

San Francisco Bay Area Rapid Transit District

Board Workshop 2023





2022 Customer Satisfaction Survey: Results and Areas of Focus

Board Workshop

February 23, 2023



Presentation Overview

- Background
- Three key questions
- Satisfaction trends and ridership
- Attribute ratings
- Quadrant chart
- Trip characteristics and demographics
- Verbatim comments

Background

- Objectives
 - Gauge current levels of customer satisfaction
 - Obtain feedback on specific service attributes
 - Prioritize areas that need improvement
 - Obtain demographics of current riders
 - Compare to 2020 and 2018 (pre-COVID) demographics

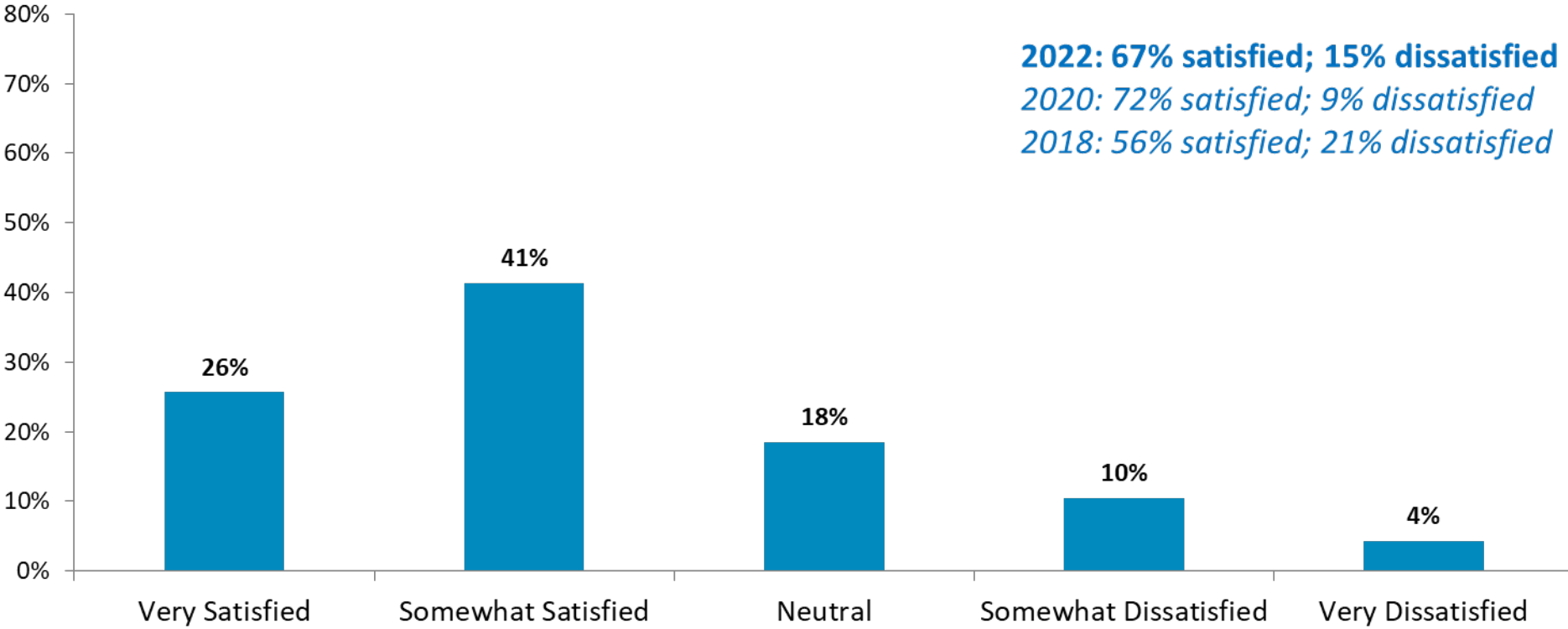
Methodology

- Questionnaires distributed onboard representative sample of runs
 - 99 weekday runs, 31 Saturday runs, and 17 Sunday runs (147 total)
- Majority collected onboard (83%)
 - Completed online (11%); mailed-in (6%)
- Survey fielded primarily in October
 - Supplemental surveying in November
- Questionnaire available in English, Spanish and Chinese
- Sample size: 3,022
 - Sample size in 2020: 2,969
- Caveat about comparisons to previous years
 - 2020 had low ridership, different rider demographics
 - 2018 had very high ridership

Satisfaction

- 67% are very or somewhat satisfied with BART, while 15% are dissatisfied

Overall, how satisfied are you with the services provided by BART?



2022: 67% satisfied; 15% dissatisfied
2020: 72% satisfied; 9% dissatisfied
2018: 56% satisfied; 21% dissatisfied

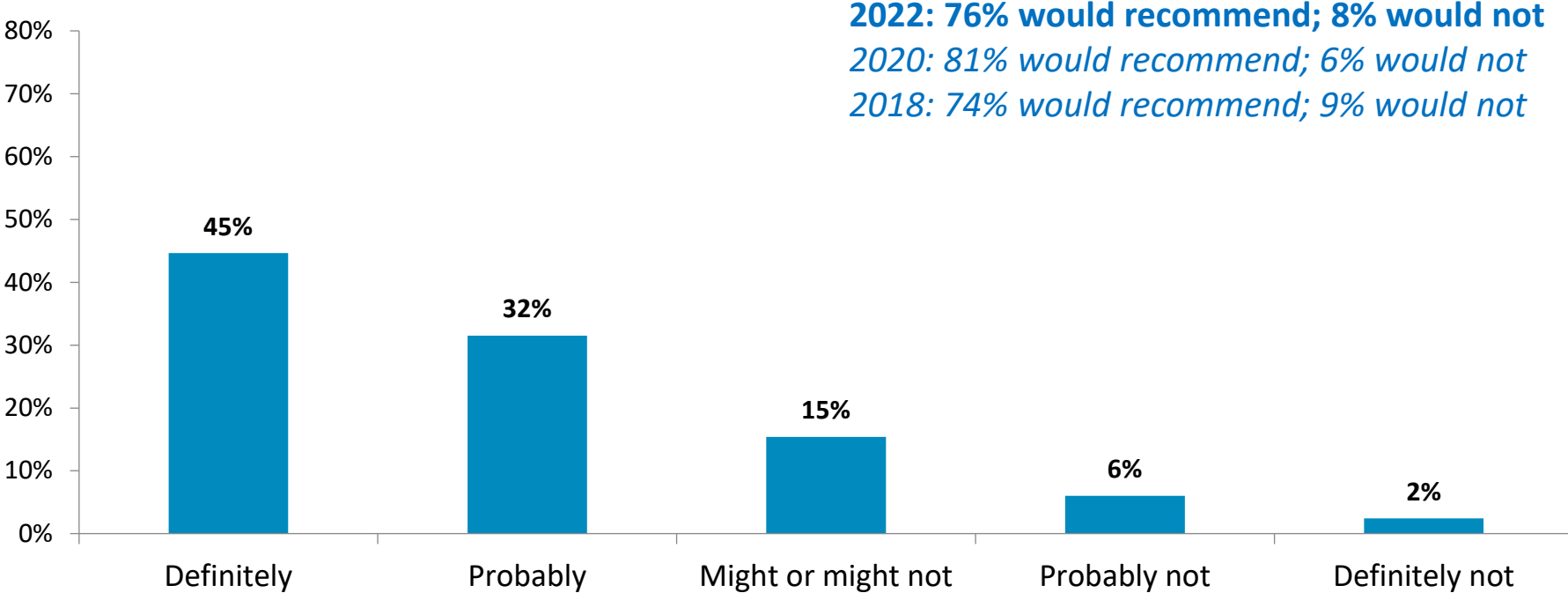
n: 3,012
Note that the Bottom 2 Box score of 15% is impacted by rounding.



