



# Public Transit

Rebuild ridership by rebuilding trust



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# Introduction

As the COVID-19 pandemic forced so many of us to maintain social distances, work from home, and curtail all but necessary travel, transit ridership plummeted. So did the public's confidence in transit agencies' abilities to make travel safe.

The first step in the process of rebuilding trust is understanding the new reality in which transit passengers live. The pandemic transformed everything. How and where we work. How we educate our children. How we eat, socialize and entertain ourselves. Some of our new habits and rituals will dissipate over time.

But others will stick. Accenture recently carried out a comprehensive research study to better understand how these new and enduring behaviors and circumstances are impacting public transit. It has also identified opportunities transit agencies can pursue to rebuild trust and confidence in their services.

## About the research

In 2021, Accenture launched research to better understand public transit riders' mindsets, preferences and behaviors.

The study included a survey of 6,200+ transit users across Asia Pacific, North America and Europe, as well as qualitative passenger focus groups, and interviews with urban mobility experts (see page 19 for more information).



# Trust in transit

Almost all the public transit experts we interviewed noted that the most urgent challenge facing operators today is the dramatic COVID-19-induced drop in ridership. This translates into significant revenue losses, which in turn affect everything from basic operational budgets to capital investments.

It is a dire time for public transit. Unfortunately, the challenges the industry faces won't be solved through time alone. While 50% of passengers surveyed globally anticipate daily or frequent public transit trips in a post-pandemic world, the ways and hours in which they use public transit, their expectations, and their intentions for traveling may all be quite different. The trust they place in public transit can no longer be taken for granted.

When asked specifically about the factors that would lead them to trust in commuting freely, having the majority of their fellow passengers being vaccinated topped the list. The second most important trust-builder was public transit operators' ability to prove they are prepared to handle future pandemics. Such visible preparedness was particularly important for daily commuters, students and respondents from Singapore, Hong Kong and Paris.

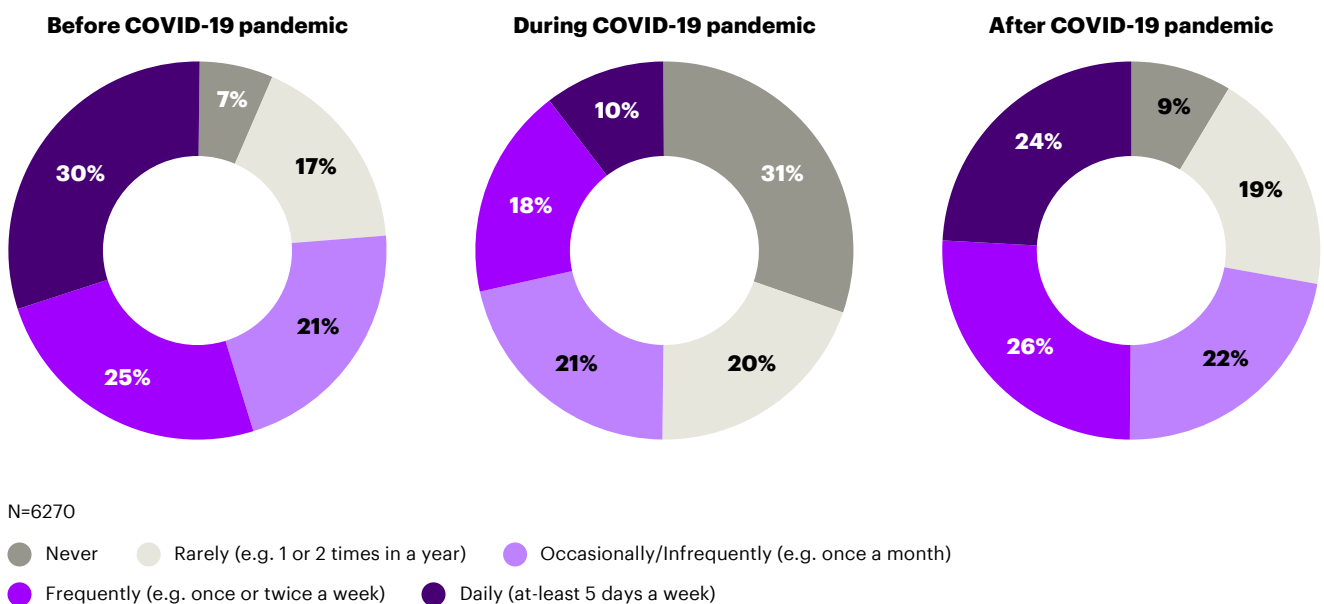
While these two factors—vaccination rates and transit operators' preparedness—may help shape trust in transit, they aren't silver bullets. There are still large numbers of passengers for whom these factors will not engender the trust that's needed. Regaining trust will require transit operators to adopt nuanced, multi-faceted and personalized approaches.

