Customer Satisfaction Survey & COVID Study

Local Bus Survey Results

November 2021

Fall 2021
Customers Count

Customers Count Executive Summary

- A large majority of employed customers work in locations that never closed or have already reopened. 85% of lapsed customers report their workplace has reopened or never closed. 94% of current customers report their workplace has reopened or never closed.

- Before COVID, only 12% to 13% of customers teleworked all or most of the time, regardless of their status as a lapsed or current customer. In Fall 2021, 56% of lapsed customers and 28% of current customers reported teleworking all or most of the time.

- Among lapsed customers, 42% indicated using an alternative mode and 41% indicated working from home as reasons they did not use buses. Among lapsed customers who used alternative modes, 78% indicated concerns about COVID and 66% indicated crowding or social distancing as reasons.

Customers Count Executive Summary

- 36% of current customers used buses more often before COVID. More than one-third of these customers (36%) indicated the reason was that they were working from home. Similarly, 35% indicated they used an alternative mode. Among current customers using alternative modes, 62% indicated concerns about crowding or social distancing, and 61% indicated concerns about COVID as reasons.

- About two-thirds of current customers (67%) indicated they agree or strongly agree that MTA cleaning and disinfecting efforts make them feel safe when using the buses.

- The following were the rated as important or very important factors to influence most lapsed customers to return to buses: buses and bus stops feel safe from crime and harassment (76%), buses are better cleaned and disinfected (75%), social distancing concerns are resolved (74%), COVID vaccination (72%), and cost of a ride (55%).

Research Objectives

Determine — Determine the characteristics of current customers and how they compare to lapsed customers including employment, travel patterns, customer satisfaction, communication channels, & fare payment.

Understand — Understand customer insights on COVID concerns such as safety, health, & factors influencing future usage regarding using transit.

Obtain — Obtain customer knowledge regarding their employers' return to work reopening plans.

Identify — Identify what strategies we can employ to increase ridership and incentivize customers to return.

Research Methodology

- Conducted an online survey of current and lapsed customers that launched on September 20, 2021 and remained open through October 4, 2021.

- Obtained an excellent response rate with 8,797 valid responses, of which 8,359 responses were current, and 438 were lapsed.

- Data was weighted to represent the race, ethnicity and annual household incomes of our customers. Systemwide measures are derived from the weighted average of results by borough-wide ridership.

- The margin of error for the total sample, the lapsed customer sample, and the current customer sample is about 1% at the 95% confidence level.

Employer Plans to Reopen Work Location: Lapsed vs. Current

Employer reopening?	Lapsed	Current
Yes, plans on opening work locations	10%	4%
No, but plans on reopening at another location in NY Metropolitan area	2%	1%
No, but plans on reopening outside NY Metropolitan area	<1%	<1%
No, does not plan on reopening/business closed	2%	1%
My business never closed/is currently opened	85%	94%
Don't know	1%	<1%

