Fall 2023

**Customers Count Survey**

NYCT Committee Meeting
January 29, 2024

Subway   Bus   Access-A-Ride

Executive Summary - NYCT

- The Fall 2023 bi-annual Customer Satisfaction survey was conducted November 6-20, 2023, with English and Spanish offered online and on the phone. We received more than 115,000 subway line, 25,000 bus route and 3,000 AAR evaluations from over 80,000 NYCT customers.

- **Subway customer satisfaction is 52%,** a four-percentage point decrease from the Spring. **However, most key performance metrics are improved, as customer satisfaction with their line is up four percentage points to 58%, and satisfaction with their station is up six percentage points to 67%.**
  - Customers who ride most frequently (5 or more days a week) are the most dissatisfied group, as only 46% of customers who ride the subway five or more days a week are satisfied, down percentage points from the Spring. Furthermore, as our ridership has increased, the survey sample, especially among frequent riders, has also increased and now accounts for 47% of the study sample (up from 45% in the Spring).

- Customers continue to feel safer on trains and in stations, with safety on trains up four percentage points to 54% and in stations up three percentage points to 51%.
  - However, safety remains an important issue for customers. Quality-of-life concerns (43%) and People behaving erratically (41%) are the most mentioned areas that, if addressed, would increase customer satisfaction. Furthermore, Safety from Crime and Harassment on trains is the second most important attribute driving satisfaction.

- Service Reliability and Waiting times, two important drivers of customer satisfaction, improved by two percentage points to 58% and 55%, respectively.
  - Frequent travelers (5 or more days a week) are more likely to mention reliable service and frequent service on weekdays as areas that need improvement to increase their satisfaction.

- **Overall Local, Limited and Select Bus customer satisfaction is 57%,** an eight-point decrease from the Spring. Overall Express bus customer satisfaction is 72%, a seven-percentage point decrease.
  - Local bus customers who ride most frequently (5 or more days per week) make up nearly half (46%) of the survey sample and are the least satisfied group at 50% (down 11 percentage points from Spring).

- Local bus route satisfaction is 65%, down from 69% in the Spring. At the borough level, declines are concentrated in Brooklyn (down six), Queens (down five), and Staten Island (down 10). Satisfaction with Bronx and Manhattan routes remained consistent with the Spring.
  - Customers in Queens and Brooklyn are more likely to mention wait times and more reliable service as what needs to improve to increase their satisfaction.

- **Access-A-Ride continues to improve its service, which is reflected in customer satisfaction score increase to 68%, up from 64% in the Spring**
  - The increased overall score can be explained by gains in attributes with largest influence on overall satisfaction. Satisfaction with On Time Pick Up increased eight points from the Spring to 59%. Travel times and Getting a ride for the day/time of your request increased four and six points respectively.

**Fall 2023
Customers Count Survey**

NYCT: Overall Satisfaction Trends

Express Bus: 76% (Spring 2022), 79% (Fall 2022), 79% (Spring 2023), 72% (Fall 2023)

Local, Limited and Select Bus: 63% (Spring 2022), 64% (Fall 2022), 65% (Spring 2023), 57% (Fall 2023)

Access-A-Ride: 61% (Spring 2022), 65% (Fall 2022), 64% (Spring 2023), 68% (Fall 2023)

Subway: 48% (Spring 2022), 54% (Fall 2022), 56% (Spring 2023), 52% (Fall 2023)

Spring 2022 | Fall 2022 | Spring 2023 | Fall 2023
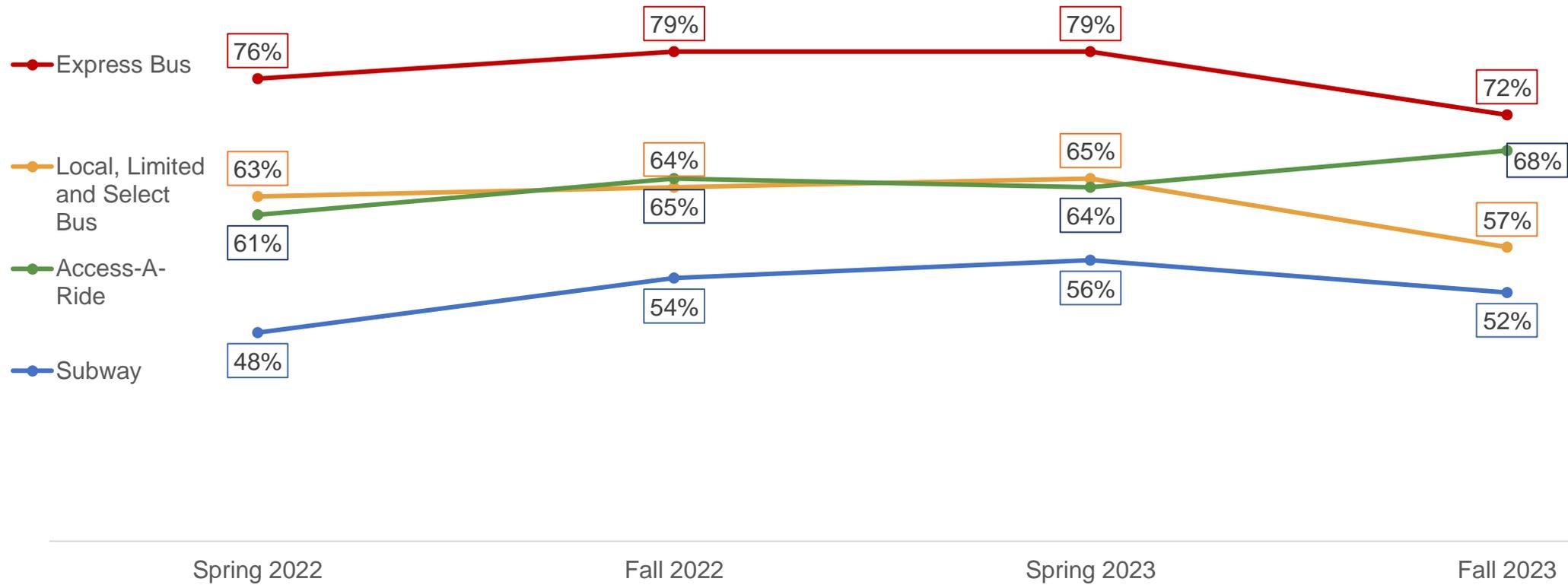
Fall 2023 Customers Count Survey

Question: In general, how satisfied are you with the [mode]?
Base: Customers who use an MTA mode at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10)

The four major Subway KPIs are steadily increasing

Subway: Overall KPI Satisfaction Rates
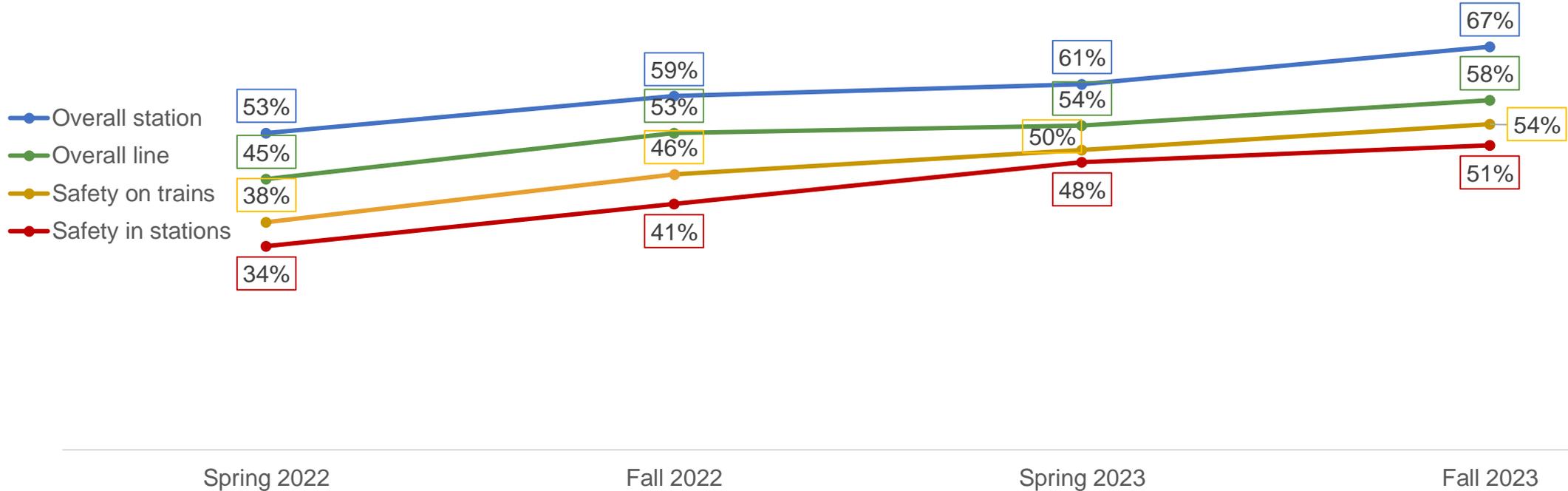
Legend:
- Overall station
- Overall line
- Safety on trains
- Safety in stations