Recommend to a Friend

- 76% would recommend BART, while 8% would not

Would you recommend BART to a friend or out-of-town guest?



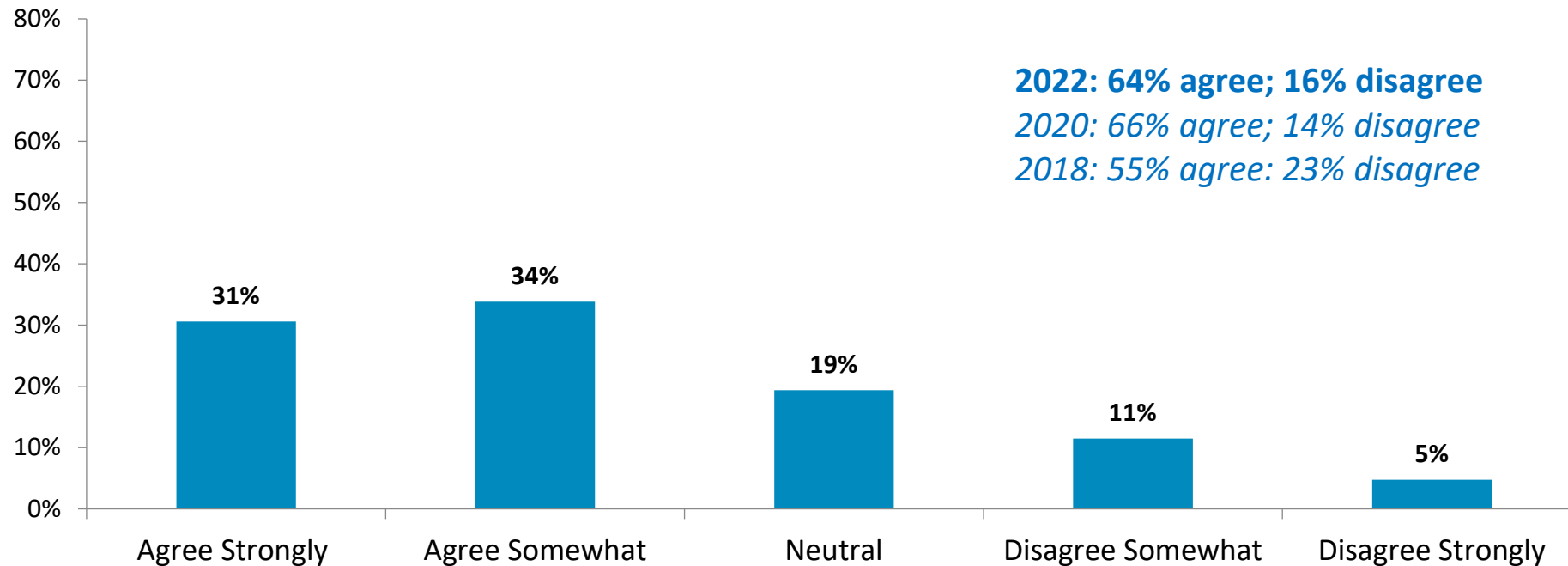
n: 3,013
Note that the Top 2 Box score of 76% is impacted by rounding.



Value for the Money

- 64% agree that BART is a good value for the money

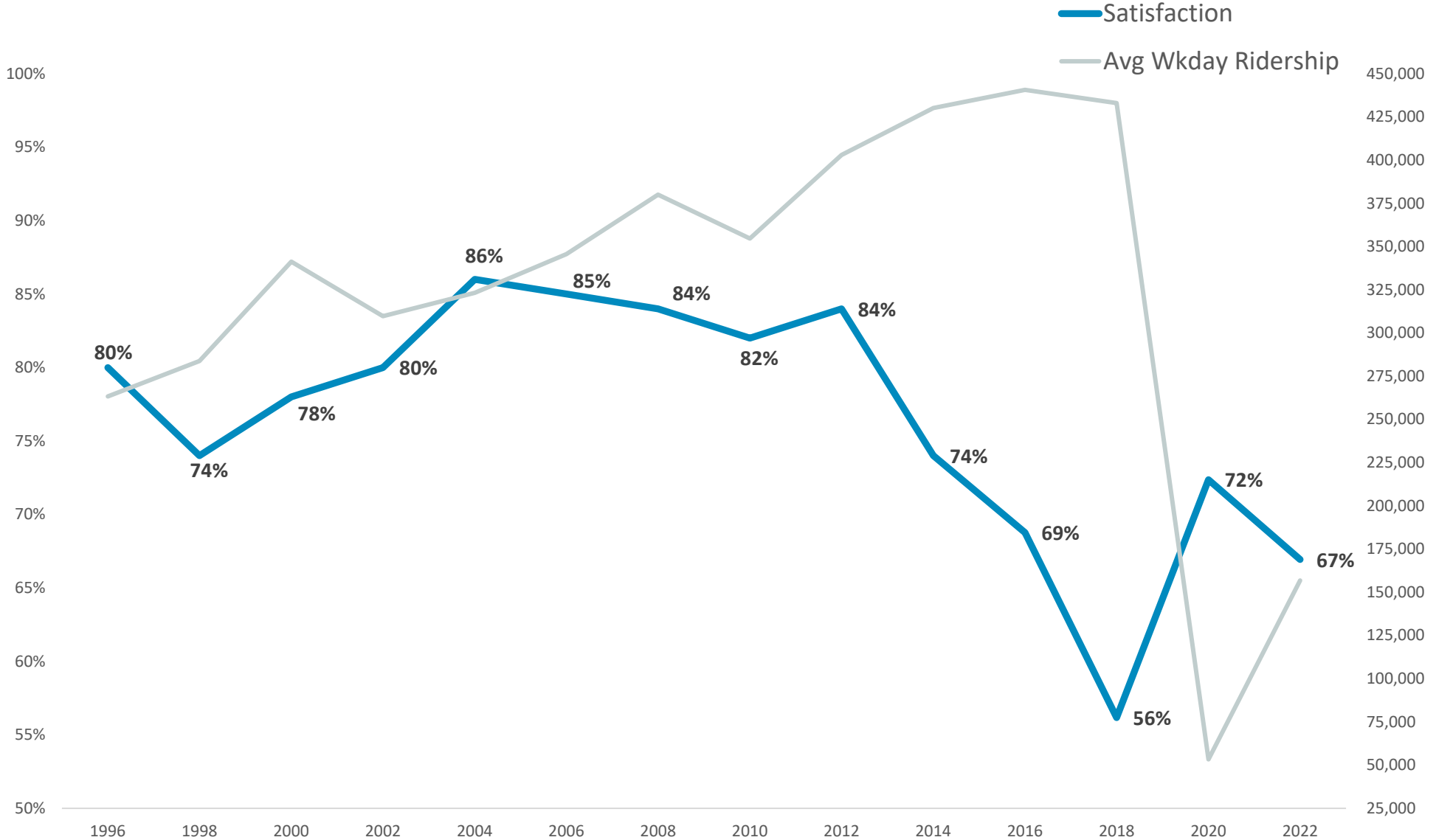
*To what extent do you agree with the following statement:
"BART is a good value for the money."*



