



Fall 2024 Customers Count Survey

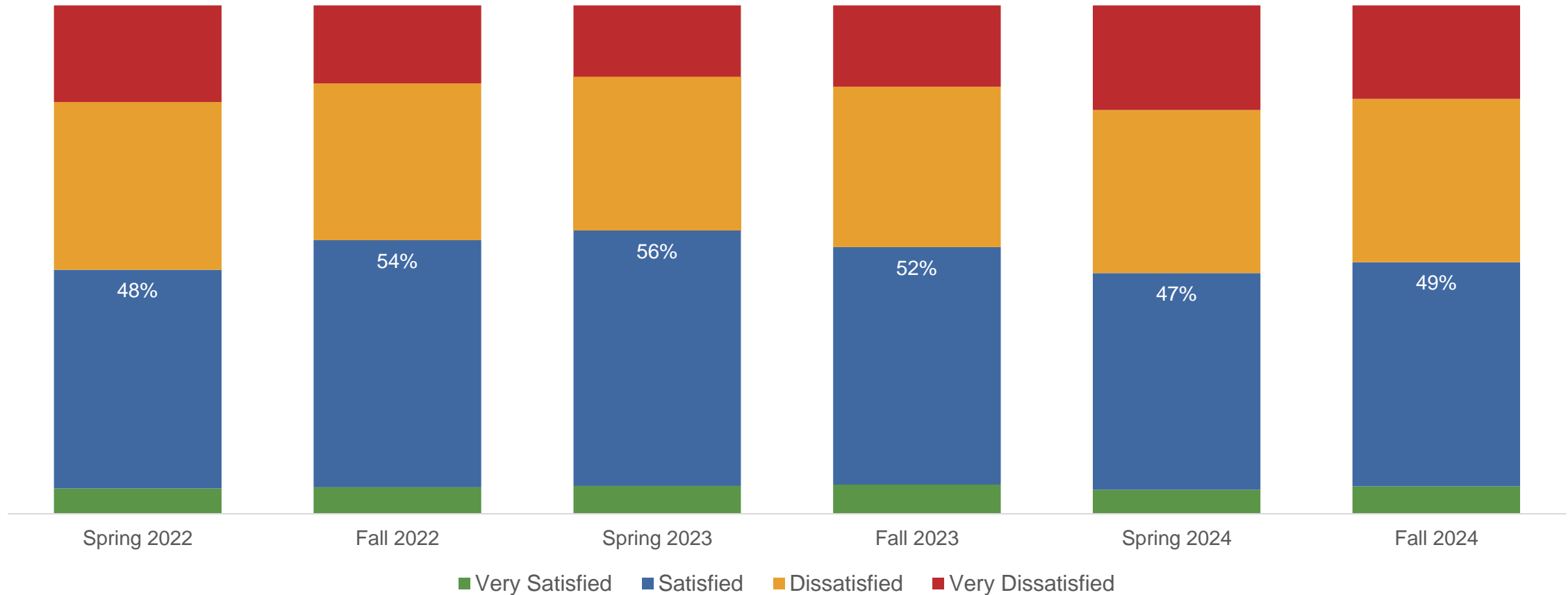
Subway Bus Access-A-Ride

NYCT: Executive Summary

- The Fall 2024 bi-annual Customer Satisfaction survey was conducted Oct 14 – Oct 31, 2024, and was offered online in 9 languages and on the phone
 - We received more than 79,000 subway line, 24,000 bus route and 3,500 AAR evaluations from over 40,000 NYCT customers. Our sample is weighted by ridership, and relevant respondent demographics using ACS 1-Year 2022 Estimates.
- **Nearly half (49%) of subway customers are satisfied with the subway overall, up from 47% in the Spring 24.** However, it remains slightly lower than Fall 2023 (52%).
 - Customers who board in Manhattan, Queens, and Brooklyn are more likely to be satisfied, with customers who typically board in Manhattan up above 50% satisfied customers.
- The overall increase in satisfaction is likely driven by gains in safety perceptions since Spring 2024:
 - 56% of customers feel safe on trains, up from 45% in the spring, and 51% of customers feel safe in stations, up from 44%.
 - Other primary service attributes are largely flat vs. Spring 24: Service reliability (54%), Frequency of delays (45%), and Waiting times (42%)
 - Customers are also more likely to be satisfied on board trains, up 4 pts 58%.
- To further improve Subway satisfaction levels, customers continue to most commonly suggest addressing service reliability, experiencing fewer people behaving erratically in the system, and reducing quality-of-life incidents in the subways.
- **Overall Local, Limited and Select Bus customer satisfaction is 53%, down from 57% in Spring 2024.** Overall Express bus customer satisfaction increased 2 points to 69%.
 - Borough level satisfaction decreased in Brooklyn (down 6 pts), Queens (down 4), and Staten Island (down 7), but stayed flat in the Bronx. Manhattan customers, while most satisfied at 65%, decreased 4 points.
 - Satisfaction dropped four points in each *Service Reliability* and *Wait Times*, which are the two most important attributes to customers.
 - Customer satisfaction with their bus route remains higher than their overall bus satisfaction – 64% are satisfied with their route, down 3 points from the Spring.
 - Customers in Brooklyn are most likely to mention *Wait Times* and *More Reliable Service* as what needs to improve to increase their satisfaction. Bronx customers focus more on *Crowding*, *Fare Evasion*, and *Cleanliness*.
- **Access-A-Ride customer satisfaction is 67%, on par with Spring 2024, 3 points higher than Spring 2023 and 6 points higher than Spring 2022.**
 - Satisfaction with *On Time Pick Up*, the most important attribute to AAR customers, stayed flat at 64%.
 - *Travel Times*, the second most important attribute to customers, decreased 3 points to 71% satisfied.Service reliability and Flexibility (ability to modify a trip same day) are what AAR customers want improved most to increase their satisfaction.

