



2018 Customer Satisfaction Study

January 24, 2019



2018 Customer Satisfaction Study Background



1. Objectives

- Track trends in customer satisfaction
- Prioritize areas for improvement

2. Context for the 2018 update

- Impact of Bay Area homeless crisis on BART
- Media coverage and rider concerns about personal security on BART in period preceding survey
- Continue to see high levels of crowding on peak period trains

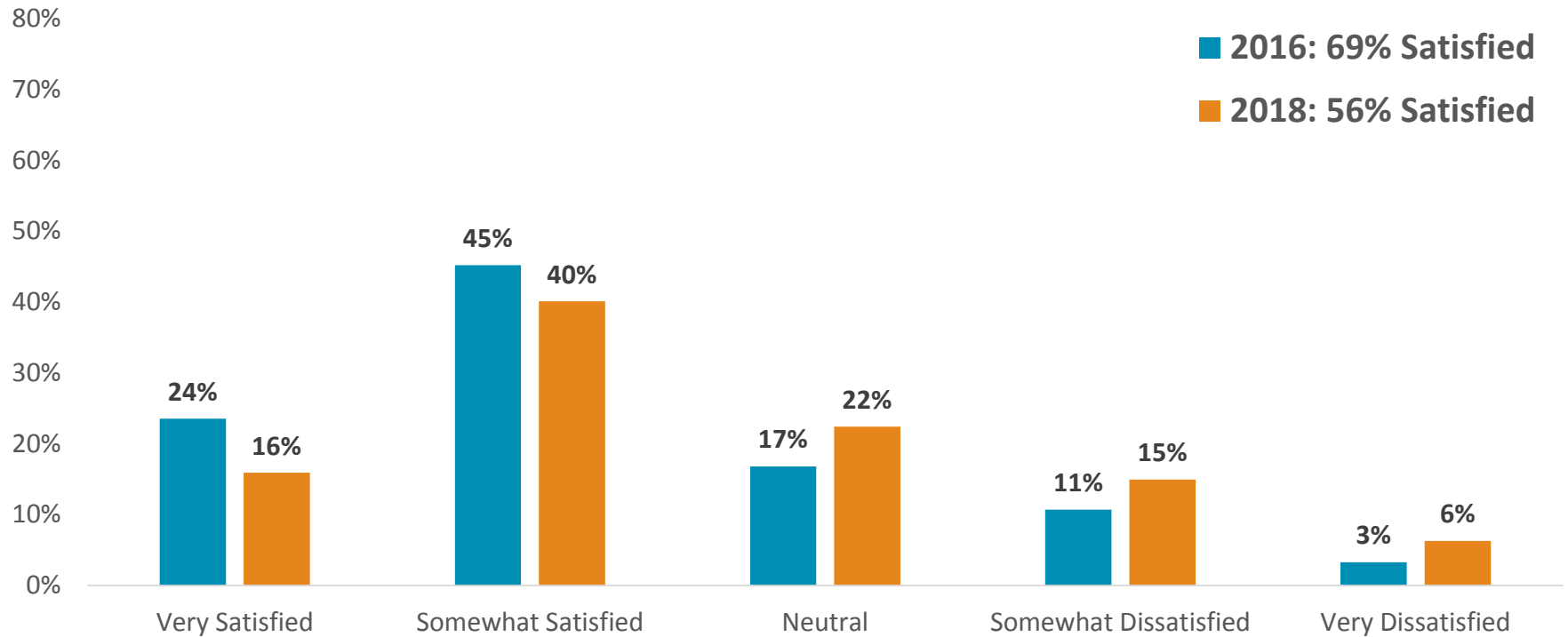
3. Methodology

- Survey fielded Sep 11 - Oct 21
- Random sampling
- n = 5,292
- Weighting of data