n: 2,984

Note that the Top 2 Box score of 64% is impacted by rounding.

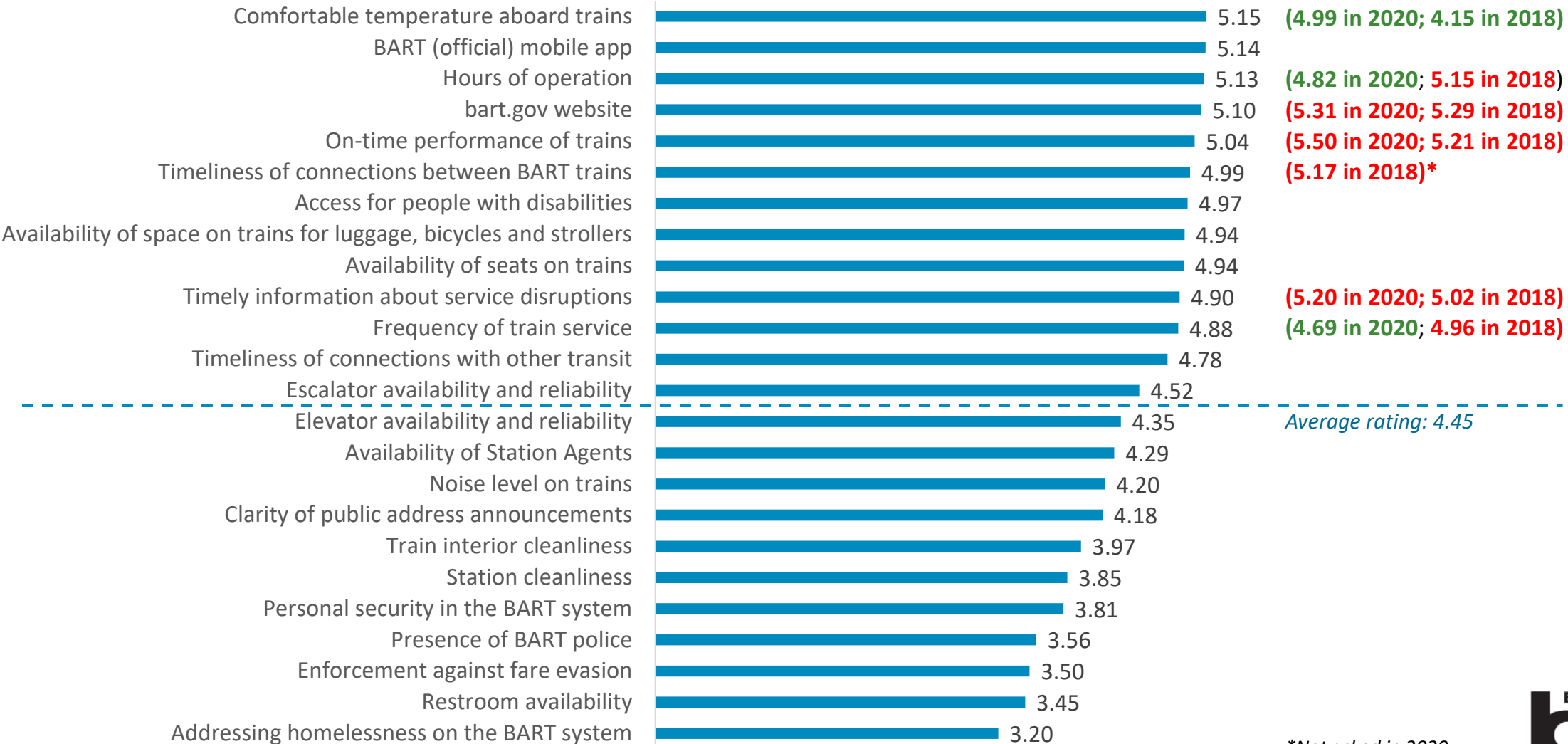
Satisfaction Trends and Ridership



Service Attribute Ratings

Please help BART improve service by rating each of the following attributes. "7" (excellent) is the highest rating, and "1" (poor) is the lowest rating.

