MTS Customer Satisfaction Survey Results

MTS Board of Directors

September 15, 2022
## Methodology

<table>
<thead>
<tr>
<th>Transit Mode</th>
<th>Sample Size</th>
<th>Percent Distribution</th>
<th>Statistical Precision at 95% Confidence Level</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System-wide</strong></td>
<td>1,842</td>
<td>100%</td>
<td>± 2.3%</td>
</tr>
<tr>
<td><strong>Bus</strong></td>
<td>918</td>
<td>49.9%</td>
<td>± 3.2%</td>
</tr>
<tr>
<td><strong>Trolley</strong></td>
<td>924</td>
<td>50.1%</td>
<td>± 3.2%</td>
</tr>
</tbody>
</table>

- Sampling plan and survey jointly developed with MTS based on ridership
- Onboard tablet survey plus text-in option
- Multi-language options English, Spanish, Chinese and Tagalog
- Data collection April 2022 – prior to launch of Youth Opportunity Pass
Demographics
Customer Profile

- Use Bus (74%)
- Trolley (81%)
- Ride MTS at least 3 times a week (80%)
- 86% complete their trip with one or less transfers
- Half of riders complete their trip without a transfer
- Vehicle availability (30%)
- Employed (61%)
  - Full-time 38%
  - Part-time 23%
- Student (26%)
- Disability (12%)
Customer Profile

- Annual income less than $50K (84%)
- Annual income less than $20K (55%)
- More likely to be Hispanic (49%)
- Speak a language other than English at home (36%)
  - and of those 61% speak English “well” or “very well”
- Smartphone availability (91%)
Ethnicity

Ethnicity 2022 vs 2019

- **Asian**: 9% (2022) vs 8% (2019)
- **Black/African American**: 11% (2022) vs 12% (2019)
- **Hispanic/Latino**: 49% (2022) vs 47% (2019)
- **White (not Hispanic)**: 24% (2022) vs 22% (2019)
- **Multi-racial**: 4% (2022) vs 7% (2019)
- **Other**: 4% (2022) vs 4% (2019)
03 System Satisfaction

Customer Satisfaction Results

Percentages may not total 100% due to rounding or multiple response options
Systemwide Rider Satisfaction

• Systemwide customer satisfaction is high
• On par with 2019 (91%)
Overall Rider Satisfaction by Mode

Trolley

Satisfaction of Overall Quality of Transit Service by Trolley

- 2022: 90%
- 2019: 91%

Bus

Satisfaction of Overall Quality of Transit Service by Bus

- 2022: 94%
- 2019: 92%

Overall satisfaction of Trolley riders is statistically unchanged

Overall satisfaction of bus riders directionally higher
Service Attributes Satisfaction – Systemwide

- **Weekday frequency**
  - Very Satisfied: 36%
  - Satisfied: 54%
  - Dissatisfied: 7%
  - Very Dissatisfied: 2%

- **Cost of fare**
  - Very Satisfied: 34%
  - Satisfied: 55%
  - Dissatisfied: 9%
  - Very Dissatisfied: 2%

- **Hours of operation**
  - Very Satisfied: 32%
  - Satisfied: 52%
  - Dissatisfied: 13%
  - Very Dissatisfied: 4%

- **Trip duration**
  - Very Satisfied: 29%
  - Satisfied: 58%
  - Dissatisfied: 11%
  - Very Dissatisfied: 3%

- **Night frequency and reliability**
  - Very Satisfied: 27%
  - Satisfied: 50%
  - Dissatisfied: 17%
  - Very Dissatisfied: 6%

- **Weekend frequency**
  - Very Satisfied: 23%
  - Satisfied: 46%
  - Dissatisfied: 22%
  - Very Dissatisfied: 9%
Customer Service/Facility Attributes – Systemwide

Customer Service/Facility Attributes

- Quality/availability of customer support services: 35% Very Satisfied, 55% Satisfied, 7% Dissatisfied, 3% Very Dissatisfied
- Amenities: 29% Very Satisfied, 55% Satisfied, 13% Dissatisfied, 3% Very Dissatisfied
- Cleanliness of buses and Trolleys: 28% Very Satisfied, 51% Satisfied, 17% Dissatisfied, 4% Very Dissatisfied
- Cleanliness of stops and stations: 25% Very Satisfied, 52% Satisfied, 18% Dissatisfied, 5% Very Dissatisfied
Service Attributes by Bus and Trolley