**“The amount of patronage coming into the network has dropped significantly. At worst, it's 70% from the normal days. Everything is dependent on the patronage.”**

**Industry Expert, Asia Pacific**

**Figure 1. Planned usage of public transport is expected to stay nearly the same in the post-pandemic world**

**Survey question: How often do you use or plan to use public transport?**



# Who are you really serving?

While ridership is expected to rebound, public transit operators can't be complacent. They can't simply wait for normalcy to return.

For one thing, it may take years before passengers' fears subside and for riders to be comfortable enough to return. Secondly, and more importantly, the "normalcy" that public transit operators are waiting for no longer exists. Since the pandemic's onset, people have revisited every aspect of their lives—their priorities, values and rituals. As restrictions are being lifted, the reality is that several new attitudes that people have adopted are here to stay—including their outlook on travel and transportation. In other words, ridership may soon return to previous levels, but the riders will be fundamentally different.

For that reason, operators should rethink the services they offer and identify opportunities to come back stronger, with more appealing passenger experiences.

Before transforming experiences and rebuilding trust, public transit operators need to understand who they serve today—and who they will serve in the future. Historically, operators haven't focused on gathering passenger insights because they didn't need them. Before the pandemic, they may have catered to a few distinct segments of the population, such as 9-5 commuters, shift workers and leisure travelers. But their services, offered equally to all, offered little opportunity for personalization.

COVID-19 has ushered in new mobility behaviors, habits and rituals. How people shop, socialize, eat and even do mundane tasks such as renewing their drivers' licenses have all changed. It's safe to assume that some of these changes will stick. Our research suggests these new habits are reflected in their transit use. In response, operators now have the opportunity, if not the obligation, to create passenger experiences that align to the values, expectations and preferences of these new traveler types.

**In our research, we identified four broad groups of passengers based on their expected utilization of transit services, with some passengers represented in more than one category.**

**17%** of passengers are obliged to use public transit systems. They have no other means of transportation.

**16%** have not changed their attitudes toward traveling. They expect their overall travel patterns and use of public transit to remain the same.

**38%** plan to return to their offices when restrictions are lifted.

**41%** have switched from public transit to private vehicles, bikes or walking. They have no intention of returning to public transit, even when it's safe to do so. The good news for transit operators is that these passengers were only rare or occasional users of public transit in the past.

While understanding passengers' expected utilization of public transit services is helpful for route planning and scheduling purposes, it doesn't really help operators pinpoint the types of services and experiences they should offer. The pandemic and its inherent stressors have profoundly affected peoples' desire and willingness to use public transit. Insights into passengers' mental wellbeing can help operators zero in on the experiences that will be most appealing or reassuring to stressed riders.

For example, women have been disproportionately affected by the COVID-19 recession. The United Nations predicts that the result might be a prolonged dip in women's incomes and labor force participation.<sup>1</sup> Coupled with this, our research indicates that female transit passengers are more fearful of traveling again. This fear compounds the gender inequality issues that COVID-19 has revealed. Understanding the impact on women and their mental health allows public transit operators to rethink their purpose—to create inclusive services that not only move people safely to their physical destinations, but also move women to a place of gender equality and social wellbeing.

## **Transportation assets aren't the only things breaking down.**

**36%** of our survey respondents have experienced a drop in income during the pandemic.

**33%** are finding it tough to achieve a work/life balance.

**28%** feel more anxious and insecure about the future.

**21%** feel lonely and isolated.

**“You hear operators say: I can't wait till things return to normal! I think that's the wrong type of thinking. It's not about waiting for things to return to normal; it's about transforming now because there's going to be a new normal.”**

**Industry Expert, North America**

<sup>1</sup> UN Policy Brief: The impact of COVID-19 on Women, 9 April 2020.