	Spring 2022	Fall 2022	Spring 2023	Fall 2023
Overall station	53%	59%	61%	67%
Overall line	45%	53%	54%	58%
Safety on trains	38%	46%	50%	54%
Safety in stations	34%	41%	48%	51%

Overall satisfaction with the subway

	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied
Spring 2022		48%		
Fall 2022		54%		
Spring 2023		56%		
Fall 2023		52%		

■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

**Fall 2023
Customers Count Survey**

Question: In general, how satisfied are you with the Subway (including the Staten Island Railway)?
Base: Customers who use the Subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10)
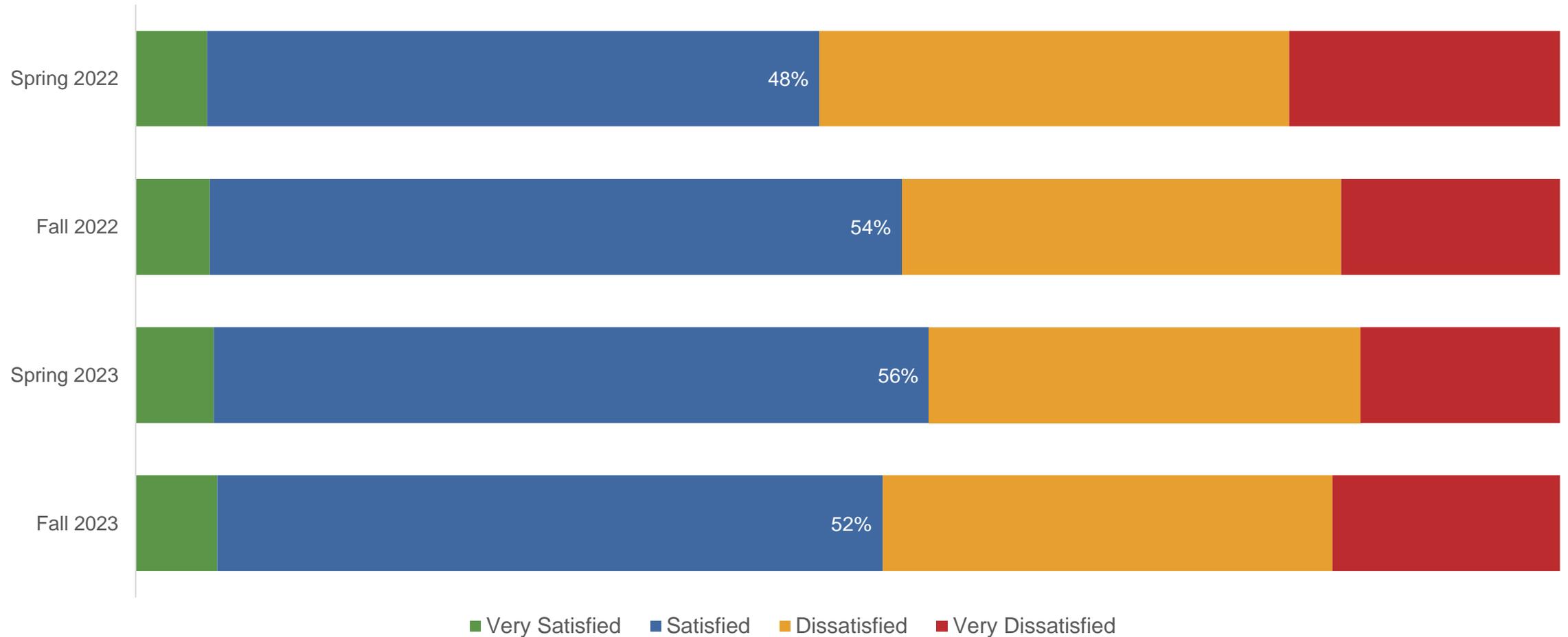
Customers who ride more frequently are less likely to be satisfied with the subway overall

Overall Subway Satisfaction, by Frequency of Ridership
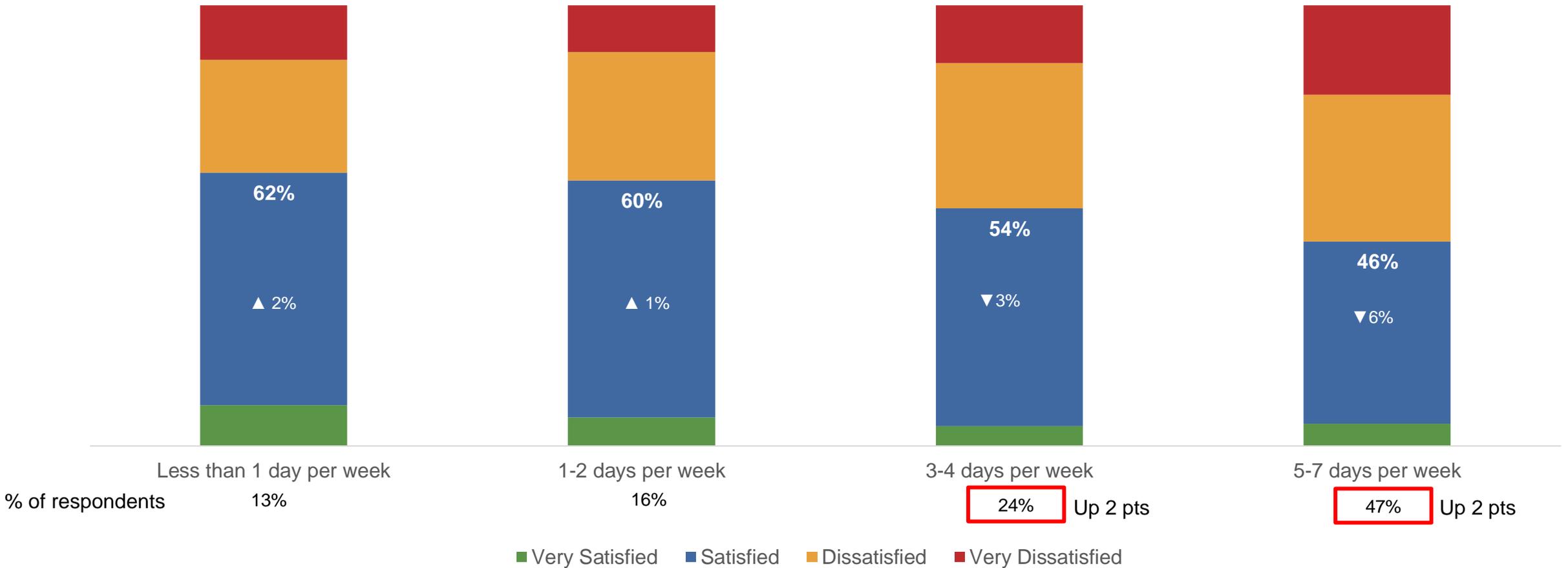
	Less than 1 day per week	1-2 days per week	3-4 days per week	5-7 days per week
% of respondents	13%	16%	24% Up 2 pts	47% Up 2 pts

■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

Fall 2023 Customers Count Survey

Question(s): In the last 6 months, how many days in a typical week did you use the following MTA services?
Note: Ridership Frequency response options were reduced from Spring 2023 to Fall 2023
Base: Customers who use the Subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023

6

Reducing Quality-of-Life concerns and erratic behavior are the most commonly-mentioned ways to improve overall subway satisfaction

What needs to improve to increase customer satisfaction by Frequency of Ridership (in order of overall percentage)

Legend: ■ Less than 1 day per week ■ 1-2 days per week ■ 3-4 days per week ■ 5-7 days per week

