



2022 Mobility Outlook

A snapshot of budget and service changes, as well as vehicle and equipment procurement expectations for the year ahead.

By **Mischa Wanek-Libman**, executive editor

This year marks *Mass Transit's* third time conducting the annual Mobility Outlook survey and, while threats from COVID-19 remain, there appears to be more hope attached to the upcoming year. In last year's report, about 45 percent of transit respondents expected slightly or significantly lower operating and capital budgets. In 2022's report, the weight of answers falls in a more positive direction with nearly 75 percent of transit respondents reporting budgets that will be slightly higher or significantly higher.

More than 56 percent of respondents from transit supporting entities, such as manufacturers, suppliers and consultants, report their company budgets have not increased for 2022, but they also report they do not anticipate the deep cost cutting measures from 2021 to repeat this year.

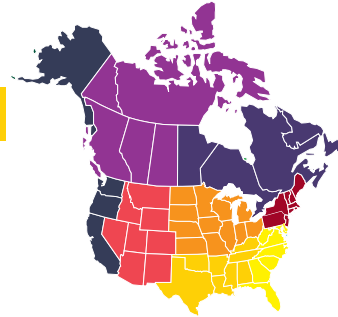
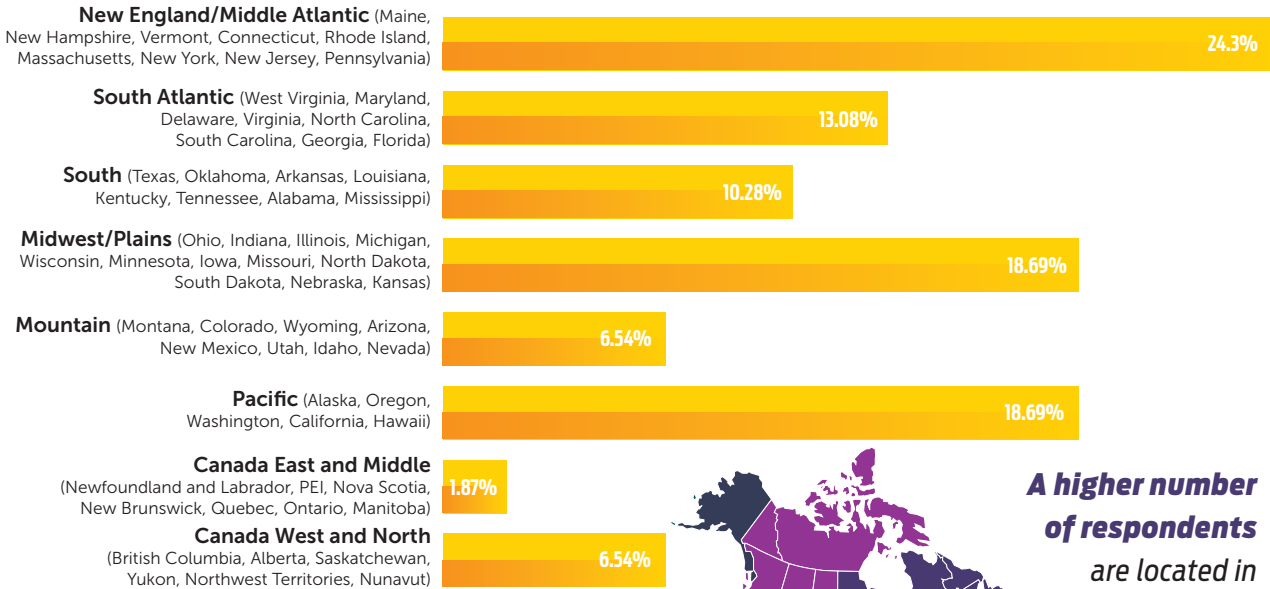
The pandemic continues to impact transit operations with transit agency respondents reporting concerns with continued reduced ridership, recruitment challenges and staff concern regarding health and safety among the top answers.

How was this information gathered?

Mass Transit queried transit agency subscribers, as well as representatives from private companies in January 2022. The survey received 278 responses with 124 from transit professionals and 154 from non-transit agency professionals. The survey included intelligence with separate questions being asked of the two groups. For example, the survey only asked transit providers if they planned to purchase vehicles in 2022. We believe the data found within this survey offers valuable insight as the industry continues to recover from the COVID-19 pandemic.