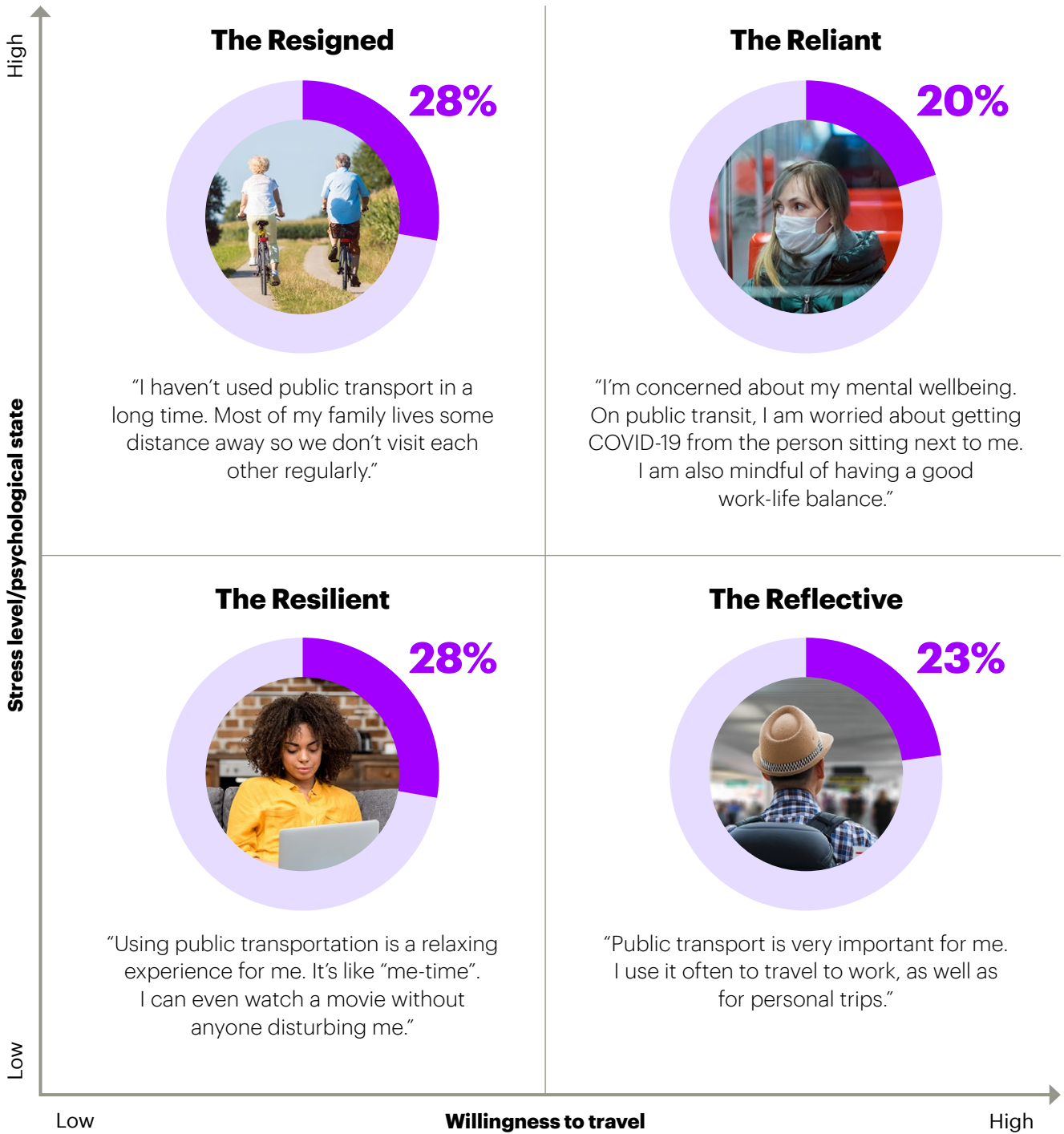
# Things are about to get persona

By bringing these two dimensions—passengers’ mental health and their desire or willingness to travel—together, we were able to identify four personas that public transit operators should consider when reimagining their offerings and passenger experiences. These do not represent new passengers; they are existing passengers viewed through a new lens.



**In the world of these four personas, a one-size engagement strategy won't work. Each persona type is equally important and must be catered to—but in different ways. Our analysis provides insights into where public transit operators may want to focus their energies to address each persona's needs.**

**Figure 2. Four passenger types will steer public transit operators to the future**



Note: Percentages do not add up to 100% due to rounding issues

## Reliant passengers

The distinguishing characteristics of reliant passengers are their feelings of loneliness, anxiety and insecurity about the future, as well as the challenges they face to achieve work/life balance.

Reliant passengers, making up about 20% of ridership, most closely resemble “pre-COVID-19” passengers—students and younger full-time employees who rely on public transit often, if not daily. Reliant passengers are still willing to travel today, but they are stressed by the prospect. Mostly female and single, this group is more anxious and lonelier overall. And they have struggled the most to achieve work/life balance.

To rebuild trust with this persona group, operators need to show they are prepared to handle pandemics in the future. This is a winning trust factor for more than half (56%) of reliant passengers. One of the best ways to prove their future readiness is by taking visible, reassuring actions that alleviate stress or health concerns. The gaps between “importance” and “satisfaction levels” of current safety measures provide valuable clues to where operators might focus their efforts before, during and after the journey.

