



**Spring 2023**

**Customers Count Survey**

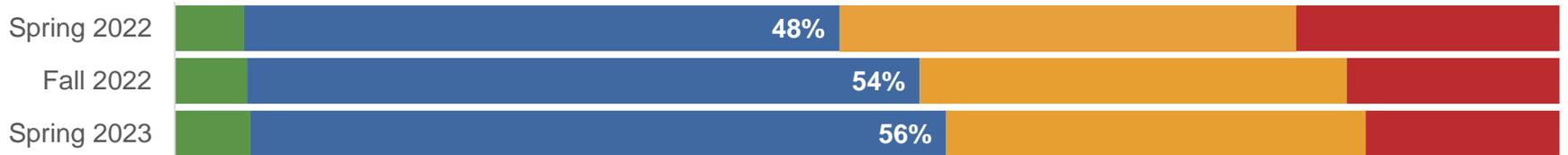
**New York City Transit and MTA Bus  
Subway • Bus • Access-A-Ride**

# Executive Summary - NYCT

- The Spring bi-annual survey was open May 15<sup>th</sup> – 30<sup>th</sup>, 2023, and offered in nine languages and by telephone. We received more than 110,000 subway line, 25,000 bus route and 3,000 AAR evaluations from over 80,000 NYCT customers responding.
- **Subway customer satisfaction is 56%**, a two percentage point increase from the Fall and an eight-point gain from Spring 2022.
  - Since the Fall survey in November there are meaningful gains in customers feeling safe on trains and in stations, with safety on trains up four percentage points to 50% and in stations up seven percentage points to 48%.
  - Respondents most commonly selected ‘erratic behavior on trains’ as the most important attribute linked to satisfaction; however, less than a third of customers are satisfied with the level of erratic behavior. Service reliability is the next most important item for customers, and more than half are satisfied (56%).
  - The top performing lines are the Q (up 4 to 64%), the L (up 3 to 63%), the 7 (62%) and G (61%)
- **Local, Limited and Select Bus customer satisfaction levels are 65%**, a marginal increase from Fall (64%). Bronx, Brooklyn, and Queens customer satisfaction all increased 3 points.
  - Scores on the most important attributes of *Wait Time* and *Service Reliability* improved marginally, while *Travel Times* (third in importance) increased 3 points to 64%.
  - Express Bus customer satisfaction remained high at 79%.
- **Access-A-Ride customer satisfaction scores decreased marginally, from 65% to 64%**
  - Satisfaction with the two highest importance attributes remained flat or decreased: *On Time Pick Up* (down 4 pts.) and *My Ride Shows Up* (stayed the same)

# NYCT: Overall Satisfaction Trends

## Subway



## Local, Limited and Select Bus



## Express Bus



## Access-A-Ride



■ Very Satisfied   ■ Satisfied   ■ Dissatisfied   ■ Very Dissatisfied

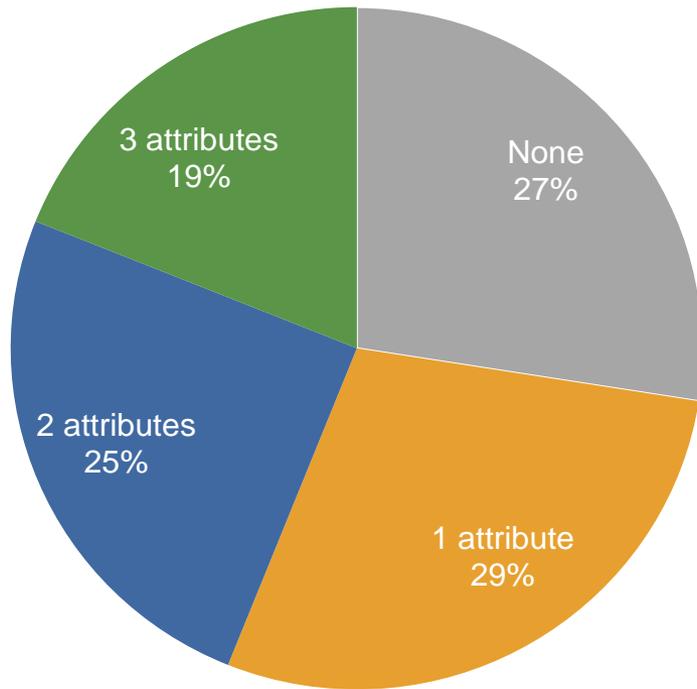


# Personal security attributes remain the largest drivers of subway satisfaction

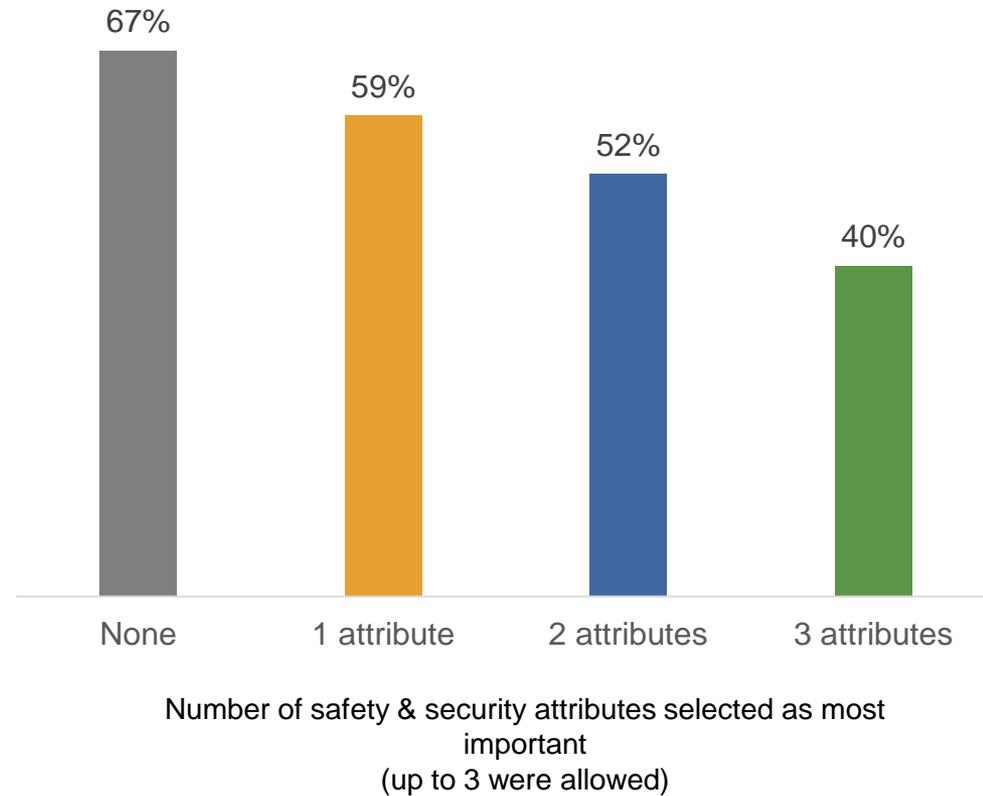
|                                | Top Ranking Key Drivers                                 | Spring 2023 Rank<br>(with percentage of respondents selecting) | Fall 2022 Rank<br>(with percentage of respondents selecting) |
|--------------------------------|---|--|--|
| Extremely Important Attributes | People behaving erratically <b>on board trains</b>      | 1 <sup>st</sup> (27%)  | 4 <sup>th</sup> (24%)  |
|                                | Service reliability                                     | 2 <sup>nd</sup> (24%)  | 3 <sup>rd</sup> (25%)  |
| Very Important Attributes      | Personal security <b>on board trains</b>                | 3 <sup>rd</sup> (22%)  | 1 <sup>st</sup> (tie) (28%)                                  |
|                                | Waiting times   | 4 <sup>th</sup> (tie) (20%)                                    | 5 <sup>th</sup> (19%)  |
|                                | People experiencing homelessness <b>on board trains</b> | 4 <sup>th</sup> (tie) (20%)                                    | 6 <sup>th</sup> (tie) (18%)                                  |
|                                | Personal security <b>in stations</b>                    | 4 <sup>th</sup> (tie) (20%)                                    | 1 <sup>st</sup> (tie) (28%)                                  |
|                                | People behaving erratically <b>in stations</b>          | 7 <sup>th</sup> (19%)  | 6 <sup>th</sup> (tie) (18%)                                  |

# Respondents who select multiple areas of safety/security are less satisfied with overall subway service

# of safety/security attributes selected of their top 3 overall



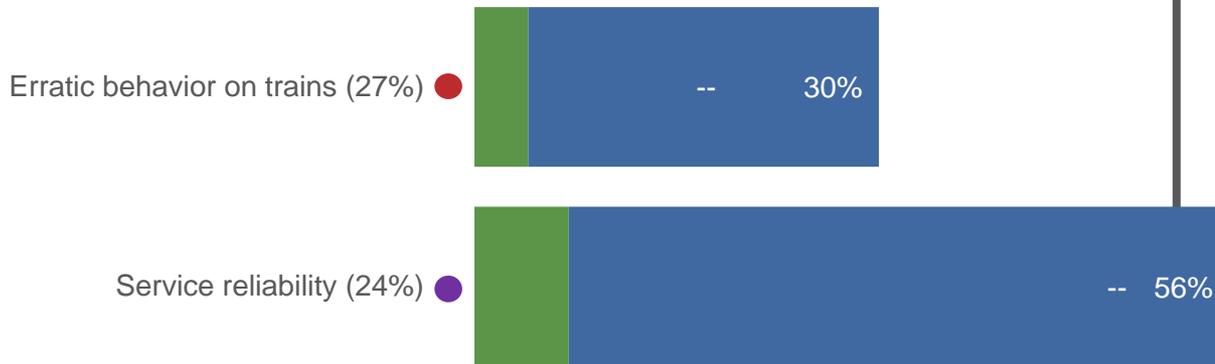
Overall Satisfaction, by number of safety & security attributes selected as most important