Satisfaction



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

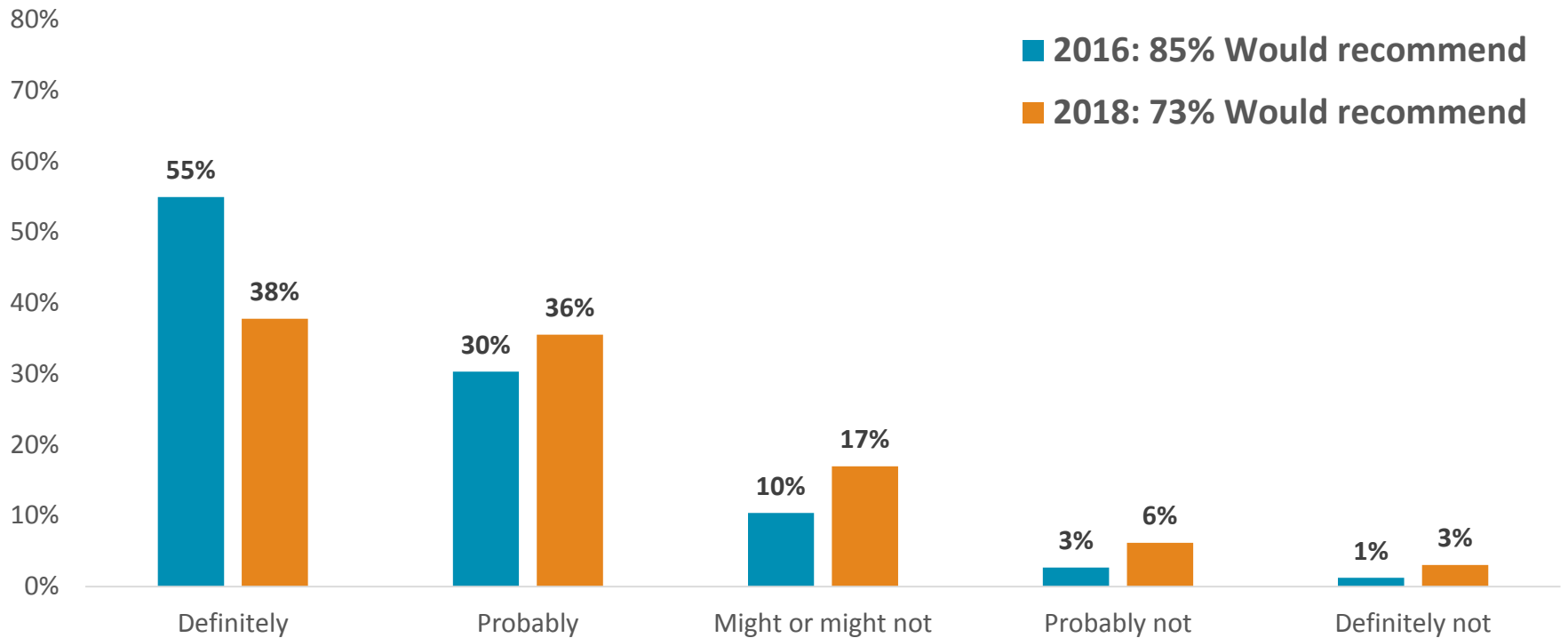


Percentages may not total 100% due to rounding.