Question(s): Which of the following needs to improve to increase your subway satisfaction? Select up to three.
Base: Customers who use the Subway at least once in the last 6 months
—— Indicates % chose answer among Total
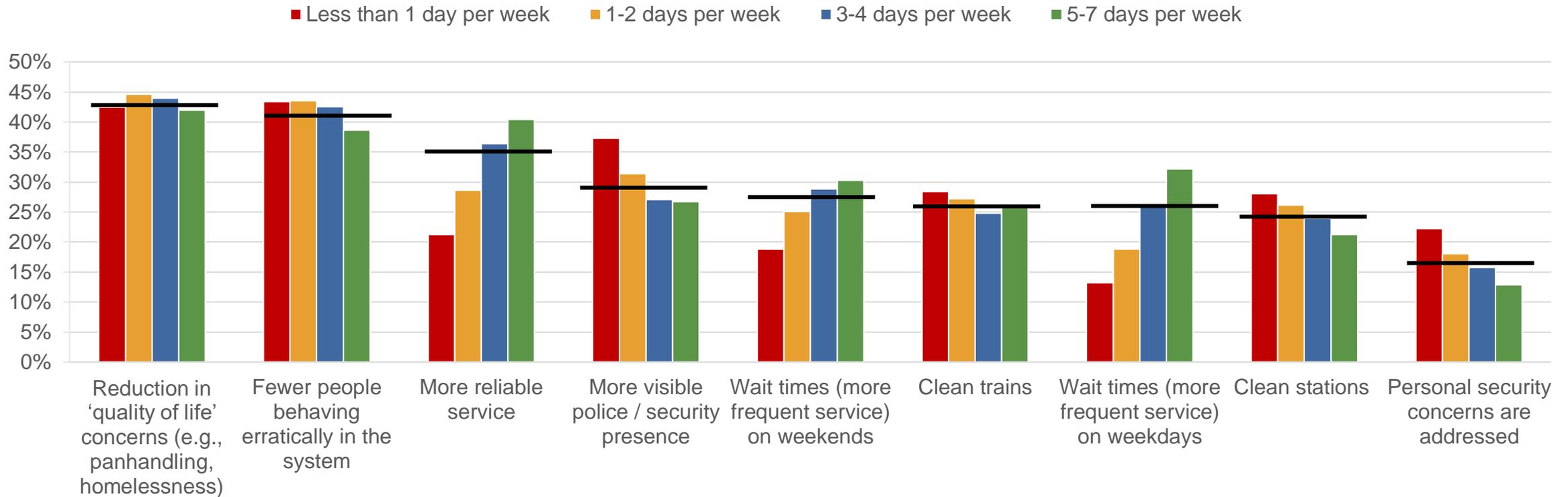
Subway attribute satisfaction levels (in order of importance)

Very Important Key Drivers

Attribute	Satisfaction
Value for money	55%
🔴 Safety from crime or harassment on board trains	52%

Important Key Drivers

Attribute	Change	Satisfaction
🟣 Service reliability	▲ 2%	58%
🟣 Frequency of delays		49%
🟠 Cleanliness on board trains	▲ 9%	57%
🟣 Waiting times	▲ 2%	55%
Safety from accidents on board trains	▲ 5%	67%
🟣 Crowding on board trains	▲ 4%	51%
🔴 Safety from crime or harassment in stations		59%

Attribute Concepts
- 🟣 Service
- 🔴 Safety and Security
- 🟠 Cleanliness

Question(s): How satisfied are you with your subway train? How satisfied are you with your station?
Base: Customers who use the Subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023 of attributes whose wording did not change

What drives customers' sense of safety?
# (only asked of customers dissatisfied with safety)

Relative impact on sense of safety (onboard trains) (48% of sample)

Category	No Impact	Minor Impact	Major Impact
Erratic behavior by other customer(s)	%	23%	74%
Threatening/menacing customer(s)	5%	27%	67%
Presence of a homeless individual(s)	6%	27%	67%
Disorderly/loud customer(s)	5%	32%	63%
Panhandling on the train	10%	39%	50%
Too many people	16%	41%	44%
Feeling trapped	21%	37%	42%
Customers smoking/vaping	25%	33%	42%

Legend:
- No Impact (grey)
- Minor Impact (orange)
- Major Impact (red)
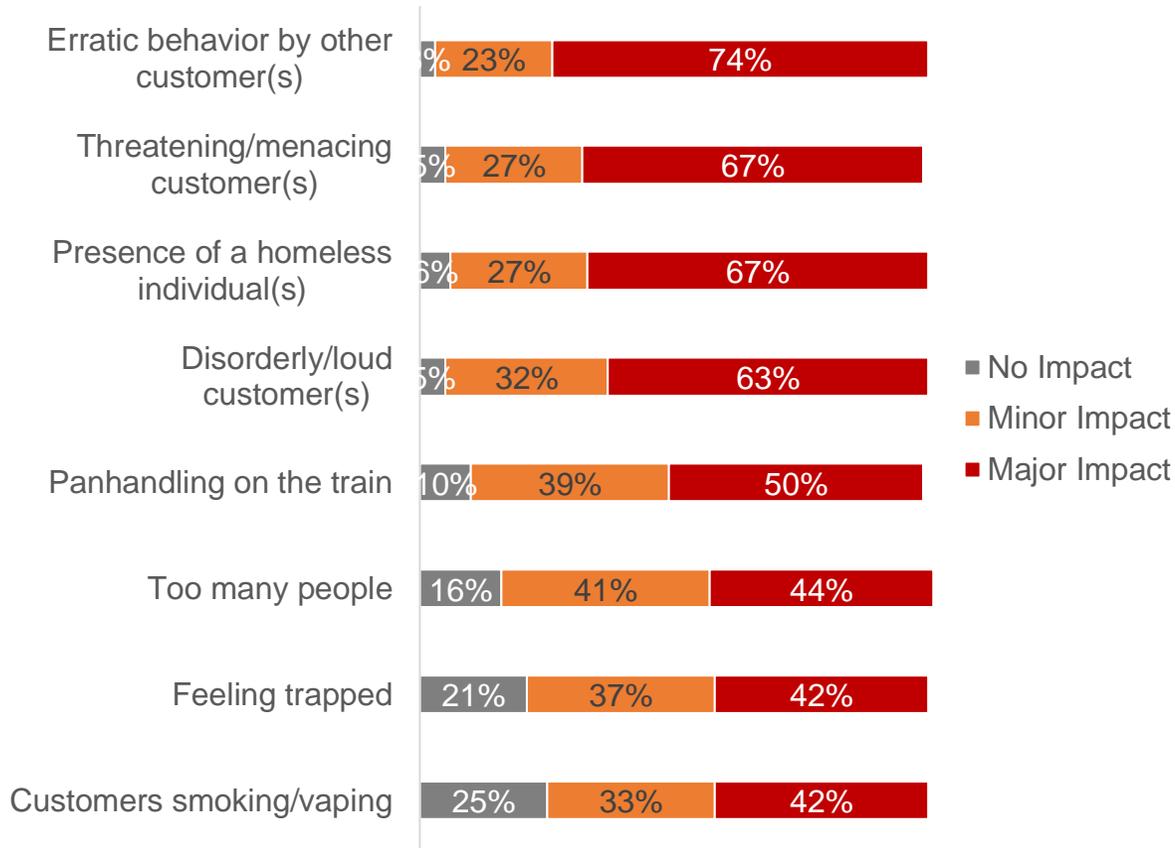
Relative impact on sense of safety (at stations) (41% of sample)

Category	No Impact	Minor Impact	Major Impact
Erratic behavior by other customer(s)	%	25%	71%
Presence of a homeless individual(s)	7%	26%	67%
Threatening/menacing customer(s)	7%	27%	66%
Disorderly/loud customer(s)	8%	32%	61%
Panhandling on the platform	16%	36%	47%
Customers not paying	33%	27%	40%
Platforms feel narrow	25%	37%	38%
Customers smoking/vaping	28%	33%	38%
Dark/poorly lit	30%	40%	29%
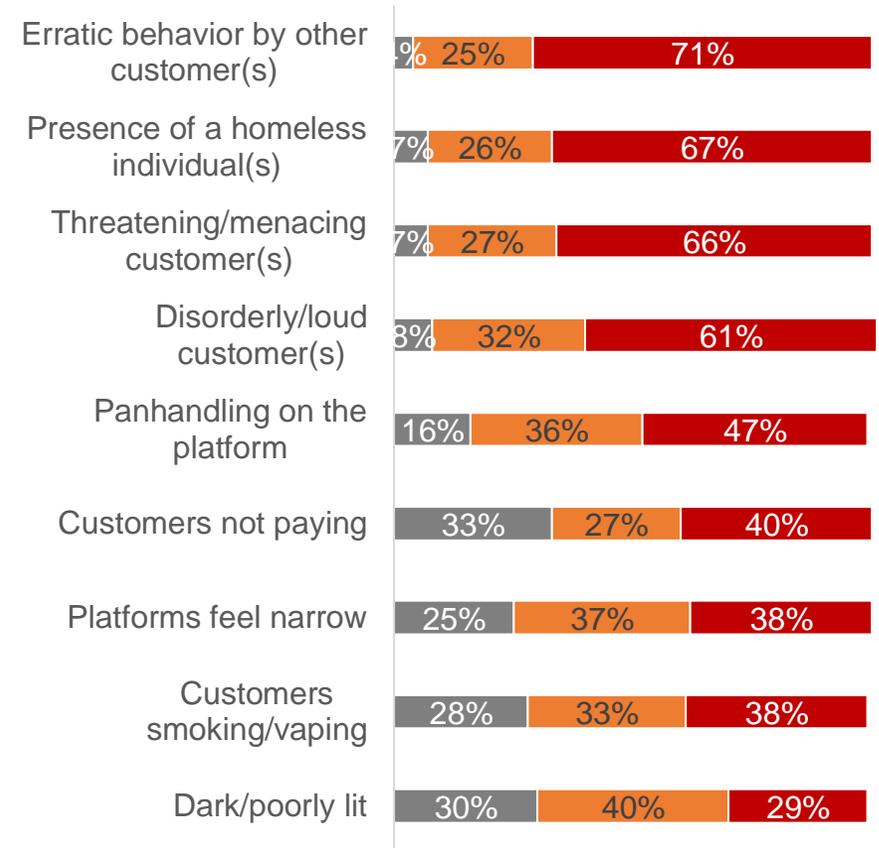
Question(s):You indicated your dissatisfaction with the safety from crime or harassment on board the train; what level of impact did each of the following have on your sense of safety?
You indicated your dissatisfaction with the safety from crime or harassment at your station; what level of impact did each of the following have on your sense of safety?
Base: Subway customers who are dissatisfied with the safety from crime or harassment of their line (48% of sample) or station (41%)

