

Customer
Satisfaction
Survey &
COVID Study

Subway
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. 83% of lapsed customers report their workplace has reopened or never closed. 91% 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. In Fall 2021, 67% of lapsed customers and 37% of current customers teleworked all or most of the time.
- Among lapsed customers, 54% indicated working from home and 41% indicated using an alternative mode as reasons they did not use the subway. Among lapsed customers who used alternative modes, 80% indicated concerns about COVID, 68% indicated crime and harassment, and 64% indicated crowding or social distancing as reasons.

Customers Count Executive Summary

- 58% of current customers used the subway more often before COVID. Most of these customers (62%) indicated the reason was that they were working from home. Slightly more than one-third (36%) indicated they used an alternative mode. Among current customers using alternative modes, 62% indicated concerns about COVID, 55% indicated crowding or social distancing, and 49% indicated crime and harassment as reasons.
- About two-thirds of current customers (65%) indicated they agree or strongly agree that MTA cleaning and disinfecting efforts make them feel safe when using the subway.
- About two-thirds of current customers (64%) indicated they feel safer or much safer with the presence of uniformed police officers in the subway system.

Customers Count Executive Summary

- The following were the rated as important or very important factors to influence most lapsed customers to return to the subway: subway feels safe from crime and harassment (90%), trains are better cleaned and disinfected (82%), social distancing concerns are resolved (79%), COVID vaccination (74%), working from home is no longer permitted (59%), cost of a ride (57%), workplace reopens (54%), and restrictions on travel are lifted (51%).

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.