Recommend to a Friend



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

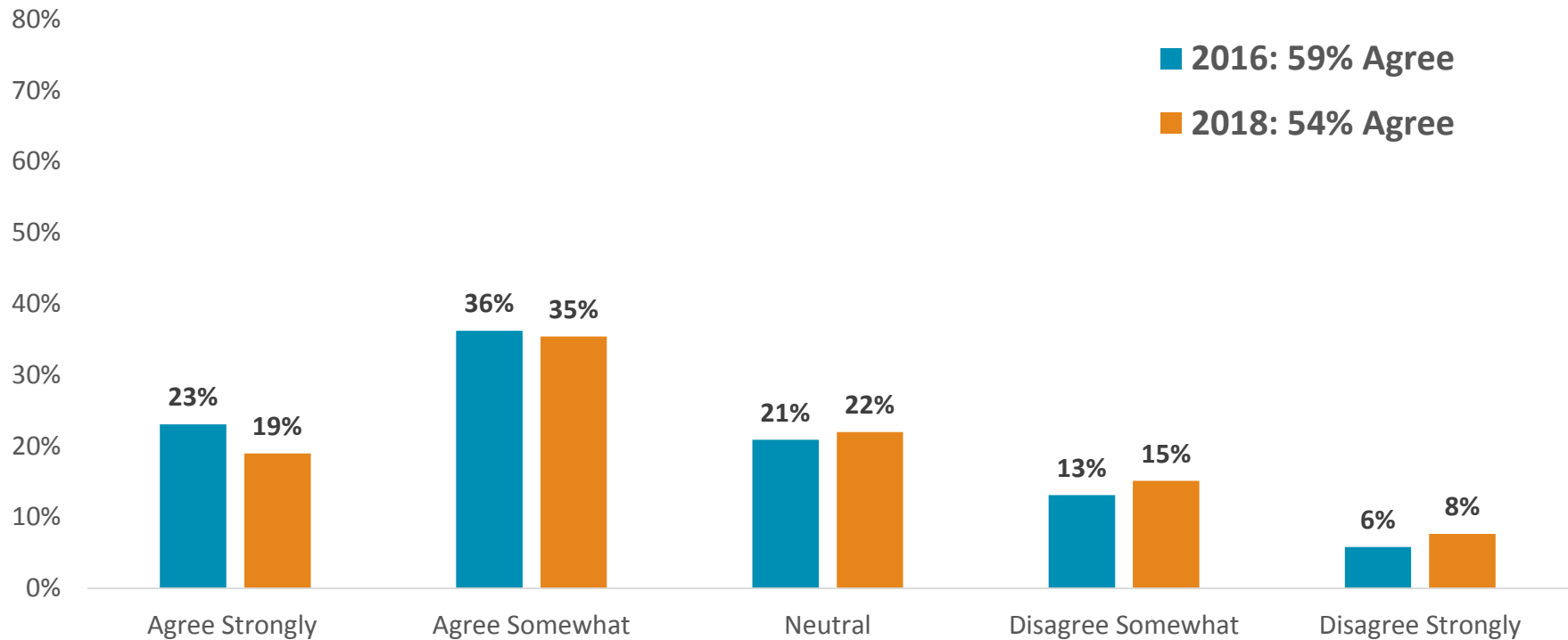


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Value for the Money

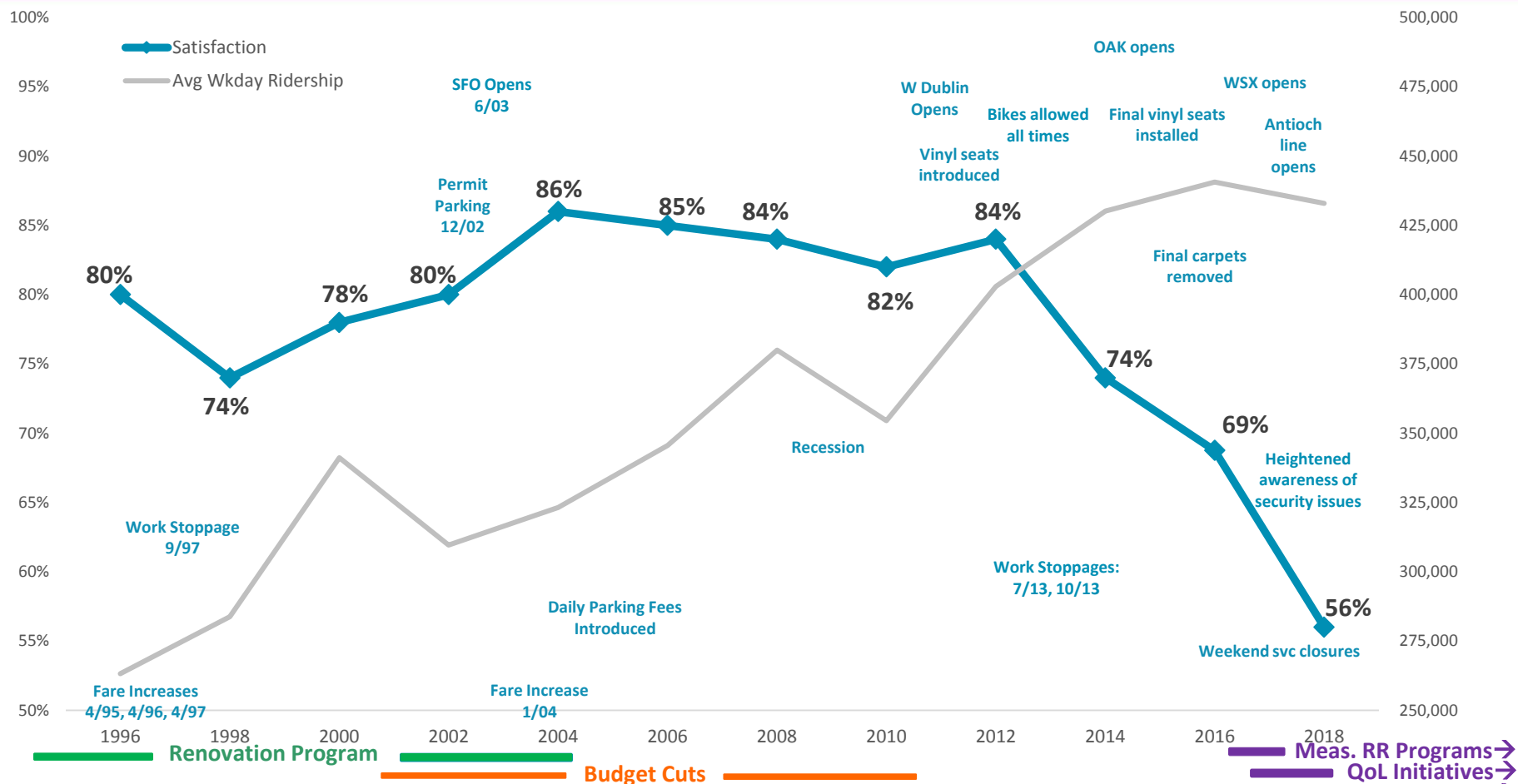


“BART is a good value for the money.”



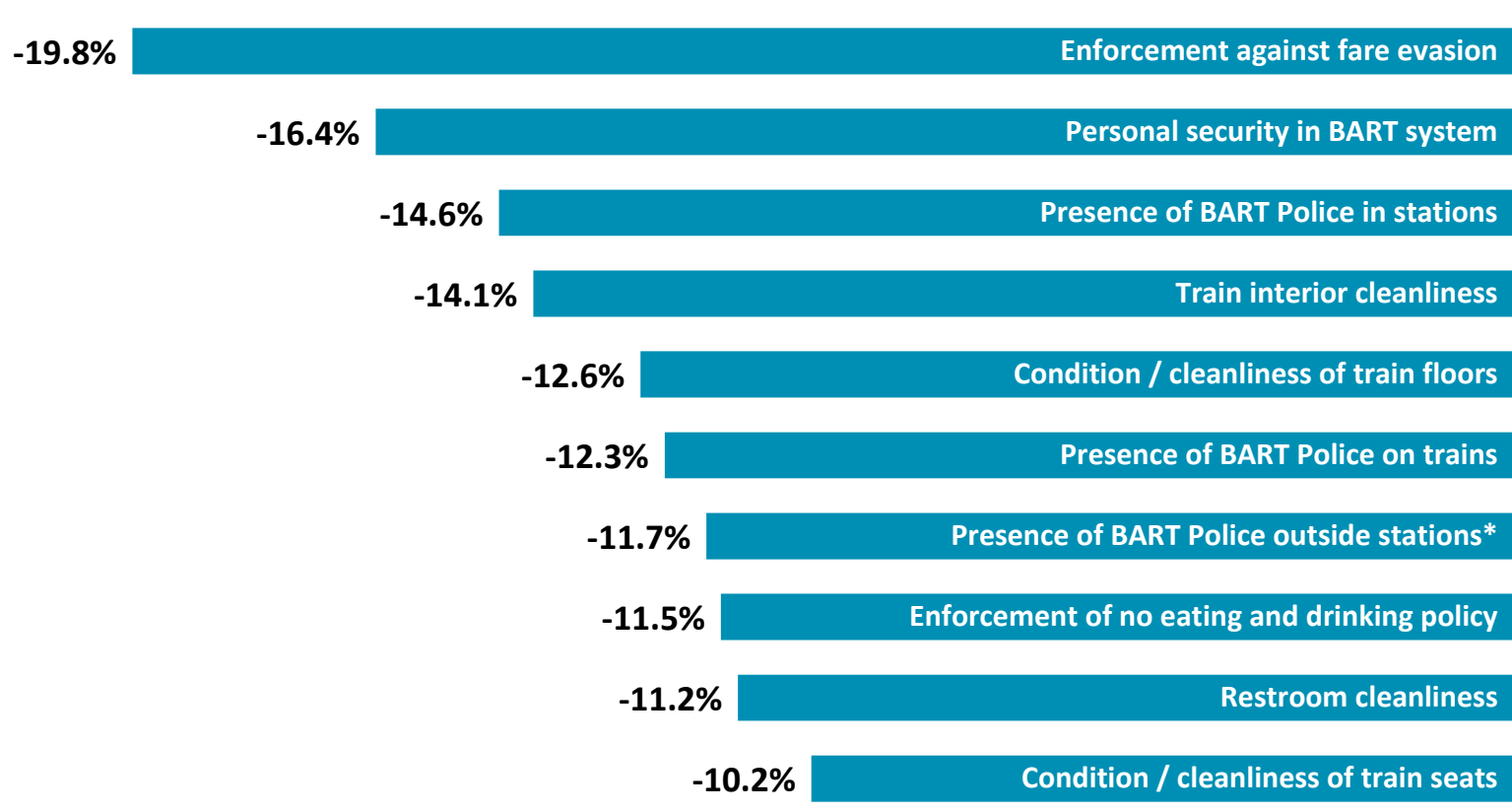
Percentages may not total 100% due to rounding.