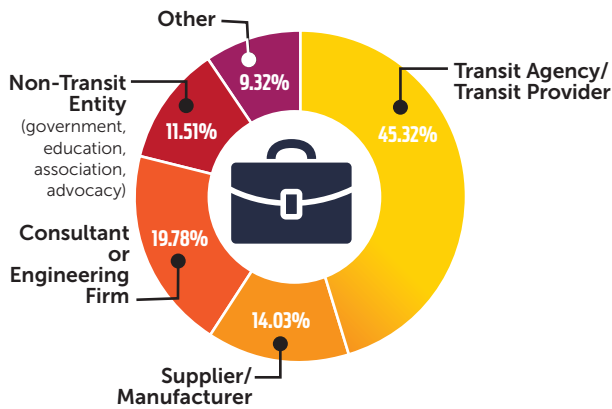
DEMOGRAPHICS: GEOGRAPHIC, SIZE AND SERVICES OFFERED

Where responding agencies are located



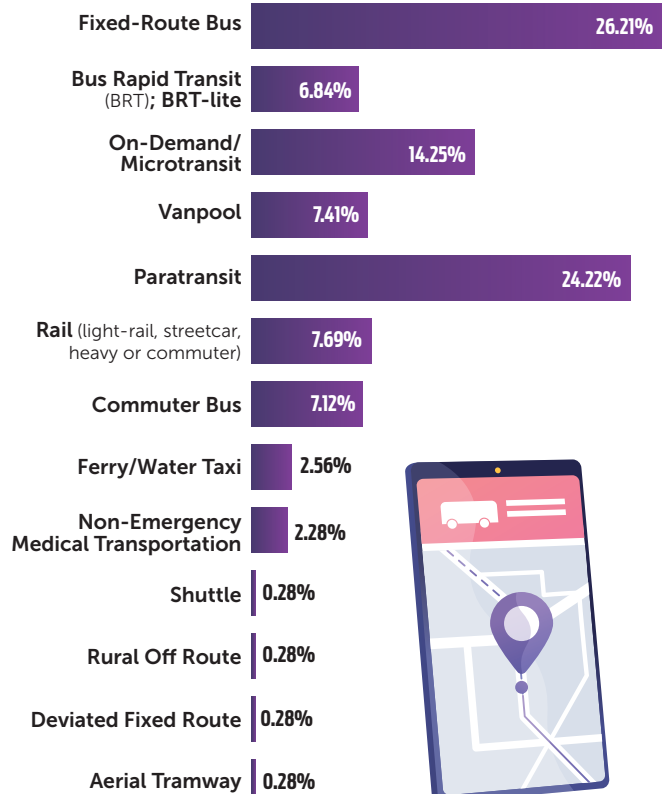
A higher number of respondents are located in New England and the Pacific regions than in previous surveys.

For which type of entity do you work?

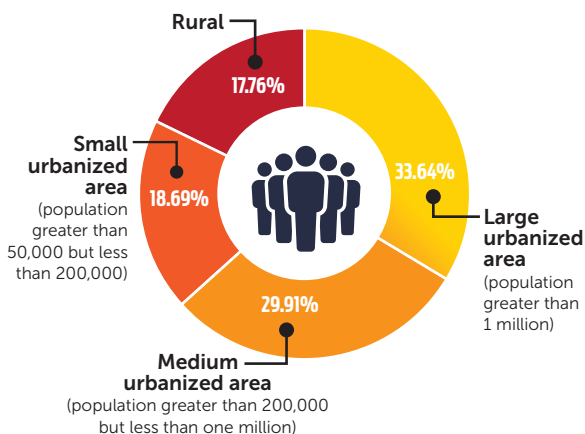


What services does your agency provide?

(select all that apply)

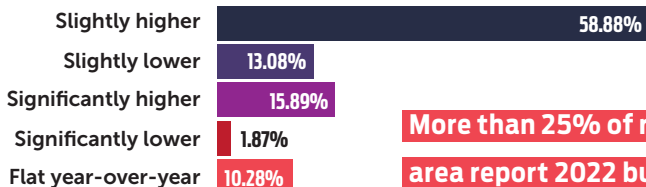


What is the population of your service area?



BUDGETS: 2022 BUDGETS COMPARED TO 2021

How does your anticipated 2022 budget, both operating and capital, compare to 2021?



Nearly three-quarters of respondents anticipate budgets that are slightly or significantly higher than 2021.

