

Transit Value Index

A 2021 poll analyzing Americans' public transportation expectations and behaviors post-pandemic

74%

Used public transit at least 2 days a week before the pandemic

Whether it's commuting to work or school, conducting daily activities like grocery shopping, going to doctor's appointments and more, public transit has always been a lifeline for communities and helped Americans move freely.

However, the pandemic challenged public transit like never before.

Recent data from the [American Public Transportation Association](#) (APTA) showed that ridership dropped 79% in 2020 as compared to 2019. While these numbers are slowly recovering, the truth is that transit riders today are remarkably different from riders who took transit before COVID-19.

Today's riders need, want and demand different things from public transit. To understand these differences and their expectations for the future of transportation, we polled 1,200 working Americans (ages 18+) who currently use transit and/or regularly used transit before the pandemic. Overall, we found that transit riders are eager to get back on the road, but they're demanding changes from transit agencies to rebuild their confidence in using public vehicles.

74%

Want apps or tech features that improve the rider experience

46%

Want government investments in improving public transit

WHO

1,200 U.S. working adults
(ages 18+)

Respondents include those
that regularly use public transit
today or regularly used public
transit before the pandemic

Classified as "U.S. transit riders"

WHEN

July 2021

HOW

Online survey
conducted with
a mobile survey
platform

A Closer Look at
Evolving Rider Habits

Public transit is the most preferred transportation method.

However, usage will slightly decrease. Before the pandemic, nearly half of riders (46%) used public transportation more than ride hailing services, personal vehicles, or bikes and scooters. Post-pandemic roughly 2 in 5 (36%) prefer to use public transit, which is the highest of all transportation methods chosen.

65%

Have a transit stop within a 15-minute walk from their home

Convenience is the main reason Americans choose transit as their top transportation option. In fact, most riders say there is a public transit stop within a short walking distance of their home (65%), the grocery store (61%) and their workplace (56%).

Meanwhile, personal vehicles or carpooling will see the biggest increase (25%, as compared to 17% pre-pandemic) due to health concerns.

71%

Are concerned about catching an illness on transit

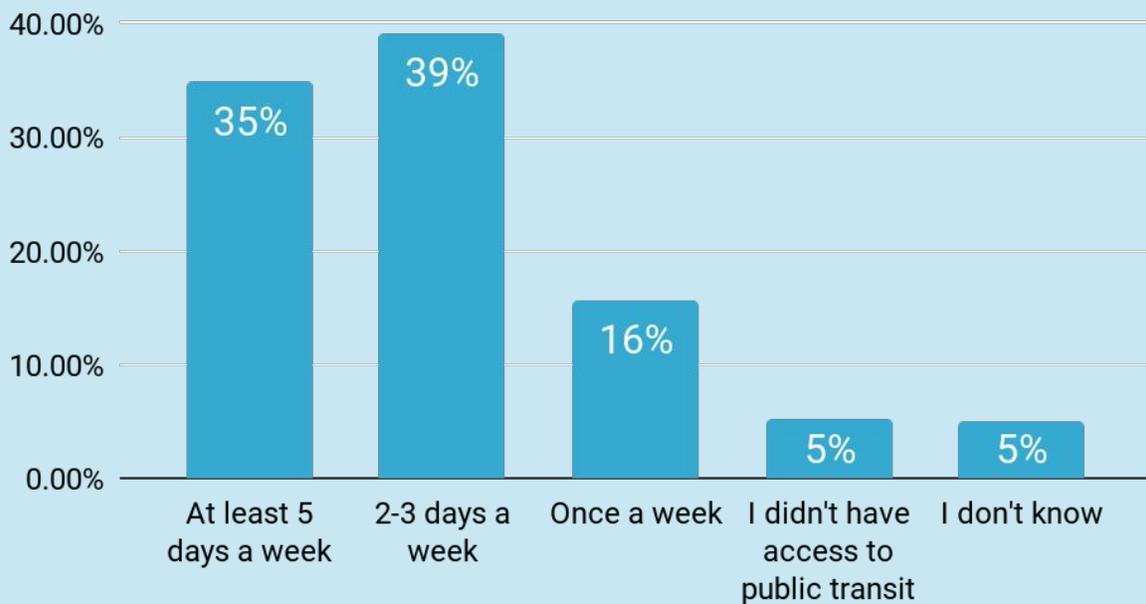
73%

Want more protocols to prevent overcrowding

73%

Want more cleanliness protocols

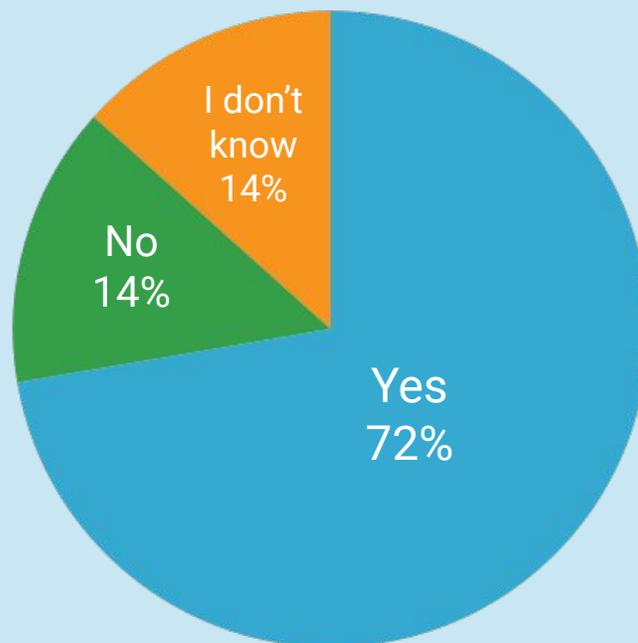
How often did you use public transportation before the pandemic?



