2023 DART Customer Satisfaction Survey Results

Nevin Grinnell
Marketing VP - CMO

DART *let's go.*

Executive Summary

All key metrics improved in 2023, especially among our core riders

- Satisfaction and NPS for dependent riders exceeded choice riders in 2023

- DART's longer-tenured customers and multi-modal (bus+rail) customers reported higher improvements

- Please note: most of the action items affecting Cleanliness, Security and Reliability were put in-place January 2023

Performance improved across all drivers of satisfaction, more for timeliness and safety (at DART facilities, in parking lots)

GoLink safety is also important, as are conditions and accessibility of locations.

The trend is looking favorable, and consistency with our efforts regarding Security, Cleanliness, and Reliability are key

DART *let's go.*

Objectives and Methodology

Objectives and methodology

- This survey is a tracking study that monitors shifts in customer satisfaction over time.

    – Conducted annually since 2012 (except in 2020 due to COVID)

- Survey was executed June and July

- Data collection methods

    – Paper surveys and QR code option for onboard intercepts

    – Online surveys

        o Promoted through GoPass, DART website, email, and social media

DART *let's go.*

Sample Size & Weighting

- 6,493 qualified responses (margin of error in reported results: +/- 1.25%)
  - Political poll survey between 500 – 1000 usually with a margin of error or 3 or greater
- 70% of the survey must be answered including the following key questions:
  - Q1) Available means of transportation, Q8) Services typically used, Q9) Frequency of DART usage.
  - Q20) Gender, Q21) Age, Q22) and Q23) Ethnicity
- Data is weighted by age, ethnicity, and income.

Total Sample Sizes by Year		
	Unweighted	Weighted
2012	5700	5207*
2014	6025	5433*
2015	5837	5421*
2016	2918	2837*
2017	5853	5853
2018	3596	3596
2019	6585	6585
2021	6676	6676
2022	6185	6185
2023	6493	6493

Ethnicity (2022)		
	Unweighted	Weighted
African Am	44%	51%
Hispanic	21%	21%
White/Other	36%	28%

Income (2022)		
	Unweighted	Weighted
< 25K	48%	47%
$25K-$50K	23%	28%
>$50K	24%	13%
Don't know / no answer	6%	13%

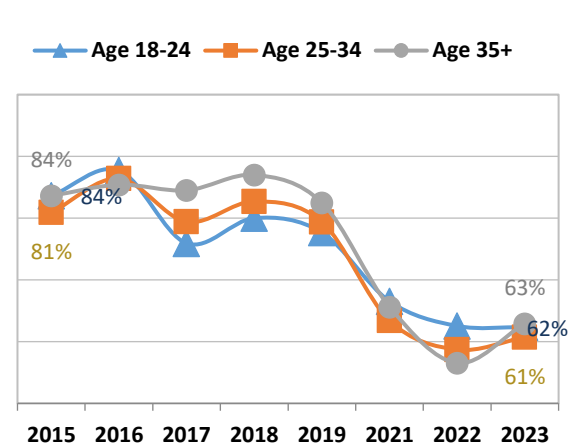| Age (2022)		
	Unweighted	Weighted
18-24	17%	17%
25-34	26%	19%
35-44	41%	40%
55+	15%	23%

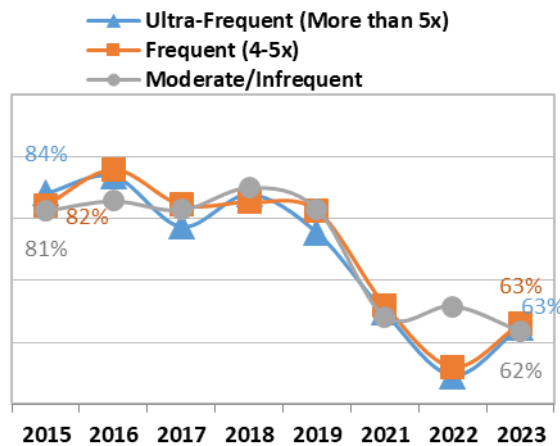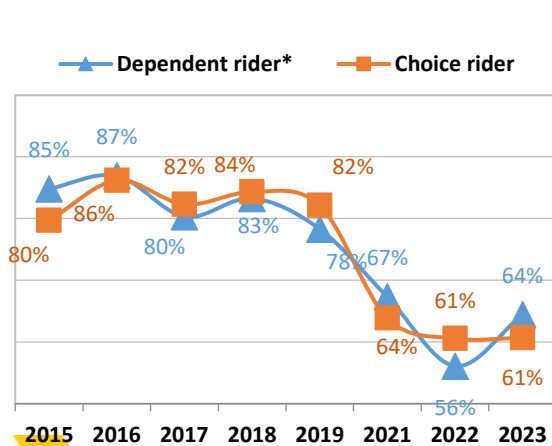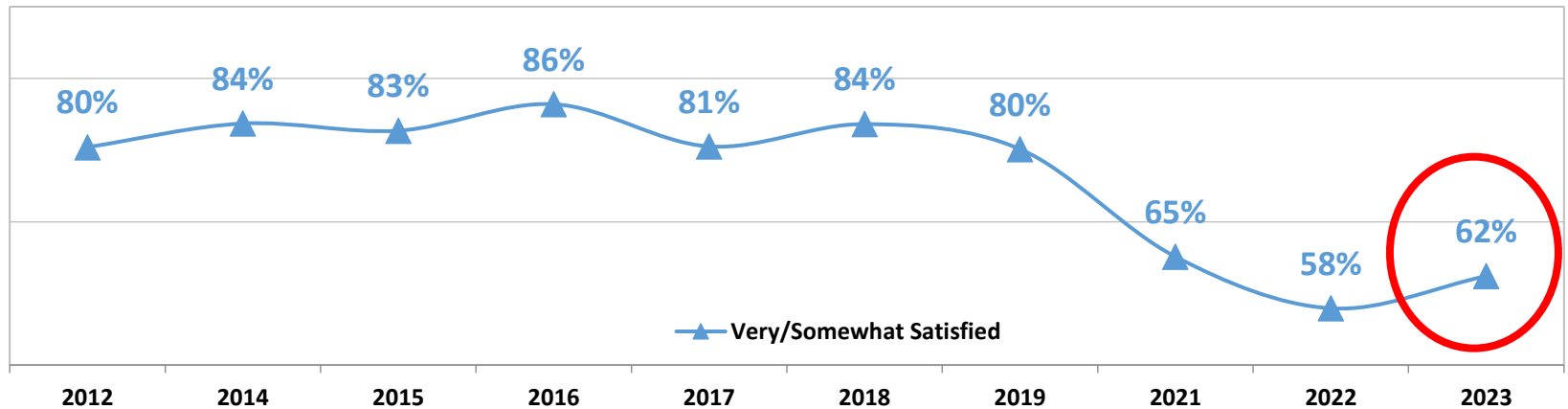**DART** *let's go.*

*Note: Due to missing data, the overall sample sizes available for weighting were smaller than the previously reported, unweighted sample sizes.

