SEPTA Customer Satisfaction Survey 2022

February 2023

Background / Methodology

- SEPTA Customer Satisfaction Survey (CSS) is historically conducted every 2 years
  - Due to COVID-19 & face-to-face interview methodology, 2020 CSS was cancelled
- SEPTA partnered with WBA Research to conduct the 2022 CSS
  - Data collected from April 27, 2022 through August 22, 2022
  - Riders were invited to participate in the survey by providing their contact information (name, phone, email) on a post card distributed by vendor staff at stations, stops, and onboard vehicles
    - 16,824 intercept interviews and 9,462 rider contacts collected
  - Survey respondents had the option of completing the survey online or by telephone interview
  - **1,482 riders** completed the survey
    - **2,478** Rider Mode Ratings (Riders could rate up to 3 modes)
- In order to ensure that sample is representative of the overall population the data is weighted by mode ridership
- Ratings in this report are mean average scores on a scale of 0 – 10

Rider Operations/Segments	Total
Broad Street Line	495
Market-Frankford Line	463
Bus/Trackless Trolley	654
Trolley	417
Regional Rail	449
Total Mode Ratings	**2,478**

- System-wide, Overall Performance Satisfaction rating averaged a 6.9 on a 0 – 10-point scale, down from 7.3 in 2018
  - The decline was driven by Sub-El satisfaction declining significantly since 2018
  - Bus, Trolley maintained at 2018 satisfaction levels and Regional Rail satisfaction increased significantly in 2022
- KPI ratings were down across the board system-wide with the largest declines in Cleanliness, Personal Security and Safety scores
  - Again, decreases in KPI satisfaction metrics were primarily due to BSL and MFL underperformance
- Areas where SEPTA must improve are Cleanliness and Personal Security on Sub/El and, to a lesser extent, Trolley
  - Cleanliness and Security concerns are the most commonly cited complaints on Sub/El in other customer feedback channels
- Larger societal issues, such as the growing population of people experiencing homelessness, the opioid crisis and rising crime in the city, are exacerbating existing challenges for the subway/elevated system
- SEPTA management is responding by investing significant resources into addressing cleanliness and security concerns of subway/elevated riders
- Areas to improve on other modes:
  - On Bus, Service Disruption communications are areas for improvement
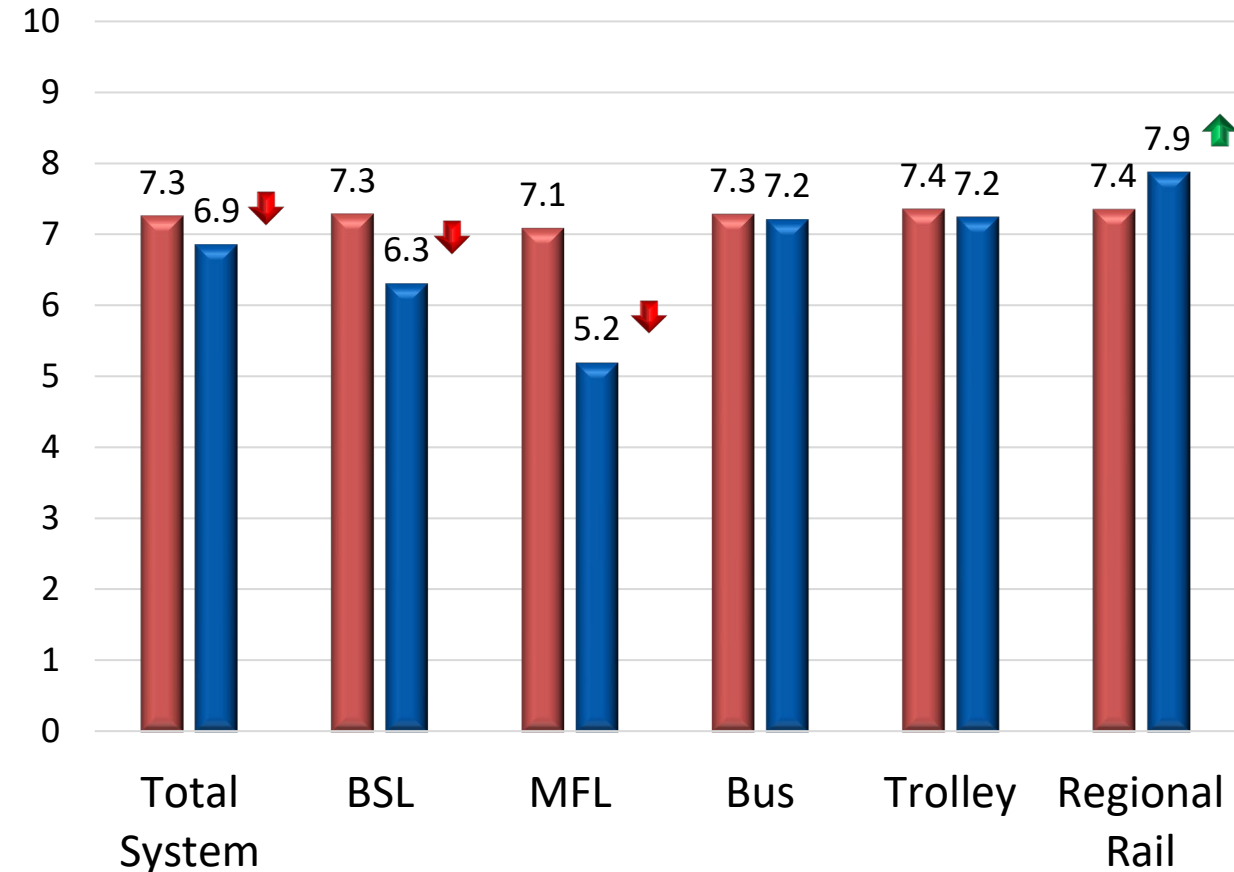 - On Regional Rail, Frequency of Service satisfaction ratings trailed other modes

Overall Mode Performance Satisfaction: Average Rating

(Scale of 0 – 10)

