

SGN

DEL

BLR

HKG

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SGP

TYO

JKT

NYC

MNL

BOS

LON

Urban Mobility 2020

UNLOCKING THE GLOBAL COMMUTING CONUNDRUM

Kadence 
International

 urban
mobility

Global Themes.

URBAN MOBILITY



Pull factors

Push factors

TIME IS PRECIOUS

Mainly this means 'not wasting time', i.e. being able to use time more efficiently, and getting to work quickly; timeliness is also implied, e.g. 'not being late' for work.

COMFORT IS NOT A LUXURY, IT'S A DEMAND

How to get to work comfortably is important everywhere, but expectations are low. This often simply means getting a seat or not feeling crowded out.

COST SAVING IS MOTIVATIONAL

How to get to work as economically as possible is a top choice factor.

CONVENIENCE IS ADDED VALUE, NOT THE STAR OF THE SHOW

Travelling as easily and as hassle free as possible is not often the most important factor in commuter decision making; but convenience does have a footprint over other motivations, e.g. saving time.

SAFETY IS AN EVER PRESENT CONCERN

Often people are still occupied with getting to their destinations as safely as possible, especially on the roads, but also in crowded public transport; will choose modes of transport that are more expensive but safe.

POOR HYGIENE & POLLUTION DOWNGRADE EXPERIENCES

People will actively avoid environments that are unhygienic or polluted if they can, even at the expense of time and money.

WEATHER CAN MAKE OR BREAK A DAY – RAIN OR SHINE

Strong factor in determining how people feel about their commute; whether it's easy or challenging, comfortable or uncomfortable, happy or stressful – both a push and a pull factor.

ETIQUETTE CAN PROFOUNDLY IMPACT MOOD, RUDENESS RUINS A DAY

Driving etiquette, passenger etiquette (umbrellas, high heels), walking etiquette (mobile phones, random stopping) – whichever mode people take, there is always an element of 'stress' or stressful behaviour that can disrupt journeys and impact people's mood, and even their whole day.

The Urban Mobility Diary.

DIARY TASKS



1 study



Across **11** cities



169 responses



Over **3** days



54 train journeys



10 online ride hailing journeys



46 metro journeys



9 jeepney rides



45 walks



8 mini bus/van rides



39 bus journeys



5 tricycle rides



29 car journeys



4 bicycle rides



18 motorbike/scooter journeys



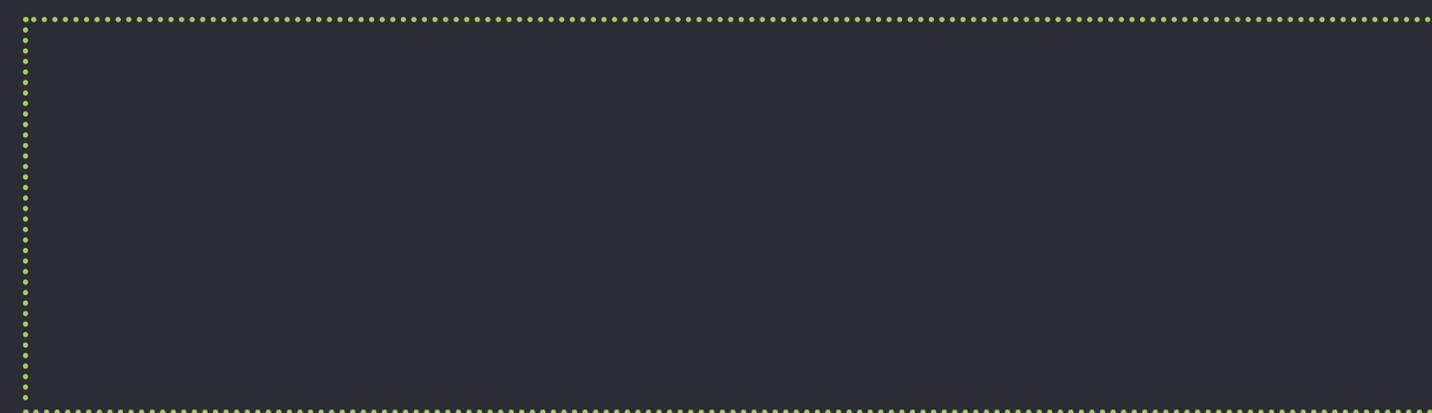
3 carpool rides



SELECT A CITY



THIS IS AN INTERACTIVE PDF. OPEN IT IN ADOBE ACROBAT READER TO USE THE INTERACTIVE FUNCTIONS. SELECT OR HOVER OVER SECTIONS MARKED WITH THIS SYMBOL.