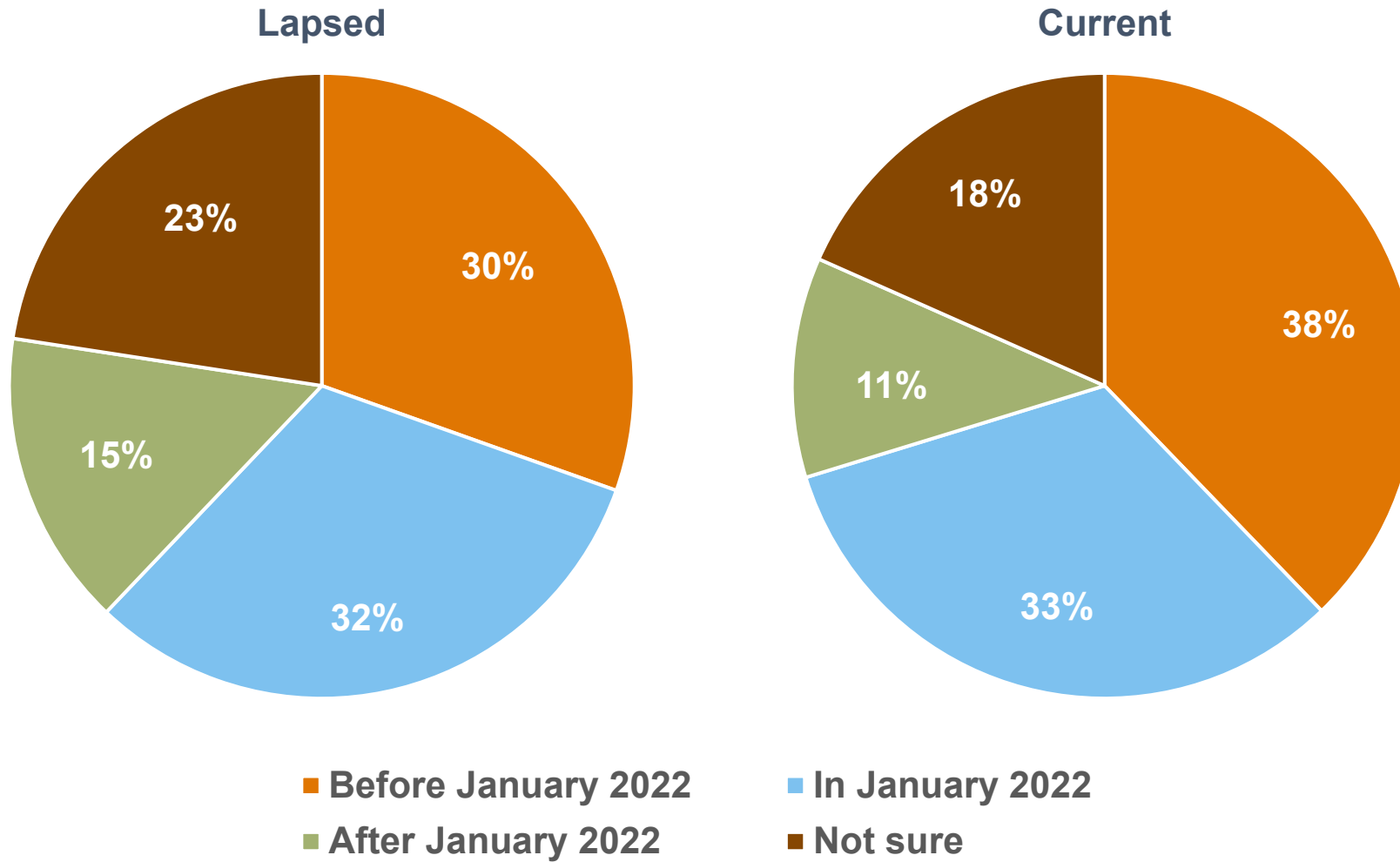
Research Methodology

- 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 57,186 valid responses, of which 52,319 responses were current, and 4,867 were lapsed.
- Data was weighted to represent the race, ethnicity and annual household incomes of our customers. Systemwide measures are the weighted average of all subway lines based on ridership.
- The margin of error for the total sample, the lapsed customer sample, and the current customer sample is less than 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	9%	4%
No, but plans on reopening at another location in NY Metropolitan area	3%	1%
No, but plans on reopening outside NY Metropolitan area	1%	<1%
No, does not plan on reopening/business closed	3%	2%
My business never closed/is currently opened	83%	91%
Don't know	1%	1%

Work Location Reopening Date: Lapsed vs. Current



Telecommuting Among Customers: Lapsed vs. Current

How often do you work from home?	Pre-COVID		Present	
	Lapsed	Current	Lapsed	Current
All the time	8%	8%	58%	23%
Usually	5%	4%	9%	14%
Sometimes	20%	14%	10%	18%
Rarely	22%	18%	6%	11%
Never	45%	56%	17%	35%

Trip Purpose: Lapsed vs. Current

Trip Purpose	Lapsed	Current
Work	67%	59%
Store, retail establishment, shopping center, restaurant, café, bar, or club	5%	12%
Friend or relative's home	7%	7%
Medical or mental health clinic, office, or facility	5%	7%
School	2%	6%
Entertainment venue, cultural institution, or library	6%	4%
Park, outdoor space, gym, or recreation facility	4%	3%
Religious institution, community center, or senior center	1%	1%
Other	4%	4%

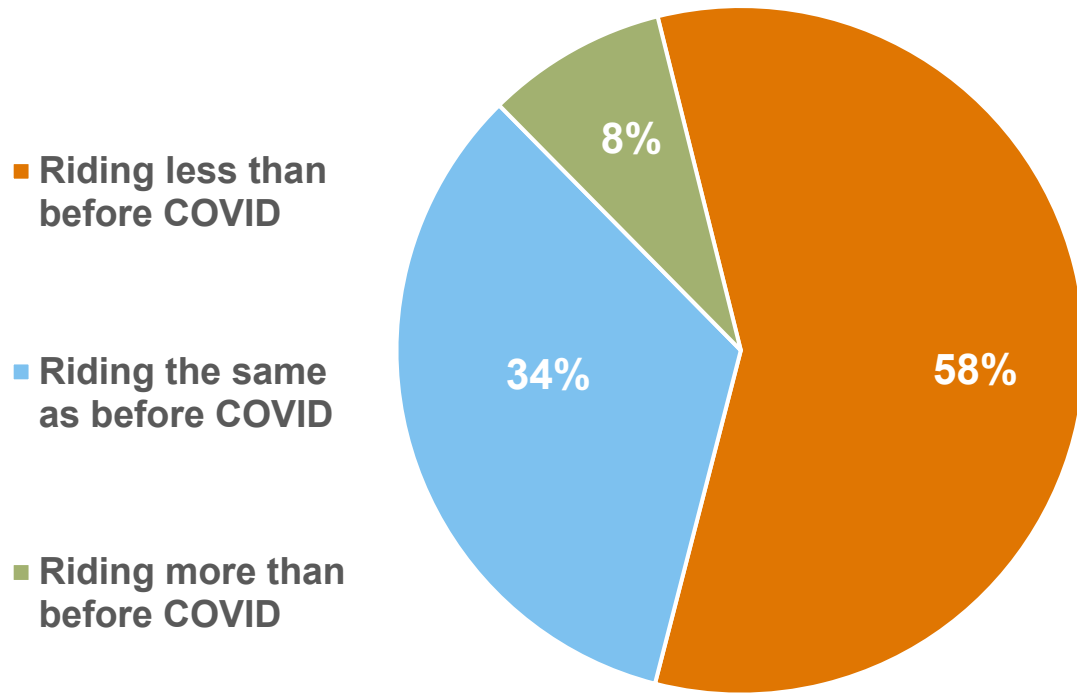
Time of Day Usage: Lapsed vs. Current

What time does your trip start?	Lapsed	Current
6:30am to 9:30am	63%	50%
9:30am to 3:30pm	23%	31%
3:30pm to 8:00pm	7%	10%
8:00pm to 12:00am	1%	1%
12:00am to 6:30am	6%	7%

