

Customer  
Satisfaction  
Survey &  
COVID Study

Metro-North  
Survey Results

November 2021

Fall 2021  
Customers Count



# Customers Count Executive Summary

- Most lapsed\* (80%) and current customers (83%) state their employers will or already have opened their place of work, and a small percentage of businesses have left the area or are permanently closed (5%).
- Current\*\* customers' trip purpose has shifted from mainly commuting to personal business, and they are travelling less during the peak periods and more during mid-day, off-peak.
- Current\*\* customers who are riding less (69%) stated working from home (61%) and COVID concerns (36%) as the top reasons. Of all customers that will ride in the future, those that will be riding less (43%), because of work from home (65%) and COVID concerns (27%).
- During the pandemic customers have used personal vehicles (89%) rather than Metro-North for some or all of their trips.

\*Lapsed customers – Those who used an MTA service pre-COVID (before March 1, 2020) and have not since the pandemic.

\*\*Current customers – Those who are using an MTA service since the pandemic began (since March 31, 2020).

# Customers Count Executive Summary

- The Key Drivers analysis reveals the top five most important attributes to address customer expectations: on-time performance, customers wearing masks, peak service frequency, off peak service frequency, and cost of ticket.
- The most important factor for riding in the future for lapsed customers was “social distancing on trains” (88%). For current\*\* customers, top factors were “health and safety concerns” (87%) and “personal security concerns using Metro-North have been satisfied” (87%).
- Lapsed\* and current\*\* customers anticipated less monthly ticket purchases in the future, and more usage of alternative ticket types.

\*Lapsed customers – Those who used an MTA service pre-COVID (before March 1, 2020) and have not since the pandemic.

\*\*Current customers – Those who are using an MTA service since the pandemic began (since March 31, 2020).

# Research Objectives

## Determine

Determine the characteristics of current\*\* Metro-North customers and how they compare to lapsed\* customers including employment, travel patterns, communication channels, ticket types.

## Understand

Understand customer insights on COVID-19 concerns such as safety, health, and factors influencing future usage regarding riding Metro-North trains.

## Obtain

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

## Identify

Identify what strategies Metro-North can employ to increase ridership and incentivize customers to return to the railroad.

\*Lapsed customers – Those who used an MTA service pre-COVID (before March 1, 2020) and have not since the pandemic.

\*\*Current customers – Those who are using an MTA service since the pandemic began (since March 31, 2020).

# Research Methodology

- Launched an e-survey of Metro-North current\*\* & lapsed\* customers on September 20, 2021, through October 4, 2021.
- Obtained an excellent response with nearly 28,000 total responses: Approximately 6,594 responses were lapsed\* and 21,173 were current\*\* customer responses.
- Conducted extensive campaign to boost response rates throughout the region.
- Weighted data using August 2021 Ridership counts for the current customers & Pre-COVID Ridership for lapsed\* customers.
- The margin of error for the total sample, the lapsed\* customer sample, and the current\*\* customer sample is approximately  $\pm 1\%$  at the 95% confidence level.

\*Lapsed customers – Those who used an MTA service pre-COVID (before March 1, 2020) and have not since the pandemic.

\*\*Current customers – Those who are using an MTA service since the pandemic began (since March 31, 2020).

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

Employer Reopening?	Lapsed %	Current %
Yes, plans on opening work locations	49%	44%
No, but plans on reopening at another location in NY Metropolitan area	1%	1%
No, but plans on reopening outside NY Metropolitan area	1%	1%
No, does not plan on reopening/business closed	2%	2%
My business never closed/is currently open	31%	39%
Don't know	15%	13%

## Future Telecommuting Among Lapsed Customers

Work from home after directed to return to work	Fall 2020 %	Fall 2021 %
<b>Net: Yes</b>	<b>68%</b>	<b>76%</b>
4+ times per week	23%	27%
3 times per week	16%	21%
1-2 times a week	18%	21%
1-3 times a month	5%	4%
Less than once per month	2%	2%
Every other day or week, about 50% of the time	4%	1%
None of the time	10%	12%
Don't know	23%	12%

## Differences in Customer Trip Purpose Lapsed vs. Current

Trip Purpose	Lapsed Customers	Current Customers
Commuting to/from regular workplace	48%	43%
Recreation (e.g., dining/entertainment/vacation)	23%	19%
Personal business (visiting friends/family, non-medical personal)	15%	24%
For business reasons (not to regular workplace)	8%	6%
Medical or health needs	2%	4%
Commuting to/from school	2%	2%
Shopping	1%	1%
Other	2%	2%