# Key Drivers of Overall Subway Satisfaction

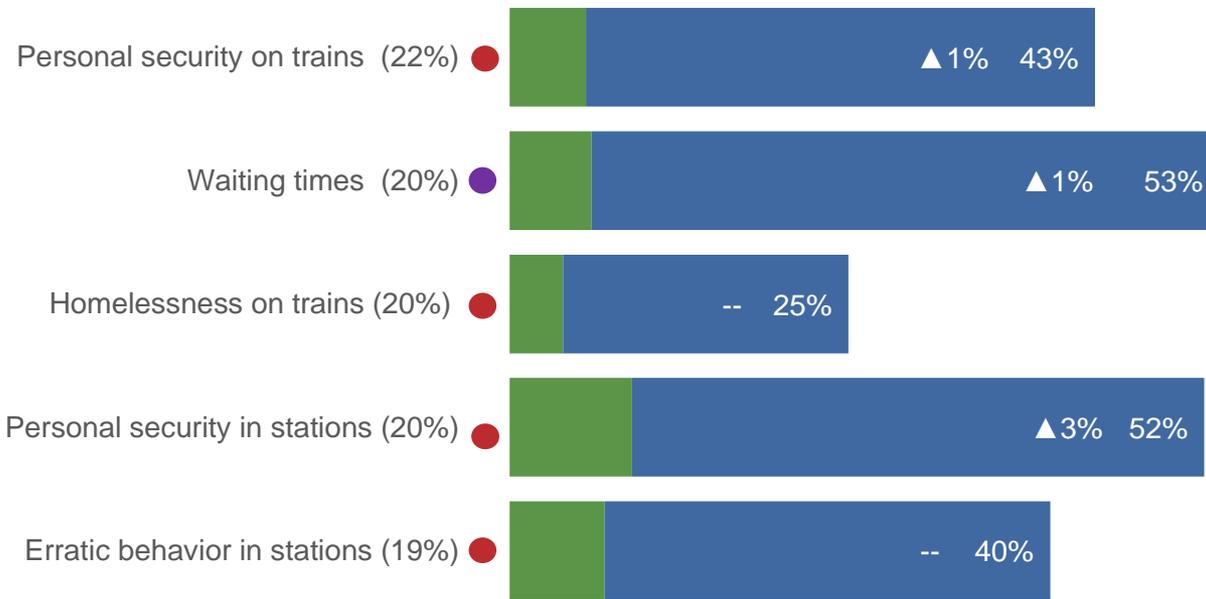
Percentage of satisfied + very satisfied customers (in order of importance)

## Extremely Important Key Drivers



◀ Average Attribute Satisfaction

## Very Important Key Drivers



### Attribute Concepts

- Service
- Safety and Security

Among Current Customers using at least once per year; Percentage of Total Satisfied (Rated 6-10)  
 ▲/▼ indicate a percentage point increase/decrease since Fall; -- indicates no percentage point change

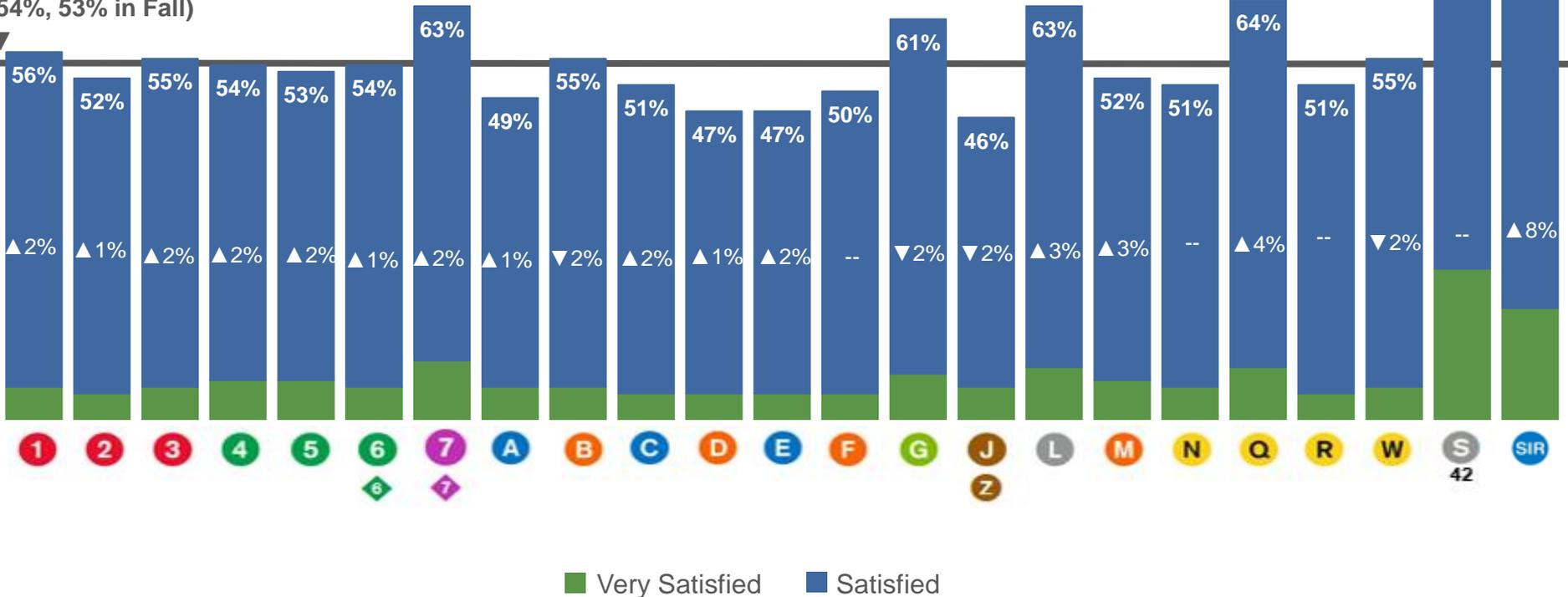
# Subway: Overall Satisfaction On Board Rates by Line

Percentage of satisfied + very satisfied customers

**Ranking**      **Fall 22**      **Spring 23**

1<sup>st</sup>      G      Q  
 2<sup>nd</sup>      7      L  
 3<sup>rd</sup>      Q L      7

Spring 2023  
 Overall Subway Line  
 Satisfaction Rate  
 (54%, 53% in Fall)

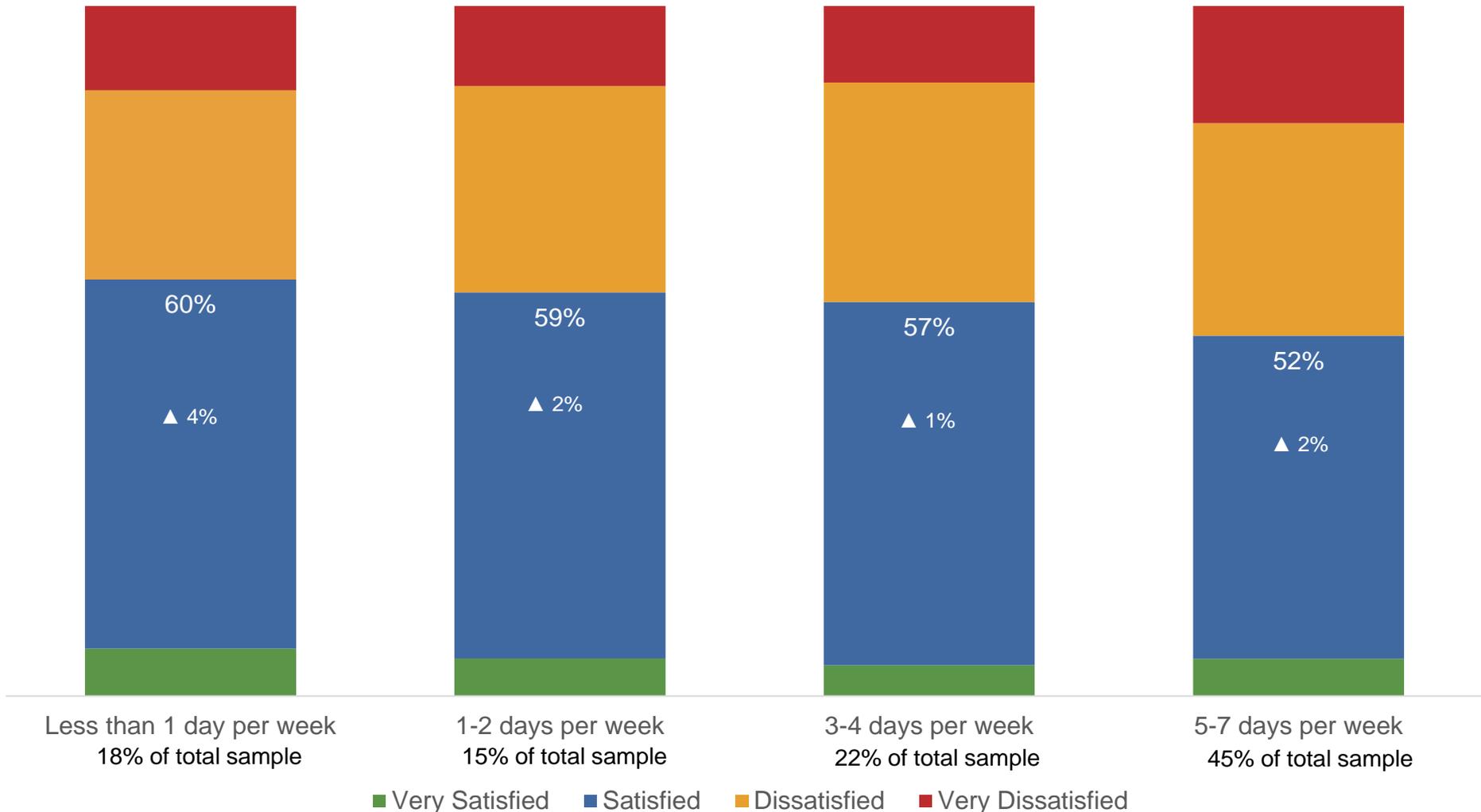


■ Very Satisfied    ■ Satisfied

▲/▼ indicate a percentage point increase/decrease since Fall

# Subway Experience Satisfaction Rates, by Frequency of Ridership

Percentage of satisfied + very satisfied customers



# Subway Attribute Importance 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                                      |
|---|--|--|--|
| People behaving erratically on board trains (28%) | People behaving erratically on board trains (29%)      | People behaving erratically on board trains (29%)      | Service reliability (26%)                              |
| Personal security in stations (27%)               | Personal security on board trains (24%)                | Service reliability (26%)                              | People behaving erratically on board trains (25%)      |
| Personal security on board trains (27%)           | Personal security in stations (23%)                    | Waiting times (22%)                                    | Waiting times (23%)                                    |
| People behaving erratically in stations (21%)     | Service reliability (23%)                              | Personal security on board trains (22%)                | People experiencing homelessness on board trains (21%) |
| Service reliability (20%)                         | People experiencing homelessness on board trains (20%) | People experiencing homelessness on board trains (19%) | Personal security on board trains (19%)                |