None of the respondents from rural areas reported budgets that were significantly lower.

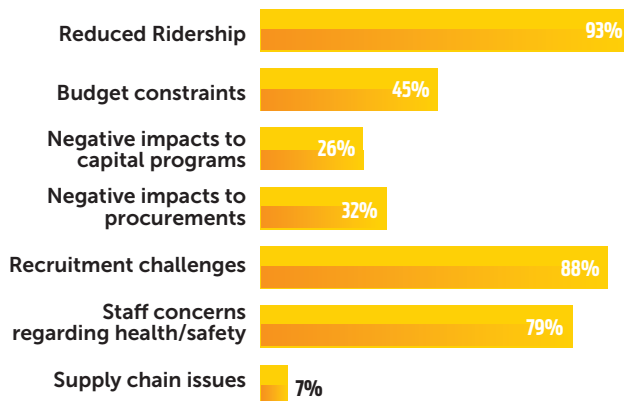
More than 25% of respondents operating in a large urban

area report 2022 budgets that are significantly higher.

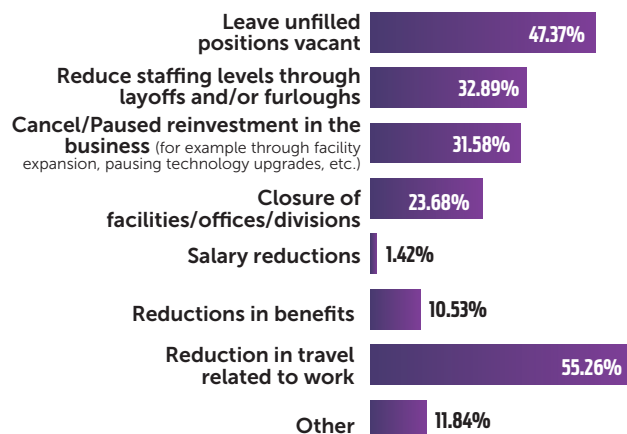
In contrast, 21% of large urban area respondents in last

year's survey reported budgets would be significantly lower.

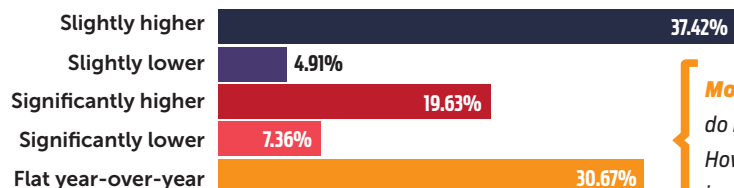
How has the pandemic impacted your agency's plans for 2022?



Private companies: Where will cost savings be realized?



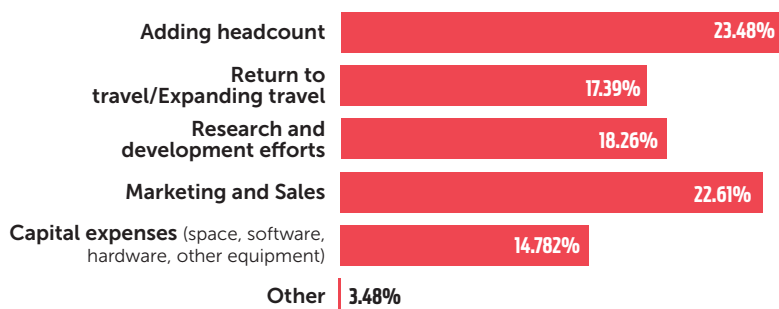
Private companies: How does your anticipated 2022 budget, both operating and capital, compare to 2021?



More than 70% of private companies do not anticipate cutting costs in 2022. However, more than 56% have not increased budgets in 2022.



Private companies: Where will your anticipated increased budgets in 2022 be seen?



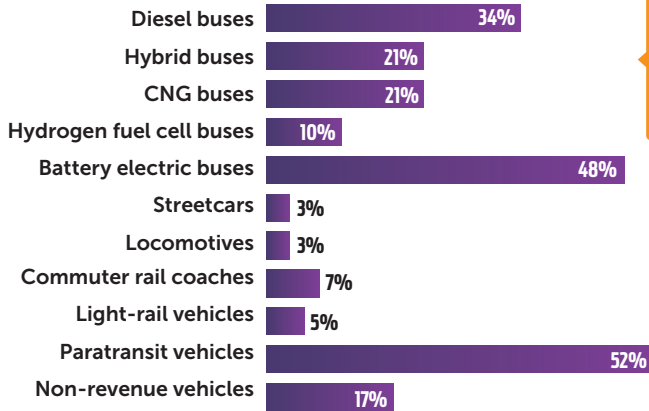
65%

of transit respondents anticipate service changes in 2022.