- Weekday frequency: 92% Bus, 90% Trolley
- Trip duration: 88% Bus, 85% Trolley
- Hours of operation (how early and late service runs): 85% Bus, 82% Trolley
- Night frequency and reliability: 80% Bus, 74% Trolley
- Weekend frequency: 69% Bus, 70% Trolley
Service Attributes - Trolley Line

Bar chart showing service attributes by trolley lines:
- Weekday frequency: 89% (Blue Line), 91% (Green Line), 89% (Orange Line)
- Trip duration: 86% (Blue Line), 81% (Green Line), 87% (Orange Line)
- Hours of operation: 85% (Blue Line), 75% (Green Line), 83% (Orange Line)
- Night frequency and reliability: 77% (Blue Line), 65% (Green Line), 75% (Orange Line)
- Weekend frequency: 72% (Blue Line), 60% (Green Line), 73% (Orange Line)
Customer Service/Facility Attributes – Systemwide

Customer Service/Facility Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality/availability of customer support services</td>
<td>35%</td>
<td>55%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Amenities</td>
<td>29%</td>
<td>55%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Cleanliness of buses and Trolleys</td>
<td>28%</td>
<td>51%</td>
<td>17%</td>
<td>4%</td>
</tr>
<tr>
<td>Cleanliness of stops and stations</td>
<td>25%</td>
<td>52%</td>
<td>18%</td>
<td>5%</td>
</tr>
</tbody>
</table>

High level of customer satisfaction with quality and availability of customer support – 90%
Customer Service/Facility Attributes – Bus and Trolley

Customer Attributes by Bus and Trolley

- Quality/availability of customer support services: 93% (Bus), 87% (Trolley)
- Cleanliness of buses and Trolleys: 86% (Bus), 72% (Trolley)
- Amenities: 86% (Bus), 82% (Trolley)
- Cleanliness of stops and stations: 82% (Bus), 74% (Trolley)
Cleanliness of Buses and Trolleys

<table>
<thead>
<tr>
<th></th>
<th>Systemwide</th>
<th>Bus</th>
<th>Trolley</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>79%</td>
<td>86%</td>
<td>72%</td>
</tr>
<tr>
<td>2019</td>
<td>81%</td>
<td>86%</td>
<td>74%</td>
</tr>
</tbody>
</table>

0% 20% 40% 60% 80% 100%
Cleanliness of Transit Stops and Stations

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systemwide</td>
<td>77%</td>
<td>76%</td>
</tr>
<tr>
<td>Bus</td>
<td>82%</td>
<td>77%</td>
</tr>
<tr>
<td>Trolley</td>
<td>74%</td>
<td>79%</td>
</tr>
</tbody>
</table>
Fare and PRONTO Satisfaction

Percentages may not total 100% due to rounding or multiple response options
Satisfaction with Fare

Significant improvement in satisfaction with fares (89% vs. 73%)
PRONTO Satisfaction

Overall satisfaction with PRONTO

Systemwide: 41% Very Satisfied, 51% Satisfied, 5% Dissatisfied, 1% Very Dissatisfied

Bus: 44% Very Satisfied, 50% Satisfied, 5% Dissatisfied, 1% Very Dissatisfied

Trolley: 38% Very Satisfied, 53% Satisfied, 6% Dissatisfied, 2% Very Dissatisfied

PRONTO Satisfaction: 92%
Satisfaction with PRONTO Attributes

PRONTO: How satisfied are you with each of the following aspects of the PRONTO card and app system?

