UITP EUROPE

WIN BACK PASSENGERS

FACTS, FIGURES AND THE NEW NORMAL

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FOREWORD

Minna SOININEN
Chair of UITP EU Committee

Since the beginning of this unprecedent global sanitary crisis, the "Guardians of mobility"[1] have demonstrated their capacity to be present, reactive, and innovative, guaranteeing thereby a mobility insurance notably to essential workers and health professionals. Despite the successive lockdown periods and a dramatic fall in passengers, they have made everything possible to guarantee the continuation of public transport services.

With this report, UITP aims at providing an overview of the measures implemented by public transport operators and authorities, sometimes at a moment notice, as well as feedback on the effectiveness of these measures, analysed in a cold light.

Looking ahead, the conclusions of this report describe what could be "the New normal" in a post-covid environment. Hopefully it will serve as a basis for further discussions with EU institutions and actors involved in making safe and sustainable mobility for all.

I wish you a good reading.

INTRODUCTION

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Since the first lockdown in spring 2020, the public transport sector, all modes and worldwide, has been implementing measures to win back passengers. Public transport operators and authorities have indeed responded to this double challenge of ensuring a high level of transport offer in times of a global sanitary crisis, while experimenting new measures to make passengers feel confident.

Since the outbreak of the crisis, UITP has made regular reports[2] about all measures taken by their members, with the help of a dedicated global "COVID Task Force". Areas covered include cleaning facilities, defining a new transport offer and fare policy, implementing innovative tools to organise passenger flows, communication...

With the (hopefully) end of the crisis in sight, it is time to assess the challenges and benefits of all the new measures that have been tested, rate them according to their effectiveness to win back passengers and draw conclusions for the post-COVID era.

We are therefore pleased to present you the first assessment of measures implemented since the beginning of the pandemic.

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1 In March 2020, UITP released a Factsheet providing recommendations for its worldwide community of members on how to prepare their transport networks for this pandemic, recognising the role of public transport workers as the "Guardians of mobility"
More information on https://www.uitp.org/news/the-guardians-of-mobility-keeping-cities-alive-and-moving/
2 To name just a few :
- Regaining passenger trust with CO-APS: talks with Barcelona and Karditsa
- Preparing for a better future: How transport authorities have managed the crisis
- With the right measures, public transport is Covid-safe
- Mobility post-pandemic: A strategy for healthier cities

EXECUTIVE SUMMARY

This report has been prepared based on a questionnaire sent during summertime 2021 to UITP members asking them about which measures they have implemented and how effective those measures were to win back passengers. The scope of the assessment encompasses all public transport modes and targets both operators and authorities.

In total, **38 public transport operators and authorities** of more than 15 EU and non-EU countries and covering all public transport modes (urban and regional busses, suburban and regional rail, metros, light rail/tramway, waterborne) **have contributed to this survey**[3].

The results of this assessment show that **the common backbone of measures implemented** since March 2020 is generally seen as having a **positive immediate effect**.

To address the long-term changes in mobility patterns in the post-Covid era, it seems clear that **the New normal will include an acceleration of the public transport sector's digitalisation, reinforced cleaning operations as well as increased and targeted communication to passengers**.

Besides these core measures intended to win back passengers, specific measures aiming at **protecting public transport workers** will remain, such as plexiglass screen in the driving cab or reinforced cleaning of stations desk and driving cabs.

From a financial perspective, public transport operators and authorities have largely chosen to **let the ticket prices unchanged**, in line with the public transport sector's values of **inclusiveness** and **affordability.** However, this affects the economic equilibrium of public service contracts, shedding a light on **the importance of financial support** at both national and European levels.

Considering the above, in order to make the transition to the New normal a success for public transport, **UITP strongly encourages the European Union to:**

❯ Place public transport at the heart of any urban mobility initiative

❯ Involve the public transport sector in any decision impacting their services

❯ Continue investing in public transport

❯ Support the public transport sector's resilience with research and its operational deployment

❯ Ensure legal security.

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3 Some respondents did not answer all questions. This report gathers the results when statistically significant.