Work Location Reopening Date:
Lapsed vs. Current
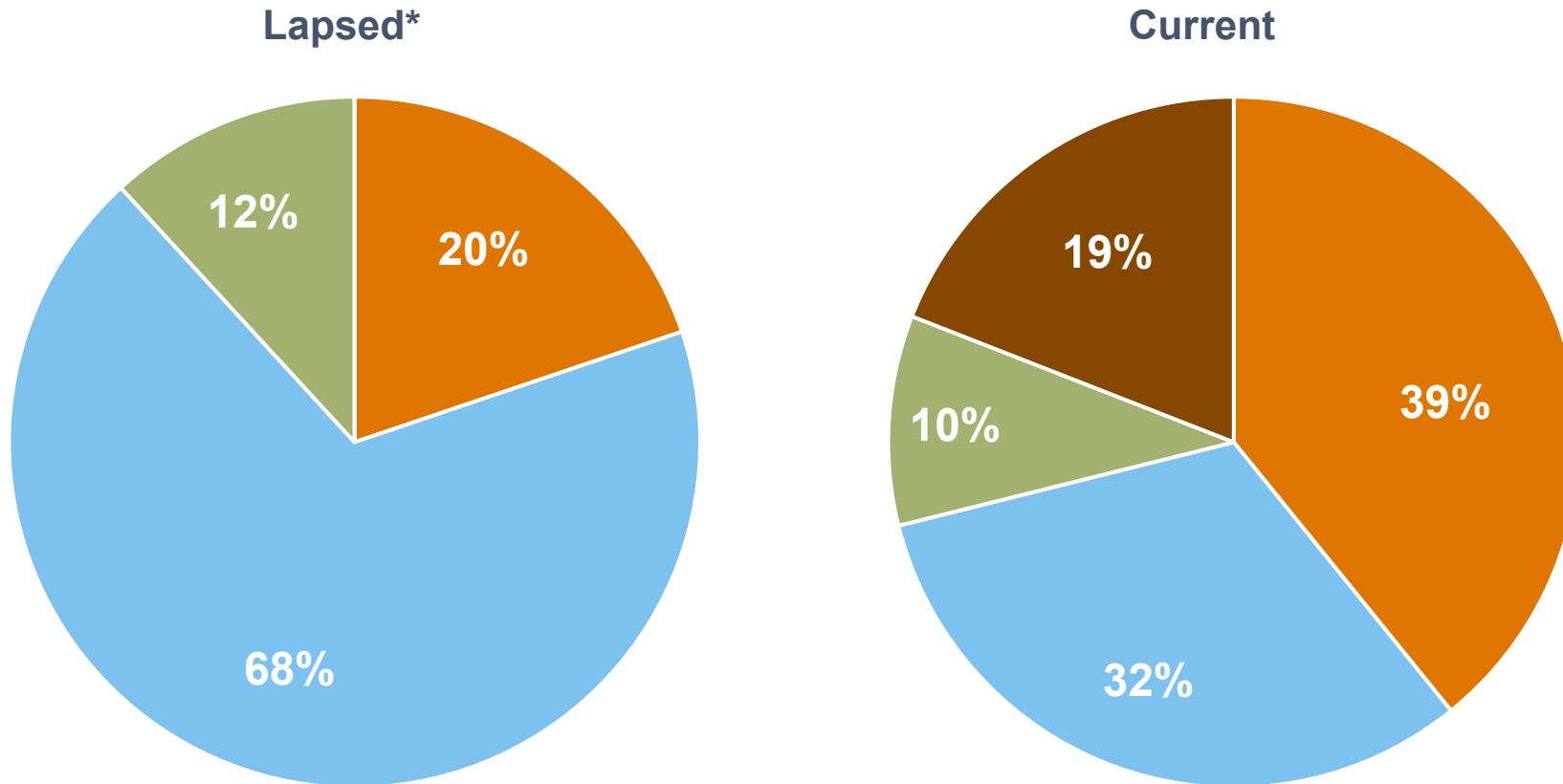
Lapsed*

Current

- Before January 2022
- In January 2022
- After January 2022
- Not sure

*Small sample size

7

Telecommuting Among Customers: Lapsed vs. Current

How often do you work from home?	Pre-COVID		Present	
	Lapsed	Current	Lapsed	Current
All the time	9%	8%	49%	17%
Usually	3%	5%	7%	11%
Sometimes	17%	12%	15%	15%
Rarely	21%	14%	10%	11%
Never	50%	60%	19%	46%

Trip Purpose:
Lapsed vs. Current

Trip Purpose	Lapsed	Current
Work	48%	41%
Medical or mental health clinic, office, or facility	9%	17%
School	12%	13%
Store, retail establishment, shopping center, restaurant, café, bar, or club	6%	7%
Entertainment venue, cultural institution, or library	4%	6%
Home of friend or relative	3%	3%
Park, outdoor space, gym, or recreation facility	4%	2%
Religious institution, community center, or senior center	2%	2%
Other	12%	7%

Time of Day Usage:
Lapsed vs. Current

What time does your trip start?	Lapsed	Current
6:30am to 9:30am	52%	45%
9:30am to 3:30pm	32%	37%
3:30pm to 8:00pm	7%	9%
8:00pm to 12:00am	1%	2%
12:00am to 6:30am	8%	8%

Lapsed Customers: Reasons for Not Using the Bus

Reasons for not using*	Lapsed
Using a different mode	42%
Working from home	41%
Lifestyle change	16%
Change in my health	12%
Retired	10%
Moved to a different residence	10%
Unemployed	8%
Different work location	7%
Change of jobs	5%
Non-work destinations are closed	4%
Furloughed	<1%
Other	17%

*Multiple responses allowed so may add up to more than 100%.