Public transit was **a lifeline for working Americans.**

- Before the pandemic, nearly 2 in 5 (39%) U.S. transit riders used public transportation 2-3 days per week
- Another 1 in 3 (35%) used it at least five days per week
- A small portion (5%) did not have access to public transit before the pandemic

*Do you plan to use public transportation as frequently once your area is completely reopened?**

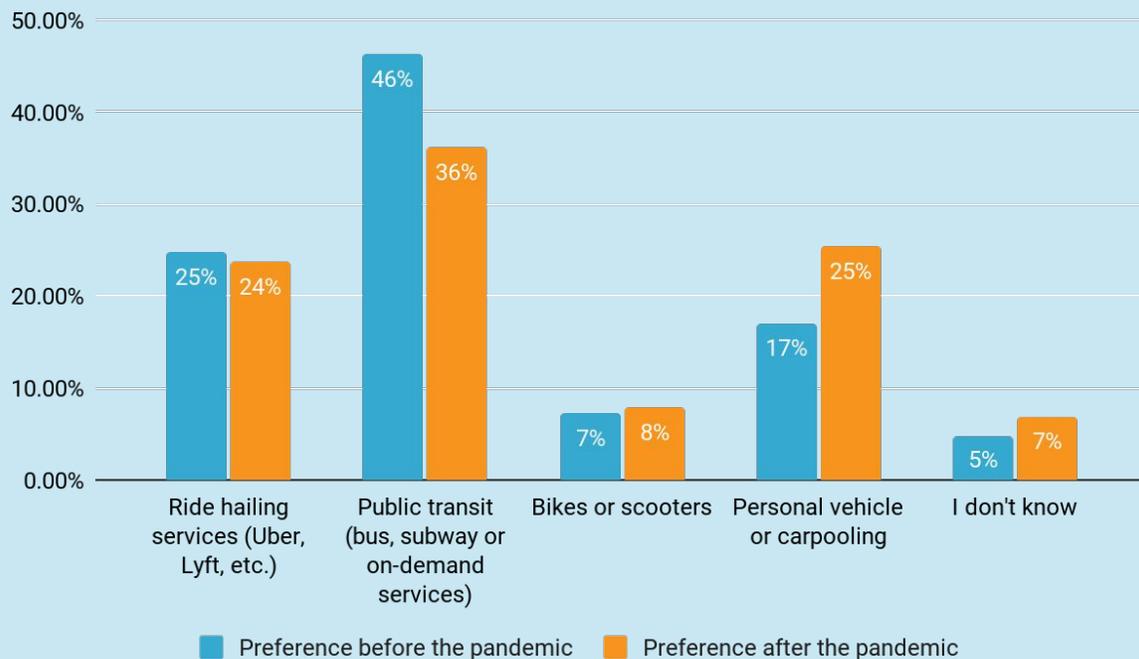


Transit services **will remain important** in workers' daily lives.

- Most Americans who regularly used public transit before the pandemic plan to use it just as frequently once their areas have reopened (72%)
- Lingering uncertainties around the post-pandemic world contribute to the 1 in 7 who won't use transit as frequently (14%) or simply don't know (14%)

*This question was only asked to respondents who use public transit at least once per week pre-pandemic.

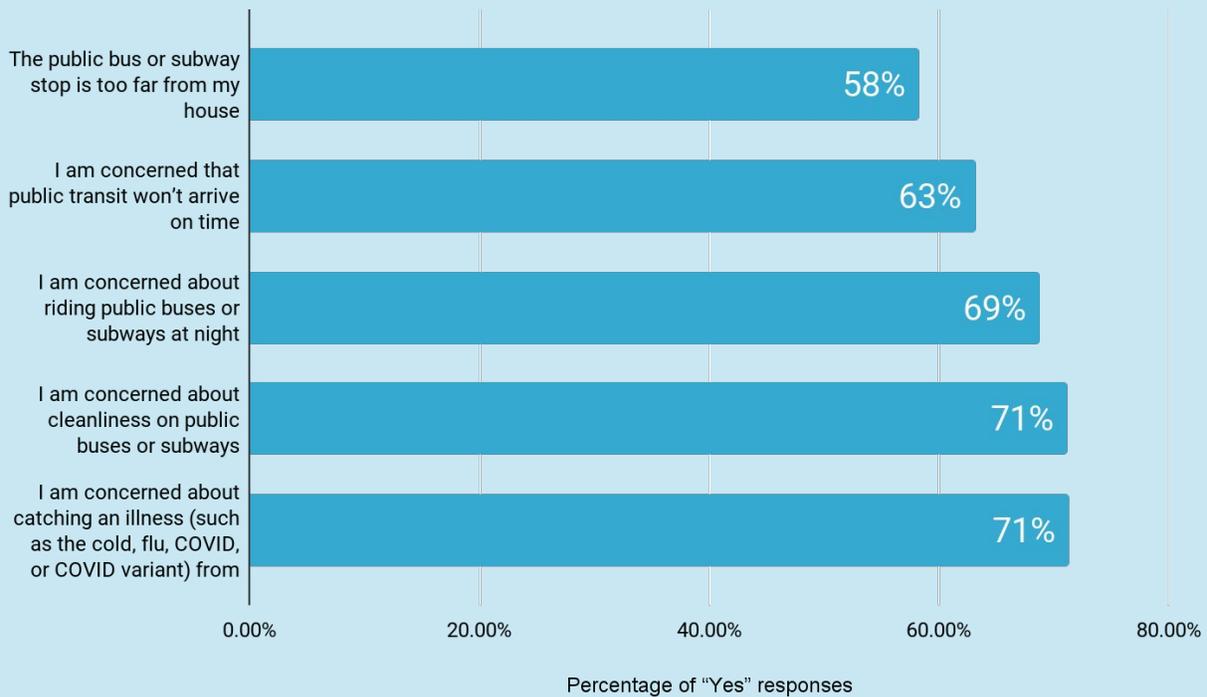
What type of transportation service did you use most in your everyday life before the pandemic, and what type do you plan to use most after the pandemic?



Public transit **rules transportation options** pre- & post-pandemic.

