



EXPLORER

Today's Challenges
for Tomorrow's Mobility

2018 Survey Results

Introduction

As an operator and global integrator of mobility, Transdev gives people the freedom to move whenever and however they choose. We are proud to provide 11 million passenger trips every day thanks to efficient, easy-to-use and environmentally-friendly transportation services that connect people and communities.

Our approach is rooted in long-term partnerships with local governments and transit agencies, and our commitment has always been to better understand their challenges, anticipate their needs and support their long-term vision. Since 2009, the Transdev Multi-Country Barometer Survey of transit agency leaders has been designed for this purpose and has produced a benchmark through time to assess mobility evolution and sometimes ...revolution.

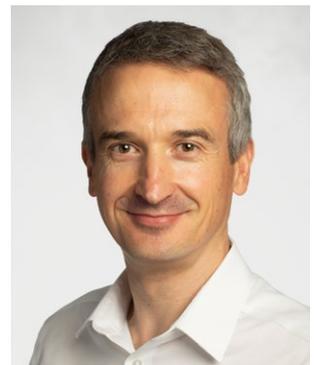
In the 2018 Edition, key transit decision-makers from 5 countries -the United States, Canada, Australia, New Zealand, and Sweden – were interviewed by Ipsos; a worldwide market research firm. The diversity of public transit policies in economic, demographic, and infrastructure contexts provide a wide-ranging view about the way Transit Authorities wish to shape mobility in the future. This 5th edition of our survey highlights a major inflection point in many aspects: acceleration of digital solutions, growing importance customer-centricity, interest in last-mile first-mile solutions and more.

We thank the transit leaders who kindly agreed to share their views with us and are pleased to bring these results to our industry. The rapid evolution of mobility is rich with opportunity. Our Transdev teams are pleased to share these results, but more importantly to demonstrate how our solutions are shaped by the needs of our passengers, clients, local communities and governments. We are inspired by the relentless pursuit of the safest and most innovative and sustainable mobility services.



Thierry Mallet

Chairman and Chief Executive Officer of Transdev Group



Yann Leriche

Chief Executive Officer of Transdev North America

***We are a team of people serving people to achieve better mobility.
We are the mobility company.***

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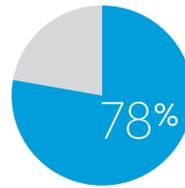
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Passenger Experience

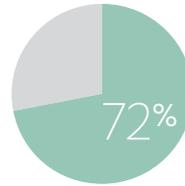
When asked about their most important goal for improvement, transit leaders rate the passenger experience first. Over 90% of respondents rank it as most important. Even more, when asked what they would do to **take action in improving services to passengers**, responses are very consistent among countries and quite comprehensive, including:

- Improving service to passengers and their satisfaction
- Enhancing courtesy and empathy of staff and instilling a service culture
- Providing a digital platform or app with all-in-one functionality for passengers.

On average, 66% of respondents see private sector operators as potential partners to help them implement such marketing programs. In addition, a significant percentage believe that private sector partners could



Transit leaders interested in using data science to develop or increase their knowledge about customers.
(Average - 5 countries)



Transit leaders interested in open data on mobility from all sources and stakeholders.
(Average - 5 countries)

help measure customer satisfaction (67%), manage customer complaints (67%), handle customer feedback via social media channels, (49%) and oversee call centers (44%).

Improving Transit System:

	 Aus / NZ	 U.S.	 Canada	 Sweden
Likelihood of improving the passenger experience in the next 3 years.	87%	98%	93%	91%

Interest in Mobility Services:

Currently testing or interested in testing in the next 3 years

	 Aus / NZ	 U.S.	 Canada	 Sweden
Using data science to develop or increase customer knowledge.	77%	80%	76%	79%
Open data on mobility from all stakeholders.	61%	71%	70%	84%

There is a strong link between improved passenger experience and ridership growth. Plans to prioritize ridership-building range from 80% to 100% across the five countries, even though ridership trends vary, with slight declines in the U.S. and growth in the other countries. Some 62% plan to re-design their bus services and routing, 80% plan to deploy a diversity of payment channels and 58% to 79% plan to implement ridership-building marketing programs.