Satisfaction Trends and Ridership



Largest Service Rating Declines

- Declines across most attributes. Largest declines:



*Text changed from presence in parking lots

Selected Verbatims



*On-train safety has deteriorated seriously in the past 4 years. **Panhandlers** now roam the trains shamelessly. My friends and family are abandoning BART in droves.*

*The issue of **mentally ill** using BART in increasing numbers has to be addressed. **I am often afraid.***

***More police presence** would make the trip more comfortable for **night travelers**, especially females.*

*The #1 problem with BART right now is the sheer volume of homeless people / mentally ill on BART. My wife and co-workers often **do not feel safe or clean on BART**. Please find a way to fix this. Happy to pay more for this.*

*I ride BART late (11:30pm - 2am) and often am **concerned for my safety** due to **agitated, mentally ill, or aggressive people**. I ride BART less than I would because of the presence of unsafe conditions.*

*I'd like to see BART be **safe for its passengers**, especially women of color....*

*Too many **homeless sleeping in cars**. Complete impunity to **fare evasion**.*

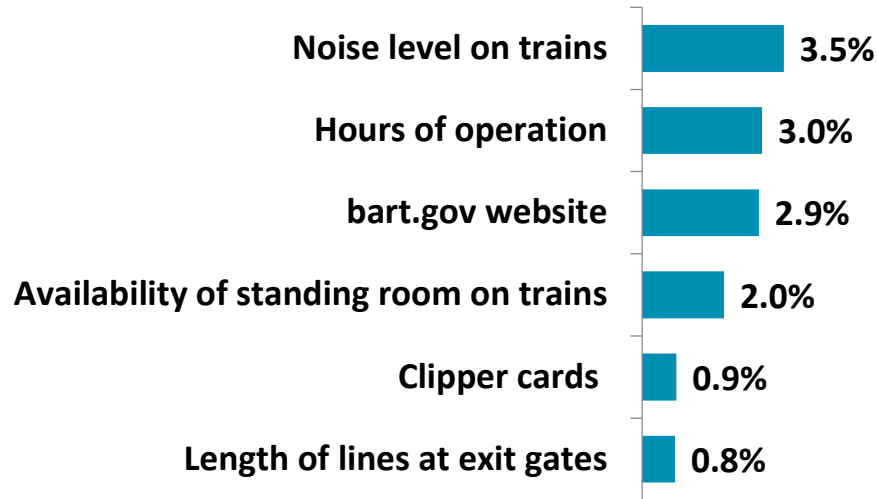
***Too many homeless people on BART asking for money**. I've found needles, urine, fecal matter on seats. Homeless harassing riders. I feel unsafe all the time. We need police present on train.*

*The BART trains are generally **very dirty**, and they **smell of urine**. The floors are filthy and often times the seats are as well.*

*The **increased police presence** has improved the overall shocking quality of BART as of late. Please continue to increase security and enforce regulations!*

Service Rating Improvements

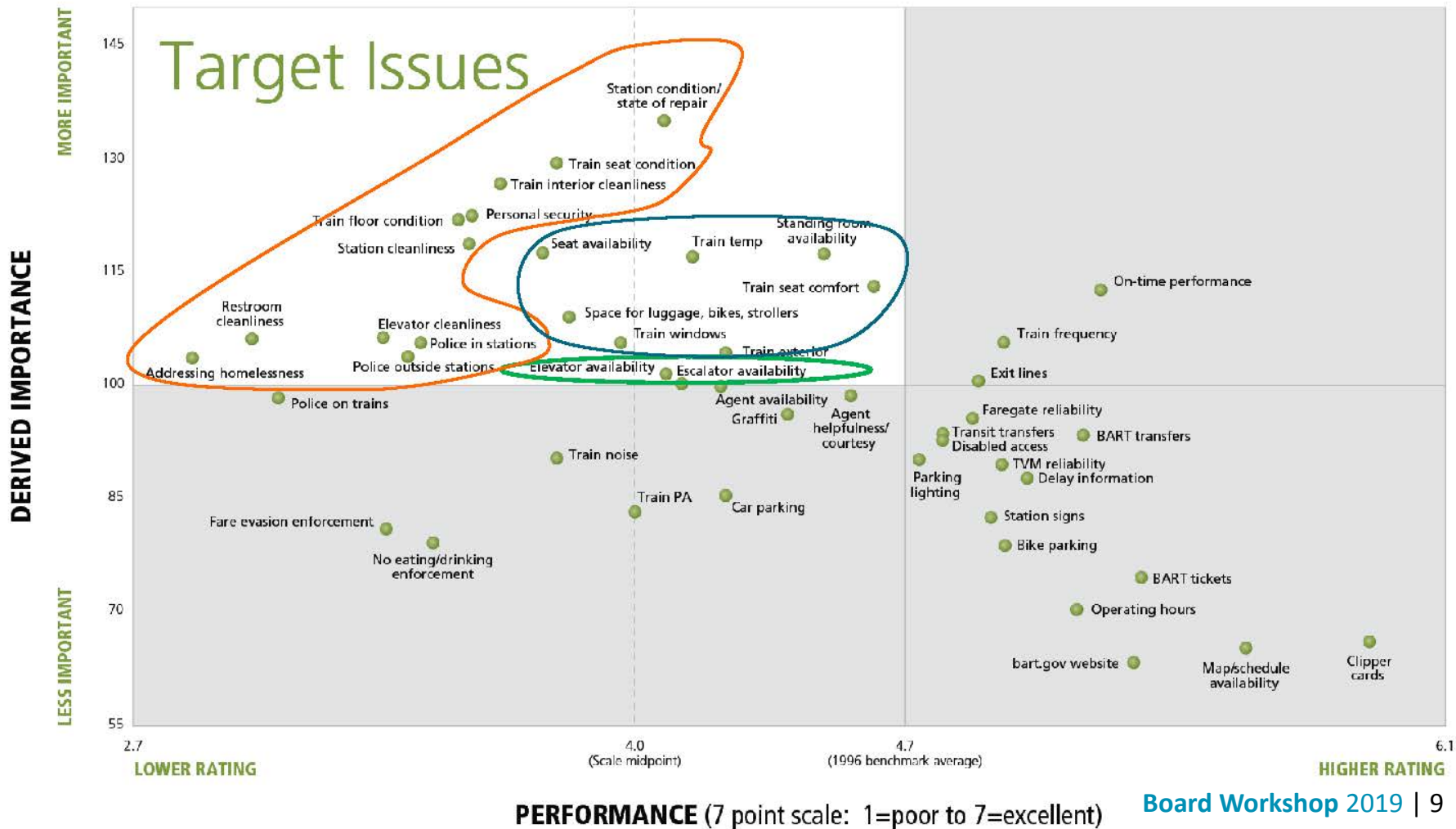
- Ratings of the following attributes increased:





2018 BART Customer Satisfaction Survey

Quadrant Chart

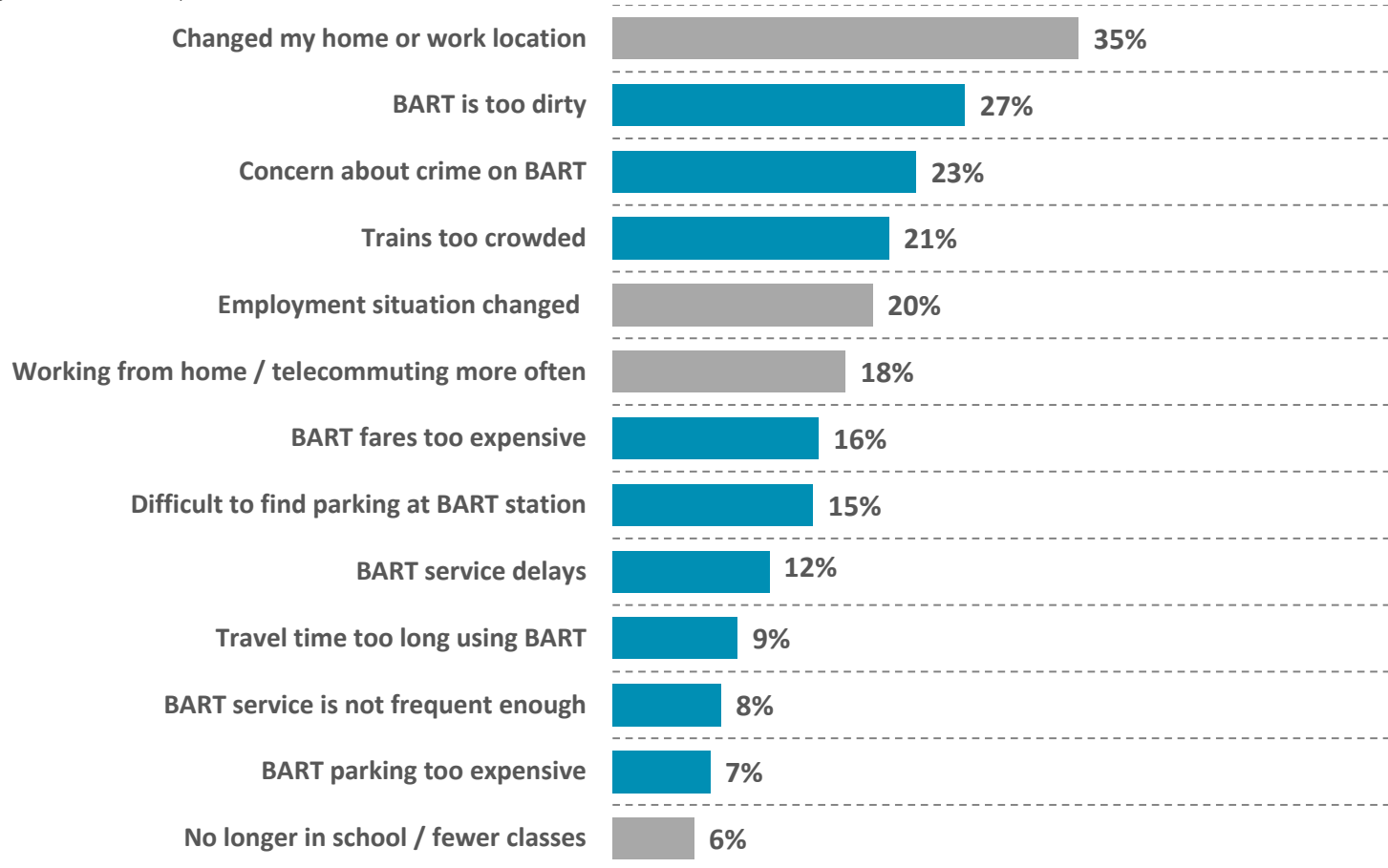


Spring 2018 Ridership Survey



What are the main reasons you are riding less often on weekdays, compared to a year ago?

Base: Riding BART less on weekdays



Trough to Peak

- Previous instance of satisfaction at 74% in 1998, after which satisfaction rose to an all-time high of 86% in 2004
- \$1.2 billion investment in renovation

| 18 Target Issues in 1998 | | 2 Target Issues in 2004 |
|--------------------------|----------------------------|--------------------------|
| TVM reliability | Station Agent avail. | Train cleanliness |
| Fare gate reliability | Personnel courtesy | Ticket refunds |
| Lines at exit gates | Ticket refunds | |
| Escalator avail. | Seat availability | |
| Elevator avail. | Train temperature | |
| Train cleanliness | Noise level | |
| Station cleanliness | PA announcements | |
| Station condition | Bus connections | |
| Personal security | Leadership in reg'l trans. | |