# Satisfaction with Station Staff of Stations with Customer Service Center

Percentage of satisfied + very satisfied customers for stations with a sample size of 100 or more

| Stations with Customer Service Center     | Station Staff Rating<br>Fall 2022<br>(overall 63%) | Station Staff Rating<br>Spring 2023<br>(overall 63%) |
|---|--|--|
| Myrtle-Wyckoff Avs (LM)                   | 61%  | 71%*   |
| Fulton St (2345ACJZ)                      | 68%  | 69%  |
| 34 St-Penn Station (123)                  | 62%  | 66%*   |
| Atlantic Av-Barclays Ctr<br>(2345BQDNR)   | 65%  | 66%  |
| Coney Island-Stillwell Av (DFNQ)          | 60%  | 66%  |
| Flushing-Main St (7)                      | 61%  | 63%  |
| 74 St-Jackson Hts-Roosevelt Av<br>(7EFMR) | 59%  | 57%  |
| Fordham Rd (4)                            | 51%  | 58%  |
| 161 St-Yankee Stadium (4BD)               | 58%  | 58%  |
| 125 St (456)                              | 54%  | 48%  |

\*Note: Indicates where change is statistically significant at a 95% confidence level

# Overall Subway Station Satisfaction

Percentage of satisfied + very satisfied customers for stations with a sample size of 100 or more

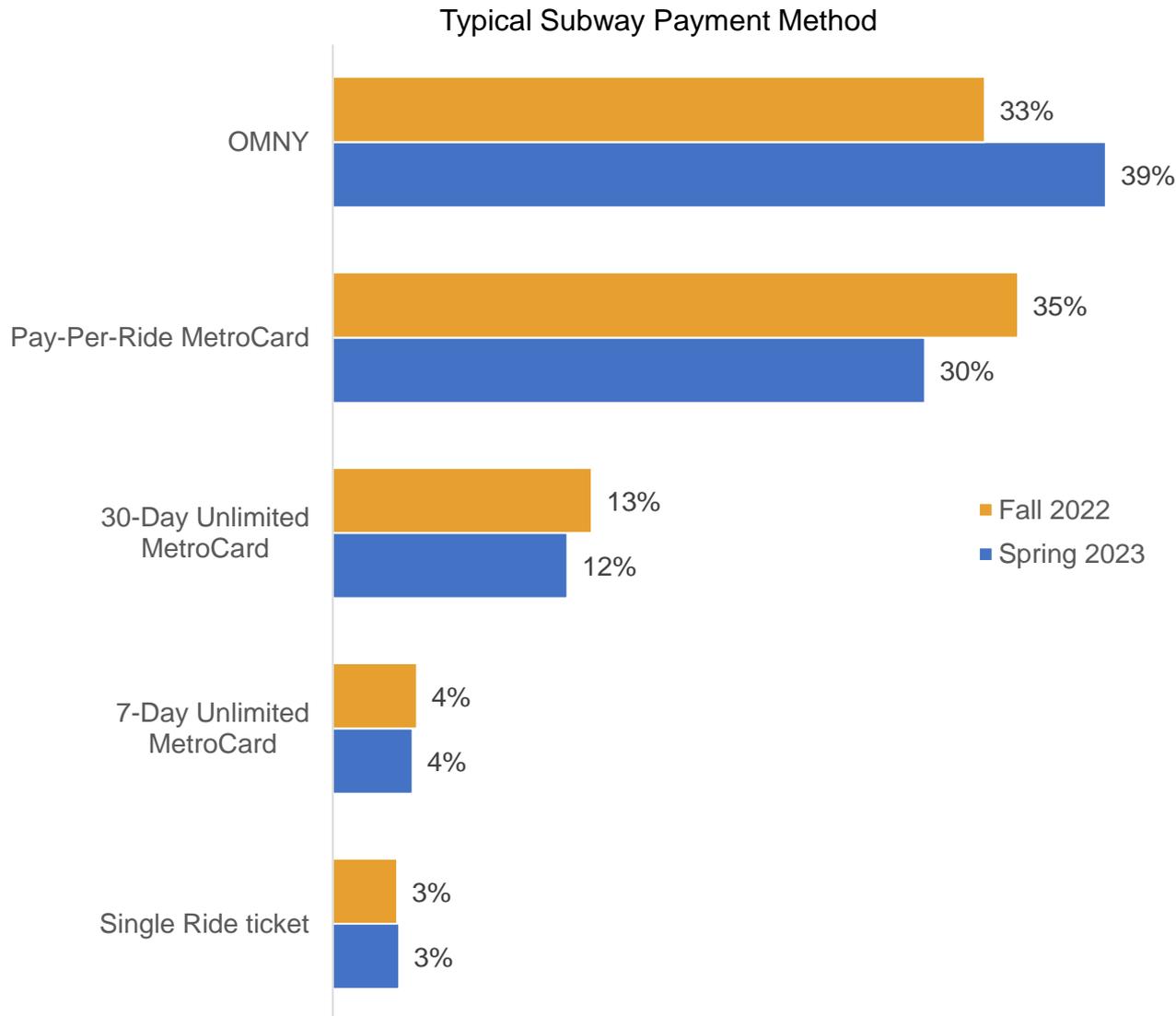
| Stations which have undergone<br>“Re-NEW-ation” | Overall Station Satisfaction |                           |
|---|------------------------------|---------------------------|
|   | Fall 2022 (overall 59%)      | Spring 2023 (overall 61%) |
| Vernon Blvd-Jackson Av (7)                      | 73%                          | 76%                       |
| Cortelyou Rd (Q)                                | 66%                          | 73%                       |
| <i>Court Sq (7G) / Court Sq-23 St (EM)</i>      | 71%                          | 72%                       |
| DeKalb Av (L)                                   | 61%                          | 68%                       |
| 8 Av (L)  | 67%                          | 68%                       |
| 5 Av (7)  | 68%                          | 65%                       |
| <i>Atlantic Av-Barclays Ctr (2345BQDNR)</i>     | 62%                          | 62%                       |
| Grand St (BD)                                   | 41%                          | 53%*                      |
| <i>Canal St (6JZNQRW)</i>                       | 46%                          | 47%                       |
| <i>Sutphin Blvd-Archer Av/JFK Airport (EJZ)</i> | 45%                          | 46%                       |
| <i>Delancey St-Essex St (FJZM)</i>              | 42%                          | 42%                       |

Note: Italics indicates that only a portion of the complex was included in the Re-NEW-ation  
13 Stations that were renewed are left out of this table due to insufficient sample size

\*Indicates where change is statistically significant at a 95% confidence level

# Typical Subway Payment Method & Satisfaction Scores

Percentage of satisfied + very satisfied customers by typical payment method



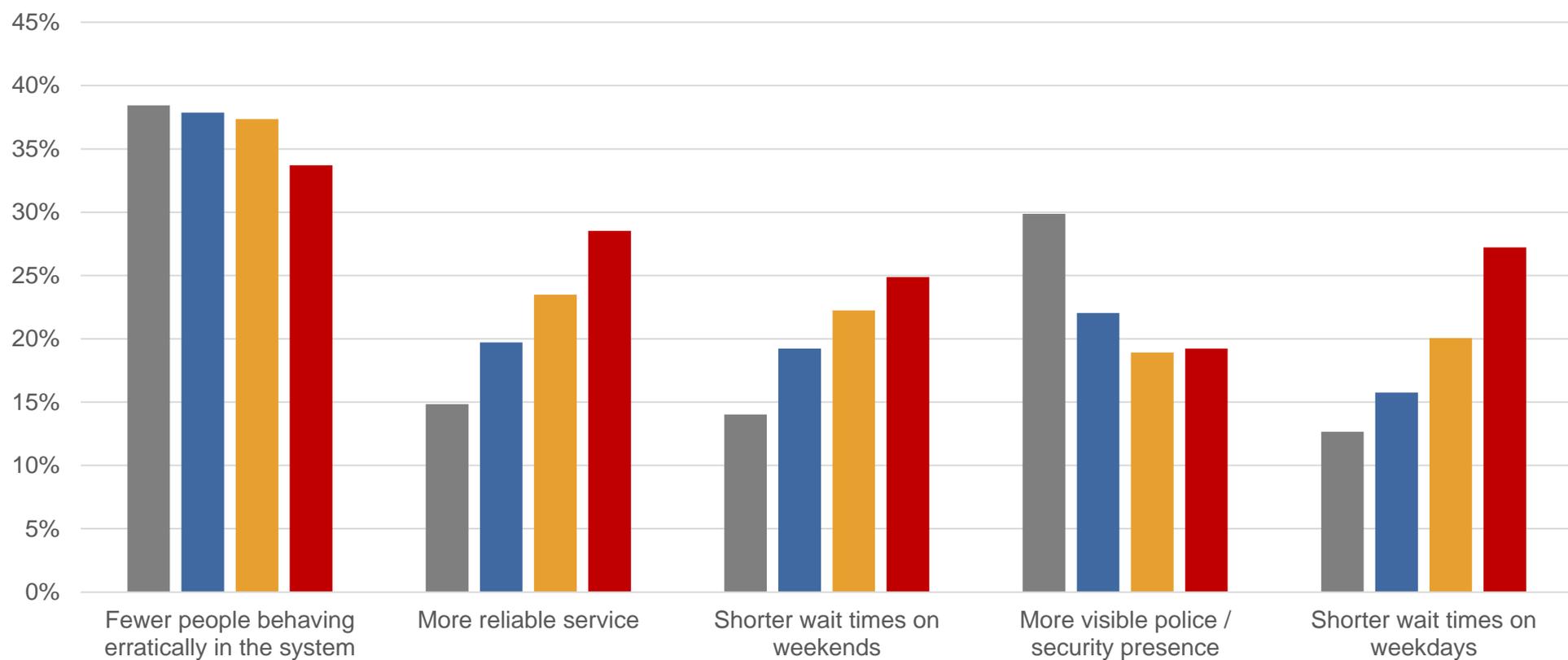
| Satisfied with Fare Payment Options (Spring 2023) |
|---|
| 79%   |
| 69%   |
| 65%   |
| 61%   |
| 69%   |