“We have lower ridership and low density — this creates a challenge for cost recovery.” — a Canadian transit decision maker

“We need to find a combination between public and private transport to meet the inhabitants’ demands and make it easier to travel.” — a Swedish transit decision maker

FOCUS – U.S.

Transit leaders in the US continue to hold passenger satisfaction as a priority, with 98% likely to take action towards improving the rider experience in the next three years.

At Transdev, we keep passengers at the heart of everything we do. We do this by better understanding our

passengers through surveys, our Mystery Traveler program, and our customer feedback management program (Listen) where we record, respond and analyze feedback across multiple channels. This data provides insights into passenger perceptions, issues and trends. We rigorously audit our passenger experience, through

our formal program T.ex, to identify the pain points and opportunities to create a better passenger experience.

Our custom-built programs have been deployed in New Orleans, New York, Phoenix, Los Angeles and many other contracts in the U.S. and around the world.



2 Modal Integration

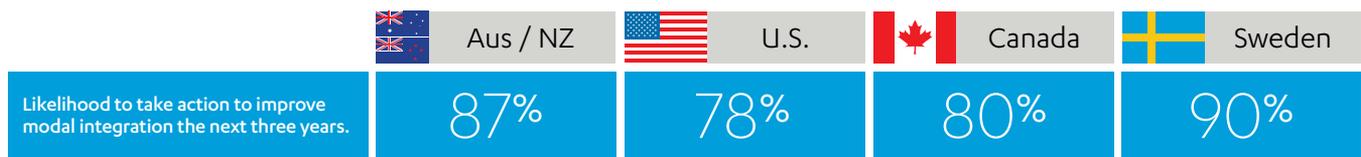
This is the second priority of transit agency leaders. A range of 78% to 90% across the 5 countries plan to take action to improve modal integration in the next three years. A high percentage expressed a commitment to the following:

- providing seamless end-to-end passenger journeys (67%)
- re-designing their bus system (61%)
- implementing or expanding ride-hailing (46%)
- implementing alternative modes (53%)
 - car share, bike share, car pools or ride sharing.

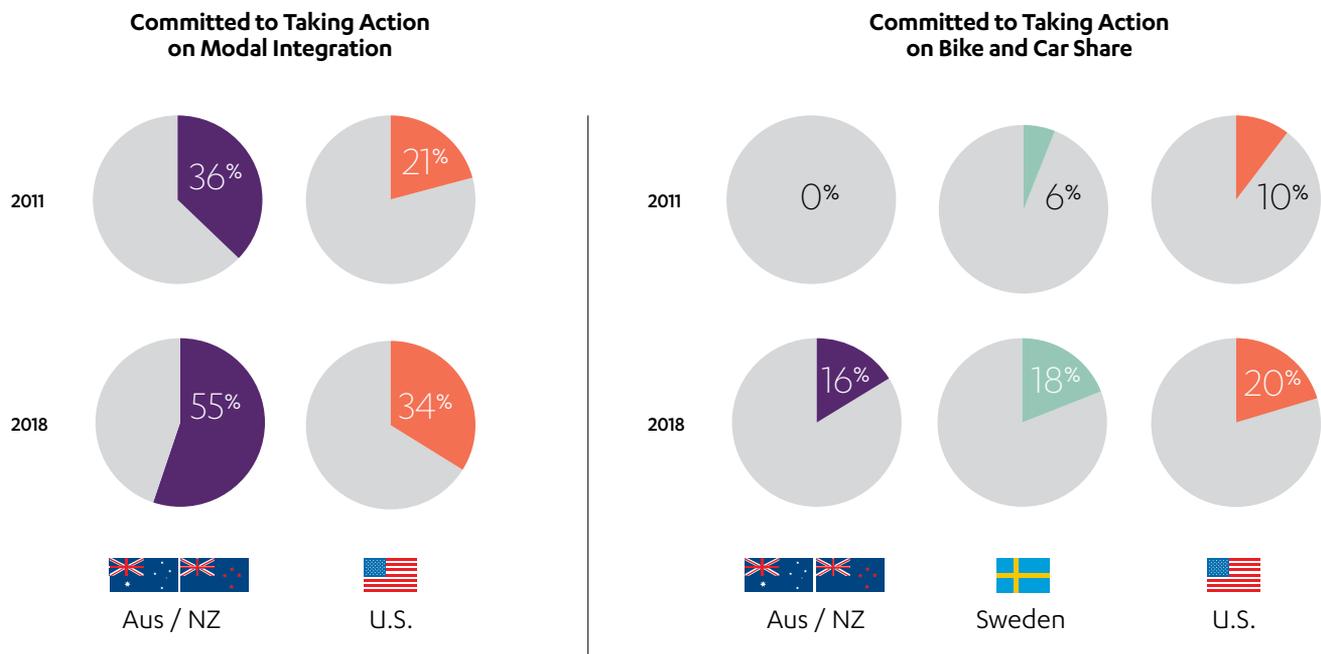
A high percentage look to private sector operators for proven intermodal expertise (64%).