I. FIRST ASSESSMENT OF THE CRISIS MEASURES

A. FEEDBACK ON THE IMPLEMENTED MEASURES

A. CLEANING AND DISINFECTION

When the pandemic began, public transport operators and authorities implemented a wide variety of cleaning procedures that **go well beyond the pre-covid regime for cleaning operations.**

Assessment of the effectiveness of current measures

A set of core measures was collectively adopted by 2/3 of the respondents, as exposed in the table below.

CLEANING AND DISINFECTION MEASURES	% of implementation among respondents	Effectiveness to WBP (1 to 5)	Cost-benefit rating (1 to 5)
Implementation of cleansing gel dispensers in station premises	59%	3.5	3.0
Additional roving cleaning teams deployed on-site	50%	3.0	2.4
Increase in waste disposal	31%	2.2	2.4

Conversely, these core measures are perceived as being effective to help increase passengers' confidence, or as an effective tool to bring passengers back in public transport. The increasing of air renewal features the best effectiveness and the best cost-benefit rating. It should be noted that the assessment is somewhat less positive regarding the cleaning reinforcement of stations' staff desk and driving cabs, which is less visible for customer and targeted to operations staff.

When including the cost component in the assessment of these measures, the cost/benefit analysis logically decreases for the two most popular measures implemented, due to the considerable workload required to scale-up cleaning operations in rolling stock and stations. However, the reinforcement of cleaning of stations' staff desk and driving cabs is perceived with a better cost-benefit (easier to only clean the cab than the entire rolling stock).

Other cleaning and disinfection measures received a half-hearted welcome:

CLEANING AND DISINFECTION MEASURES	% of implementation among respondents	Effectiveness to Win Back Passengers "WBP" (1 to 5)	Cost-benefit rating (1 to 5)
Increased frequency of interior cleaning for rolling stock	94%	3.8	3.1
Increased frequency of cleaning of stations (floor, doors, etc), notably touchpoints	71%	3.4	2.6
Reinforced cleaning of stations' staff desk and driving cabs	76%	2.7	3.1
Increased air renewal	61%	4.1	3.8

The implementation of **cleansing gel dispensers** in station premises[4] is positively assessed (almost 2/3 of respondents implemented this measure, which effectiveness and cost-benefit are above the average rating).

Additional roving cleaning teams deployed on-site was implemented by only half of the networks (50%). Even though visible cleaning staff on-site may contribute to help increase passenger confidence, **its effectiveness and its cost-benefit appear as quite limited.**

The increasing in waste disposal comes last, due to both a poor perception of effectiveness, and a poor cost-benefit analysis.

Finally, one respondent mentions that passengers feel safer when **the inside of the vehicles smells like disinfection products.** Another one mentioned that **bus doors were open at each stop**, even if not necessary, to increase air renewal. One respondent mentioned a **process initiated on its metro network to get a certification for Covid-safe environment.**

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4 One respondent spontaneously mentioned the implementation of cleansing gel on-board the tramway.
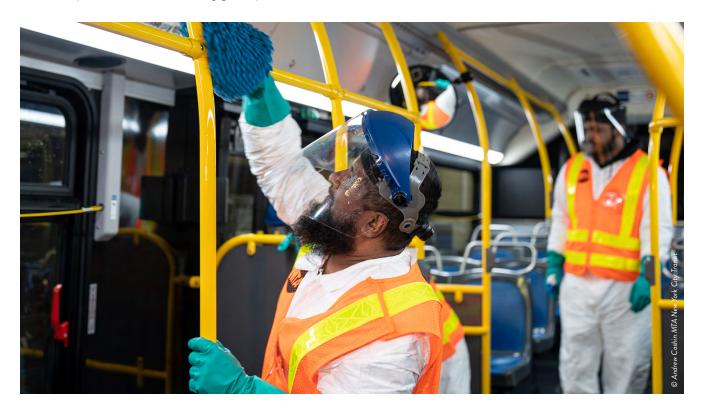
Opportunity of maintaining crisis measures