Lapsed Customers: Reasons for Not Using the Subway

Reasons for not using*	Lapsed
Working from home	54%
Using a different mode	41%
Moved to a different residence	19%
Lifestyle change	14%
Different work location	9%
Unemployed	9%
Change in my health	6%
Retired	6%
Change of jobs	6%
Non-work destinations are closed	6%
Furloughed	1%
Other	25%

Current Customers: Reasons for Using the Subway Less



Reasons for using less*	Current
Working from home	62%
Using a different mode	36%
Lifestyle change	20%
Unemployed	11%
Non-work destinations closed	11%
Moved to a different residence	10%
Change of jobs	9%
Different work location	8%
Retired	4%
Change in my health	3%
Furloughed	2%
Other	12%

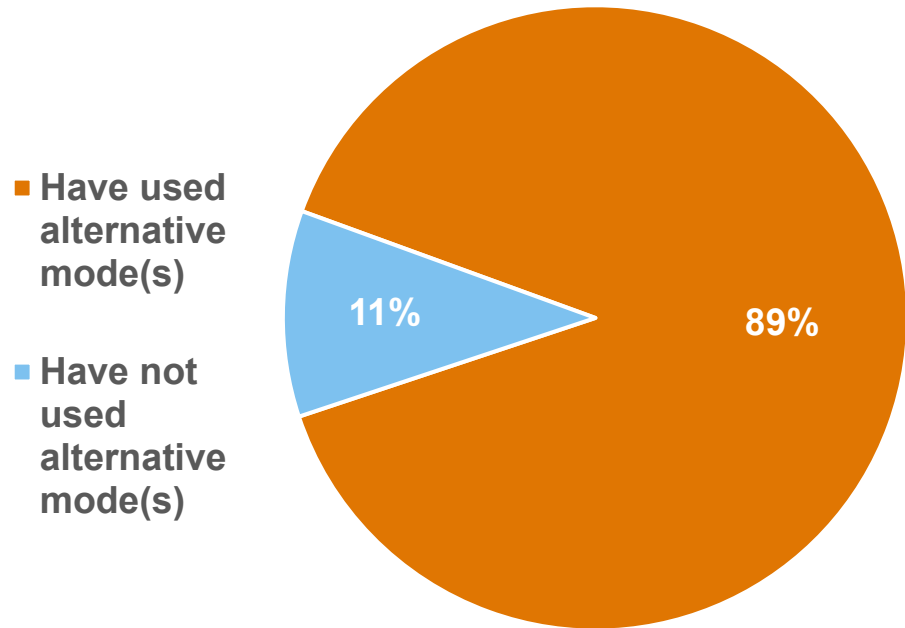
*Multiple responses allowed so may add up to more than 100%.

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

Reasons for using a different mode?*	Lapsed	Current
Concerns about COVID	80%	62%
Subway is crowded / unable to social distance	64%	55%
I don't feel safe from crime and harassment on the subway	68%	49%
Subway is not reliable	29%	35%
Subway takes longer	47%	29%
Subway is not clean	22%	33%
Subway is more expensive	12%	22%
Other	10%	20%