Bar chart showing Overall Mode Performance Satisfaction average ratings comparing 2018 and 2022:
- Total System: 2018 = 7.3, 2022 = 6.9 (significantly less)
- BSL: 2018 = 7.3, 2022 = 6.3 (significantly less)
- MFL: 2018 = 7.1, 2022 = 5.2 (significantly less)
- Bus: 2018 = 7.3, 2022 = 7.2
- Trolley: 2018 = 7.4, 2022 = 7.2
- Regional Rail: 2018 = 7.4, 2022 = 7.9 (significantly greater)

Legend: ■ 2018 ■ 2022

STAT TEST NOTE:
⬆ 2022 is significantly greater than 2018
⬇ 2022 is significantly less than 2018

- System-wide mode performance rating averages declined significantly in 2022, driven by Broad Street Line and Market-Frankford Line declines
  - Key areas driving dissatisfaction among subway/elevated riders are cleanliness and personal security (both onboard and at stations)
  - Larger societal issues, such as the growing population of people experiencing homelessness, the opioid crisis and rising crime in the city, are exacerbating existing challenges for the subway/elevated system
  - SEPTA is allocating significant resources through the SCOPE program to address Cleanliness and Security concerns among subway/elevated riders (See Slide 13 for more info on SCOPE)
- Bus, Trolley maintained at 2018 satisfaction levels and Regional Rail satisfaction increased significantly in 2022
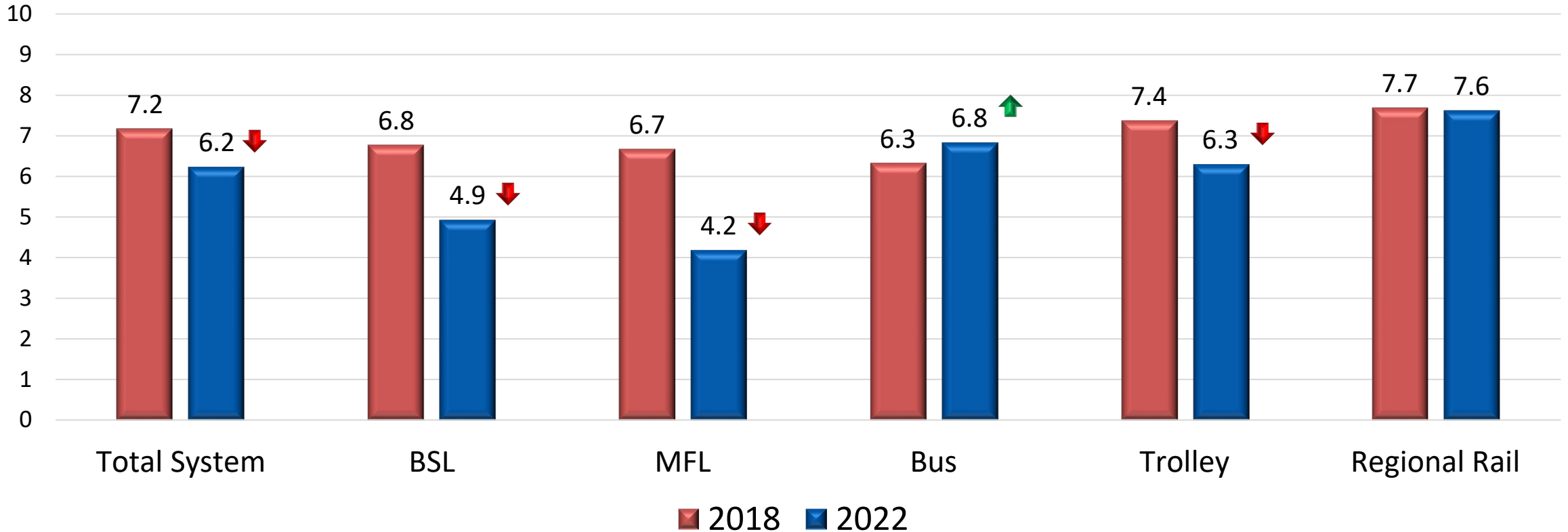
Overall Personal Security Ratings

- System-wide mode convenience rating averages declined significantly in 2022, again driven by Sub/Elevated drops
- MFL and BSL Personal Security ratings dropped a great deal while Trolley modes also saw a large decline
- Bus had improved Personal Security ratings from 2018 and Regional Rail maintained around 2018 levels

Overall Personal Security: Average Rating
(Scale of 0 – 10)

Legend: ■ 2018 ■ 2022

Mode	2018	2022
Total System	7.2	6.2 ↓
BSL	6.8	4.9 ↓
MFL	6.7	4.2 ↓
Bus	6.3	6.8 ↑
Trolley	7.4	6.3 ↓
Regional Rail	7.7	7.6

