



Swiftly

The State of Public Transit

// INDUSTRY REPORT 2020

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Executive Summary

As we move into the new decade, consumers have increasingly high expectations for seamless experiences in all areas of their lives, and transportation is no exception. Reliable public transit is more important than ever.

Transit ridership may have dipped in recent years, but there are strong signs that the transit industry can turn this around by adopting a 'rider experience' mindset. To that end, we surveyed nearly 100 transit professionals to understand how public transit operates today, areas of opportunity, and ways the industry can most dramatically improve the rider experience.

METHODOLOGY

Swiftly conducted an online survey of nearly 100 U.S. transit professionals across regions, departments, and roles. The survey ran from November 7 – December 1, 2019 and was filled out by a mix of Swiftly customers and non-customers.

What we heard

» one

EXECUTIVES LIST RELIABILITY AS THEIR TOP CONCERN.

Nearly a quarter of transit executives listed on-time performance as their top concern for 2020. And it's no wonder: 97% see a correlation between on-time performance and ridership.

» two

ACCURATE REAL-TIME INFORMATION IS SEEN AS A KEY TO IMPROVING RIDERSHIP.

Riders want to know if their bus is on time. And while 93% of executives believe that there's a correlation between accurate real-time information and ridership, respondents believe that, on average, their riders wouldn't give their prediction accuracy a passing grade.

» three

OPERATIONAL ISSUES ARE THE MAIN BLOCKER TO RELIABILITY.

Inefficiencies are a big obstacle to reliability: 54% of transit professionals say that operational issues are preventing a more reliable system.

» four

HIGH-FREQUENCY TRANSIT DOESN'T GET ENOUGH ATTENTION.

There's a direct causal relationship between frequency and ridership, but more than half of respondents don't track headways on high-frequency routes. Agencies looking to improve reliability can make a major impact by managing bunching and gapping on high-frequency routes.

» five

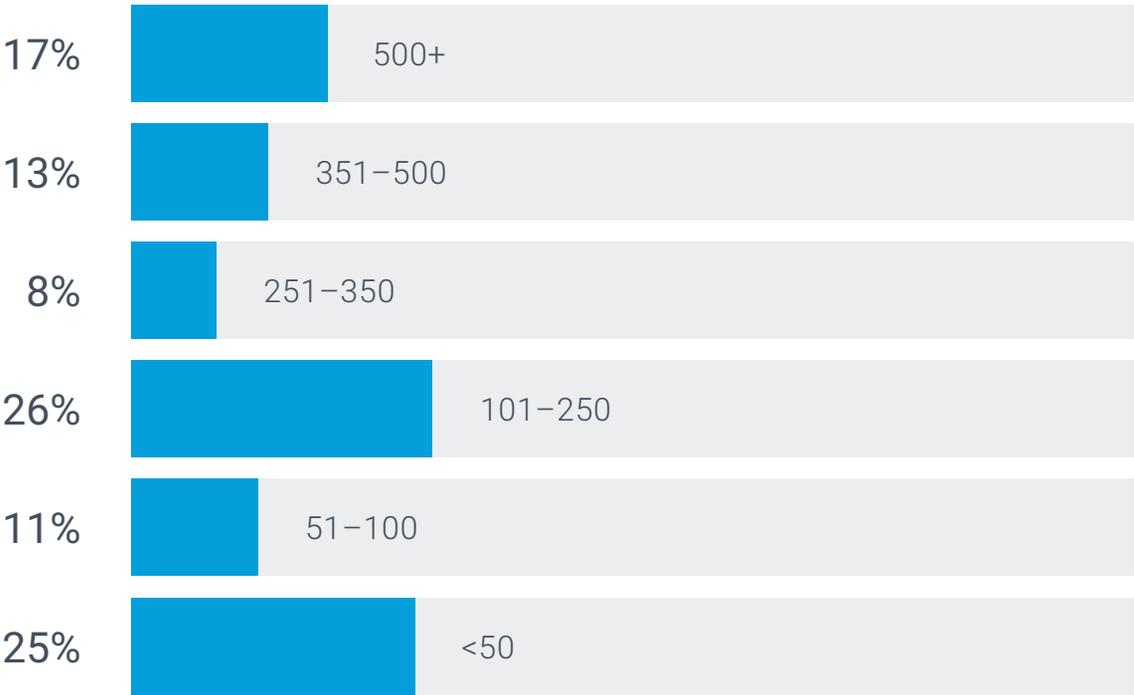
TRANSIT PROFESSIONALS ARE PASSIONATE ABOUT FIXING THE PROBLEM.