- Public transit was the most used transportation method before the pandemic (46%) and it will remain as such post-pandemic (36%)
- 1 in 4 (25%) say they'll use personal vehicles most often post-pandemic, which is an increase from 17% before the pandemic

Why do you primarily plan to use private transportation options, such as rideshare or a personal vehicle?

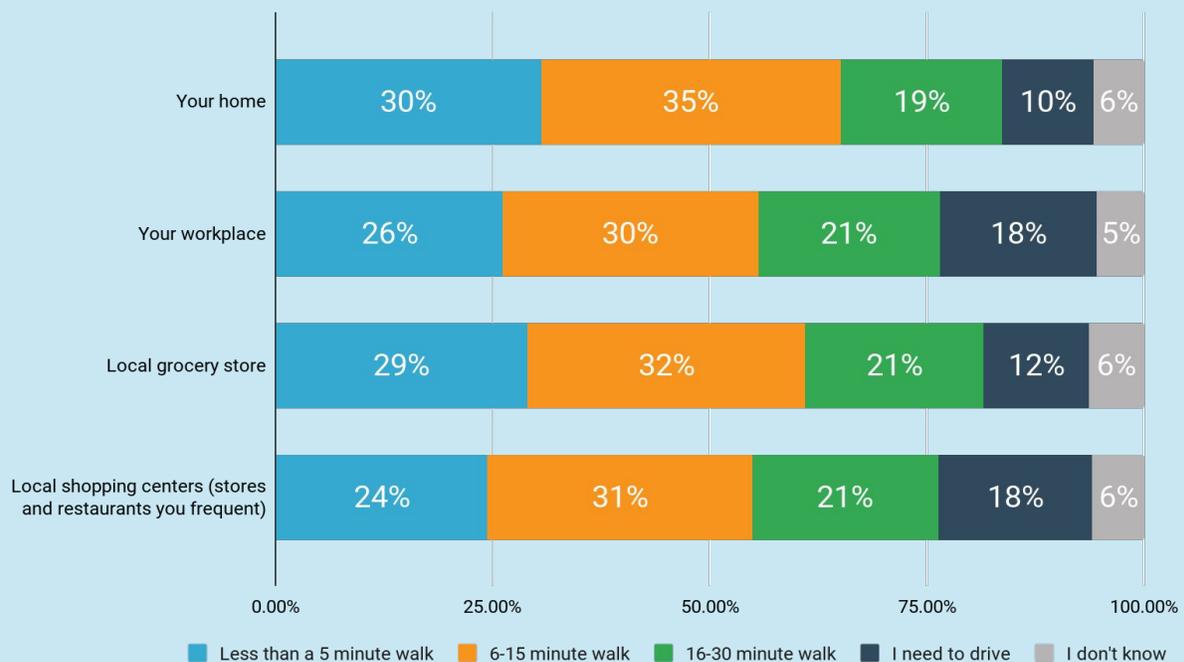


Health & safety concerns could push riders to [use private transportation](#).

- For respondents who expect to use personal vehicles, carpooling or ride hailing services post-pandemic, health is the number one reason with nearly three quarters (71%) concerned about cleanliness or catching an illness
- Safety on public transit is another top concern with 69% afraid to ride trains or buses at night

*This question was only asked to respondents who preferred ride hailing services or personal vehicle in the previous question.

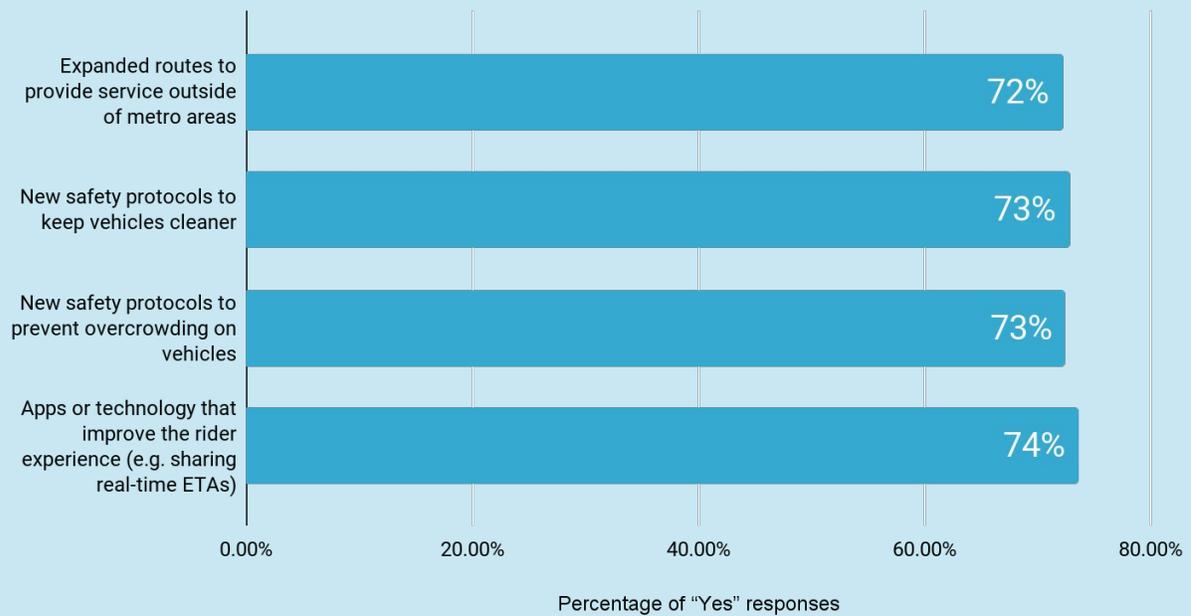
How close is the nearest public transit stop (bus or subway) from the following locations?



Transit stops are **within walking distance** for most riders.

- Public transit stops are within a 15-minute walk for 2 in 3 U.S. transit riders (65%)
- Nearly 1 in 5 transit riders (18%) need to drive to public transportation stops to get to work and local shopping centers

Would the following improvements or additional services push you to use your local transit system more frequently?



U.S. transit riders want *system and service upgrades*.