Topline Satisfaction Metrics

Overall satisfaction improved in 2023, reversing a declining trend

Q13. Overall, how satisfied are you with the services provided by DART? (5-point scale, *Very satisfied* to *Not at all satisfied*)

Likelihood to Continue Using DART rose in 2023

Very/Somewhat likely: 86% (2012), 88% (2014), 85% (2015), 86% (2017), 87% (2019), 74% (2021), 71% (2022), 79% (2023)

Dependent rider / Choice rider chart (2015–2023):
- Dependent rider: 87%, 86%, 87%, 77%, 74%, 82%
- Choice rider: 81%, 87%, 87%, 71%, 68%, 75%

Ultra-Frequent (More than 5x) / Frequent (4-5x) / Moderate/Infrequent chart:
- Ultra-Frequent: 87%, 82%
- Frequent: 84%, 79%
- Moderate/Infrequent: 81%, 74%

Age 18-24 / Age 25-34 / Age 35+ chart:
- Age 18-24: 82%, 73%
- Age 25-34: 83%, 77%
- Age 35+: 88%, 81%

Q14. How likely are you to continue using DART in the future? (5-point scale, *Very likely* to *Not at all likely*)

8

DART's Net Promoter Score rebounded after a decline in 2022

Q15. On a scale of 0 to 10, how likely are you to recommend using DART to friends or family members? (11-point scale, 0 to 10, *Extremely Likely* to *Not At All Likely*)
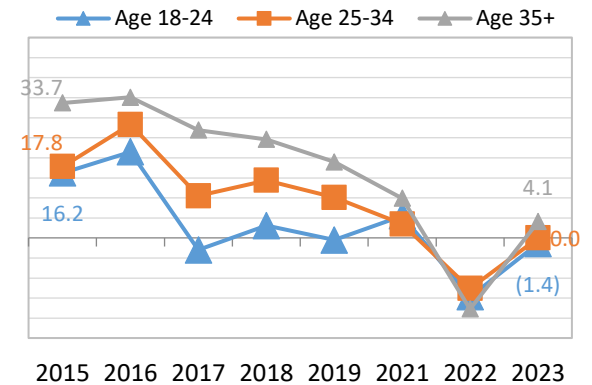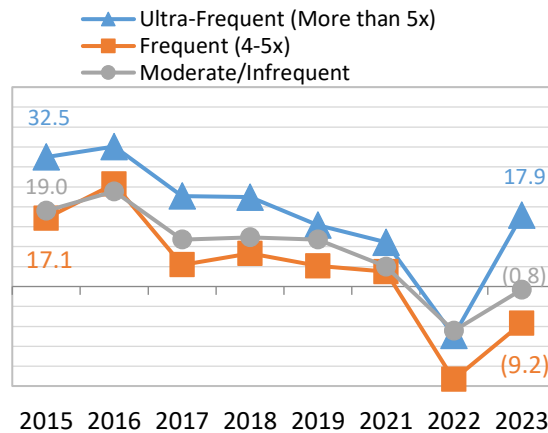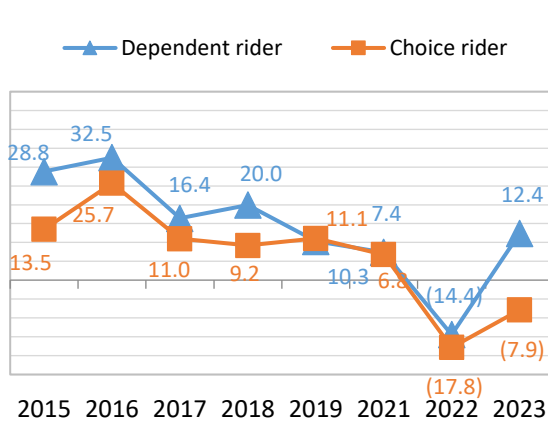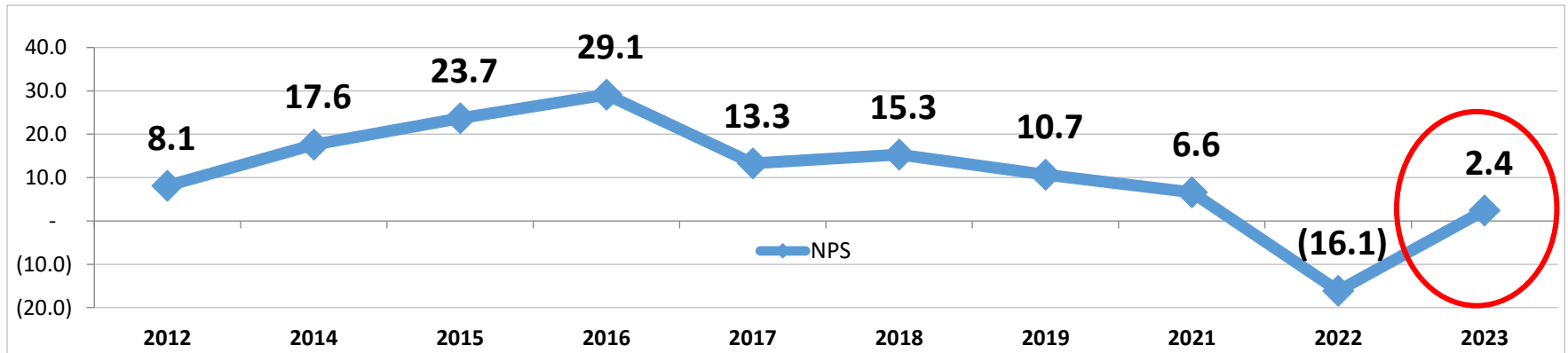
Security, Panhandlers, and Frequency are the most desired improvements

Open-ended responses

How DART can Improve

Category	%
More/effective police/fare enf (Safety)	30%
Remove panhandlers and rude people	14%
More frequency	12%
Nicer drivers	8%
More cleaning of trains/buses/facilities	6%
Reliability (timeliness, stopping, not leaving early)	5%
More/better Go Link service / Clarity / Reservation	5%
More coverage	4%
Lower fares	4%
Amenities onboard (charging stations, WiFi)	3%
Newer / clean seats	2%
Go Pass app, status updates / tracking	2%
More support for disabled riders / paratransit	2%
Better stops / stations	1%
Better connections/less wait	1%
Fix TVMs/kiosks/ farbox	1%
DART is doing well	4%
No comments	21%

Other feedback (<1%): more maintenance, more drivers, better signage

What riders like most about DART
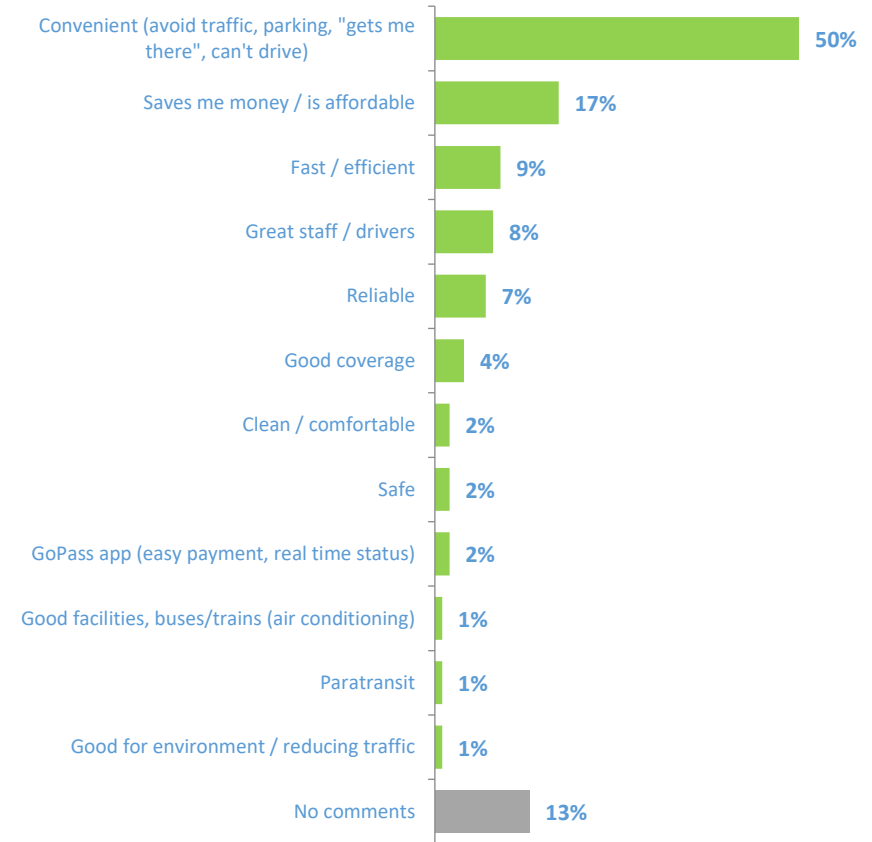
Category	%
Convenient (avoid traffic, parking, "gets me there", can't drive)	50%
Saves me money / is affordable	17%
Fast / efficient	9%
Great staff / drivers	8%
Reliable	7%
Good coverage	4%
Clean / comfortable	2%
Safe	2%
GoPass app (easy payment, real time status)	2%
Good facilities, buses/trains (air conditioning)	1%
Paratransit	1%
Good for environment / reducing traffic	1%
No comments	13%

