The customer experience of urban travel

How people choose to travel and how it makes them feel
Introduction

Reimagining the travel experience

Around the world, cities are reaching their traffic capacity. City planners are looking for ways to make cities greener, safer, less congested, less polluted and more livable.

Urban mobility is a key differentiator for competitiveness. Cities that keep moving have a more vibrant economy and attract more inward investment. They’re more attractive places to live and work.

Technology and improved infrastructure play a huge role in shaping mobility – but the biggest factor in improving urban travel is human behavior.

Some people don’t have a choice of how to get around their city. They have to use whatever mode of transport is available and affordable to them – customer experience and personal preference have nothing to do with it.

For anyone who does have the option to choose, though, the transportation experience has a major influence on their decision about what mode of transport to use, when and how.

For transport authorities and city planners, one thing is clear: we need to think about engineering the customer experience and providing informed decision-making just as much as we need to engineer technology and infrastructures.

This research report is about the customer experience of urban travel. We’ll look at the elements that make up the experience, and examine which of those need the primary attention of transport planners looking to change travel behavior.

In our survey, we took a people-centric view of transportation, asking some important questions:

- What makes people embrace public transport?
- Why do people get frustrated with it?
- How do people’s expectations and experiences differ across the world and across different modes of transport?

We then asked transportation experts to look at the data and suggest solutions that can increase ridership for public transportation and/or lessen the strain of high traffic volumes and lengthy commutes on our cities.

At Conduent, we’ve been working to improve urban mobility for over 30 years by figuring out what’s possible. By applying the customer experience perspective to our first global transportation survey, we hope to factor what people want into conversations about what cities need.
Conduent Global Transportation Survey at a glance

An online survey was conducted amongst 18-65 year-olds who hold a driver’s license in 23 cities across 15 countries, to gather details on the emotions they have when commuting and traveling in their city and about their habits, needs, perceptions, and expectations – and looked at the findings through a customer experience lens.

18-65 years old
23 cities
15 countries

Amsterdam
Austin
Brussels
Frankfurt
Kuala Lumpur
Lima
London
Los Angeles
Madrid
Melbourne
México City
Milan
Montréal
New York
Paris
Philadelphia
Portland
San Francisco
Santiago
Singapore City
Sydney
Toronto
Washington DC
Chapter 1

How do people choose a mode of transport?
When it comes to choosing a mode of transport, there are no universals.

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Every city is different and our survey data shows huge variations based on infrastructure, availability, culture, and demographics:

In Singapore, with limited space and policies that discourage car use, only 52% of survey respondents drive a car* in and around their city at least one day a month.

In the US, by contrast, with no shortage of space, excellent infrastructure and low gas prices, 84% of respondents say they drive a car in and around their city at least one day once a month.

* In this report, “drive a car” refers to driving a car that isn’t part of a car scheme.

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Singapore’s car-light policy

Look behind the numbers and you’ll see why car usage is so low in Singapore. As part of an effort to reduce the number of cars, all drivers have to bid at auction on a Certificate of Entitlement which allows them to use a car for 10 years, after which it has to be scrapped. Supply and demand causes the price of the COE to fluctuate, so car prices (which include the COE) are high and can often increase dramatically, with a Hyundai in Singapore costing more than an Aston Martin in the UK.
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Comfort comes first

It’s obvious, then, that what works in one city won’t necessarily work in another. But if we drill down into some of this data, we can find some universals in human behavior:

Take driving: the majority of those who drive – across the board – choose their car because it’s the most comfortable option.

At the same time, driving is the mode of transport most associated with frequent delays.

Of the 80% of respondents who drive in and around their city at least one day per month:

- 7 out of 10 experience delays at least one day a month
- 10% experience delays 6-7 days per week

Mode of transport used at least monthly

<table>
<thead>
<tr>
<th>Mode of transport</th>
<th>Top reason for choosing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driving (not via a car-sharing scheme)</td>
<td>Comfort</td>
</tr>
<tr>
<td>Use of own bicycle</td>
<td>Speed, Ease of access (e.g. proximity to my home),</td>
</tr>
<tr>
<td>Underground metro</td>
<td>Most environmentally friendly, Price/cost</td>
</tr>
<tr>
<td>Car sharing (with friends, family or colleagues)</td>
<td></td>
</tr>
<tr>
<td>Powered two-wheeler</td>
<td></td>
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<tr>
<td>Taxi (requested via an app)</td>
<td></td>
</tr>
<tr>
<td>Car sharing (via a scheme)</td>
<td></td>
</tr>
<tr>
<td>Train</td>
<td></td>
</tr>
<tr>
<td>Taxi (conventional)</td>
<td></td>
</tr>
</tbody>
</table>
So, even though...