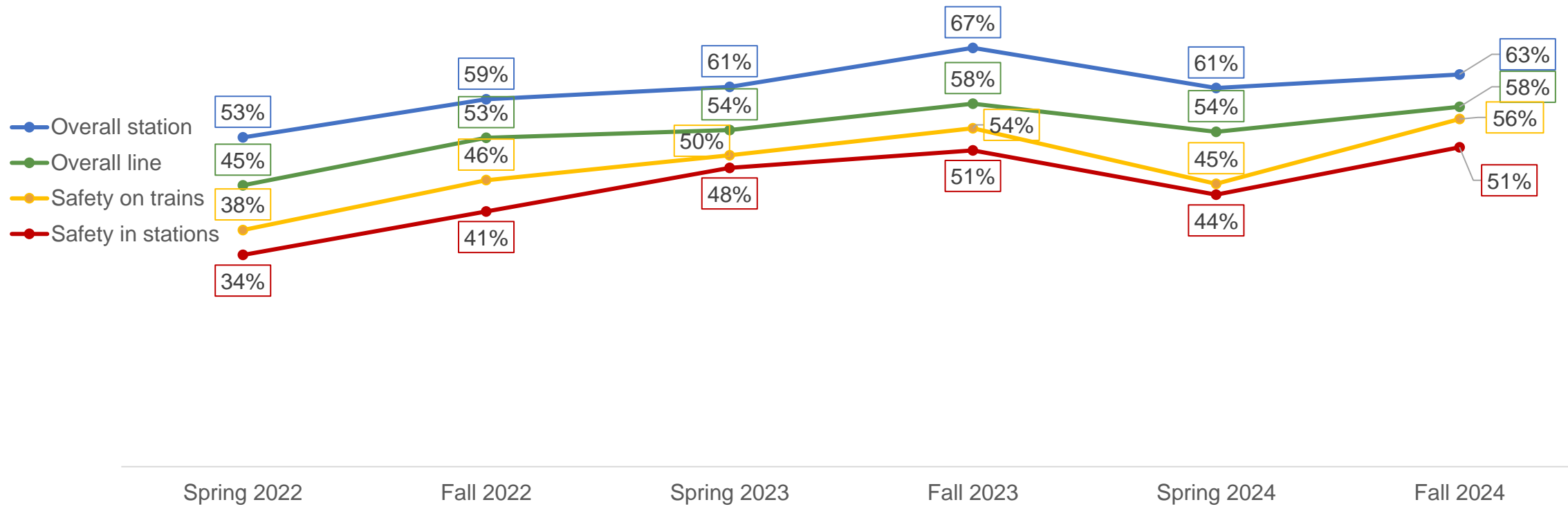


Subway: Overall Satisfaction



Question(s): In general, how satisfied are you with the Subway (including the Staten Island Railway)?
Base: Customers who used the subway at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10)

Subway: Overall KPI Satisfaction Rates

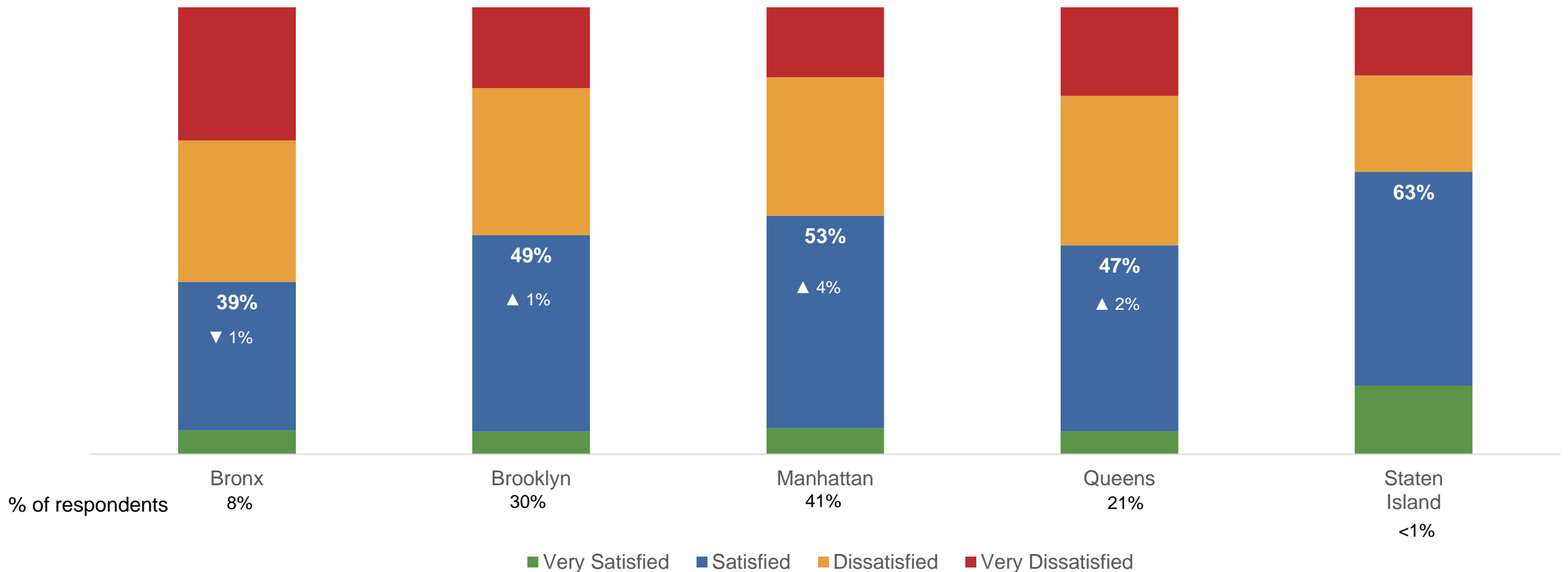


Question(s): How safe do you feel?
 How satisfied are you with the train line? Overall
 How satisfied are you with the station? Overall
 Base: Customers who used the subway at least once in the last 6 months
 Percentage shown is feeling safe/ total satisfied (rated 6-10)



Subway: Overall Satisfaction by Boarding Borough

Customers who board in Manhattan, Queens, and Brooklyn are more likely to be satisfied, with those who typically board in Manhattan up to above 50% satisfied customers.