Satisfaction with Safety from Crime or Harassment

Satisfaction with Safety on Trains (lowest scoring lines)

Overall line average = 52%

| Line	%
J/Z	45%
2	46%
A	47%
4	48%
5	48%
D	48%
E	48%
6	49%
3	49%
F	49%
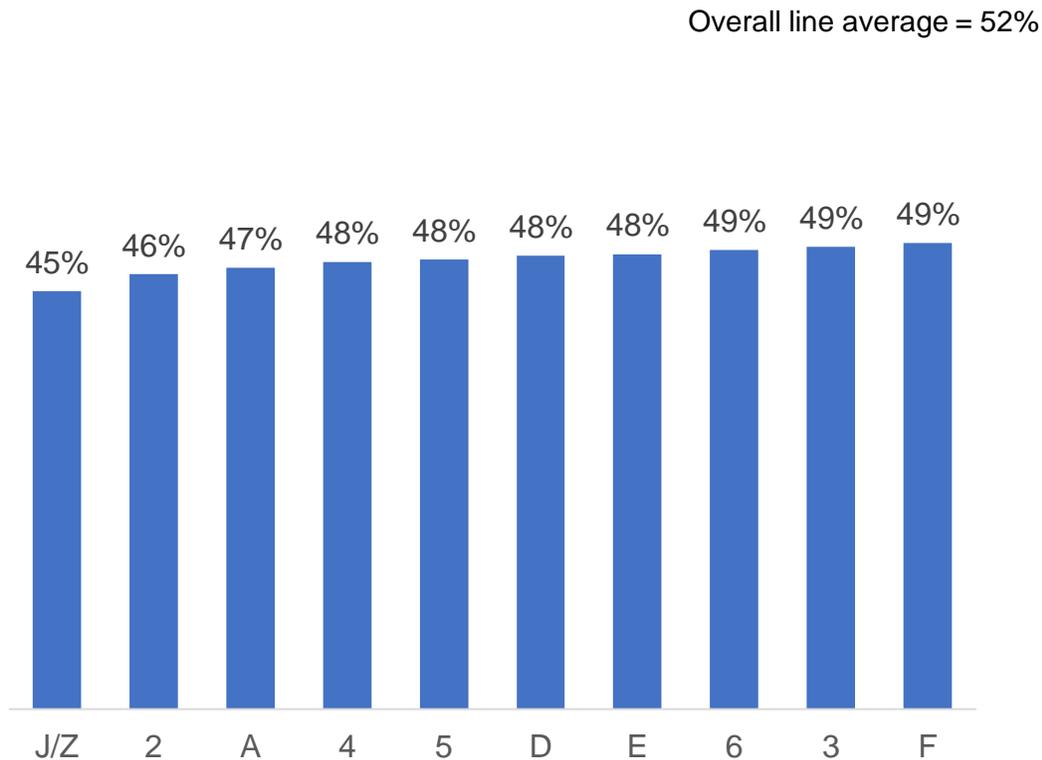
Satisfaction with Safety in Stations (lowest scoring stations)

Station	NYPD District	GSM	Safety from Crime or Harassment in Station	Overall Station Rating
116 St (6)	4	4	28%	33%
125 St (456)	4	4	30%	38%
Kingsbridge Rd (BD)	11	2	31%	46%
191 St (1)	3	1	33%	45%
3 Av-149 St (25)	12	3	34%	43%
Delancey St-Essex St (FJZM)	4	9	36%	45%
Simpson St (25)	12	3	37%	53%
135 St (23)	3	3	38%	49%
East Broadway (F)	4	9	40%	40%
Prospect Av (25)	12	3	40%	52%

Overall safety in station average = 59%

Question (s):How satisfied are you with the train line? Safety from Crime or Harassment On Board Trains.
How satisfied are you with the station? Safety from Crime or Harassment
Note: Attribute text change from Personal Security in Stations to Safety from Crime or Harassment no trending available
Base: Customers who use the subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10)

Overall line satisfaction is up 4 points

Overall Satisfaction On Board Rates by Line

Fall 2023 Overall Subway Line Satisfaction Rate (58%, 54% in Spring)

Line	Rate	Change
1	64%	▲8%
2	57%	▲5%
3	61%	▲6%
4	58%	▲4%
5	56%	▲3%
6	58%	▲4%
7	63%	
A	55%	▲6%
B	61%	▲6%
C	58%	▲7%
D	52%	▲5%
E	56%	▲9%
F	55%	▲5%
G	66%	▲5%
J/Z	52%	▲6%
L	67%	▲4%
M	56%	▲4%
N	55%	▲4%
Q	63%	
R	55%	▲4%
W	54%	
S 42	87%	▲9%
SIR	75%	

■ Very Satisfied ■ Satisfied

Fall 2023 Customers Count Survey

Question: How satisfied are you with the train line? Overall.
Base: Customers who use the Subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023

All GSM zones showed increased overall station satisfaction, which correlates with the 8-point improvement for station cleanliness.

Overall Station Satisfaction by GSM Zone

125 St (A/B/C/D) – up 13 pts to 58%

34 St-Penn Station (A/C/E)– up 16 pts to 65%

Wall St (4/5) - up 13 pts to 77%

Fall 2023 Overall Subway Station Satisfaction Rate (67%, 61% Spring) ▼

Zone	Value	Change
1	73%	▲7%
2	65%	▲9%
3	59%	▲4%
4	61%	▲5%
5	65%	▲8%
6	67%	▲12%
7	69%	▲6%
8	69%	▲5%
9	56%	▲7%
10	72%	▲9%
11	70%	▲5%
12	73%	▲8%
13	65%	▲4%
14	69%	▲4%
15	72%	▲4%
16	70%	▲4%
17	61%	▲6%
18	70%	▲3%
19	68%	▲8%

Zones 1–4: **Bronx and Upper Manhattan**
Zones 5–10: **Midtown and Lower Manhattan**
Zones 11–15: **Brooklyn**
Zones 16–19: **Queens**
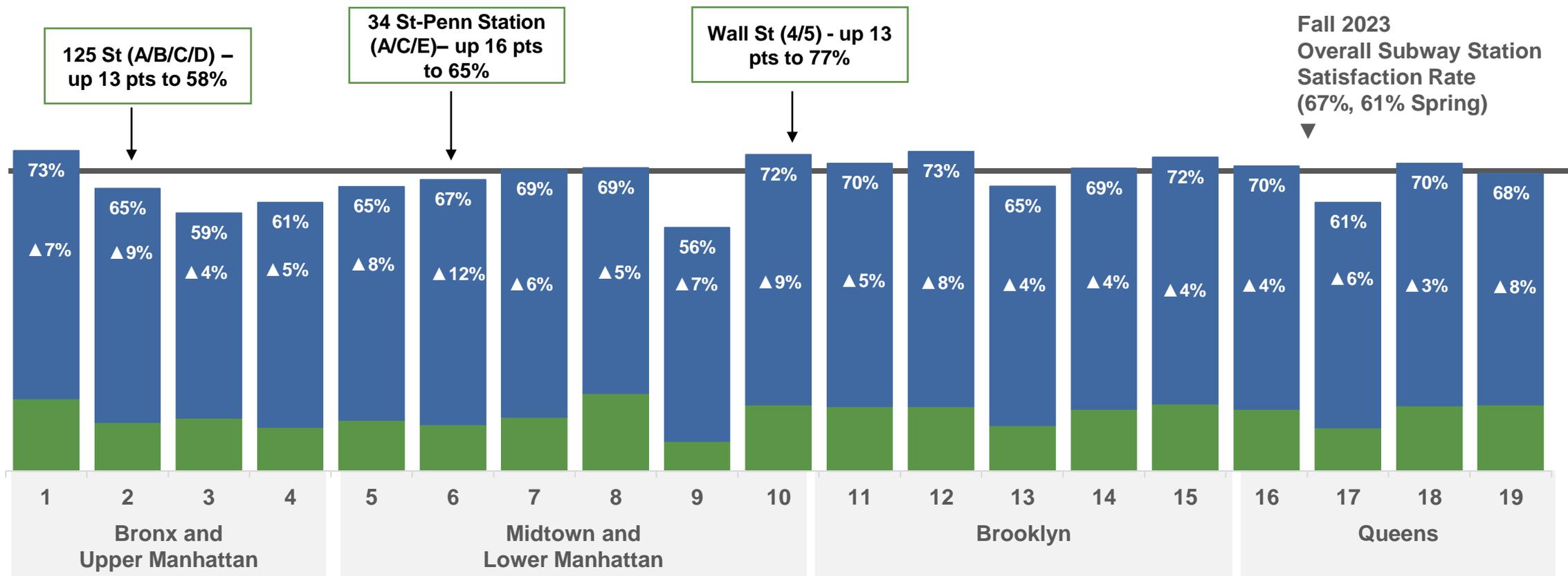
Fall 2023 Customers Count Survey