61% of those who experience delays at least weekly say this causes them to spend less time with their family and friends, and

51% say this can cause them to arrive late to work

...they continue to drive. It's clear then, that people's choice of transportation isn't necessarily rational. Making a different or better trade-off between travel comfort and time with family is prompted by habit and convenience (what behavioral scientist Richard Thaler and Cass Sunstein – the authors of *Nudge* – call "mindless choosing": it's easy to choose what's available and what you're used to – it's much harder to make people change their default).

**The comfort zone**

‘Comfort’ is a part of rational decision making. It isn't as firm an attribute as price, travel time, or availability, but it is a big part of choosing a transport mode.

The reality is that most of us take so many trips in and around the city each year, we don't have time to analyze each trip in detail. When we take a vacation, we investigate, we analyze, we compare, but when we're doing our daily commute we don't analyze – we just fall back into habit.

**Why we do what we do**

Often, traveler behavior is simply dictated by habit. The fact is that we often get into certain habits, and don't correct for them. Some people may be frustrated by driving, but they feel safe. And they see cars as more reliable than public transportation.

Traffic apps are useful tools that can help change these behaviors – and get drivers to consider other modes of transport, or choose to travel at different times.

They can do this by learning about people's priorities, calculating the actual cost of driving (including time spent, depreciation, fuel, and parking cost) for each individual journey, and proactively suggesting alternatives: another route, a different parking spot, or an alternative to driving altogether.
The need for speed

It’s become clear that urban planners need to look for the little levers that can drive change – and our data suggests that speed may be one of them.

70% of people in our survey say they’d be more likely to use public transport if they had a faster journey time.

Finding ways to increase speed and shorten commutes and journey times should be every city’s priority – travelers value it more than they do the frequency of service, or its cost.

Amongst all those surveyed, having a faster journey time (70%) is the aspect most likely to increase usage of public transport; this is closely followed by having more frequent services and reduced ticket prices/costs (both 64%). Access to payment facilities through mobile apps is the factor least likely to increase usage (35%).

Connecting citizens with services

Not all speed improvements need a major investment into new infrastructure. Insight from data analytics enables public transport services to map directly to people’s journeys.

Transit planners, for example, can rearrange routes so they’re more efficient and serve passengers better. An analysis of route performance is beneficial, but oftentimes we are too focused on system efficiency and lose sight of mobility as a whole. Our goal should be to connect riders with other transportation options such as ride-hailing, bikeshare, and car-share services.

Several of the U.S. Department of Transportation Smart City Challenge finalists have plans to set up these multimodal transportation hubs -- locations where people can choose to hop on the bus or request a ride, rent a bike, and more. It mixes public transit options with newer, private sector offerings to improve mobility citywide.
Where are people driving?

Of all those people that have regular access to a car, three quarters (72%) use it to go shopping, and almost two thirds (64%) go to leisure facilities. Half drive to get to work.

This suggests that as transportation professionals, we need to think about transport and urban centers more holistically and consider why people use them – e.g. driving into city centers to do shopping – and find alternatives for current habits.

Expert view
Scott Silence
Chief Innovation Officer, Public Sector, Conduent
Rochester, NY

The city center challenge

Most city planners are faced with a dilemma. On the one hand, they want cities to be buzzing, active and thriving. On the other, they don’t want them to full of cars. The secret: Momentarily escape from the transportation bubble and explore options to partner with merchants and other private sector organizations to solve consumer challenges.