STAT TEST NOTE:
↑ 2022 is significantly greater than 2018
↓ 2022 is significantly less than 2018
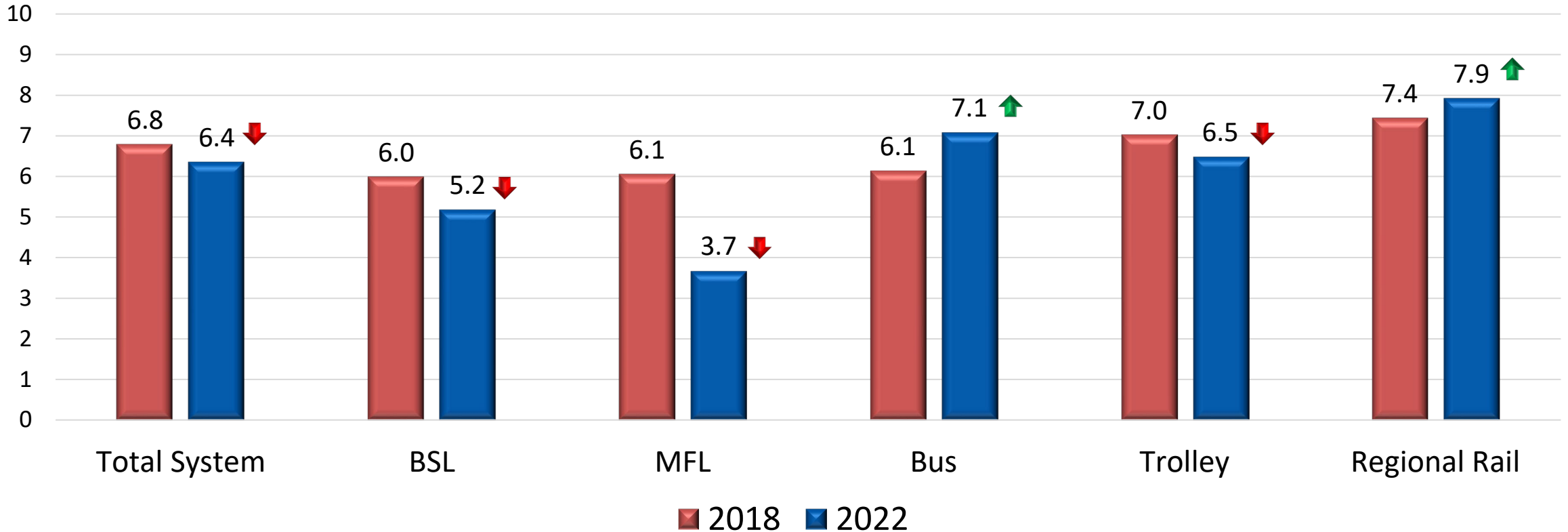
Overall Cleanliness Ratings

- System-wide mode cleanliness rating averages declined significantly in 2022, again driven by Sub/Elevated drops
- MFL Cleanliness ratings dropped 2.4 points (39%), while BSL and Trolley modes also saw stat sig declines
- Bus and Regional Rail had improved Cleanliness ratings in 2022

Overall Cleanliness: Average Rating
(Scale of 0 – 10)

Mode	2018	2022
Total System	6.8	6.4 ↓
BSL	6.0	5.2 ↓
MFL	6.1	3.7 ↓
Bus	6.1	7.1 ↑
Trolley	7.0	6.5 ↓
Regional Rail	7.4	7.9 ↑

■ 2018 ■ 2022

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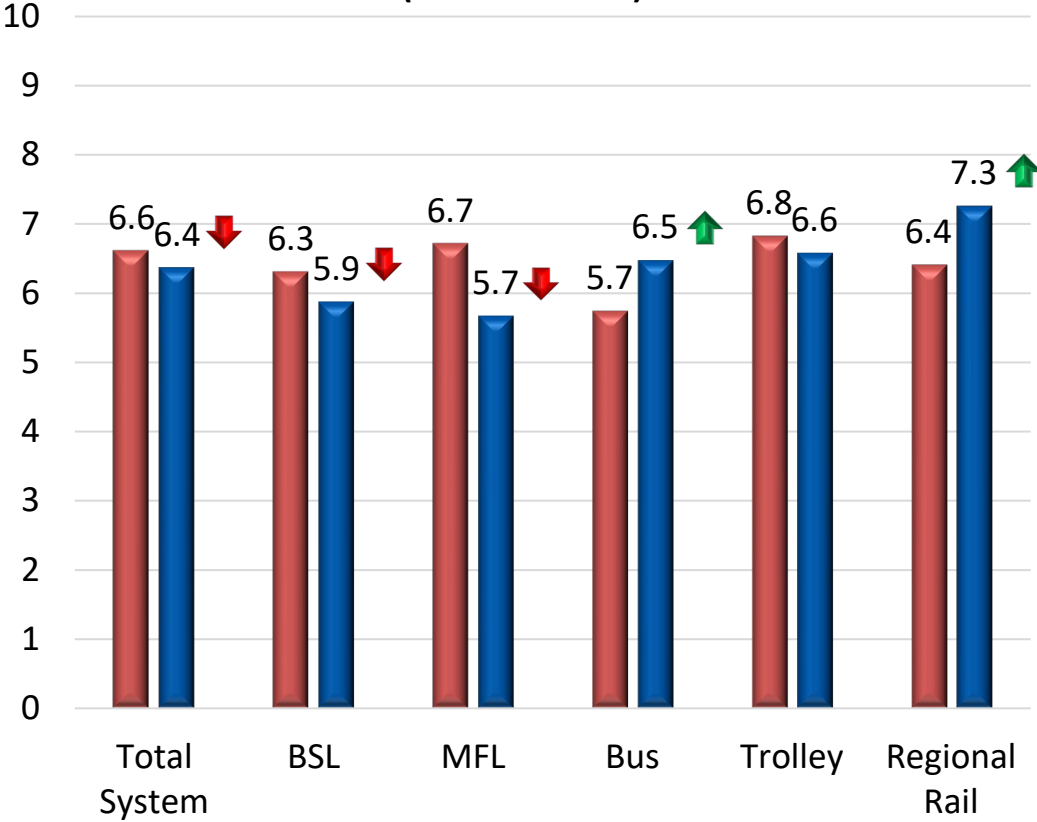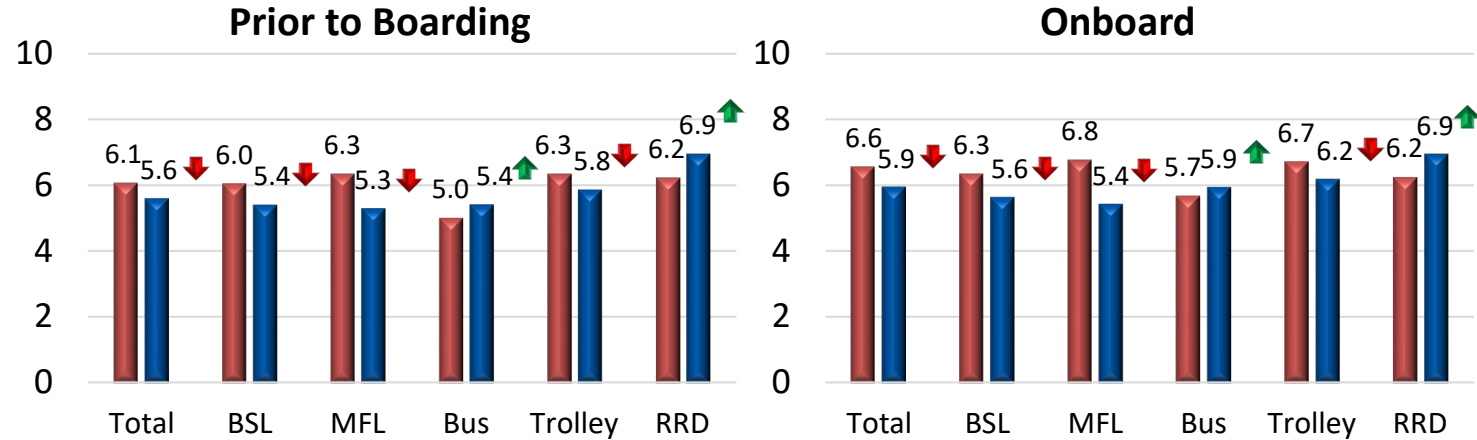
Communications Ratings