Tokyo.

The Japanese rail network was originally built for 5 million people but now carries on average 20 million people per day.



TYO

TRIP DETAIL

Route: From home to office, directly (few changes)

Prevalent trip mode(s): Mainly train, or metro, or walking

Average trip duration: 30 mins

Activities undertaken on commute

- Listening to music (with/without smartphone)
- Playing phone games (e.g. Pokemon Go), messaging friends and family
- Reading a book
- Checking/sending e-mails & social media

Top factors influencing travel choices

- Saving time
- Saving money
- Comfort

Top plus points of journey

- Listening to music/watching TV
- Quiet journey (train)
- Fresh air (walking)

Top pain points of journey

- Crowded carriages/too many people
- Long delays (trains)
- Confusing interchanges at busy stations

Improvements to journey

- **Comfort & Safety:** Reduce crowds; use more train carriages and streamline footfall at entrances and exits
- **Speed:** Reduce delays
- **Convenience:** Improve methods and types of payment

Delays and crowding. They made me exhausted, even in the morning.



Normally I take the 'women only car' on the train, but today I just ran onto the nearest car. It was crowded and being pushed by men was really uncomfortable.



It...(Metro)... is crowded most normal workdays, and I wonder what would happen if there's a special occasion or disaster? Would people be able to get out in time to save themselves?



I use the subway (Tokyo Metro), currently they do not have a system to pay via your smartphone which is a hassle. Because I have to take out my subway pass every time I enter and exit the subway.



Singapore.

Car ownership in Singapore has decreased by 4% in the last year where it costs on average US\$115,000 to own one.



SGP

TRIP DETAIL

Route: Multi-modal - many people make changes
Prevalent trip mode(s): Mainly bus and/or train
Average trip duration: 45 mins

Activities undertaken on commute

- Catch up with friends/social media
- Check work e-mails
- Listen to music/podcasts
- Shop/play games on phone

Top factors influencing travel choices

- Saving time – number 1 priority
- Comfort
- Saving money

Top plus points of journey

- Comfort: getting a seat/less crowding
- Quiet journey/silence (train)
- Air conditioning

Top pain points of journey

- Irregularity/unreliability of the buses
- Slowness of the trains
- Overcrowding
- Inaccurate/confusing app information

Improvements to journey

- **Info/Tech:** Improved bus scheduling and more accurate travel information with alerts showing next arrival time at stops
- **Speed:** Faster and more reliable train services
- **Comfort:** Seats for everyone/less crowding with more frequent services

I go direct to work... (stopping to pick up a coffee on the way of course :))



There's this train station, Paya Lebar where the crowd eases off as it's a big exchange station. All of a sudden there's more room to breathe!



The regularity of bus timing: it comes at an approximate time, rather than an absolute one.



I'd like trains that are more predictable and don't break down so often, don't stop in the middle of nowhere playing announcements that don't make sense.



Manila.

Transport official Francis Tolentino missed a live TV interview because he was stuck in traffic on EDSA, the ring road around Manila.

TRIP DETAIL

Route: Multi-modal journeys, often 3-4 modes, by road

Prevalent trip mode(s): Jeep, utility/public van, car pooling/ride hailing

Average trip duration: 180 mins

Activities undertaken on commute

- Watch Netflix downloads
- Play games/listen to music
- Sleep
- Read e-mails, send SMS/messages

Top factors influencing travel choices

- Cost saving (multi-modal is expensive)
- Safety – from thieves and robbers
- Comfort – journeys are long and multi-modal can be a challenge every day



MNL

Top plus points of journey

- Chatting to drivers/fellow passengers
- Watching movies/listening to music
- Sleeping (journeys are often long and start early)

Top pain points of journey

- Traffic congestion
- Overcrowding
- Hygiene/pollution

Improvements to journey

- **Speed/Comfort/Safety:** Cars – improve congestion, traffic planning and road infrastructure
- **Speed/Comfort:** Trains - more carriages, fewer delays
- **Hygiene:** Buses - disinfect old buses/new ones
- **Comfort/Safety:** Public vans – control overcrowding

Traffic is always bad. It impacts badly on my energy to go to work and the time spent for family.



