINATION

The survey consists of 13 ridership questions, 11 demographic questions, and one meta-survey question, asking whether the respondent is willing to answer the optional demographic questions. The survey launched on November 9, 2020, remained open for approximately 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 responders on surveys do occur, but typically at a low rate. In the November survey, there were no suspected repeat responses.

EXCLUSION

Responses were included when the user responded to all fourteen 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. The response rate to individual demographic questions ranged from 92% (occupation) to over 95% (gender), for all of the respondents who answered 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. 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.