

Customer
Satisfaction
Survey &
COVID Study

LIRR
Survey Results

November 2021

Fall 2021
Customers Count



Customers Count Executive Summary

- Most lapsed* (81%) and current** (83%) customers say 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 midday off-peak.
- Current** customers who are riding less (67%) cite working from home (63%) and COVID concerns (32%) as the top reasons. Of all customers who will ride in the future, those that will be riding less (48%) because of work from home (70%) and COVID concerns (26%).
- During the pandemic, customers have used personal vehicles (87%) rather than use the LIRR 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: the number of people panhandling/ experiencing mental illness/homelessness at destination station, cost of a ticket, customers wearing face masks or coverings, peak service frequency, and off-peak service frequency.
- The most important factors for riding in the future for lapsed* customers was “social distancing on trains” (87%) and for current** customers they were “my health and safety concerns regarding using LIRR have been satisfied” (87%) and “cost of ticket” (87%).
- Lapsed* and current** customers anticipate 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* LIRR 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, & factors influencing future usage regarding riding LIRR trains.

Obtain

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

Identify

Identify what strategies LIRR can employ to increase ridership and incentivize customers to return to the railroad.

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

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

Research Methodology

- An e-survey of LIRR current* & lapsed** customers launched on September 20, 2021 through October 4, 2021.
- Obtained an excellent response with nearly 22,000 total responses: Approximately 4,800 responses were lapsed** and 17,000 were current* customer responses.
- Extensive campaign to boost response rates throughout the region.
- Data was weighted using August 2021 Ridership counts for the current* customers, and the difference between August 2019 Ridership and August 2021 Ridership was used 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.

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

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



Employer Plans to Reopen Work Location Lapsed vs. Current

Employer Reopening?	Lapsed %	Current %
Yes, plans on opening work locations	54%	40%
No, but plans on reopening at another location in NY Metropolitan area	2%	1%
No, but plans on reopening outside NY Metropolitan area	1%	1%
No, does not plan on reopening/business closed	2%	1%
My business never closed/is currently opened	27%	43%
Don't know	14%	14%

Future Telecommuting Among Lapsed Customers

Work from home after directed to return to work	Fall 2020 %	Fall 2021 %
Net: Yes	65%	75%
4+ times per week	20%	26%
3 times per week	18%	21%
1-2 times a week	18%	21%
1-3 times a month	4%	4%
Less than once per month	2%	2%
Every other day or week, about 50% of the time	3%	1%
None of the time	12%	12%
Don't know	23%	13%