Selected prior ratings

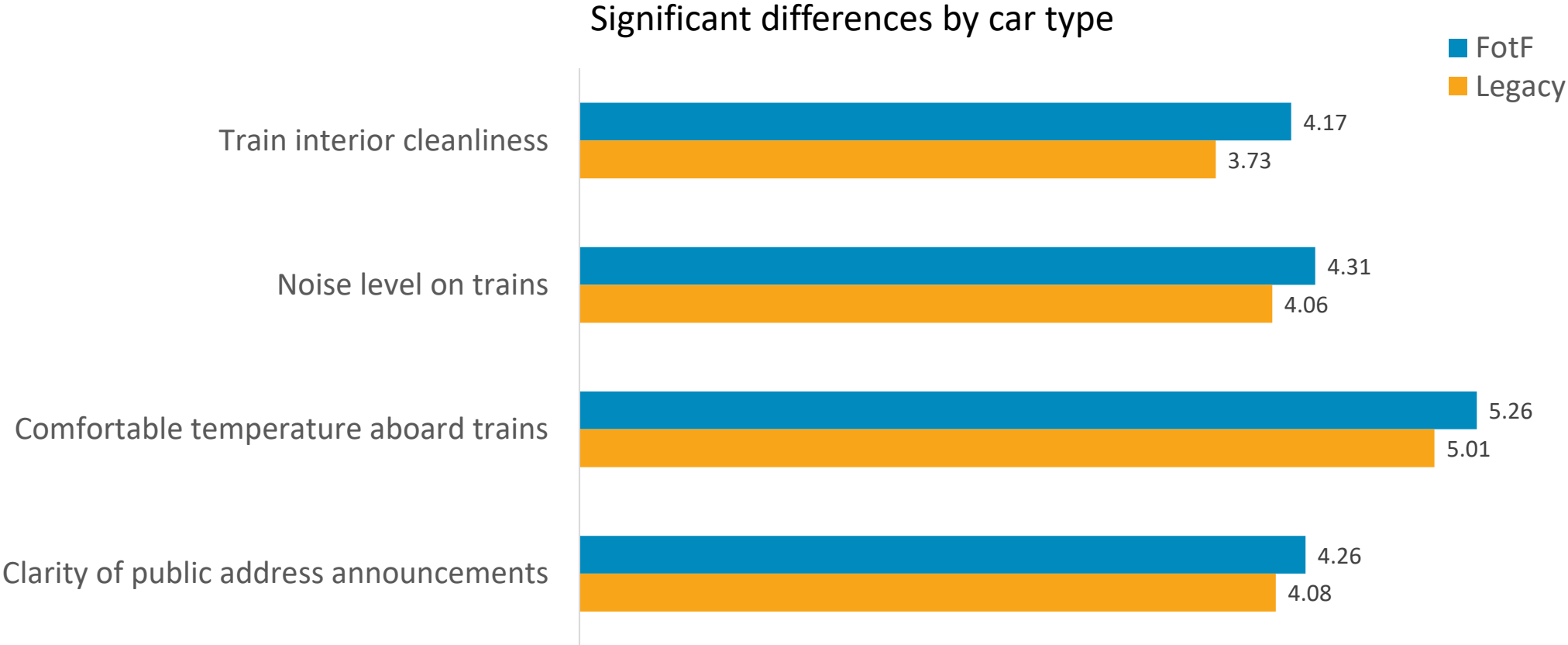


*Not asked in 2020



Service Attribute Ratings by Car Type

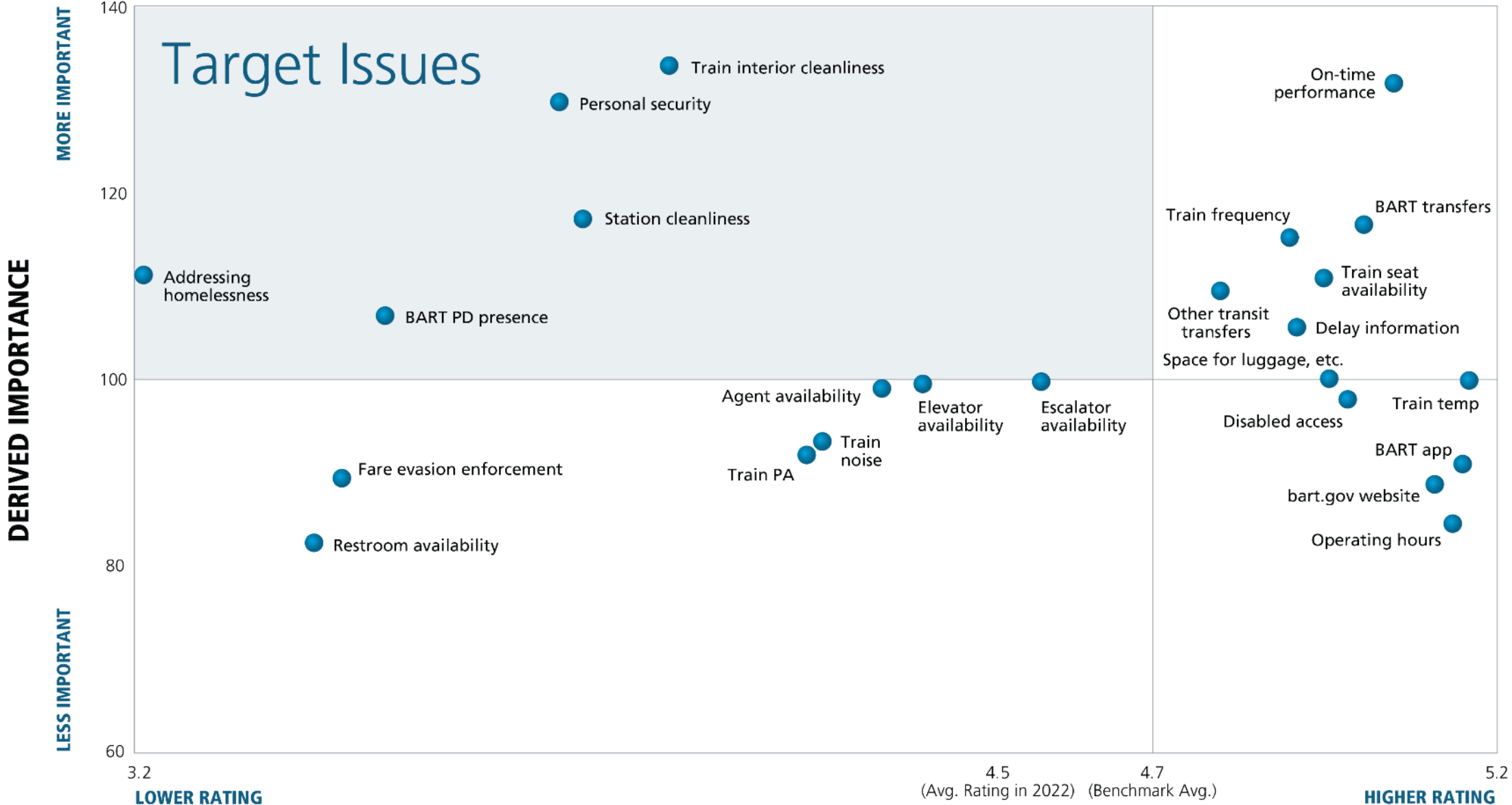
- Customers surveyed onboard Fleet of the Future (FotF) cars rated four train-related attributes significantly higher than customers onboard Legacy cars*