When asked why they chose to work in transit, most respondents had a noble or altruistic motive, like making their communities more accessible, improving economic mobility, or battling climate change. Transit professionals take that passion into the work they do every day, with many saying they'd give up their cars or even their beds to improve their agency.

Industry Challenges

Transit professionals filled out our survey from all over the country and from agencies of all different sizes.

NUMBER OF FIXED ROUTE BUSES IN THEIR SYSTEM:



Geography of the area they serve:



72%
primarily urban areas

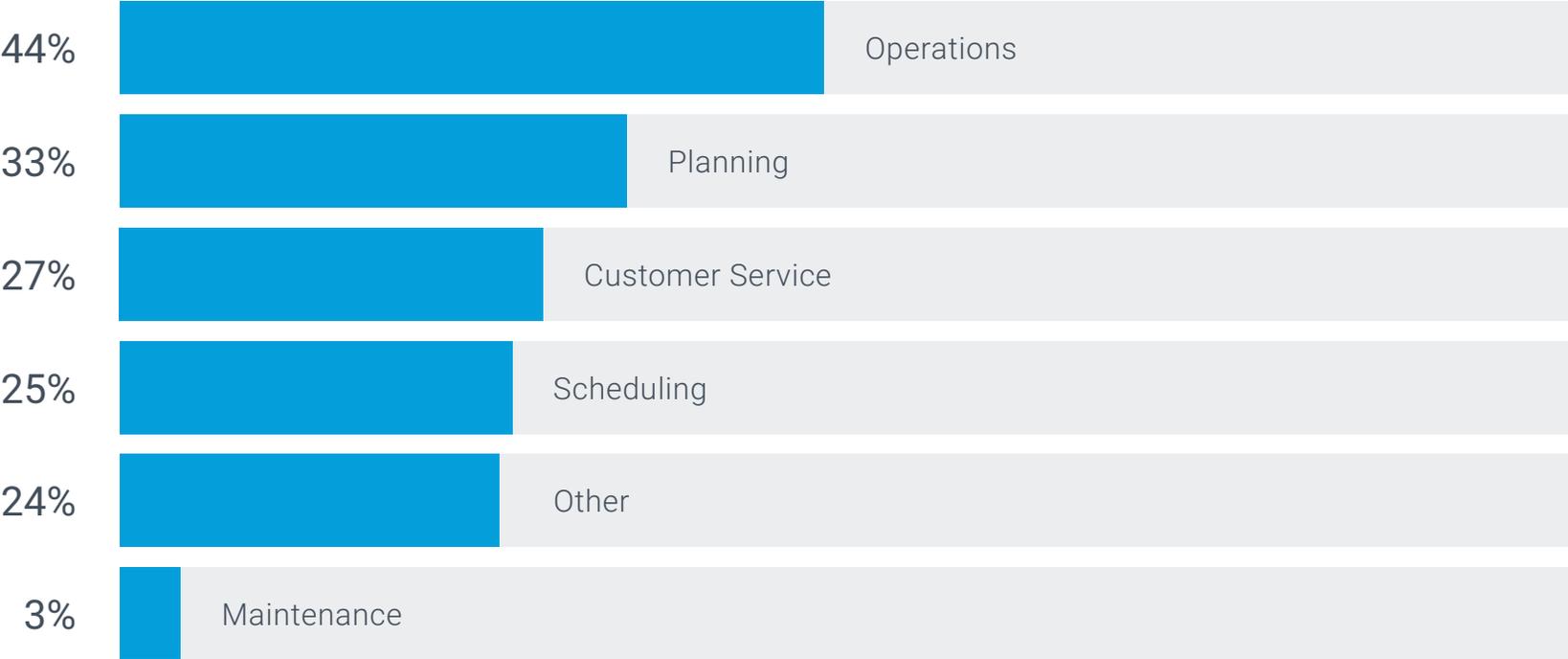


22%
primarily suburban



6%
primarily rural

FUNCTIONAL AREA/DEPARTMENT:



top job titles

- C-Suite
- Director
- Manager
- Service Supervisor
- Inspector
- Superintendent
- Planner
- Operations Specialist
- Analyst

Coming into the new decade, transit agencies are facing a lot of headwinds. Capital improvements and on-time performance are the areas of most concern.