Differences in Customer Trip Purpose Lapsed vs. Current

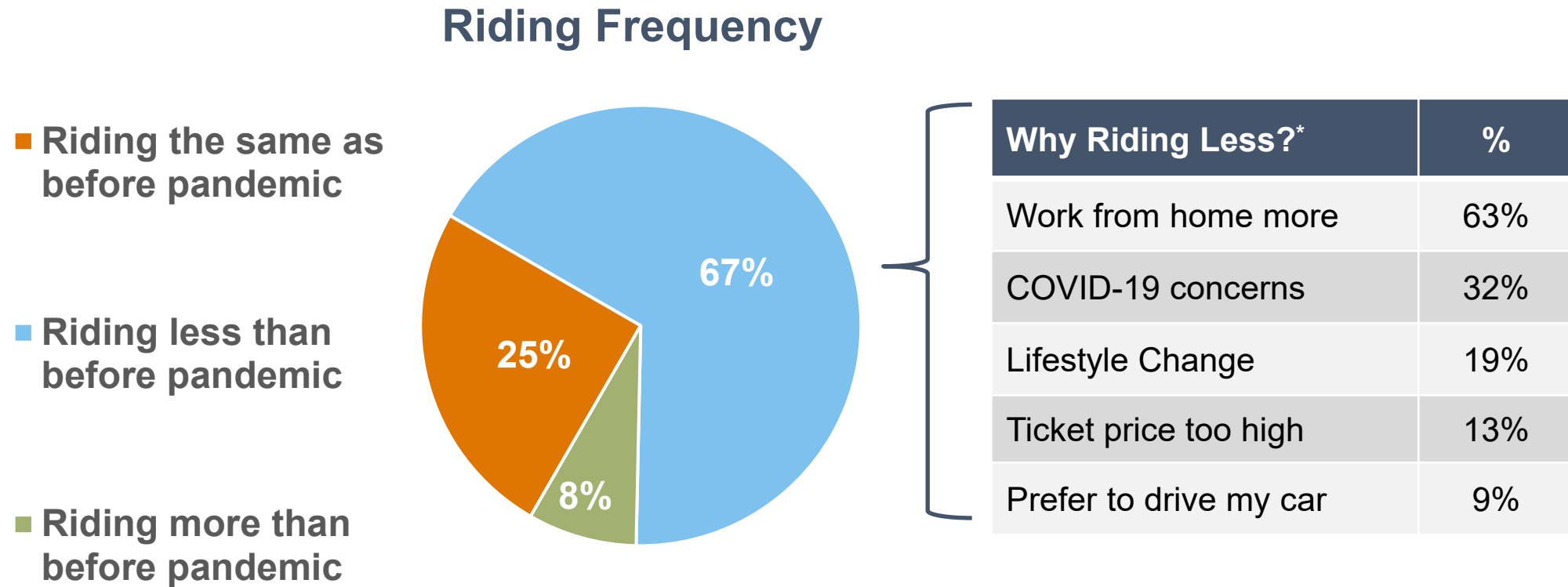
Trip Purpose	Lapsed Customers	Current Customers
Commuting to/from regular workplace	66%	50%
Recreation (e.g., dining/entertainment/vacation)	15%	17%
Personal business (visiting friends/family, non-medical personal)	8%	19%
For business reasons (not to regular workplace)	7%	5%
Medical or health needs for yourself or someone you care for	1%	3%
Commuting to/from school	2%	3%
Shopping	<.5%	1%
Other	1%	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)	71%	56%	-15
Monday to Friday (10AM to 3:29PM)	18%	26%	8
Monday to Friday (3:30PM to 7:59PM)	62%	57%	-5
Monday to Friday (8PM to 11:59PM)	15%	19%	4
Monday to Friday (Midnight to 5:59AM)	4%	7%	3
Saturday and Sunday (Weekends)	24%	40%	16

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

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

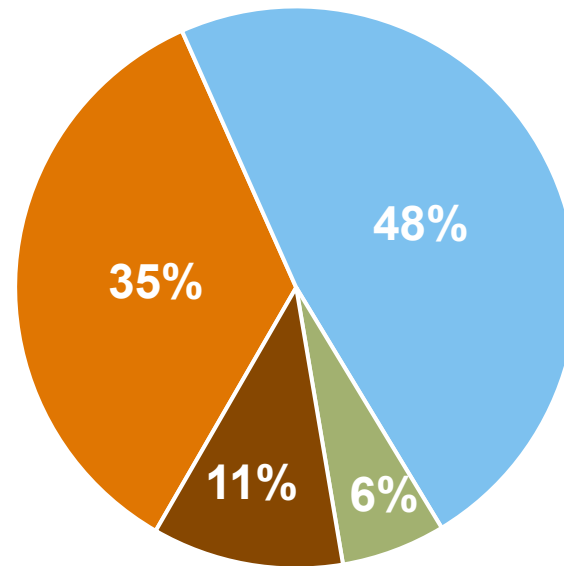


*Multiple responses allowed so may add up to more than 100%. Top responses shown

Future Customers*: Reasons for Riding LIRR Less Than Before Pandemic (Among Those Stating Riding Less)

Riding Frequency

- Riding the same as before pandemic
- Riding less than before pandemic
- Riding more than before pandemic
- Don't know