“We need to evolve with changing rider trends and people’s interest for more on-demand services. Customers want service that is immediate, convenient, flexible and affordable. They are adopting ride share services for this reason, but ride share services are not always affordable or accessible. Our challenge is meeting the needs of these customers in a way that works and at a cost customers are able and willing to pay and that can be supported by taxpayers.”

— a Canadian transit decision maker



From 2011 to 2018, there is a significant increase in commitment to prioritizing modal integration:



FOCUS – U.S.

Passengers today expect seamless end-to-end mobility where all modes work together and are well-integrated. 78% of transit leaders plan to improve modal integration.

In New Orleans, we help the Regional Transit Authority connect multiple modes (streetcar, buses, and ferries)

for passenger convenience. Today 95% of all bus routes connect to the streetcar system. We also provide passengers with real-time information on bus/streetcar arrival times. Our on-demand service, GoMobile Link, connects people to and from bus and rail stops in Nassau County, NY improving modal connections.

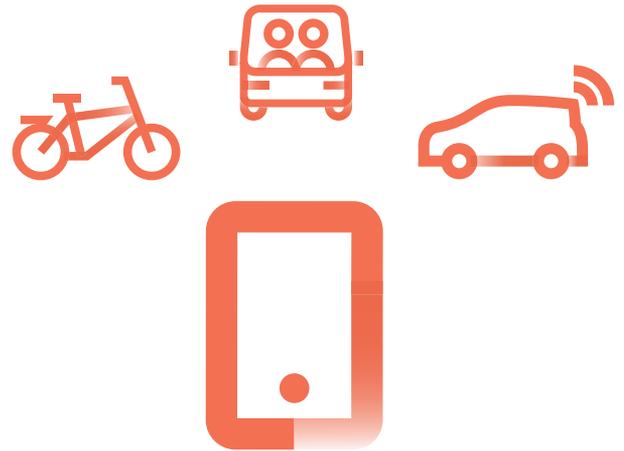
In dozens of other cities, Transdev has supported our clients in improving transfers and multi-modal connectivity, as it is a key contributor to passenger satisfaction with transit.



3

Mobility as a Service (MaaS)

We focused the 2018 barometer to include significant attention in the new mobility space, given the massive changes underway in our sector. This includes “Mobility as a Service” (MaaS) which is defined as a single place to plan, book and pay for mobility, combining public transit, car-pooling, ride-sharing, ride-hailing, bike-sharing and other services. Interest in MaaS is very high, in all countries, including 72% in Sweden and 74% in the U.S. who are either taking action toward implementing MaaS or are interested in developing it.