- Communications performance indicators follow a similar pattern with Broad Steet Line and Market-Frankford Line declines driving the system-wide average lower while other modes mostly maintain or improve from 2018 levels
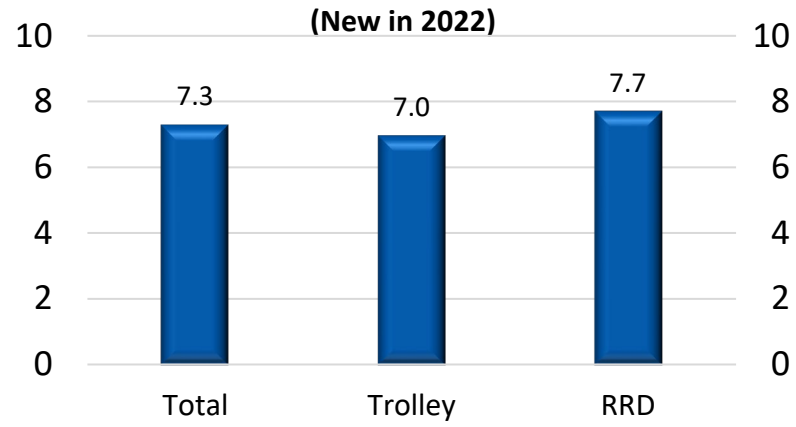
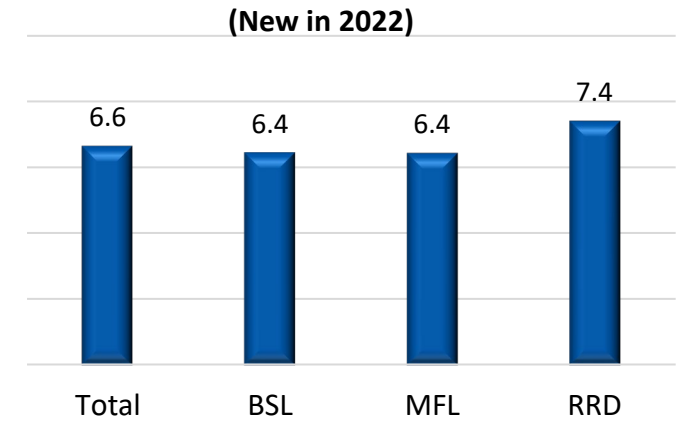### Overall Communications: Average Rating
(Scale of 0 – 10)

Service Disruption Communications

Prior to Boarding

	Total	BSL	MFL	Bus	Trolley	RRD
2018	6.1	6.0	6.3	5.0	6.3	6.2
2022	5.6	5.4	5.3	5.4	5.8	6.9

Onboard

	Total	BSL	MFL	Bus	Trolley	RRD
2018	6.6	6.3	6.8	5.7	6.7	6.2
2022	5.9	5.6	5.4	5.9	6.2	6.9

Project-Related Service Change Signage
(New in 2022)

Total	Trolley	RRD
7.3	7.0	7.7

Wayfinding Signage
(New in 2022)

Total	BSL	MFL	RRD
6.6	6.4	6.4	7.4

STAT TEST NOTE:
- ↑ 2022 is significantly greater than 2018
- ↓ 2022 is significantly less than 2018

2018 **2022**

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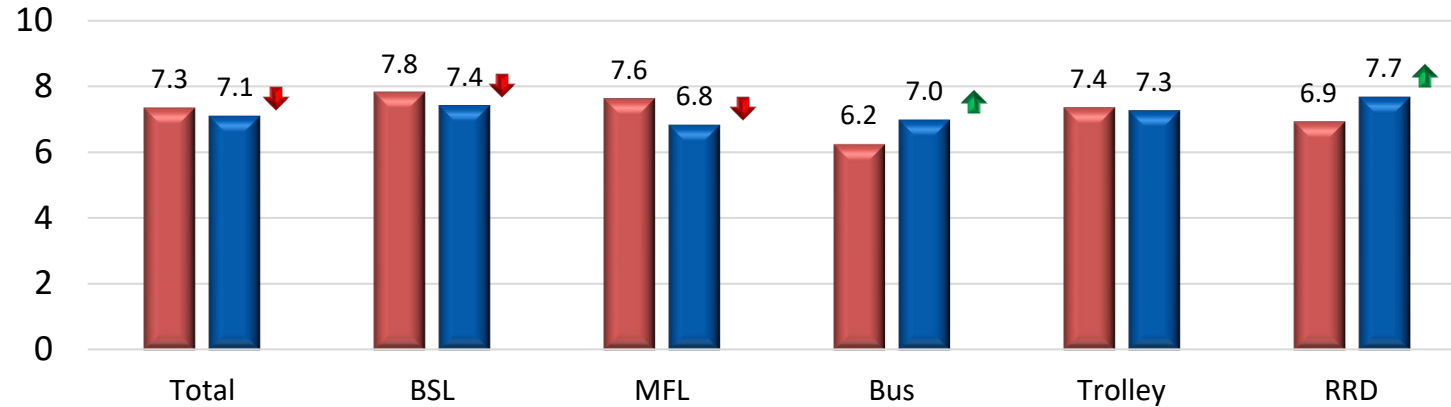## Convenience Ratings