Importantly, these actions don't have to be big or expensive. Micro-interactions can create high-trust moments that foster trust and safe physical and mental spaces for riders. Changing carriage sanitation schedules and making them visible can offer peace of mind to worried passengers. So can deploying transit “ambassadors,” responsible for implementing safe distancing measures or reminding passengers of safety protocols. Other measures might include using technology to provide real-time notifications or trip-planning solutions for alternative routes and last-mile connectivity.

Physical wellbeing is only one part of the equation. Reliant passengers' mental wellbeing is equally important. Creating environments during the journey that allow passengers to enjoy “me time” can help alleviate stress. So can crowd management improvements, “quiet” hours or sections, and new services that take their minds off their day-to-day worries.

Finally, operators can make reliant passengers more comfortable by making their general ways of working more transparent. While some operators feel people don't care about their day-to-day operations, our research shows that's not the case for more than a third of passengers globally (and nearly half of all passengers in Hong Kong and Singapore). Technologies can clearly help—especially contactless touchpoints and real-time demand-tracking apps. Such apps make it possible for riders to not only make more informed decisions about when (and which route) to travel, but also gain a greater sense of control over their travel experience.

**“I'll continue to take mass transit to work.  
It's really my only option.”**

**Public Transit User, North America**

### Figure 3. Customers' satisfaction with transit operators' safety measures don't match the importance they place on those measures

Survey question: How important are the measures that public transit operators/agencies are undertaking currently and how satisfied are you?

	Importance		Satisfaction Level
Before Journey	77.8%	Mandating the use of masks, fixed hand sanitizers, etc.	59.6%
	75.5%	Safe distancing measures	53.1%
	69.0%	Ease of booking tickets	52.8%
	62.4%	Contactless experience	48.2%
	57.0%	Special offers/incentives to choose less busy times/routes/transportation modes	37.1%
During Journey	84.3%	Regular disinfecting inside the coaches	50.3%
	78.4%	Safe distancing measures (better crowd management)	51.9%
	77.8%	Fixed hand sanitizers inside the bus/coaches	44.2%
	68.0%	Separate entry/exit doors	45.3%
	61.0%	Installing glass shields between seats	33.7%
After Journey	79.7%	Mandating the use of masks, fixed hand sanitizers, etc.	58.4%
	77.3%	Safe distancing measures	53.0%
	75.5%	Ease of exit at the station	49.8%
	55.4%	Loyalty programs	32.3%
	50.0%	Other mobility options for the last-mile commute	34.6%

N=6270

## Reflective passengers

The distinguishing characteristics of reflective passengers are their increased consciousness of their health and re-evaluation of their priorities and day-to-day needs.

Reflective passengers make up 23% of returning transit riders. They are mostly Millennials, part-time employees or self-employed. As with the reliant group, reflective passengers are more likely to have experienced a pandemic-related drop in income. That may be one reason why this group is less willing to pay more for enhanced transit experiences such as infotainment.

As the name of this persona group implies, these individuals are reconsidering many aspects of their lives. Of all groups, the pandemic has made them much more aware of their health and more committed to healthy lifestyles. In fact, 96% of this group consider themselves health conscious.

Their health concerns, however, are not affecting their willingness to travel. Reflective passengers have made only minimal changes to their travel patterns. But they are by no means reckless; this group is taking necessary precautions. As restrictions are lifted and mobility once again becomes the norm, this group is likely to adjust their schedules to ride outside of peak hours. At the same time, they may find themselves wanting to travel more often for leisure and more consciously than before.



To rebuild trust with reflective passengers, operators need to address their health and safety concerns above all else. Visible sanitation protocols, enforcement of mask-wearing and social-distancing rules, and even route alternatives that expose riders to fewer fellow passengers would likely be well received. Such actions would also reassure the reflective group that operators are prepared to handle the next pandemic.

Additionally, operators should be mindful of new travel trends and opportunities. Our research have found that 9% of all passengers (mostly Millennials) are planning more short leisure trips after the pandemic. Nearly as many (8%) are looking forward to taking longer leisure trips. The reflective group likely falls into this category. They want to live life to its fullest. This suggests that transit operators could craft offerings that allow passengers to pursue new, short-distance experiences (e.g., weekend getaways, winery tours, trips to sporting events or festivals, etc.) or make more frequent or longer trips to visit families and friends.

## Resilient passengers

Resilient passengers are distinguished by the fact that they have embraced working from home and have found joy in pursuing new interests. Their general contentment at home gives them little reason to leave.