Key Driver Analysis

Timeliness is now a strength, security is an area of opportunity

Derived importance vs. DART performance on them
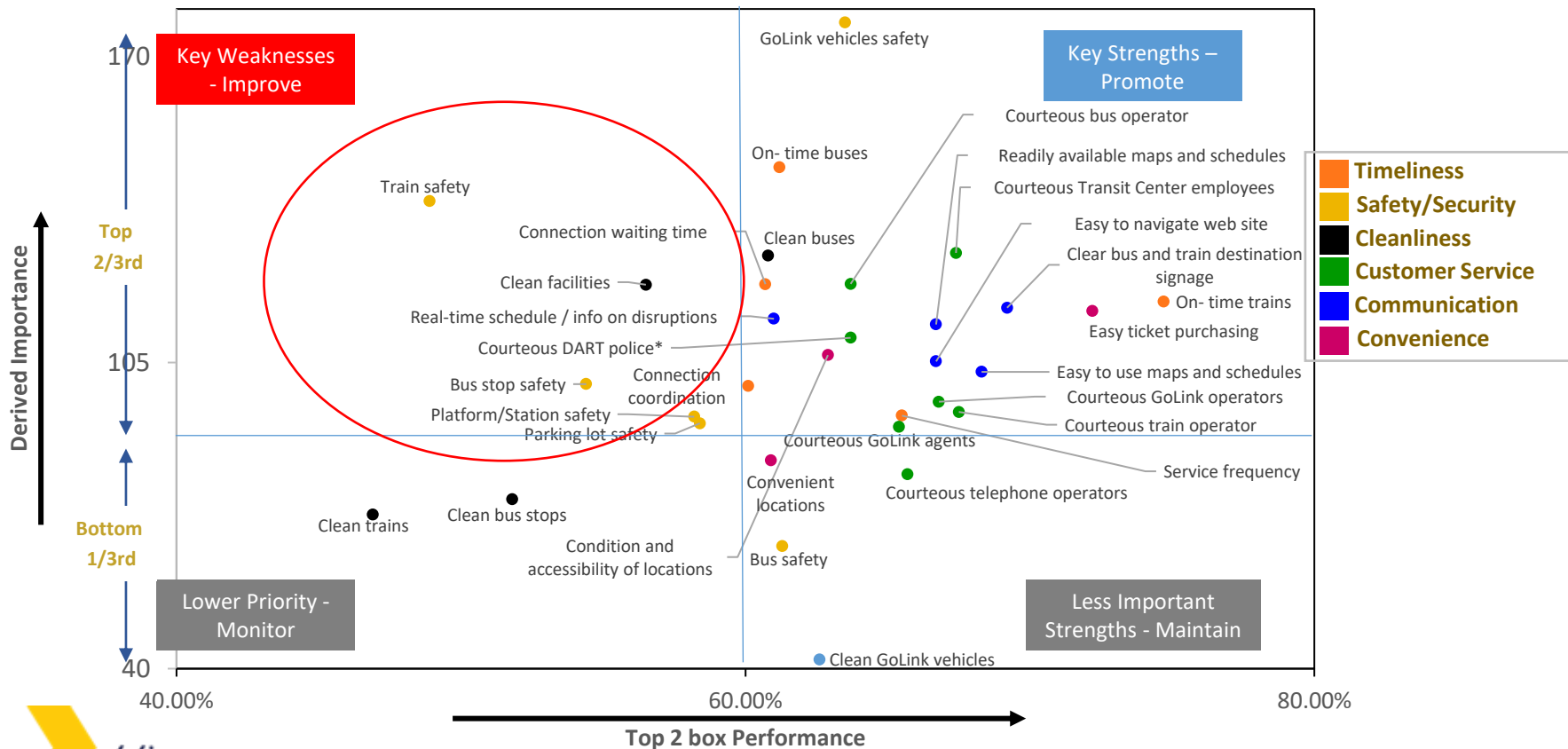
Drivers of Satisfaction

Timeliness, Cleanliness, Safety, Convenience and Customer Service

DART's rating for timeliness improved across all measures

Timeliness
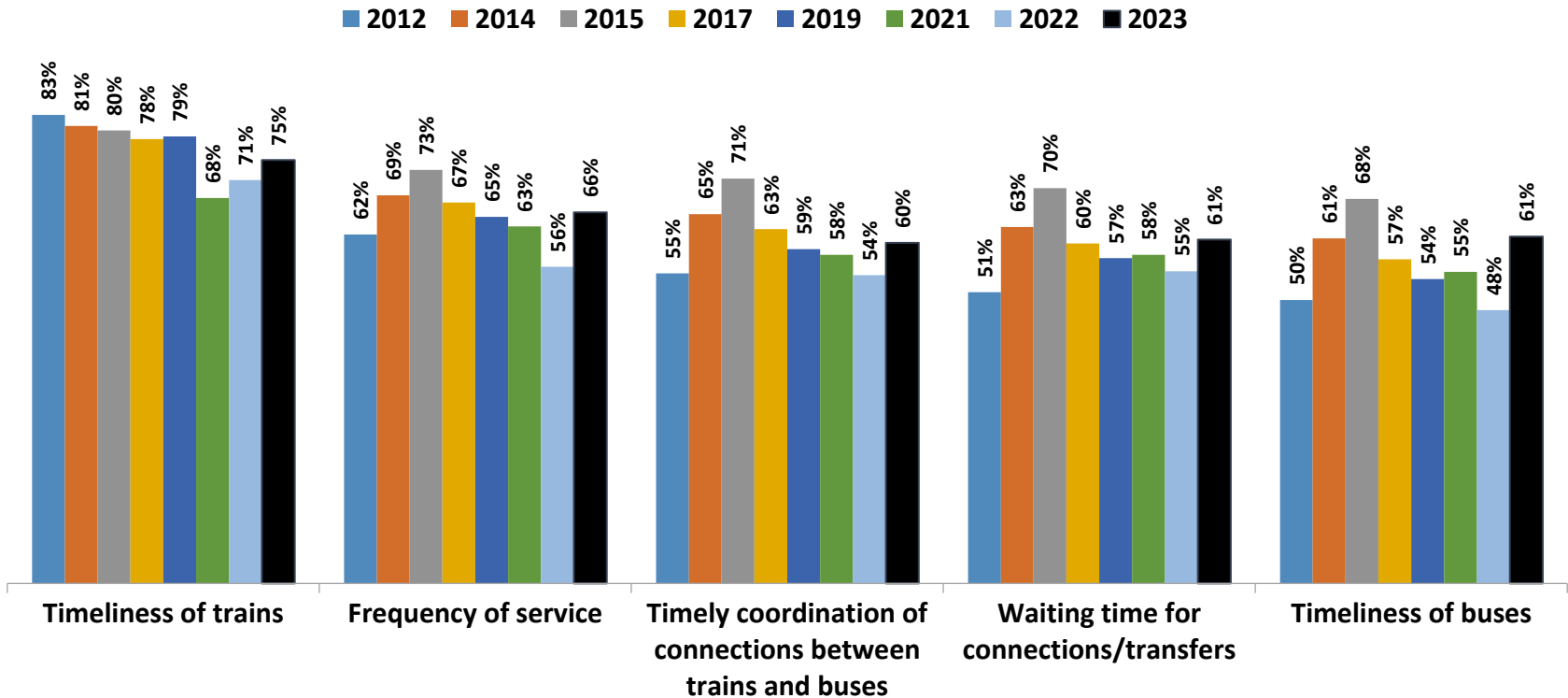
■ 2012 ■ 2014 ■ 2015 ■ 2017 ■ 2019 ■ 2021 ■ 2022 ■ 2023

	2012	2014	2015	2017	2019	2021	2022	2023
Timeliness of trains	83%	81%	80%	78%	79%	68%	71%	75%
Frequency of service	62%	69%	73%	67%	65%	63%	56%	66%
Timely coordination of connections between trains and buses	55%	65%	71%	63%	59%	58%	54%	60%
Waiting time for connections/transfers	51%	63%	70%	60%	57%	58%	55%	61%
Timeliness of buses	50%	61%	68%	57%	54%	55%	48%	61%

DART *let's go.*

Note: This question was not asked in 2016.
Q27. How would you rate DART's performance on the following criteria?