IF YOU COULD WAVE A MAGIC WAND TO IMPROVE ONE ASPECT OF YOUR TRANSIT SERVICE, WHAT WOULD IT BE?

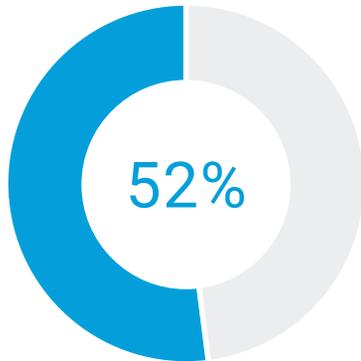


“Our agency needs to build more efficient lines that serve the community in the manner needed. We need two more rail lines and a BRT to enhance our current lines. The city would grow significantly more if the transit system was more robust.”

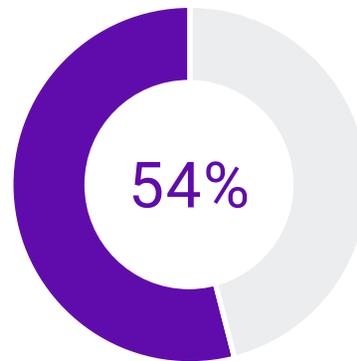
RECOMMENDATION »

It's important to have a clear, concise story about why capital improvements and on-time performance are important for your city and to communicate it to riders, elected officials, and business owners as often as possible. This will help **shift car-centric thinking to person-centric thinking.**

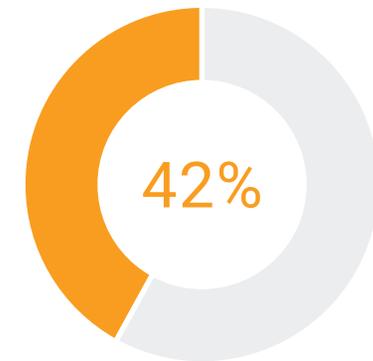
Budget, personnel, and operational issues are blockers.



find their budgets insufficient or wildly insufficient



say operational issues prevent more reliable service



rate personnel issues as a major blocker

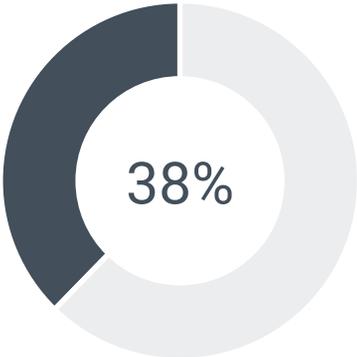
Congestion and variable traffic speeds ranked as leading factors creating operational issues. Complex scheduling software and operator shortages are also major contributors according to respondents.

RECOMMENDATION »

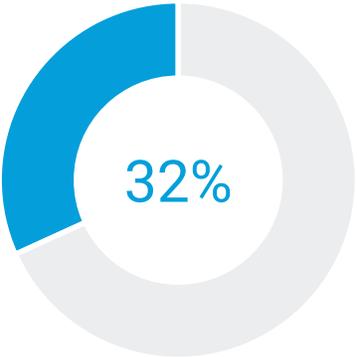
Congested streets will only continue to get worse without attractive alternatives. Even the most car-centric thinkers find it hard to disagree with this point, so it's a useful one when discussing funding.

But transit professionals are passionate about fixing the problem...