Resilient passengers, who make up 28% of operators' ridership, may be among the hardest to lure back. They have fared relatively well during the pandemic. Mostly fulltime employees, they report the highest incomes of all persona groups—and have experienced no drop in income during the pandemic. That's largely because they've been able to work from home. That working arrangement has suited them. They have been content, focusing on hobbies and online activities. Their new rituals and pastimes will certainly be part of their future—including increased online shopping and leisure spend, which was cited by almost half of resilient riders (45%). Only 57% of these passengers plan to return to the office.

The good news is that resilient passengers' travel patterns are likely to remain unchanged once the pandemic ends. The bad news is that they were infrequent users of public transport even before the pandemic. To attract this group in larger

Partnering with travel or hospitality companies or shared services providers could help operators create the seamless, enjoyable experiences that reflective passengers seek. For example, integrating fares with other transit providers and rideshare services would make it easier for riders to get a ticket and pay automatically at the end of their route.

**9% of transit passengers are planning more short leisure trips after the pandemic. Nearly as many are looking forward to taking longer leisure trips.**

numbers, transit operators will need to focus on more amenities and give the resilient travelers a reason to leave their homes.

This may mean offering more perks, such as Wi-Fi or more room/comfort in carriages. It may include additional services, such as seamless scooter/bike rentals at their destination. Because resilient passengers have increased their online shopping (and, presumably, returns) during the pandemic, drop-off and pick-up locations in stations may be appealing.

Also, resilient passengers have a relatively high willingness to pay for enhanced experiences. Operators, where allowed, should explore their options to offer new and premium services that can't be found elsewhere. For these passengers, transit must be more than a means to an end. The journey, itself, must deliver value.

“Since I subscribed to my operator’s email service, I get updates whenever there’s a track closure or schedule change. I think that’s helpful since it helps me plan my journeys. The transparency is there.”

Public Transit User, Europe

## Resigned passengers

The distinguishing characteristics of resigned passengers are their lack of desire to travel, their drop in income during the pandemic and their propensity to have relocated from urban centers.

Resigned passengers make up 28% of transit operators’ ridership. Like the resilient passengers, they will be difficult to attract. The resigned passengers didn’t travel much prior to the pandemic and now have very little desire to do so. In fact, 13% never plan to use public transit again. They are more likely to be retired or unemployed and have recently relocated out of city centers. As a group, resigned passengers have lower average incomes—and their incomes were more likely to have declined during the pandemic.

To target these passengers, operators should look to create affordable transit options. Lower incomes—made even lower due to COVID-19—leave little for this group to spend on travel. Also, because 15% of this group relocated to suburbs and the countryside, transit operators must review whether they are serving this population adequately in their new communities.

Partnering with shared service providers such as car share organizations to provide first-to-last-mile travel may be an option. Passengers would benefit from seamless experiences. Operators would benefit, as well, by not having to invest in expanding their core service to more remote locations.

**13% of resigned passengers never plan to use public transit once the pandemic is over.**

# Make trust the final destination

Today's passenger strategies should be aligned to the needs, fears and preferences of individuals. Those strategies must be built on trust and, specifically, actions that convey transit operators' deep understanding of the people they serve. We believe there are three things operators can do to gain the trust that's needed today.

## Meet your passengers where they are

Transit operators need to understand what passengers want from their transit providers—in terms of getting to their destination, but also beyond transportation. Our research found, for example, that passengers now care slightly less about service reliability and price than they used to. Even booking convenience (e.g. journey planning assistance and ease of payments) came down in terms of importance to passengers. Health, safety and cleanliness are now most important. That's the new reality for all passenger personas, in all cities and regions of the world.

The focus on healthcare notwithstanding, the goal for transit operators should be to understand their passenger segments by considering a variety of measures and then adapt their services and offerings to meet those segments' needs. Our research confirms that the four personas presented above are relevant passenger types for all transit agencies today. Yet some operators' ridership is composed almost entirely of business travelers. Conversely, some operators tend to cater almost exclusively to tourists. The challenge for operators, then, is determining the ratio of their passengers that fit within each of the four categories.

Segmenting passengers in meaningful ways starts with operators collecting passenger data. This poses a challenge, since transit operators typically don't have access to the types of information that other transportation providers such as airlines or rideshare companies do. But there's no reason they can't get it. Traffic statistics offer a wealth of insight into travel patterns. Customer satisfaction scores or cleanliness ratings, collected via a "rate my experience" app, can provide near-real-time data into passenger sentiments. There are even video analytics capabilities now available that measure peoples' moods. A few new tools—and possibly a behavioral analyst to help process and interpret passenger data—can give operators all they need to create a segmentation strategy aimed at personalizing experiences.



# Don't fix what isn't broken

Much attention is rightfully being paid to innovating and improving the transit experience. But what's often lost in the discussion is the fact that transit users are quite satisfied with much of what their current public transportation service offers.