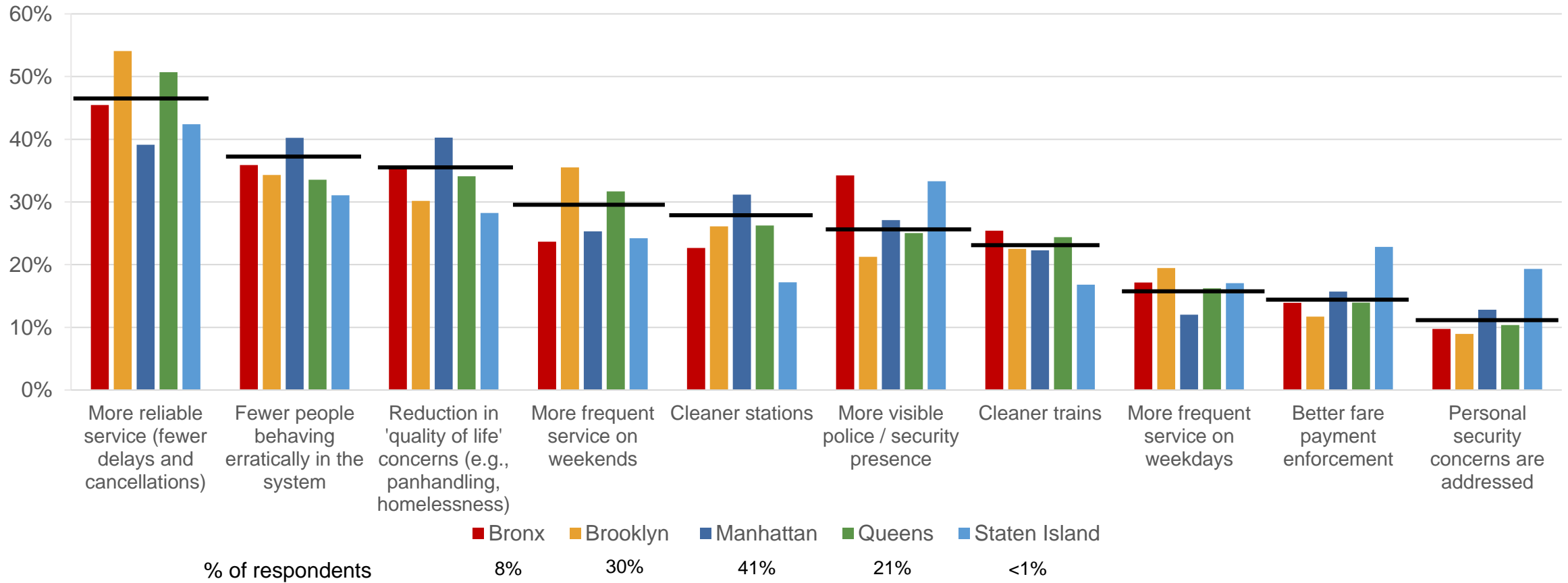
Question(s): In general, how satisfied are you with the Subway (including the Staten Island Railway)?

Base: Customers who used 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 2024

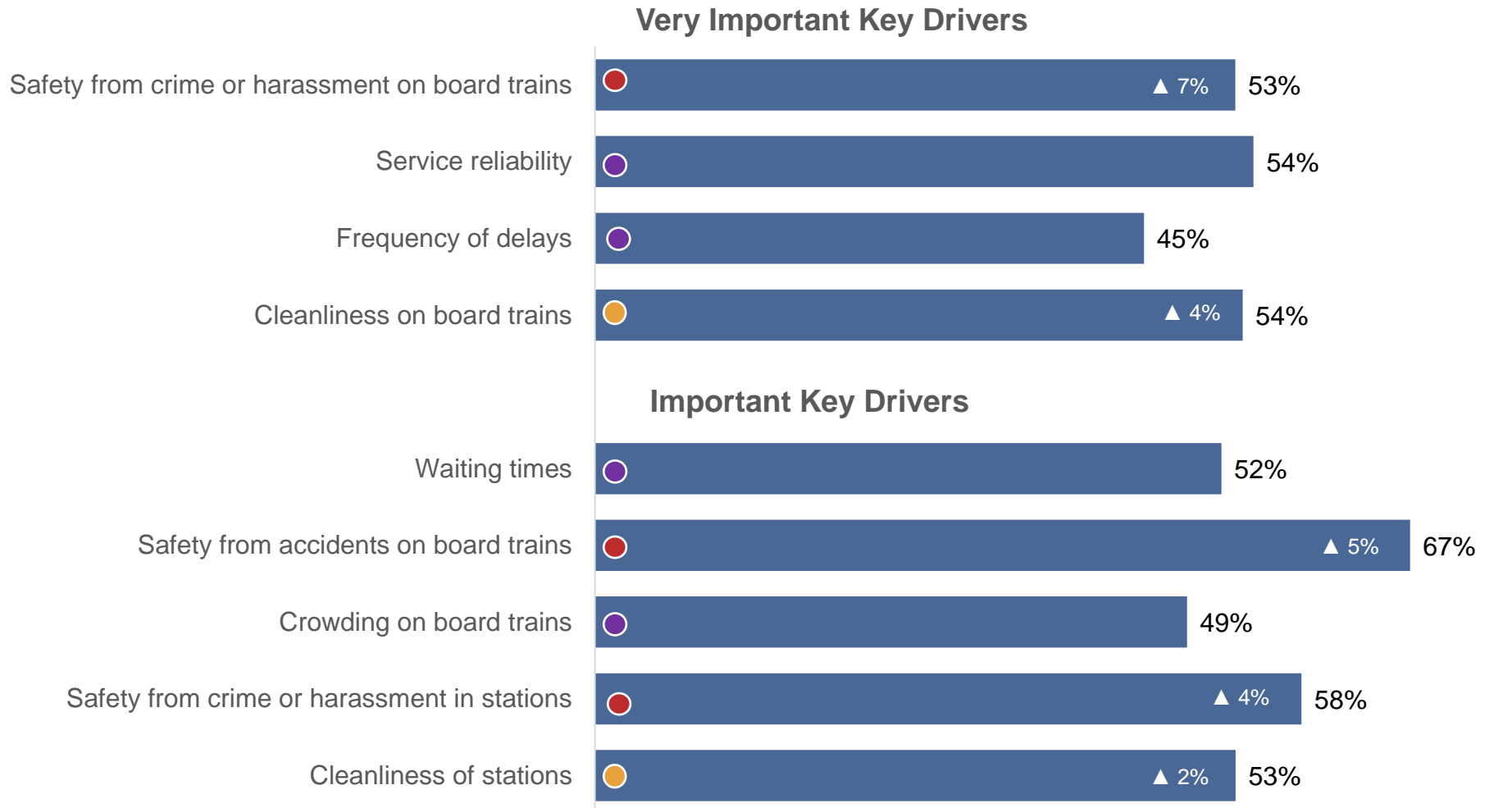
Subway: What Customers Say Will Increase Overall Subway Satisfaction by Boarding Borough

More reliable service is the most selected improvement item by customers in all boroughs except Manhattan, where they more commonly mention reducing quality-of-life concerns.