# Subways - 'What would encourage you to use more often?'

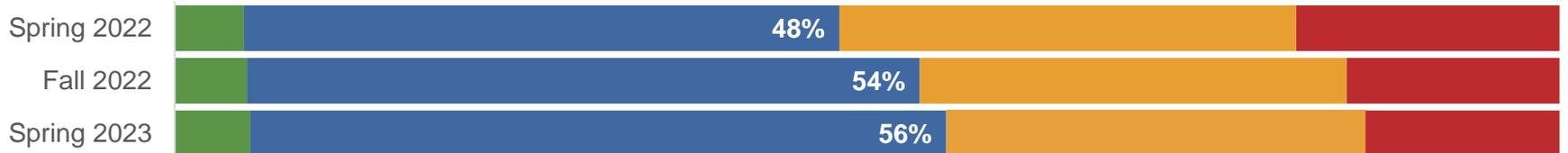
Percentage of responses by subway use frequency (in order of overall percentage)

■ Less than 1 day per week 18% of total sample   ■ 1-2 days per week 15% of total sample   ■ 3-4 days per week 22% of total sample   ■ 5-7 days per week 45% of total sample

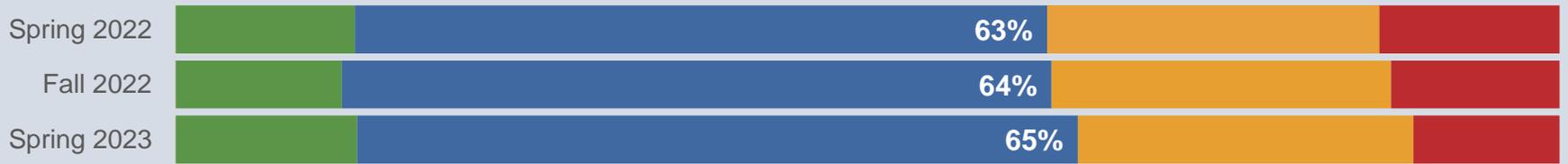


# NYCT: Overall Satisfaction Trends

## Subway



## Local, Limited and Select Bus



## Express Bus



## Access-A-Ride



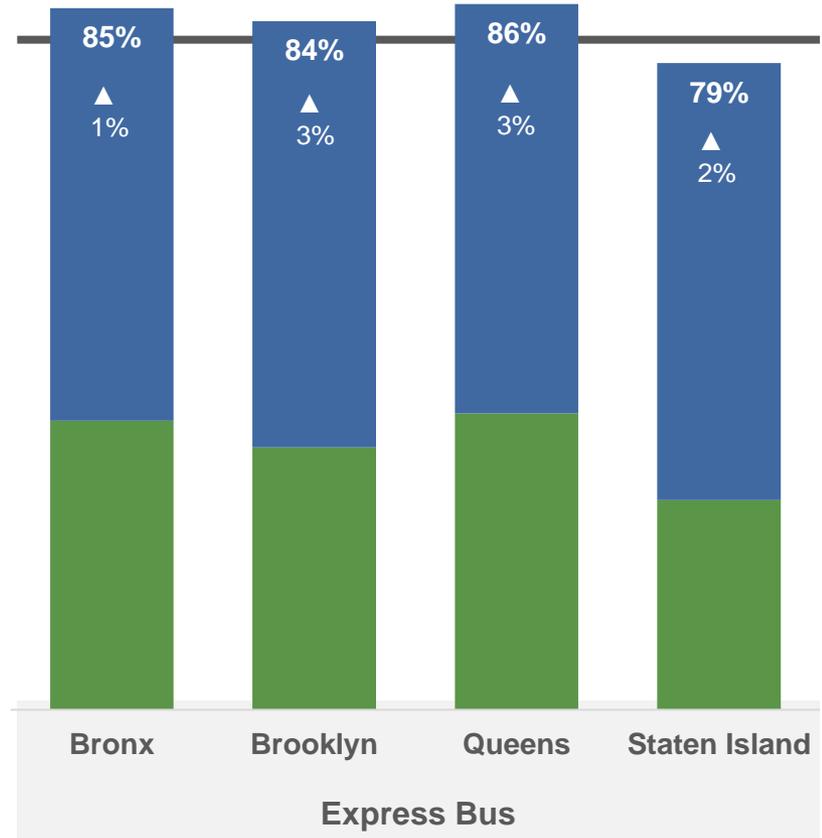
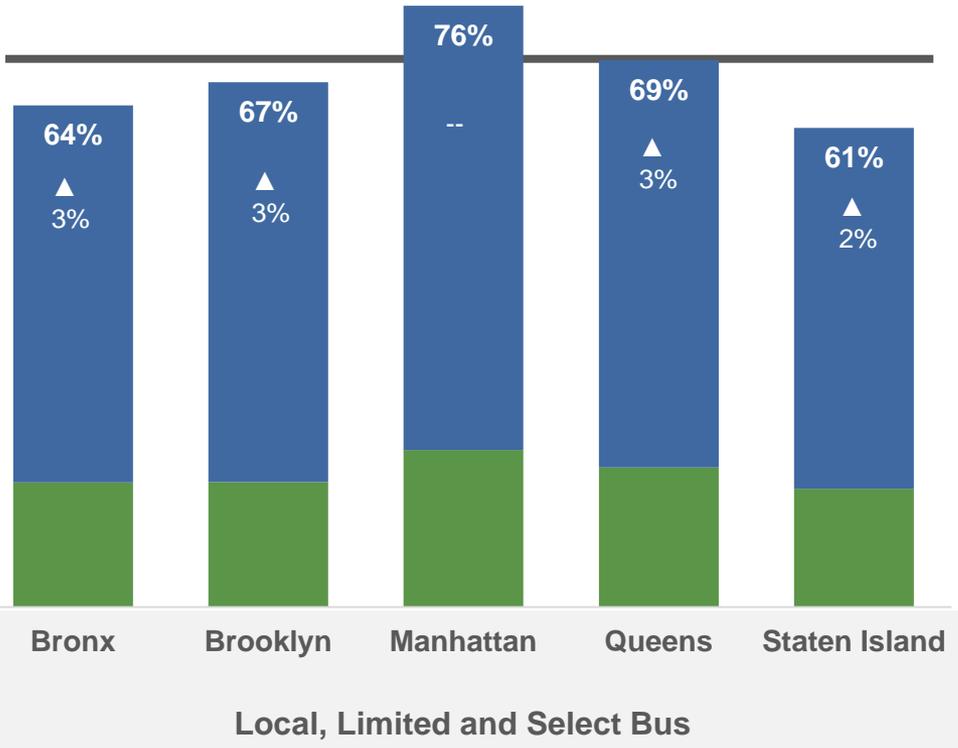
■ Very Satisfied  
 ■ Satisfied  
 ■ Dissatisfied  
 ■ Very Dissatisfied

# Bus Route Overall Satisfaction Rates By Borough

Percentage of satisfied + very satisfied customers

Spring 2023  
Overall Local, Limited and Select Bus Route  
Satisfaction Rate  
(69% in Spring 2023, 66% in Fall 2022)

Spring 2023  
Overall Express Bus Route  
Satisfaction Rate  
(82%, 80% in Fall)



Very Satisfied Satisfied

# Bronx Bus Redesign: Overall Route Satisfaction

Only showing routes with 50 or more evaluations\*

| Route        | May 2023 Avg Weekday Ridership | Spring 2022 | Fall 2022  | Spring 2023 |
|--------------|--------------------------------|-------------|------------|-------------|
| M100         | 5,150                          | 68%         | 57%        | <b>73%</b>  |
| Bx36         | 8,950                          | 60%         | 66%        | <b>70%</b>  |
| Bx11         | 5,100                          | 59%         | 62%        | <b>70%</b>  |
| Bx40         | 3,850                          | 48%         | 58%        | <b>53%</b>  |
| Bx41 SBS     | 7,200                          | 65%         | 66%        | <b>66%</b>  |
| Bx4/4A       | 4,300                          | 55%         | 55%        | <b>56%</b>  |
| Bx35         | 5,100                          | 58%         | 56%        | <b>55%</b>  |
| Bx15         | 3,950                          | 54%         | 45%        | <b>53%</b>  |
| <b>Total</b> |                                | <b>60%</b>  | <b>59%</b> | <b>61%</b>  |

**Routes improved since Spring 2022**

~13% of annual Bronx local bus ridership

**Routes largely unchanged since Spring 2022**

~14% of annual Bronx local bus ridership

~40% of annual Bronx local bus ridership

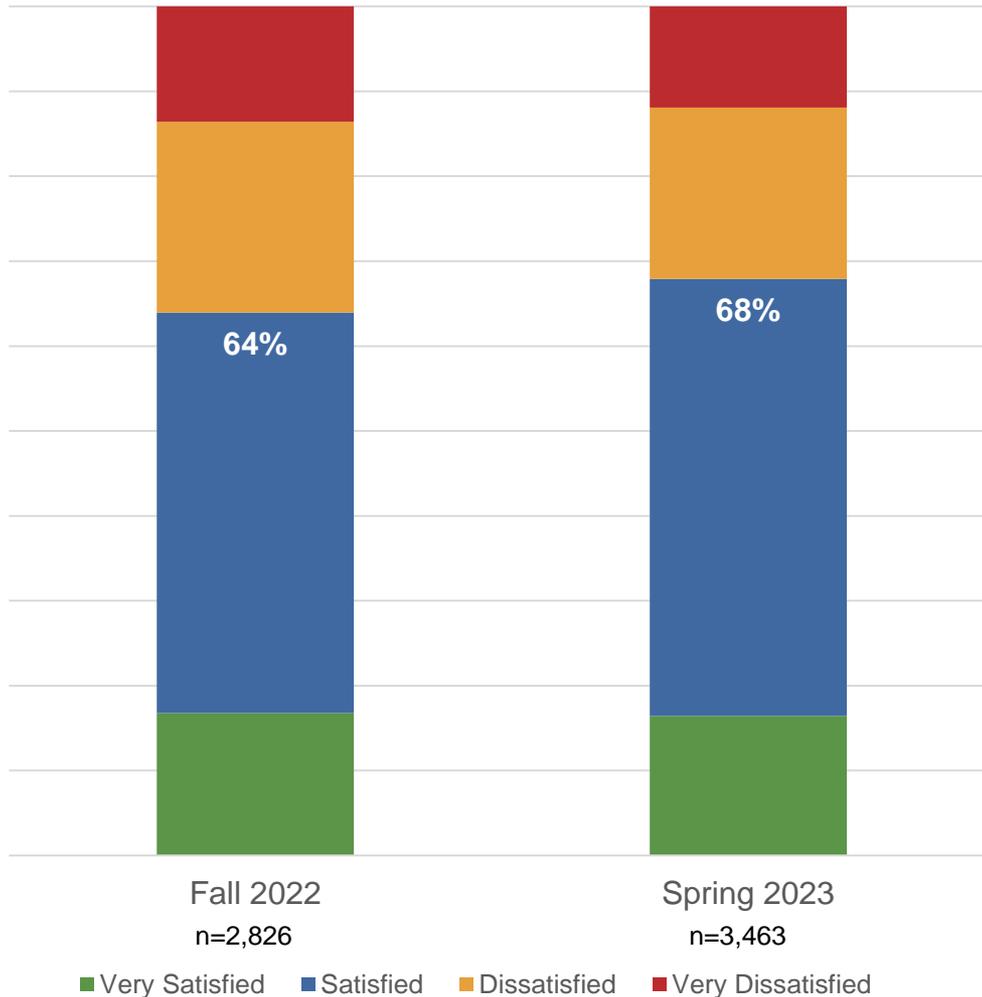
\*Bx13, Bx38, Bx42, Q50, Bx23, Bx18, Bx24, Bx29, Bx30 have a sample <50 but are included in the Total. Totals are weighted by ridership