CLEANING AND DISINFECTION MEASURES	% of respondents declaring the measure would be done again in case of new pandemic	% of respondents declaring the measure would be implemented in the long term
Increased frequency of interior cleaning for rolling stock	97%	45%
Increased frequency of cleaning of stations (floor, doors, etc), notably touchpoints	85%	29%
Reinforced cleaning of stations' staff desk and driving cabs	92%	56%
Increased air renewal`	83%	52%
Implementation of cleansing gel dispensers in station premises	78%	48%
Additional roving cleaning teams deployed on-site	58%	17%
Increase in waste disposal	55%	26%

In the event of a new pandemic, the hierarchy of measures, as exposed above, would remain still: the core measures (increased frequency of interior cleaning for rolling stock, cleaning of stations, cleaning of stations' staff desk and driving cabs, increased air renewal) are praised, with the support from 80% of the respondents or more (see table above). We can also highlight the high rating given to the implementation of cleansing gel dispensers in station premises, which almost 4 respondents out of 5 would consider implementing. Additional roving cleaning teams and increase in waste disposal come last, even though both of these measures would be considered by more than half of the respondents in the event of a new pandemic.

In the long run, interestingly enough, the two most popular cleaning measures implemented during the COVID-19 crisis (increased frequency of cleaning for rolling stock and for stations) are not put forward. This shall certainly be read in conjunction with the high cost of implementation for those measures, that cannot be part of the "New normal".

However, three measures would emerge from the COVID crisis, as about 50°% of respondents consider implementing them on the long run: the reinforcement of cleaning for stations staff desk and driving cab, the increasing of air renewal and the implementation of cleaning gel dispensers.

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B. SOCIAL DISTANCING AND CONDITIONS OF CARRIAGE

Assessment of the effectiveness of current measures

The breakout of the pandemic has initiated a **blooming of initiatives to limit passengers contact and interactions** during their daily commute. As for cleaning and disinfection activities, we can arrange the measures according to how they were implemented during the crisis, as presented in the following table.

SOCIAL DISTANCING MEASURES	Implementation rate among the networks	Effectiveness to WBP (1 to 5)	Cost-benefit rating (1 to 5)
• Distribution of facial mask for staff • Plexiglass screen in the driving cab • Compulsory mask wearing	> 90%	3.8 – 4.6	3.6 – 4.4
• "Back door boarding only" in buses • Stop selling tickets on-board • "one seat out of two" policy • ground stickers to identify standing positions • One-way passenger flow with signage	65% - 80%	See comments above	
• End of on-site ticket distribution • No /Limited eating while on-board • Staff's temperature checks • Distribution of facial masks for passengers (vending machines)	20% - 50%	See comments above	
• No phone call while on-board	10%	2.6	2.9
• Questionnaire to passengers on their health condition	0%	1.6	2.3

Three measures were praised during the crisis (implementation **rate >90%),** namely **the use of facial mask for staff, for passengers, and the use of plexiglass screen in the driving cab**. In a customer-centric approach, one respondent points out that facial masks were distributed to passengers whose masks were deficient (broken elastic string, for instance).

A second group of measures also received **a warm welcome** (65% - 80%). This group notably encompasses **passenger-oriented measures aiming at evenly distributing passengers and passengers' flows** within the transport premises.

Among these two first groups of measures most implemented during the crisis, **many of them are staff-oriented** and serve the purpose of **limiting the staff/passengers' exposure**: plexiglass screen, back door boarding, stop selling tickets on-board, distribution of facial masks for staff. This demonstrates the consideration given by employers to frontline staff during the crisis, despite shortages or supply chain disruption that might have surged, especially at the beginning of the crisis.

A third group gathers less popular measures, with an implementation rate ranging from 20% to 50%.

As an anecdotical topic, 3 networks out of 38 implemented a "no-phone call on-board" policy.

One respondent mentioned automatic entrance control at stations and on-site staff deployed on platform to prevent overcrowding as an efficient measure to help social distancing.

No network has reported the implementation of questionnaire to passengers on their health condition; this type of measures, that has been enforced somehow for long-distance transportation services, is not suitable for reservation-free public transport in urban areas.

When it comes to the assessment of each measure, whether on their effectiveness in the absolute or in a cost-effectiveness approach, it is no wonder that group 1 measures, i.e **compulsory mask wearing for passengers, distribution of facial mask for staff and plexiglass screen, are granted the better ratings**.