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

Subway Key Drivers: Attribute Satisfaction In Order of Attribute Importance



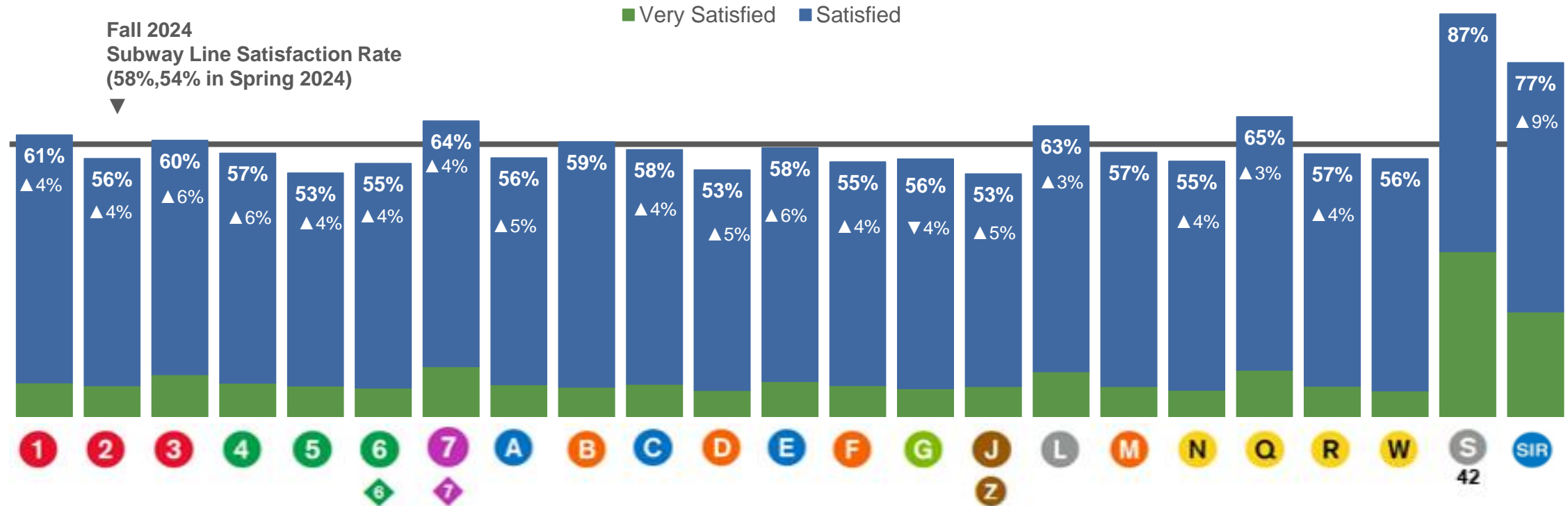
Question(s): How satisfied are you with your subway train? How satisfied are you with your station?

Base: Customers who used 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 2024 of attributes whose wording did not change

Subway: Overall Satisfaction On Board Rates by Line

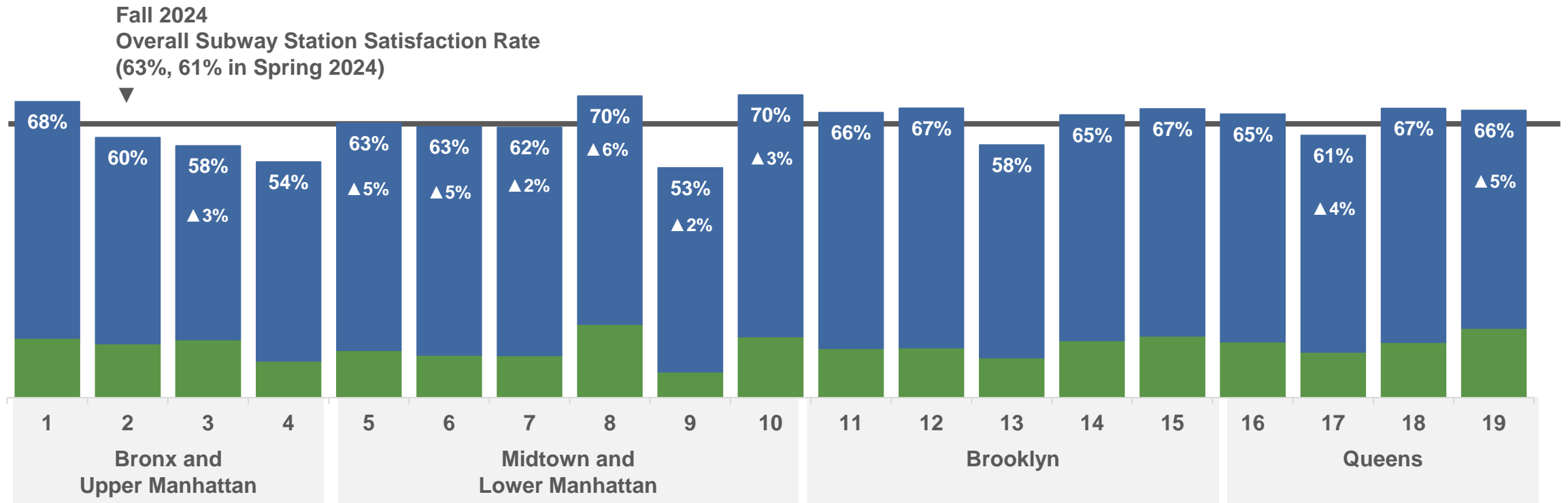
Most lines are up from the Spring survey, with the Q, 7, and L being the highest rated, with all above 60% of customers satisfied.



Question(s): How satisfied are you with the train line? Overall
 Base: Customers who used 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 2024

Subway: Overall Station Satisfaction by GSM Zone

Overall Station satisfaction increased in nearly half of all GSM zones, with GSM 8 & 10 back around 70%.



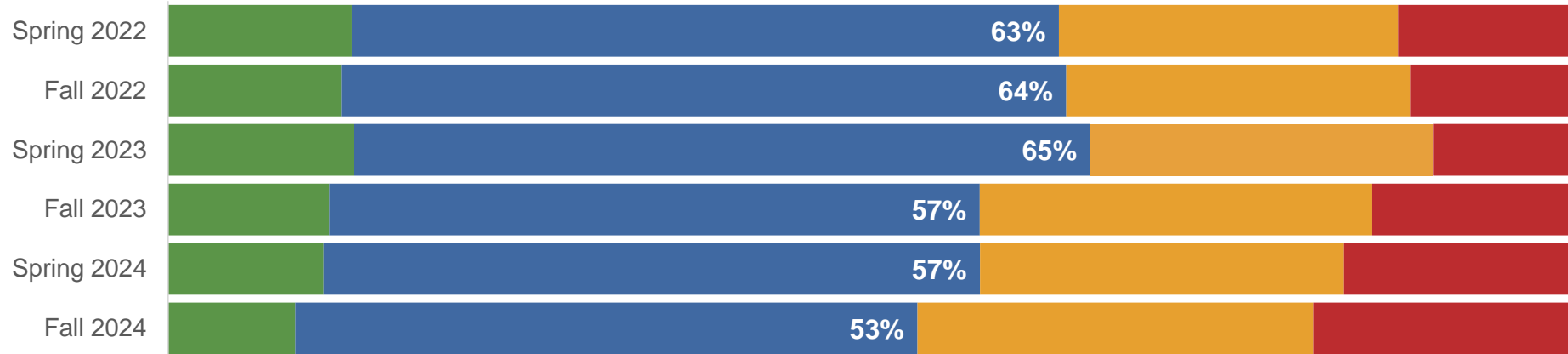
Question(s): How satisfied are you with the station? Overall