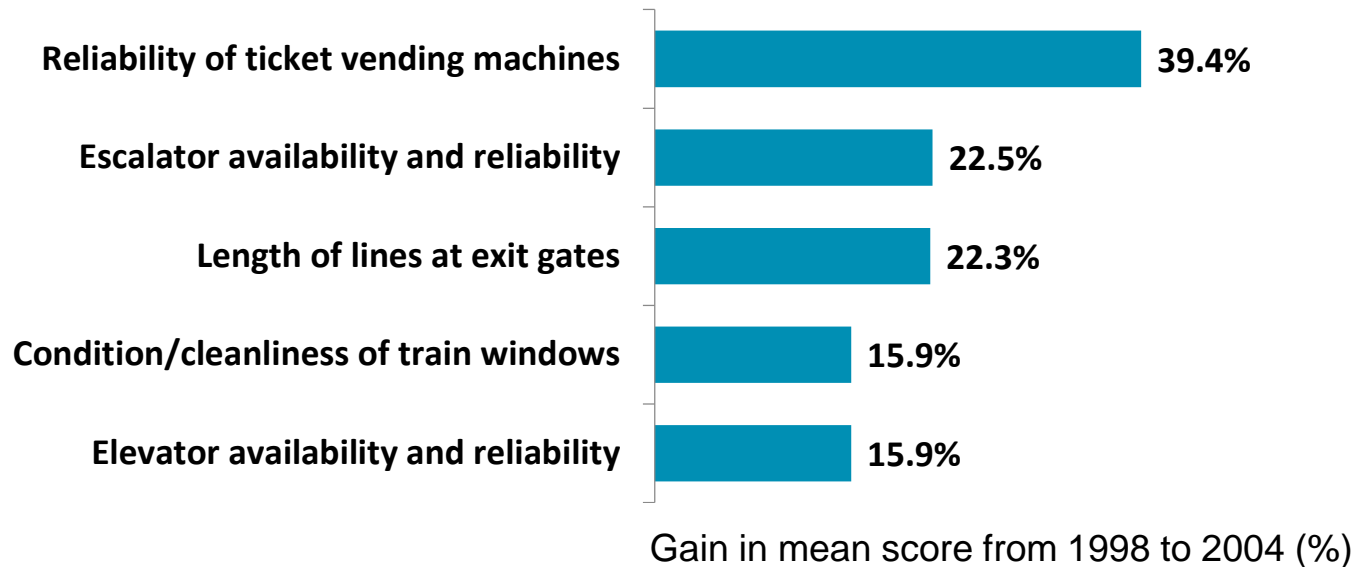
Conditions prior to 1998 Survey



Escalators out of service

Customer Ratings 1998 – 2004

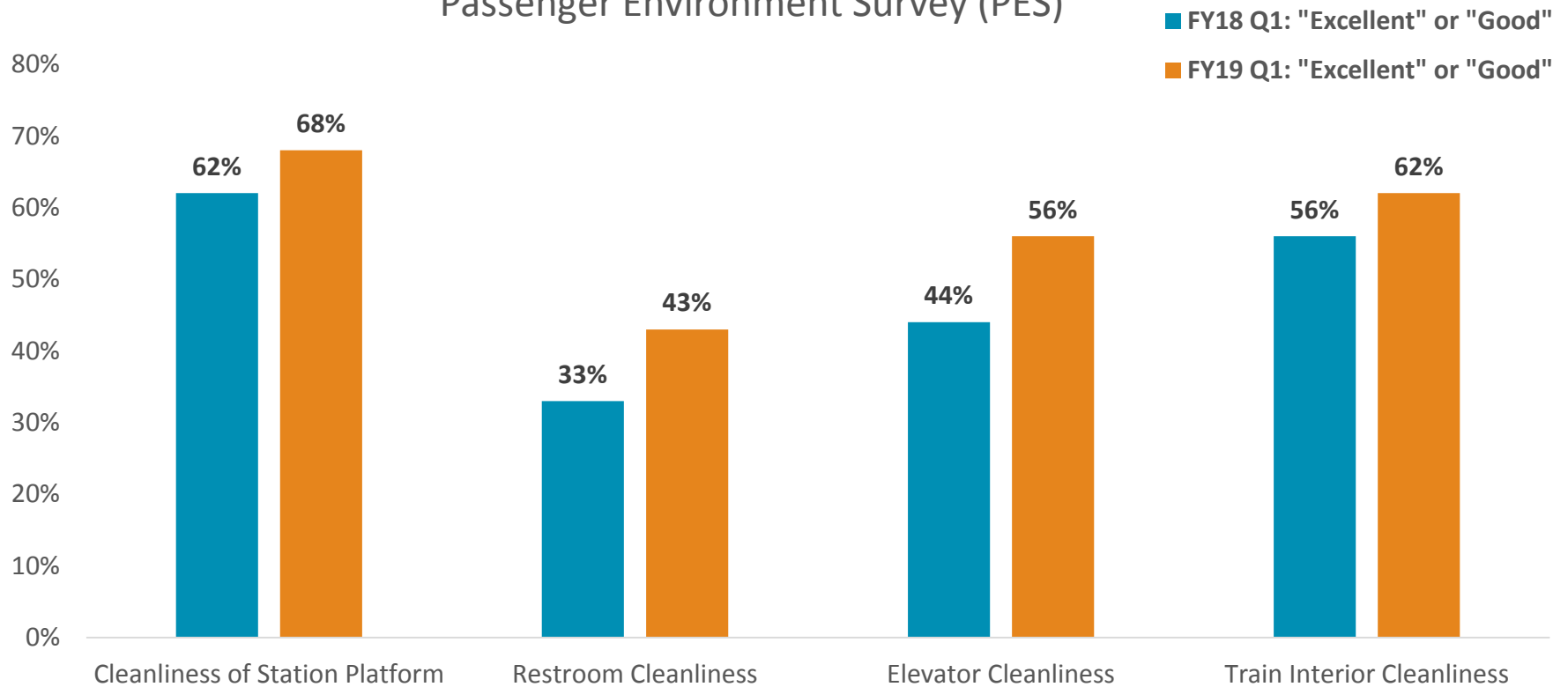
- Overall satisfaction grew from 74% to 86%. Top increases:



Turning the Corner Cleanliness Progress



Passenger Environment Survey (PES)