# 29 Priority Bus Routes

Overall route satisfaction (very satisfied + satisfied)

## 29 Priority Routes Overall Route Satisfaction in Aggregate and by Route



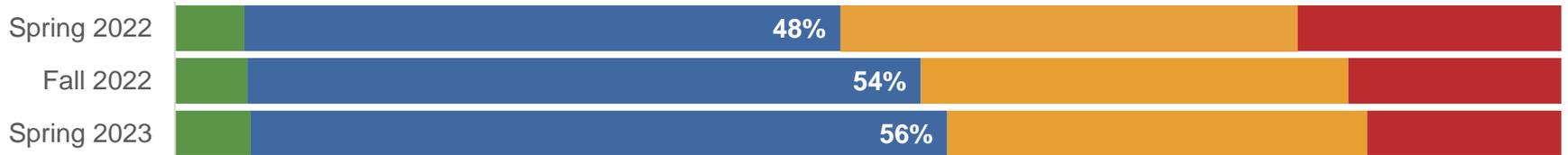
| Route  | Borough       | Sample | Fall | Spring |
|--------|---------------|--------|------|--------|
| Bx1    | Bronx         | 174    | 68%  | 74%    |
| Bx2    | Bronx         | 122    | 63%  | 70%    |
| Bx19   | Bronx         | 139    | 50%  | 53%    |
| Bx21   | Bronx         | 73     | 50%  | 47%    |
| Bx39   | Bronx         | 72     | 54%  | 63%    |
| Q54    | Brooklyn      | 77     | 49%  | 52%    |
| B8     | Brooklyn      | 109    | 60%  | 66%    |
| B15    | Brooklyn      | 106    | 45%  | 59%    |
| B41    | Brooklyn      | 199    | 64%  | 68%    |
| B46    | Brooklyn      | 89     | 69%  | 63%    |
| M7     | Manhattan     | 194    | 70%  | 79%    |
| M11    | Manhattan     | 239    | 68%  | 71%    |
| M101   | Manhattan     | 276    | 73%  | 72%    |
| M102   | Manhattan     | 146    | 73%  | 75%    |
| M34SBS | Manhattan     | 216    | 69%  | 72%    |
| M60SBS | Manhattan     | 305    | 75%  | 76%    |
| Q6     | Queens        | 41     | 48%  | 34%    |
| Q8     | Queens        | 58     | 45%  | 69%    |
| Q23    | Queens        | 83     | 62%  | 64%    |
| Q25    | Queens        | 108    | 67%  | 65%    |
| Q41    | Queens        | 32     | 44%  | 63%    |
| Q60    | Queens        | 211    | 70%  | 73%    |
| Q65    | Queens        | 94     | 57%  | 63%    |
| Q66    | Queens        | 87     | 69%  | 69%    |
| S46    | Staten Island | 35     | 50%  | 63%    |
| S48    | Staten Island | 44     | 41%  | 55%    |
| S74    | Staten Island | 24     | 61%  | 50%    |
| S78    | Staten Island | 35     | 48%  | 60%    |
| S79SBS | Staten Island | 75     | 60%  | 68%    |

Priority routes improved 8% on average  
(all routes improved 3% on average)



# NYCT: Overall Satisfaction Trends

## Subway



## Local, Limited and Select Bus



## Express Bus



## Access-A-Ride



■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

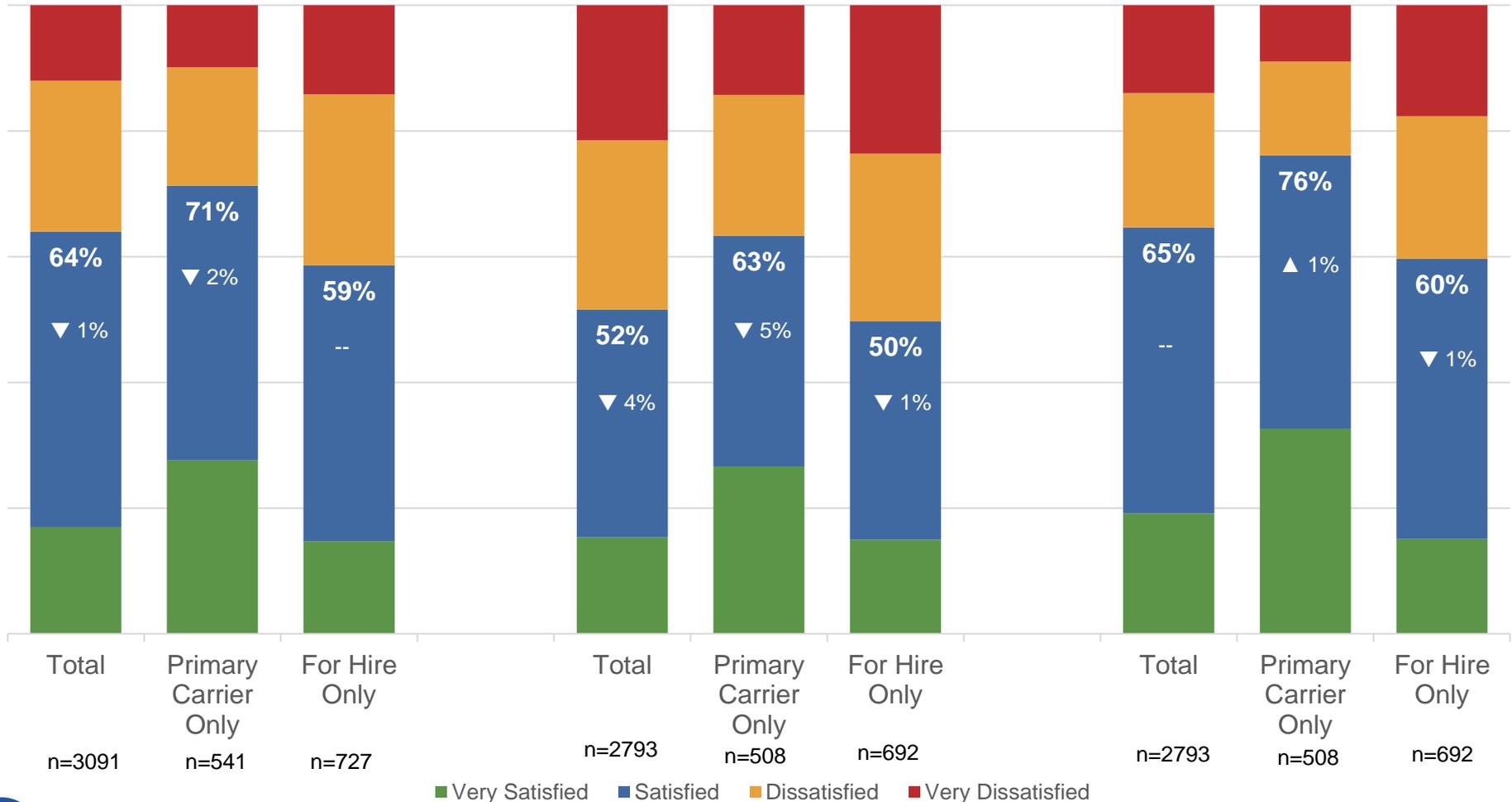
# Access-A-Ride Satisfaction by Vehicle Type

