

2021 Mobility Outlook

A snapshot of budgets, pandemic impacts and procurement expectations for the year ahead.

Staff report

This past year was tough for several reasons. Impacts from the global pandemic that spread not only a virus but fear and doubt across cities and industries are expected to extend through 2021. However, there are a few bright spots as highlighted by *Mass Transit's* annual survey. While nearly half of transit agency respondents believe there will be a permanent reduction in ridership, those same respondents believe the industry is moving in a more connected, more contactless and rider-focused direction.

Nearly 55 percent of transit respondents report operating and capital budgets that are anticipated to be flat or higher than 2020. Small urban area and rural operators were more likely to report budgets that were higher than 2020. Additionally, the cost-cutting measure reported with the most frequency among transit and private company respondents was leaving unfilled positions vacant. Overall, employee furloughs were only reported among 14 percent of transit respondents, but a higher percentage (22 percent) was reported from respondents at agencies operating in large urban areas.

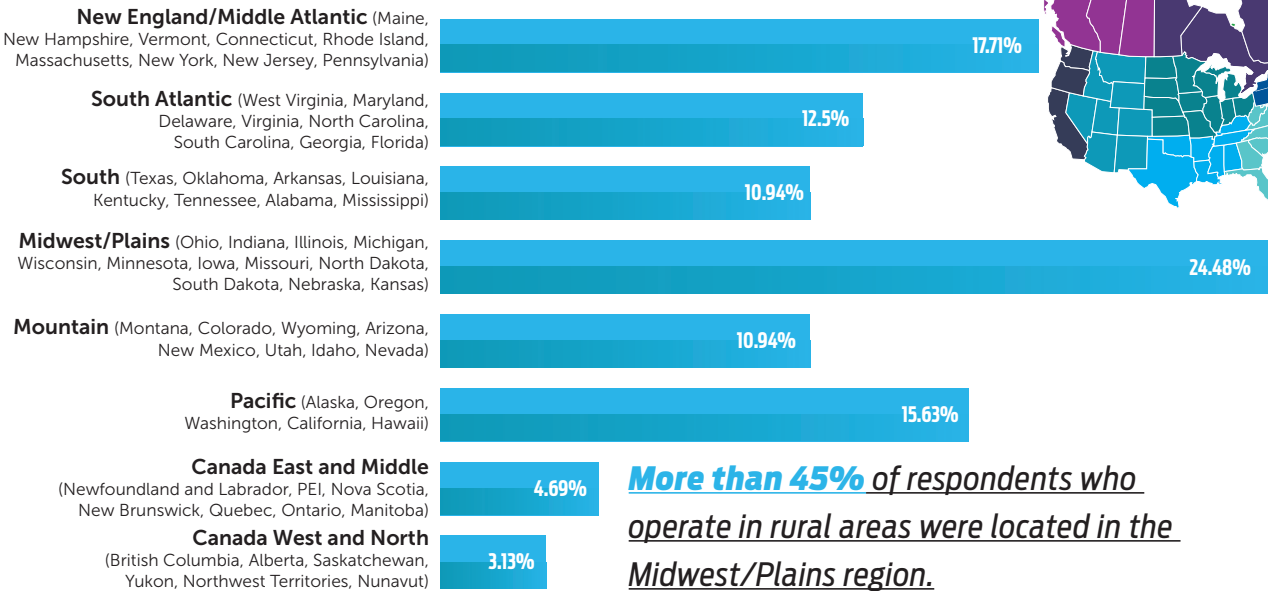
HOW WAS THIS INFORMATION GATHERED?

Mass Transit queried our transit agency subscribers, as well as representatives from private companies throughout December 2020 and the first week of January 2021. The survey asked about everything from budgets, COVID-19 impacts, State of Good Repair, procurement plans and much more.

While it is not possible to ask every question of every provider, we believe the data found within this survey offers valuable insight to mobility providers and the industry that supports these providers.