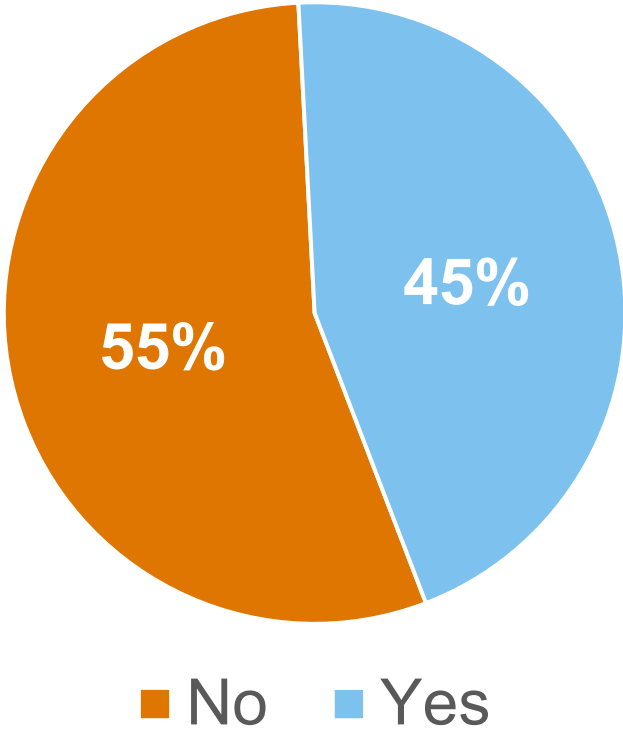
Why Riding Less? **	%
Work from home more	70%
COVID-19 concerns	26%
Ticket price too high	18%
Lifestyle change	15%
Prefer to drive my car	12%

*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 LIRR (Among all Customers who Rode Prior to the Pandemic)

Alternative Transportation



Alternate Modes*	%
Personal vehicle owned/leased by you or a member of your household	87%
App-based eHail (Uber, Lyft, Via, etc.)	16%
Dropped off in a personal vehicle	11%
Car Service	9%