- Convenience performance indicators also follow a similar pattern with Broad Steet Line and Market-Frankford Line declines driving the system-wide average lower while other modes mostly maintain or improve from 2018 levels

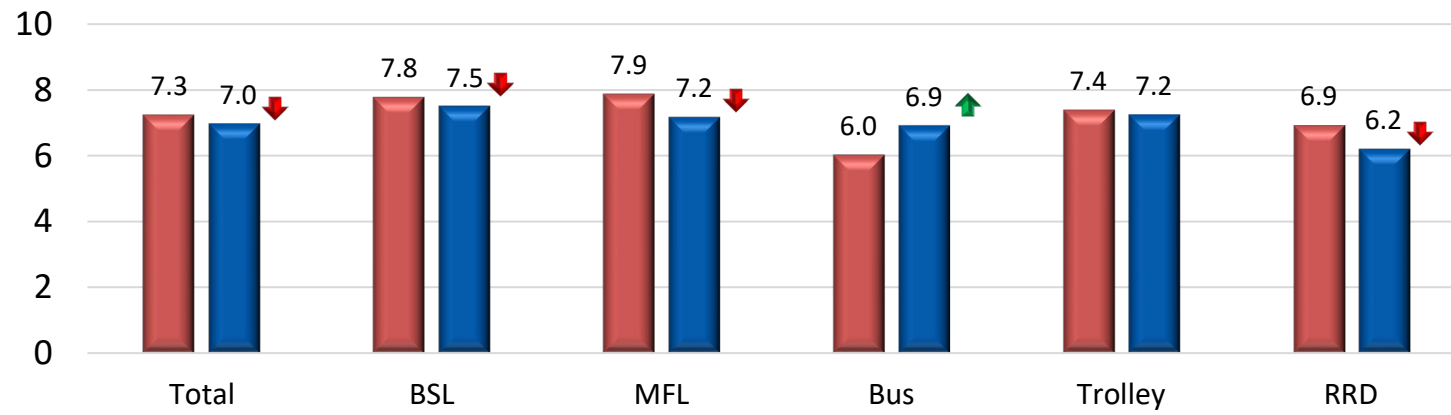 - Regional Rail riders are less satisfied with service frequency in 2022 than they were in 2018

Overall Convenience: Average Rating
(Scale of 0 – 10)

	Total System	BSL	MFL	Bus	Trolley	Regional Rail
2018	7.5	7.9	7.7	6.4	7.6	7.4
2022	7.3 ↓	7.5 ↓	6.9 ↓	7.3 ↑	7.4	7.5
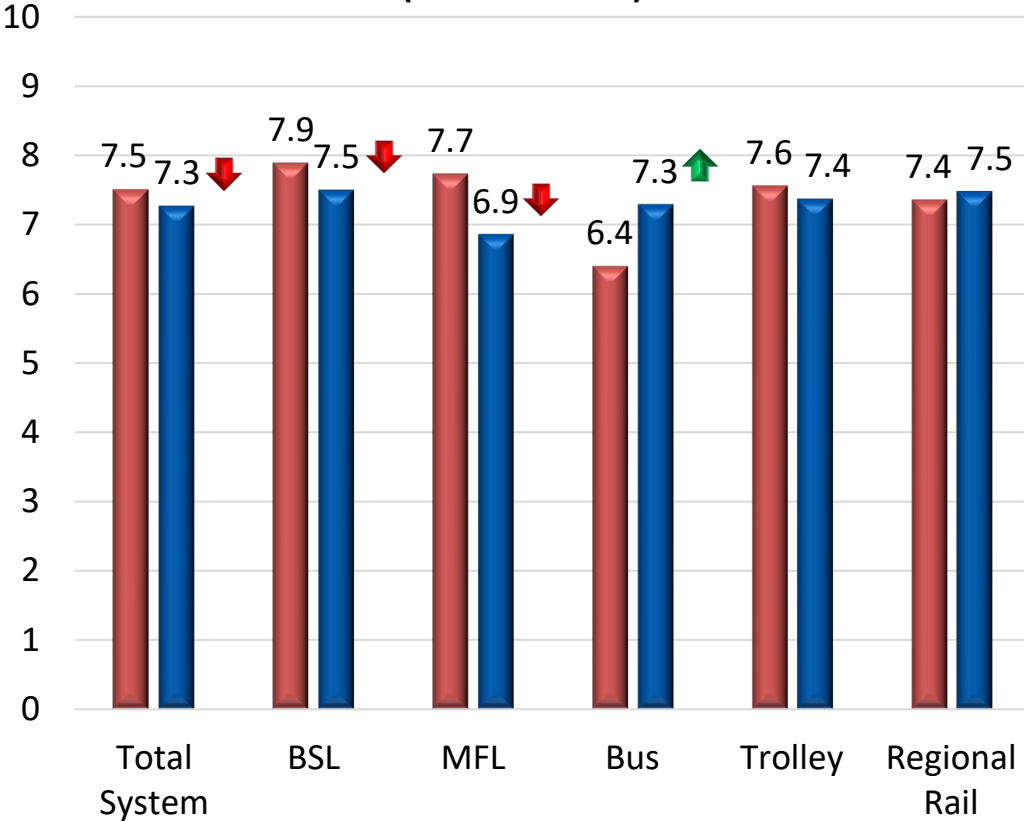
Reliability (On-Time Performance)

	Total	BSL	MFL	Bus	Trolley	RRD
2018	7.3	7.8	7.6	6.2	7.4	6.9
2022	7.1 ↓	7.4 ↓	6.8 ↓	7.0 ↑	7.3	7.7 ↑

Frequency of Service

	Total	BSL	MFL	Bus	Trolley	RRD
2018	7.3	7.8	7.9	6.0	7.4	6.9
2022	7.0 ↓	7.5 ↓	7.2 ↓	6.9 ↑	7.2	6.2 ↓