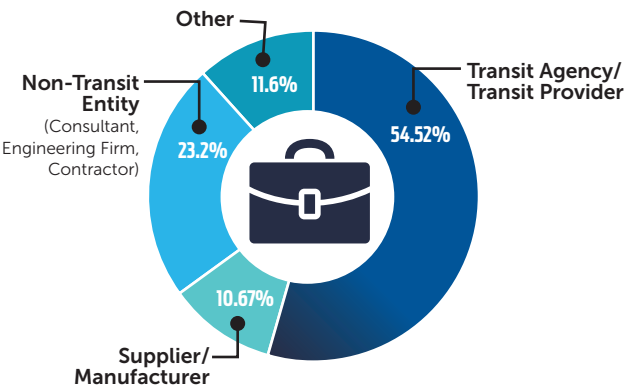
DEMOGRAPHICS: GEOGRAPHIC, SIZE AND SERVICES OFFERED

Where responding agencies are located



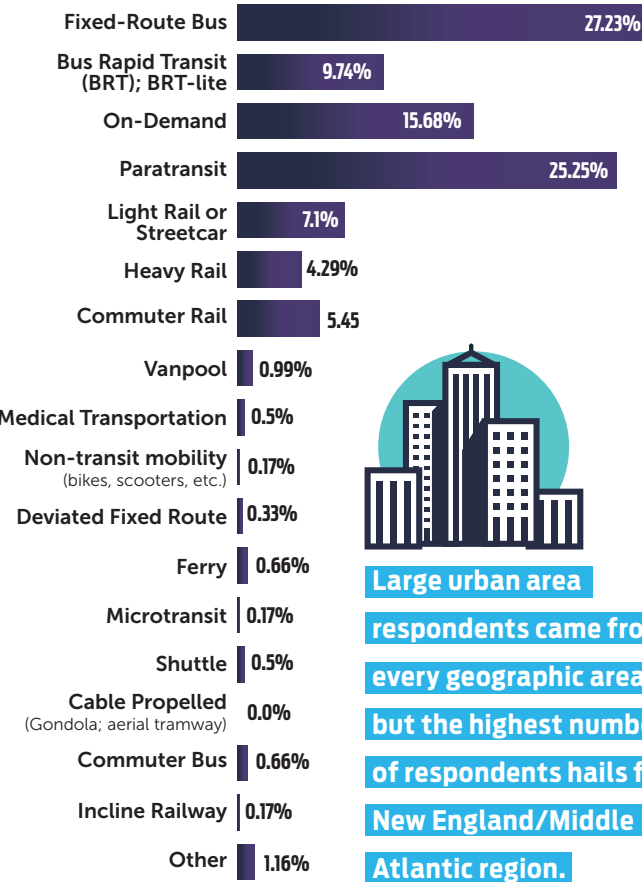
More than 45% of respondents who operate in rural areas were located in the Midwest/Plains region.

For which type of entity do you work?

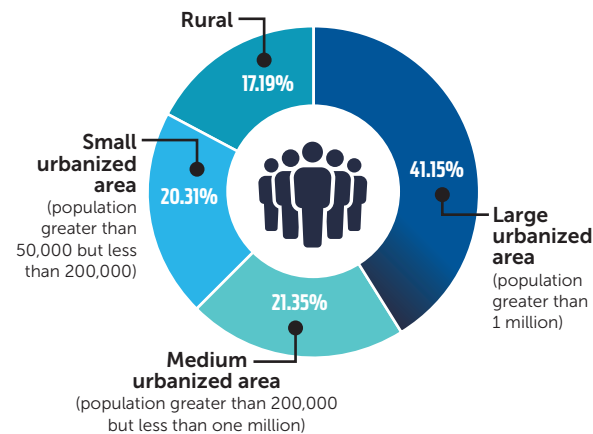


What services does your agency provide?

(select all that apply)



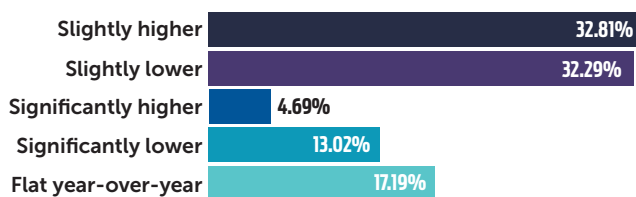
What is the population of your service area?



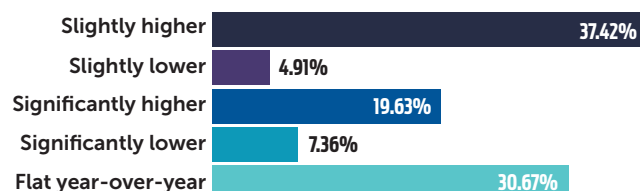
Large urban area respondents came from every geographic area, but the highest number of respondents hails from New England/Middle Atlantic region.