*Station cleanliness was also rated higher by those surveyed on Fleet of the Future cars



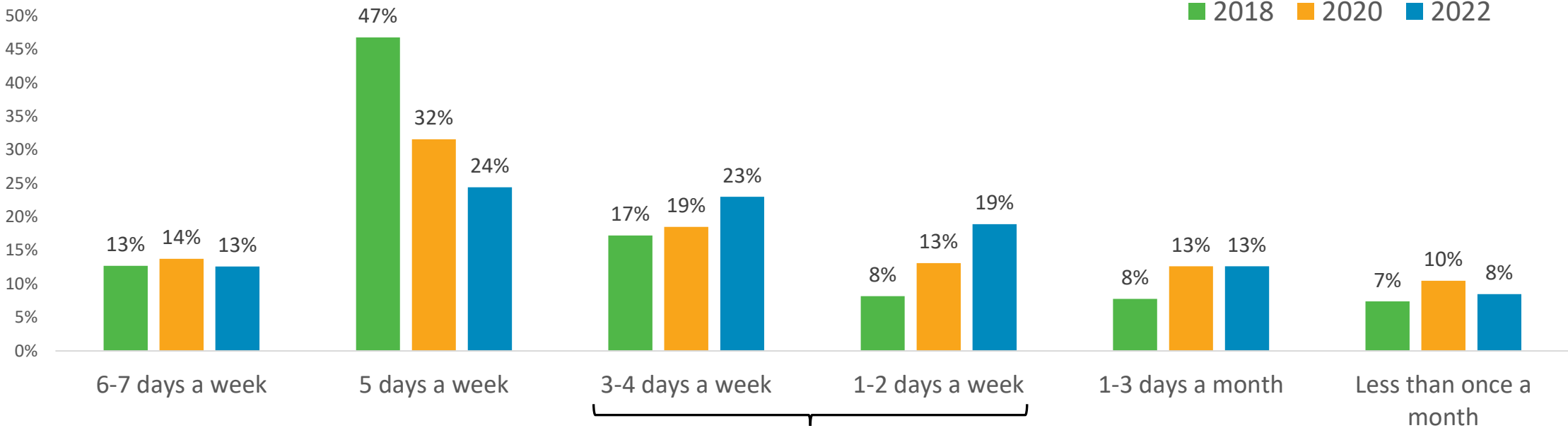
2022 Quadrant Chart



Frequency of BART Ridership

- There has been a dramatic decline in five-day-per-week riders
- Those riding one to four days per week now comprise 42%

How often do you currently ride BART?

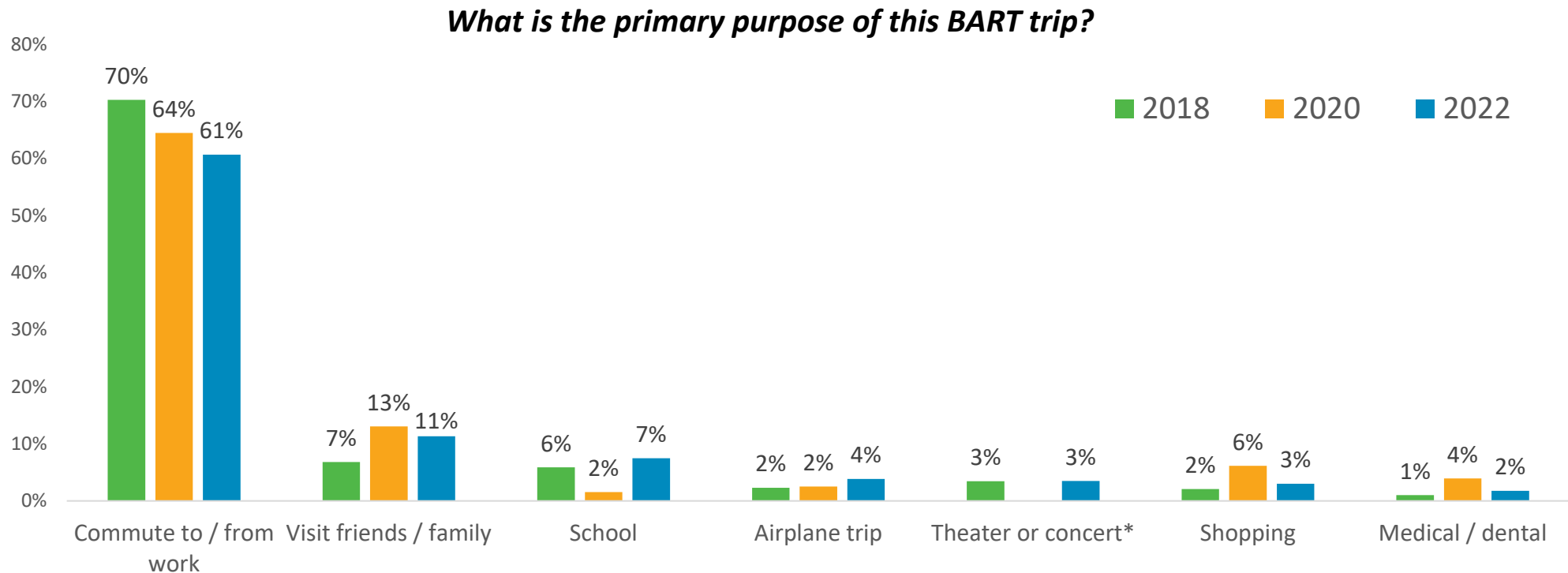


Riding 1 – 4 days/week in 2018: 25%
Riding 1 – 4 days/week in 2020: 32%
Riding 1 – 4 days/week in 2022: 42%



Primary Trip Purpose

- Compared to 2018, commute trips declined 10 percentage points (ppts), while visiting friends/family trips increased five ppts

