



2014 Customer Satisfaction Study

Board of Directors
Jan 29, 2015



Background

Objectives

- Track trends in customer satisfaction
- Obtain feedback on specific service attributes
- Prioritize areas that need improvement



Background

Methods

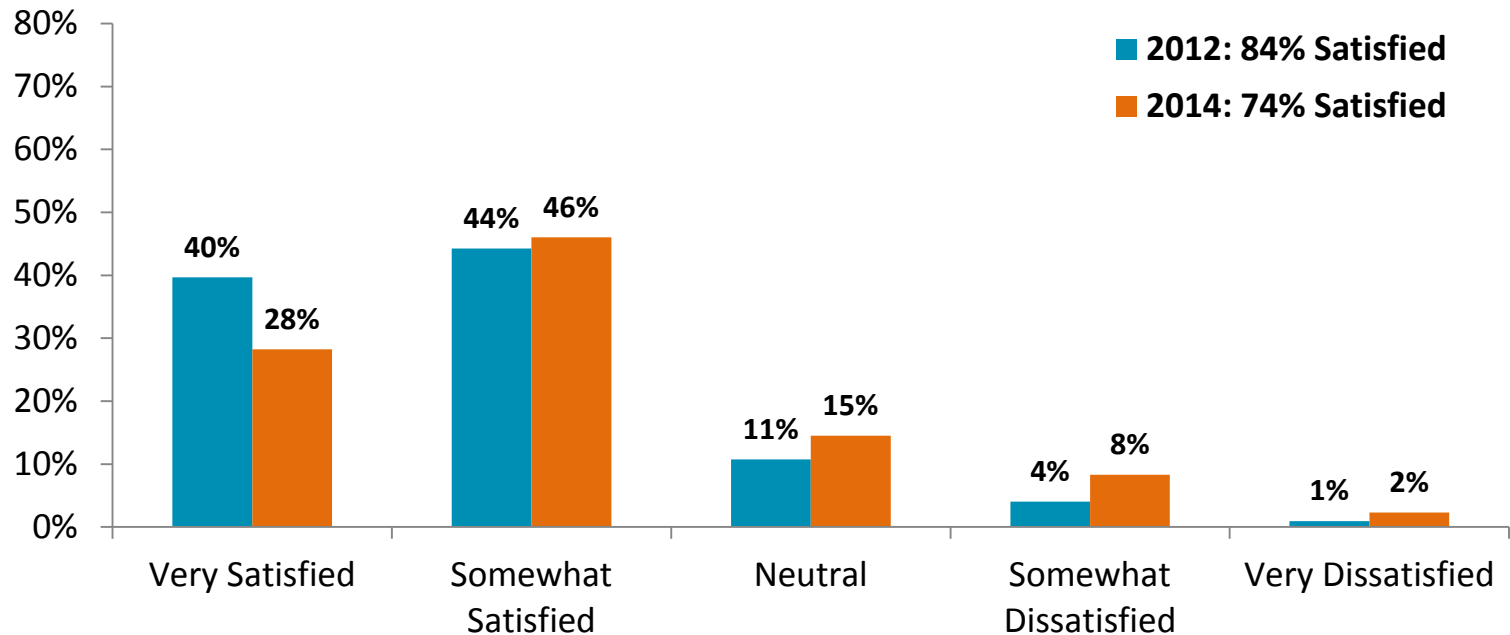
- Sampling technique
- Questionnaire
- Analysis of data