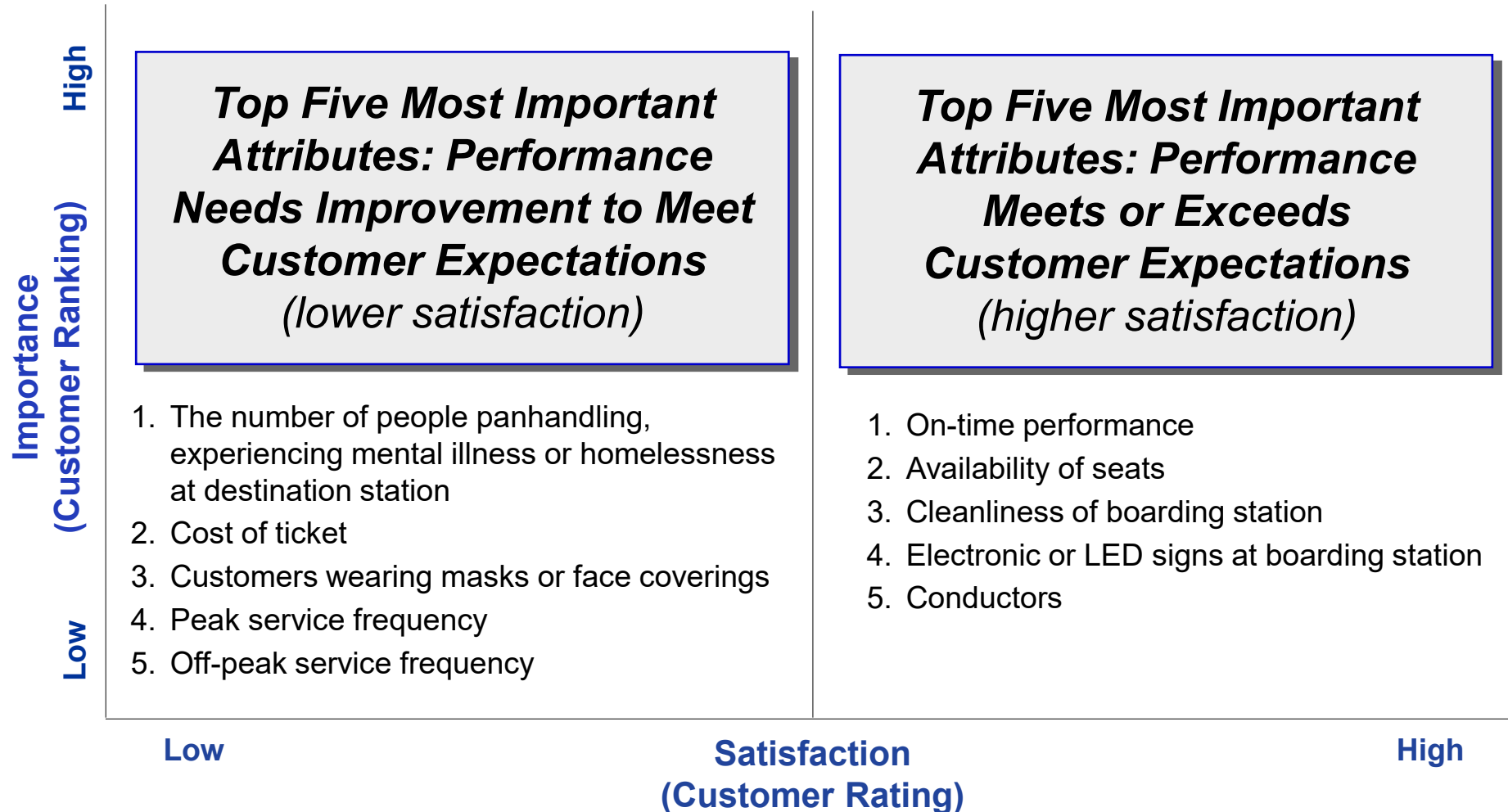
*Multiple responses allowed so may add up to more than 100%.

Customers' Future Usage of LIRR

When COVID Related Restrictions are Fully Lifted: Lapsed vs. Current

Future Use of the LIRR	Lapsed Customers	Current Customers
Never	6%	1%
Less than once a month	23%	13%
Less than one day a week but at least once a month	14%	19%
One or two days per week	18%	18%
Three or four days per week	13%	17%
Five days per week	8%	20%
Six or seven days per week	1%	4%
Don't know	17%	8%

Long Island Rail Road Customer Key Drivers



Current Customers' Service and Travel Information Sources

Primary channels*	%
LIRR TrainTime	61%
MYmta app	47%
MTA.info website	33%
TV or radio news	10%
MTA/LIRR pages on social media	7%
Friends and family	6%
Online news	3%
Other app	2%
Other social media	3%
E-mail	13%
Newspapers	1%
SMS/Text alert	7%
Railroad Employees	3%
Other	1%
I do not receive LIRR service communications	6%

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

Real-Time Information Lapsed vs. Current

Awareness of real-time information available in the TrainTime mobile app:	Lapsed % Aware	Current % Aware
Train Capacity	37%	56%
Train Location	51%	65%
Seat Availability	29%	52%

74%

of current customers have used the app features

91%

of those who used them, found the features useful.