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

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



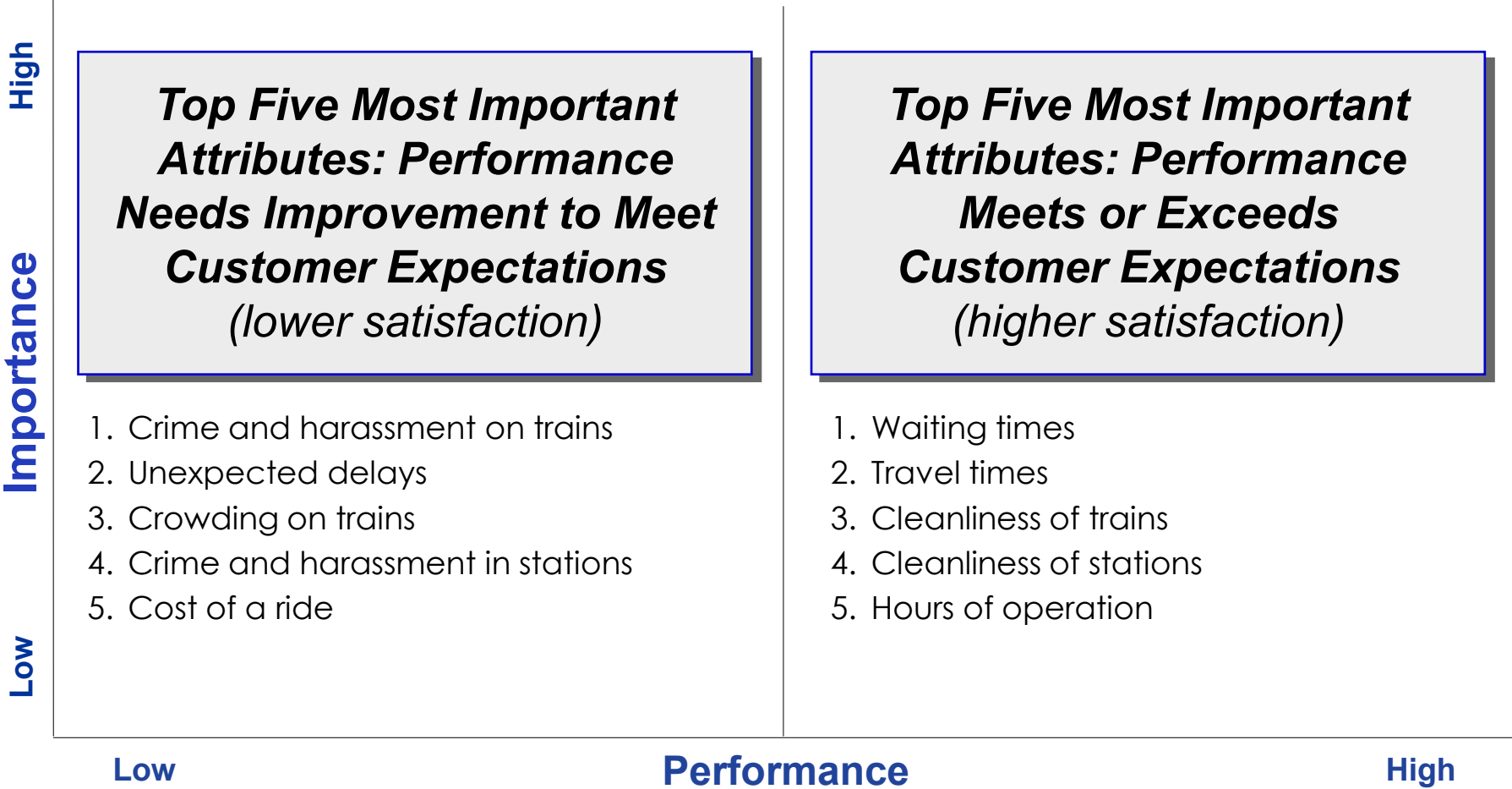
Which mode(s) have you been using?*	Current and Lapsed
Walk	67%
For hire vehicle	39%
Local, Limited and SBS bus	36%
Driver of owned personal vehicle	23%
Bicycle or scooter	21%
Passenger in personal vehicle	14%
Long Island Rail Road	12%
Express bus	10%
Ferry	9%
Metro-North Railroad	9%
Driver of rented/borrowed personal vehicle	5%
Other bus or jitney	3%
Other train or light-rail	2%
Access-A-Ride Paratransit	1%
Tramway	1%
Staten Island Railway	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%	38%	37%
7-Day Unlimited MetroCard	6%	9%	7%
30-Day Unlimited MetroCard	31%	28%	16%
7-Day Unlimited Express Bus Plus	<1%	<1%	<1%
EasyPayXpress Pay-Per-Ride MetroCard	5%	3%	3%
EasyPayXpress 30-Day Unlimited MetroCard	1%	1%	1%
Single Ride ticket from a MetroCard vending machine	1%	1%	1%
OMNY Pay-Per-Ride	2%	4%	20%
Pay-Per-Ride Reduced-Fare MetroCard	4%	4%	4%
7-Day Unlimited Reduced-Fare MetroCard	<1%	1%	1%
30-Day Unlimited Reduced-Fare MetroCard	1%	2%	1%
EasyPay Reduced-Fare MetroCard	4%	3%	3%
Access-A-Ride MetroCard	1%	1%	1%
Student MetroCard or pass	1%	1%	1%
Employee pass	1%	2%	1%
Other	3%	3%	3%