Interestingly enough, the mid-table of the ranking features various measures for which the average rate conceals starkly different assessments from the respondents. Generally, the effectiveness and the cost-benefit rating are positive, however, while some respondents give them the highest scores, others give them the lowest scores.

In other words, **it is not possible to draw common perspectives on the effectiveness nor on the cost/benefit** among the 38 respondents **for measures such as:**

- ❯ "one seat upon two" policy
- ❯ one-way passengers flows with signage
- ❯ Ground stickers
- ❯ Distribution of facial masks for passengers or through vending machines
- ❯ No phone call while on board
- ❯ Limited eating on-board policy
- ❯ Back-door boarding only

Generally, most measures are considered useful in the event of new pandemic, while not to be implemented outside of a sanitary crisis situation.

Opportunity of maintaining crisis measures

SOCIAL DISTANCING MEASURES	% of respondents declaring the measure would be done again in case of new pandemic	% of respondents declaring the measure would be implemented in the long term
Compulsory mask wearing	100%	39%
Distribution of facial mask for staff	97%	37%
Social distancing: plexiglass screen to isolate driving cab in busses	85%	68%
Social distancing: busses front door not usable for passengers, «back-door boarding» only	60%	8%
Stop selling tickets on board	64%	36%
Social distancing: use one seat out of two	76%	7%
Social distancing: one-way passengers flows with signage	70%	32%
Social distancing: ground stickers to identify standing positions in queuing areas, waiting areas or onboard vehicles	74%	36%
End of on-site ticket distribution	17%	11%
Distribution of facial masks for passengers or through vending machines	41%	9%
No phone call while on board	33%	22%
No (/ limited) eating while on board	83%	56%
Questionnaire to passengers on their health condition	13%	0%
Staff's temperature checks	NS	6%

© Ketut Subiyanto

Not surprisingly, compulsory mask wearing and distribution of facial mask for staff do overwhelmingly score the best when it comes to implementing them again in the event of a new pandemic (respectively 100% and 97%). However, the level of respondents (more than one third) thinking that the implementation of these measures should be part of a "New normal" was less expected.

As for the "use one seat out of two" policy, while 76% of respondents say that it should be implemented again in case of a new pandemic, only 7% of them share the opinion that this should be kept in the long run.

Two measures seem to be the exceptions that make the rule: **the introduction of plexiglass screen to isolate driving cab in busses and the prohibition/restriction of eating on board score well** when implemented in the event of a new crisis (85% and 83%) as well as in the long run (68% and 56%), possibly linked with the limited investment required to extend these measures in the long term.

C. COMMUNICATION

Assessment of the effectiveness of current measures
Communication measures have generally proven to be largely implemented.

COMMUNICATION	Implementation rate among the networks	Effectiveness to WBP (1 to 5)	Cost-benefit rating (1 to 5)
• Communication about new travelling rules	100%	4.2	4.1
• Public communication that has the purpose of disproving the train as a dangerous place regarding infections			
• Resume message of the train representing a sustainable choice			
• Development of staff "host role" with increased focus on the customers and their needs	45% - 65%	3.2 – 3.5	3.4
• Use of testimonials ("ambassadors") that point out that public transport is safe			
• Communication partnerships: Cooperation with tourist organisations	28%	2.8	2.6

Communicating about the new traveling rules, which has been done by all respondents, has received the highest cost/benefit rate. **This type of communication campaign demonstrates public transport operators and authorities' commitment to limit the spreading of the virus** and helps increase passengers confidence.

A vast majority of respondents (65%) have also communicated massively about the fact that **public transport is safe**. This measure is perceived as useful to regain passengers' trust.

Generally, the effectiveness score is similar to the cost-benefit rating score, this is largely linked to the limited resources involved.

Other measures such as the development of **staff "host role"** and the set-up of **communication partnerships** with other sectors (mainly tourist organisations) **appear less effective**. Regarding possible partnerships with tourist organisations, such initiatives might not be the top priority of public transport networks as business and leisure travels are still limited.