BUDGETS: 2021 BUDGETS COMPARED TO 2020

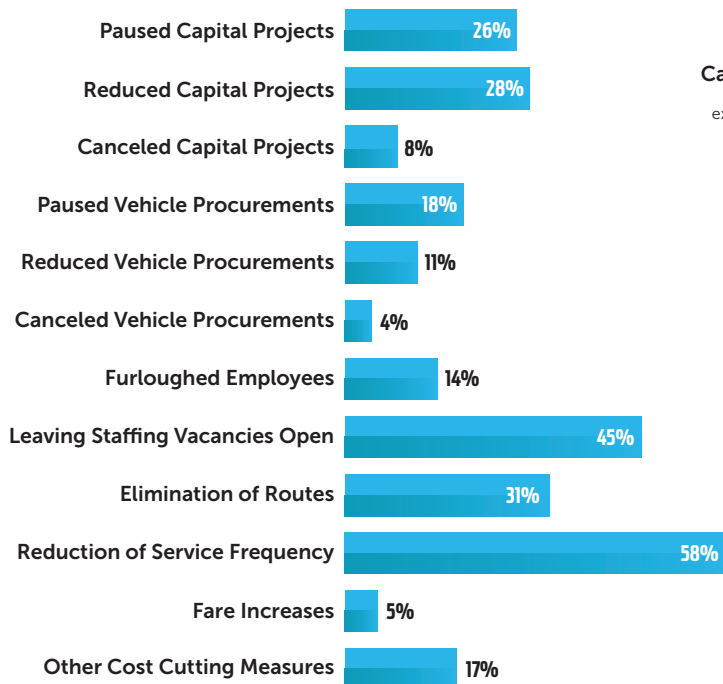
How does your anticipated 2021 budget, both operating and capital, compare to 2020?



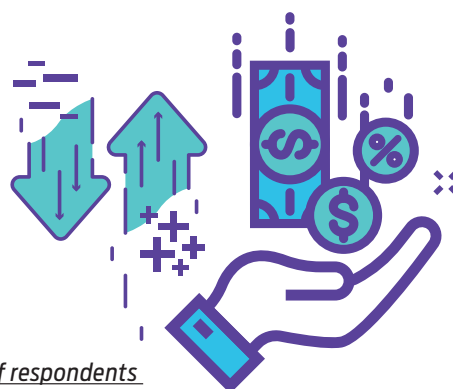
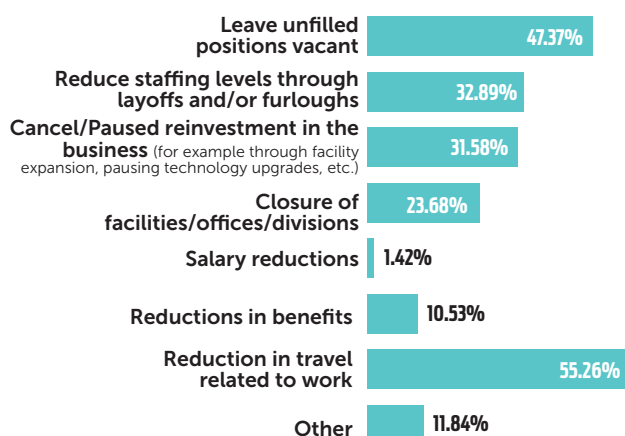
Private companies: How does your anticipated 2021 budget, both operating and capital, compare to 2020?



How has the pandemic impacted your agency's plans for 2021?



Private companies: Where will cost savings be realized?



More than 21% of respondents operating in large urban areas report 2021 budgets that are significantly lower.

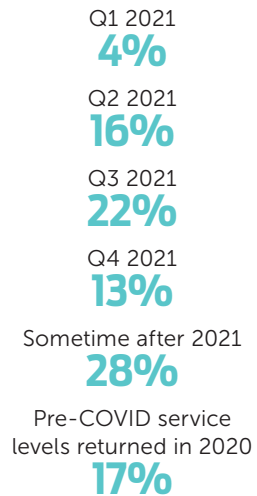
More than 51% of respondents operating in rural areas report 2021 budgets that are slightly higher.

More than 10% of respondents operating in small urban areas report 2021 budgets that are significantly higher.

More than 40% of respondents operate systems in medium or small urban areas; however, none of these respondents report having to cancel vehicle procurements in 2021.

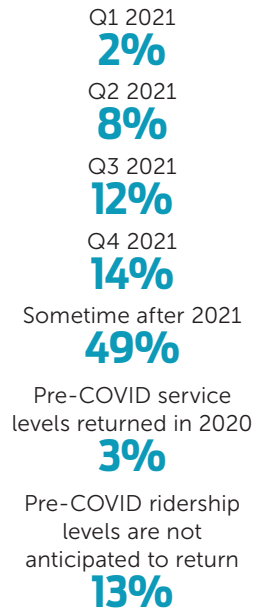
Respondents from large urban areas report a higher percentage of capital projects that have been paused or reduced in 2021, while rural area respondents report a higher percentage of vehicle procurements that have been paused, reduced or canceled.