Question: How satisfied are you with the station? Overall
Base: Customers who use the subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023

12
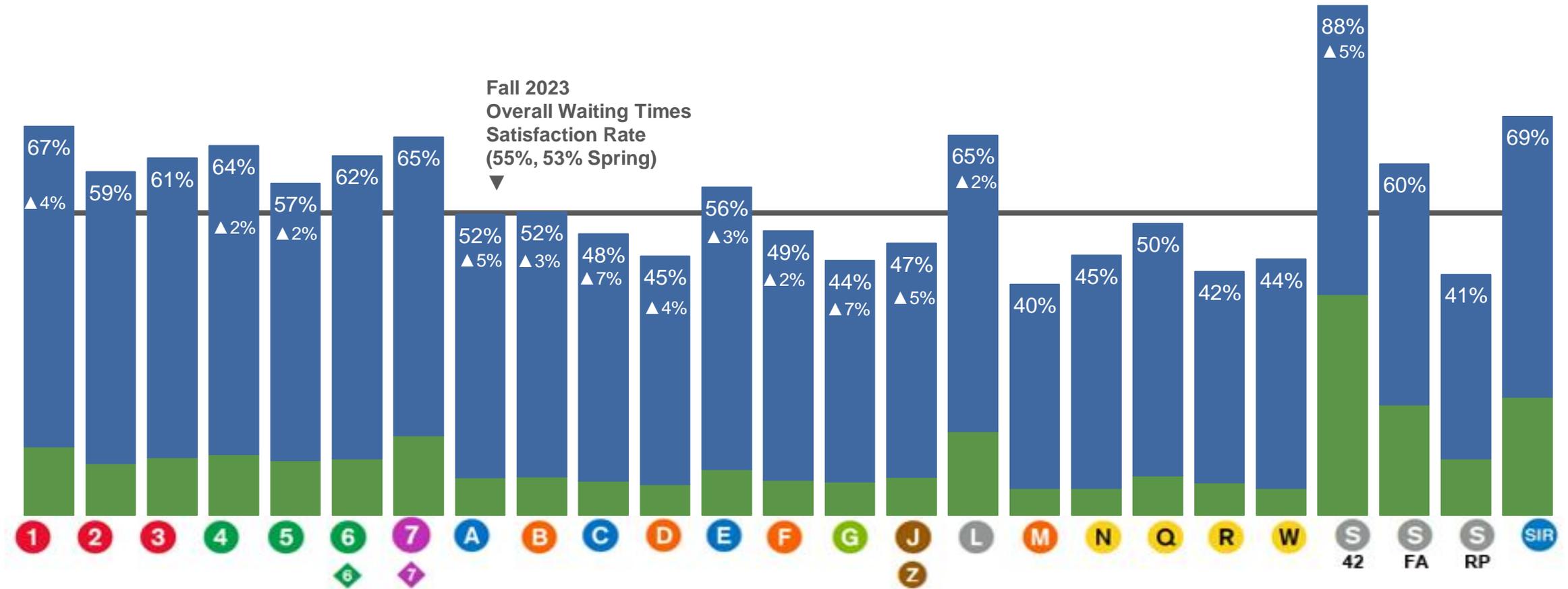
Satisfaction with Service Reliability by Line

Customers who interact with an agent outside of the booth are more likely to be satisfied with the interaction.

Satisfaction With Station Agent Interaction

Overall
26% of sample
70%

In the booth
66% among those who interacted
66%

Near MetroCard machine/turnstile
22% among those who interacted
79%

On the platform
12% among those who interacted
75%

Legend: ■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

Fall 2023 Customers Count Survey

Question: How satisfied were you with your most recent interaction with an MTA station agent?
Base: Customers who interacted with a Subway Station Agent in the last 6 months
Percentage shown is total satisfied (rated 6-10);

15

Typical Subway Payment Method & Satisfaction with Fare Payment Options

	Satisfied with Fare Payment Options (Fall 2023)
OMNY	85%
Pay-Per-Ride MetroCard	76%
30-Day Unlimited MetroCard	73%
7-Day Unlimited MetroCard	68%
Single Ride ticket	76%

OMNY
- Fall 2022: 33%
- Spring 2023: 39%
- Fall 2023: 44%

Pay-Per-Ride MetroCard
- Fall 2022: 35%
- Spring 2023: 30%
- Fall 2023: 27%

30-Day Unlimited MetroCard
- Fall 2022: 13%
- Spring 2023: 12%
- Fall 2023: 12%

7-Day Unlimited MetroCard
- Fall 2022: 4%
- Spring 2023: 4%
- Fall 2023: 4%

Single Ride ticket
- Fall 2022: 3%
- Spring 2023: 3%
- Fall 2023: 3%

Legend: ■ Fall 2022 ■ Spring 2023 ■ Fall 2023

Question (s): How do you usually pay for the Subway?
How satisfied are you with the starting station? Fare payment options (i.e., How you can pay)
Base: Customers who use the subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10)

Spring 2023

Customers Count Survey

NYCT Committee Meeting June 2023

Bus

Overall satisfaction with the bus

Overall Local Bus Satisfaction

Spring 2022	63%
Fall 2022	64%
Spring 2023	65%
Fall 2023	57%

Overall Express Bus Satisfaction

Spring 2022	76%
Fall 2022	79%
Spring 2023	79%
Fall 2023	72%

Question(s): In general, how satisfied are you with buses?
Base: Customers who use the bus at least once in the last 6 months

Customers who ride more frequently are less satisfied with the bus overall, down significantly from Spring

Overall Local Bus Satisfaction, by Frequency of Ridership
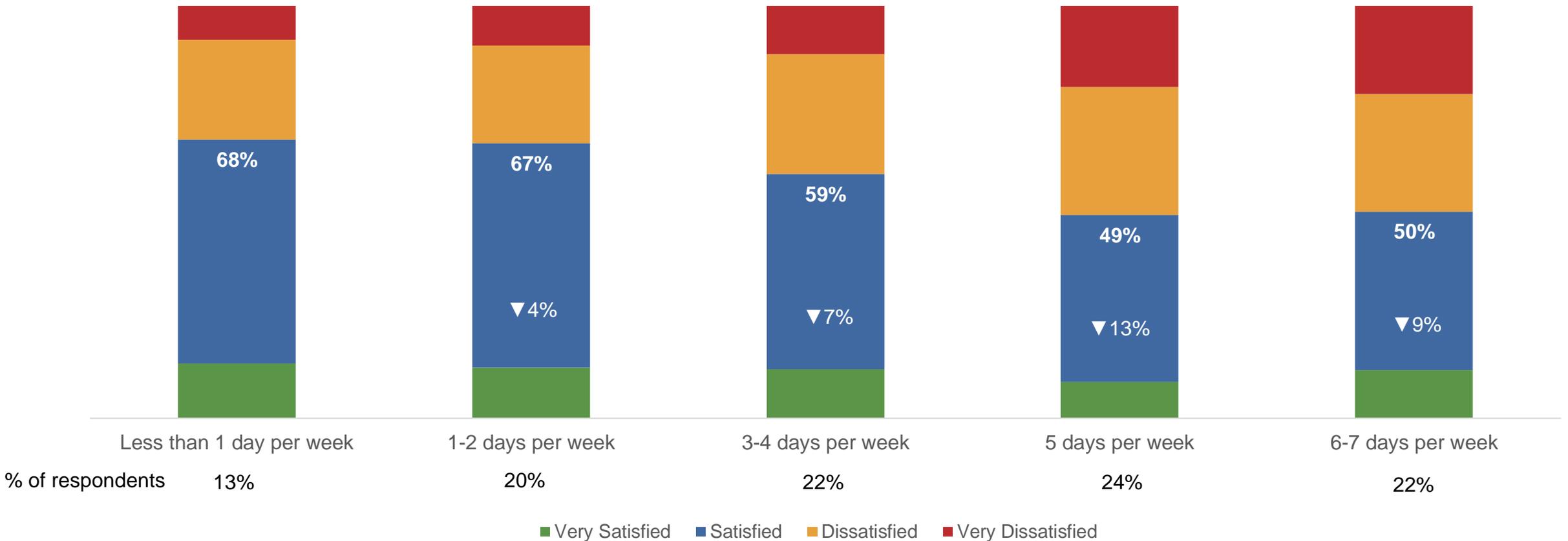
	Less than 1 day per week	1-2 days per week	3-4 days per week	5 days per week	6-7 days per week
Satisfied	68% ▼4%	67% ▼4%	59% ▼7%	49% ▼13%	50% ▼9%
% of respondents	13%	20%	22%	24%	22%