Base: Customers who used the subway at least once in the last 6 months

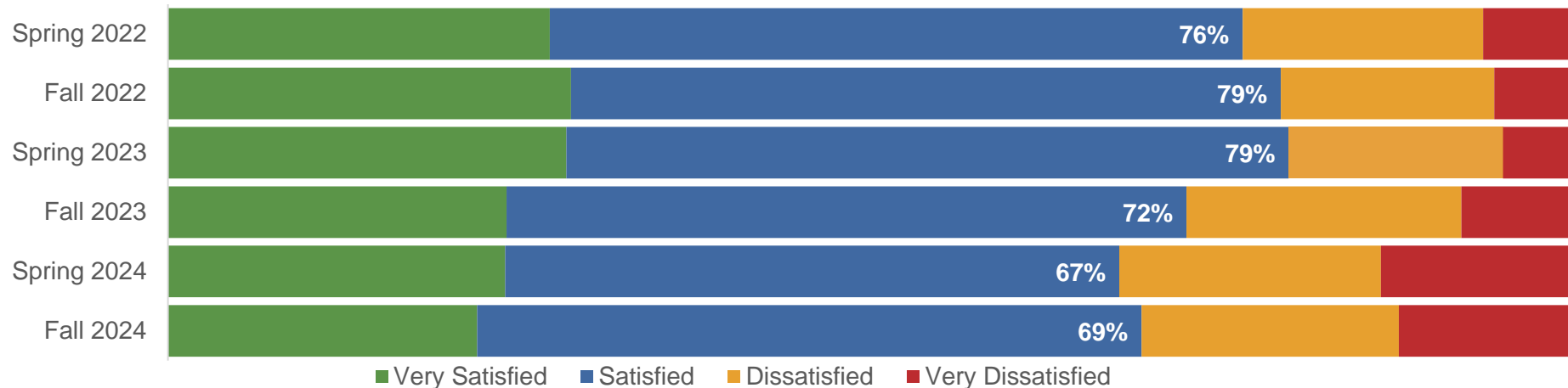
Percentage shown is total satisfied (rated 6-10); ▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2024

Bus: Overall Satisfaction

Overall Local Bus Satisfaction



Overall Express Bus Satisfaction



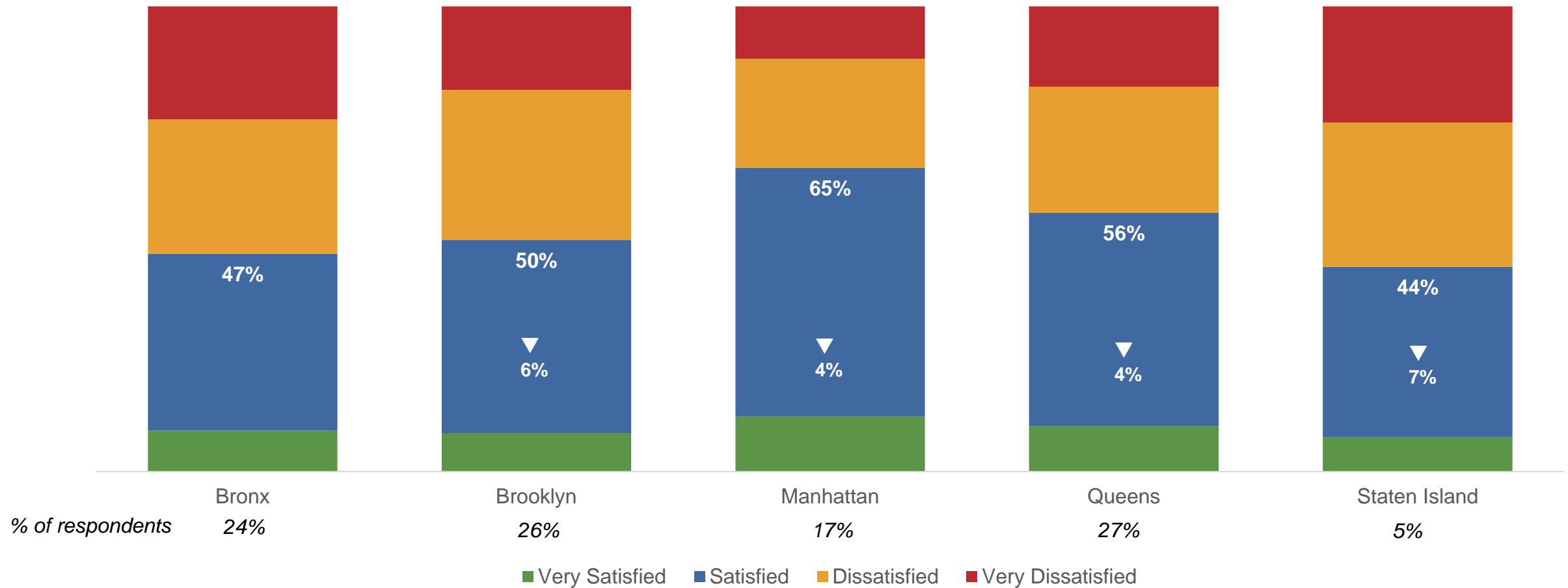
■ Very Satisfied ■ Satisfied ■ Dissatisfied ■ Very Dissatisfied

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)



Local Bus: Overall Satisfaction by Boarding Borough

Customer satisfaction decreased in four of the five boroughs since the Spring (flat in Bronx).