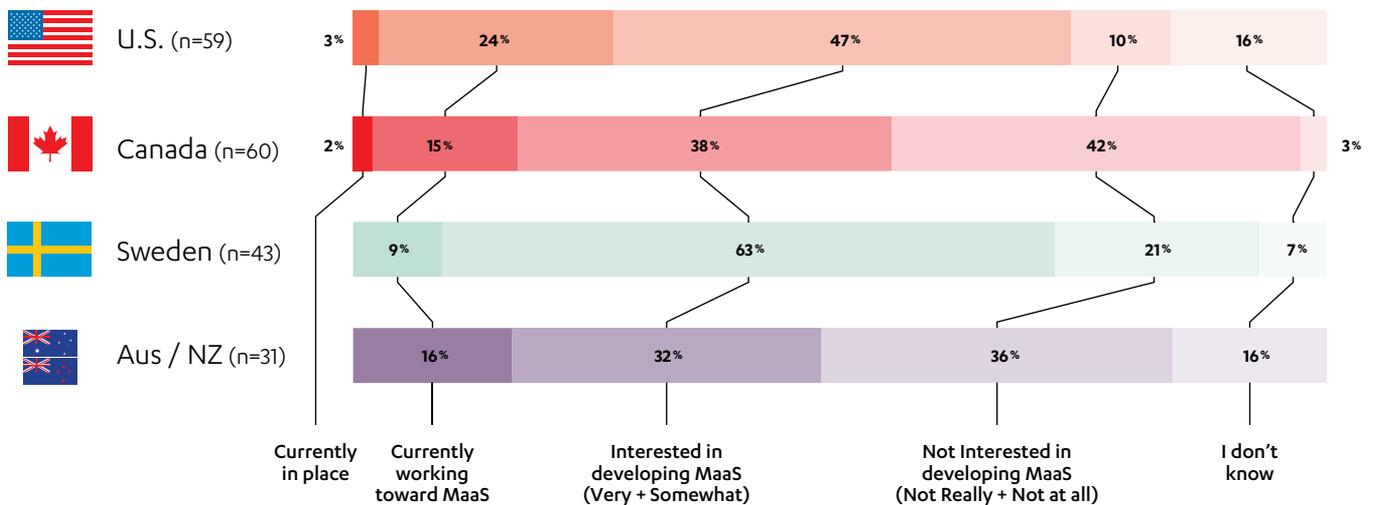


Keeping up with technological innovation to remain customer friendly and cost effective. — a U.S. transit decision maker

Relatively fewer transit leaders in Canada and Australia (55% and 48% respectively) are working toward MaaS or interested in doing so. Some 11% of all respondents don't yet know if they are interested in developing a MaaS platform.

Transit leaders in the U.S. and Sweden see MaaS as a major future opportunity for our industry and for passengers.

High Levels of Interest in Developing a MaaS Platform



FOCUS – U.S.

74% of transit authorities see MaaS as significant opportunity for the future. We are investing in technology to support our clients with innovative solutions for tomorrow, including MaaS.

Cityway, our wholly owned software development company, has

successfully piloted extensive MaaS precursors in several locations including Lyon and Mulhouse in France, and TripLinks in Toronto. In Toronto, CityWay created one integrated website showing all modes for 12 transit agencies. In Mulhouse, France our “Mobility Account” lets passengers book and

use all modes, with an invoice provided at the end of the month.

At Transdev, we know that MaaS will simplify and enhance the traveler experience to ensure passengers have easy and comprehensive access to see and book transportation options.



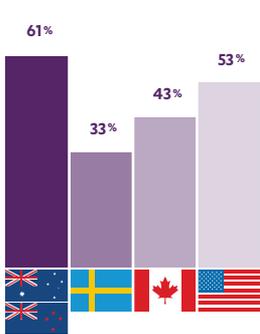
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Emerging New Mobility Options

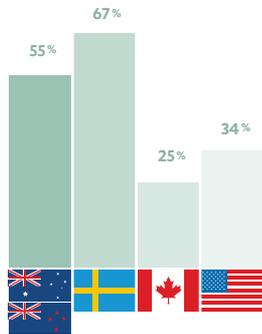
There are new technologies emerging which our training system must be on top of so that we are learning about the innovation and new technologies that are emerging in the industry. — a Australian transit decision maker

Interest in testing autonomous vehicles

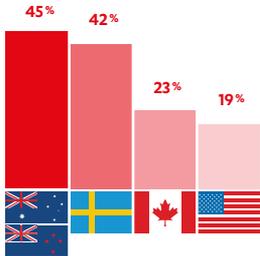
Australia / NZ (n=31), Sweden (n=43), Canada (n=60), U.S. (n=59)



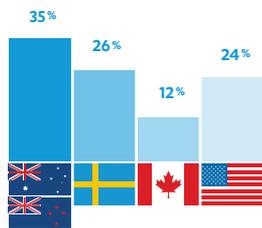
As a first and last mile solution
(shuttle, transport on demand, and targeting populations with specific needs)



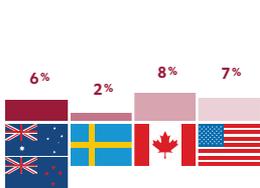
In closed environments
(hospital, university, and planned communities)



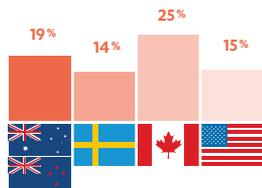
As a bus replacement for off-peak hours



In downtown pedestrian areas



Other



None

Amongst the questions raised regarding emerging mobility solutions, there is high interest in First and Last Mile solutions for low-density areas for the development of AV systems. First and Last Mile services are among the priorities to improve transit systems with expected action by 72% in Sweden, 68% in the US, and 65% in Canada, Australia/New Zealand.