When does your agency anticipate returning to pre-COVID levels of service?



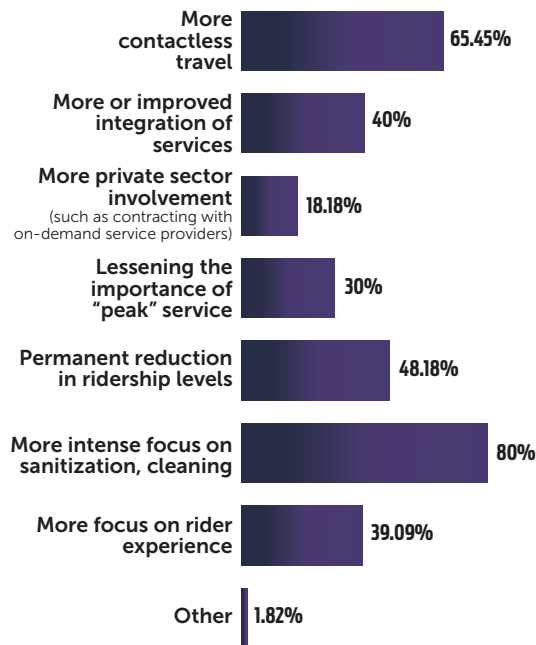
*Percentage represents rounded value of all answers within a category; total will not add to 100

When does your agency anticipate returning to pre-COVID levels of ridership?



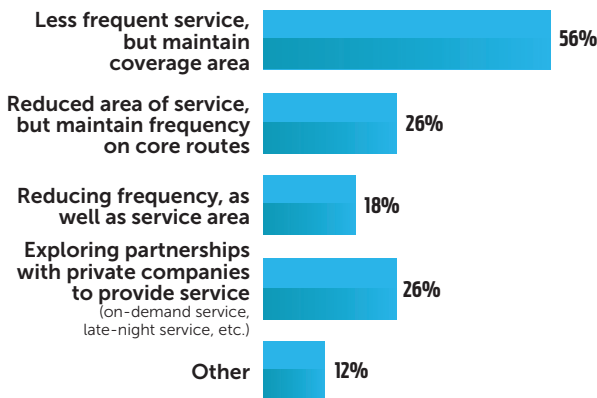
*Percentage represents rounded value of all answers within a category; total will not add to 100

What changes do you believe will impact the transit industry long term?



63% of respondents anticipate service changes in 2021 due to the pandemic.

What types of service changes are being evaluated and/or implemented?



*Percentage represents rounded value of all answers within a category; total will not add to 100

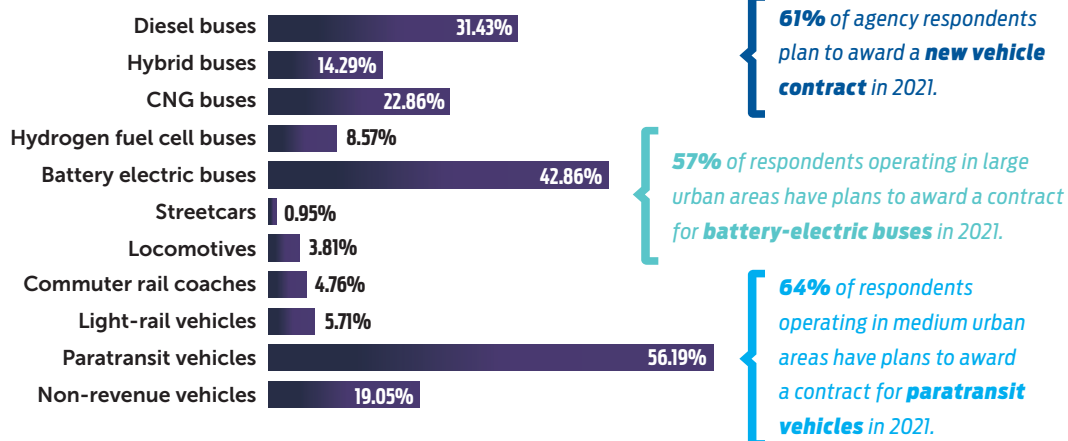
72% of medium urban area respondents and 93% of small urban area respondents believe there will be more contactless travel moving forward versus 60% of large urban area respondents.

More than 57% of rural area respondents believe there will be a long-term focus on rider experience.