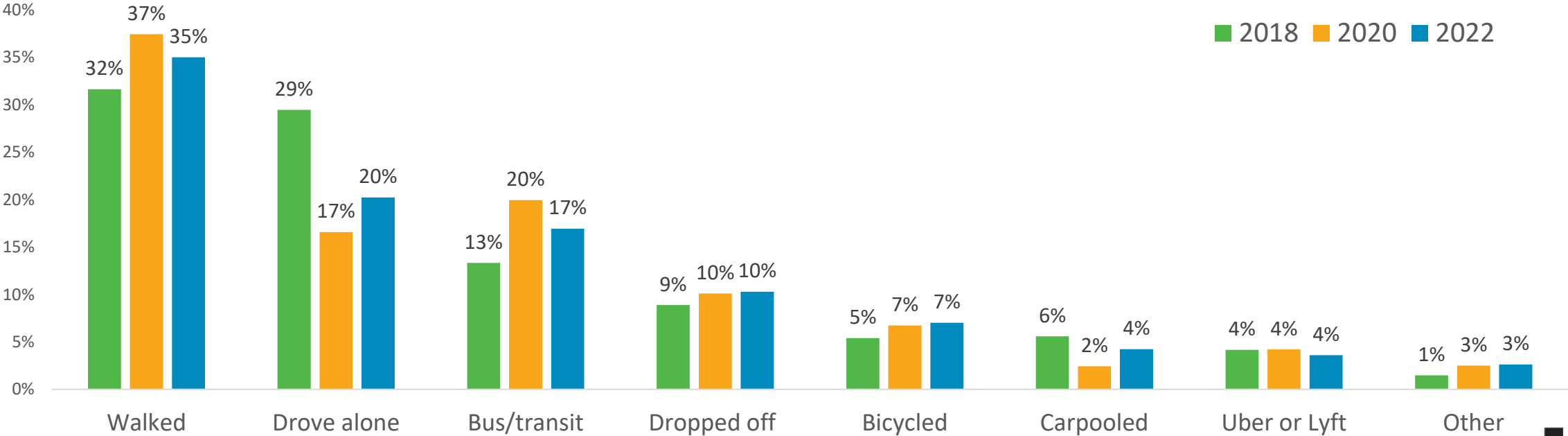


**Due to limited events taking place during the 2020 survey, "Theater or concert" was not listed on that year's survey
Note the 10 ppt decline in commute trips and the 5 ppt increase in visiting family/friends trips are impacted by rounding.
Other trip purposes not shown on this chart accounted for 8% of trips in all three years.*

Station Access Mode

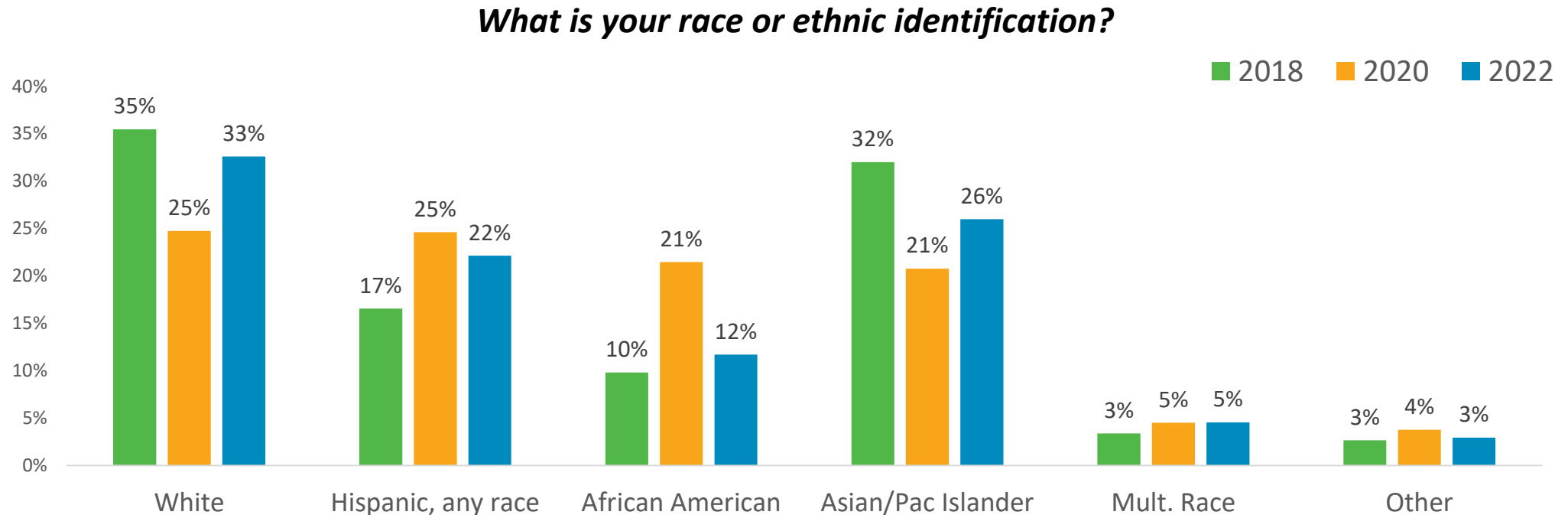
- Compared to 2018, driving alone dropped nine pts; taking transit, walking, and bicycling increased (four, three, and two pts, respectively)
- Compared to 2020, driving alone and carpooling increased, while walking and taking transit decreased

How did you travel between home and BART today?



Demographics: Race

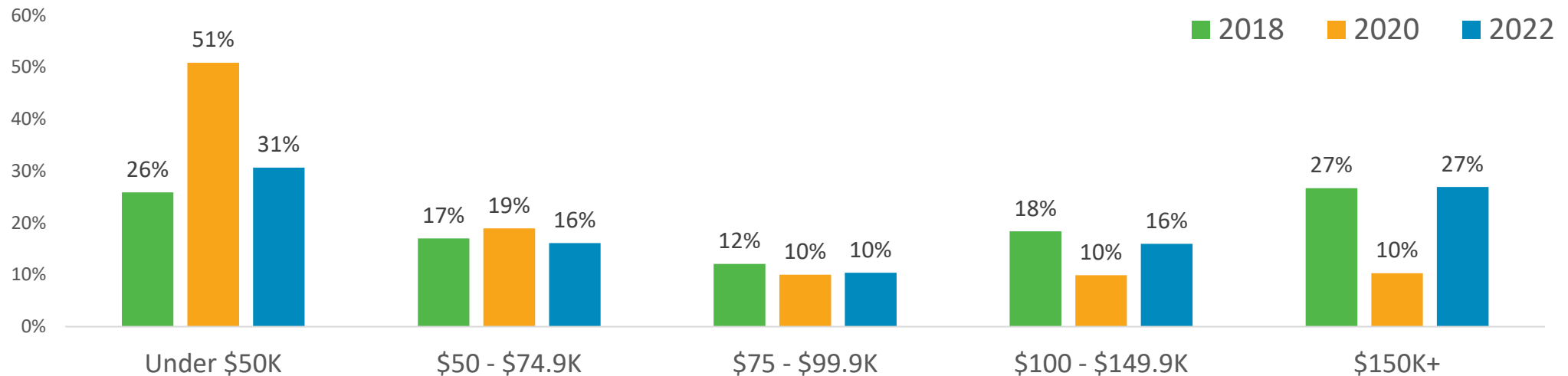
- Compared to 2018, the percentage of Hispanic riders has increased while the percentage of Asian riders has decreased
- Note that in 2020 there were dramatic shifts in racial demographics



