

Customer  
Satisfaction  
Survey &  
COVID Study

Express 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. 82% of lapsed customers report their workplace has reopened or never closed. 93% of current customers report their workplace has reopened or never closed.
- Before COVID, only 10% to 11% of customers teleworked all or most of the time, regardless of their status as a lapsed or current customer. In Fall 2021, 78% of lapsed customers and 32% of current customers reported teleworking all or most of the time.
- Among lapsed customers, 59% indicated working from home and 17% indicated using an alternative mode as reasons they did not use buses. Among lapsed customers who used alternative modes, 88% indicated concerns about COVID and 53% indicated crowding or social distancing as reasons.

# Customers Count Executive Summary

- 44% of current customers used buses more often before COVID. Slightly less than two-thirds of these customers (63%) indicated they were working from home, and 15% indicated they used an alternative mode as reasons. Among current customers using alternative modes, 58% indicated concerns about COVID, 41% indicated the bus takes longer, and 34% indicated concerns about crowding or social distancing as reasons.
- More than two-thirds of current customers (69%) 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 are better cleaned and disinfected (78%), buses and bus stops feel safe from crime and harassment (77%), social distancing concerns are resolved (71%), COVID vaccination (70%), and cost of a ride (58%).

# 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.

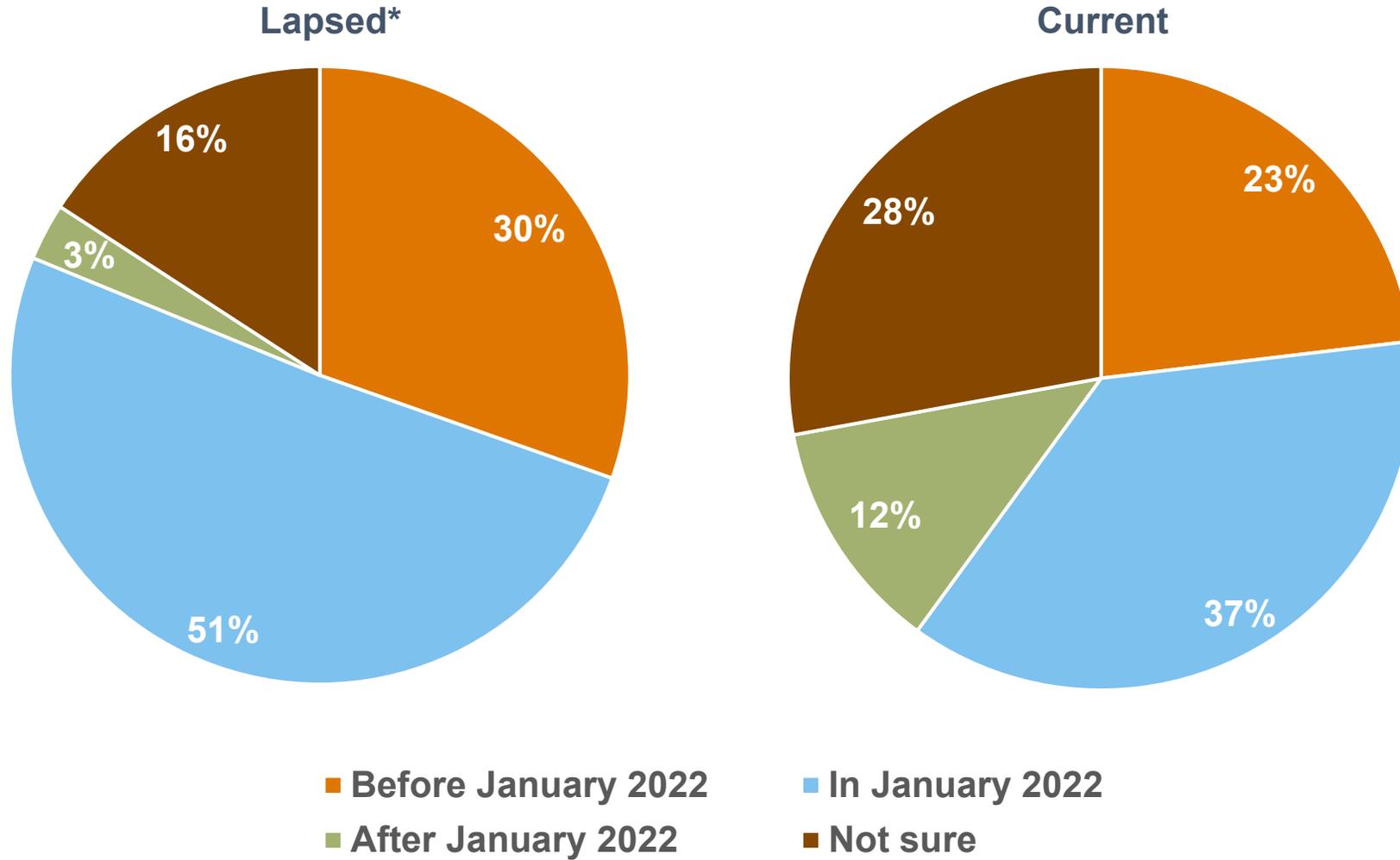