Subway Customer Key Drivers



Current Customers: Service and Travel Information Sources

Which service and travel information sources do you use?*	Percent
MTA website	53%
MYmta app	51%
Other (non-MTA) app	22%
MTA social media (Twitter, Facebook, WhatsApp, etc.)	17%
Friends and family	15%
My MTA Alerts	13%
TV, radio, newspaper, or news website	11%
Notify NYC	9%
Other (non-MTA) social media	6%
511	1%

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

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

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	88%
I wear a mask to protect others	88%
I wear a mask to abide by the law	82%
MTA cleaning and disinfecting efforts make me feel safe	65%

How safe does the presence of each of the following make you feel?	Safer or Much Safer
Uniformed Police officers	64%
MTA staff	57%
Uniformed security guards	54%
Customer ambassadors/volunteers	39%

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
Subway feels safe from crime and harassment	90%	78%
Trains are better cleaned and disinfected	82%	70%
COVID vaccination	74%	68%
Social distancing concerns are resolved	79%	68%
Workplace reopens	54%	66%
Working from home is no longer permitted	59%	62%
Cost of a ride	57%	62%
Your school or college reopens	38%	60%
Child's school reopens	37%	57%
Non-work destinations reopen	43%	55%
Entertainment venues reopen	39%	53%
Restrictions on travel are lifted	51%	47%

Concerns About the Future: Lapsed vs Current

Concern	Lapsed Concerned or Very Concerned	Current Concerned or Very Concerned
Mask wearing	76%	55%
Crime and harassment	79%	51%
Social distancing	66%	47%
Health safety	75%	46%
Cleanliness	67%	41%

Key Take-aways

- A large majority of employed customers work in locations that never closed or have already reopened. 83% of lapsed customers report their workplace has reopened or never closed. 91% of current customers report their workplace has reopened or never closed.
- Among lapsed customers with closed workplaces that intend to reopen, 30% indicated their workplace will reopen before January 2022, 32% indicated it will reopen in January 2022, 15% indicated it will reopen after January 2022, and 23% don't know. Among current customers with closed workplaces that intend to reopen, 38% indicated their workplace will reopen before January 2022, 33% indicated it will reopen in January 2022, 11% indicated it will reopen after January 2022, and 18% 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, 67% of lapsed customers and 37% of current customers reported teleworking all or most of the time.

Key Take-aways

- 58% of current customers used the subway more often before COVID. Most of these customers (62%) indicated the reason was that they were working from home. Slightly more than one-third (36%) indicated they used an alternative mode. Among current customers who used alternative modes, 62% indicated concerns about COVID, 55% indicated crowding or social distancing, and 49% indicated crime and harassment as reasons.
- Among both lapsed and current customers who used alternative modes, about two-thirds (67%) indicated they walked for part or all of at least one trip they made by subway before COVID. The most used alternative modes for pre-COVID subway trips include for hire vehicles (39%), local buses (36%), personal vehicles as driver (23%), and bicycles/scooters (21%).
- Current customers used 30-Day Unlimited MetroCards to pay their fare more often before COVID (28%) than they did in Fall 2021 (16%). Conversely, only 4% of current customers used OMNY before COVID compared to 20% in Fall 2021.

Key Take-aways

- The top four service and travel information sources among current subway customers are MTA website (53%), MYmta app (51%), other (non-MTA) apps (22%), and MTA social media (27%).
- About two-thirds of current customers (65%) indicated they agree or strongly agree that MTA cleaning and disinfecting efforts make them feel safe when using the subway.
- About two-thirds of current customers (64%) indicated they feel safer or much safer with the presence of uniformed police officers in the subway system.
- The following factors were rated highest in importance for lapsed customers in their decision to return to the subway: subway feels safe from crime and harassment (90%), trains are better cleaned and disinfected (82%), social distancing concerns are resolved (79%), COVID vaccination (74%), working from home is no longer permitted (59%), cost of a ride (57%), workplace reopens (54%), and restrictions on travel are lifted (51%).

Key Take-aways

- The following factors were rated highest in importance for current customers in their decision to use the subway more often: subway feels safe from crime and harassment (78%), trains are better cleaned and disinfected (70%), COVID vaccination (68%), social distancing concerns are resolved (68%), workplace reopens (66%), working from home is no longer permitted (62%), cost of a ride (62%), school or college reopens (60%), child's school reopens (57%), non-work destinations reopen (55%), and entertainment venues reopen (53%).
- Considering the future, crime and harassment was the most concerning/very concerning to lapsed customers (79%). Mask wearing was the most concerning/very concerning to current customers (55%). Concerning/very concerning rates were greater for lapsed customers (66% to 79%), than they were for current customers (41% to 51%).