A higher percentage of respondents in large and medium urbanized areas anticipate expanding services in 2022.

A higher percentage of respondents in small urbanized areas and rural areas reported anticipated select route redesigns in 2022.

Does your agency anticipate awarding a contract(s) for new vehicles in 2022?



72% of respondents operating in large urban areas have plans to award a contract for battery-electric buses in 2022; this is up from 57% in 2021

9% of respondents operating in small urban areas and 8% of rural respondents anticipate procuring hydrogen fuel cell vehicles in 2022

45% of respondents operating in small urban areas have plans to award a contract for battery-electric vehicles in 2022

When evaluating a proposal to purchase new vehicles, in what order of importance would you place the following factors on the impact of the final selection? (higher score = higher importance)

- 3.33** Board mandate
- 3.87** Warranty
- 4.19** Service support
- 4.23** Previous experience with vendor
- 4.43** Vendor reputation
- 4.65** Total cost of ownership
- 5.59** Total value
- 5.71** Price

Respondents operating in large urban and rural areas ranked total value as the most important factor considered when purchasing new vehicles, followed by price.

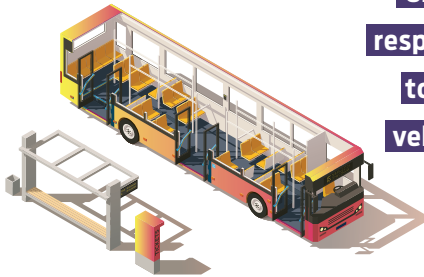
Respondents operating in medium and small urban areas ranked price closely followed by total value as the most important factors considered when purchasing new vehicles.

What purpose will the new vehicles serve?

- 97.87%** Replace aging vehicles
- 25.53%** Add capacity to existing route(s)
- 21.91%** Accommodate new service
- 2.13%** Other

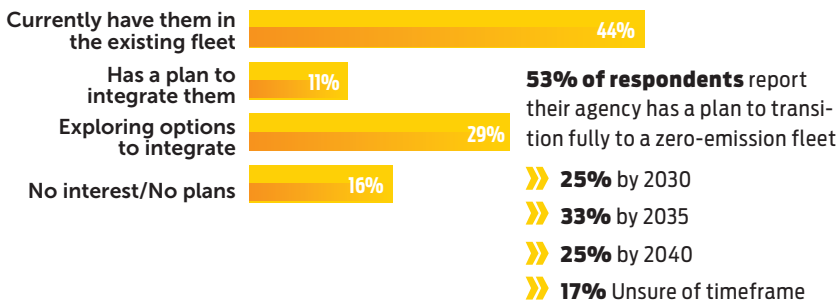
What size vehicle are you interested in procuring?

- 12.77%** 20-foot
- 31.91%** 35-foot
- 70.21%** 40-foot
- 17.02%** 60-foot
- 0%** Double-decker
- 17.02%** Vans
- 34.04%** Minibus

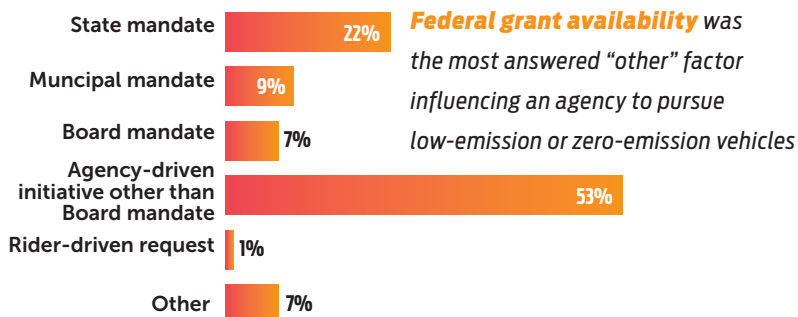


62% of agency respondents plan to award a new vehicle contract in 2022

Regarding low-emission and zero-emission buses:



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

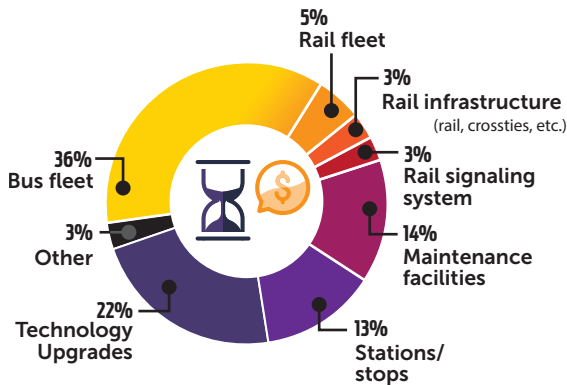


Which of the following factors contribute to respondents who selected "no interest/no plans" to acquire zero-emission buses?

- 54%** Price of the vehicles
- 62%** Price associated with supporting infrastructure
- 38%** Technology needs to develop further
- 69%** It's not a good solution for our current system
- 8%** Other

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?

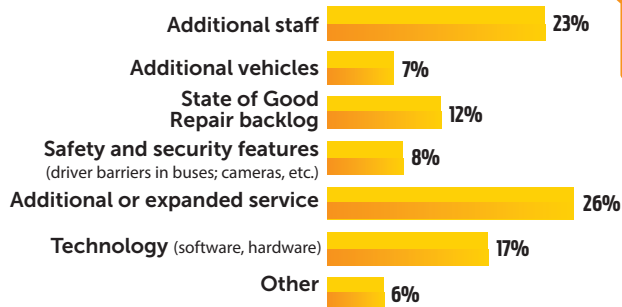


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More than 27% of large urban and small urban transit operators answered technology upgrades were in need of immediate investment.

More than 40% of medium urban and rural transit operators answered their bus fleets were the priority for immediate investments.

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



Popular "other" responses included funding to cover recruitment and training.

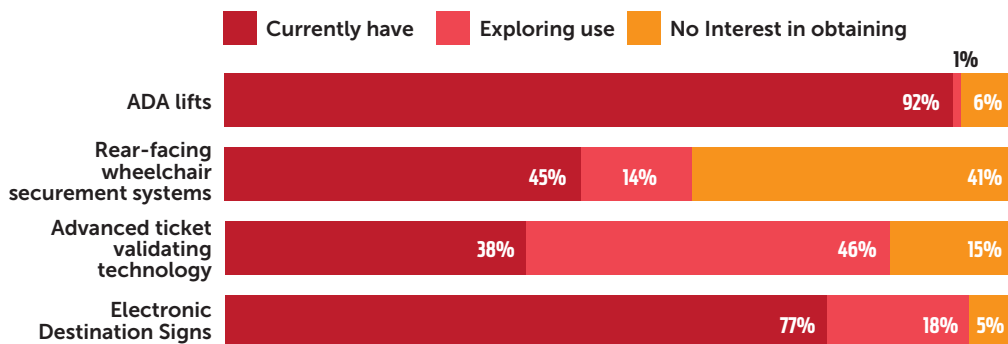
Additional staff was the least selected option in the 2021 report, it has jumped to the second most popular option on which to spend unlimited budget.

The size of service influenced where unlimited budget would be spent.

- » **Large urban area operators:** Additional staff
- » **Medium urban area operators:** Additional or expanded service
- » **Small urban area operators:** Technology
- » **Rural:** Additional or expanded service

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?