- The top improvement U.S. transit riders want to see are new apps or technology that make the rider experience better (74%)
- Not far behind on riders’ wish lists are new safety protocols to keep vehicles clean (73%) and prevent overcrowding (73%)

A Closer Look at
Transit's Role in the
Return to Work

Americans are ready to pick back up their daily commute.

Most U.S. riders have already started commuting to work (56%) or they have plans to do so in the next six months (23%) -- and they're not upset about it.

86%

Say commuting helps them decompress from work

65%

Enjoy their daily commute to work

76%

Say they catch up on email and social media while commuting

The daily commute, however, isn't a straight shot, and most U.S. riders have to take two (39%) or three (20%) modes of transportation to get from their home to their workplace. Employer incentives could push workers to rely on public transit more heavily.

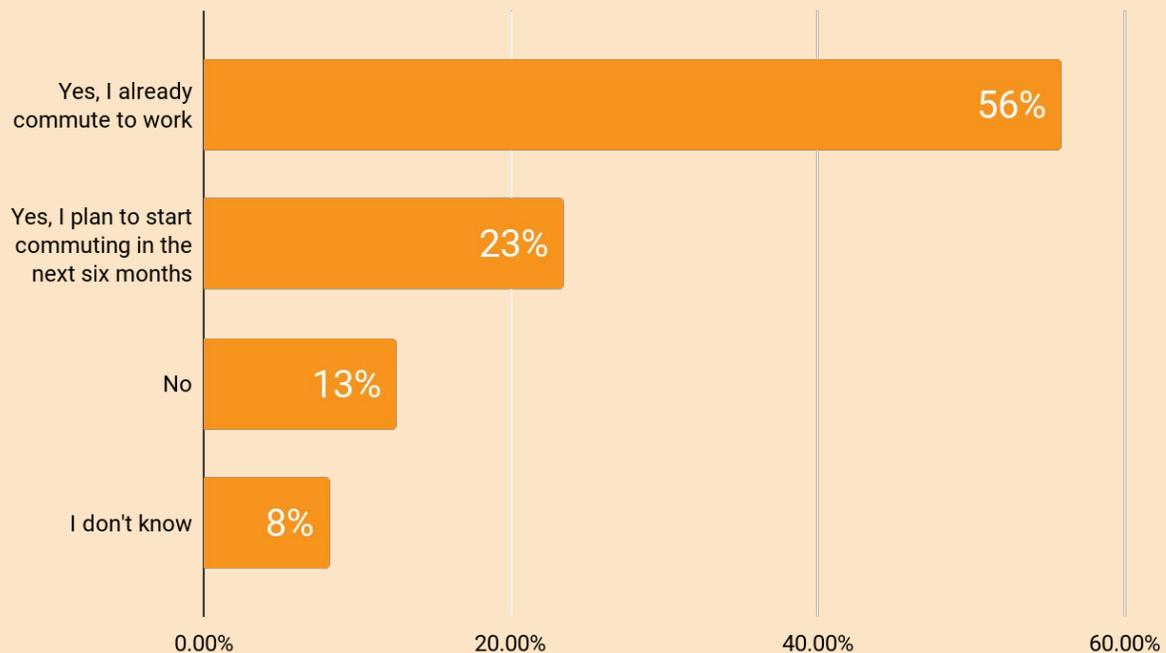
73%

Want employers to reimburse them for transit fares

69%

Would use on-demand services to ease the commute

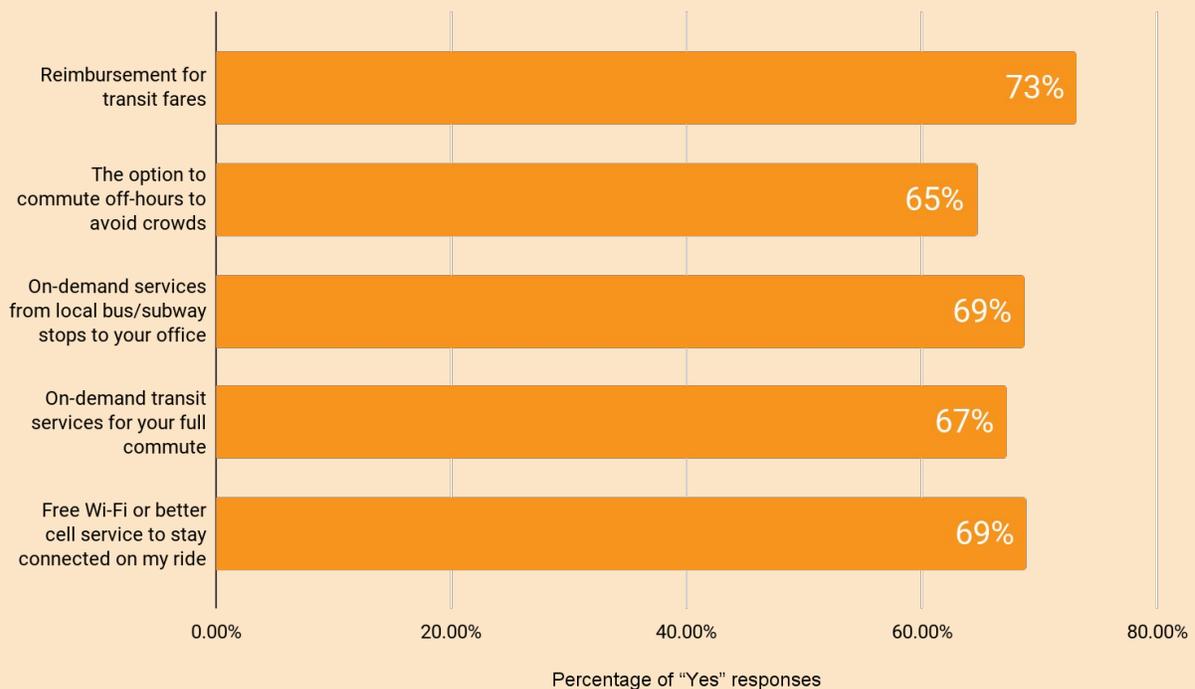
Do you currently commute to work or plan to start commuting to work in the next six months?