Current Customers:
Reasons for Using the Bus Less

- Riding less than before COVID
- Riding the same as before COVID
- Riding more than before COVID

17%

36%

47%
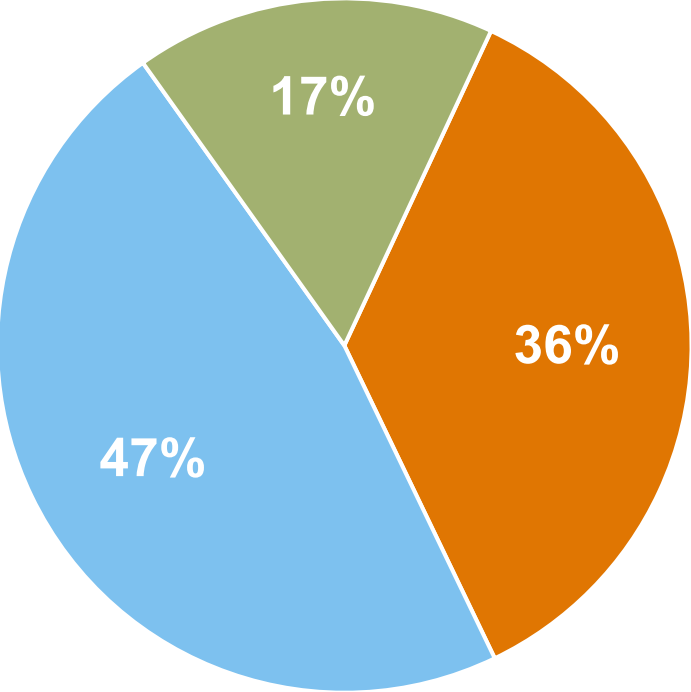
Reasons for riding less*	Current
Working from home	36%
Using a different mode	35%
Lifestyle change	18%
Unemployed	14%
Retired	12%
Non-work destinations are closed	10%
Change in my health	9%
Different work location	6%
Change of jobs	5%
Moved to a different residence	4%
Furloughed	2%
Other	13%

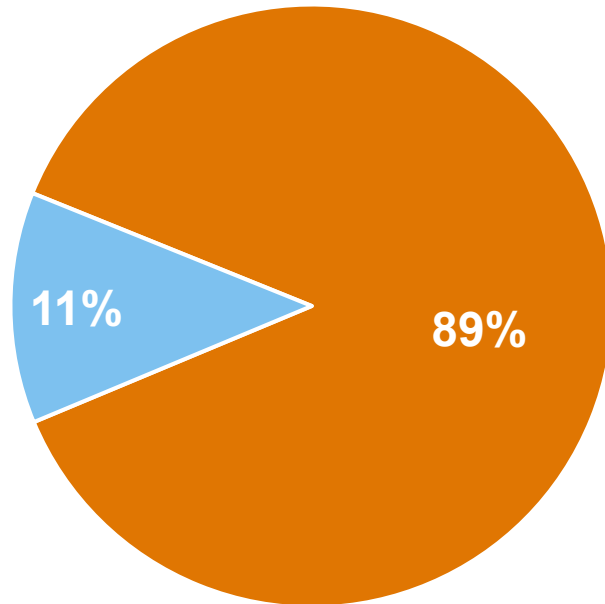*Multiple responses allowed so may add up to more than 100%.