For example, to discourage consumers from using their vehicles to go shopping, merchants can offer free shipping or delivery on items when a customer shows their transit ticket. Merchants have an opportunity to increase sales by targeting transit riders and transportation agencies can advertise these ‘specials’ via mobile ticketing apps. This kind of partnership could be the best way of keeping city centers open and vibrant while reducing the number of cars.
Case in point

One’s preferred choice vs the collective good

Jean-Charles Caulier
Sales Director,
Public Transport Management Systems
Lyon, France

Predictability drives choices. So if you’re in a busy city like London or Paris, you know that journey times are faster and more reliable on the Tube or the metro. You’re not as comfortable but at least you get there on time. In a cab or car, you’re comfortable but stressed if you’re stuck in a traffic jam. So you choose accordingly.

The ultimate nudge

Obviously, people’s preferred travel choices aren’t always best for their communities overall.

The city of Paris recently experienced such bad levels of air pollution that the French education minister even cancelled outdoor sports for schoolchildren. Paris mayor Anne Hidalgo took a radical step: only cars with even-numbered license plates were allowed to drive one day, alternating with odd-numbered ones the next day. But with this harsh policy came a friendly invite: on the days of the ban, all transport on Paris buses and the metro was free for travelers – which sent an important message to the community about the impact of each individual’s choices. And it demonstrated the city’s efforts to make transport – as well as city life – work for everyone.
Chapter 2

How do people feel about urban travel?
Our first chapter on choices has shown that people are influenced by personal preferences, comfort, convenience and habits just as much as they are by rational arguments such as price and speed. But there’s another important aspect that’s worth investigating: given that we move around our cities every day, we’re bound to have some strong emotions about the travel experience.

Understanding people’s emotional reaction to travel is crucial for city planners, helping them to identify priorities, plan for the future and even change behavior. And there are some major challenges:

Of those surveyed in North America, almost half chose the emotion ‘frustrated’ (27%) or ‘stressed’ (21%) to describe how travel in and around their city makes them feel, with 17% choosing ‘neutral’.

In the APAC region, there is a wider spread of emotions cited, with ‘neutral’ (19%), ‘stressed’ (16%), and ‘frustrated’ (15%) at similar levels.

Expert view
Wei-Ping Ong
Vice President and Managing Director, Public Sector Asia, Conduent Singapore

Driving in neutral
If you live in the Far East, you might be more inclined to feel ‘neutral’ about your travel experience because of cultural differences from the US and Europe. It doesn’t mean the experience is any better, it’s just that people react differently.

There is definitely a certain amount of frustration in Singapore, caused by two issues. The first is overcrowding on public transport, which is a growing concern and is being looked into and addressed. The second is traffic jams, which are still very bad at peak times, in spite of the official ‘car-light’ policy that discourages car ownership and usage.
Expectations and situational thinking

Frustration is usually caused by an outcome that’s different to what you expected – for example, when it takes 45 minutes to get to work instead of 30.

You can’t do anything about the external world, like eliminating traffic. If roads are clogged, you feel stressed and frustrated. The piece you can control is your stress levels, by having information upfront.

That’s why it’s crucial for cities to give their travelers real-time travel information, before they leave the house – so they can make better decisions. If your app or website tells you it’s a bad idea to leave now, via your usual route, you might decide to work from home for the first hour of the day, or take an alternative route.

The other big challenge is that expectations depend on the mode of transport you’re using – you’re not assuming a bus will give you the same experience as a cab. When it comes to selecting a mode of transport, people think situationally. So if they’re commuting to work and they’re five minutes late, it’s speed. If they’re out for a night on the town, it might be comfort.

If there’s one big challenge for city planners today, it’s removing that situational factor. It’s the key to changing behavior and make people think mode agnostically. That would mean they’d make better decisions for themselves and everybody else.

Are we there yet…?

Delays play a big part in rising levels of stress and frustration, and they’re most frequently associated with driving.

In fact 70% of those who drive monthly say they experience delays at least once a month, with 10% saying it’s the norm on 6-7 days a week – significantly higher than all other modes of transport.

Bus passengers aren’t far behind, with 61% of those who experience delays saying this causes them to spend less time with friends or family, and 51% saying it causes them to turn up late for work.
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The chase for a space

Delays aren’t limited to journeys – they’re also a big part of arriving at your destination by car, as you cruise around for that elusive parking space.