U.S. transit riders are **heading back to work**.

- More than half of U.S. riders (56%) are already commuting to work
- Another quarter (23%) plan to start back in six months
- Roughly 1 in 10 (13%) still do not have plans to commute to work

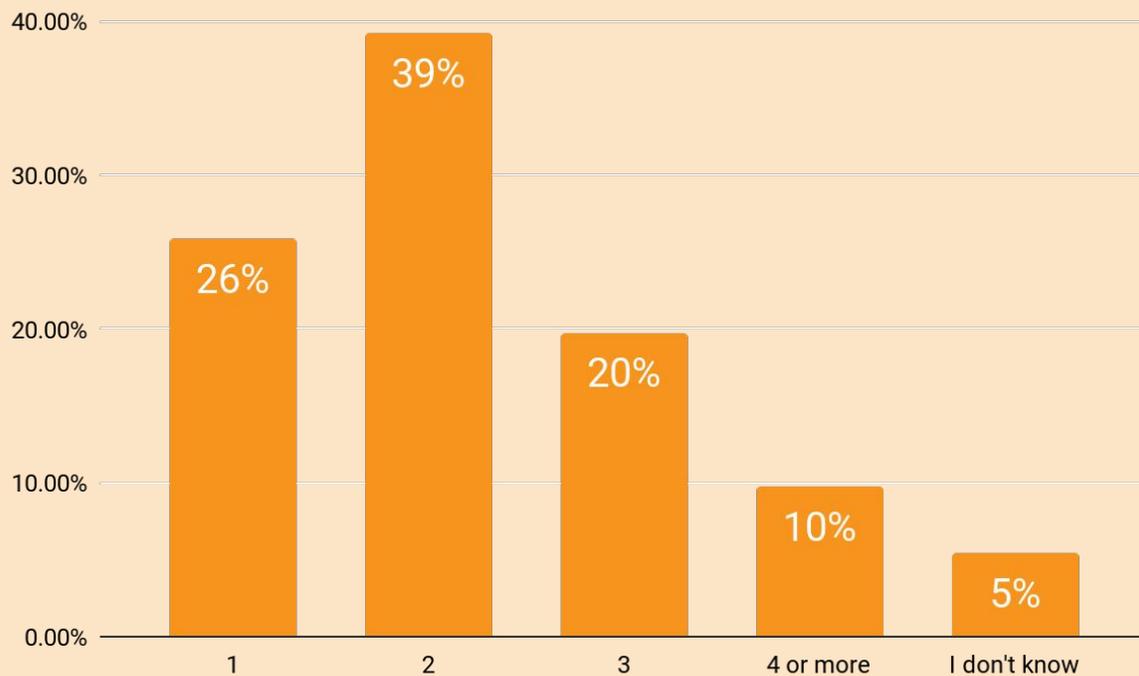
Of the following employer incentives, which would make you more likely to take public transit?



Workers want **financial and convenience incentives** from their employers.

- To get U.S. transit riders back on public buses and trains, three quarters want their employers to reimburse for fares (73%)
- On-demand services that ease the commute to the office (69%) and Wi-Fi or cell connectivity options (69%) are other top employer incentives

How many modes of transportation do you typically use to get from your house to work (including personal car, rideshare, trains, buses, scooters, bikes, ferry, walking)?



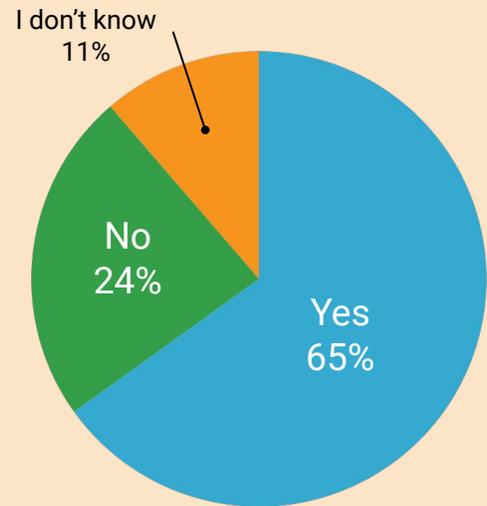
Transit riders take a **multi-modal journey** to work.

- 2 in 5 transit riders (39%) use two forms of transportation to get to work and another 1 in 5 (20%) use three
- 1 in 10 (10%) admit to using four or more modes of transportation - making for a long daily journey to work
- Meanwhile, 1 in 4 (26%) only require one transportation method to get to work

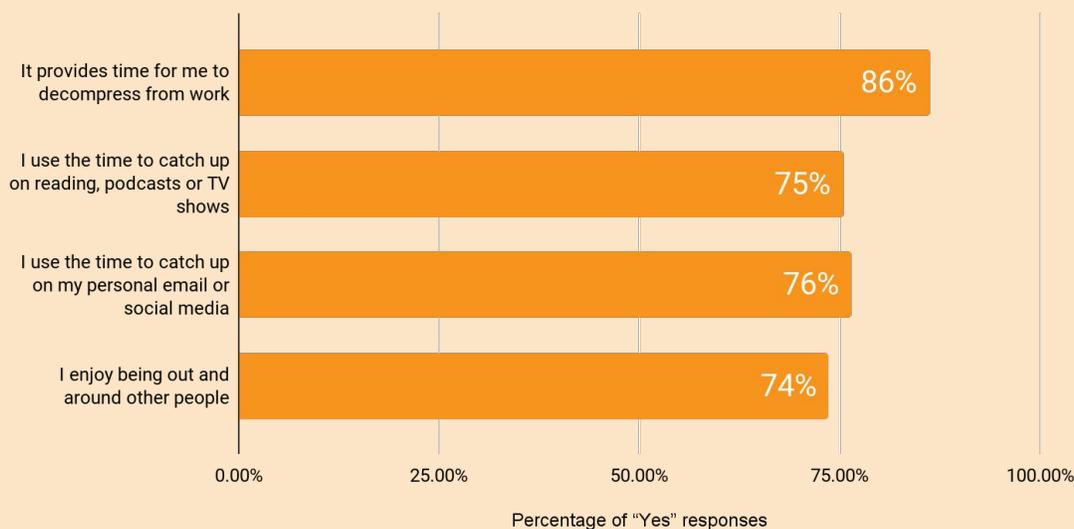
Do you currently enjoy your commute or are you looking forward to commuting to work again?