Results

Satisfaction

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



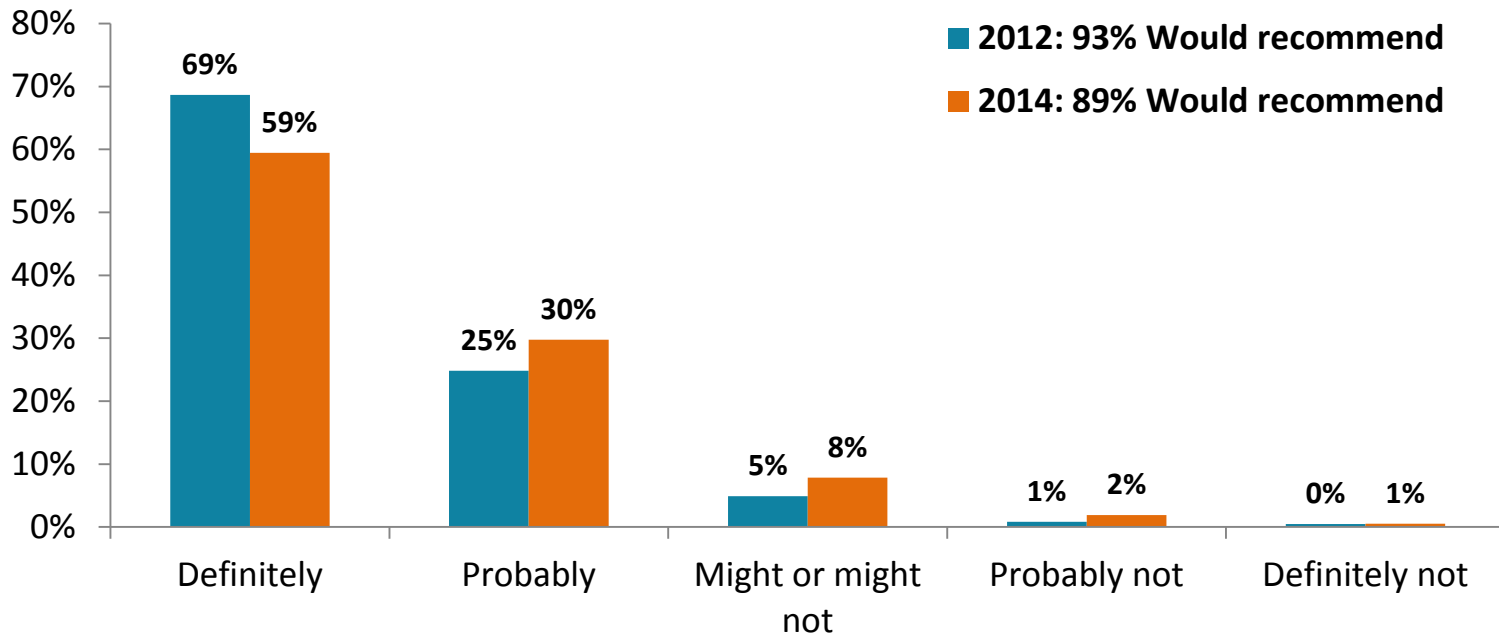
Percentages may not total 100% due to rounding



Results

Recommend to a Friend

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



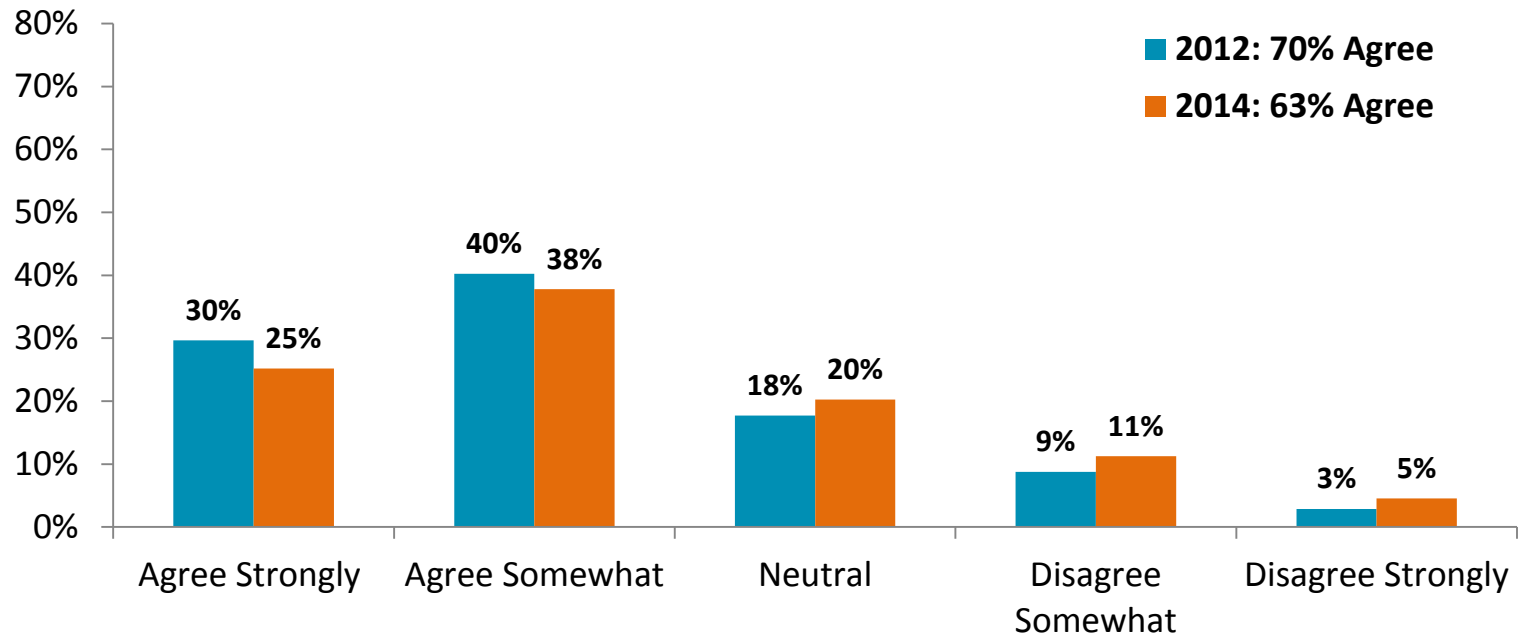
Percentages may not total 100% due to rounding