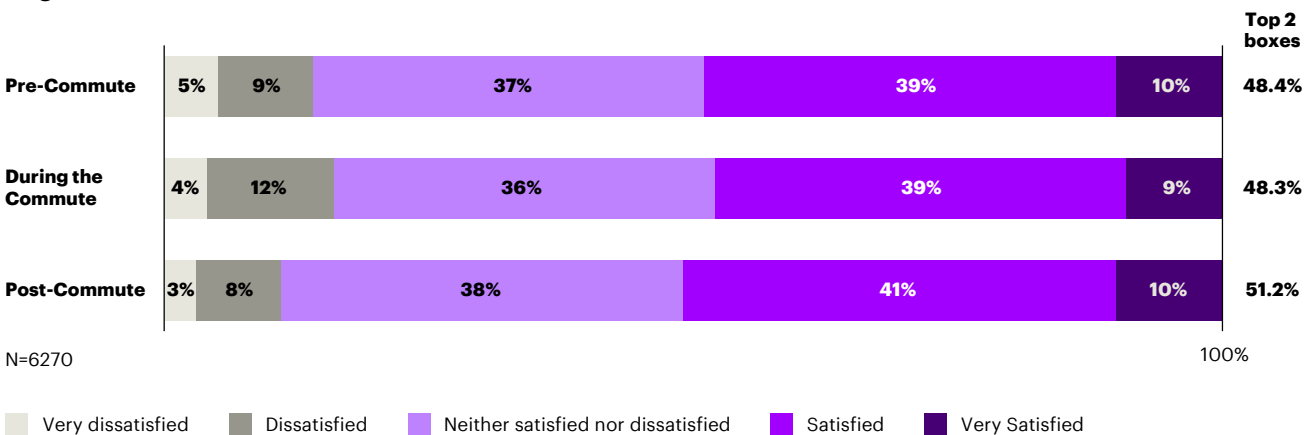
The number of dissatisfied passengers is quite low—with most dissatisfaction being registered during the commute. There are interesting demographic differences, however. Transit users in Singapore are most satisfied at every stage of their journeys; Tokyo users are the least satisfied. Passengers who are employed and have a household income of more than US\$100K are most satisfied in all stages. Millennials and commuters of all ages in Paris and Berlin are most disappointed with their pre-commute experiences.

Understanding these nuanced differences reinforces the importance of capturing granular passenger data and feedback. The more an operator understands about what pleases or displeases passengers, the more quickly and effectively they can act. What transit users want in one location may not be true in others.

For example, our research revealed a degree of consistency in passengers' primary pain points: Crowds at stations and annoying/disrespectful co-passengers. But it also revealed the technology interventions most desired by location. Wi-Fi-enabled coaches, contactless payments and electronic updates topped the list across the board. But Madrid passengers were quite interested in air quality monitoring at city stations. Paris transit users were more interested in seeing better accessibility for passengers with disabilities. Hong Kong passengers were more interested in coupons or travel incentives. And New York passengers were more interested in understanding what public transit operators do. Such regional insights can drive targeted actions.