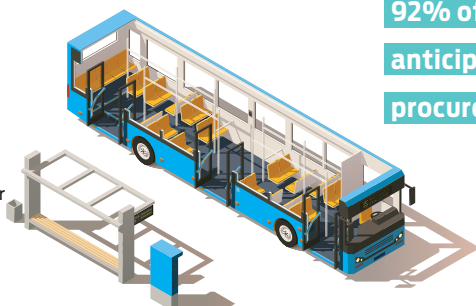
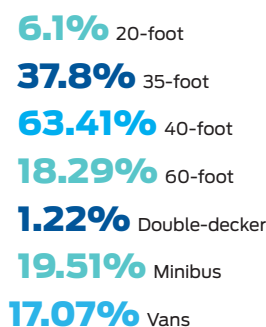
More than 50% of small urban area respondents believe the transit industry will see more or improved integration of services.

PROCUREMENT: WHAT VEHICLES WILL BE PROCURED? WHAT PURPOSE WILL THEY SERVE?

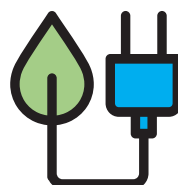
Does your agency anticipate awarding a contract(s) for new vehicles in 2021?



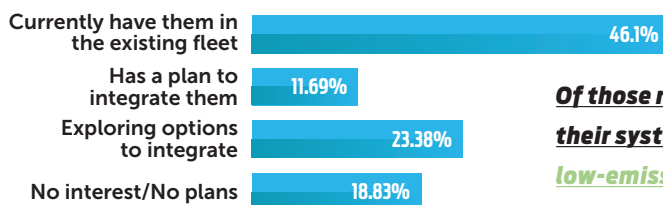
What size vehicle are you interested in procuring?



92% of all respondents anticipate the buses they procure in 2021 will be low floor.

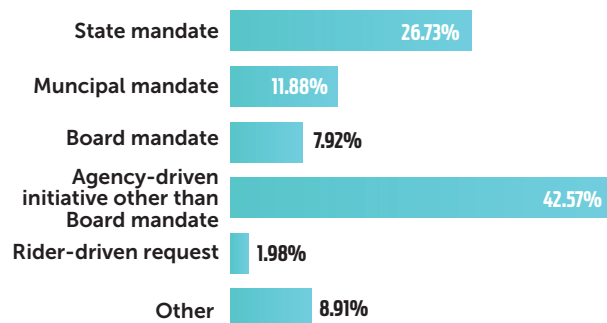


Regarding low-emission and zero-emission buses:



Of those respondents who answered their systems have a plan to integrate low-emission and zero-emission buses, the timeframe is to integrate these vehicles within the next year.

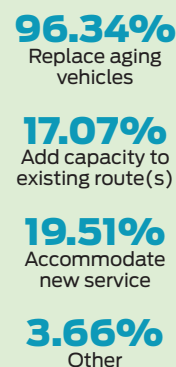
What is the main motivating factor for your agency's integration of low-emission and/or zero-emission buses?



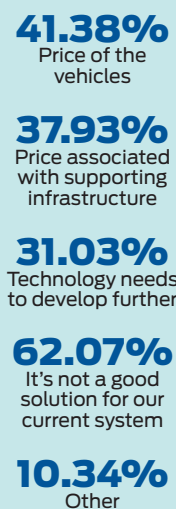
Other factors driving zero-emission integration:

- » Grant money specifically awarded for zero-emission vehicles
- » Overall concern with sustainability
- » Community driven/Community requested

What purpose will the new vehicles serve?



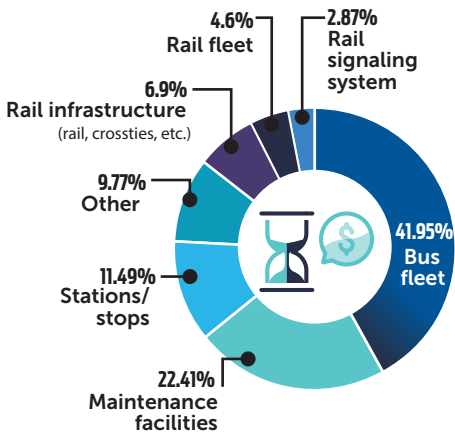
Which of the following factors contribute to respondents who selected "no interest/ no plans" to acquire zero-emission buses?



Two-thirds of "other" responses involved noted insufficient charging infrastructure as a factor determining plans to acquire zero-emission vehicles.