I get to talk to the driver about his background, why he prefers driving a Grab Car vs. driving a Cab. We also talk about family and which province or island they are from - usually people in Manila are from the provinces and have colourful stories on why they migrated here.



The smell of garbage and bad breath in the morning. It is difficult to breathe. In the evening, most buses would have baby cockroaches crawling on the side. This is why I don't sit on the window side.



Public vans - if van seats 10, it should not seat 20...



Delhi.

10-12 people are killed everyday on trains journeys in India, and some railway stations even have their own undertakers.



DEL

TRIP DETAIL

Route: From home to office directly, no stops
Prevalent trip mode(s): Mainly car, then bus or metro
Average trip duration: 45 mins

Activities undertaken on commute

- Listening to music (in car or on train)

Top factors influencing travel choices

- Saving time
- Comfort
- Saving money

Top plus points of journey

- Listening to music/tuning out
- Socialising with friends and family

Top pain points of journey

- Traffic
- Bad driving

Improvements to journey

- **Speed:** Improve traffic flows
- **Safety:** Improve driving skills
- **Comforty/Speed:** Advanced/technological public transport system

While travelling with my son, he keeps asking me questions and I will be answering. That is more enjoyable. Listening music.



It would be great if there was more discipline on the roads.



Haphazard traffic!
Vehicles coming from the wrong direction.
Wrong overtaking by vehicles.



London.

With massive over-crowding on London's public transport services, commuters have started to use the Emirates Air Line Cable Car as a way to get to work.



LON

TRIP DETAIL

Route: Mostly multi-modal journeys

Prevalent trip mode(s): Train, walk, tube

Average trip duration: 55 mins

Activities undertaken on commute

- Listening to music
- Reading (books/papers/magazines)
- Social media/messaging friends/family
- Catching up with work e-mail

Top factors influencing travel choices

- Comfort
- Saving money/watching the cost
- Saving time/being on time
- Quick journey/speed

Top plus points of journey

- Getting a seat – top priority
- Walking/getting fresh air/enjoying sun
- Looking out window
- Listening to music

Top pain points of journey

- Massive over-crowding
- Almost daily delays & disruptions
- Stress & anxiety

Improvements to journey

- Reliability and frequency of services
- Less people / more personal space
- Getting a seat
- Better connections

Northern Line is usually very busy in the mornings so it's hard to get on the tube at Clapham North. This is tricky as it makes my commute unpredictable (sometimes I can get on the first tube, other times I have to wait for up to 5 tubes until I can get on). I typically get on the 3rd tube in the mornings.



The bus was too crowded and I couldn't reach the stopping button easily. I was thinking having a service like this on my smartphone that would allow me to press the stopping button wherever I am.



Walking to the train station from home. Enjoying the fresh air, music and being alone with my thoughts.



The trains were delayed so I had to monitor the live departures even before leaving the house, to make sure I could get a train to arrive on time. With that, the uncertainty that the train delays might cause overcrowding (and not able to board a train).



Jakarta.

In Jakarta it is often cheaper to take a taxi to work every single day than to own your own car.



JKT

TRIP DETAIL

Route: Mix of multimodal and direct routes

Prevalent trip mode(s): Motorbikes & train, ride hailing

Average trip duration: 80 mins

Activities undertaken on commute

- Focusing on driving safely
- Listening to music/watching movies
- Catching up with social media/e-mails/messaging/news
- Sleeping

Top factors influencing travel choices

- Saving money
- Saving time
- Comfort
- Safety

Top plus points of journey

- Light traffic/no jams (e.g. special holidays = rare)
- Using time to do other things
- Enjoying not driving

Top pain points of journey

- Traffic jams (every day)
- Crowded trains & buses
- Hail-a-ride drivers who are not knowledgeable

Improvements to journey

- **Speed:** Ease road traffic
- **Convenience:** Provide more options for public transport
- **Info/Tech:** Better real time traffic and congestion updates via apps

Driver didn't want / didn't know how to use GPS, therefore I need to use my own GPS and pay attention more to the roads taken.