Many see partnering with a private sector transit operator as a likely option, including 76% of transit leaders in the US, 70% in Sweden, 61% in Australia and 55% in Canada.

As for Autonomous Systems, all countries are interested in deploying and testing AVs in the next 3 years with an average of 43%, with the U.S. at 52%.

There's a possibility of deploying AVs in a shuttle service within airport parking areas – but not on public airport roads. — a U.S. transit decision maker

Transit authorities see AVs as strong contenders for utilizing in First/Last Mile solutions. The top ways transit leaders see the following uses of AVs:

- First and Last Mile Solutions (47%)
- Closed environments like hospitals, universities and planned communities (42%)
- Bus replacement at off peak hours (30%)
- Downtown pedestrian areas (22%)

FOCUS – U.S.

Our goal is to help clients launch on-demand and autonomous operations that blend seamlessly with existing mobility options.

Our recent pilot program with HART in the Tampa area proved that on-demand shared first/last mile options are popular and practical.

We've taken that experience to Nassau County where our on-demand shuttle connects people to bus and rail stops and to LA Metro where we are helping examine the feasibility of microtransit options.

We are operating AV shuttles for clients in Gainesville (from a major

university to downtown), in Jacksonville (a pilot to see if shared AVs can replace a tram network) and in Babcock Ranch near Fort Myers where we are developing an autonomous network for the planned 50,000 residents of the first completely solar city in the country.



Working in Partnership

The pace of change is accelerating. Resources are constrained. And transit agencies face growing demands for better passenger experience, seamless integrated journeys, and new mobility options.

Transdev's 2018 survey of leaders of U.S. transit agencies puts quantifiable numbers to these challenges and opportunities:

- 98% of authorities surveyed want to enhance the passenger experience and 80% plan to use data science to increase customer knowledge.
- 78% want to improve inter-modal integration for seamless end-to-end journeys.
- Over half are looking to new mobility options like first and last mile services, MaaS, and AV shuttles.

This rich survey data combined with our experience delivering quality transit operations, helps us provide informed, tailored solutions for communities on the move. Transdev is delivering clients a full suite of tailored digital options to blend into existing transit systems.

Improving Passenger Experience

Transdev's multiple customer service programs (Mystery Traveler, T.ex – assessment of the Passenger Experience, Passenger Surveys, and LISTEN – customer feedback management program) help you audit, record, analyze and improve all aspects of the passenger journey.

Our proven programs help design the most positive passenger experience.

Modal Integration

Transdev is committed to support Transit agencies in providing seamless end-to-end passenger journeys. We do this by using Transdev's rigorous service planning expertise, implementing tech solutions like our GoMobile app and our digital platform for MaaS (Mobility as a Service).

The results: optimized connections to move passengers.

Emerging New Mobility Options

We believe the future of mobility will be increasingly Personalized, Autonomous, Connected and Electric.

Our clients can navigate these transformations thanks to partnering with us to launch autonomous vehicles (AVs), and on-demand microtransit solutions for first and last mile gaps and low density areas.

Transit agencies, cities, and universities in over 200 cities and communities trust us to manage and operate their transit systems. Our commitment to people inspires us to deliver the best that public transit can offer. Our track record includes decades of dedicated service. This is why in this time of tumultuous change, successful transit agencies see the financial, operational, and technical benefits of partnering with private sector transit providers like us.

We help clients to help passengers move freely and connect to their jobs, their loved ones and their communities.

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integrator of mobility,
**Transdev gives people the
freedom to move** whenever
and however they choose.



Transdev Group
3 Allée de Grenelle,
92130 Issy-les-Moulineaux
France
Tel.: +33 1 74 34 20 00
www.transdev.com

Transdev North America
720 E. Butterfield Rd., Suite 300
Lombard, IL 60148
United States
Tel.: (630) 517-7070
www.transdevna.com