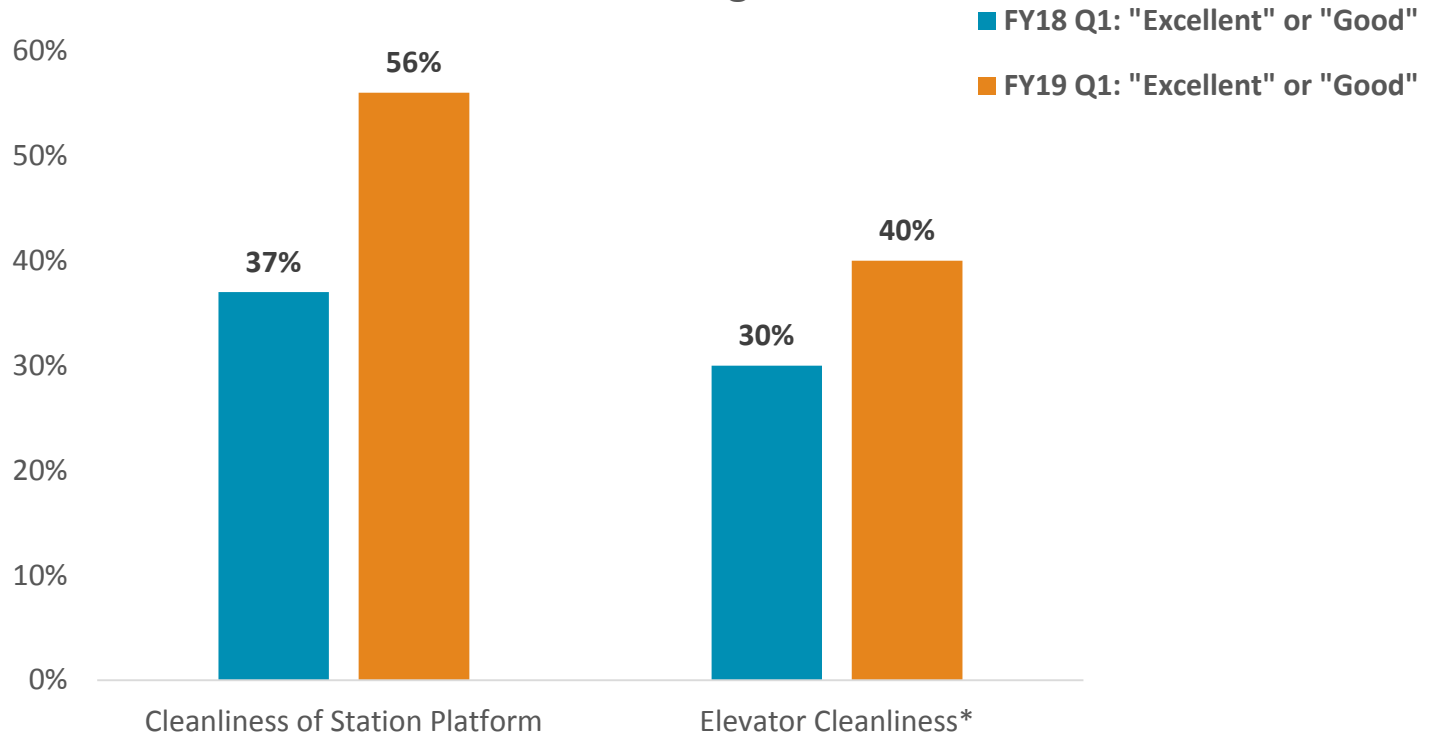


Turning the Corner

Civic Center Progress



Passenger Environment Survey (PES)
Civic Center Ratings



**Not statistically significant due to small sample sizes.*

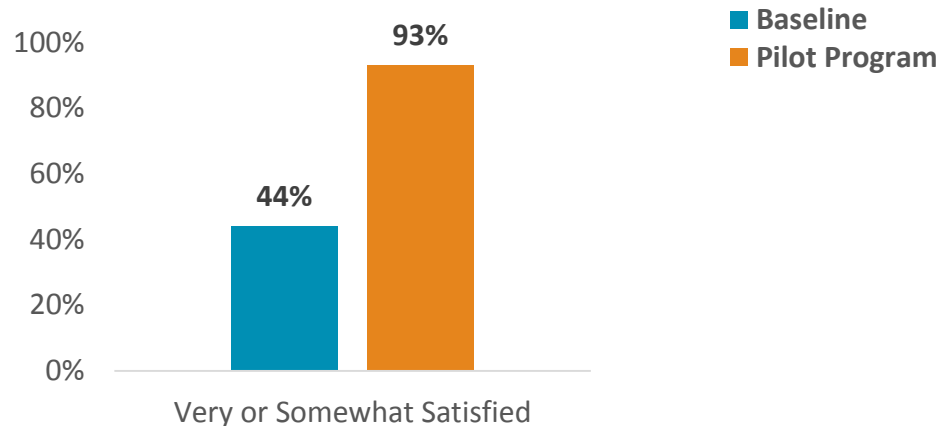
Turning the Corner

Elevator Attendant Pilot Program



- Elevator attendant program at Powell St. and Civic Center since April 30th.
- Elevator user survey at Civic Center showed satisfaction more than doubled after program started.

Civic Center Elevator Survey



“Please keep this going. I feel so much safer, and it doesn't smell.”

“Very good for people with disabilities.”