14

Cleanliness improved overall and significantly for DART facilities

Cleanliness

Legend: 2012, 2014, 2015, 2017, 2019, 2021, 2022, 2023

DART Facilities (stations, transit centers): 64%, 70%, 71%, 63%, 59%, 45%, 45%, 57%

Buses: 44%, 63%, 68%, 61%, 58%, 48%, 58%, 61%

Bus stops: 52%, 65%, 68%, 60%, 55%, 44%, 50%, 52%

Trains: 64%, 68%, 68%, 56%, 53%, 43%, 45%, 47%

GoLink vehicles #: 63% *(Added in 2023)*

Q27. How would you rate DART's performance on the following criteria?

15
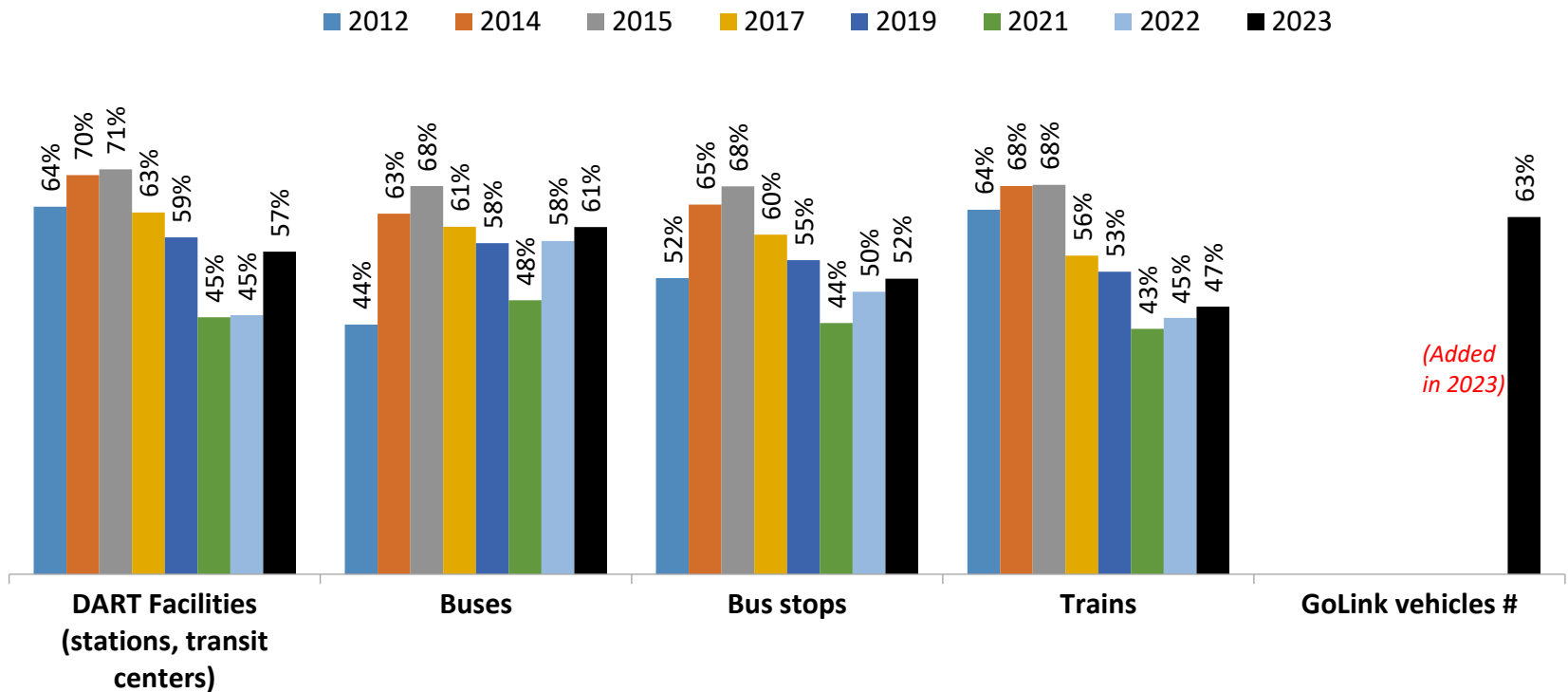
Security scores improved slightly at DART facilities and parking lots

Security

Legend: ■ 2012 ■ 2014 ■ 2015 ■ 2017 ■ 2019 ■ 2021 ■ 2022 ■ 2023

On DART buses: 68%, 74%, 74%, 72%, 69%, 53%, 61%, 61%

At DART facilities (stations, transit centers) *: 70%, 73%, 71%, 68%, 62%, 50%, 50%, 58%

On DART trains: 75%, 75%, 73%, 68%, 64%, 49%, 50%, 49%

In DART parking lots: 66%, 71%, 71%, 68%, 64%, 51%, 54%, 58%

At bus stops: 57%, 68%, 69%, 65%, 61%, 51%, 53%, 54%

DART police presence **: 72%, 71%, 70%, 64%, 63%, 51%, 43%

On DART GoLink vehicles: 64% *(Added in 2023)*
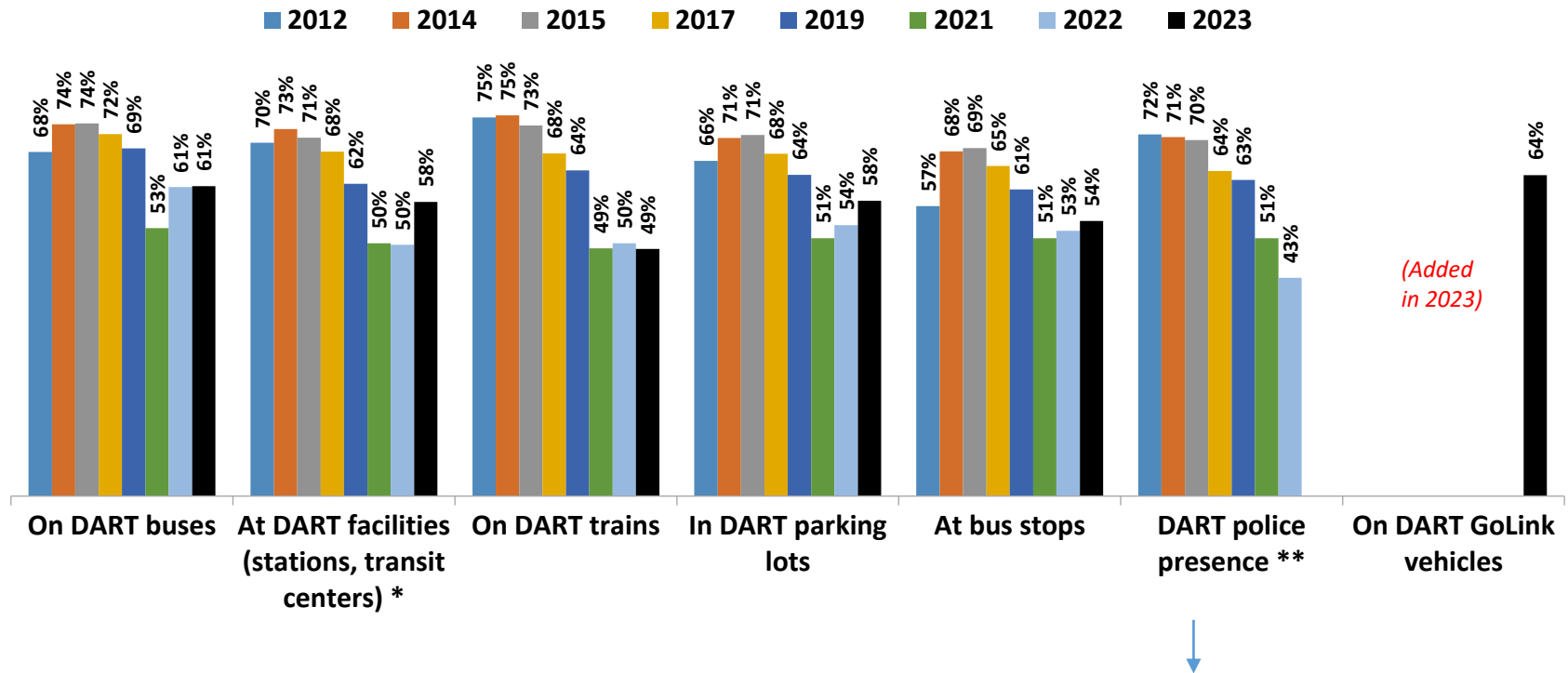
** Question was asked differently in 2023: How satisfied are you with the presence of DART personnel when using DART?