Results

Value for the Money

“BART is a good value for the money.”



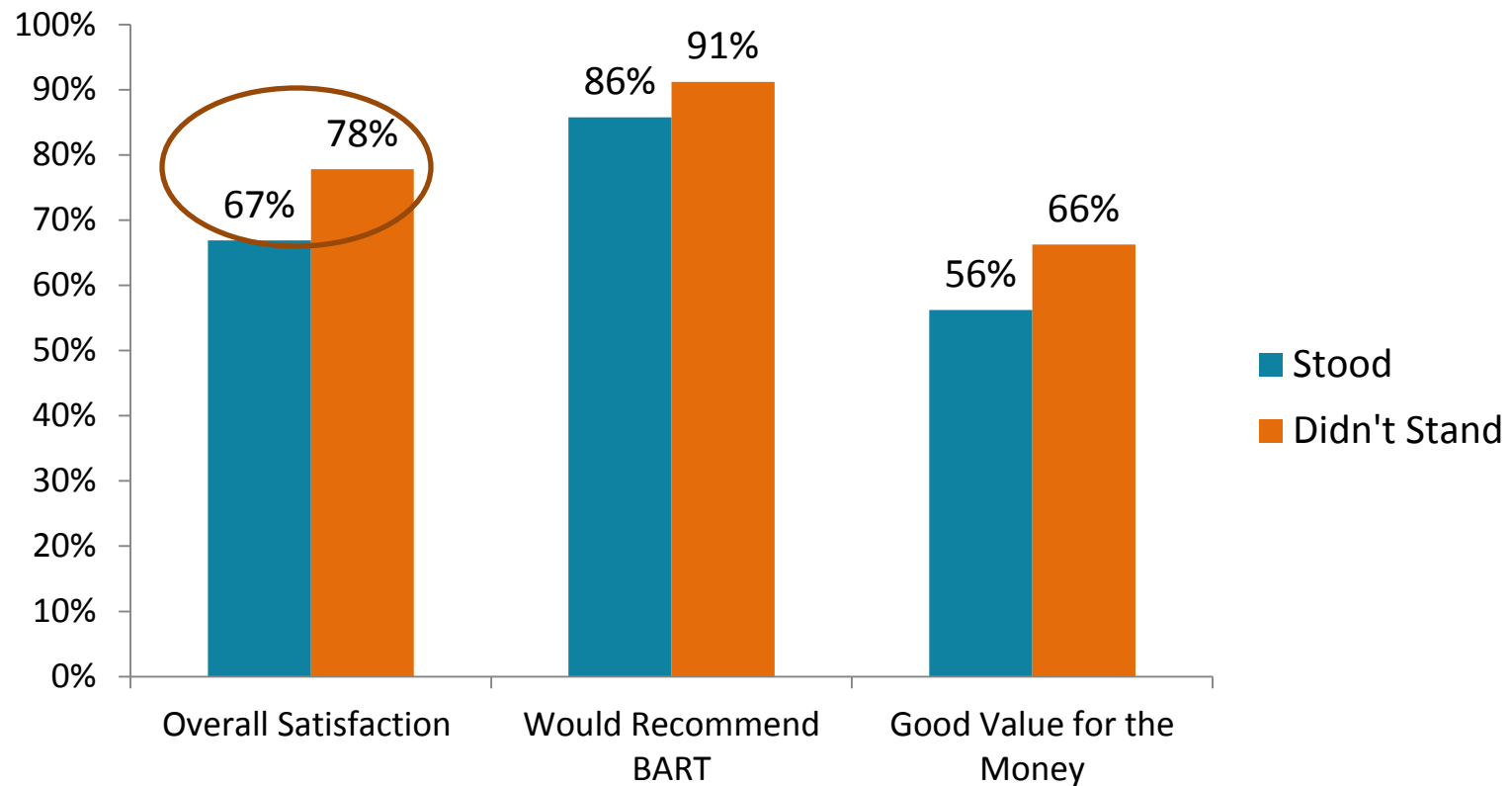
Percentages may not total 100% due to rounding



