

# Your customer's attitudes towards UK transport security

The currency of cyber trust

Effective cyber security is essential to underpin today's evolving transport industry and deliver on the promise of truly open data.

## Cyber security in the UK today

As cyber crime rises and everyday services are increasingly digitalised, public opinions on cyber security are changing. Citizens are more careful about how they share their information and more aware of organisations who might fail to protect it. To find out more, we surveyed over 3,000 UK citizens to explore how and why attitudes and behaviours around cyber security are evolving and what this might mean for the transport industry.

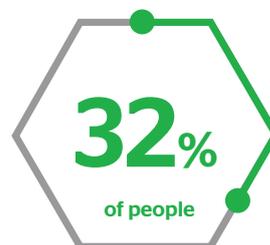
## Power of data

The availability of open data is revolutionising the transport industry. High volumes of real-time information are exchanged between operators, third parties and travellers who now rely on mobile apps to keep abreast of travel choices from the moment they first plan a journey until they reach their destination, and then what they'd like to do when they get there.

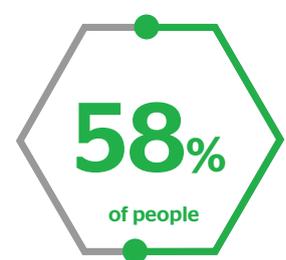
Real-time data sharing and integration - together with secure e-payments and ticketing - are all about delivering better customer experiences. It's a virtuous circle: the better the experience, the more ready customers are to give their information, which operators can then use to improve and up-sell their services. In turn, the better the experience, the more customers trust the organisation and continue to share their data.

## Changing awareness

In this ever-more connected world, it's perhaps not surprising that 63% of our survey respondents say that recent high-profile cyber attacks have made them more aware of cyber security as an issue that may impact their life. Given that transport is a national critical infrastructure, any loss of service has serious implications for travellers, transportation organisations and the nation's productivity.



consider transport services to be at high risk of attack



say cyber security is a deciding factor when choosing organisations to interact with



Your report into cyber security in the UK today and the data behind our Digital Vision for Cyber Security

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There are also reputational risks for transport operators. Our survey found that only 13% of respondents say their trust in organisations has increased over the last two years and 38% say they do not trust organisations to store their data. This erosion of trust can find its way to the bottom line for businesses such as airlines, for whom customer loyalty is so valuable. We found that only one in four customers say they would trust an organisation enough to deal with them again if they fell victim to a cyber attack. And this could apply across the industry; for example, while choice of rail services may sometimes be limited for customers, they could still choose to change mode and travel by car if they felt their data was vulnerable.

### How to win and retain cyber trust

So, what do UK citizens expect from transport operators? 53% say they feel reassured by being required to go through a rigorous security process when logging into transport apps, for example to purchase tickets or check air miles. 58% also want cyber security defences to be managed by a combination of human insight and automated technology. Threat monitoring is critical and as cyber threats evolve, so must transport operators' capabilities.

Communication about cyber security is just as important as technology when it comes to building trust, with 82% saying they expect an organisation to inform customers in the wake of an attack. We also found a willingness, when it comes to financial or personal information, to go through more cyber security steps in exchange for better security, with 56% willing to compromise their experience for increased protection, 66% happy to compromise on the speed of a service and 59% happy to compromise on the complexity of logging in. However, this may not necessarily be the case for specific transport apps or location data, for instance, to view transport timetables or navigate through a city.

### Driving more innovation

Security of customer data will be critical as paper tickets are eliminated across the industry for the adoption of open fare payments. And as autonomous cars, trains and delivery vehicles enter the mainstream, and innovations such as

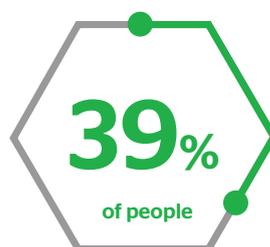
subscription-based 'mobility as a service' become established, a secure and open digital environment will be essential. Linking online and offline customer experiences will also be increasingly important, such as using data to personalise and improve journeys for customers and increase revenue opportunities for transport operators and partners.

What's clear, both for new transport industry players and incumbents, is that cyber trust is increasingly integral to customer experience. Customers want more innovation, with 67% saying they would trust an organisation more to know it was investing in advanced tech and 69% saying more innovative technology is needed to maintain cyber security.

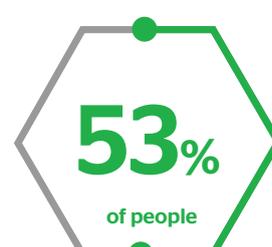
### Conclusion

The digital transformation of the transport industry will be inhibited if customers aren't comfortable sharing their information. The drive for more integrated transport policies and the demands of customers place cyber security firmly on transport operators' agenda.

Open data that is securely shared and stored will enable companies along the supply chain to innovate and improve to deliver more personalised and frictionless journeys for customers. Effective cyber security - together with customer communication and transparency - will help to strengthen wider trust in transport brands and help forward-thinking companies to realise their digital ambitions.



expect to see transport companies using data encryption



feel reassured by being required to go through a rigorous security process



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