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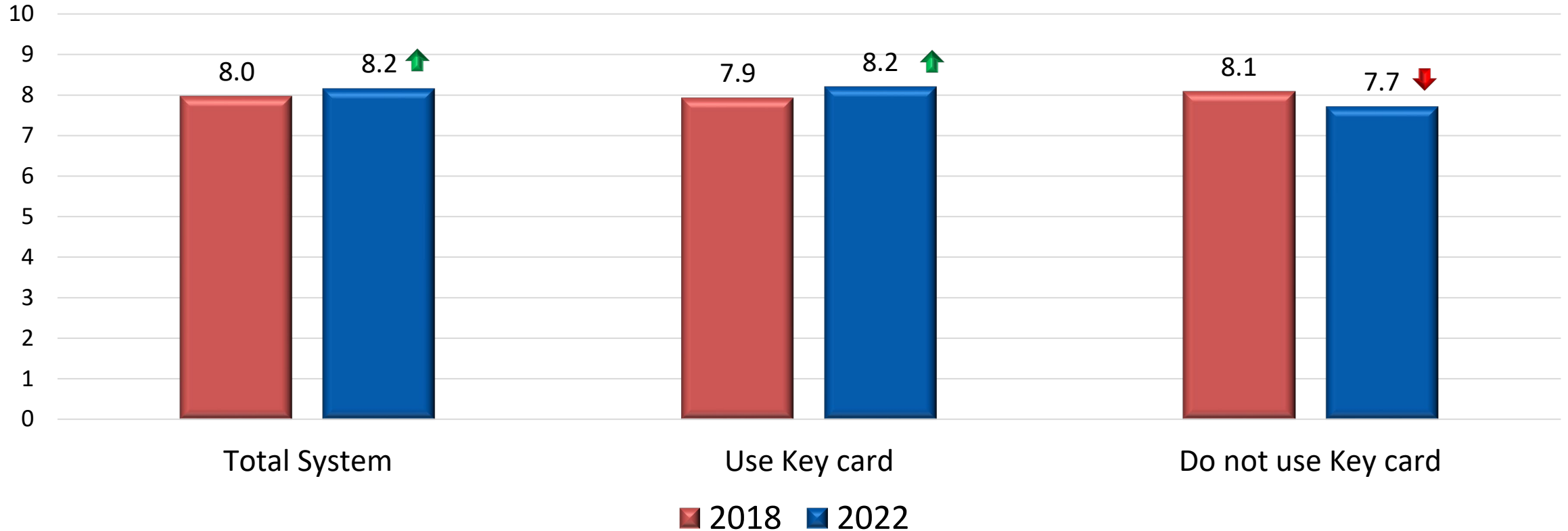■ 2018 ■ 2022

Convenience Category: Ease of Fare Purchase Ratings

- Ratings for ease of purchasing a fare rose significantly in 2022 with Key card holders enjoying the greatest ease
- After a learning curve, riders have embraced SEPTA Key

Convenience Category: Ease of Purchasing Fare Average Rating
(Scale of 0 – 10)

	Total System	Use Key card	Do not use Key card
2018	8.0	7.9	8.1
2022	8.2 ⬆	8.2 ⬆	7.7 ⬇

■ 2018 ■ 2022

STAT TEST NOTE:
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- While Employee Courtesy ratings maintained at 2018 levels, the Courtesy of Other Riders declined nearly a full point from 6.8 in 2018 to 5.9 in 2022

Courtesy Ratings
(Scale of 0 – 10)

STAT TEST NOTE:
⬆ 2022 is significantly greater than 2018
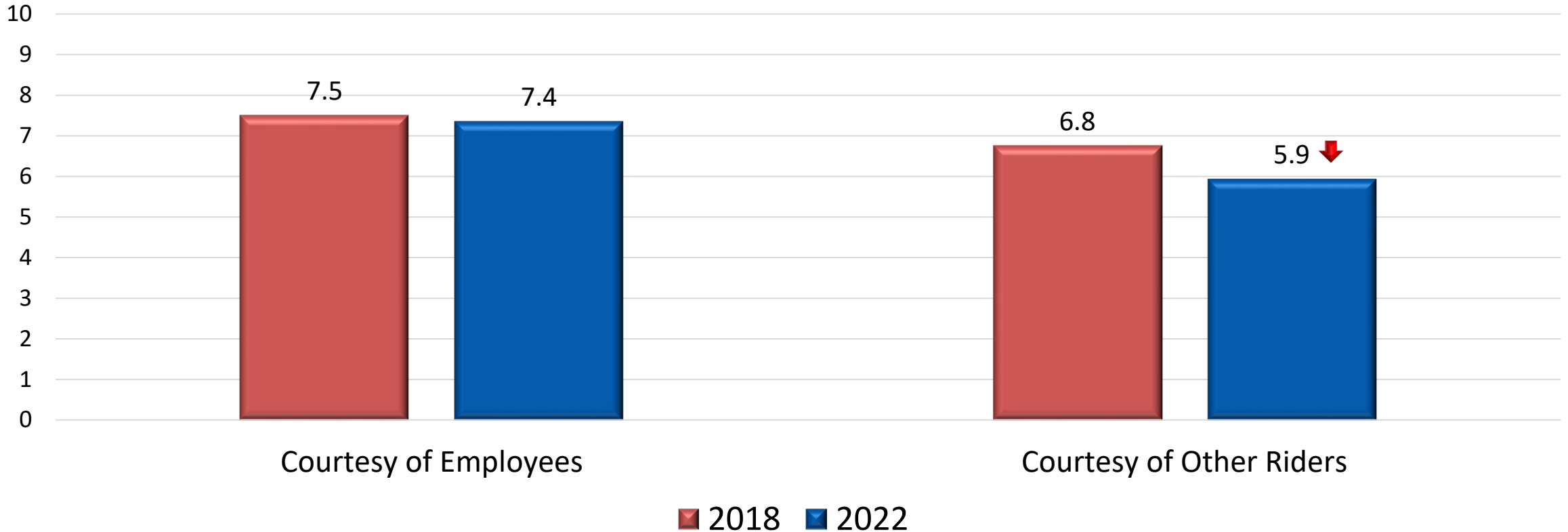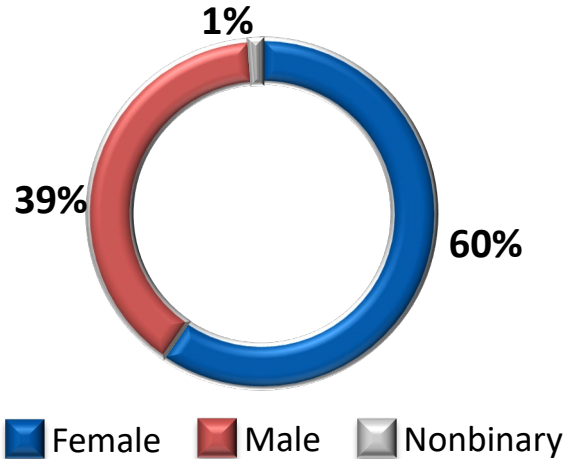⬇ 2022 is significantly less than 2018