Results

Impact of Seating Availability

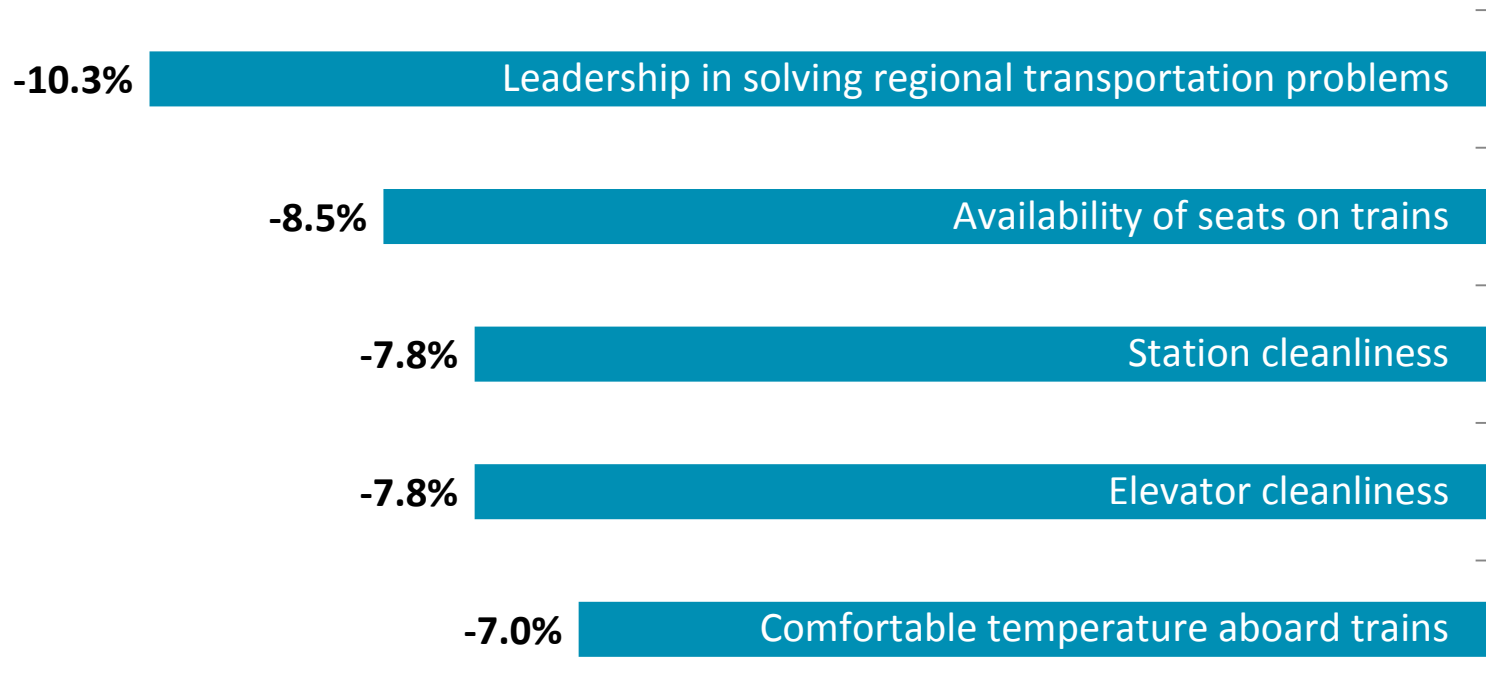
More people had to stand in 2014; among those who stood, ratings were significantly lower.