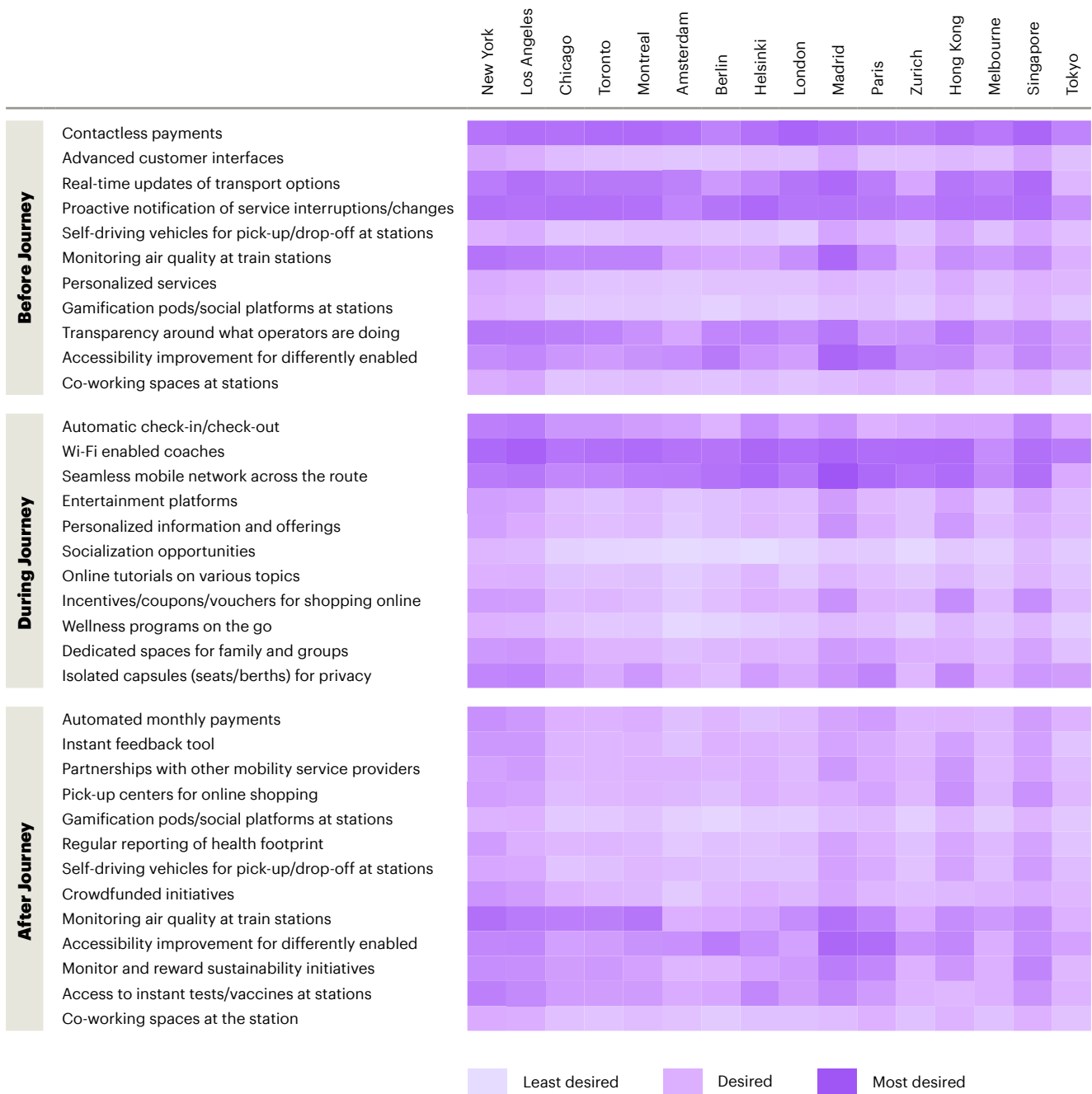
**37% of transit users are neither satisfied nor dissatisfied with transport services. This suggests a lack of engagement—and an opportunity to enhance services.**

**Figure 4. Approximately half of transit passengers are satisfied with current services**  
**Survey question: What is your overall satisfaction level with the current public transport services for the three stages below?**



**Figure 5. Accenture research has revealed what public transit passengers want—and what they don't**

**Survey question: What future measures or technology interventions are desired by you?**



“Transit agencies really need to focus on the quality of real-time information. Customers need to be informed with the highest quality of real-time information possible—and the most diverse range of information.”

Industry Expert, North America

## Invest differently to advance a purpose

With decreased revenues, public transit operators don't have extra cash on hand to invest in wholesale transformation of passenger experiences. The good news is that the vast majority of passengers (81%) do not expect radically different services from their transport operators. Also, many of the interventions that can make a difference—such as making sanitation processes visible or personalizing notifications—won't break the bank.

There are also opportunities to partner (and split costs) with other organizations such as rideshare providers, hospitality companies or online marketplaces to create more expansive and appealing passenger offerings.

When it comes to improving the passenger experience, the convenience of simplified ticketing or first-last mile connections will always play a role. But if COVID-19 has taught us one thing, it is that the concept of “passenger experience” is expanding to incorporate the manner in which an organization makes its purpose known.

Before transit operators make any decisions regarding changes to their passenger strategies, they should take this time of decreased demand to rethink their purpose. That purpose now undoubtedly extends beyond providing reliable, convenient transport services. It's about helping passengers achieve other goals of safety, security, sustainability, mental well-being and equality.

**“We do see that we need to move to the new normal. People are returning to normal, and we need to cater to changed behaviors.”**

**Industry Expert, Asia Pacific**





# Get passenger experiences back on track

Public transport agencies and operators can attract new and returning passengers by putting trust and experiences first. But how that trust is gained and how those experiences are perceived depend on the mindset of the passenger. One-size solutions no longer work. Perhaps they never did.

Different passenger segments are now emerging from a year or more of lockdowns and limited contact and travel. Their demands and expectations are different. So, too, must be the response of operators. A detailed understanding of passengers' values, sentiments and beliefs can help operators position themselves as partners to their users—not only in their travels from point A to point B, but in their journeys to wellness and a brighter future.