Demographics: Household Income

- Though riders' income levels are higher than in 2020, they are skewing lower compared to 2018

*What is your total annual household income before taxes?**



Low-income estimates, taking both household income and household size into account:**

2018: 20% low-income

2020: 41% low-income

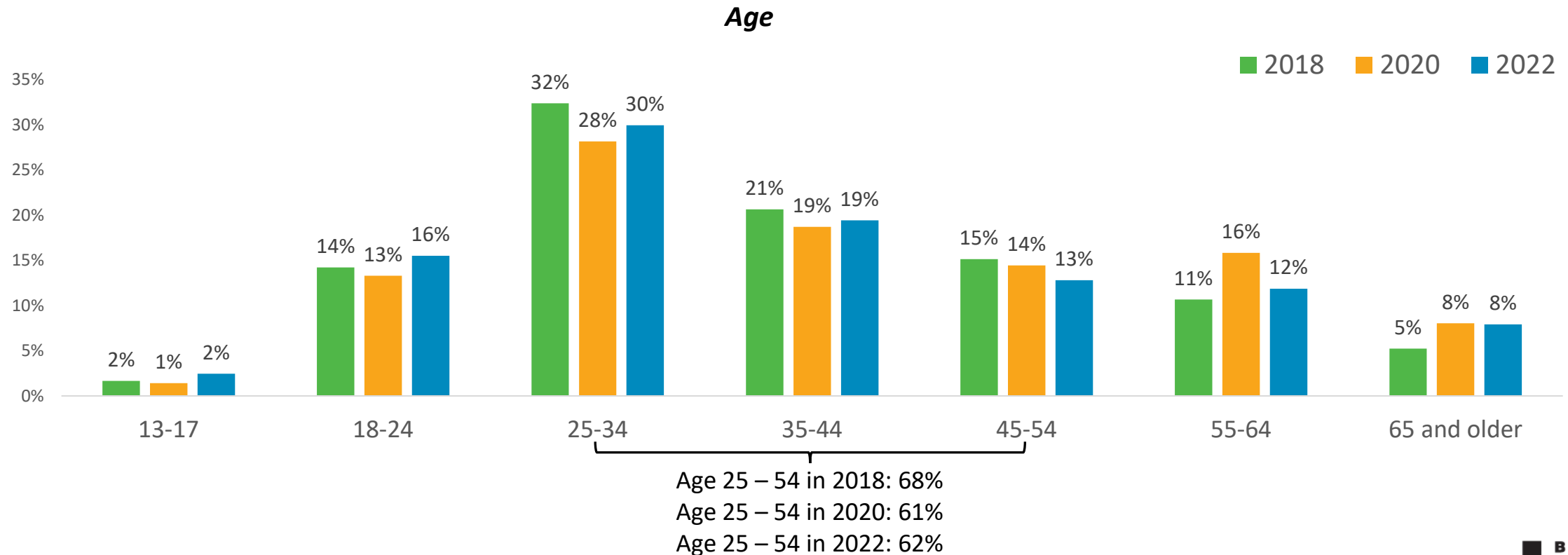
2022: 29% low-income

** Income comparisons in chart have not been adjusted for inflation.*

***These estimates approximate 200% of the Dept. of HHS's poverty guidelines, which are adjusted annually. For reference, a household of four with annual household income under \$55,500 would be considered low-income using the guidelines. The corresponding survey category is under \$60,000.*

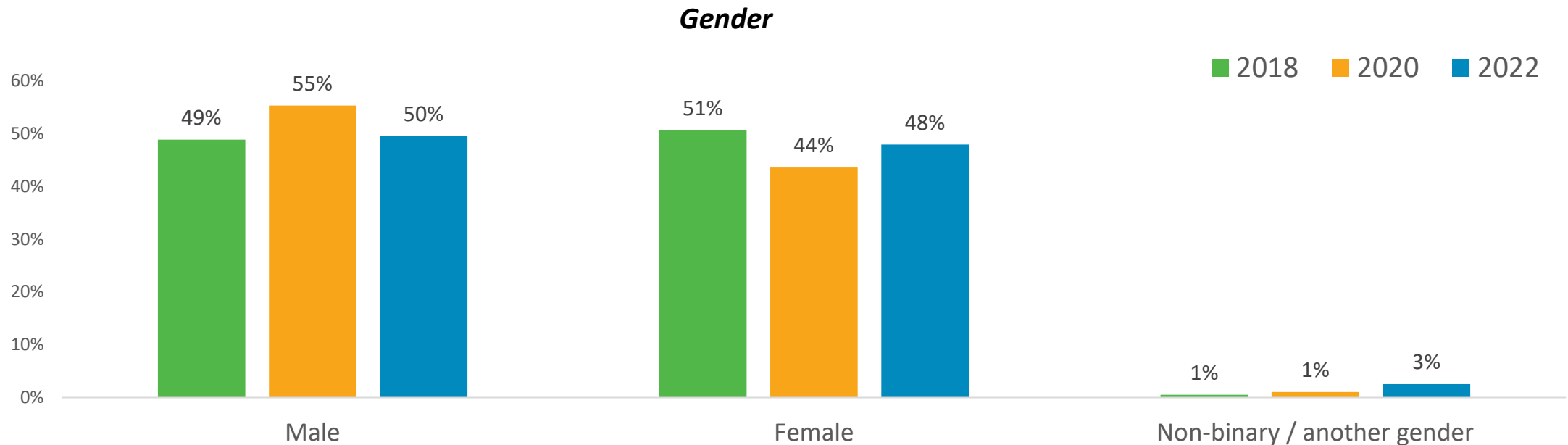
Demographics: Age

- The percentage of riders in the 25 to 54 age group has dropped since 2018, from 68% in 2018 to 62% in 2022