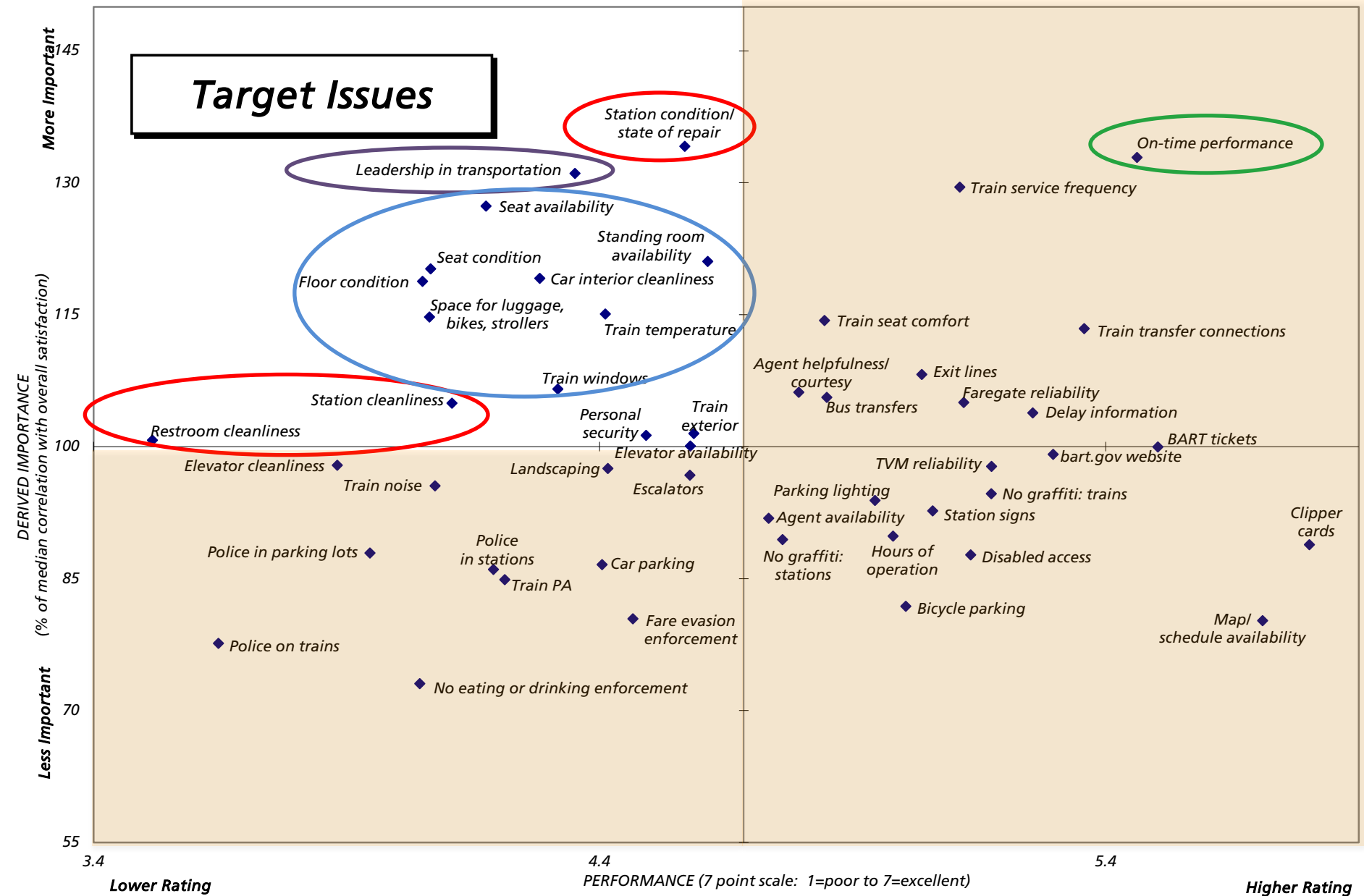


Results

Largest Changes From Prior Survey



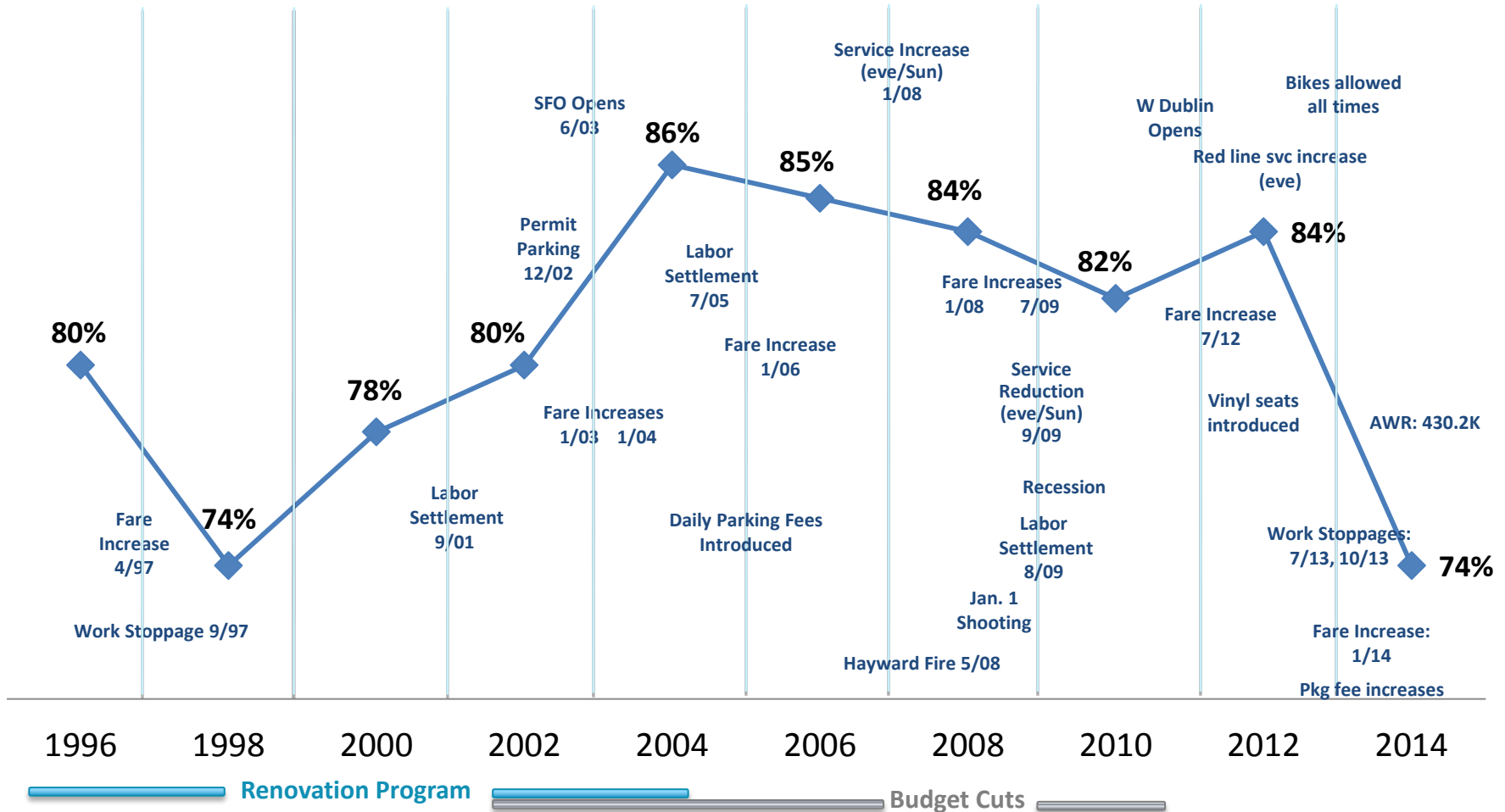
2014 QUADRANT CHART





Results

Satisfaction Trends





Historical Context

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 availability	Train cleanliness
Fare gate reliability	Personnel courtesy	Ticket refunds
Lines at exit gates	Ticket refunds	
Escalator availability	Seat availability	
Elevator availability	Train temperature	
Train cleanliness	Noise level	
Station cleanliness	PA announcements	
Station condition	Bus connections	
Personal security	Leadership in reg'l trans.	