Motorists take on average 5.3 minutes to find a space where they live, despite 36% having a designated parking space. When they drive to work or to the shops, the average figure increases to 7.4 and 7.8 minutes respectively.

It’s worth pointing out that these averages across cities, countries and continents mask some of the worst cases of ‘parking hell’. In London, for example, 20% of motorists can spend up to 30 minutes looking for a space, according to other studies. Data from the traffic analytics company INRIX states that the average time stuck in traffic jams for drivers in the British capital is one of the highest in Europe, at 96 hours annually. Much of this congestion can be caused by ‘cruising for parking’.

Expert view

Matt Darst
Vice President of Parking & Mobility Solutions, Conduent
Chicago, IL

Small changes, big results

Heuristic techniques can help shape transportation behavior. Making incremental but calculated changes, evaluating, and creating a feedback loop can lead to improvements.

The City of Indianapolis, for instance, was able to change behavior by making slight changes to parking policies. Underutilized spaces in some areas had strict limits on the amount of time motorists could park. Increasing the parking duration drew motorists away from congested streets nearby and helped balance occupancy.

In downtown Los Angeles, demand-based pricing achieved similar results, shifting people to less used parking spaces to improve the use of limited resources.
Case in point

Understanding the aspiration to drive

**Jorge Tola**
Senior Vice President Sales and Marketing,
Public Sector Latin America,
Conduent
*Lima, Peru*

In developing economies, use of public transportation is massive, but car ownership is the ultimate aspiration of most – unlike other regions, such as Europe.

Cars are a status symbol, with the numbers entering the cities increasing hugely each year. But city authorities aren’t prepared for this influx, and schemes to limit cars – such as exclusion based on license plate numbers – are not as effective as they could be.

The result is often travel chaos, leading to the high levels of stress and frustration we see in the survey.
Chapter 3

How do people want to use transportation?
58% of our respondents agree that public transport provision will heavily affect the overall economic success of their city.

That means that every city planner needs to be aware that citizens take an active interest in transportation.

It can affect where some choose to work, live and raise their children. What's more, they're likely to apply the same expectations to the customer experience of urban travel as they would to other services they use daily. The online experiences that retailers, service providers, and in many cases, governments have created have raised the bar of customer experience to a high level. Our digital and physical lives are coming closer together: people want constant communication, real-time information and as much control as possible.

And although we're looking at the big picture, it's important not to lose sight of the basics. Our survey shows that even as people imagine the experience of traveling in the cities of the future, some priorities are as important as ever.

Reliability of service scores the highest, with 83% saying either fairly important or very important, closely followed by reliability of information (81%), frequency of services (80%) and price (80%).
Thinking of apps as facilitators

Throughout this survey, our experts have stressed the importance of apps – to understand patterns, educate people, and nudge them to new behaviors. Scott Silence has gone as far as to say that the future of transport will be less in new networks and technology – and determined predominantly by the way people can access information about transport – i.e. by the apps we give them (see sidebar).

Low-cost ways to data

Apps driven by real-time data are customer experience gold. But budget constraints and lack of in-house experts can make it hard for transport authorities to leverage their full potential. Here are some ideas:

- Look to existing sources of data (traveler surveys, databases, ticketing data, surveillance cameras, violation records) – you probably have more information than you know (see our eBook City Analytics [link] for more on this).
- Crowd-source talent by organizing a hackathon weekend – an amazing way to generate ideas and tap into the potential of dev talent – for a good cause.
- Improve as you go along: get an app out there, then test it, and modify how it works. Don’t aim for perfect the first time around – your users will guide you.

Expert view

Scott Silence
Chief Innovation Officer, Public Sector, Conduent
Rochester, NY

Transport in 2020 and beyond

In the next 5-10 years, transportation isn’t going to look very different from the outside: we’ll still have buses, trains and cars (which won’t yet be self-driving).

But people will stop looking at the physical transportation infrastructure. Instead, they’ll look to their smartphone, and make a choice based on what’s available. The app will become a key part of the infrastructure, putting people at the center of the transportation network.

Travelers want a seamless experience, whether it’s the train, bus or a ride-hailing service. For this to happen, attitudes will need to shift, with public transportation providers partnering with private providers rather than seeing them as competition.