Transit riders **don't dread the daily commute.**

- Most (65%) enjoy commuting
- The main reasons why: it provides time to decompress from work (86%) and catch up on personal email or social media (76%)



Of those that admit to enjoying or looking forward to their commute, what are the reason(s) why?



A Closer Look at
The Future of Transit

Americans are ready to experiment with smarter, more efficient transit services.

Transit riders in 2021 care about sustainability, and they want transit agencies to prioritize upgrading systems to be more environmentally friendly. Within the next year, roughly half of transit riders think their local transit agencies should implement more sustainable practices (52%) and invest in electric vehicles (EVs) (45%).

56%

Say EVs will reduce carbon emissions

33%

Say EVs will create more sustainable communities

Self-driving vehicles (autonomous vehicles or AVs) may seem far-off to some, but U.S. transit riders are ready to go all in. Most would be willing to use an autonomous bus or shuttle if their local transit agency launched one tomorrow (71%).

60%

Say AVs will improve public transit services

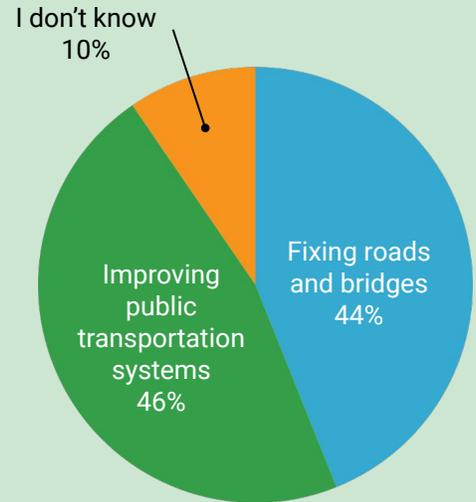
49%

Say AVs will help with vehicle timeliness

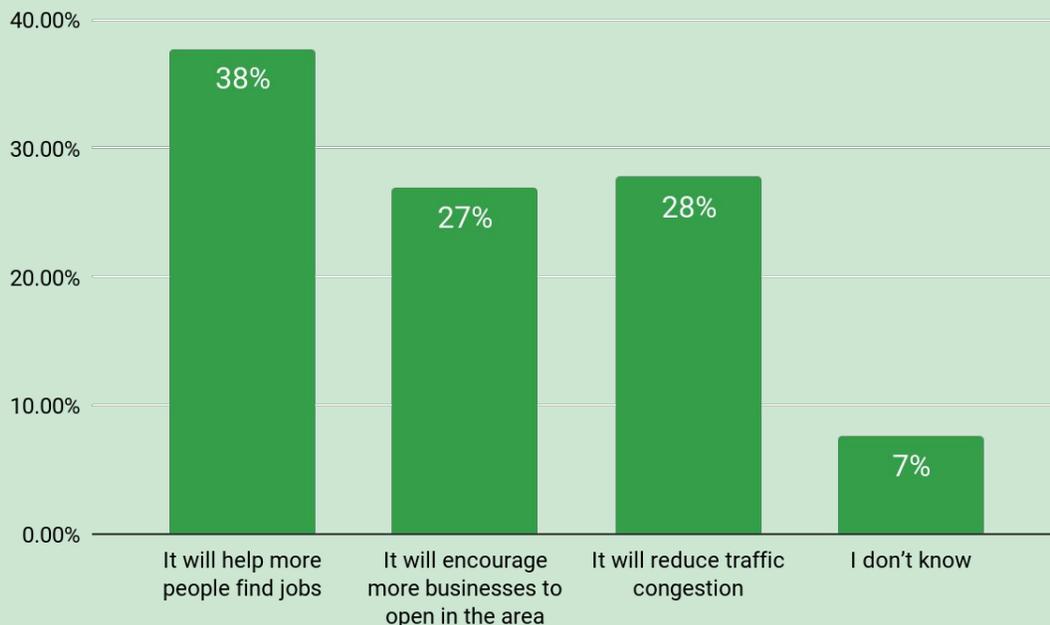
How do you think the U.S. government should prioritize funding for transportation?

Transit riders want investments in transportation.

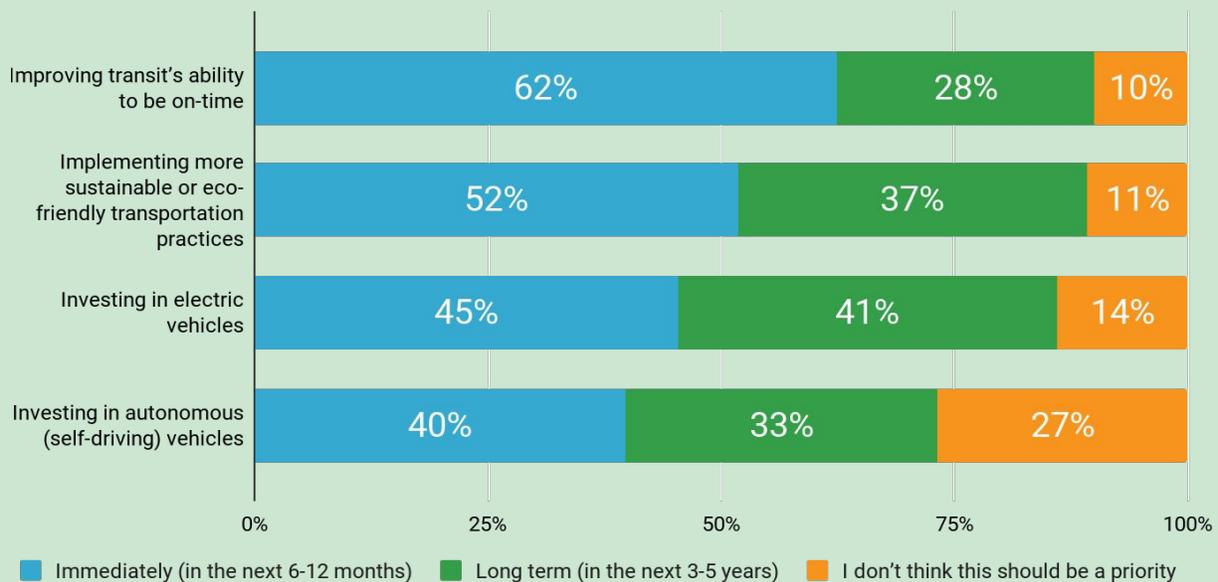
- Improving public transportation is slightly more of a priority to U.S. transit riders (46%) over fixing roads and bridges (44%)
- The biggest community benefit from public transit funding is that it will help more people find jobs (38%)