Percentage of satisfied + very satisfied customers

## Overall AAR Satisfaction

## On Time Pick Up

## My Ride Shows Up



■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied



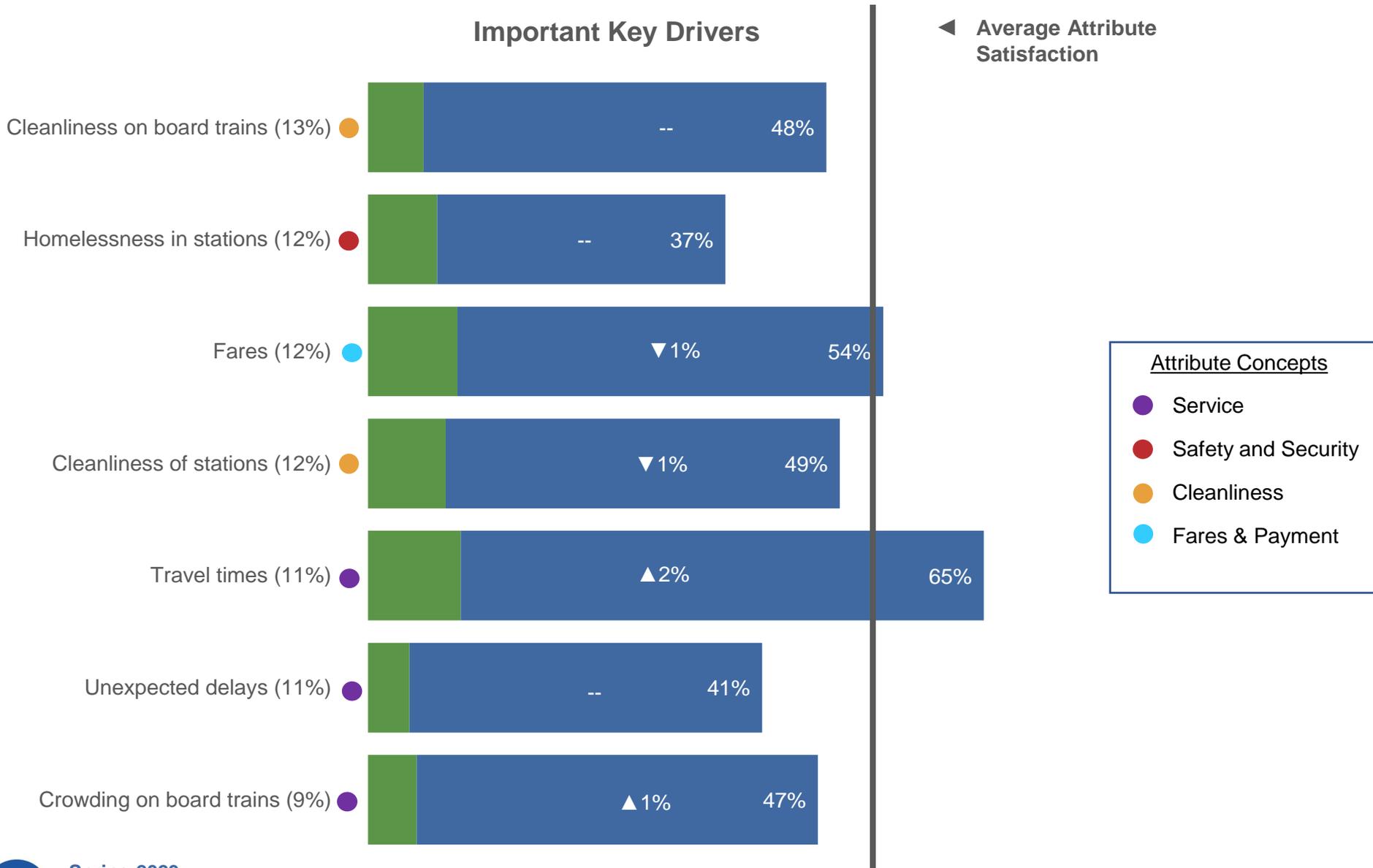
# How we use this research

- Detailed discussion with senior leaders
  - Subways – GSMs, route leaders, operations planning
  - Buses – depot leaders, operations planning
  - Customer Comms – exec team, app strategy
  - NYPD discussion of safety perceptions in trains, stations, platforms
- OMNY marketing planning
- Additional ad-hoc requests (sample below)
  - Fare-free bus pilot
  - Weekend service tactics
  - Real-time travel information options

## Appendix

# Additional Key Drivers of Overall Subway Satisfaction

Percentage of satisfied + very satisfied customers (in order of importance)



Among Current Customers using at least once per year; Percentage of Total Satisfied (Rated 6-10)

▲/▼ indicate a percentage point increase/decrease since Fall; -- indicates no percentage point change

# Highest Rated Subway Stations

Percentage of satisfied + very satisfied customers for stations with a sample size of 100 or more

| Five Highest Rated Stations     | GSM Zone | May 2023 Average Weekday Ridership | Overall Station Rating Spring 2022 | Overall Station Rating Fall 2022 | Overall Station Rating Spring 2023 |
|---------------------------------|----------|------------------------------------|------------------------------------|----------------------------------|------------------------------------|
| 96 St Q                         | 8        | 12,763                             | 85%                                | 84%                              | <b>90%</b>                         |
| 86 St Q                         | 8        | 17,553                             | 74%                                | 78%                              | <b>86%</b>                         |
| 34 St-Hudson Yards 7            | 5        | 17,442                             | 78%                                | 86%                              | <b>86%</b>                         |
| Eastern Pkwy-Brooklyn Museum 23 | 11       | 3,365                              | 91%                                | 84%                              | <b>86%</b>                         |
| Grand Army Plaza 23             | 11       | 5,399                              | 79%                                | 79%                              | <b>85%</b>                         |
| 86 St BC                        | 6        | 8,617                              | 78%                                | 76%                              | <b>83%</b>                         |

# Lowest Rated Subway Stations

Percentage of satisfied + very satisfied customers for stations with a sample size of 100 or more

| Five Lowest Rated Stations | GSM Zone | May 2023 Average Weekday Ridership | Overall Station Rating Spring 2022 | Overall Station Rating Fall 2022 | Overall Station Rating Spring 2023 |
|----------------------------|----------|------------------------------------|------------------------------------|----------------------------------|------------------------------------|
| 125 St 456                 | 4        | 16,514                             | 31%                                | 35%                              | <b>27%</b>                         |
| 125 St 23                  | 3        | 8,907                              | 29%                                | 34%                              | <b>37%</b>                         |
| 3 Av- 149 St 25            | 3        | 11,994                             | 29%                                | 34%                              | <b>37%</b>                         |
| East Broadway F            | 9        | 11,491                             | 39%                                | 36%                              | <b>39%</b>                         |
| 2 Av F                     | 9        | 12,351                             | 36%                                | 44%                              | <b>39%</b>                         |

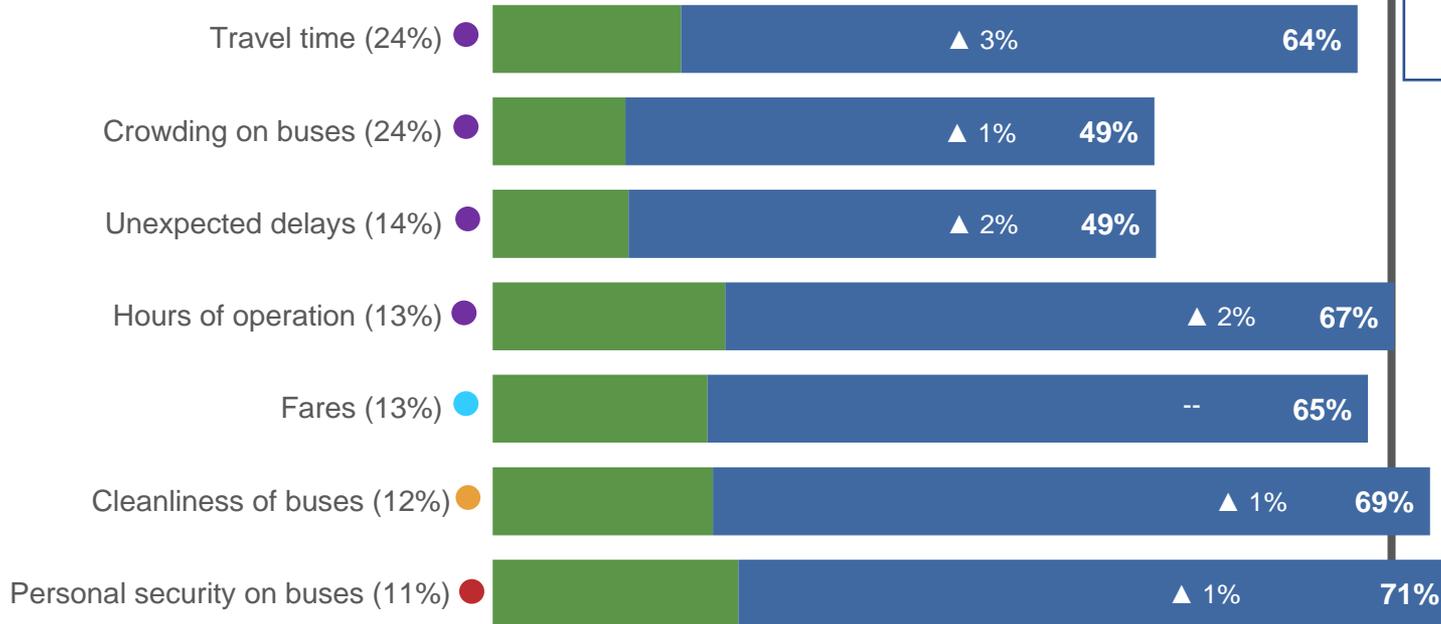
# Key Drivers of Overall Local, Limited and Select Bus Experience

Percentage of satisfied + very satisfied customers (in order of importance)