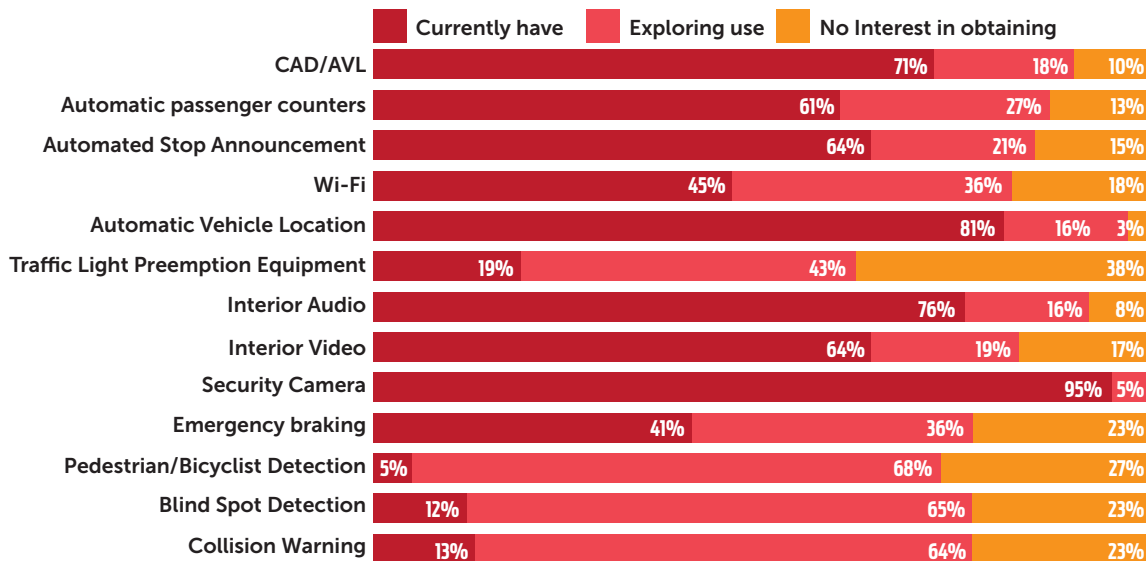


While large urban and medium urban respondents answered they had advanced ticket validating technology currently in use at a higher percentage than other respondents, more than half of rural area operators and nearly three-quarters of respondents operating in small urban areas answered they are exploring the technology's use.



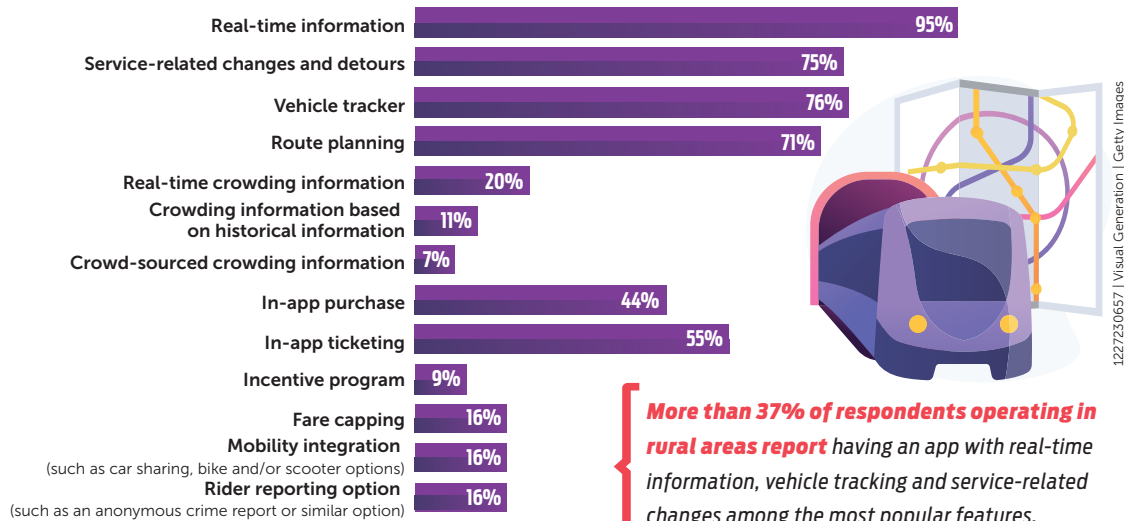
224988289 | Golden Sikorka | Dreamstime

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



Operators in rural areas were least interested in obtaining traffic light preemption equipment, but they indicated a significantly higher interest in exploring use of automatic passenger counters and wi-fi than operators in urban areas.

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



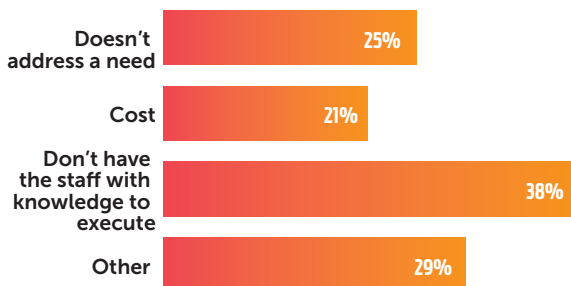
More than 37% of respondents operating in rural areas report having an app with real-time information, vehicle tracking and service-related changes among the most popular features.