- **Free transfers**
  - Very Satisfied: 45%
  - Satisfied: 51%
  - Dissatisfied: 3%
  - Very Dissatisfied: 1%

- **Loading PRONTO**
  - Very Satisfied: 41%
  - Satisfied: 52%
  - Dissatisfied: 4%
  - Very Dissatisfied: 3%

- **Stored value**
  - Very Satisfied: 40%
  - Satisfied: 55%
  - Dissatisfied: 4%
  - Very Dissatisfied: 1%

- **Validator locations**
  - Very Satisfied: 34%
  - Satisfied: 55%
  - Dissatisfied: 8%
  - Very Dissatisfied: 2%
05 Safety Satisfaction

Percentages may not total 100% due to rounding or multiple response options
Safety Onboard and Stations

Overall Satisfaction on Safety of Buses and Trolley & Stops and Stations

Overall safety on buses and Trolleys
- Very Satisfied: 29%
- Satisfied: 52%
- Dissatisfied: 13%
- Very Dissatisfied: 5%

Overall safety at stops and stations
- Very Satisfied: 27%
- Satisfied: 53%
- Dissatisfied: 14%
- Very Dissatisfied: 5%
Safety while Riding Buses or Trolleys

Satisfaction with overall safety on buses and Trolleys

- **Systemwide**
  - 2022: 81%
  - 2019: 86%

- **Bus**
  - 2022: 88%
  - 2019: 89%

- **Trolley**
  - 2022: 76%
  - 2019: 81%
Safety at Bus Stops/Stations

Satisfaction with overall safety at stops and stations

<table>
<thead>
<tr>
<th>Year</th>
<th>Systemwide</th>
<th>Bus</th>
<th>Trolley*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>86%</td>
<td>86%</td>
<td>86%</td>
</tr>
<tr>
<td>2022</td>
<td>80%</td>
<td>86%</td>
<td>76%</td>
</tr>
</tbody>
</table>

*2019 Trolley safety not measured
Satisfaction with Safety by Gender

There is a statistical difference in satisfaction with perceived safety on buses and Trolleys and safety at stops and stations relative to gender and women are less satisfied than men.
Overall Satisfaction with Safety by Age

Persons who under 25 are less satisfied with perceived overall safety than other age groups. There is not a significant difference between those 25-54 and those 55+.
Visible Security

Overall Satisfaction with Visible Security

Visible security on Trolleys:
- Very Satisfied: 26%
- Satisfied: 50%
- Dissatisfied: 17%
- Very Dissatisfied: 8%

Visible security at stations:
- Very Satisfied: 26%
- Satisfied: 51%
- Dissatisfied: 15%
- Very Dissatisfied: 7%
Visible Security by Gender

Persons who identify as female are less satisfied than persons who identify as male with perceived visible security at stations and on the Trolley.
Visible Security by Age

Visible security at stations by Age

- 13-24: Very Satisfied 22%, Satisfied 53%, Dissatisfied 17%, Very Dissatisfied 7%
- 25-54: Very Satisfied 28%, Satisfied 50%, Dissatisfied 14%, Very Dissatisfied 8%
- 55-65+: Very Satisfied 27%, Satisfied 50%, Dissatisfied 16%, Very Dissatisfied 7%

Visible security on Trolleys by Age

- 13-24: Very Satisfied 20%, Satisfied 55%, Dissatisfied 17%, Very Dissatisfied 8%
- 25-54: Very Satisfied 27%, Satisfied 49%, Dissatisfied 16%, Very Dissatisfied 8%
- 55-65+: Very Satisfied 28%, Satisfied 47%, Dissatisfied 17%, Very Dissatisfied 8%

There is no statistical difference in satisfaction with visible security either at stations or on the Trolley between any of the age groups.
Response Time and Lighting

Overall Satisfaction Response Time and Lighting

<table>
<thead>
<tr>
<th>Security response time</th>
<th>29%</th>
<th>52%</th>
<th>11%</th>
<th>7%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting at night for stops or stations</td>
<td>29%</td>
<td>54%</td>
<td>13%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Very Satisfied | Satisfied | Dissatisfied | Very Dissatisfied
Response Time and Lighting by Gender

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting at night for stops or stations</td>
<td>31%</td>
<td>55%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Time it takes for security to respond to a situation</td>
<td>31%</td>
<td>50%</td>
<td>11%</td>
<td>8%</td>
</tr>
</tbody>
</table>

There is no statistical difference in satisfaction with response time relative to gender.
There is a statistical difference in satisfaction with lighting at stops and station relative to gender and women are less satisfied than men.
Response Time and Lighting by Age

There is no statistical difference in visible security between any of the age groups.
Courteous of Security Team

High level of customer satisfaction with courtesy of the security team – 89%
Courteous of Security Team by Ethnicity