## Very Important Key Drivers



## Important Key Drivers



◀ Average Attribute Satisfaction

### Attribute Concepts

- Service
- Safety and Security
- Cleanliness
- Fares & Payment

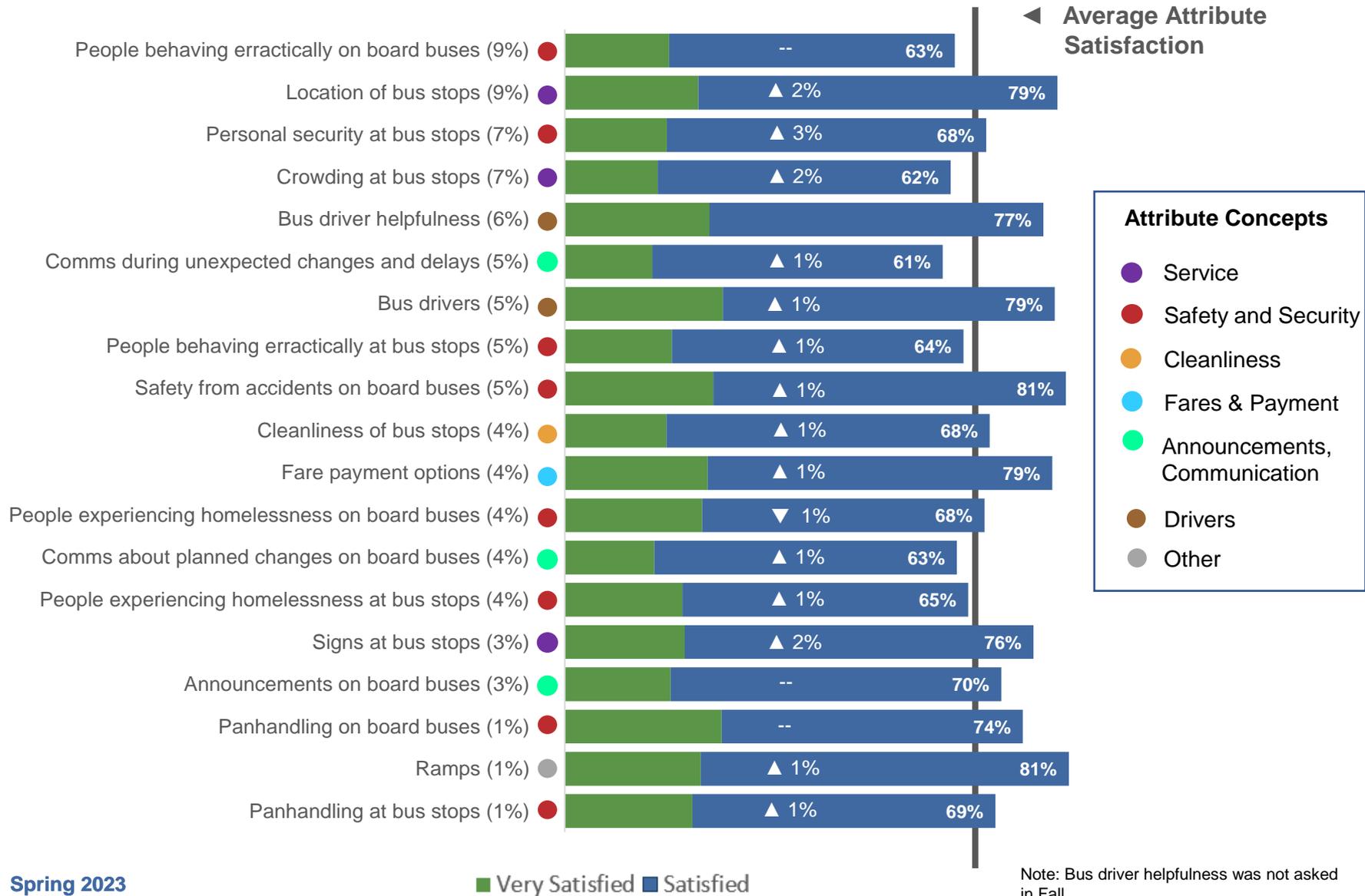
■ Very Satisfied ■ Satisfied

Among Current Customers using at least once per year; Percentage of Total Satisfied (Rated 6-10)

▲/▼ indicate a percentage point increase/decrease since Fall; -- indicates no percentage point change

# Key Drivers of Overall Local Bus (cont.)

Percentage of satisfied + very satisfied customers (in order of importance)



Note: Bus driver helpfulness was not asked in Fall

# Highest Rated Local, Limited and Select Bus Routes

Percentage of satisfied + very satisfied customers for routes with a sample size of 50 or more

| Route   | Depot            | April 2023<br>Average Weekday<br>Ridership | Overall Route<br>Rating<br>Spring 2022 | Overall Route<br>Rating<br>Fall 2022 | Overall Route<br>Rating<br>Spring 2023 |
|---------|------------------|--|--|--------------------------------------|--|
| M79 SBS | Michael J. Quill | 8,173                                      | 90%                                    | 92%                                  | <b>93%</b>                             |
| Q28     | Casey Stengel    | 6,782                                      | 74%                                    | 80%                                  | <b>89%</b>                             |
| Q12     | Casey Stengel    | 6,561                                      | 79%                                    | 84%                                  | <b>89%</b>                             |
| Q70 SBS | LaGuardia        | Fare-Free                                  | 82%                                    | 95%                                  | <b>88%</b>                             |
| M86 SBS | Michael J. Quill | 13,588                                     | 91%                                    | 88%                                  | <b>88%</b>                             |

# Lowest Rated Local, Limited and Select Bus Routes

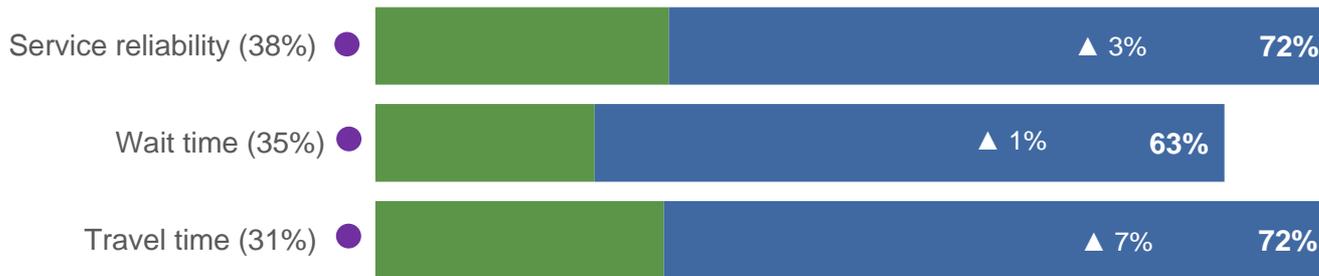
Percentage of satisfied + very satisfied customers for routes with a sample size of 50 or more

| Route | Depot          | April 2023<br>Average Weekday<br>Ridership | Overall Route<br>Rating<br>Spring 2022 | Overall Route<br>Rating<br>Fall 2022 | Overall Route<br>Rating<br>Spring 2023 |
|-------|----------------|--|--|--------------------------------------|--|
| B12   | East New York  | 6,429                                      | 55%                                    | 55%                                  | <b>40%</b>                             |
| Q56   | East New York  | 5,277                                      | 65%                                    | 48%                                  | <b>47%</b>                             |
| Bx21  | West Farms     | 5,648                                      | 48%                                    | 50%                                  | <b>47%</b>                             |
| B48   | Grand Avenue   | 2,144                                      | 57%                                    | 41%                                  | <b>48%</b>                             |
| B37   | Jackie Gleason | 1,747                                      | 55%                                    | 58%                                  | <b>49%</b>                             |

# Key Drivers of Overall Express Bus Experience

Percentage of satisfied + very satisfied customers (in order of importance)