# Research Methodology

- 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 3,301 valid responses, of which 2,906 responses were current, and 395 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 2% at the 95% confidence level.

## Employer Plans to Reopen Work Location: Lapsed vs. Current

Employer Reopening?	Lapsed %	Current %
Yes, plans on opening work locations	12%	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%	0%
No, does not plan on reopening/business closed	1%	2%
My business never closed/is currently opened	82%	93%
Don't know	1%	1%

# Work Location Reopening Date: Lapsed vs. Current



\*Small sample size

# Telecommuting Among Customers: Lapsed vs. Current

How often do you work from home?	Pre-COVID		Present	
	Lapsed	Current	Lapsed	Current
All the time	6%	8%	69%	17%
Usually	4%	3%	9%	15%
Sometimes	22%	14%	8%	20%
Rarely	19%	18%	7%	12%
Never	50%	57%	7%	36%

## Trip Purpose: Lapsed vs. Current

Trip Purpose	Lapsed	Current
Work	67%	60%
Medical or mental health clinic, office, or facility	10%	10%
Store, retail establishment, shopping center, restaurant, café, bar, or club	2%	9%
School	3%	6%
Other	5%	5%
Home of friend or relative	3%	5%
Entertainment venue, cultural institution, or library	9%	3%
Park, outdoor space, gym, or recreation facility	1%	2%
Religious institution, community center, or senior center	<1%	<1%

## Time of Day Usage: Lapsed vs. Current

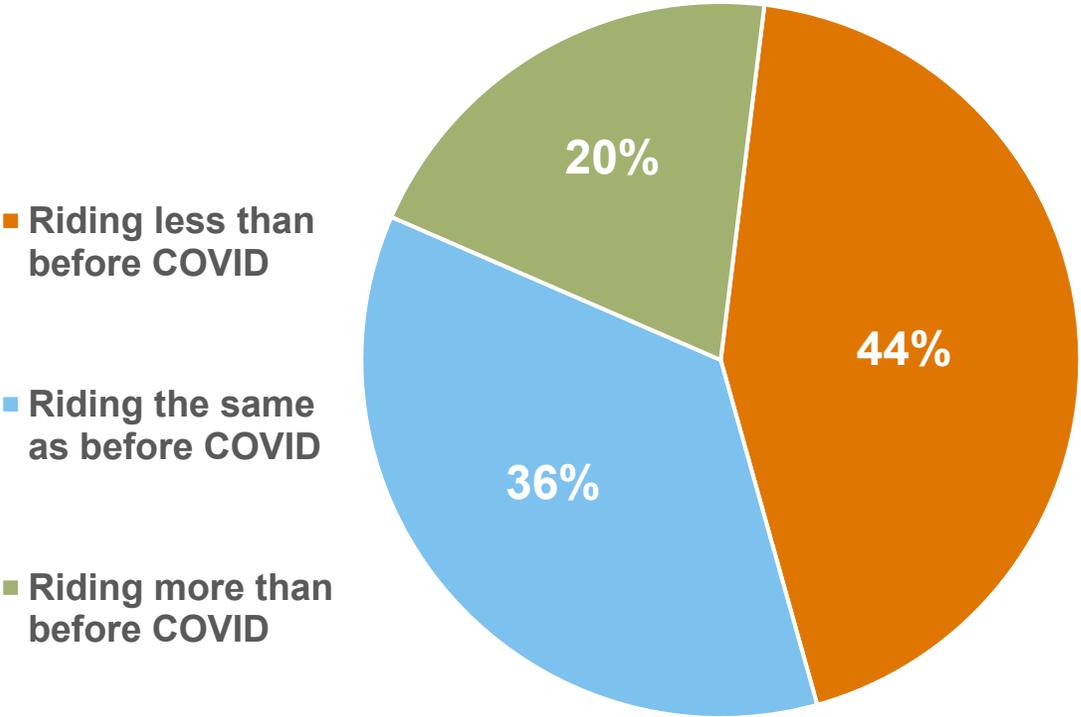
What time does your trip start?	Lapsed	Current
6:30am to 9:30am	60%	60%
9:30am to 3:30pm	17%	20%
3:30pm to 8:00pm	3%	5%
8:00pm to 12:00am	2%	1%
12:00am to 6:30am	18%	14%