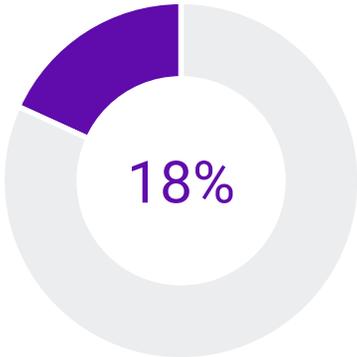
TRANSIT PROFESSIONALS WENT INTO TRANSIT TO MAKE THE WORLD A BETTER PLACE.



went into transit to make their community more accessible



went into transit to improve economic mobility in their community



went into transit to help battle climate change

...and are eager to improve ridership in their cities.

TO IMPROVE RIDERSHIP BY 10%...



51%

would give up their car for a year



54%

would live with their in-laws for 2 weeks



49%

would sleep on the floor for a month



27%

would eat a worm



23%

would get a root canal

“I went into transit because transit can shape urban planning and place-making.”

“I went into transit to provide compatible mobility options other than driving alone.”

They admire the good work of their peers.



“I admire Capital Metro in Austin. They have a gorgeous area to serve, manageable weather, and citizens ready to support. They also have talented staff who execute quality work.”



“I look up to Intercity Transit because they are about to embark on a five-year pilot program to provide free service. Every time I’ve brought up this idea, I was shot down and laughed at. But they stuck with it. Intercity Transit are looking to become trend-setters.”



“I find inspiration in the work MBTA is doing to improve data and improve customer communication tools.”

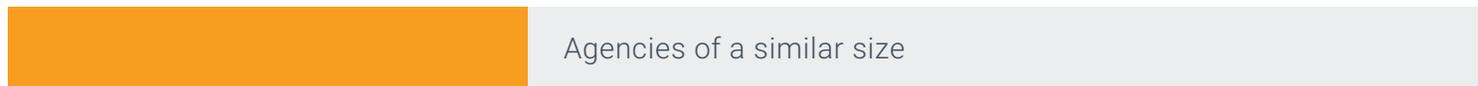
RECOMMENDATION »

It's helpful to establish an open line of communication with agencies with similar problems as yours. Chances are they've thought about the challenges you face and may have a fresh perspective.

Transit professionals also look to their peers for best practices.

WHO DO YOU CONSIDER YOUR PEERS?

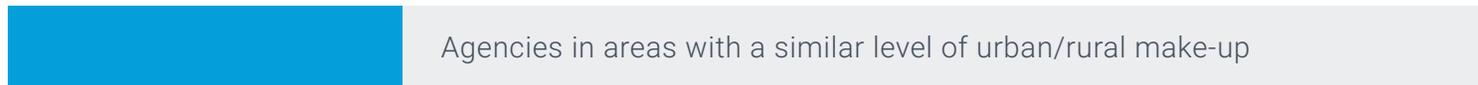
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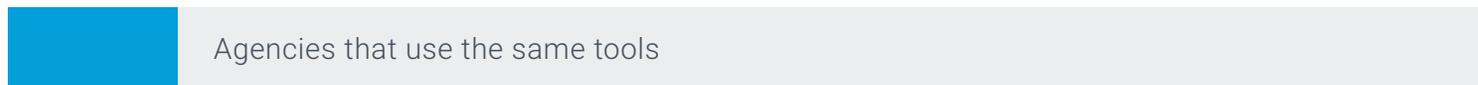
28%



25%



12%



RECOMMENDATION »

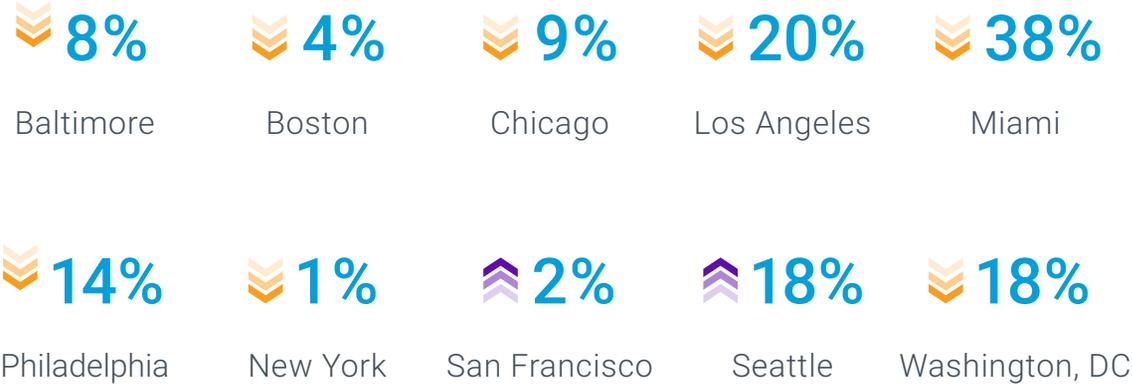
It's best to talk early and often with peer agencies about best practices in your area of expertise. Sharing information is one of the best ways to improve approaches to public transit nationwide.