Reasons for Using a Different Mode
Among those Using the Bus Less: Lapsed vs. Current

Reasons for using a different mode?*	Lapsed	Current
The bus is crowded / unable to social distance	66%	62%
Concerns about COVID	78%	61%
The bus takes longer	44%	42%
The bus is not reliable	33%	29%
I do not feel safe from crime and harassment on the bus	43%	22%
The bus is not clean	30%	20%
I do not feel safe from crime and harassment at bus stops	30%	17%
The bus is more expensive	11%	12%

*Multiple responses allowed so may add up to more than 100%.

Alternative Modes Used for Trips Made by Bus before COVID: Current and Lapsed

■ Have used alternative modes(s)

■ Have not used alternative modes(s)

11%

89%

Which mode(s) have you been using?*	Current and Lapsed
Walk	63%
Subway	48%
For hire vehicle	32%
Driver of owned personal vehicle	15%
Passenger in a personal vehicle	13%
Express bus	9%
Bicycle or scooter	8%
Long Island Rail Road	6%
Access-A-Ride Paratransit	5%
Metro-North Railroad	5%
Ferry	5%
Driver of rented/borrowed personal vehicle	3%
Other bus or jitney	2%
Staten Island Railway	1%
Other train or light-rail	1%
Tramway	<1%
Other	2%

*Multiple responses allowed so may add up to more than 100%.

Fare Payment Before and After COVID:
Lapsed vs. Current

Product	Lapsed Pre-COVID	Current Pre-COVID	Current Present
Pay-Per-Ride MetroCard	37%	34%	31%
7-Day Unlimited MetroCard	4%	8%	7%
30-Day Unlimited MetroCard	17%	18%	13%
7-Day Unlimited Express Bus Plus	<1%	1%	<1%
EasyPayXpress Pay-Per-Ride MetroCard	7%	3%	3%
EasyPayXpress 30-Day Unlimited MetroCard	1%	1%	1%
OMNY Pay-Per-Ride	3%	2%	13%
Pay-Per-Ride Reduced-Fare MetroCard	7%	9%	9%
7-Day Unlimited Reduced-Fare MetroCard	1%	1%	1%
30-Day Unlimited Reduced-Fare MetroCard	1%	2%	2%
EasyPay Reduced-Fare MetroCard	7%	8%	8%
Access-A-Ride MetroCard	4%	3%	3%
Student MetroCard or pass	2%	3%	3%
Employee pass	1%	1%	1%
Uniticket	<1%	<1%	<1%
Coins	4%	2%	2%
Other	4%	4%	4%

Local, Limited, and SBS Bus Customer Key Drivers

High

Importance

Top Five Most Important Attributes: Performance Needs Improvement to Meet Customer Expectations
(lower satisfaction)

Top Five Most Important Attributes: Performance Meets or Exceeds Customer Expectations
(higher satisfaction)

1. Waiting times
2. Crowding on buses
3. Mask wearing on buses
4. Unexpected delays
5. Cost of a ride

1. Travel times
2. Cleanliness of buses
3. Hours of operation
4. Crime and harassment on buses
5. Bus drivers

Low

Low   **Performance**   **High**

Current Customers: Service and Travel Information Sources

Which service and travel information sources do you use?*	Percent
MTA website	56%
MYmta app	48%
Other (non-MTA) app	21%
My MTA Alerts	12%
MTA social media (Twitter, Facebook, WhatsApp, etc.)	12%
TV, radio, newspaper, or news website	11%
Friends and family	11%
Notify NYC	9%
Other (non-MTA) social media	7%
511	3%

Current Customers: Opinions on Mask Wearing and Cleaning/Disinfecting Efforts

To what extent do you agree with each of the following statements?	Agree or Strongly Agree
I feel safer when I see other customers wearing masks	87%
I wear a mask to protect myself	90%
I wear a mask to protect others	89%
I wear a mask to abide by the law	86%
MTA cleaning and disinfecting efforts make me feel safe	67%