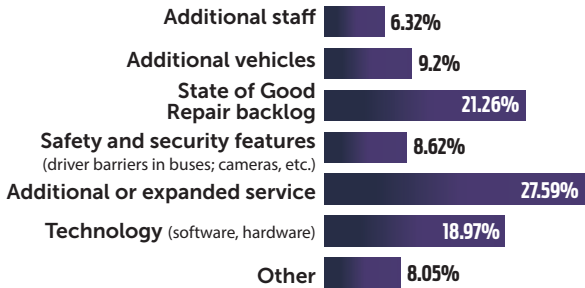
STATE OF GOOD REPAIR: WHERE IS INVESTMENT NEEDED?

Regarding the State of Good Repair backlog, what area of your transit system requires the most immediate investment?



- A selection of "other" responses to the State of Good Repair backlog question:
- » All of the above.
 - » Bus parking
 - » IT systems
 - » Electric vehicle infrastructure
 - » COVID-19 fighting cleaning supplies

If provided an unlimited budget, in which of the options below would your transit agency invest the most?

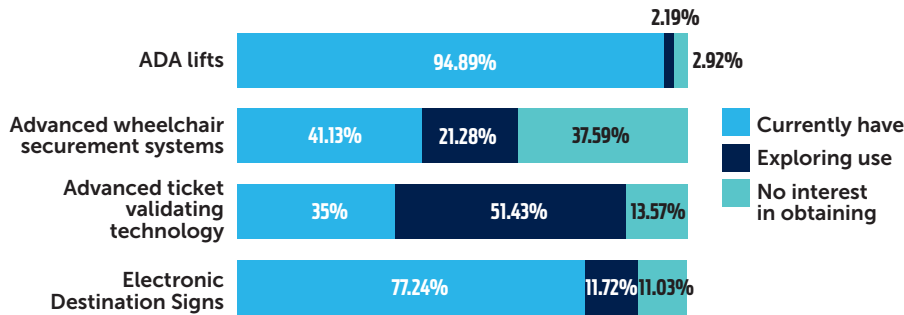


Half of the "other" responses to where unlimited investment would be applied include expanding, enhancing, rehabing or building new operations and maintenance facilities.

When compared to last year's report, "additional or expanded service" has dropped in overall priority while technology and the State of Good Repair backlog have increased in priority.

EQUIPMENT: ON VEHICLES AND AT STATIONS AND STOPS

Where does your agency stand as far as integrating the following technology onto its fleet and network?

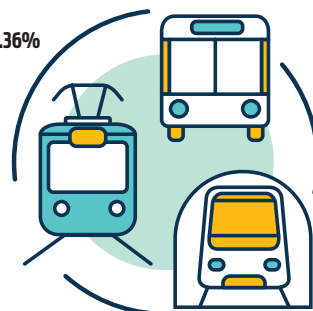
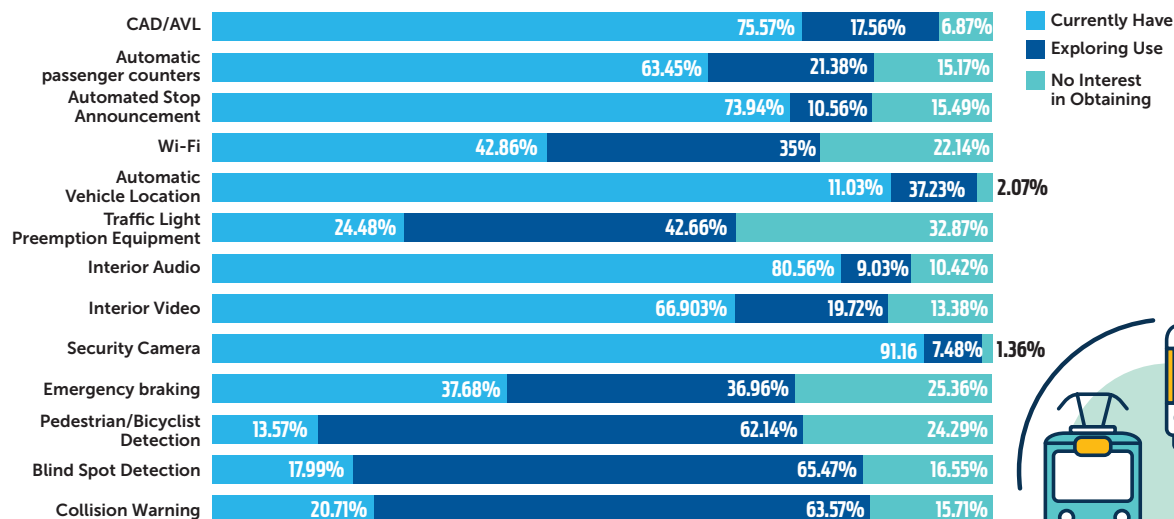