Ridership, Reliability, and Rider Experience

Ridership has gone down in most places in the country.

CHANGE IN BUS & RAIL RIDERSHIP¹

From 2014 to 2018



"In order to implement effective policies, it may be necessary to reach beyond the bounds of the transit agencies themselves and partner with cities to consider strategies such as congestion pricing, or reallocating right-of-way on urban streets away from cars and to transit."

- UNIVERSITY OF KENTUCKY STUDY ²

¹ "Monthly Module Adjusted Data Release." National Transit Database, November 2019. <https://www.transit.dot.gov/ntd/data-product/monthly-module-adjusted-data-release>

² Graehler, Michael. "Understanding the Recent Transit Ridership Decline in Major US Cities: Service Cuts or 2 Emerging Modes?" University of Kentucky via Streetsblog, 2018.

Even transit folks themselves don't consistently take transit.



64% of transit professionals drive to work

25% of transit professionals take public transit



76% of transit professionals drive to run errands

7% of transit professionals take public transit

RECOMMENDATION »

Incentivize staff to ride transit! The best way to understand areas of improvement is to experience the advantages and shortcomings yourself.

Improvements to reliability are considered, almost universally, as one of the keys to fixing falling ridership.



97%

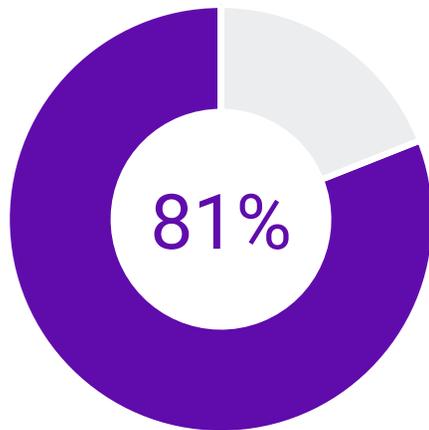
see a correlation between **ridership** and **on-time performance**.

KEY TAKEAWAY »

Reliability isn't only important for transit. Research shows¹ that consumers consistently emphasize the importance of reliability when purchasing products and services of all kinds.

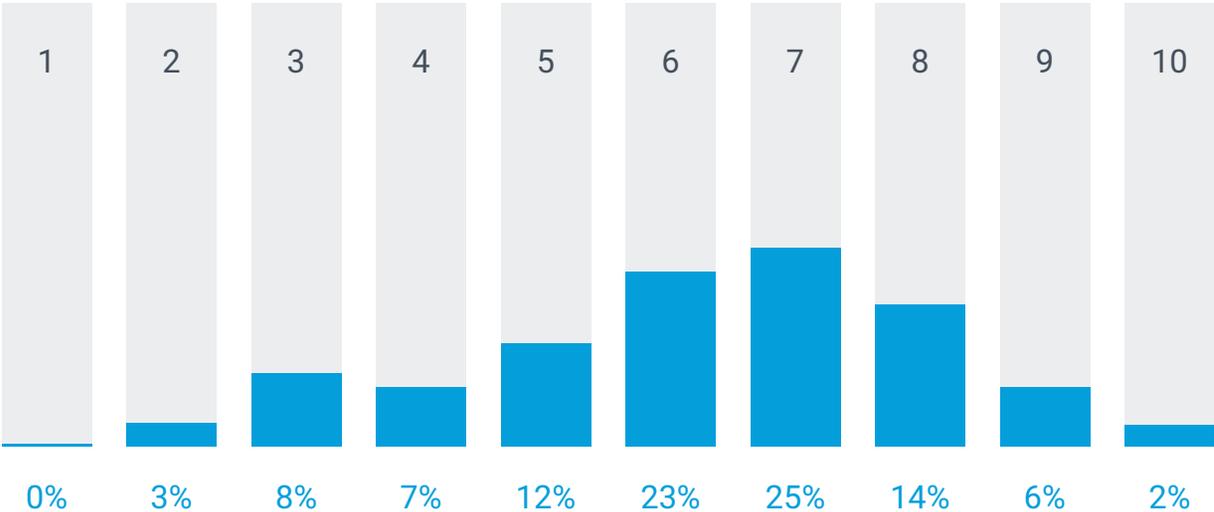
¹ "Consumer Perspectives on Longevity and Reliability: A National Study of Purchasing Factors Across Eighteen Product Categories," ScienceDirect, 2018.
<https://www.sciencedirect.com/science/article/pii/S2212827117309514>