The most enjoyable by taking motorcycle to office is it is practical and saving time than use car. So I can go to office with only around 8 minutes.



Commuting with public transport is not enjoyable in Jakarta. At least I still can use my phone for killing time while commuting.



I hope there is a different track for motorcycle and car since it makes me feel afraid when the motorcycle rider is like a 'king of the road' and annoy another vehicle.



Hong Kong.

Hong Kong is one of the richest cities in the world. It has more Rolls Royce's per person than any other city in the world.



HKG

TRIP DETAIL

Route: Involves 1 or 2 stops

Prevalent trip mode(s): Mini vans, metro, walk

Average trip duration: 40 mins

Activities undertaken on commute

- Read a book
- Listen to music
- Sleep

Top factors influencing travel choices

- Timeliness, speed of journey
- Saving money
- Convenience

Top plus points of journey

- Walking in the sunshine
- Getting a seat on the bus

Top pain points of journey

- Overcrowding
- Stressed out people
- Traffic jams

Improvements to journey

- **Speed/Comfort** Ease overcrowding on the metro, more frequent services and more carriages
- **Speed:** Ease traffic congestion
- **Flexibility:** First and last mile solutions – mini buses arriving on time

As usual, too many people in the MTR after Admiralty station, and also in the Wanchai station when I arrive.



*Some traffic jams.
The mini bus did not come on time.*



*I have to take a mini bus to the metro. There are traffic jams when I am in the mini bus.
Improve the traffic!*



Ho Chi Minh City.

In Ho Chi Minh City the two-wheel mobility culture has contributed to a disconnected form of sprawl, known as leap-frog development.



SGN

TRIP DETAIL

Route: Direct route to work, by road

Prevalent trip mode(s): Motorbike/scooter

Average trip duration: 25 mins

Activities undertaken on commute

- Concentrate on driving
- Listen to music
- Reflect on the day/life in general

Top factors influencing travel choices

- Saving time & speed of journey
- Comfort & convenience
- Saving money

Top plus points of journey

- Light traffic on roads
- Dry & cooler temperatures
- Flexibility, convenience of driving self

Top pain points of journey

- Traffic jams, too many people
- Hot weather and/or rain
- Air quality / pollution

Improvements to journey

- **Speed/Comfort:** Ease road traffic
- **Safety:** Promote better driving skills
- **Flexibility:** Encourage use of public transport

Just 15mins to ride straight from my home to the office without many stops of traffic light (only 1). Also, I can control the speed by myself and keep me safe.

The traffic jams and some people ride like crazy without rules. Also, the environment is more polluted with smoke because of traffic. And there are a lot of noises, especially the horn noise.

Reduce vehicles on the street by using public transportation.

Boston.

About 13% of Boston citizens commute by foot, giving it the highest percentage of pedestrian commuters in all major cities of the United States.



BOS

TRIP DETAIL

Route: 1 to 2 stops; walking features, as do breakfast and coffee stops

Prevalent trip mode(s): Train, subway & walk

Average trip duration: 40 mins

Activities undertaken on commute

- Reading (most people do this)
- Listening to music/podcasts
- Catching up with work e-mails/slack
- Playing games, checking social media

Top factors influencing travel choices

- Saving time and being on time
- Travelling comfortably and conveniently
- Saving money

Top plus points of journey

- Walking, getting exercise and fresh air
- Being able to read on the journey
- Getting a seat
- Getting out of a crowded train

Top pain points of journey

- Overcrowding
- Delays & unreliability (buses and trains)
- Rain/the weather

Improvements to journey

- Increase frequency & reliability of public transport
- Create larger capacity vehicles to carry more people
- Integrated, online payment systems
- Wider, covered sidewalks

Every Morning I stop at a deli and get a coffee from a little shop owned by Mike and Emilio. I pay on Monday for the entire week and they let me skip the line. They are the happiest guys and it really starts my day off right.



This morning I was able to get a seat on my train, even though the ride is very short (5) minutes, it just makes it more comfortable and easy to read the newspaper.



Idealistically, I wish we could just add money to our card using an online app from our phones.



I hate the C line, it is incredibly crowded and most times I am one of the last ones able to get on the train at all. I consider it a very good day if I can get a seat (this almost never happens). It is very uncomfortable and challenging to have other peoples body weights on you and it being so crowded you can't even move.





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