## Lapsed Customers: Reasons for Not Using the Bus

Reasons for not using*	Lapsed
Working from home	59%
Using a different mode	17%
Retired	15%
Change in my health	10%
Lifestyle change	8%
Different work location	6%
Moved to a different residence	6%
Non-work destinations are closed	6%
Unemployed	5%
Change of jobs	5%
Furloughed	1%
Other	8%

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

# Current Customers: Reasons for Using the Bus Less



Reasons for riding less*	Current
Working from home	63%
Using a different mode	15%
Lifestyle change	10%
Unemployed	9%
Non-work destinations are closed	8%
Retired	7%
Different work location	7%
Change of jobs	4%
Change in my health	4%
Moved to a different residence	4%
Furloughed	2%
Other	11%

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

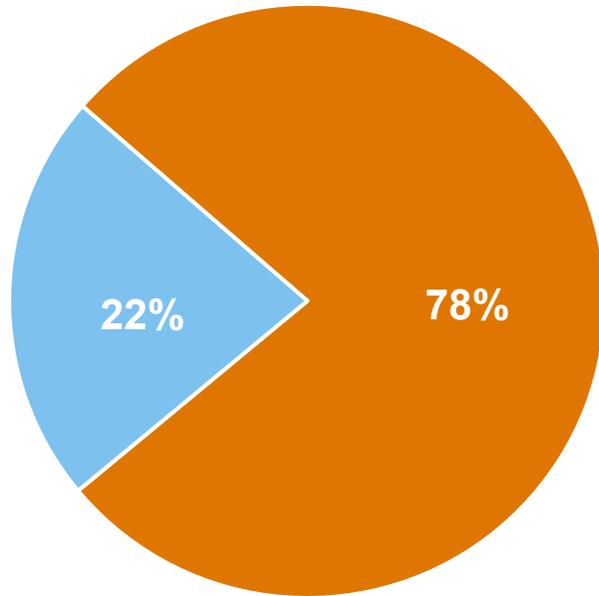
## Reasons for Using a Different Mode Among those Using the Bus Less: Lapsed vs. Current

Reasons for using a different mode?*	Lapsed	Current
Concerns about COVID	88%	58%
The bus takes longer	25%	41%
The bus is crowded / unable to social distance	53%	34%
The bus is more expensive	6%	24%
The bus is not reliable	29%	21%
The bus is not clean	28%	18%
I do not feel safe from crime and harassment at bus stops	24%	13%
I do not feel safe from crime and harassment on the bus	27%	11%

\*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)



Which mode(s) have you been using?*	Current and Lapsed
Subway	54%
Walk	32%
Local bus	30%
Driver of owned personal vehicle	29%
For hire vehicle	23%
Passenger in a personal vehicle	13%
Ferry	12%
Long Island Rail Road	11%
Metro-North Railroad	8%
Driver of rented/borrowed personal vehicle	5%
Staten Island Railway	4%
Bicycle or scooter	4%
Access-A-Ride Paratransit	4%
Other	3%
Other bus or jitney	3%
Other train or light-rail	1%
Tramway	<1%

\*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	34%	46%	38%
7-Day Unlimited Express Bus Plus	18%	16%	13%
EasyPayXpress Pay-Per-Ride MetroCard	22%	13%	12%
OMNY Pay-Per-Ride	3%	5%	18%
Pay-Per-Ride Reduced-Fare MetroCard	9%	5%	5%
EasyPay Reduced-Fare MetroCard	6%	5%	5%
Access-A-Ride MetroCard	1%	1%	1%
Student MetroCard or pass	2%	3%	3%
Employee pass	1%	1%	1%
Other	4%	4%	4%