■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

MTA **Fall 2023 Customers Count Survey**

Question(s): In the last 6 months, how many days in a typical week did you use the following MTA services?
Note: Response options were reduced from Spring 2023 to Fall 2023
Base: Customers who use the Bus at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023

19

Bus attribute satisfaction levels (in order of importance)

Very Important Key Drivers

Attribute		Value
Service reliability	▼ 7%	50%
Waiting times	▼ 2%	44%
Frequency of delays	▼ 3%	46%

Important Key Drivers

Attribute	Value
Value for money	63%
Travel times	64%
Hours of operation	67%
Crowding on board buses	49%
Bus driver helpfulness	75%
Cleanliness on board buses	71%

Attribute Concepts
- ● Service
- ● Cleanliness
- ● Drivers
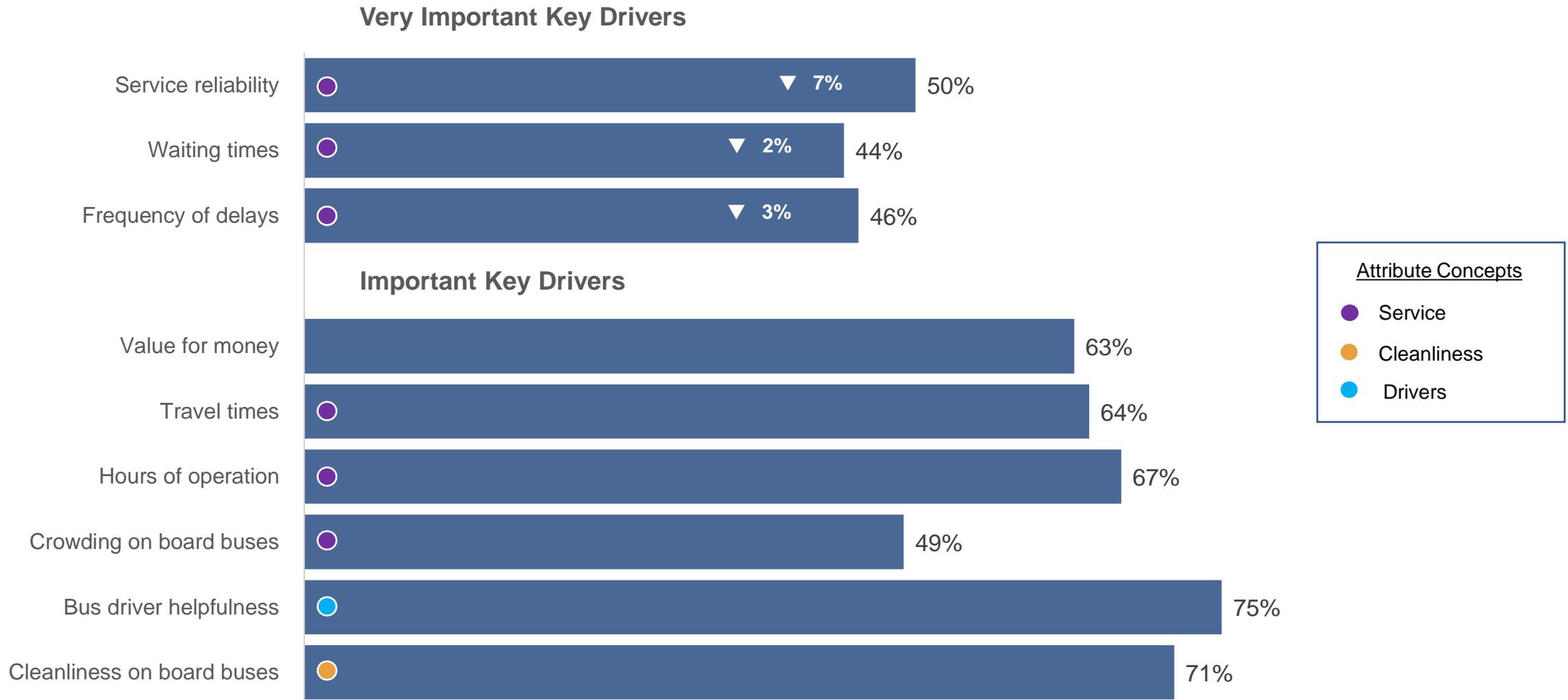
Question(s): How satisfied are you with the following attributes?
Base: Customers who used the bus in the past 6 months.
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023 of attributes whose wording did not change

Bus attribute satisfaction levels (lower importance attributes)

Lower importance attributes

Attribute	Change	Satisfaction
Crowding at bus stops	▲ 2%	63%
Announcements on board buses	▲ 1%	72%
Ramps	▲ 1%	79%
Location of bus stops	▲ 3%	83%
Safety from crime or harassment on board buses	▲ 5%	76%
Safety from accidents on board buses	▲ 3%	84%
Cleanliness of bus stops	▲ 4%	72%
Signs at bus stops	▲ 4%	80%
Fare payment options	▲ 4%	83%
Safety from crime or harassment at bus stops	▲ 7%	75%

Attribute Concepts

- ● Bus stops
- ● Announcements
- ● Safety/Security

Question(s): How satisfied are you with the following attributes?
Base: Customers who used the bus in the past 6 months.
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023 of attributes whose wording did not change

Overall Route Satisfaction by Borough

Local Bus Route Satisfaction
(65%, 69% in Spring)

Bronx: 62%
Brooklyn: 61% ▼ 6%
Manhattan: 76%
Queens: 64% ▼ 5%
Staten Island: 51% ▼ 10%