Historical Context

Conditions prior to 1998 Survey



Worn out seats

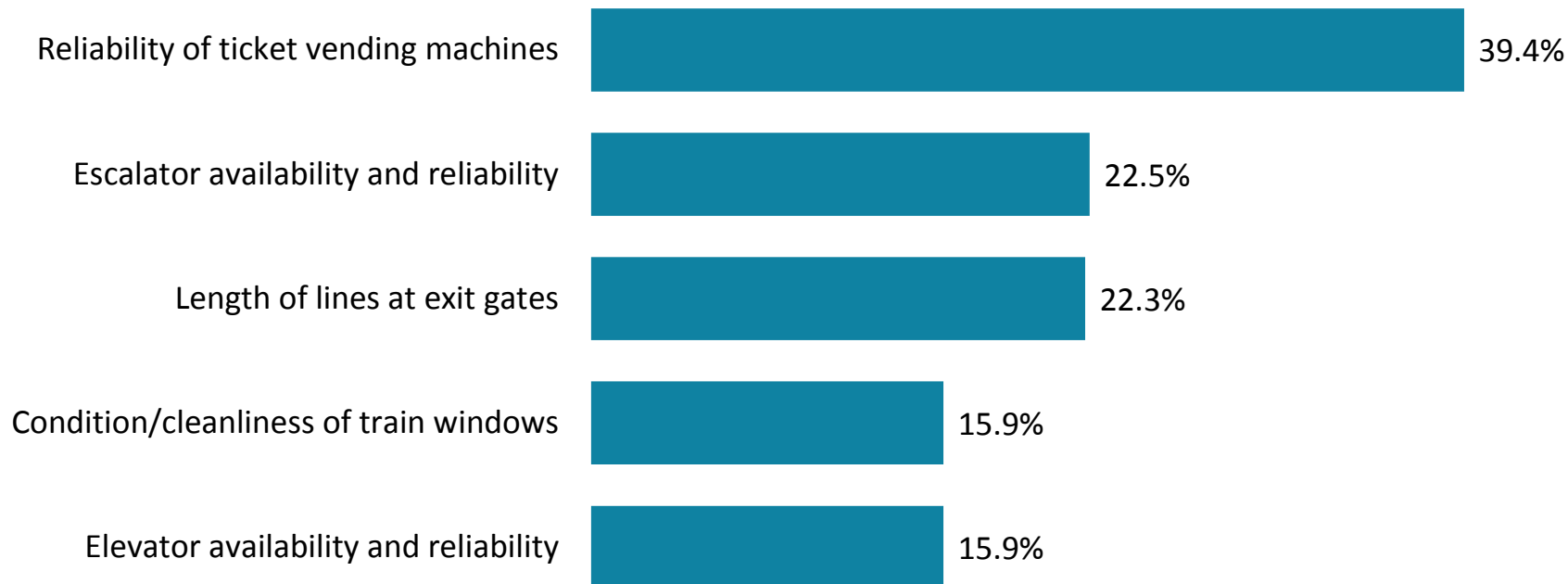
Engines out of service



Historical Context

Customer Ratings 1998 – 2004

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





Conclusion

Current initiatives & potential investments

	Attribute (% change vs. 2012)	Current Initiatives	Potential Investments
1	<ul style="list-style-type: none"> - Seat availability (-8.5%) - Availability of standing room (-5.1%) - Space for luggage, bikes, strollers (-4.5%) 	<ul style="list-style-type: none"> - Stabilization of car availability expected by July after floors are done - Contra Costa Crossover will free up 13 cars - Add yellow line shoulder service - FOF: first 10 pilot cars in service in Fall 2016. 775 cars total. - FOF cars feature wider aisles, higher seats, bike racks - Communication campaign re: near-term constraints on making trains longer 	<ul style="list-style-type: none"> - Increase shop staffing to raise car availability - Repair 6 cars currently out of service - Goal to increase new car fleet to at least 1,000 cars
2	<ul style="list-style-type: none"> - Train temperature (-7.0%) 	<ul style="list-style-type: none"> - Replace degraded electrical controls on A/B cars as units fail - Install upgraded units on all C cars 	<ul style="list-style-type: none"> - Proactive replacement of A/B car units with new electrical controls



Conclusion

Current initiatives & potential investments

	Attribute (% change vs. 2012)	Current Initiatives	Potential Initiatives
3	<ul style="list-style-type: none"> - Station cleanliness (-7.8%) - Station condition / state of repair (-5.0%) 	<ul style="list-style-type: none"> - Station brightening: 5 stations/year (Completed: Coliseum. In progress: Powell St. Next: Civic Center) - Additional station entrance and scrub crews - Escalator replacement/canopies: Phase 1 (Powell & Civic) 	<ul style="list-style-type: none"> - Expand and accelerate station brightening program - Increase System Service staffing - Expand escalator replacement/canopy program. Phase 2 covers 12 more stations
4	<ul style="list-style-type: none"> - Car interior cleanliness (-4.7%) - Condition/cleanliness of seats (-2.6%) 	<ul style="list-style-type: none"> - All upholstered seat covers replaced with vinyl (Completed Dec 2014) 	<ul style="list-style-type: none"> - EOL cleaning crew at Pitts/Bay Point - Extend EOL crews at Millbrae, Richmond, Daly City until 9 pm
5	<ul style="list-style-type: none"> - Car floor condition (-5.4%) 	<ul style="list-style-type: none"> - All carpeted floors to be replaced with hard surface by 6/30/15 	
6	<ul style="list-style-type: none"> - On-time performance (-4.5%) 	<ul style="list-style-type: none"> - Contra Costa Crossover 	<ul style="list-style-type: none"> - Increase Mainline Technician and Paramedic coverage - Additional OCC staffing



Conclusion

Summary

- Satisfaction is down significantly vs. two years ago.
- High ridership and an aging infrastructure are stressing the BART system. This underscores the importance of current initiatives to modernize and increase the capacity of BART stations and trains.
- Initiatives to build a better BART system are underway in ten key areas, and staff are proposing additional investments for consideration by the Board in the upcoming budget.
- BART's experience from 1998-2004 shows that investment in Quadrant Chart Target Issues can yield dramatic satisfaction improvements.
- To avoid satisfaction peaks and valleys in the future, a more sustained program of reinvestment in the core system is needed.