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)

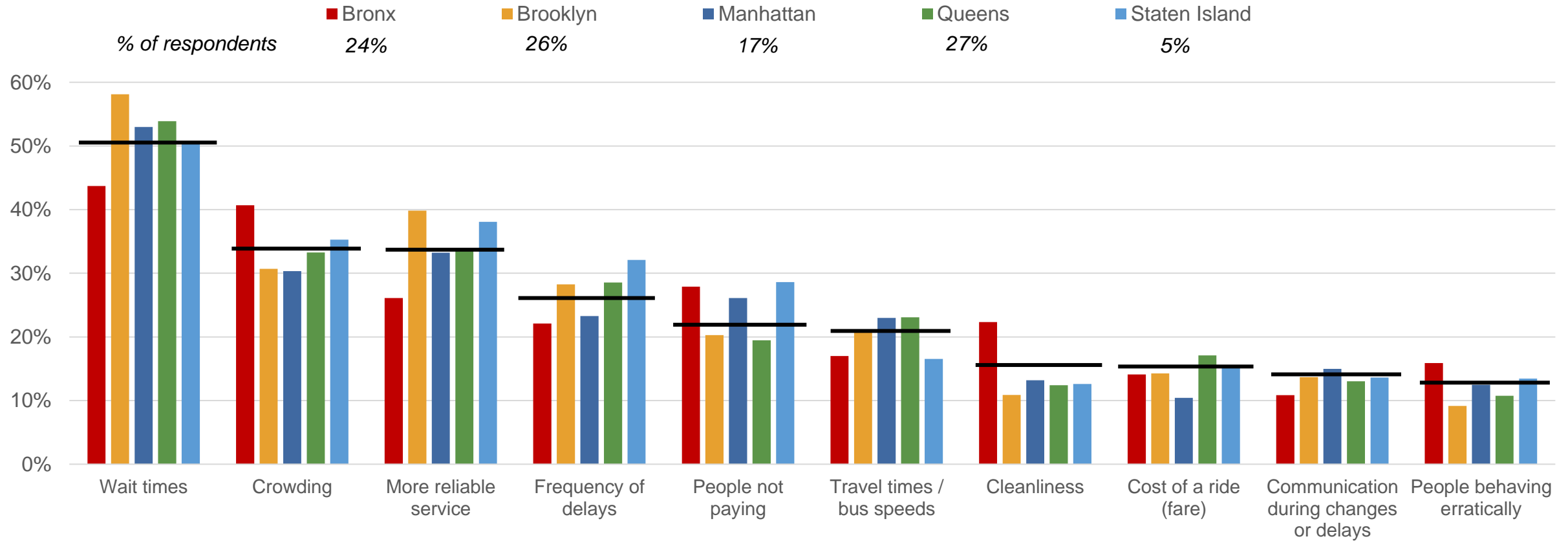
▲/▼ indicate significant increase/decrease at 90% Confidence Interval since Spring 2024

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Local Bus: What Customers Say Will Increase Overall Satisfaction