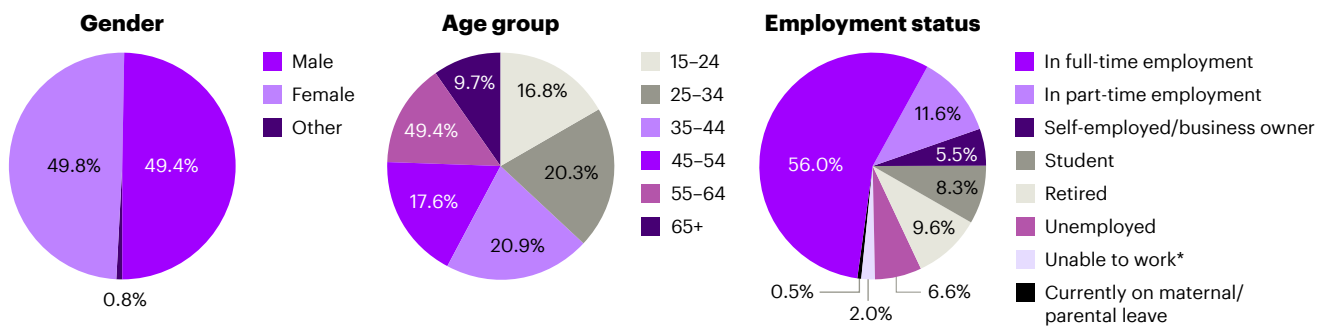
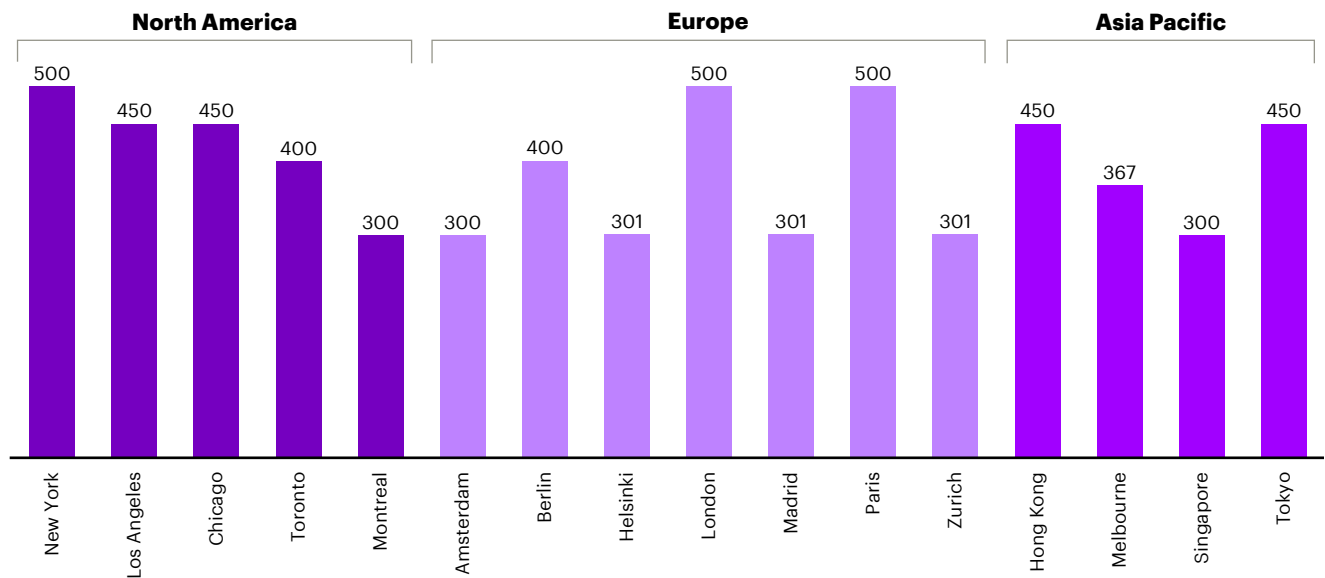
# About the research

In early 2021, Accenture’s global team launched an extensive study to gain a better understanding of public transit riders’ mindsets, preferences and behaviors.

The research comprised:

- A quantitative online survey of 6,270 transit passengers across 16 city clusters spanning Asia Pacific, Europe and North America. The survey targeted users of public transportation (buses, rail, metro, tram, subway and related modes) across gender, age, employment status and income level.
- Multiple qualitative focus group sessions with 17 participants from London, Singapore and New York.
- 10 validation interviews with urban mobility experts from multiple cities across Asia Pacific, Europe and North America.

## About the survey respondents



\*because of disability, health problems etc.

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