* Updated to include facilities other than platforms in 2023;
Q27. How would you rate DART's performance on the following criteria?

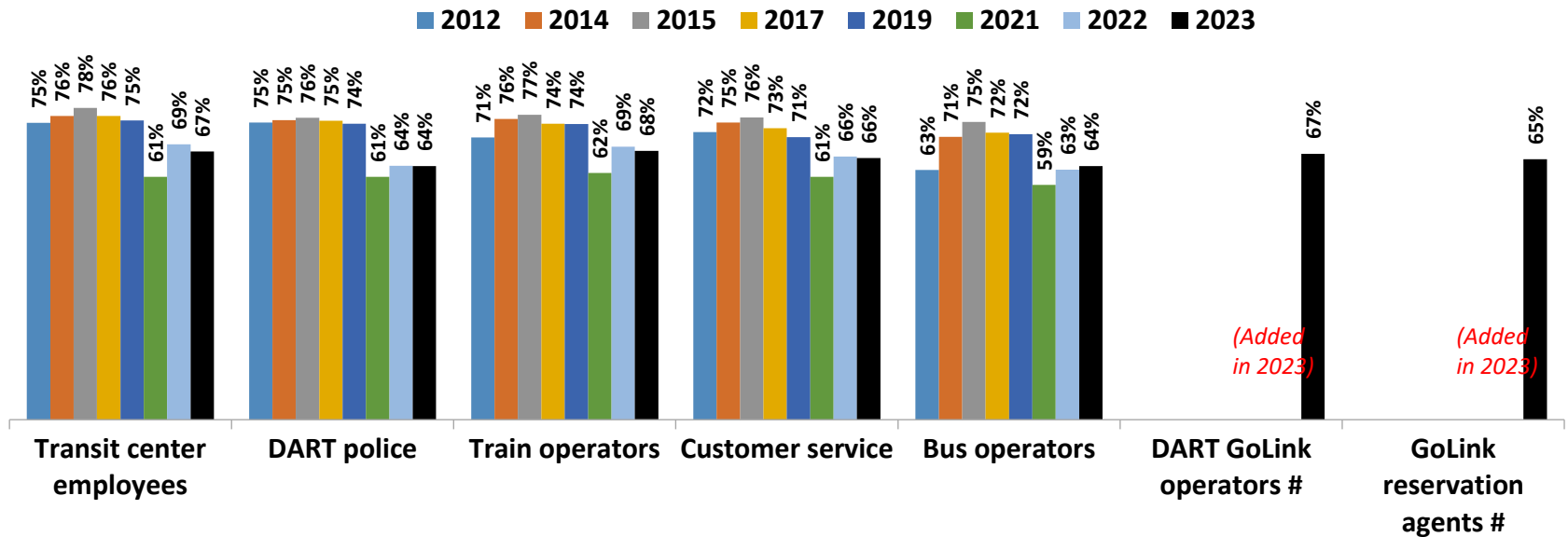# Performance on customer service is stable versus year-ago

Customer Service

Legend: 2012, 2014, 2015, 2017, 2019, 2021, 2022, 2023

Transit center employees: 75%, 76%, 78%, 76%, 75%, 61%, 69%, 67%

DART police: 75%, 75%, 76%, 75%, 74%, 61%, 64%, 64%

Train operators: 71%, 76%, 77%, 74%, 74%, 62%, 69%, 68%

Customer service: 72%, 75%, 76%, 73%, 71%, 61%, 66%, 66%

Bus operators: 63%, 71%, 75%, 72%, 72%, 59%, 63%, 64%

DART GoLink operators #: (Added in 2023) 67%

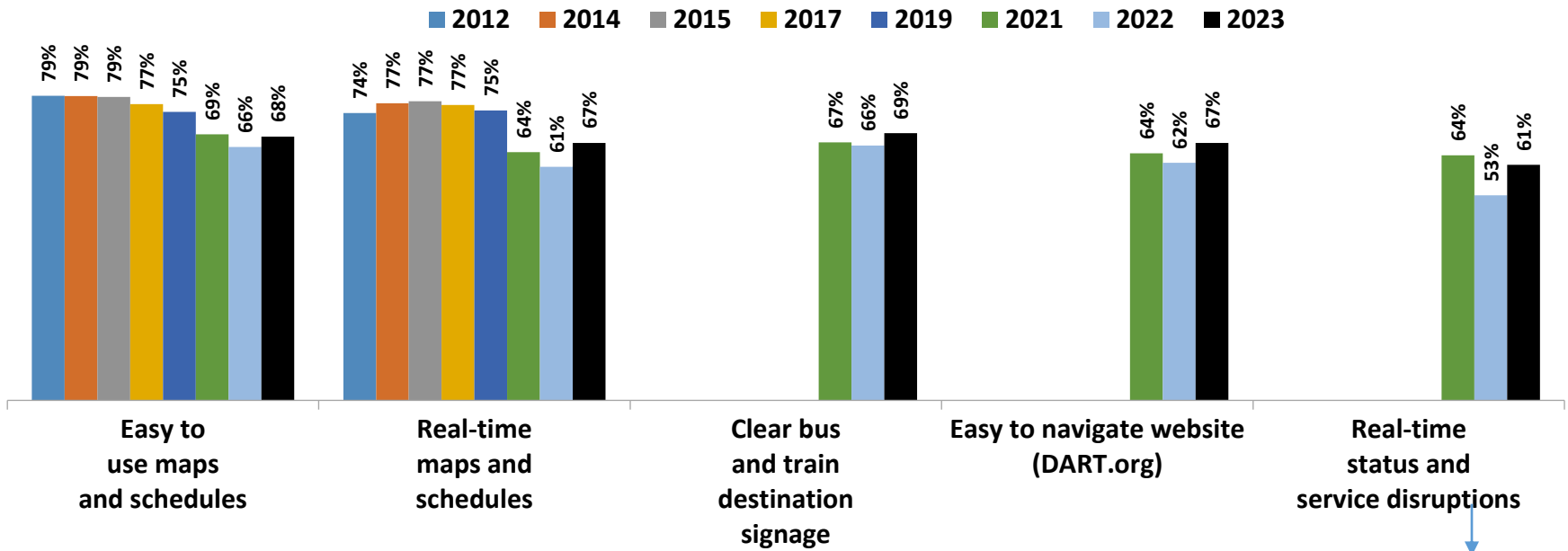**GoLink reservation agents #:** (Added in 2023) 65%

New criteria added in 2023
Q27. How would you rate DART's performance on the following criteria?