## Very Important Key Drivers

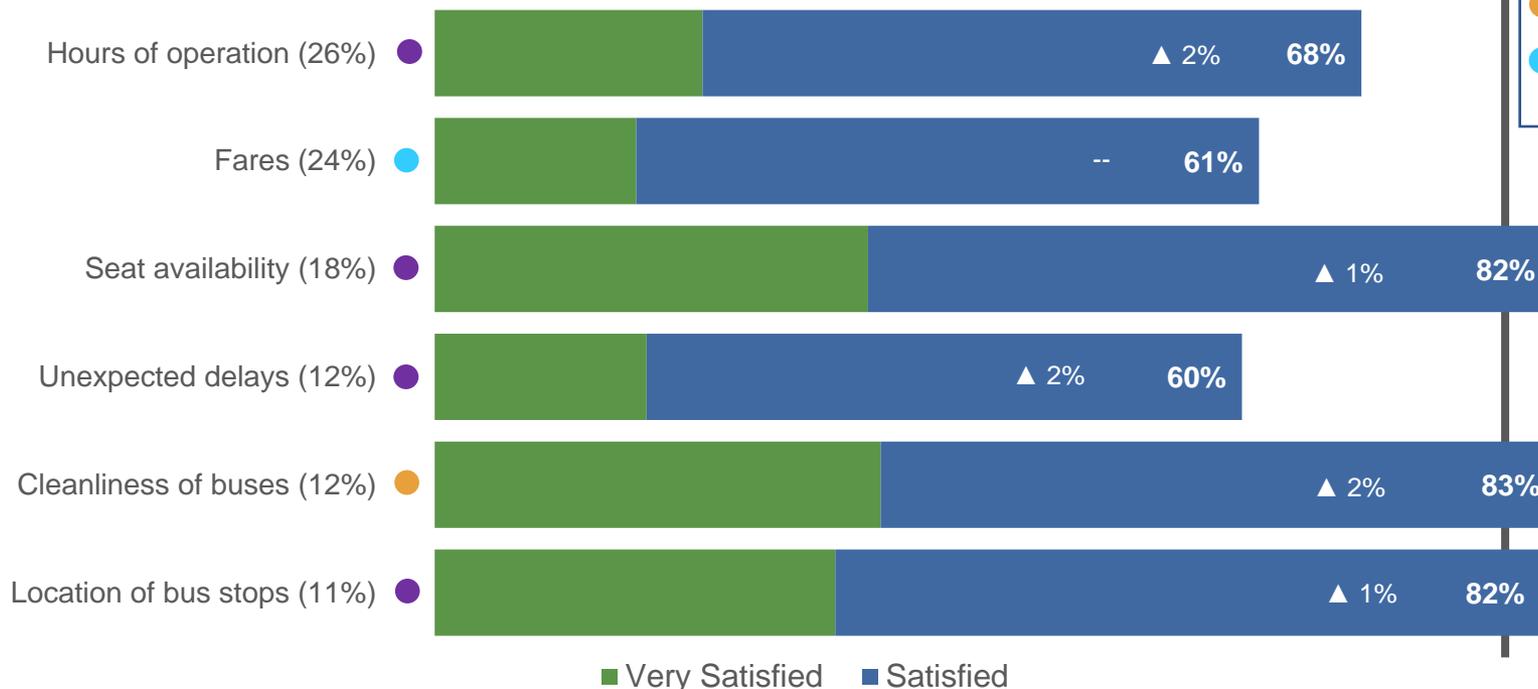


◀ Average Attribute Satisfaction

### Attribute Concepts

- Service
- Safety/Security
- Cleanliness
- Fares & Payment

## Important Key Drivers



■ Very Satisfied ■ Satisfied

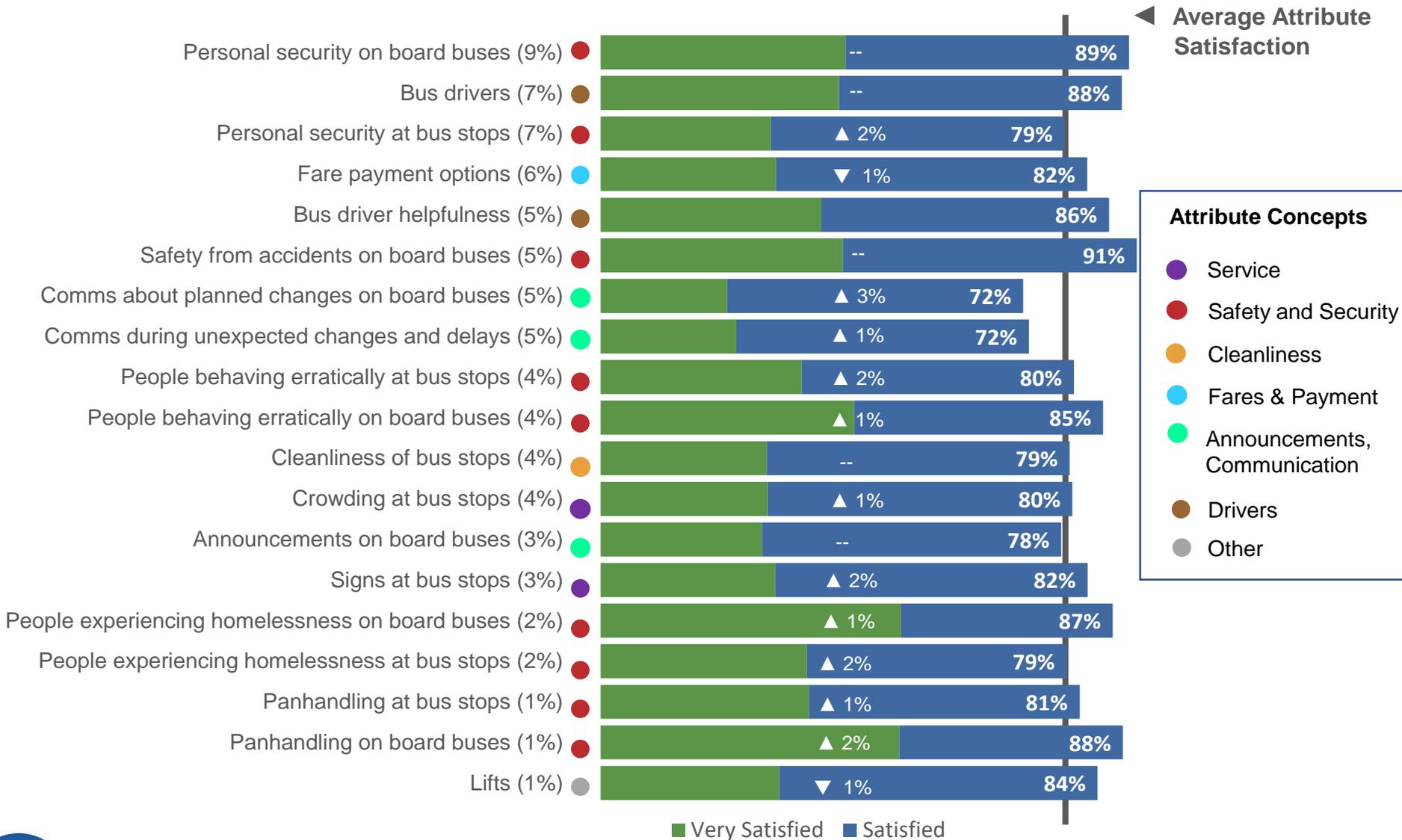
Among Current Customers using at least once per year; Percentage of Total Satisfied (Rated 6-10)

▲/▼ indicate a percentage point increase/decrease since Fall; -- indicates no percentage point change



# Key Drivers of Express Bus Experience (cont.)

Percentage of satisfied + very satisfied customers (in order of importance)



Among Current Customers using at least once per year; Percentage of Total Satisfied (Rated 6-10)  
 ▲/▼ indicate a percentage point increase/decrease since Fall; -- indicates no percentage point change

Note: Bus driver helpfulness was not asked in Fall



# Buses: Encouragement to Use More Often

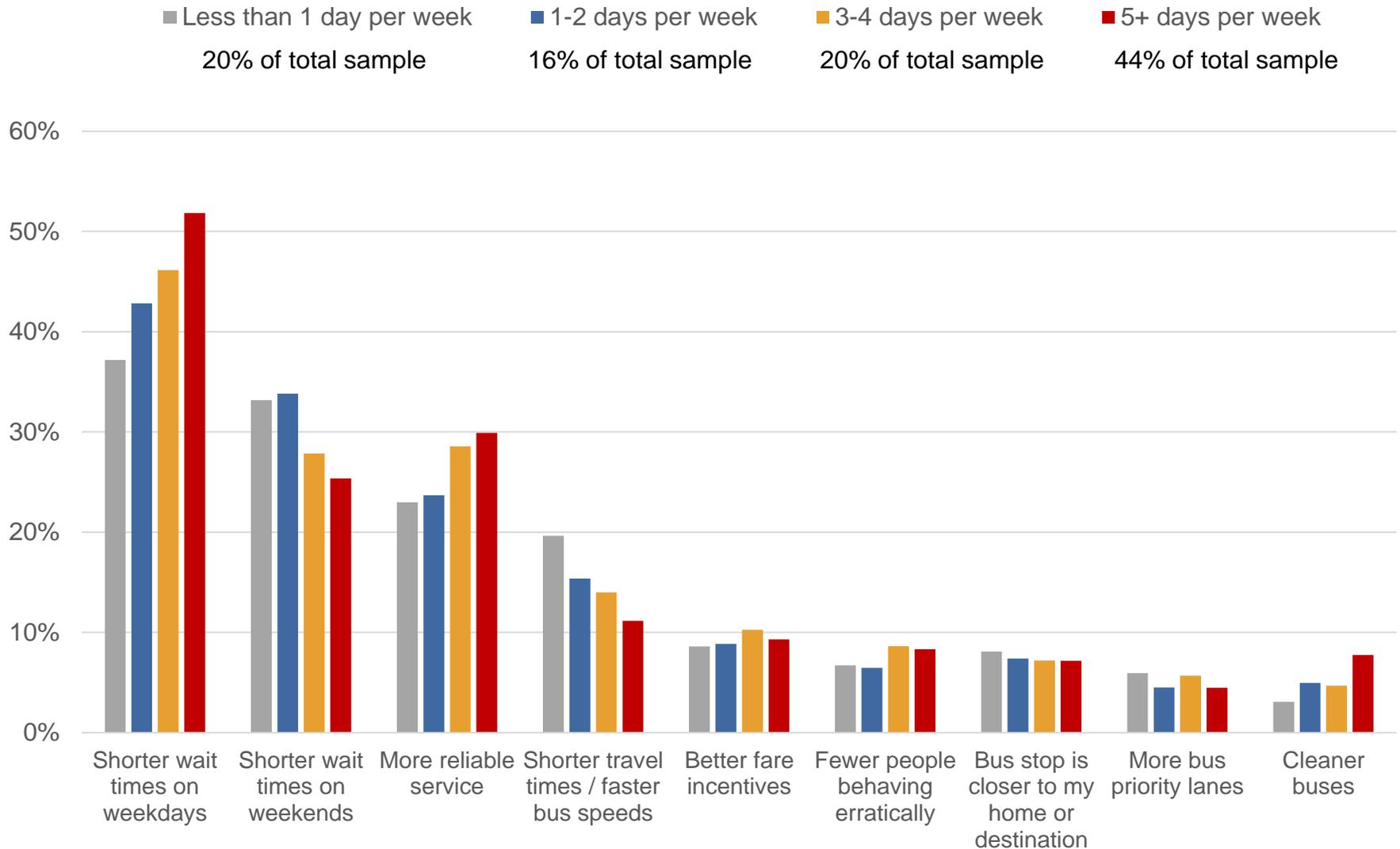
Percentage of responses by bus type

| Local, Limited, SBS Bus                                   |     |
|---|-----|
| Shorter wait times (more frequent service) on weekdays    | 46% |
| Shorter wait times (more frequent service) on weekends    | 29% |
| More reliable service                                     | 27% |
| Shorter travel times / faster bus speeds                  | 14% |
| Better fare incentives                                    | 9%  |
| Fewer people behaving erratically                         | 8%  |
| Bus stop is closer to my home or destination              | 7%  |
| Cleaner buses   | 6%  |
| More bus priority lanes                                   | 5%  |
| More visible police / security presence                   | 5%  |
| More Select Bus Service (SBS) routes                      | 4%  |
| Personal security concerns are addressed                  | 3%  |
| More people wearing masks                                 | 2%  |
| A change in work from home policy from my employer        | 1%  |
| Increased for-hire vehicle cost (taxi, car service, Uber) | 1%  |
| Other   | 7%  |
| None of the above   | 2%  |

| Express Bus   |     |
|---|-----|
| Shorter wait times (more frequent service) on weekdays    | 39% |
| Shorter wait times (more frequent service) on weekends    | 21% |
| Better fare incentives                                    | 21% |
| More reliable service                                     | 20% |
| Shorter travel times / faster bus speeds                  | 19% |
| Bus stop is closer to my home or destination              | 10% |
| More bus priority lanes                                   | 8%  |
| A change in work from home policy from my employer        | 5%  |
| Fewer people behaving erratically                         | 4%  |
| Cleaner buses   | 4%  |
| More visible police/security presence                     | 3%  |
| More Select Bus Service (SBS) routes                      | 3%  |
| Personal security concerns are addressed                  | 2%  |
| More people wearing masks                                 | 2%  |
| Increased for-hire vehicle cost (taxi, car service, Uber) | 0%  |
| Other   | 7%  |
| None of the above   | 2%  |

# Local bus -Subways - 'What would encourage you to use more often?'

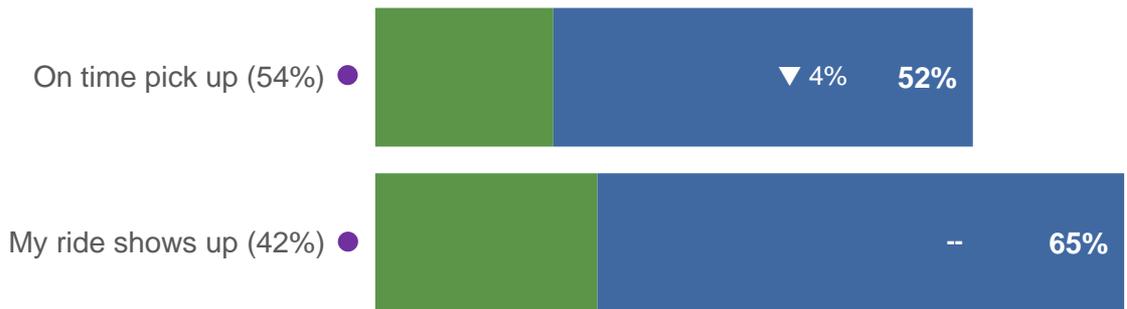
Percentage of responses by bus use frequency



# Key Drivers of Overall Access-A-Ride Experience

Percentage of satisfied + very satisfied customers (in order of importance)

## Very Important Key Drivers



◀ Average Attribute Satisfaction

### Attribute Concepts

- Service
- Safety and Security

## Important Key Drivers



■ Very Satisfied ■ Satisfied

Among Current Customers using at least once per year; Percentage of Total Satisfied (Rated 6-10)

▲/▼ indicate a percentage point increase/decrease since Fall; -- indicates no percentage point change

# Key Drivers of Overall Access-A-Ride Experience (cont.)

Percentage of satisfied + very satisfied customers (in order of importance)