Demographics: Gender

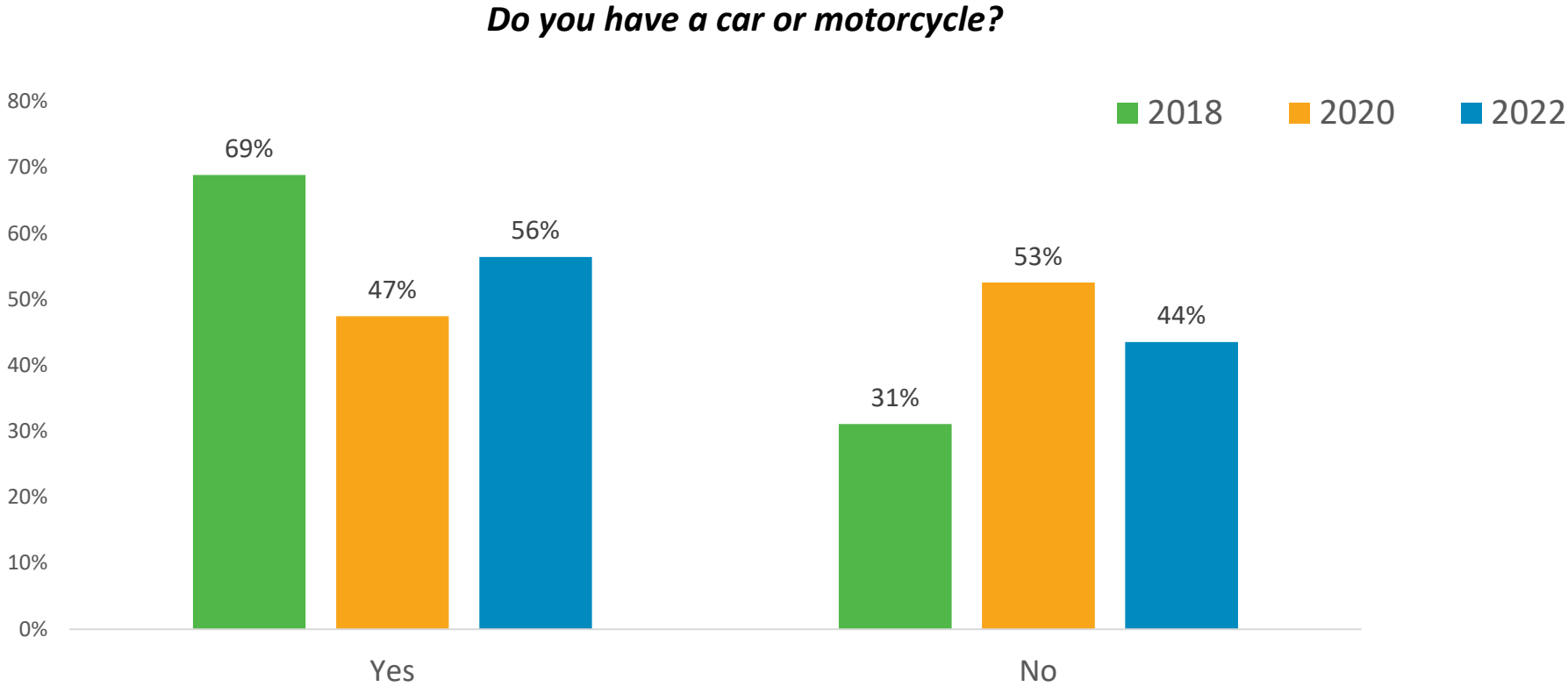
- The gender split is fairly even in 2022 in contrast to the male skew in 2020
- Compared to 2018, the percentage of female riders has declined slightly and the percentage of non-binary/another gender riders has increased*



**Note that the gender response options were modified in 2022, which may account for some of the increase in the non-binary/another gender responses.*

Demographics: Vehicle Ownership

- While the percentage of riders with vehicles has increased since 2020, it has decreased substantially from 2018



Verbatim Comments

Related to Target Issues



Verbatim Comments: Cleanliness

- *Some stations and trains are better kept than others. But overall much cleaner than pre-pandemic.*
- *Cleanliness, homelessness, security are the major problems. Train breakdowns & delays are rising.*
- *San Francisco stations & stairwells are filthy & smell of urine*
- *Civic Center is terrible, do not recommend people take BART to visit me. Smells bad and lots of unwell people.*
- *If the trains felt cleaner, I would ride BART 10x more*
- *Some older trains and traveling later at night are a total mess w/ people dropping trash and smoking*

Verbatim Comments: Personal Security / Crime / Police

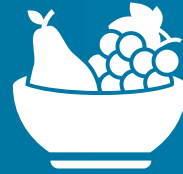
- *Not feeling safe is the #1 reason I don't usually take BART.*
- *BART is too scary for many people to use. Sad but true.*
- *Would love for BART to feel safer, esp. for women, esp. @ night w/ low train frequency. I'd take it more often if so.*
- *Rider for 25 years. Its pretty bad. Not safe. Don't feel comfortable with wife and teen daughter riding alone. No one cares about fare evasion. Way too many people in the system who shouldn't be.*
- *BART feels unsafe. Almost every visit there is someone who acts threatening or is smoking or on drugs.*
- *As I fill out this survey, I'm sitting next to a piece of aluminum foil that was used to smoke heroin.*
- *BART is essential and I would feel better, safer if police were visible regularly.*
- *Need more police in evenings especially after 7:30 pm*
- *Increase security personnel patrolling the trains will probably help address people shouting in trains, thank you.*
- *Mentally ill people are constantly in the stations disrupting things, smoking cigarettes in the station and harassing people. Same goes for the trains. Out of everything that could possibly be improved on BART, safety and enforcement is the #1 thing for me.*

Verbatim Comments: Addressing homelessness

- *The admittedly difficult issue of homeless and mentally ill passenger disruption is out of hand and worsening. Many riders feel uncomfortable at best and threatened at worst. It would seem that ridership, and therefore revenue, are negatively impacted.*
- *I take BART for convenience, but I wouldn't otherwise. Trains are often disgusting homeless shelters and dangerous.*
- *I've seen some improvement in homeless management on the trains, but it is still unpleasant to bring my family to the SF stations. Waiting 20+ minutes with folks wandering the platform with dogs and bags of stuff, especially when an odor follows them. It's frustrating to watch them smoke/urinate/shout randomly and watch my girls wince or recoil -- I know it's not BART providing poor support for them, but it means every trip I have to re-convince my family that it's safe or worth the hassle. The combination of extremely long time between trains and the presence of people who make you uncomfortable is a very bad combination for transit usage.*
- *Security, cleanliness are major concerns. There should be case managers or some type of ambassadors to address the concerns of the homeless population that utilizes the trains for shelter.*

Discussion

Afternoon Break



- **Agenda Topics**

- Look Ahead
- Regional Context and Financial Outlook
- Financial Stability: Near- and Long-term Strategy
- Working Lunch: Customer Satisfaction Survey
- **Improving Customer Experience**
- Workshop Wrap Up

Time to Next Presentation

15:00

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 Breaktime for PowerPoint by Flow Simulation Ltd.

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