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



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

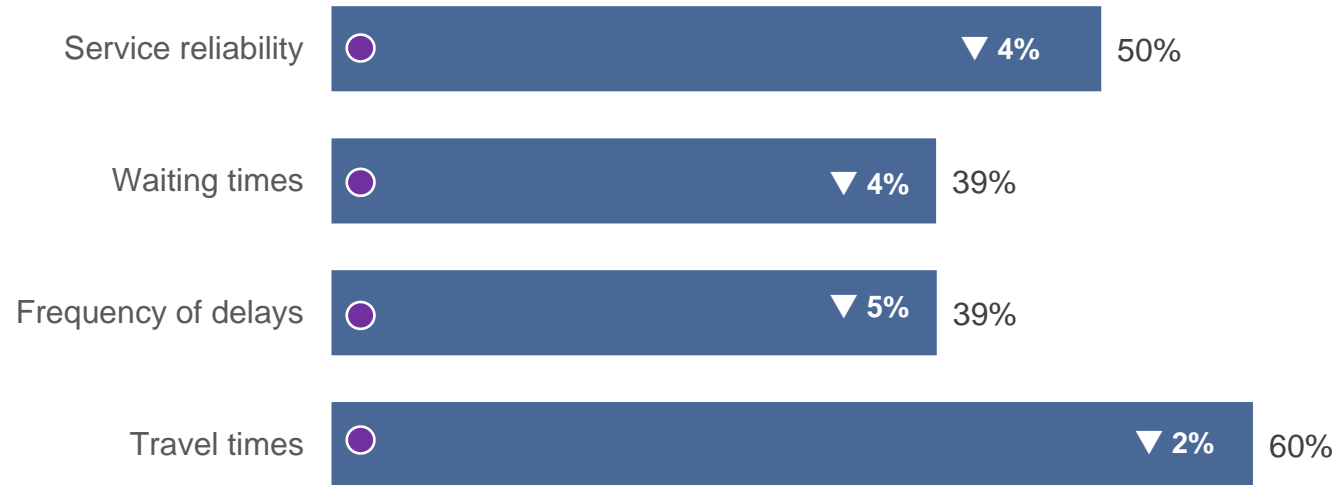
— Indicates % chose answer among Total



Local Bus Key Drivers: Attribute Satisfaction

In Order of Attribute Importance

Very Important Key Drivers



Attribute Concepts

- Service

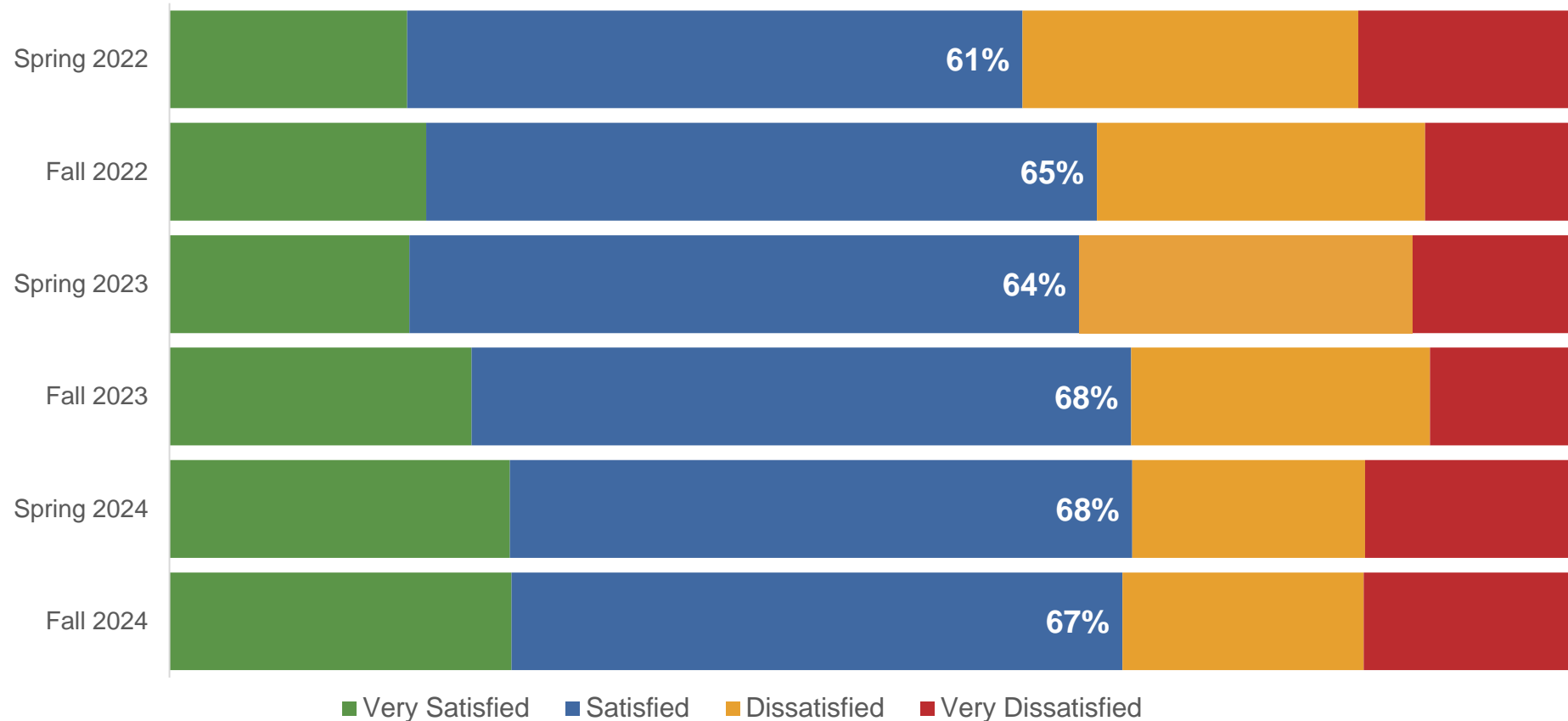
Important Key Drivers



Question(s): How satisfied are you with the following attributes?
Base: Customers who use the Bus at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10)
▲/▼ indicates a significant percentage point increase/decrease at a 90% confidence interval since Spring 2024



Access-A-Ride: Overall Satisfaction

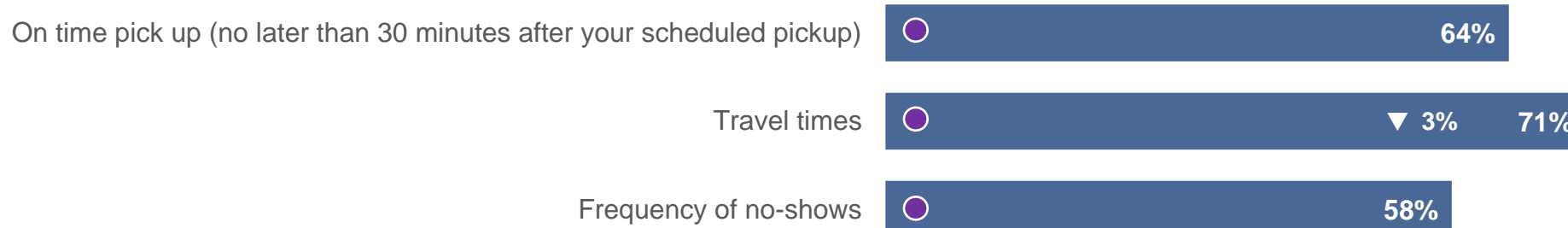


Question(s): In general, how satisfied are you with Access-A-Ride?
Base: Customers who have used Access-A-Ride at least once in the last 6 months
Percentage shown is total satisfied (rated 6-10)

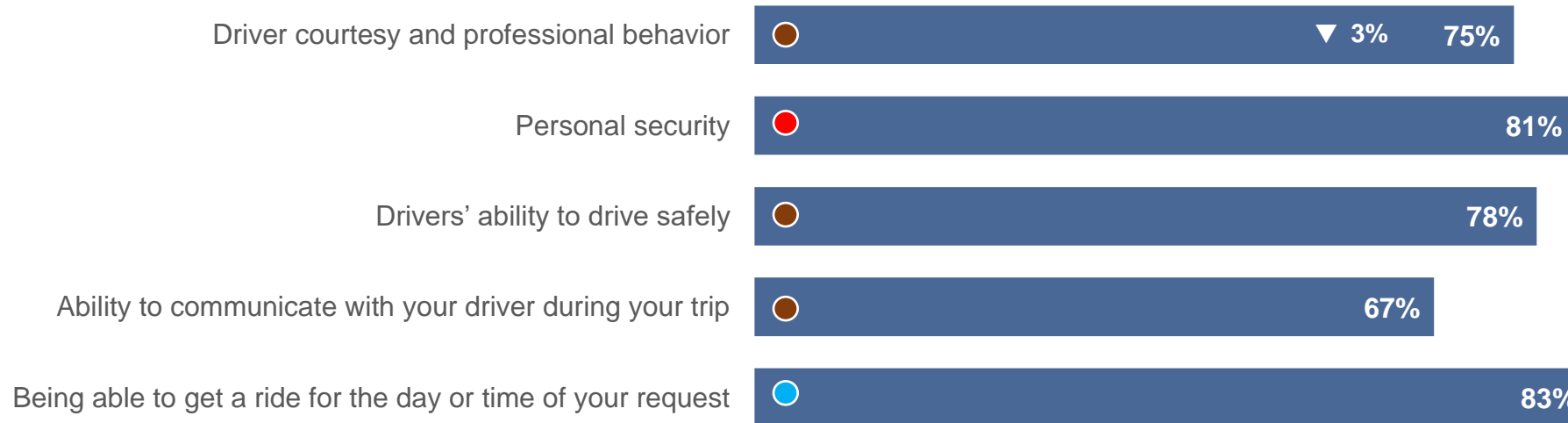
Access-A-Ride Key Drivers: Attribute Satisfaction

In Order of Attribute Importance

Very Important Key Drivers



Important Key Drivers



Attribute Concepts

- Service
- Reservations
- Safety / Security
- Drivers
- Other



Question(s): How satisfied are you with Access-A-Ride?