Demographics: Gender, Age and Race-Ethnicity

Gender*

- 1%
- 39%
- 60%

■ Female   ■ Male   □ Nonbinary

- Six in ten riders (60%) are female
- The percentage of African American riders increased significantly from 2018
- While the percentage of White riders declined

Age
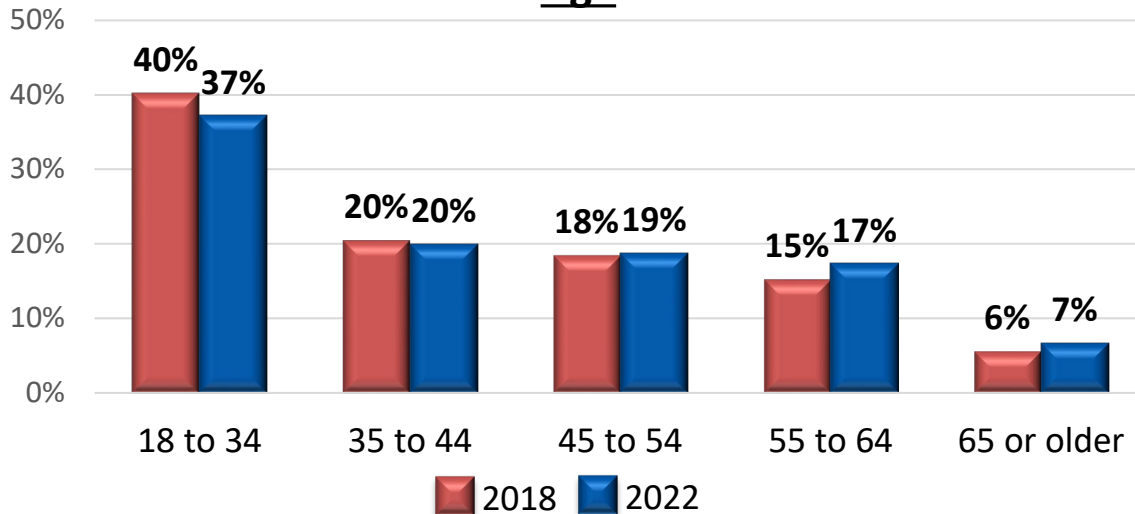
Age	18 to 34	35 to 44	45 to 54	55 to 64	65 or older
2018	40%	20%	18%	15%	6%
2022	37%	20%	19%	17%	7%

■ 2018   ■ 2022

Race-Ethnicity**

	2018	2022
African American or Black	48%	54% ▲
Caucasian or White	43%	35% ▼
Hispanic or Latino	7%	8%
Asian or Pacific Islander	5%	5%
Native American or Alaska Native	0%	1%
Middle Eastern or North African	0%	1%
Other	1%	2%

■ 2018   ■ 2022

STAT TEST NOTE:

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▼ 2022 is significantly less than 2018