Opportunity of maintaining crisis measures

COMMUNICATION	% of respondents declaring the measure would be done again in case of new pandemic	% of respondents declaring the measure would be implemented in the long term
Communication about new travelling rules	100%	76%
Public communication that has the purpose of disproving the train as a dangerous place regarding infections	87%	54%
Resume message of the train representing a sustainable choice	85%	80%
Development of staff "host role" with increased focus on the customers and their needs	80%	70%
Use of testimonials ("ambassadors") that point out that public transport is safe	75%	40%
Communication partnerships: Cooperation with tourist organisations	61%	44%

Compared to the previous types of initiatives, communication measures would be praised in case of new pandemic, or even in the long run (see table below).

Not surprisingly, **more than 85% of respondents would conduct similar communication campaigns in the event of a new pandemic**, with, in the top 3 of most effective measures, the communication about new traveling rules, about the fact that public transport is safe and that it is a sustainable choice.

The development of staff host role, the use of testimonials and partnerships with tourist organisations score well when it is about implementing them in the event of a new crisis, and even in the long run. While not much implemented at the peak of the pandemic, likely due to a lack of time or resources, these measures seem interesting to test in the future.

D. TRANSPORT OFFER & MANAGEMENT OF TRAVEL DEMAND

Assessment of the effectiveness of current measures

TRANSPORT OFFER & MANAGEMENT OF TRAVEL DEMAND	Implementation rate among the networks	Effectiveness to WBP (1 to 5)	Cost-benefit rating (1 to 5)
Increase transport offer / keep the pre-COVID service level despite lower demand	73%	3.9	2.5
Communication campaign to encourage passengers to travel off-peak	62%	3.3	3.3
Changing transportation offer with the introduction of regulation measures (such as short loop), or skipping stop measures (changing stopping patterns on the line)	30%	2.7	2.4
Incentives for employers to introduce flexible start and finish times for their workforce (e.g. early bird ticket offer, group discount for businesses that agree to implement flexible working)	6%	2.0	2.8
Partnerships with universities to enable students avoid traveling during peak hours	12%	2.2	2.3
Introduction of mandatory seat reservation	3%	2.3	1.8
Reduction of off-peak ticket price	3%	2.2	2.0

Almost 3 respondents out of 4 have increased their transport offer or kept the pre-COVID level despite lower demand; because it directly helps allowing social distancing, this measure is seen as the most effective to make passengers feel safe in public transport (effectiveness rate of 3.9 out of 5). However, it comes naturally that cost-benefit rating for this measure is quite low (2.5 out of 5), due to the significant cost of such a measure. This demonstrates the public sector's engagement in tackling the pandemic.

In conjunction, less than a third of the networks have implemented changes in transportation offer with the introduction of regulation measures such as short loop or skipping stop measures (changing stopping patterns on the line). These

measures are assessed as moderately effective to win back passengers, with a medium cost-benefit assessment. From an operational perspective, such changes that modify well-established transportation patterns are poorly appreciated by passengers.

More than 2 networks out of 3 (62%) have implemented a communication campaign to encourage passengers to travel off-peak. This measure is assessed quite positively on both its effectiveness and its cost-benefit (3.3 out of 5).

It is interesting to note that among measures aiming at flattening the demand curve, only the communication-based measure has emerged. Very little has been implemented when it comes to agreements with employers or universities to flexible start and finish times (implemented by about 10% of the respondents, with a perceived low effectiveness), introduction of mandatory seat reservation and reduction of off-peak ticket price were almost not implemented.

When it comes to the reduction of off-peak ticket prices, they may be challenging to implement and to enforce. However, in the frame of digitalisation of ticketing activities, one respondent draws attention on the opportunities made available for tailor-made fare policy, such as e-wallet coupled with time-stamping system.

Opportunity of maintaining crisis measures

TRANSPORT OFFER & MANAGE TRAVEL DEMAND TO EASE THE PASSENGER LOADS	% of respondents declaring the measure would be done again in case of new pandemic	% of respondents declaring the measure would be implemented in the long term
Increase transport offer / keep the pre-COVID service level despite lower demand	79%	45%
Changing transportation offer with the introduction of regulation measures (such as short loop), or skipping stop measures (changing stopping patterns on the line)	56%	19%
Communication campaign to encourage passengers to travel off-peak	84%	79%

Communicating to encourage passengers to travel off peak would be reconducted by about 84% of respondents in the event of a new pandemic and also in the long run (79%).