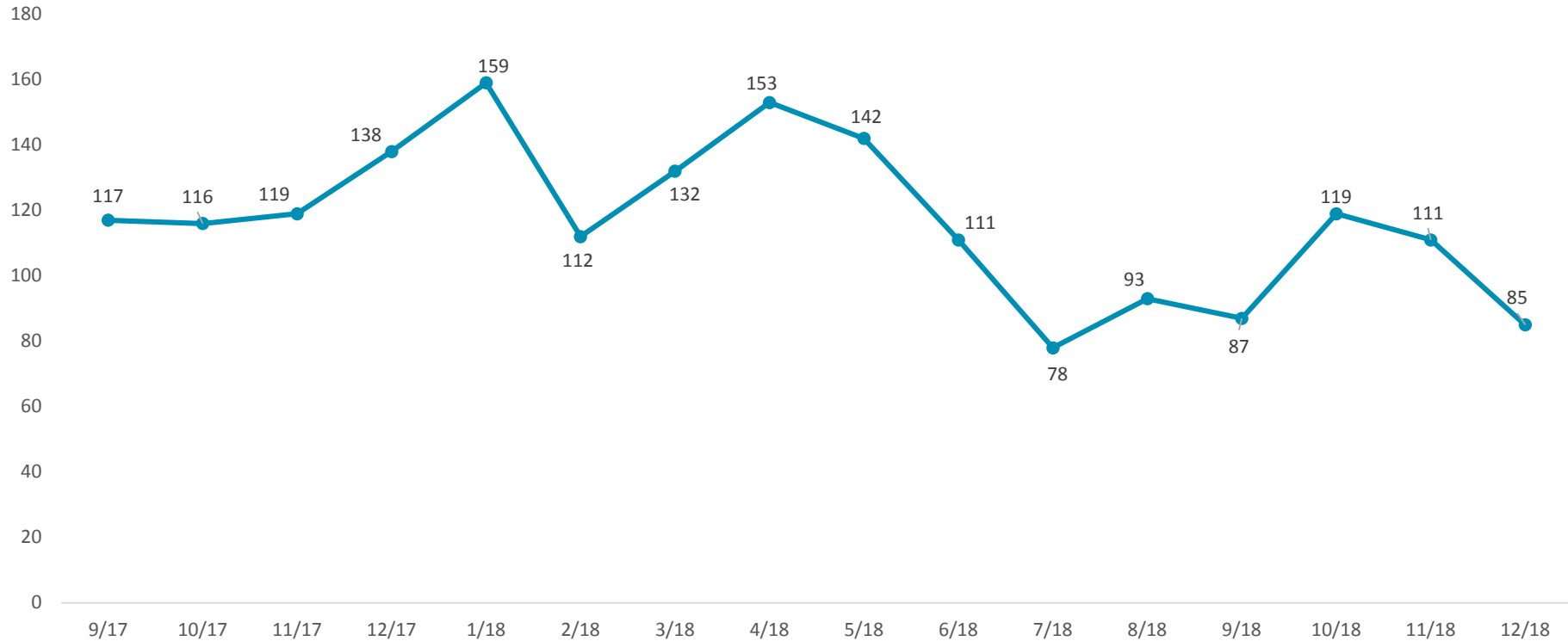
“Program amazing – commuting with two children.”

“Love elevator attendants – please keep them.”

Turning the Corner Homelessness Progress



Downtown San Francisco Station Transient Counts
September 2017 - December 2018



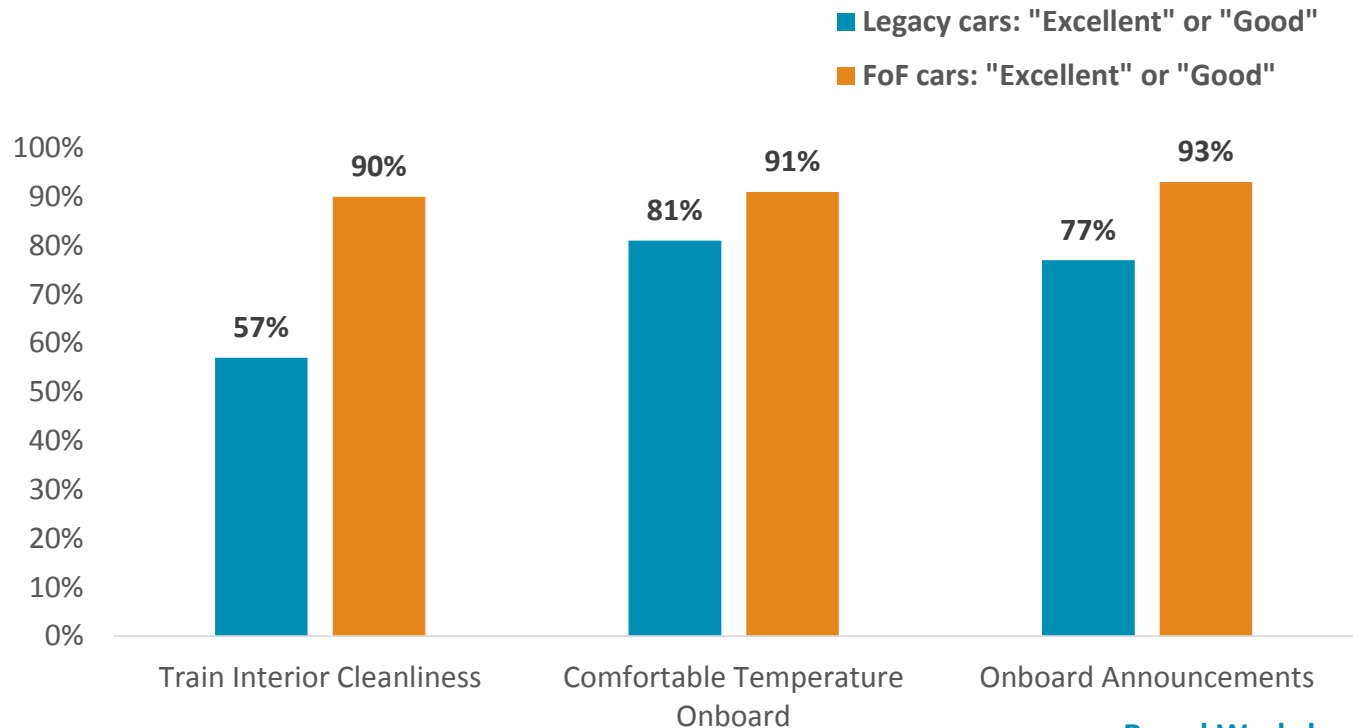
Turning the Corner

Impact of Fleet of the Future



- As new Fleet of the Future cars go into service, satisfaction is expected to improve.

Passenger Environment Survey (PES)
Q2 FY19



Customer Satisfaction Initiatives Underway



1. Homelessness
2. Cleanliness
3. Fare evasion
4. Safety and security
5. Fleet of the Future roll out

Summary

1. Customer satisfaction has declined
2. The top issues are related to quality of life – homelessness, security, fare evasion, and cleanliness
3. New initiatives are moving forward to address these issues, and there are signs that BART is beginning to turn a corner, but more will be needed to achieve higher customer satisfaction

Discussion