DART Communication performance improved slightly across all measures

Communication

Legend: ■ 2012 ■ 2014 ■ 2015 ■ 2017 ■ 2019 ■ 2021 ■ 2022 ■ 2023

Easy to use maps and schedules: 79%, 79%, 79%, 77%, 75%, 69%, 66%, 68%

Real-time maps and schedules: 74%, 77%, 77%, 77%, 75%, 64%, 61%, 67%

Clear bus and train destination signage: 67%, 66%, 69%

Easy to navigate website (DART.org): 64%, 62%, 67%
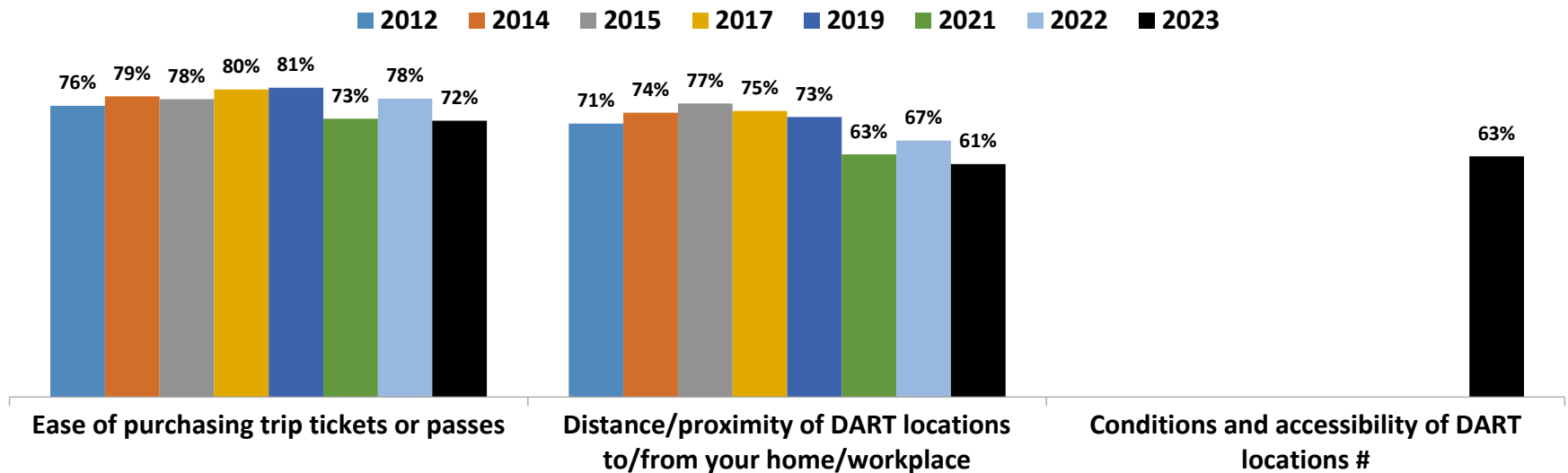
Real-time status and service disruptions: 64%, 53%, 61%

Note: This question was not asked in 2016.
Q27. How would you rate DART's performance on the following criteria?

The ratings for convenience attributes declined slightly

Convenience

Legend: ■ 2012 ■ 2014 ■ 2015 ■ 2017 ■ 2019 ■ 2021 ■ 2022 ■ 2023

Ease of purchasing trip tickets or passes
- 2012: 76%
- 2014: 79%
- 2015: 78%
- 2017: 80%
- 2019: 81%
- 2021: 73%
- 2022: 78%
- 2023: 72%

Distance/proximity of DART locations to/from your home/workplace
- 2012: 71%
- 2014: 74%
- 2015: 77%
- 2017: 75%
- 2019: 73%
- 2021: 63%
- 2022: 67%
- 2023: 61%

Conditions and accessibility of DART locations #
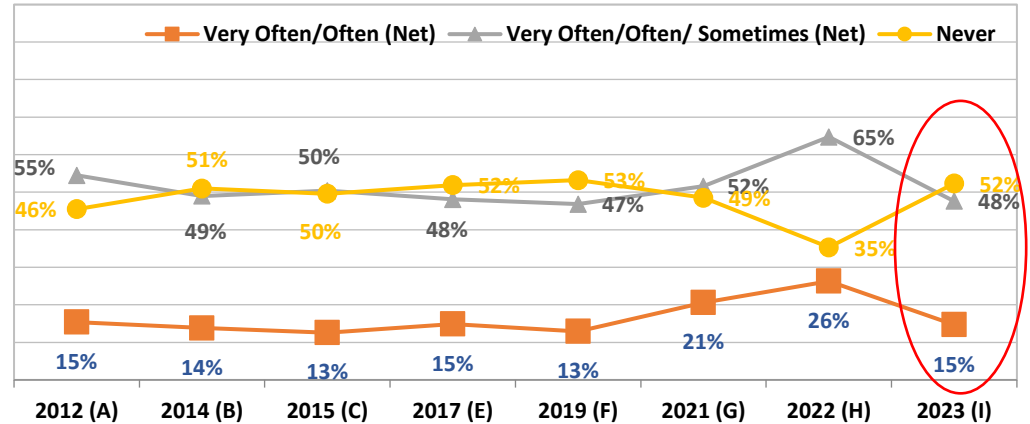- 2023: 63%

New criteria added in 2023
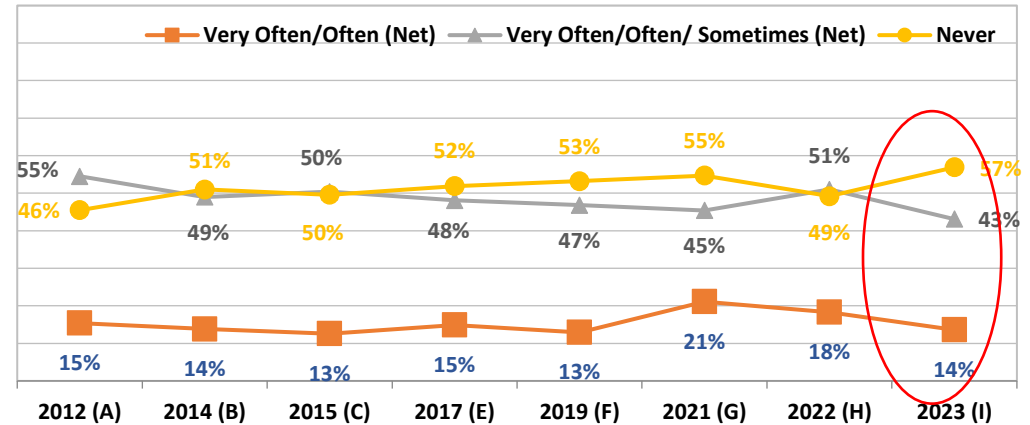Q27. How would you rate DART's performance on the following criteria?

The perception of buses not showing up/not stopping improved significantly

In the past 6 months, how often have you experienced a problem with your bus not showing up at all?
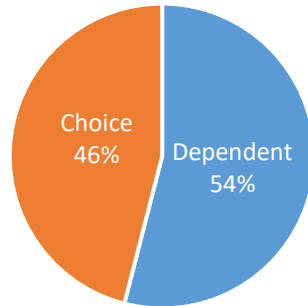

In the past 6 months, how often have you experienced a problem with your bus not stopping to pick you up?
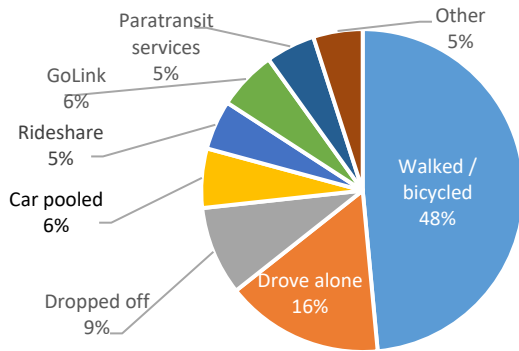

New in 2023: How often experience problems with bus leaving early from stop?   20% Very Often/Often; 48% Never

Trip details and usage of DART in 2023

Dependence on DART

- Choice 46%
- Dependent 54%

Means of travel to DART location

- Walked / bicycled 48%
- Drove alone 16%
- Dropped off 9%
- Car pooled 6%
- Rideshare 5%
- GoLink 6%
- Paratransit services 5%
- Other 5%

No. of connections one-way
(counting current trip, including GoLink)