- **Asian**
  - Very Satisfied: 37%
  - Satisfied: 57%
  - Dissatisfied: 4%
  - Very Dissatisfied: 2%

- **African American**
  - Very Satisfied: 33%
  - Satisfied: 56%
  - Dissatisfied: 8%
  - Very Dissatisfied: 3%

- **Hispanic**
  - Very Satisfied: 37%
  - Satisfied: 54%
  - Dissatisfied: 6%
  - Very Dissatisfied: 3%

- **White**
  - Very Satisfied: 33%
  - Satisfied: 55%
  - Dissatisfied: 7%
  - Very Dissatisfied: 5%

- **Multiracial**
  - Very Satisfied: 32%
  - Satisfied: 42%
  - Dissatisfied: 16%
  - Very Dissatisfied: 11%

- **Other**
  - Very Satisfied: 30%
  - Satisfied: 53%
  - Dissatisfied: 11%
  - Very Dissatisfied: 6%
Behavior of Other Passengers

Behavior of other passengers or comfort of riding with other passengers

- **2022**: 18% Very Satisfied, 49% Satisfied, 22% Dissatisfied, 11% Very Dissatisfied
- **2019**: 26% Very Satisfied, 52% Satisfied, 16% Dissatisfied, 5% Very Dissatisfied
- **2017**: 26% Very Satisfied, 56% Satisfied, 14% Dissatisfied, 5% Very Dissatisfied
Frequency of Fare Check – Trolley Line

Frequency of fare check by Trolley Line

<table>
<thead>
<tr>
<th></th>
<th>Blue Line</th>
<th>Green Line</th>
<th>Orange Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every/most trips I take</td>
<td>49%</td>
<td>43%</td>
<td>54%</td>
</tr>
<tr>
<td>About half the time</td>
<td>19%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Rarely/never</td>
<td>32%</td>
<td>34%</td>
<td>33%</td>
</tr>
</tbody>
</table>

MTS Metropolitan Transit System

39
Trolley Fare Check by Ethnicity

When you ride the Trolley, how often is your fare checked?

- **Asian**
  - Never: 9%
  - Rarely: 18%
  - About half the time: 19%
  - On most trips I take: 26%
  - Every trip I take: 28%
  - Multiple times on one trip: 1%

- **African American**
  - Never: 12%
  - Rarely: 15%
  - About half the time: 22%
  - On most trips I take: 26%
  - Every trip I take: 17%
  - Multiple times on one trip: 6%

- **Hispanic**
  - Never: 13%
  - Rarely: 17%
  - About half the time: 26%
  - On most trips I take: 23%
  - Every trip I take: 33%
  - Multiple times on one trip: 5%

- **White**
  - Never: 12%
  - Rarely: 8%
  - About half the time: 14%
  - On most trips I take: 16%
  - Every trip I take: 23%
  - Multiple times on one trip: 12%

- **Multiracial**
  - Never: 12%
  - Rarely: 10%
  - About half the time: 16%
  - On most trips I take: 23%
  - Every trip I take: 28%
  - Multiple times on one trip: 12%
Fare Check by Ethnicity

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Overall</th>
<th>Blue</th>
<th>Green</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>White - Asian</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>White - Black/African American</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>White - Hispanic/Latino</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Persons who identify as African American or Latino/a are more likely to perceive that their fare is checked than persons who are White. Overall and on the Blue and Green Line.
Persons who identify as female are statistically more likely to perceive their fare is checked than persons who identify as male.
Trolley Fare Check by Age

There is no statistical difference in the perceived likelihood of having ones’ fare checked relative to reported age.
Voice of the Customer
Briefly tell us what changes would make the biggest difference in improving your transit experience?
Next Steps

- Presented key findings to Executive Committee – Sept 1
- Presented key findings to Security & Passenger Safety Community Advisory Group – Sept
- Possible additional focus groups/customer survey specifically about security
- Improving data collection for security
  - Staff time allocated to each line
  - Fare inspection data
- Continuing unconscious bias training
- Looking at expanding auxiliary cleaning efforts on Trolleys at key transit centers
- Exploring solutions to improve reporting process for cleanliness issues
  - Direct customer to operations/field staff
- Launching *Respect the Ride* rider etiquette campaign this fall
Questions?

Thank you!