And while most agencies track their reliability...



know their system-wide
on-time performance

...on average, they give themselves a D.



A recent TransitCenter study shows that nationwide, agencies' on-time performance usually ranges from 60% to 70%.¹

6.2/10 average self-rating of on-time performance

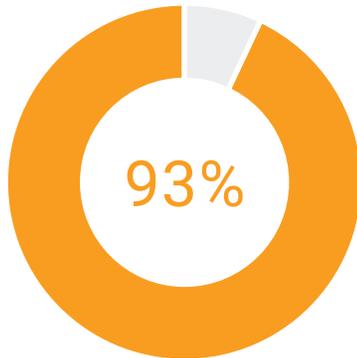
RECOMMENDATION »

While on-time performance is important for all routes, **high-ridership corridors** tend to affect the highest number of riders, so it's important to pay special attention to these routes.

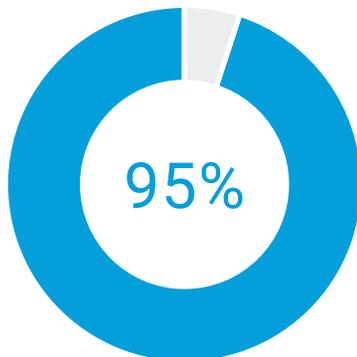


¹ "Your Bus Is On Time. What Does That Even Mean?" TransitCenter, Aug 27, 2018. <https://transitcenter.org/bus-time-even-mean/>

Moreover, accurate real-time information is seen as a key to improving ridership.