- One 30%
- Two 42%
- Three or more 28%

Services usually used

- Bus — 70%
- DART Rail — 77%
- TRE — 16%
- Trinity Metro — 6%
- DCTA — 4%
- GoLink — 20%
- Dallas Streetcar — 6%
- Paratransit services — 5%
- McKinney Avenue Trolley — 4%
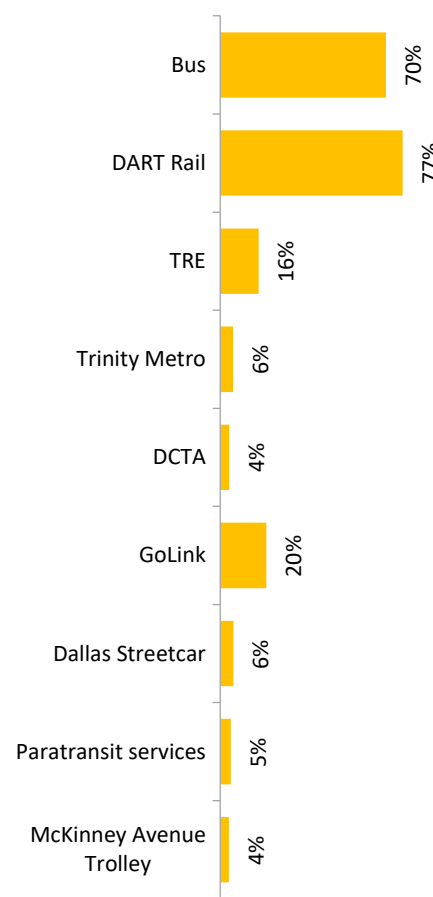
Awareness of services

- Express Services/Rapid Ride — 38%
- GoLink — 55%
- Love Link — 19%
- TRE - Trinity Railway Express — 48%
- Silver Line — 10%
- Dallas Streetcar — 24%
- Paratransit services # — 22%
- McKinney Avenue Trolley # — 15%

DART. let's go.
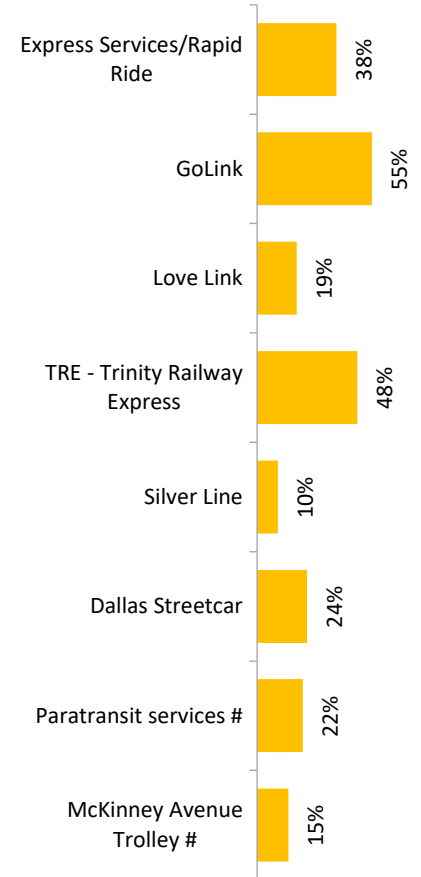
Next Steps

- Continue action items to affect Cleanliness, Security and Reliability to drive satisfaction

  – Maintain consistency – easier for scores to decline and slower to increase

- Look to execute the Customer Satisfaction survey May/June vs. June/July

  – Minimize summer heat

  – Better capture higher education

- Consider new questions within the survey

  – Fare/Value

  – Incremental GoLink questions

  – DART presence

DART *let's go.*

THANK YOU!

Appendix:
Respondent details,
additional charts

Changes to data collection in 2023: online surveys

Onboard data collection was augmented:

1. Onboard QR code option (respondents could complete survey on their devices, while riding)

2. Online survey promoted through GoPass, DART website, email and social media (riders could complete survey at their leisure)

Focus on Spanish-speaking riders, using bi-lingual staff and Hispanic-heavy routes

Four datasets collected (three were used for analysis)

Dataset	Used?	Sample size	% of total
#1. Onboard paper survey	Y	4,481	69%
#2. (NEW) Onboard QR code	Y	362	6%
#3. (NEW) Online survey - GoPass	Y	1,650	25%
TOTAL sample (1+2+3)		6,493	
#4. (NEW) Online survey (other sources besides GoPass)	N	1,518	N/A

Benefits

- Increase data collection efficiency
- Boost feedback from less responsive segments
- Minimize data entry issues with paper surveys
- Feedback from unacculturated ethnic minorities

Potential implications

- Potential trend breaks due to new data sources
- Variations in responses due to survey environment (while riding vs. at desk)
- Potential for double counting (onboard and GoPass)

All results in this report are based on combined data from these three datasets: (1) Onboard paper surveys, (2) Onboard QR Code and (3) Online survey of GoPass users

Sample collection by bus route and rail line

N = 6,493	10-Minute	Jun 5 – Jul 21, 2023
DART Riders	Survey	Data-Collection Dates

Recruitment: In-person interviews were done at key connection centers via pencil/paper and tablets.
Unweighted Percentages By Route Detailed Below (Showing 0.1% Or Greater)

Rail line	Online n=300	Paper n=2,459
Green	33%	30%
Red	26%	25%
Blue	21%	23%
Orange	19%	23%

Bus route	Online n=57	Paper n=1,981
1	2%	1%
3	2%	2%
5	---	3%
9	---	7%
13	2%	4%
15	---	3%
16	18%	3%
17	2%	2%
18	7%	6%
20	---	4%
22	16%	5%
23	2%	1%
25	---	1%
27	---	0%

Bus route	Online n=57	Paper n=1,981
30	---	1%
38	2%	3%
41	---	---
45	---	0%
47	---	1%
57	4%	6%
101	2%	3%
103	2%	0%
104	---	1%
105	---	1%
106	---	1%
108	2%	1%
109	---	2%
114	---	0%
200	---	1%
202	---	1%
214	---	0%
218	---	---
220	---	---
221	4%	---

Bus route	Online n=57	Paper n=1,981
222	---	1%
224	---	1%
227	7%	2%
229	---	1%
230	4%	7%
231	2%	0%
232	---	---
233	2%	0%
235	---	0%
236	---	0%
237	2%	1%
238	---	---
239	---	2%
240	2%	---
241	4%	0%
245	---	0%
247	---	1%
249	4%	0%
442	---	1%
883	12%	9%
Other	---	13%

Respondent criteria: DART riders selected at random, willing to take survey

Data collection process – key activities (services provided by CMI)

Collection

All riders were randomly selected thus removing interviewer bias and ensuring coverage by boarding along each route

Data collectors offered Paper and QR code options to respondents. Most riders chose the paper version.

A large number of riders said they completed the survey on GoPass (electronically). It is likely that this group of riders may have chosen the QR Code/electronic option if available.

Language - Surveys were provided in both Spanish and English

Challenges: Survey fatigue from other DART surveys (DART Fare Study, NCTCOG, DART Modernization Survey)

Confusion due to survey collaterals given away by Fare enforcer officers (for a different survey).

Fewer riders due to heat and new bus network

People expect immediate gratification, otherwise not taking the surveys.

Quality checks and Data Entry

- Two daily shifts (morning and afternoon) for onboard collection, under the guidance of separate supervisors.

- For every paper survey collected, the data collectors initial their surveys, and their supervisors initial the surveys.

- Paper surveys sent to Quality Control team by the end of the day for a high-level overview & checking if both pages, the majority of questions have been completed.

- Paper surveys then scanned and sent to Data Entry Team who performs additional quality checks to look for duplicates or irregular patterns.

- The Data Entry Team manually inputs all scanned surveys into the system by filling out the Online Survey that was specifically designed for the Paper Surveys.

- Final step: technical team qualified response based on preset guidelines:

  - 7 specified questions must have beeen answered

  - 70% Rule: 44 of 63 specified, evaluated responses completed

Spanish Speaking Emphasis Test

Objectives:

Test a Spanish-speaking first approach to gain higher participation of the Hispanic community

Process:

Identify a high Hispanic index survey location and approach everyone in Spanish language first, then defer to English

Focused on the *Downtown Irving/Heritage Crossing Station* on two morning and afternoon shifts.

Data collectors walked up to every rider and asked if they would like to take the survey in Spanish. If the person did not understand Spanish, the data collector asked the same question in English.

Summary:

- Most Spanish-speaking riders preferred to take the survey in English.

- Several older Hispanic/Latino riders said they could not read

- Younger Hispanic/Latino riders were more willing to complete the survey and preferred to complete the survey in English.