Still consistently with the effectiveness of this measure, in the event of a new pandemic, a large majority of respondents (79%) would increase again their transport offer or keep the normal level despite a lower demand. However, despite considerable extra costs, 45% of them suggest keeping this offer on the long run.

Beyond the figures exposed in the table above, **there seems to be an interest to experiment some measures that have been very little implemented**, namely agreements with universities or employers to encourage passengers to travel off-peak and incentives for employers to introduce flexible start and finish times.

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E. FARE POLICY

Assessment of the effectiveness of current measures

FARE POLICY	Implementation rate among the networks	Effectiveness to WBP (1 to 5)	Cost-benefit rating (1 to 5)
Free tickets to certain category of passengers, e.g. essential workers, hospital staff, young people	27%	2,4	2.1
Foster integrated ticketing in a multimodal approach	24%	2,8	2,8
Launch of loyalty concept	21%	2,9	2,6
Public transport tickets coupled with special event ticketing system	15%	2.2	2.3
System (app) introducing post-commute fare optimisation : passengers will benefit from the best fare according to their actual number of trips / given period	15%	2,9	2,9
Reduced ticket prices	9%	1,5	1,7
Abolishment of Business Class	0%	1,1	1,2

Fare policy is not the preferred tool to tackle the effect of the pandemic. The most implemented measures (roughly 1 respondent out of 4) refer either to the promotion of integrated ticketing in a multimodal approach, or to the gratuity granted to certain category of passengers (such as essential workers including health professionals)[5]. This latest measure demonstrates (if needed be) **the social and financial inclusiveness of public transport in citizens' live**.

Reduced ticket prices are poorly considered to win back passengers; public transport is yet an affordable mobility public transport, the price of the ticket paid by the passenger covers between one third and a half of the cost of the transport (pre-COVID level).

Conversely, the effectiveness and cost-benefit assessments for each measure are low, the best rated measures barely reached the average rate (2.5 out of 5). Respondents have shown **interest for post-commute fare optimisation and the launch of loyalty concept**, which assessments score the highest, as well as **the development of integrated ticketing in a multimodal approach**. These fare policy measures fall within the frame of the **digitalisation of public transport**, which is a strong underlying trend for the sector.

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5 One respondent mentioned that the access to sweep trains was granted to essential workers, even though these specific trains are usually not used for revenue service. This operating practice might be challenging to duplicate in other networks; however this illustrates the wide variety of initiatives taken by public transport during the pandemic.

F. INNOVATIVE TOOLS

Assessment of the effectiveness of current measures

INNOVATIVE TOOLS	Implementation rate among the networks	Effectiveness to WBP (1 to 5)	Cost-benefit rating (1 to 5)
Online pre-payment of tickets, weekly/monthly pass	71%	3.4	3.2
Organisation of passenger flows via apps that indicate the level of occupancy by coach and time of the day: real-time crowding information	52%	3.7	2.9
Introduction of electronic wallet: pay as you go	41%	3.4	3.2
Contactless stop buttons on-board busses (hologramme)	10%	3.1	2.6

Innovative tools are seen as effective and cost-effective measures to help win back passengers, even though there is no "silver bullet" measure identified. Online pre-payment of tickets & weekly or monthly pass, apps that help organise passenger flows or electronic wallet were used quite frequently during the pandemic, even though these set of measures was yet implemented during the pre-pandemic period , as spontaneously confirmed by some members. We may consider that the Covid-crisis context has accelerated the deployment of such measures. This analysis is consistent with the appetite expressed by respondents to the implementation of such measures on the long run, all measures (apart from the contactless stop buttons on-board busses) scoring above 80% considering their implementation in case of new pandemic, or in the long term (see next table below)

One additional point is worth being mentioned regarding the "passenger flows indication" apps. Its effectiveness to win back passengers is quite high (3.7 out of 5), however its cost-benefit analysis is undermined (2.9 out of 5), probably due to the deterrent implementation costs.