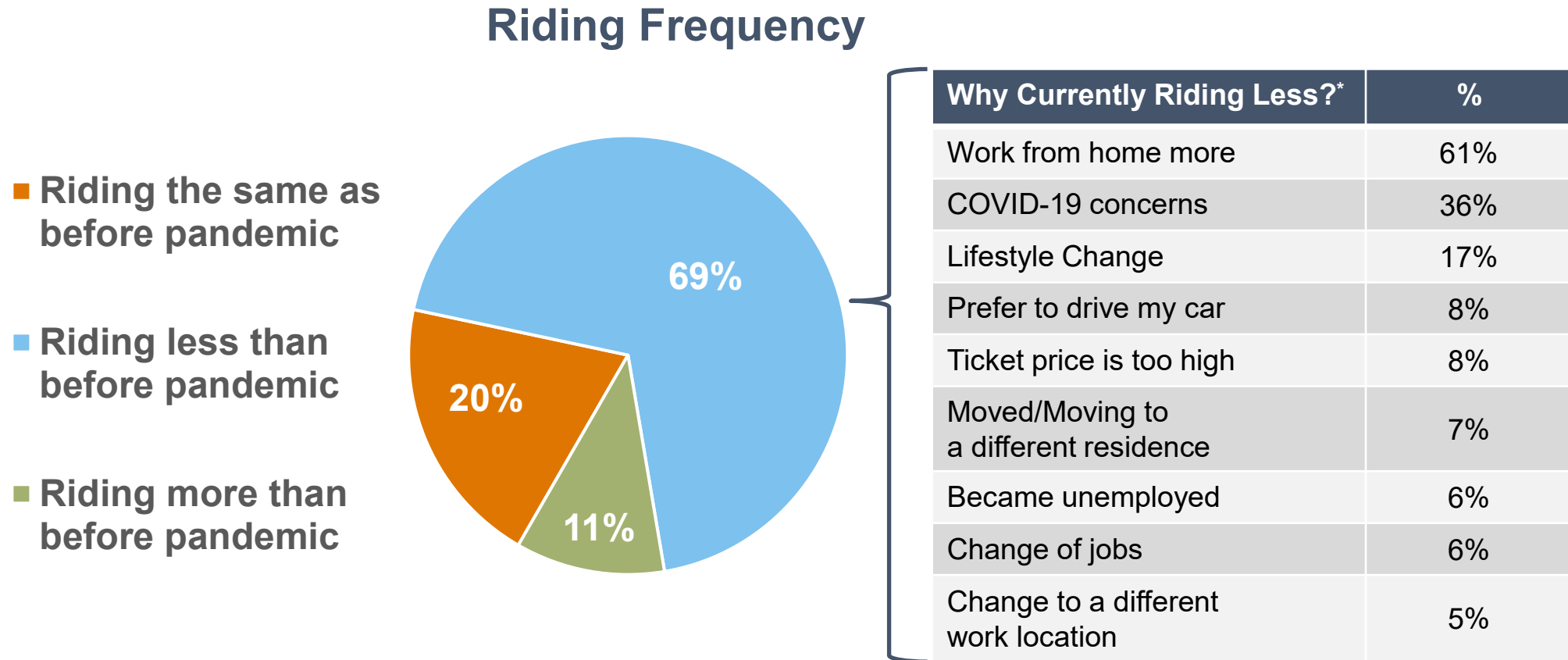


## Time of Day Usage Lapsed vs. Current

Time of day*	Lapsed Customers	Current Customers	Difference Lapsed to Current (PPT )
Monday to Friday (6AM to 9:59AM)	59%	50%	-9%
Monday to Friday (10AM to 3:29PM)	22%	26%	4%
Monday to Friday (3:30PM to 7:59PM)	55%	51%	-4%
Monday to Friday (8PM to 11:59PM)	19%	17%	-2%
Monday to Friday (Midnight to 5:59AM)	2%	5%	3%
Saturday and Sunday (Weekends)	50%	50%	0