* Answer options include Not Aware, Not Sure

Future LIRR Travel: Factors Influencing Future Usage Lapsed vs. Current

Factors in decision to increase LIRR usage in the future	Lapsed Customer % Important	Current Customer % Important	Difference Lapsed to Current (PPT)
LIRR's peak service frequency	75%	76%	1
LIRR's off-peak service frequency	63%	80%	17
Knowing how crowded a LIRR train will be before boarding	80%	74%	-6
My health and safety concerns regarding using LIRR have been satisfied	86%	87%	1
Most people are vaccinated for COVID-19	82%	81%	-1
My personal security concerns regarding using the railroad have been satisfied	85%	86%	1
Social distancing on trains, so you do not sit directly next to anyone	87%	83%	-4
My personal security concerns using the New York City Subway and Bus system have been satisfied	82%	80%	-2
Employer directing you to return to your work location	73%	74%	1
Cost of ticket	85%	87%	2

Future Ticket Types Lapsed vs. Current

Ticket Type	Lapsed Customer*		Current Customer**	
	Past %	Future %	Current %	Future %
Monthly	52%	11%	13%	23%
Round Trip Off-Peak	14%	15%	28%	18%
Senior/Disabled (All Types)	5%	7%	6%	7%
Ten-Trip Peak	6%	17%	2%	8%
Ten-Trip Off-Peak	5%	7%	23%	14%
Round Trip Peak	7%	8%	3%	4%
One-Way Off-Peak	4%	4%	18%	11%
One-Way Peak	3%	3%	2%	2%
Weekly	1%	1%	1%	2%
One-Way Atlantic Ticket	<.5%	<.5%	1%	<.5%
Weekly Atlantic Ticket	<.5%	<.5%	<.5%	1%
CityTicket	1%	1%	2%	1%
Other	1%	1%	1%	1%
Don't know	N/A	18%	N/A	7%
I do not plan to return to using LIRR	N/A	7%	N/A	1%

*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).

Key Take-aways

- Obtained an excellent response with nearly 22,000 customers completing the online survey.
- Over half of lapsed customers (54%) stated that their employer plans to open their work location, with an additional 27% stating its already open. Current customers had 40% stating employer will open work location, and 43% saying it's already open.
- The percentage of lapsed customers who will continue to work from home, increased from 65% in 2020 to 75% in the current study. Future telecommuting plans among lapsed customers are more definitive than in 2020 as only 13% in the current survey stated, "*Don't know*".
- Current customers reported riding less for commuting, and more for personal business (19%) than lapsed customers (8%).

Key Take-aways

- Current customers have reported riding less frequently during the AM and PM weekday peak than lapsed customers. Current customers are riding more frequently on the weekends (40%) than lapsed customers (24%).
- Among current customers nearly 7 in 10 stated riding less than before the pandemic, with a majority (63%) citing that they were working from home more. The pandemic is still top of mind, with almost a third (32%) stating that they are riding less because of COVID concerns.
- Among all customers nearly half (48%) stated they will be riding less, with similar top reasons, 70% stating they will be working from home more and 26% citing COVID concerns.
- 45% of all customers (lapsed and current) indicated that they have used an additional/alternative mode during the pandemic, with 87% using their personal vehicle.
- Lapsed customers were more likely to indicate “Don’t know” (17%) when asked how often they will use the LIRR in the future than current customers (8%).

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: on-time performance, availability of seats, cleanliness of boarding station, electronic/LED signs at boarding station, and conductors.
 - Top five most important attributes of service where customer expectations had lower satisfaction and higher importance: the number of people panhandling/ experiencing mental illness/homelessness at destination station, cost of a ticket, customers wearing face masks or coverings, peak service frequency, and off-peak service frequency.

Key Take-aways

- The top three service and communication information sources reported by customers were: TrainTime (61%), MYmta app (47%) and the MTA.info website (33%).
- Current customers are more aware than lapsed customers for each of the features in the TrainTime mobile app. Most current customers who have used the features find it useful (91%).
- The top factors for deciding to ride LIRR in the future for lapsed customers was “social distancing on trains”. The top factors for current customers were “health and safety concerns using LIRR have been satisfied” and “cost of a ticket” .
- Lapsed and current customers anticipate less monthly ticket purchases in the future, and more usage of alternative ticket types.