One respondent mentioned the implementation of a bus occupancy control system restricted to the operator's staff only. Such a system can be considered as an intermediate, cost-saving stage prior to the deployment of a fully fledge real-time occupancy monitoring system available through anyone's smartphone app.

Opportunity of maintaining crisis measures

INNOVATIVE TOOLS	% of respondents declaring the measure would be done again in case of new pandemic	% of respondents declaring the measure would be implemented in the long term
Online pre-payment of tickets, weekly/monthly pass	89%	95%
Organisation of passenger flows via apps that indicate the level of occupancy by coach and time of the day: real-time crowding information	84%	90%
Introduction of electronic wallet: pay as you go	82%	94%

B. THE FINANCING SOURCES

FINANCING SOURCES	Implementation rate among the networks
Increase of ticket price	6%
Subsidies from local authorities	81%
COVID-19 special state aid	86%

It is especially interesting to note that, contrary to other economic sectors, **the public transport sector has made little if no use of an increase of the price of the service to their customers**. Again here, **the « Guardians of mobility » play their role as keepers of essential services for the mobility of people.**

Consequently, the sector has made **great use of financial support coming from local authorities (81%) and from the European Union's special COVID framework for state aid.** Since its implementation in March 2020, more than 15 Member States have made use of the special COVID state aid framework to support the public transport sector.

C. THE PODIUM : THE TOP MEASURES IDENTIFIED TO WIN BACK PASSENGERS IN A POST-COVID CONTEXT

The table below ranks the top-measures identified by respondents as most relevant to win back passengers, in a post-covid context.

Ranking	Top measures identified to win back passengers in a post-covid context
1	Accelerate digitalisation of the public transport sector (ticketing, MaaS, contacless payment, etc)
2	Improve cleaning operation (innovative cleaning tools, staff onsite,…)
3	Communication towards passengers (public transport is safe, Communication campaigns, etc.)
4	Stronger role of the public transport sector in the National/European decision-making process regarding post-covid measures (sanitary pass, capacity restrictions, mandatory mask wearing, etc.)
5	Promote modal shift & discourage solo-car use (UVARs, SUMPs, etc.)
6	Price incentives
7	Develop partnerships (with schools, enterprises) or between operators in a multimodal approach
8	Long-term measures to flatten the peak
9	Easier access to the EU Funds (for innovation, infrastructures projects, clean busses, etc.)

This highlights the following:

Three measures clearly stand out from the others assessed:

❯ **Digitalisation of the public transport sector** appears as the most relevant measure; this underlying trend, which implementation has started several years ago, will be a key-factor for a successful recovery of passenger attendance. Contactless operations, better real-time information & new ticketing opportunities in a multimodal environment will be key.

- The podium is complemented by two well-appreciated measures, namely **communication towards passengers and improvement of cleaning operations**, who have demonstrated their effectiveness during the crisis, and will be part of the "New normal". Besides, it is expected that this pandemic will improve cleaning standards in the future[6].

- These three most popular measures are at public transport operators and authorities' hands, and firmly anchored in their core business activities. **In other words, the sector, provided there is still local and European financial support, is ready to take its share of the burden to win back passengers.**

- Conversely, measures that involve third-parties (partnerships with schools, enterprises or between operators) are less considered.

❯ Public transport sector could however seek support to **promote modal shift** and discourage solo-car use, and to **strengthen its positions in the decision-making process** at national and European level.

❯ Price incentives is one of the less favored measure to win back passengers. This is consistent with the detailed analysis of fare policy measures, as exposed previously.

❯ Easier access to the EU Funds (for innovation, infrastructures projects, clean busses, etc.) scores rather poorly, even if we put aside non-EU respondents from the analysis. This is likely due to **the difficulty in accessing EU funds for small and medium networks**, especially operators which represent the large majority of contributors to this report.

6 See also here UITP's report Adopting long-term strategies for cleaning and disinfection of public transport systems

II. SUGGESTIONS FOR THE "NEW NORMAL"

This unprecedent sanitary crisis, while highlighting the key role of transport for the everyday life of people, has forced the sector to innovate and implement measures almost from one day to the other. As showed by the implementation rate of most crisis measures described above, **public transport operators and authorities have taken the challenge and "done the job" of ensuring the mobility of millions of people**.