End of Presentation

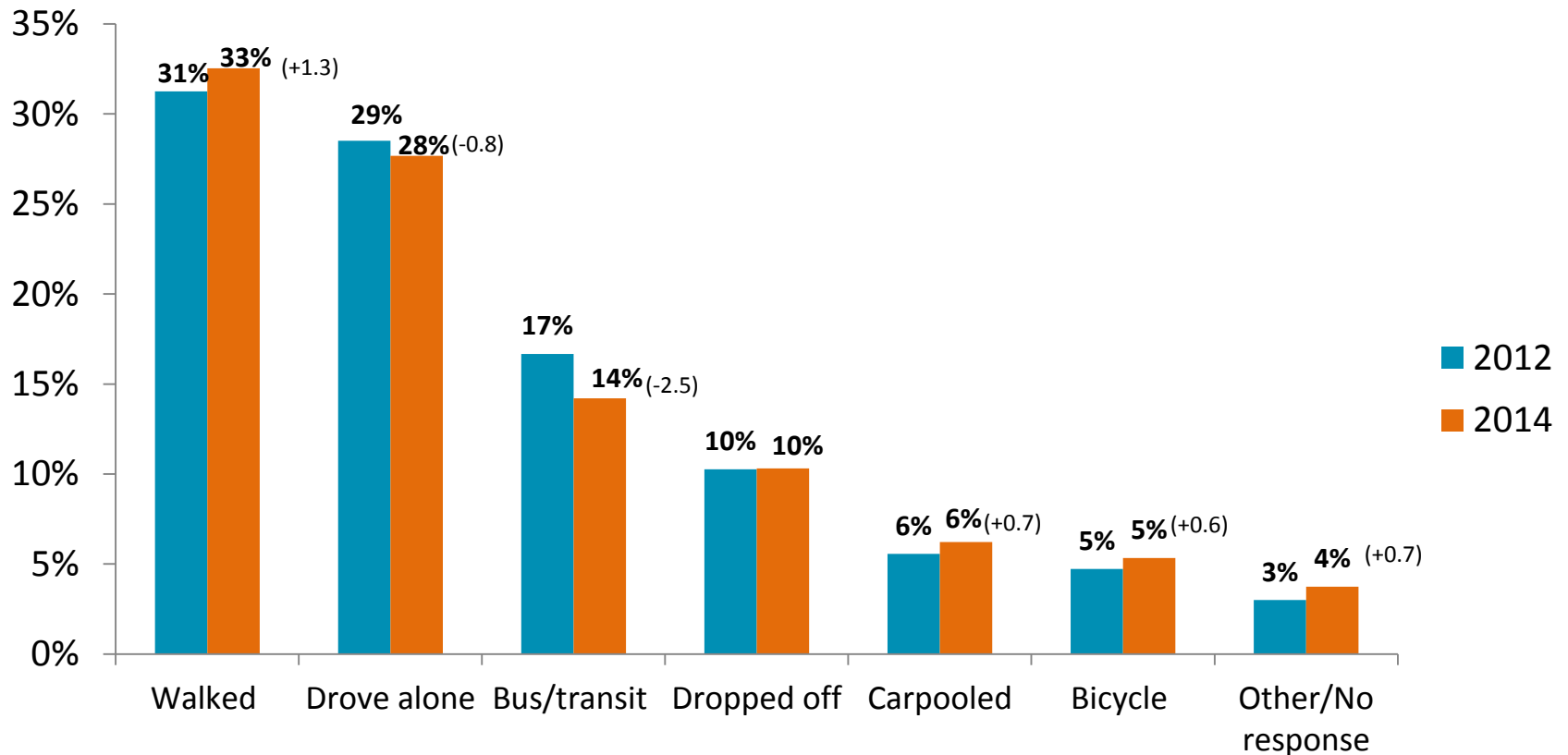


Appendix



Appendix

Access from home to BART





Appendix

BART Customer Demographics

BART customers' ethnicities reflect the diversity of the region.