see a correlation between ridership and real-time prediction accuracy



provide real-time predictions for riders

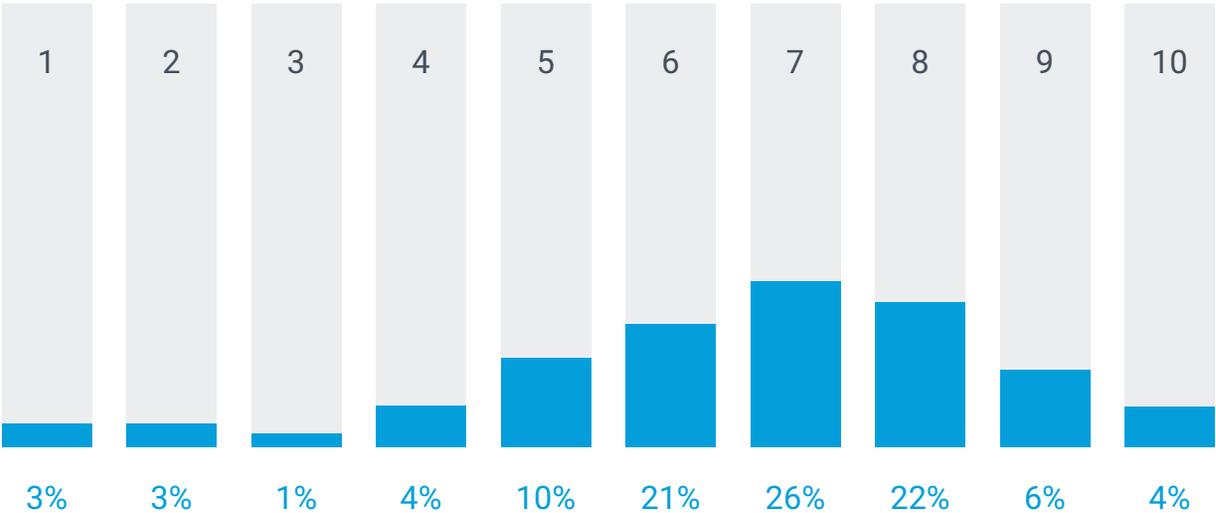


KEY TAKEAWAY »

Providing **accurate** real-time information is one of the best ways to improve rider perceptions of the reliability of your service on the whole.

Yet transit professionals believe their riders give them a D.

HOW DO YOU THINK YOUR CUSTOMERS WOULD RATE YOUR REAL-TIME PREDICTIONS?



6.6/10 average self-rating of on-time performance perceptions

“Our real-time info seems to be accurate but there are many unexplained anomalies and unassigned blocks.”

“Much of the time the predictions are accurate, but sometimes they are not or the predictions are missing, and many times the on-street signs do not work.”

KEY TAKEAWAY »

Improving **perceptions** of real-time information is often more important than improving on-time performance itself.

High-Frequency Transit

There's a direct causal relationship between frequency and ridership.

Every **1% improvement in frequency** results in a **0.4% increase in ridership**.¹

YET MOST AGENCIES AREN'T MANAGING HEADWAYS FOR HIGH-FREQUENCY ROUTES.



54%

don't track the headways of their high-frequency routes



12%

don't know if they're tracking high-frequency routes



34%

track the headways of their high-frequency routes

RECOMMENDATION »

You can't manage what you don't measure. It's best to be vigilant about **vehicle bunching and gapping**, which can ruin carefully planned headways, especially on high-frequency routes. You're paying for your high-frequency service, so be sure your riders get it!

¹ "Cross-Elasticities in Frequencies and Ridership for Urban Local Routes." Journal of Public Transportation, Vol. 19, No. 3, 2016. <https://scholarcommons.usf.edu/>

And even fewer agencies attach KPIs to high-frequency reliability.