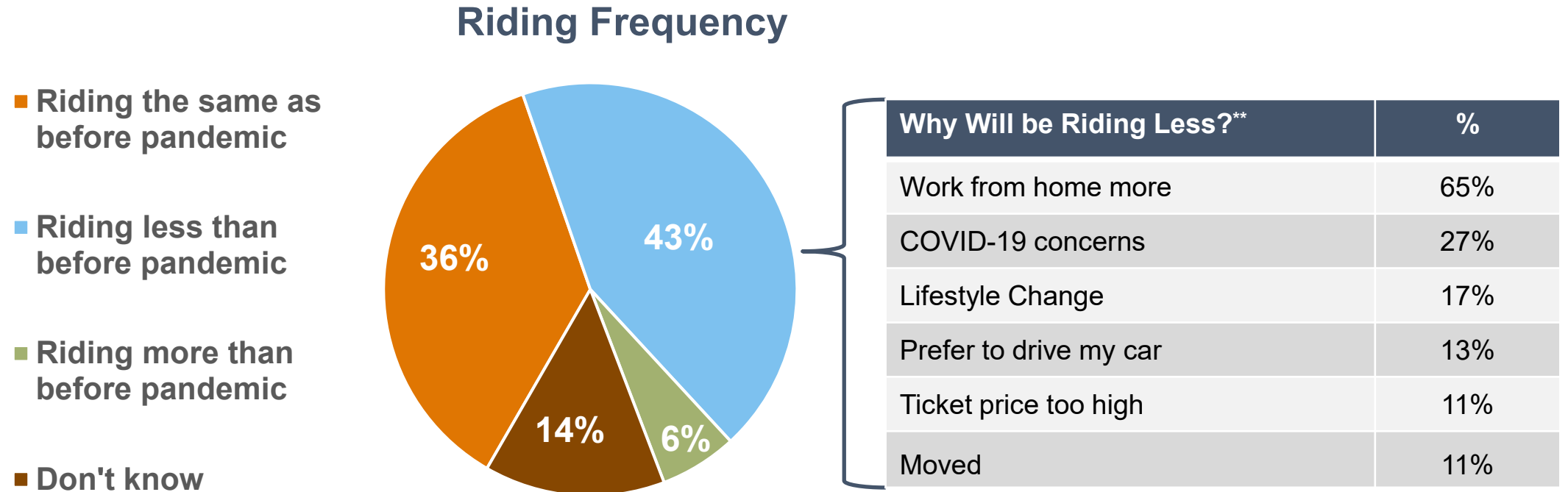
\*Multiple responses allowed so may add up to more than 100%.

# Current Customers: Reasons for Riding Less Than Before Pandemic (Among Those Stating Riding Less)



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

# Future Customers\*: Reasons for Riding Metro-North Less Than Before Pandemic

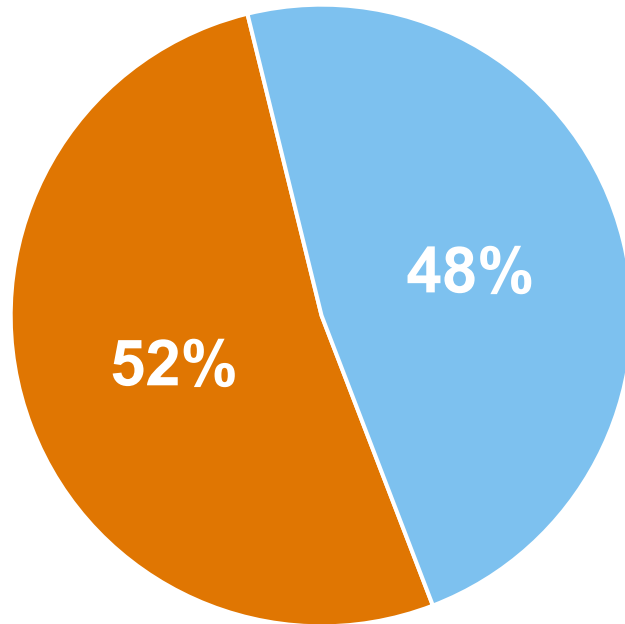


\*Future customers may include both lapsed and current customers.

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

# Alternative Modes for Trips Customers Would Have Made on Metro-North

## Alternative Transportation\*



■ No ■ Yes

Alternate Modes**	%
Personal vehicle owned/leased by you or a member of your household	89%
App-based eHail (Uber, Lyft, Via, etc.)	13%
Dropped off in a personal vehicle	9%
Car service	8%
Personal vehicle borrowed or rented from someone not in your household	6%
Walked	5%
Taxi	3%