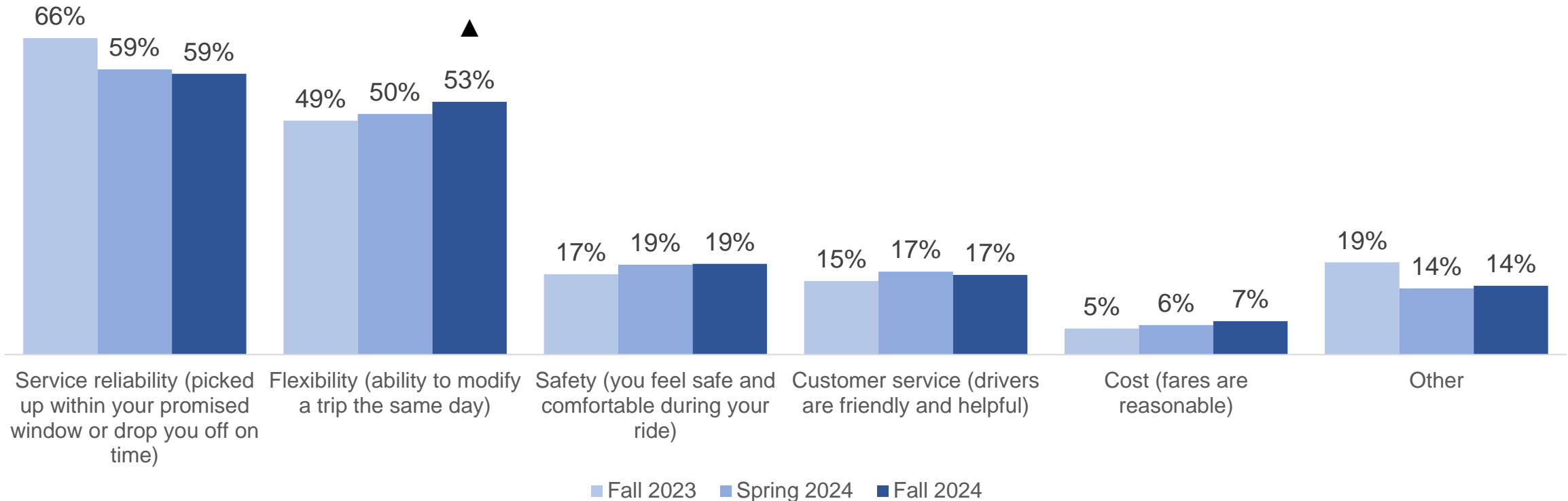
Base: Customers who have used Access-A-Ride at least once in the last 6 months

Percentage shown is total satisfied (rated 6-10)

▲/▼ indicates a significant percentage point increase/decrease at a 90% confidence interval since Spring 2024

AAR: What Customers Say Will Increase Overall Satisfaction

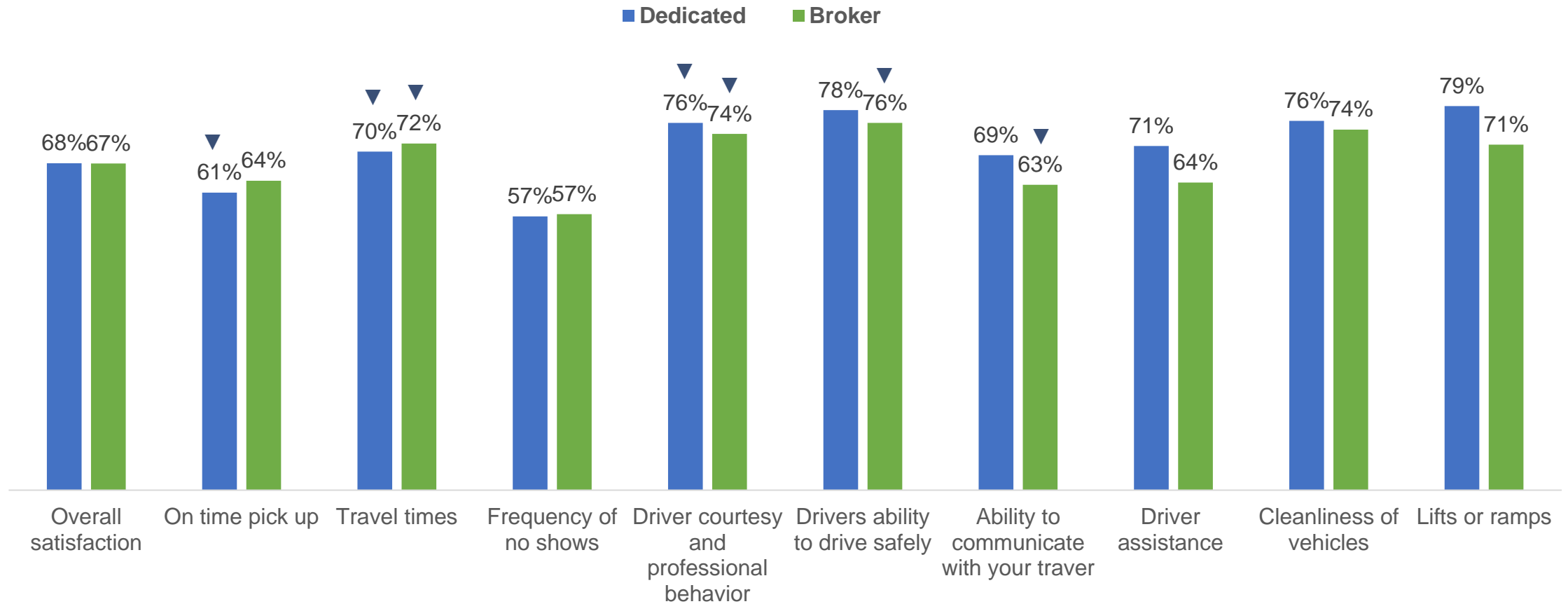
Flexibility continues to increase as what needs to improve to increase satisfaction among AAR customers, behind Service Reliability.



Question(s): Which of the following need to improve to most increase your satisfaction? Select up to two.
 Base: Customers who have used Access-A-Ride at least once in the last 6 months
 ▲/▼ indicates a significant percentage point increase/decrease at a 90% confidence interval since Spring 2024

AAR: Attribute Satisfaction by Provider

While there is no difference in overall satisfaction between dedicated carrier service and broker service, dedicated carrier generally scores better on attributes related to drivers.



Question: How satisfied are you with Access-A-Ride?

Base: Customers who have used Access-A-Ride at least once in the last 6 months and selected Blue/White Van and/or For-Hire

▲/▼ indicates a significant percentage point increase/decrease at a 90% confidence interval since Spring 2024

Fall 2024

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Subway Bus Access-A-Ride