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

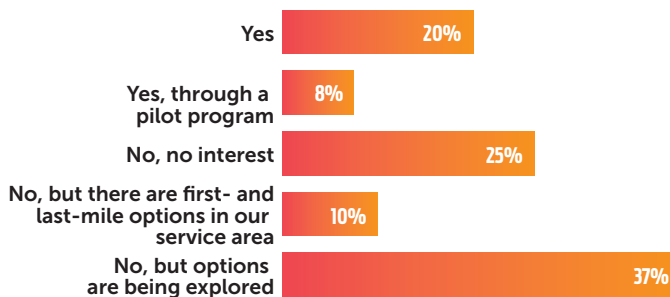
70%
Yes
30%
No

More than 32% of respondents answered in the affirmative when asked if their app offers usability for blind or low-vision riders, which is about the same compared to last year's survey.

What's preventing your system from adopting an app?



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



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

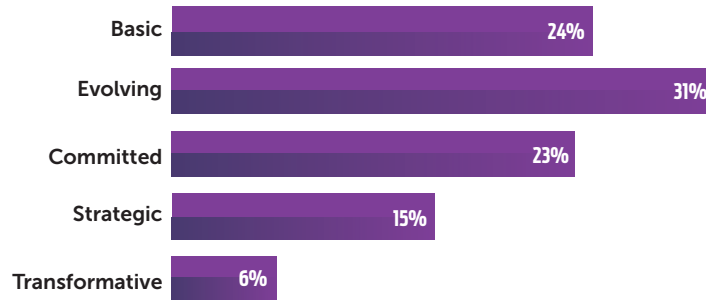
Evolving: We are aware of data-driven technologies and are actively evaluating their applicability in our business.

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.

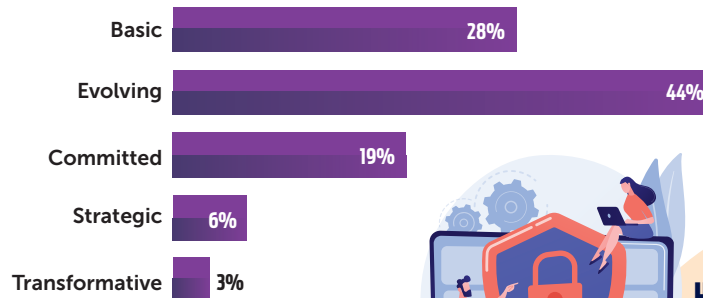
Transformative: Advanced data-driven techniques are part of our culture—all capabilities are adopted and used.

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?



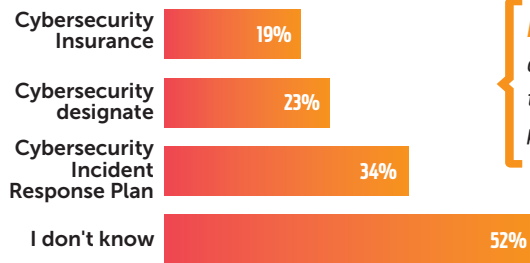
Continuing to evolve data-driven techniques: There is a marked increase in the number of respondents who classify their efforts as strategic or transformative compared to last year's survey.

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



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Does your agency have the following:



More than 42% of respondents operating in small urban areas report they have both a cybersecurity incident plan and a cybersecurity designate.

More than 78% of respondents report cybersecurity is a concern of their agency.

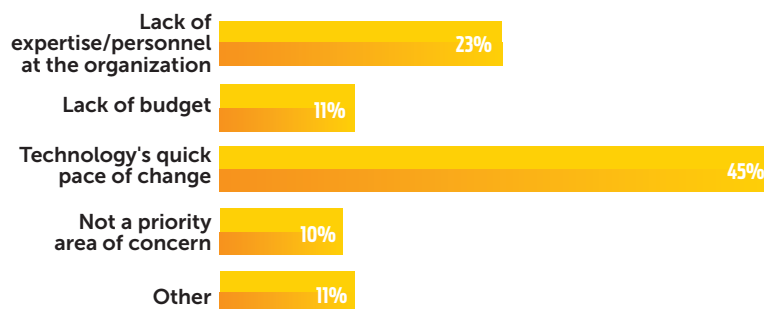
How often does your agency review its Cybersecurity Incident Response Plan?