■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied
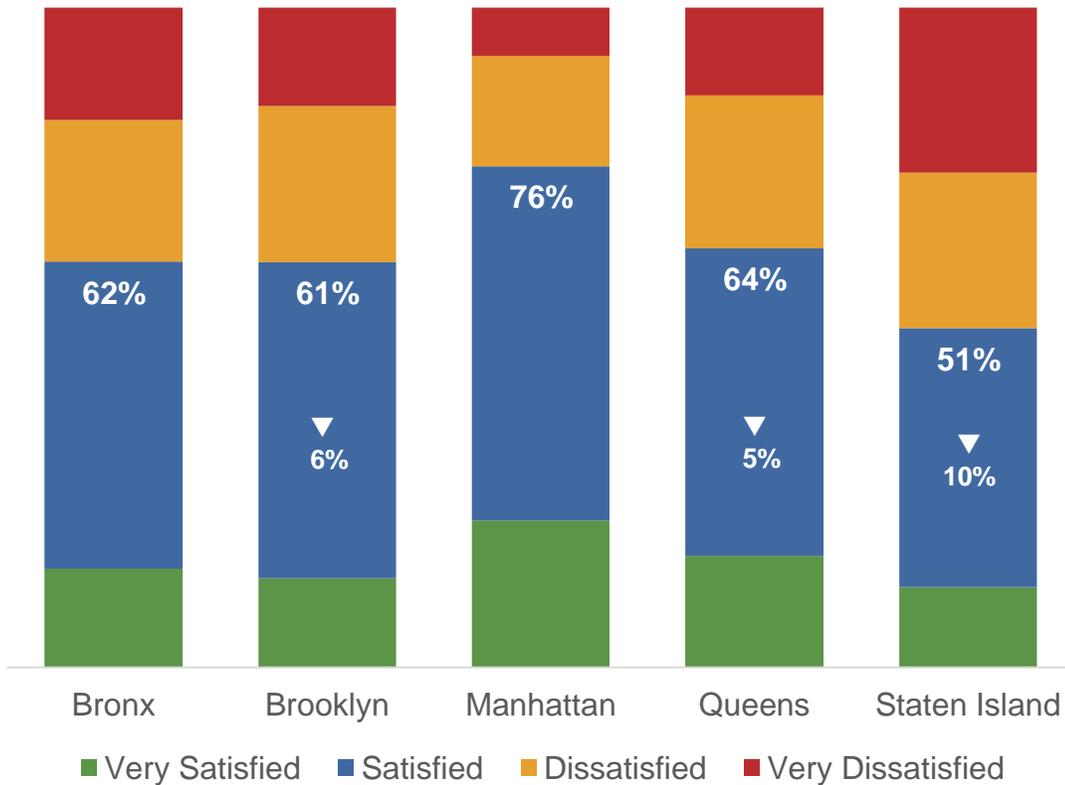
Express Bus Route Satisfaction
(80%, 82% in Spring)
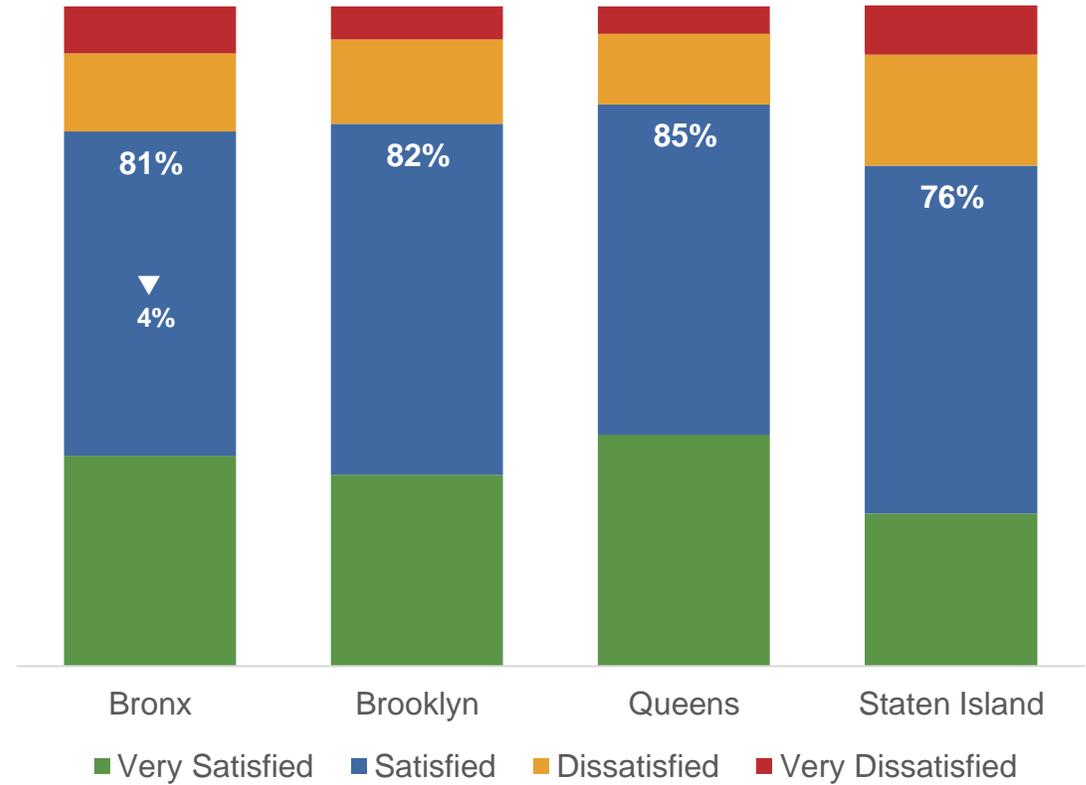
Bronx: 81% ▼ 4%
Brooklyn: 82%
Queens: 85%
Staten Island: 76%

■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

Question(s): In general, how satisfied are you with buses?
Base: Customers who use the bus at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023 of attributes whose wording did not change

22

Brooklyn customers are more likely to want to see improvements in Wait Times and Service Reliability; Bronx customers focus more on Crowding, Fare Evasion, and Cleanliness

What needs to improve to increase customer satisfaction by boarding borough (in order of overall percentage)

% of respondents

- Bronx 14%
- Brooklyn 25%
- Manhattan 20%
- Queens 37%
- Staten Island 3%

Fall 2023 Customers Count Survey

Question(s): Which of the following needs to improve to increase your bus satisfaction? Select up to three.
Base: Customers who use the bus at least once in the last 6 months
—— Indicates % chose answer among Total
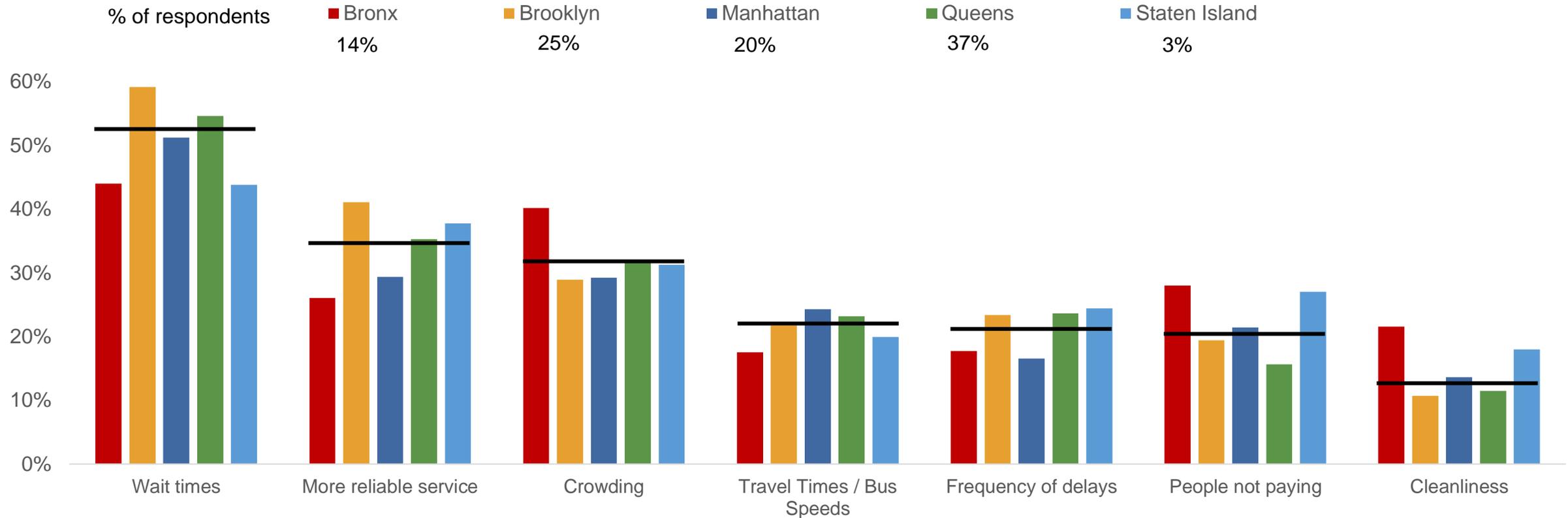
Overall satisfaction with Access-A-Ride

Access-A-Ride

Spring 2022	**61%**	
Fall 2022	**65%**	
Spring 2023	**64%**	
Fall 2023	**68%**	

Fall 2023
Customers Count Survey

Question(s): In general, how satisfied are you with Access-A-Ride?
Base: Customers who have used Access-A-Ride at least once in the last 6 months

24
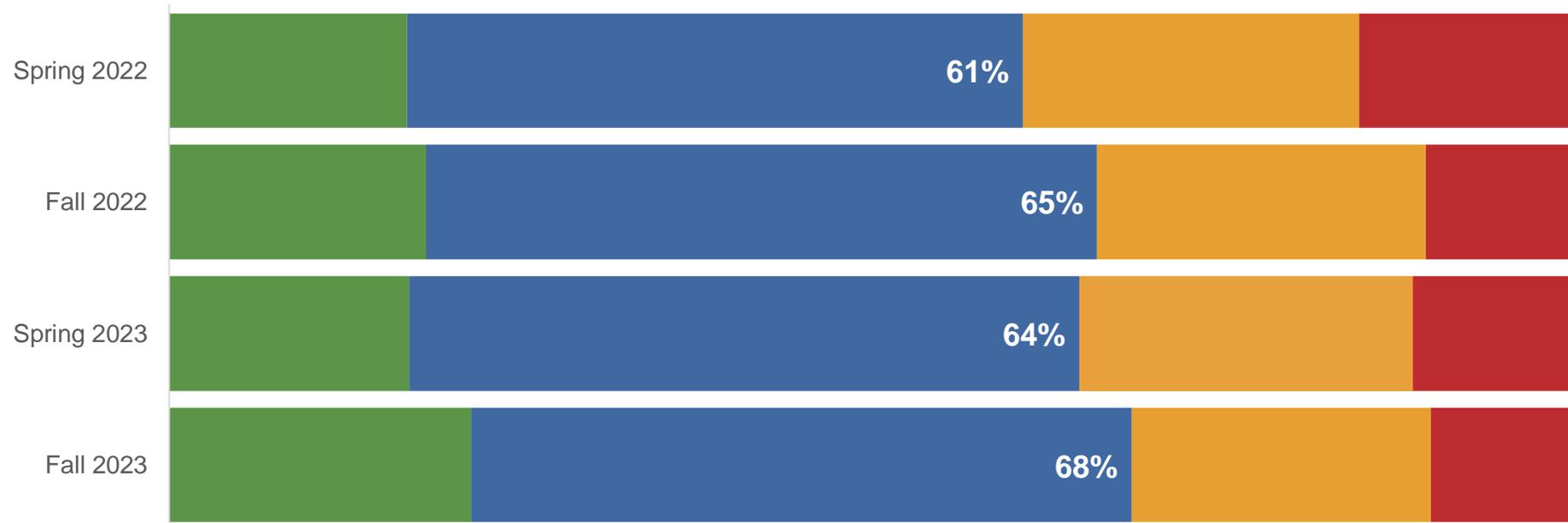
AAR Customer Satisfaction by Frequency and Home Borough