How do you believe funding for public transit will most impact your community?



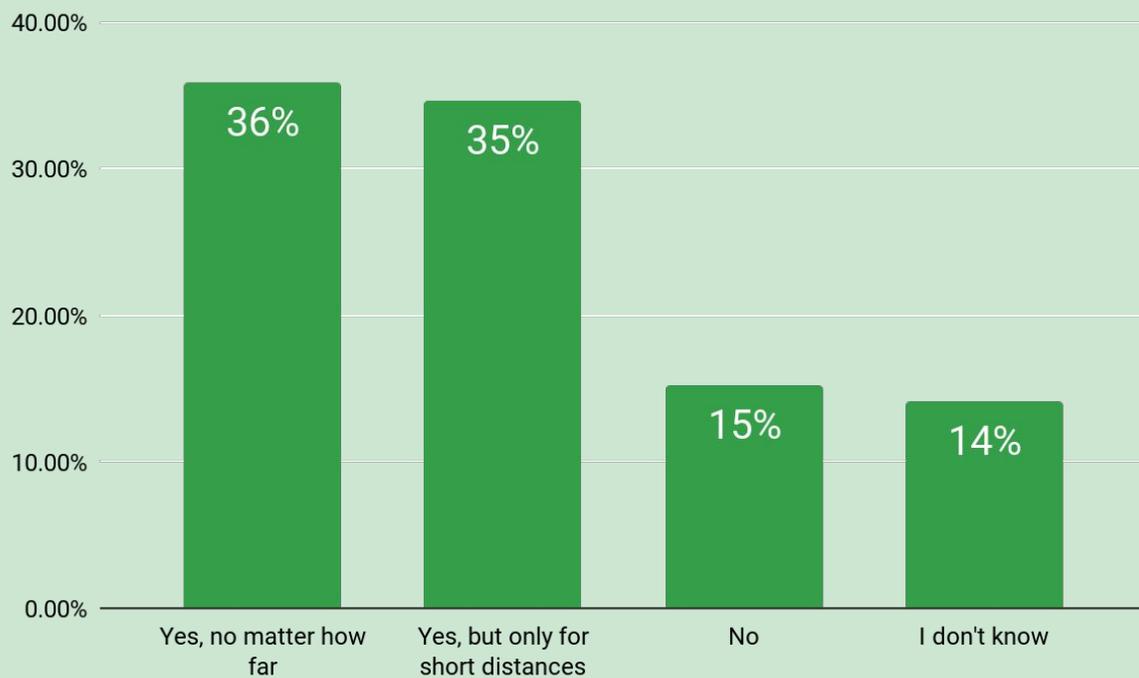
How do you think local public transit agencies should prioritize the following system upgrades?



Transit riders want **basic improvements, fast.**

- The biggest near-term demand for most U.S. transit riders is improving on-time performance (62%)
- Sustainable transportation practices are another key priority with half of riders wanting to see this immediately (52%) and another 37% wanting to see this in the long term
- Transit riders see the least value in autonomous vehicle investments with more than 1 in 4 (27%) saying this technology should not be a priority

If your local transit agency launched autonomous buses or shuttles tomorrow, would you use them to commute?



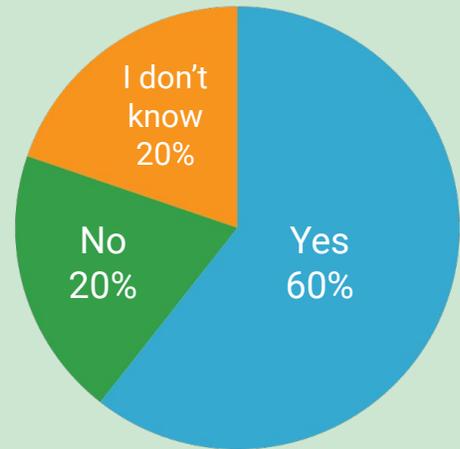
Transit riders are **ready to experiment** with self-driving vehicles.

- More than 1 in 3 are willing to use autonomous buses or shuttles for any distance (36%), while another 35% are only willing to ride them for short distances
- Meanwhile, 15% would not immediately use autonomous vehicles and 14% are uncertain