- Where interest can be found:
- » **Large**
Pedestrian/Bicyclist detection, Blind spot detection, Collision warning
 - » **Medium**
Advanced ticket validating technology, Pedestrian/Bicyclist detection, Collision warning
 - » **Small**
Blind spot detection, Collision warning, Pedestrian/bicyclist detection
 - » **Rural**
Blind spot detection, Collision warning, Pedestrian/bicyclist detection

Highest rate of adoption (excluding ADA lifts):			
Large Automatic stop announcement, Automatic vehicle location, Electronic destination signs	Medium Automatic vehicle location, Security cameras, Electronic destination signs	Small Security cameras, Automatic Vehicle Location, Automated stop announcement	Rural Security cameras, Automatic Vehicle Location, CAD/AVL

TECHNOLOGY: ADVANCES FOR SMARTER TRANSPORTATION

Where does your agency stand as far as integrating the following technology onto its fleet and network?



Does your agency use a mobile app to communicate with riders?

69.59%

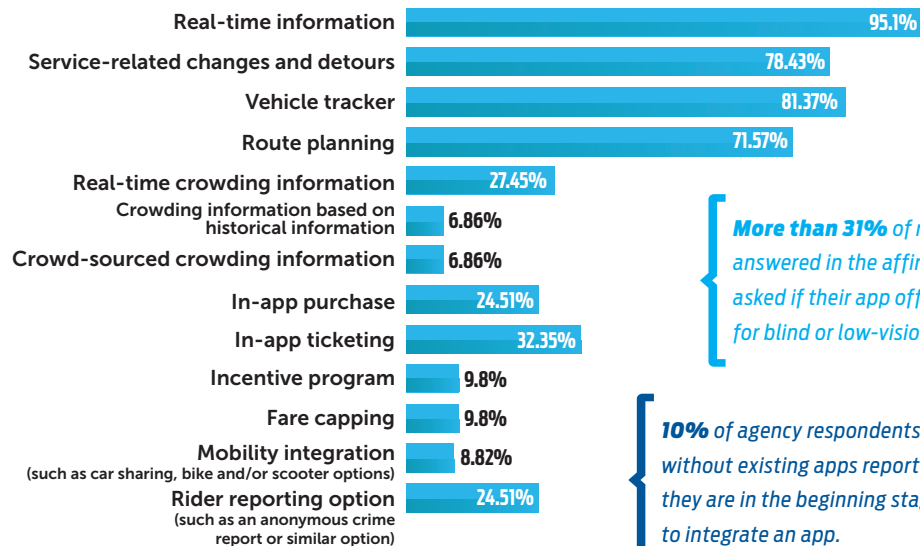
Yes

30.41%

No



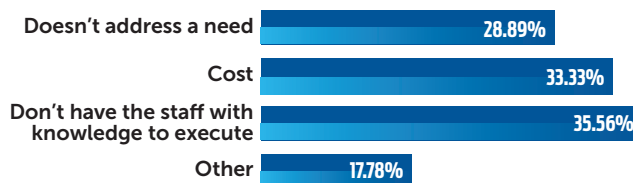
What information is provided to riders in your app? Select all that apply.



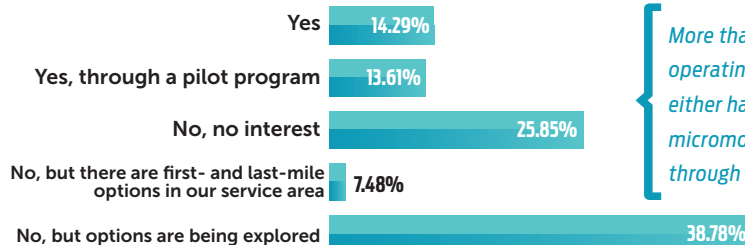
More than 31% of respondents answered in the affirmative when asked if their app offers usability for blind or low-vision riders.

10% of agency respondents without existing apps report they are in the beginning stages to integrate an app.

What's preventing your system from adopting an app?



Does your agency currently have any partnerships with Transportation Network Companies or micromobility providers?



More than 52% of respondents operating in large urban areas either have an established TNC or micromobility program or have one through an existing pilot program.

Basic: We are always trying to find incremental improvements, but haven't taken formal steps to adopt a data-driven approach.