Factors Influencing Future Usage:
Lapsed vs Current

Factors in decision to increase usage in the future:	Lapsed Important or Very Important	Current Important Or Very Important
Buses and bus stops feel safe from crime and harassment	76%	73%
Buses are better cleaned and disinfected	75%	72%
Social distancing concerns are resolved	74%	69%
COVID vaccination	72%	65%
Cost of a ride	55%	61%
Non-work destinations reopen	35%	50%
Restrictions on travel are lifted	44%	47%
Workplace reopens	33%	46%
Entertainment venues reopen	31%	46%
Working from home is no longer permitted	35%	35%
Childs school reopens	16%	30%
Your school or college reopens	17%	30%

MTA

Concerns About the Future:
Lapsed vs Current

Concern:	Lapsed Concerned or Very Concerned	Current Concerned or Very Concerned
Health safety	92%	80%
Social distancing	91%	77%
Cleanliness	91%	76%
Mask wearing	86%	69%
Crime and harassment	84%	67%

Key Take-aways

- A large majority of employed customers work in locations that never closed or have already reopened. 85% of lapsed customers report their workplace has reopened or never closed. 94% of current customers report their workplace has reopened or never closed.

- Among current customers with closed workplaces that intend to reopen, 39% indicated their workplace will reopen before January 2022, 32% indicated it will reopen in January 2022, 10% indicated it will reopen after January 2022, and 19% don't know.

- Before COVID, only 12% to 13% of customers teleworked all or most of the time, regardless of their status as a lapsed or current customer. In Fall 2021, 56% of lapsed customers and 28% of current customers reported teleworking all or most of the time.

Key Take-aways

- When considering their most frequent trip, 48% of lapsed customers reported work as their primary trip purpose. Among current customers, 41% indicated work as their primary trip purpose. Though current customers indicated work as their trip purpose at a lower rate than lapsed customers, they report using the bus for trips to medical or mental health facilities at a greater rate (17%) than lapsed customers (9%).

- Slightly more than half of lapsed customers (52%) rode during the morning rush hour (6:30am to 9:30am), and slightly less than one-third (32%) rode during middays (9:30am to 3:30pm) before COVID. Among current customers, 45% ride during the morning rush hour and 37% ride during middays.

- Among lapsed customers, 42% indicated using an alternative mode and 41% indicated working from home as reasons they did not use buses. Among lapsed customers who used alternative modes, 78% indicated concerns about COVID and 66% indicated crowding or social distancing as reasons.

Key Take-aways

- 36% of current customers used buses more often before COVID. More than one-third of these customers (36%) indicated the reason was that they were working from home. Similarly, 35% indicated they used an alternative mode. Among current customers using alternative modes, 62% indicated concerns about crowding or social distancing, and 61% indicated concerns about COVID as reasons.

- Among both lapsed and current customers who used alternative modes, about two-thirds (63%) indicated they walked for part or all of at least one trip they made by bus before COVID. Other than walking, the most used alternative modes for pre-COVID bus trips are subway (48%) and for hire vehicles (32%).

- Current customers used OMNY more (13%) than they did before COVID, when only 2% used it.

Key Take-aways

- The top three service and travel information sources among current bus customers are MTA website (56%), MYmta app (48%), and other (non-MTA) apps (21%). MTA social media is used by 12%.

- About two-thirds of current customers (67%) indicated they agree or strongly agree that MTA cleaning and disinfecting efforts make them feel safe when using buses.

- The following were the rated as important or very important factors to influence most lapsed customers to return to the buses: buses and bus stops feel safe from crime and harassment (76%), buses are better cleaned and disinfected (75%), social distancing concerns are resolved (74%), COVID vaccination (72%), and cost of a ride (55%).

- The following were the rated as important or very important factors that will influence most current bus customers to use the bus more often: buses and bus stops feel safe from crime and harassment (73%), buses are better cleaned and disinfected (72%), social distancing concerns are resolved (49%), COVID vaccination (65%), cost of a ride (61%), and non-work destinations reopen (50%).

Key Take-aways

- Considering the future, cleanliness, health safety and social distancing are at about the same level of concerning/very concerning to lapsed customers (91% to 92%). Health safety is the most concerning/very concerning to current customers (80%). Concerning/very concerning rates are greater for lapsed customers (84% to 92%), than they are for current customers (67% to 80%).