The future of transportation is a combination of what’s possible and what’s needed. People often don’t know there’s a better way, so when they imagine the future, they’re limited by their current experiences and perceptions of travel.

Planners need to take the initiative and show the way forward.
Travel apps are now the norm, with over three-quarters (77%) of all survey respondents using a device (smartphone, desktop/laptop, tablet or wearable technology) to plan a journey in and around their city. These tools help people reliably predict when they arrive at their destination. Apps also give people confidence – to try routes and find parking in places they wouldn’t otherwise go. And they relieve a lot of the anxiety associated with travel and make you feel safe.

However, use of apps is a lot higher among public transport users* than non-users. It may be that those not using public transport are unaware of apps that could make their lives easier, like the ones that help them find a parking space – which are only used by only 4% of those who use a smartphone to plan their journeys or receive travel information. Cities still need to create awareness of the tools that are at people’s disposal.

*those who use public transport at least one day a month

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**Expert View**

Joe Averkamp  
Senior Director, Technology, Policy and Strategy  
Conduent  
Washington, DC

**Policy drivers**

Our global survey clearly shows how important transport is in everyone’s daily life. The question is, what are our goals as a society? We want to provide a good quality of life for citizens but that can mean various things: improving safety, decreasing journey time, or even preserving the environment. And it all comes down to how we use pricing. When we price transportation options, we do so to ensure there is funding, but also transportation pricing is a tool to nudge behavior.

For instance, we might choose to subsidize transit options to make them more affordable and appealing. Toll roads are priced to raise money but also to manage demand. As new transportation modes emerge, pricing can be used to create incentives or disincentives, depending upon the policy goals we are working to achieve.
One of the key findings is that modern citizens don’t think in terms of “us vs them”.

When asked about their ideas on transportation in 2020, almost half of respondents (49%) agreed that they will have one app for all their transport needs.

Across demographics, agreement is the highest amongst the youngest age group (62% for 18-24s), falling to 39% for 55-65s.

Just over half (52%) of those surveyed found the proposition of an “end-to-end multi-modal transport” experience appealing – a clear signal to transport authorities and cities to think beyond the silo of public vs. private and integrate their offering with other services. Denver, Colorado, USA is already working with ride-hailing services to provide a first-and-last-mile service to passengers in areas that are underserved by buses – a win/win situation for all parties.

Just over half (52%) of those surveyed found the proposition of an “end-to-end multi-modal transport” experience appealing; this is more likely to be the case amongst 18-34 year-olds (58%) compared with 35+ (50%). As you would expect, appeal is also higher amongst those who already use a device to plan journeys (59% vs. 29%) or to find and receive travel information (58% vs. 24%). Users of public transport at least once a month are also more likely to find it appealing compared with those who don’t (61% vs. 37%).

Expert view

Jorge Tola
Senior Vice President Sales and Marketing, Public Sector Latin America, Conduent
Lima, Peru

Taking a community approach

Transportation is affected by everything happening in a city and it affects the city in turn. That’s why we need to take a community approach, involving all interested parties – passengers, city authorities at every level, and tech companies. It’s important to integrate ‘city sense’ into your approach, so it serves everybody.

Planners need to look at city-wide challenges, and see what technology can be used today. A big part of that is using social media to gather data.

The most important thing to remember is that you’ll never fix all the problems at once. You need to decide which is the top problem and fix that.
Access to education and jobs is critical to residents of underserved areas. As such, the reach of public transportation is really tantamount to a human right. Consequently, solving the “first and last mile” problem is something all urban planners should address.

How can we get people from their home to public transportation, and from that to their destination? It’s a challenge that’s exacerbated by greater distances, and many people default to use of a personal vehicle to get to school or work.

Increasingly, however, transportation authorities are working with private companies to address this gap, extend their reach, and change behavior. Centennial, Colorado, for instance, is subsidizing ride-hailing services to get people to rail stations. And in Boston, the Massachusetts Bay Transportation Authority is offering paratransit customers on-demand services in partnership with ride-hailing companies.
Conclusion

Getting ready for the future of urban travel

Travel policies that work against people’s wishes rather than with them have limited success.