Trip Frequency (weekly)

	<1 day	1-2 days	3-4 days	5+ days
Satisfied	68%	71%	69% ▲ 5%	63%
% of respondents	22%	31%	25%	22%

Home Borough (based on zip)

	Bronx	Brooklyn	Manhattan	Queens	Staten Island
Satisfied	69% ▲ 5%	67% ▲ 6%	68%	67%	77%
% of respondents	22%	31%	16%	23%	7%

■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

Question: In general, how satisfied are you with Access-A-Ride?
Base: Customers who have used Access-A-Ride at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023 of attributes whose wording did not change

AAR attribute satisfaction levels (in order of importance)

Extremely Important Key Drivers

On time pick up	▲ 8%	59%

Very Important Key Drivers

Travel times	▲ 4%	74%
Frequency of no shows		55%

Important Key Drivers

Being able to get a ride for the day or time of your request	▲ 6%	80%
Driver courtesy and professional behavior		80%
Drivers' ability to drive safely		84%
Ability to communicate with your driver during your trip		72%
Personal security		86%
Lifts or ramps		83%

Attribute Concepts
- ● Service
- ● Reserving trips
- ● Drivers
- ● Safety

Question(s): In general, how satisfied are you with Access-A-Ride?
Base: Customers who used AAR in the past 6 months.
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023 of attributes whose wording did not change

Satisfaction with Important Attributes by Vehicle Type

Overall AAR Satisfaction

On Time Pick Up

Travel Times
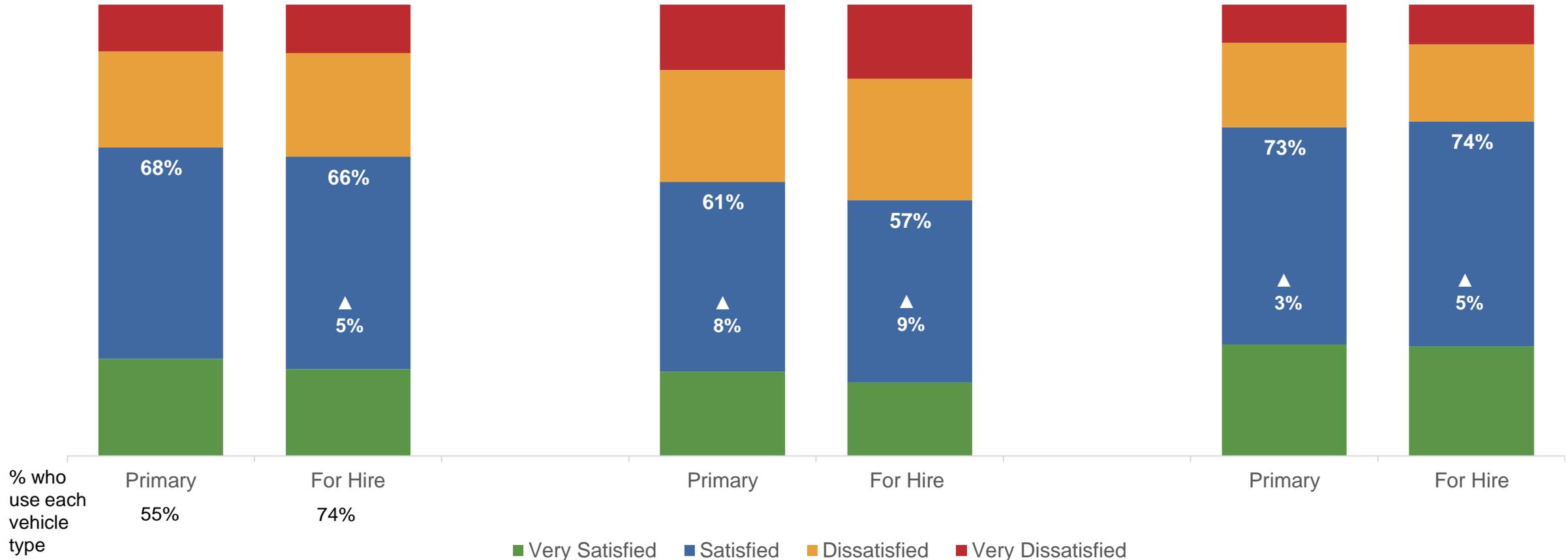
% who use each vehicle type

Primary 55% For Hire 74%

Primary For Hire

Primary For Hire

68% 66% ▲5%

61% ▲8% 57% ▲9%

73% ▲3% 74% ▲5%

■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

Question(s): In general, how satisfied are you with Access-A-Ride?
Base: Customers who have used Access-A-Ride at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2023 of attributes whose wording did not change

Dissatisfied customers are more likely to want improvements in Service Reliability; Satisfied customers want flexibility

What needs to improve to increase AAR customer satisfaction, by overall AAR satisfaction level
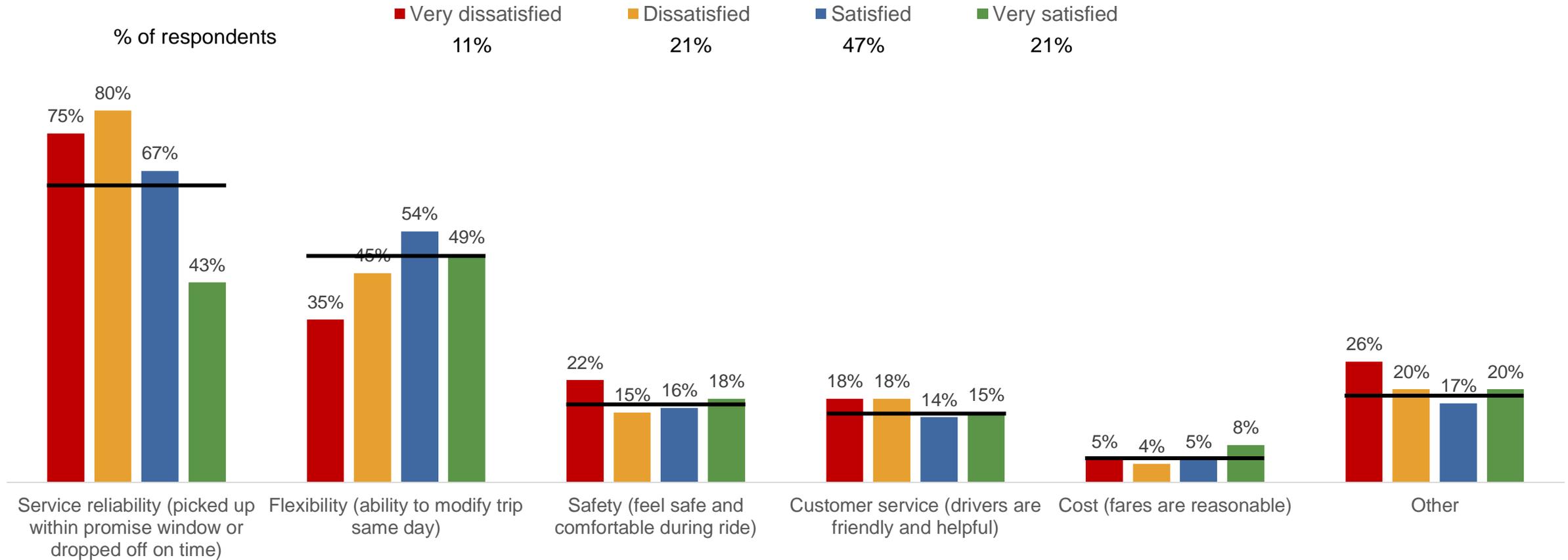
% of respondents

■ Very dissatisfied 11% ■ Dissatisfied 21% ■ Satisfied 47% ■ Very satisfied 21%

Service reliability (picked up within promise window or dropped off on time): 75%, 80%, 67%, 43%

Flexibility (ability to modify trip same day): 35%, 45%, 54%, 49%

Safety (feel safe and comfortable during ride): 22%, 15%, 16%, 18%

Customer service (drivers are friendly and helpful): 18%, 18%, 14%, 15%

Cost (fares are reasonable): 5%, 4%, 5%, 8%

Other: 26%, 20%, 17%, 20%

Question(s): Which of the following needs to improve to increase your AAR satisfaction? Select up to three.
Base: Customers who use the bus at least once in the last 6 months
⎯⎯ Indicates % chose answer among Total