*New categories in 2022, cannot compare to 2018
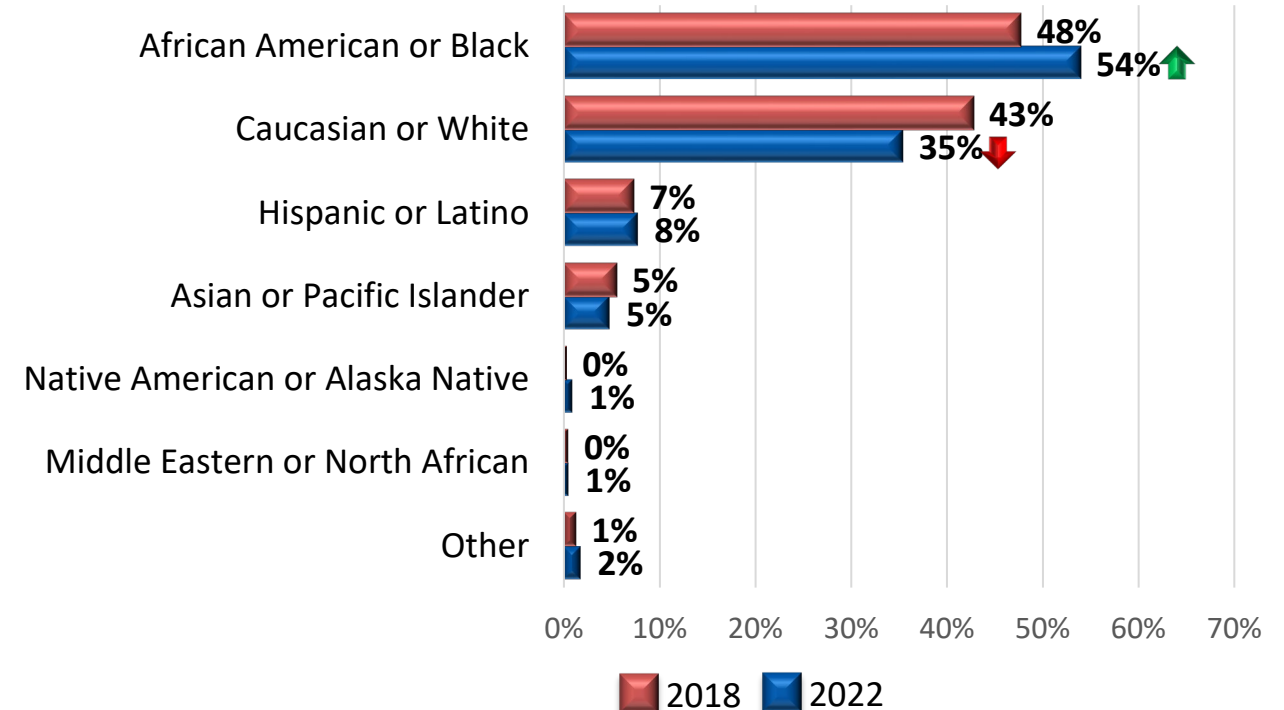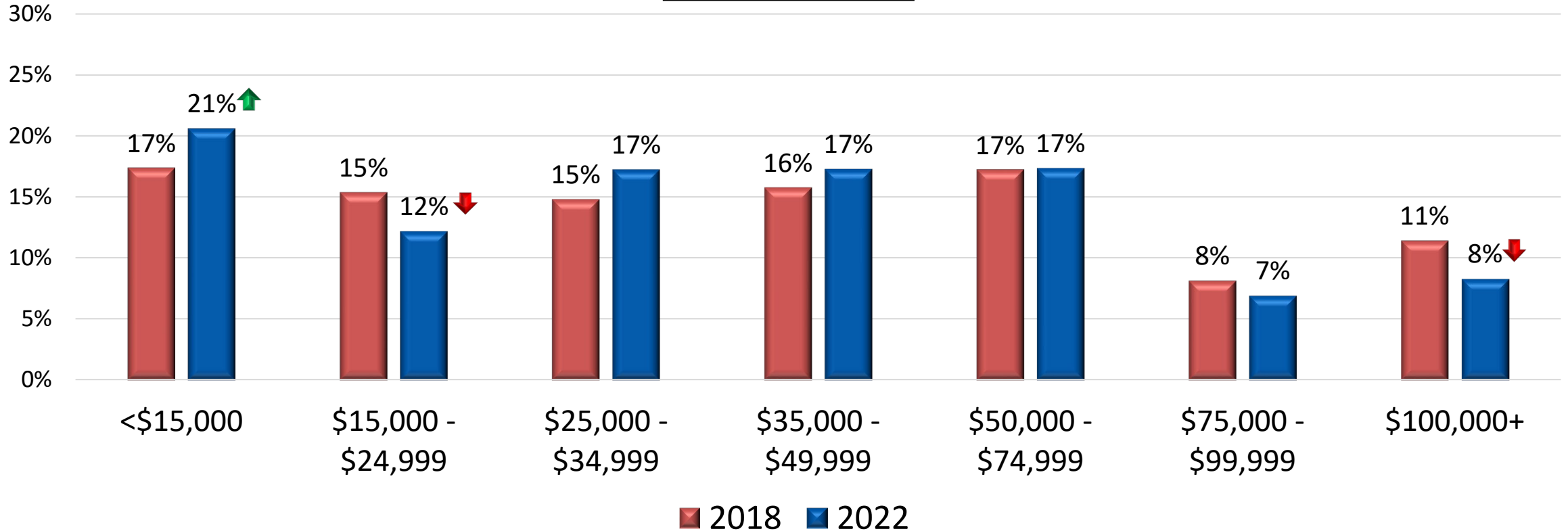
**Multiple responses allowed- Sums to more than 100%

Demographics: Household Income

- There were significant changes in household income distribution at both ends of the spectrum
- There was a significant decline in riders making $100,000 or more from 2018 and a commensurate increase in riders making less than $15,000

Household Income

Legend: ■ 2018 ■ 2022

Household Income	2018	2022
<$15,000	17%	21% ▲
$15,000 - $24,999	15%	12% ▼
$25,000 - $34,999	15%	17%
$35,000 - $49,999	16%	17%
$50,000 - $74,999	17%	17%
$75,000 - $99,999	8%	7%
$100,000+	11%	8% ▼

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Next Steps for SEPTA

- SEPTA management is responding by investing significant resources to address rider concerns about subway/elevated service:
  - To address security concerns, SEPTA is:
    - Increasing its security budget by 50% to $53 million and is aggressively pursuing hiring more SEPTA Transit Police
      - New SEPTA Transit Police hiring initiative yielding 2,500 applicants to date
      - 22 new new recruits in January's academy class, the largest class in over 20 years!
    - Adjusting SEPTA Transit Police deployment to have a greater presence onboard Market-Frankford Line trains
    - Established the creation of a Virtual Patrol Center to monitor SEPTA's vast network of station and concourse cameras
    - Upgrading station lighting, ADA accessibility, emergency call boxes, station cameras, etc. where needed
    - Piloting "Zero Eyes" artificial intelligence-enabled crime prevention technology to detect weapons at stations & on platforms
    - Increasing awareness of the SEPTA Transit Watch app which allows riders to report a crime or dangerous situation
  - To address cleanliness issues, SEPTA has increased headcount for cleaning staff by over one-third
- To free up police resources and address the growth in the population of people experiencing homelessness on the system, SEPTA is filling 145 new safety and outreach contractor roles such as Outreach Specialists & Health Navigators as part of the SCOPE (Safety, Cleaning, Ownership, Partnership and Engagement) program
  - SCOPE also helps coordinate efforts by regional partners, such as homeless service providers, government agencies, nonprofits, community organizations and academic groups. As these problems are larger than any one agency, solutions will take effort from all in the region. For more information, please visit the SCOPE webpage on SEPTA.org
- SEPTA will also be conducting a quarterly Pulse Survey for riders to share their experiences & provide performance assessments
  - The SEPTA Pulse Survey will provide frequent survey data to track authority performance over time

THANK YOU!