# Express Bus Customer Key Drivers



# Current Customers: Service and Travel Information Sources

Which service and travel information sources do you use?*	Percent
MTA website	62%
MYmta app	47%
Other (non-MTA) app	18%
My MTA Alerts	16%
MTA social media (Twitter, Facebook, WhatsApp, etc.)	16%
Friends and family	9%
Notify NYC	8%
TV, radio, newspaper, or news website	8%
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	85%
I wear a mask to protect myself	89%
I wear a mask to protect others	87%
I wear a mask to abide by the law	87%
MTA cleaning and disinfecting efforts make me feel safe	69%

## 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	77%	75%
Buses are better cleaned and disinfected	78%	75%
Social distancing concerns are resolved	71%	69%
Cost of a ride	58%	67%
COVID vaccination	70%	65%
Workplace reopens	39%	56%
Restrictions on travel are lifted	47%	52%
Non-work destinations reopen	34%	51%
Entertainment venues reopen	30%	48%
Working from home is no longer permitted	47%	48%
Your school or college reopens	11%	32%
Child's school reopens	14%	31%

# Concerns About the Future: Lapsed vs Current

Concern:	Lapsed Concerned or Very Concerned	Current Concerned or Very Concerned
Mask wearing	90%	74%
Health safety	92%	73%
Social distancing	88%	71%
Cleanliness	90%	64%
Crime and harassment	80%	59%

## Key Take-aways

- A large majority of employed customers work in locations that never closed or have already reopened. 82% of lapsed customers report their workplace has reopened or never closed. 93% of current customers report their workplace has reopened or never closed.
- Among current customers with closed workplaces that intend to reopen, 23% indicated their workplace will reopen before January 2022, 37% indicated it will reopen in January 2022, 12% indicated it will reopen after January 2022, and 28% don't know.
- Before COVID, only 10% to 11% of customers teleworked all or most of the time, regardless of their status as a lapsed or current customer. In Fall 2021, 78% of lapsed customers and 32% of current customers reported teleworking all or most of the time.

## Key Take-aways

- When considering their most frequent trip, 67% of lapsed customers reported work as their primary trip purpose. Among current customers, 60% 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 stores, retail establishments, shopping centers, restaurants, cafés, bars, and clubs at a greater rate (9%) than lapsed customers (2%).
- Six out of ten lapsed customers (60%) rode during the morning rush hour (6:30am to 9:30am), and 17% rode during middays (9:30am to 3:30pm) before COVID. Among current customers, 60% ride during the morning rush hour and 20% ride during middays.
- Among lapsed customers, 59% indicated working from home and 17% indicated using an alternative mode as reasons they did not use buses. Among lapsed customers who used alternative modes, 88% indicated concerns about COVID and 53% indicated crowding or social distancing as reasons.

## Key Take-aways

- Among lapsed customers, 59% indicated working from home and 17% indicated using an alternative mode as reasons they did not use buses. Among lapsed customers who used alternative modes, 88% indicated concerns about COVID and 53% indicated crowding or social distancing as reasons.
- 44% of current customers used buses more often before COVID. Slightly less than two-thirds of these customers (63%) indicated they were working from home, and 15% indicated they used an alternative mode as reasons. Among current customers using alternative modes, 58% indicated concerns about COVID, 41% indicated the bus takes longer, and 34% indicated concerns about crowding or social distancing as reasons.
- Among both lapsed and current customers who used alternative modes for trips they made by express bus before COVID, the most used alternative modes were subway (54%), walk (32%), local bus (30%), personal vehicle as driver (29%), and for hire vehicle (23%).

# Key Take-aways

- Current customers used Pay-Per-Ride MetroCards at a rate of 46% before COVID but reported using them at a lower rate of 38% in Fall 2021. Current customers used OMNY more in Fall 2021 (18%) than they did before COVID, when only 5% used it.
- The top three service and travel information sources among current bus customers are MTA website (62%), MYmta app (47%), and other (non-MTA) apps (18%). MTA social media is used by 16% of customers.
- More than two-thirds of current customers (69%) indicated they agree or strongly agree that MTA cleaning and disinfecting efforts make them feel safe when using the buses.