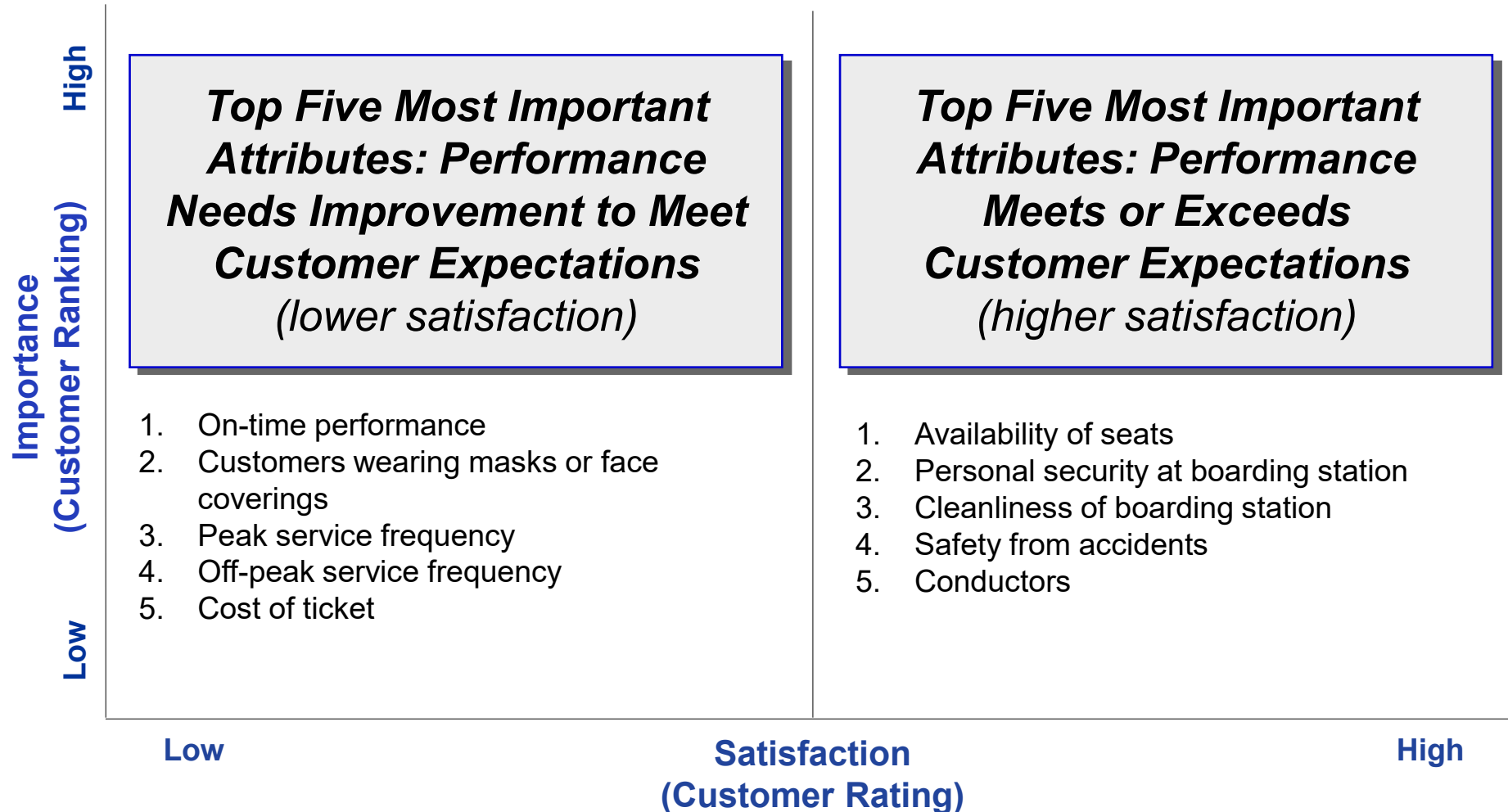
\*Includes both lapsed and current customers

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

## Customers' Future Usage of Metro-North as COVID Restrictions are Fully Lifted : Lapsed vs. Current

Future Use of Metro-North	Lapsed Customers	Current Customers
Never	4%	< 0.5%
Less than once a month	31%	15%
Less than one day a week but at least once a month	20%	24%
One or two days per week	14%	20%
Three or four days per week	10%	18%
Five days per week	5%	14%
Six or seven days per week	1%	3%
Don't know	15%	6%

# Metro-North Railroad Customer Key Drivers



# Current Customers' Service and Travel Information Sources

Primary channels*	%
Metro-North TrainTime	49%
MYmta app	44%
MTA.info website	36%
TV or radio news	7%
MTA/Metro-North pages on social media	6%
Friends and family	5%
Online news	4%
Other app	2%
Other social media	2%
E-mail	12%
Newspapers	1%
SMS/Text alert	5%
Railroad Employees	3%
Other	<.5%
I do not receive Metro-North service communications	9%

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

# Metro-North Train Time: Real-Time Information

Awareness of real-time information available on the Train Time mobile app:	Lapsed %	Current %
Train capacity	18%	22%
Train location	40%	45%
Seat availability	12%	16%

**56%**

of current customers have used the app features.