48%
Once a year

5%
Every few years

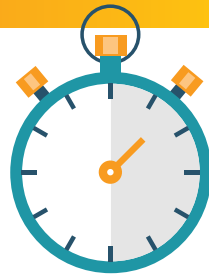
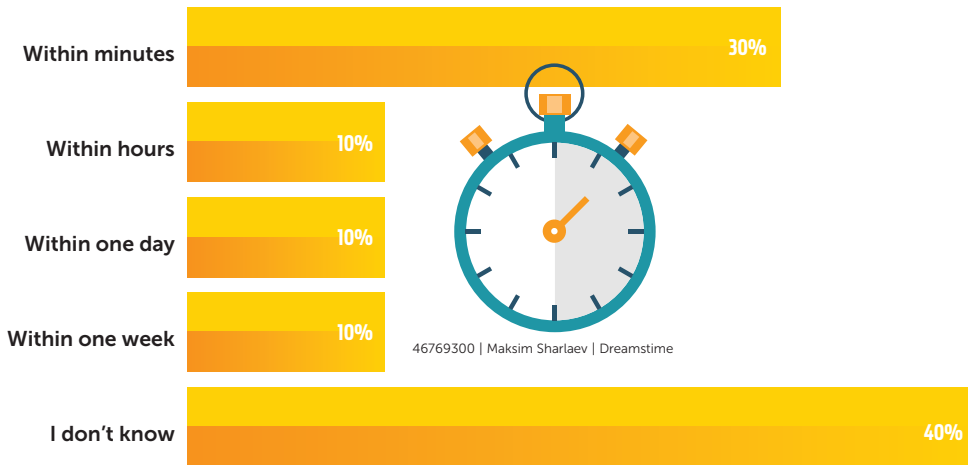
47%
I don't know

What is your organization's biggest challenge regarding enhanced cybersecurity?



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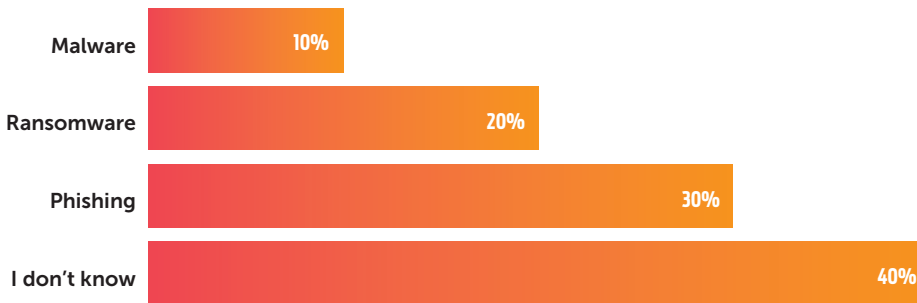
For those who indicated a cyberattack had occurred, it took the following amount of time to recognize an attack occurred:



46769300 | Maksim Sharlaev | Dreamstime



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

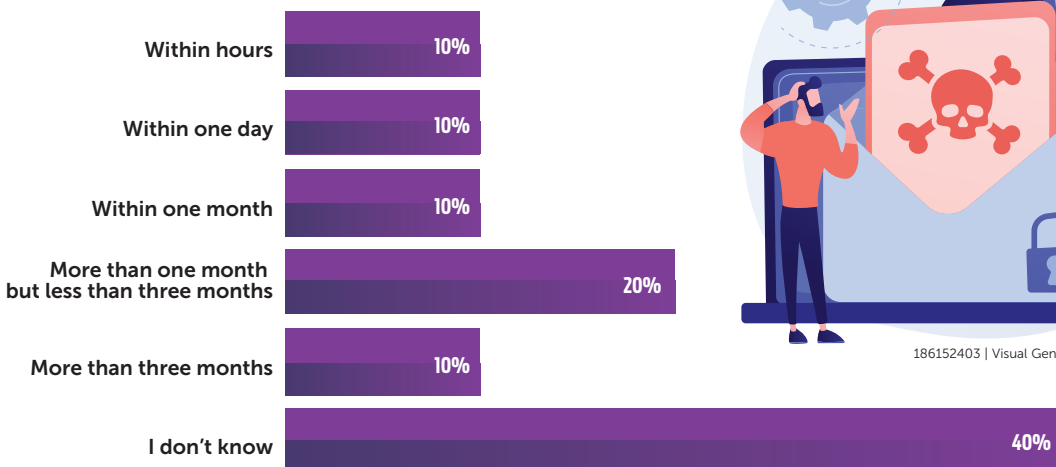


Has your organization been compromised by a cyberattack within the past 12 months?

13%
Yes

87%
No

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



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