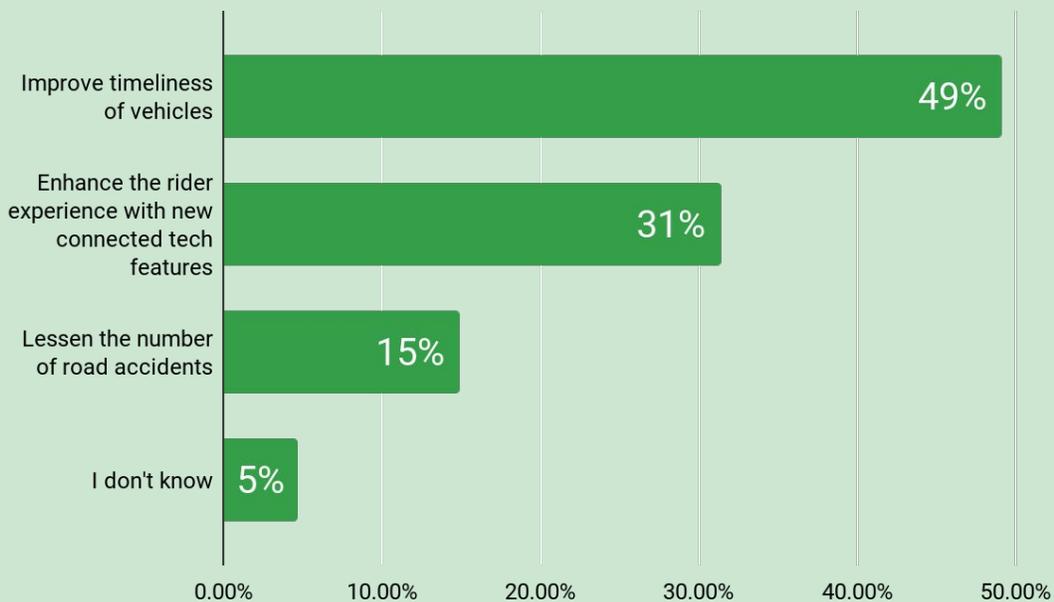
Do you think autonomous vehicles will improve public transit services?

Self-driving transit is expected to improve timeliness.

- Most transit riders (60%) believe AVs will improve public transit
- Of this group, half (49%) say autonomous tech will help public transit most with on-time performance
- Another 31% say the biggest benefit will be enhancing the rider experience



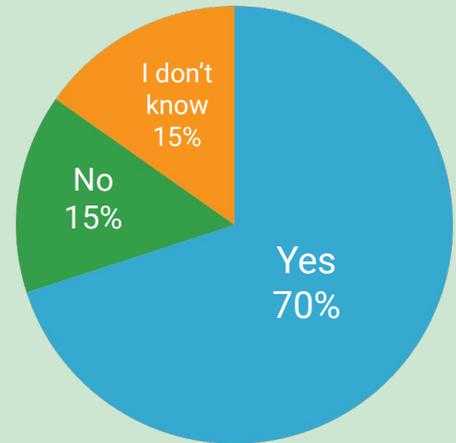
Of those that think AVs will improve public transit, what do you think will be the biggest benefit?



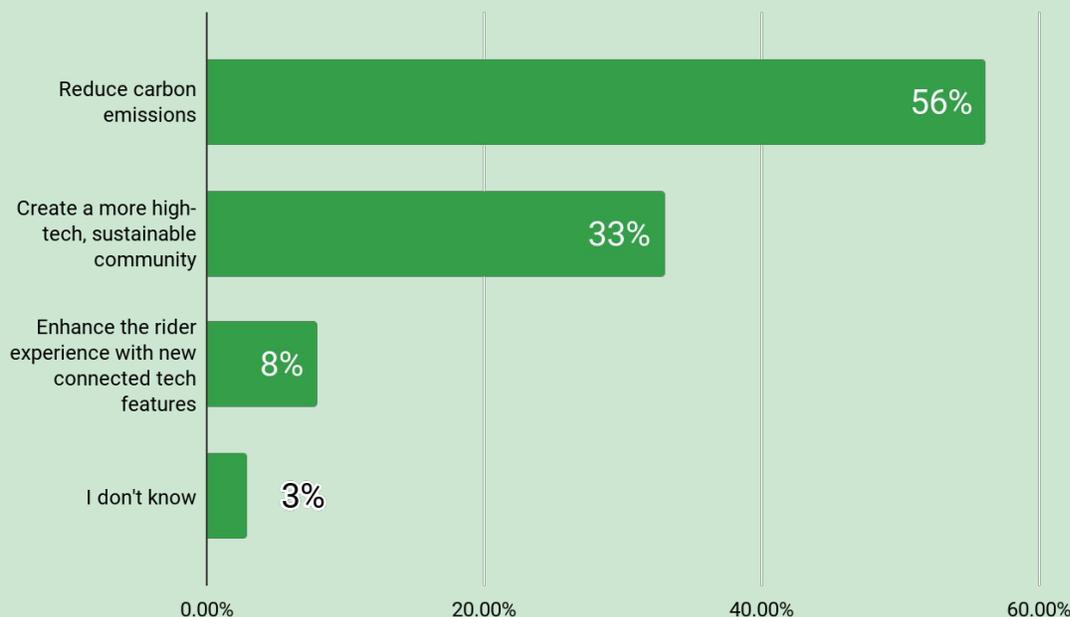
Do you think electric vehicles will improve public transit services?

Transit riders have higher hopes for electric vehicles.

- Nearly 3 in 4 believe EVs will improve public transit
- Of this group, 56% say this technology will reduce carbon emissions
- Another 1 in 3 (33%) say it will create a more sustainable community



Of those that think EVs will improve public transit, what do you think will be the biggest benefit?



A Final Word from
TransLoc CEO Brett
Wheatley

Public transit is the lifeline of American communities.



Whether it's commuting to work or school, conducting daily activities like grocery shopping, going to doctor's appointments and more, **Americans use transit on a daily basis to stay connected and move freely.** At TransLoc, we believe that freedom of mobility is a basic human right.

And while the pandemic challenged our right to move freely, it also pushed us to improve our transit systems because today's riders need, want and demand different things from public transit.

Our survey shows that riders want reliable transit that's convenient (and close by), safe and clean. Beyond those basic necessities, we also found that riders are interested in transit innovation, like electric vehicles, that makes each ride more environmentally friendly.

"And it's up to us to help agencies deliver on these demands."

Improving public transit is more important today than ever before. Our future has never been brighter, and **we look forward to continue serving our communities by making mobility efficient and accessible to all.** This is the heart of what we do.

Moving forward, we are also deeply committed to creating innovative solutions and building strategic partnerships that support riders' modern-day needs. We're excited to get America moving freely again.

Thank You!

For more information about this survey,
contact transloc@shiftcomm.com

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