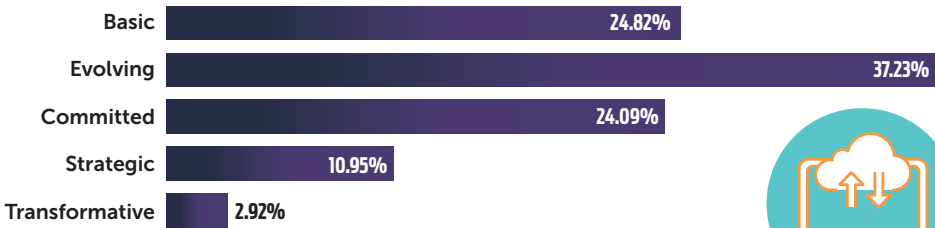
Evolving: We are aware of data-driven technologies and are actively evaluating their applicability in our business.

Committed: We have implemented data driven technologies in pilot projects and achieved good results.

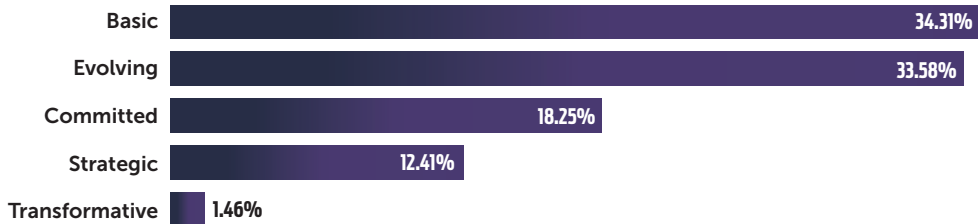
Strategic: We have implemented such techniques and supporting technologies, had great success and believe they have transformational potential in our business.

Transformative: Advanced data-driven techniques are part of our culture - all capabilities are adopted and used.

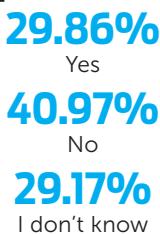
Advanced data-driven techniques have become much more prevalent and useful in recent years. Which statement best reflects your agency's capability to use them to achieve business goals?



In your opinion, which statement best reflects your organization's current capability to share data within a digital data environment?

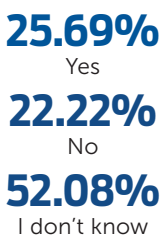


Has your agency implemented a Cybersecurity Incident Response Plan?

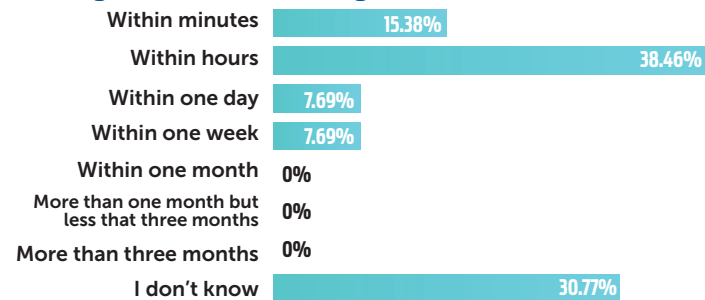


More than 70% of respondents knew if their agencies had a Cybersecurity Incident Response Plan, but less than half of those same respondents knew if their agencies had cybersecurity insurance.

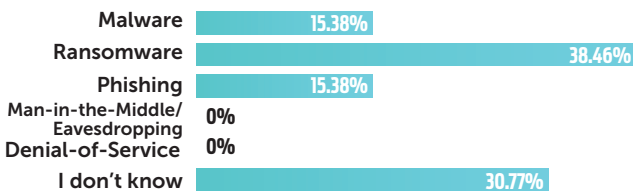
Has your agency acquired cybersecurity insurance?



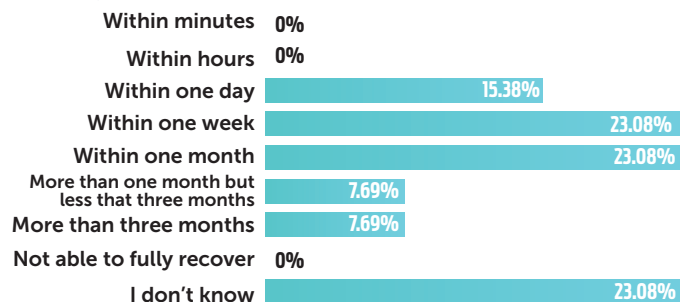
For those who indicated a cyberattack had occurred, it took the following amount of time to recognize an attack occurred:



The type of cyberattack to have been attempted on those who indicated their agencies had experienced an attack:



For those who indicated a cyberattack had occurred, it took the following amount of time to recover from that cyberattack:



Has your organization been compromised by a cyberattack within the past 12 months?