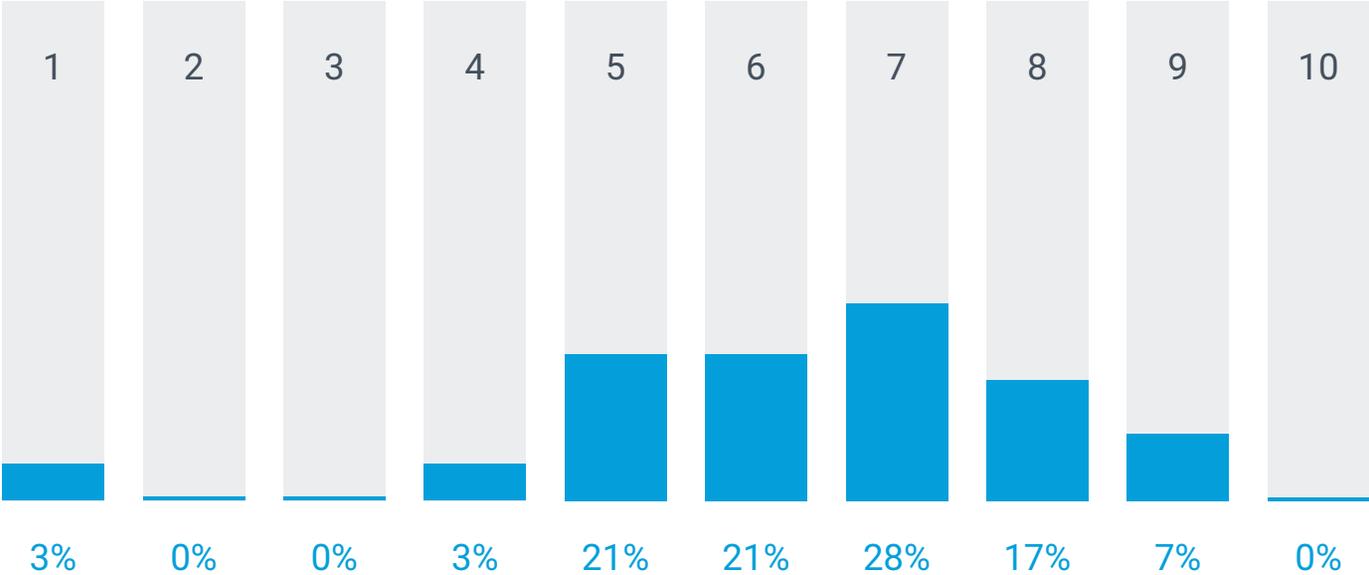


14%

attach KPIs to the **reliability** of their high-frequency service.



And it's affecting rider perceptions.



6.4/10 average self-rating of hi-fq reliability perceptions

KEY TAKEAWAY »

On high-frequency routes (every 15 minutes or less), 'show-up-and-go' riders typically care more about **consistent headways** than strict schedule adherence.

Looking Ahead



Speed, reliability, and frequency are the building blocks of any competitive transit system.

» Riders want fast transit.

Cities that have overhauled their transit and made it faster are seeing ridership increases.

“Places that are adding service, rethinking bus networks, and setting aside street space for buses are seeing it pay off in higher ridership,” TransitCenter told Streetsblog.¹

» Riders want reliable transit.

Most riders across the country list reliability as the most important area for improving bus service in 2019 and beyond.²

» Riders want frequent transit.

Data shows that frequency and ridership have a causal relationship. Increasing frequency by 1% will result in a 0.4% increase in ridership.³

¹ "Urban Transit Systems are Adding Riders (Mostly)" StreetsBlog USA, Oct 15, 2019. <https://usa.streetsblog.org/2019/10/15/urban-transit-systems-are-adding-riders-mostly/>

² "Who's On Board 2019 How to Win Back America's Transit Riders," TransitCenter, Feb 2019. https://transitcenter.org/wp-content/uploads/2019/02/TC_WhosOnBoard_Final_digital-1-1.pdf

³ "Cross-Elasticities in Frequencies and Ridership for Urban Local Routes." Journal of Public Transportation, Vol. 19, No. 3, 2016. <https://scholarcommons.usf.edu/>

The state of public transit is strengthening!

Heading into the new decade, we see a country reassessing its transportation needs. Car ownership is down, on-demand solutions are all but expected, and the “always on” economy is in full swing.

But where five years ago ride-hail apps were lauded as the be-all-end-all solution to transportation, today a more sober view prevails: ride-hail prices have risen, and research is mounting about their impact on urban congestion. Interest in high-occupancy solutions is making a rebound.

As we enter the 2020s, we see three strong trends that define the state of public transit today:

» **There’s an appetite for fast, reliable, and frequent transit.**

Ridership is going down in many places, but not everywhere. It’s less about the availability of newer mobility options and more about getting from A to B quickly and reliably.

» **High-frequency service is under-measured, under-appreciated.**

There’s a *causal* relationship between frequency and ridership. Agencies are missing an opportunity to provide riders what they want by not measuring high-frequency headways.

» **Good data will change rider perceptions.**

Improving perceptions of reliability is almost as important as improving reliability itself. Perceptions of real-time information and on-time performance only improve when the underlying data is consistent and accurate.

Underlying the shifting attitudes about transportation is strong, undeniable evidence of one unifying theme: that public transit is the backbone of urban mobility — and will continue to be so through the ‘20s and beyond.

And now for our outro music.

WHAT'S THE TRANSIT INDUSTRY'S FAVORITE TRANSPORTATION-THEMED SONG?





Swiftly

Swiftly is a transit reliability platform that helps public transportation become a fast, frequent, and attractive alternative to the private vehicle. More than 60 cities and 2,500 transit professionals use Swiftly to improve transportation for over 1.2 billion passenger trips per year.

Want to see how Swiftly could improve reliability at your agency?

Schedule a demo at sales@goswift.ly today.