**89%**

of those who used them, found the features useful.

\* Answer options include Not Aware, Not Sure



## Factors Influencing Future Usage Lapsed vs. Current

Factors in decision to increase Metro-North usage in the future	Lapsed Customer % Important	Current Customer % Important	Difference Lapsed to Current (PPT )
Metro-North's peak service frequency	68%	75%	7%
Metro-North's off-peak service frequency	68%	81%	13%
Knowing how crowded a Metro-North train will be before boarding	80%	73%	-7%
My health and safety concerns regarding using Metro-North have been satisfied	87%	87%	0
Most people are vaccinated for COVID-19	87%	85%	-2%
My personal security concerns regarding using Metro-North have been satisfied	87%	87%	0
Social distancing on trains, so you do not sit directly next to anyone	88%	84%	-4%
My personal security concerns using the New York City Subway and Bus system have been satisfied	77%	78%	1%
Employer directing you to return to your work location	63%	72%	9%
Cost of ticket	74%	83%	9%

## Future Ticket Types Lapsed vs. Current

Ticket Type	Lapsed Customer		Current Customer	
	Past %	Future %	Current %	Future %
Monthly	36%	10%	9%	20%
Round Trip Off-Peak	23%	18%	36%	20%
Senior/Disabled (All Types)	7%	8%	8%	9%
Ten-Trip Peak	8%	16%	2%	7%
Ten-Trip Off-Peak	9%	10%	21%	13%
Round Trip Peak	9%	13%	3%	9%
One-Way Off-Peak	5%	6%	17%	9%
One-Way Peak	2%	6%	2%	4%
Weekly	1%	2%	1%	2%
CityTicket	<.5%	<.5%	0%	1%
Other	1%	1%	1%	1%
Don't know	N/A	5%	N/A	5%
I do not plan to return to using Metro-North	N/A	5%	N/A	<1%

## Key Take-aways

- Obtained an excellent response with nearly 28,000 customers completing the online survey.
- Nearly half of lapsed customers (49%) stated that their employer plans to open their work location, with an additional 31% stating its already open. Current customers had similar findings, 44% saying employer will open work location, and 39% saying it's already open.
- The percentage of lapsed customers who will continue to work from home increased from 68% in 2020 to 76% in the current study. Future telecommuting plans among lapsed customers are more definitive than in 2020 as only 12% in the current survey stated, *"Don't know."*
- Current customers reported riding less for commuting, and more for personal business (24%), than lapsed customers (15%).
- Current customers have reported riding less frequently during the AM and PM weekday peak than lapsed customers.

## Key Take-aways

- Among current customers nearly 7 in 10 stated riding less than before the pandemic, with a majority (61%) citing that they were working from home more. The pandemic is still top of mind, with over a third (36%) stating that they are riding less because of COVID concerns.
- Among all customers, nearly 4 in 10 stated they will be riding less, with similar top reasons, 65% stating they will be working from home more and 27% citing COVID concerns.
- Approximately half of all customers (lapsed and current) indicated that they have used an additional/alternative mode during the pandemic, with 89% using their personal vehicle.
- Lapsed customers were more likely to indicate “Don’t know” (15%) when asked how often they will use Metro-North in the future than current customers (6%).

# Key Take-aways

- The Key Drivers analysis reveals satisfaction and importance ratings for individual attributes:
  - Top five most important attributes of service where customer expectations had higher than average satisfaction and higher importance: availability of seats (on board), personal security at boarding station, cleanliness of boarding station, safety from accidents, and conductors.
  - Top five most important attributes of service where customer expectations had lower satisfaction and higher importance: on-time performance, customers wearing masks or face coverings, peak service frequency, off-peak service frequency, and cost of ticket.

## Key Take-aways

- The top three service and communication information sources reported by customers were: Train Time (49%), the MYmta app (44%) and the MTA.info website (36%).
- Current customers are more aware than lapsed customers of each of the features in the Train Time mobile app. Most current customers who have used the features find it useful (89%).
- The most important factors for deciding to ride Metro-North in the future for lapsed customers was “social distancing on trains.” The top factors for current customers were “health and safety concerns” and “personal security concerns using Metro-North have been satisfied.”
- Lapsed and current customers anticipate less monthly ticket purchases in the future, and more usage of alternative ticket types.