When it comes to assessing the effectiveness and the cost-benefit rating of the measures implemented, respondents give **overall positive feedback.** In case of new pandemic, these measures would likely be implemented again.

Crisis measures, however, are not made for lasting forever, in particular due to their high implementation costs. Interestingly though, the results of this survey show that the public transport sector is in favour of implementing some of the measures in the long run. This is particularly the case for communication campaigns, the use of digitalisation tools, increased cleaning of facilities and rolling stock.

Some results may be surprising. About one third of respondents said they would be in favour of the mandatory mask wearing in the long term. A trade-off between a mandatory use and a voluntary use of facial mask could be considered. The public transport sector definitely needs to be involved in any European or national decision-making process regarding sanitary precautions.

Also, a large majority of respondents (3 out of 4) is in favour of keeping high level of transport offer despite lower demand. Though this allows for social distancing, and thereby for winning back passenger in the short and medium term, keeping this measure represents high operational costs and would need financial support.

Besides, a majority of respondents would conduct communication campaigns about the fact that public transport is a sustainable choice. **With this, public transport operators and authorities look beyond the COVID-19 crisis, back on tracks with the Green Deal objectives of the Smart and Sustainable Mobility Strategy**.

It is also worth mentioning that there is an interest to test some measures that have been very little implemented, likely due to a lack of time and resources at the peak of the pandemic:

- ❯ agreements with universities or employers to encourage passengers to travel off-peak and incentives for employers to introduce flexible start and finish times.

- ❯ development of staff host role, the use of testimonials and communication partnerships with tourist organisations

Last but not least, the sector has made **great use of financial support** coming from local authorities and from the European Union's special COVID framework for state aid. This has allowed for keeping the ticket price at the same level as before COVID. If crisis measures are to be implemented in the long run, such local and European financial support will remain essential in the New normal in order to not let passengers pay the price of safety measures.

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CONCLUSIONS

Urban mobility is changing, substantively, and fast. **Public transport is at a turning point**. While, in the past 18 months, it has shown to be essential to the society, **it faces many challenges**: the co-existence with other modes, incl. micro-mobility, competing for passengers and urban space, an increasing number of environmental legal requirements, a dramatic loss of passengers since the COVID outbreak leading to huge losses in revenues...

Public transport has a key role to play for greening mobility, which is at the heart of the action of the European Union. With its large passenger capacities, mass public transport is indeed the backbone of sustainable and safe mobility in any European city. This report shows the sector's willingness and ability to react quickly to challenges, even the least expected ones. However, to continue ensuring its role as "Guardians of mobility" and achieve the modal shift objectives, **it needs support.**

Any European initiative related to urban mobility should place public transport at the forefront, enabling it to achieve its maximum potential[7]. In the particular context of winning back passengers, European communication campaigns may help, as well as a European year dedicated to public transport.

Investments into sustainable public transport have a multiplier effect in the local economy exceeding five times the initial expenditure rate. Under the 2014-2020 EU budget (MFF), local public transport was successfully support by a number of programmes and mechanisms, including the structural funds or the CEF-Transport. For the 2021-2027 programming period, UITP and its European members have been actively urging the Commission to increase investing in the local public transport services, mobile assets and resilient infrastructures. Substantial EU financing and grants remain critical if we want to effectively address the Green Deal objectives and regain passenger trust post-lockdown.

The EU can also support the public transport sector's resilience towards future disruptive events through research and deployment of new hygiene concepts, more flexible operations, automation, and a different engagement with customers.

Public transport needs legal security. UITP has for instance strongly argued for the PSO Regulation 1370/2007 to remain unchanged following its recent revision in 2016 to ensure legal certainty and regulatory stability.

Public transport has to be given an active role in all decision-making processes impacting their services. At local level, it requires a competent local transport authority setting the framework conditions in a way that the overall mobility system is improved.

UITP stands clear to continue voicing the proposals and concerns of the public transport sector at European, and international level to make the transition to the New normal a success for public transport.

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7 UITP has recently launched a communication campaign on the benefits of public transport, see: https://ptbenefits.uitp.org/pt-benefits/public-transport-benefits/

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