Singapore is a rare example of tough love done well – it combines a car-light policy with innovative thinking and experimentation (self-driving cars, rain-protected access to public transport, etc.). It’s also experimenting with “incentives to shift ridership demand.”

The Netherlands has taken a different approach. It’s invested heavily in cycle lanes (it has 35,000 km/20,000 miles of them – one of the densest networks in the world) and succeeded in creating a firmly embedded bicycle culture. 29% of those surveyed use this mode of transport 6-7 days a week – significantly higher than any other country in our survey.

Copenhagen has done the same, and now has more bicycles entering the city every day than cars, which is a first in Europe.

Paris takes a carrot-and-stick approach to combating pollution when levels are high, banning odd or even number plates on specified days, but also – crucially – making public transport free on those days, so it’s easy for people to do the right thing.
It goes to show: if you want to reduce driving, you need to understand the wishes of drivers – and offer something a lot better in return.

But what is that magical offer in return? If we’ve learnt one thing from our survey, it’s that there are no hard and fast rules to the customer experience of urban travel. The policies, cultures, and infrastructures around the world are far too different for sweeping statements.

Still, a few voices have piped up loud and clear. We now know that to keep their cities moving and make them more successful, vibrant and livable, planners need to do three key things:

- Find ways to change people’s travel behavior, by understanding their habits, experience and expectations. Customer-centric innovation – through increased usage of apps or targeted campaigns, for example – is key to encouraging behavioral changes. We’ve learned that comfort and speed are the most important aspects of urban travel for citizens. This is where we need to shift our priorities.

- Increase the capacity of existing infrastructure – for public transport, by encouraging competition and incentivizing operators to do better. And for private transport, by using passenger detection to increase occupancy. We’ve learned that people value predictability and reliability – so even if we can’t completely avoid delays, we need to provide the information that lets them re-plan their journeys or at least estimate their new arrival time.

- Improve the efficiency of services by harnessing the power of analytics (data, text and video), encouraging end-to-end multi-modal travel and thinking beyond silos – in transportation and elsewhere (such as retail). It has become clear that the smart use of data and infrastructure – public or private – is the way forward. Black and white thinking such as “cars vs public transport”, or “public vs private” will not lead to innovative solutions in a rapidly changing world.
There couldn’t be a more exciting time to be in transportation than right now.

Our global survey gives a fascinating glimpse of how transportation will look in the decades to come, as we push back the boundaries and find innovative new ways of meeting the challenges of today and harnessing the opportunities of tomorrow.

Never before have planners had such a powerful combination of technology, insight and global best practices to help them transform the urban travel experience.

The future of transport starts right here. Why not join us on the journey?

Contact us today at transportation@conduent.com.
The customer experience of urban travel

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Methodology

An online survey was conducted by Ipsos MORI on behalf of Conduent among 18-65 year-olds who hold a driver’s license. A final sample size of n=2320 was achieved across 23 cities between the 6th-22nd September ’16 [London (109), Melbourne (100), Sydney (100), Singapore City (101), Austin (100), Los Angeles (100), New York (100), Philadelphia (100), Portland (100), San Francisco (100), Washington DC (100), Kuala Lumpur (100), Amsterdam (100), Milan (100), Paris (104), Madrid (100), Brussels (101), Montréal (100), Toronto (104), México City (100), Santiago (101), Lima (100) and Frankfurt (100)]. Controls were placed on age and gender to ensure broad demographic coverage within each city. Ipsos MORI was responsible for the fieldwork and data collection only. Conduent was responsible for the analysis, reporting and interpretation of the results.
About Conduent

Conduent is the world’s largest provider of diversified business process services with leading capabilities in transaction processing, automation and analytics. The company’s global workforce is dedicated to helping its large and diverse client base deliver quality services to the people they serve. These clients include 76 of the Fortune 100 companies and over 500 government entities.

Conduent’s differentiated offerings touch millions of lives every day, including two-thirds of all insured patients in the U.S. and nearly nine million people who travel through toll systems daily. Whether it’s digital payments, claims processing, benefit administration, automated tolling, customer care or distributed learning – Conduent manages and modernizes these interactions to create value for both its clients and their constituents. Learn more at www.conduent.com.