- The approach and style of interaction with Spanish-speaking riders, especially the older population, may have played a factor in their decision to complete the survey.

- Less than a third of riders approached were willing to complete the survey. It is worth considering benchmarking against other station locations in the future.

Spanish Speaking Emphasis Test

Of those respondents who took a survey, we received a higher percentage taking it in Spanish

Data Collector 1:	Data Collector 2:
• People Reached: 70	• People Reached: 45
• Total Surveys completed: 20	• Total Surveys completed: 20
○ **Surveys completed in Spanish: 6 (30%)**	○ **Surveys completed in Spanish: 8 (40%)**
○ Surveys completed in English: 14 (70%)	○ Surveys completed in English: 12 (60%)

Weighted - Sample Demographics

Gender	2012	2014	2015	2016	2017	2018	2019	2021	2022	2023
	%	%	%	%	%	%	%	%	%	%
Male	53	53	53	53	53	55	52	62	60	58
Female	47	47	47	47	47	45	48	38	39	39
Self-describe									1	1
Age										
18 to 24	28	28	28	28	28	28	28	25	17	17
25 to 34	33	33	33	33	33	33	33	34	20	19
35 to 44	20	20	20	20	20	20	20	16	24	24
45 to 54	12	12	12	12	12	12	12	13	16	16
55 to 64	6	6	6	6	6	6	6	8	17	17
65 or older	2	2	2	2	2	2	2	4	7	6
Ethnicity										
African Am	60	57	60	57	56	53	48	65	53	65
Caucasian	23	23	26	26	25	23	27	23	24	25
Asian	3	3	3	4	5	5	8	5	7	7
Other	18	19	15	15	17	21	20	8	18	4
Hispanic										
Yes	19	21	22	20	20	23	24	18	22	24
No	81	79	78	80	80	77	76	82	78	76
Employment Status										
Employed	69	67	68	na	78	na	77	68	81	66
Not employed	31	33	32	na	22	na	23	32	19	34

Household Size	2012	2014	2015	2016	2017	2018	2019	2021	2022	2023
	%	%	%	%	%	%	%	%	%	%
1	19	18	16	n/a	21	n/a	21	23	25	25
2	25	25	30	n/a	27	n/a	28	29	29	28
3	22	24	28	n/a	22	n/a	21	25	23	25
4 or more	34	33	25	n/a	31	n/a	30	23	22	22
Average #	*2.7*	*2.7*	*2.6*	*n/a*	*2.6*	*n/a*	*2.6*			
Language of Survey										
English	97	97	99	96	98	94	95			[ ]
Spanish	4	3	1	4	2	6	5			
Segments										
Reliant Comm								23	43	27
Corporate Comm								7	21	7
Task Rider								16	28	21
Event Rider								4	6	4
Not determinable								50	2	40
Household Income										
Under $15,000	47	46	43	46	40	40	31	31	23	31
$15,000 - $24,999	23	25	26	24	22	24	21	20	24	22
$25,000 - $49,999	18	16	20	18	22	19	23	22	28	32
$50,000 - $74,999	7	7	6	7	9	8	13	13	15	8
$75,000 and over	6	6	5	6	9	8	12	6	10	7
Average income	*$27.8K*	*$27.6K*	*$27.4K*	*$28.1K*	*$31.8K*	*$30.8K*	*$37.8K*			

DART's multi-modal riders have higher satisfaction metrics

Satisfaction metrics by Bus vs. Rail riders

Satisfaction With DART : % Very/Somewhat Satisfied

- Bus only
- Rail only
- Both (Bus and rail)

70%
69%
60%
65%
55%
58%
66%
64%
55%

2021   2022   2023
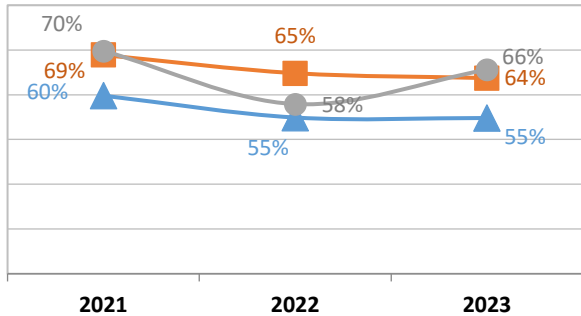
Likelihood to Continue Using DART : % Very/Somewhat Likely

- Bus only
- Rail only
- Both (Bus and rail)

81%
77%
63%
75%
69%
66%
84%
79%
69%

2021   2022   2023
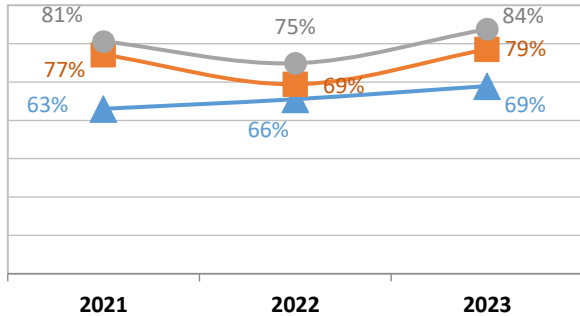
Likelihood To Recommend : NPS

- Bus only
- Rail only
- Both (Bus and rail)

10.3
12.4
(2.1)
(12.6)
(13.7)
(22.8)
5.6
1.0
(2.5)

2021   2022   2023
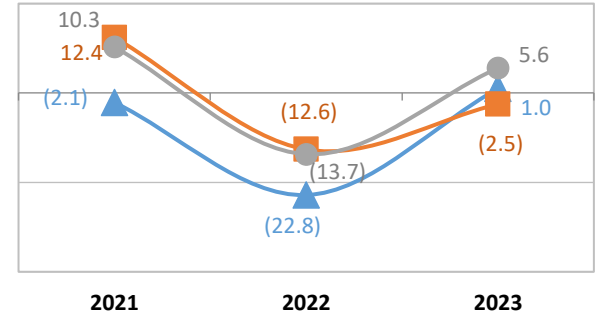
Bus-only and rail-only riders did not show any improvement in satisfaction

Rider proportions (based on 2023 survey respondents) →

Other 3%
Bus only 19%
Rail only 21%
Bus and Rail 57%
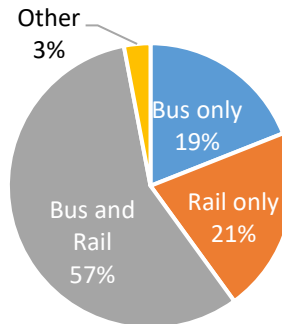
DART does well with longer tenured riders; there is room for improvement in the onboarding experience of new riders

Satisfaction metrics by tenure with DART

Satisfaction With DART : % Very/Somewhat Satisfied

Legend: 1st time, 0-12 months, >1 year

- 71% (2021, >1 year)
- 58% (2021, 0-12 months)
- 49% (2021, 1st time)
- 61% (2022, 0-12 months)
- 57% (2022, >1 year)
- 53% (2022, 1st time)
- 65% (2023, >1 year)
- 59% (2023, 0-12 months)
- 40% (2023, 1st time)

Years: 2021, 2022, 2023

Likelihood to Continue Using DART : % Very/Somewhat Likely

Legend: 1st time, 0-12 months, >1 year

- 81% (2021, >1 year)
- 65% (2021, 0-12 months)
- 50% (2021, 1st time)
- 73% (2022, >1 year)
- 69% (2022, 0-12 months)
- 51% (2022, 1st time)
- 83% (2023, >1 year)
- 72% (2023, 0-12 months)
- 47% (2023, 1st time)

Years: 2021, 2022, 2023

Likelihood To Recommend : NPS

Legend: 1st time, 0-12 months, >1 year

- 12.7 (2021, >1 year)
- (1.7) (2021, 0-12 months)
- (9.2) (2021, 1st time)
- (13.2) (2022, 0-12 months)
- (17.1) (2022, >1 year)
- (19.0) (2022, 1st time)
- 5.00 (2023, >1 year)
- (1.50) (2023, 0-12 months)
- (15.50) (2023, 1st time)

Years: 2021, 2022, 2023

Rider proportions (based on 2023 survey respondents)

Pie chart:
- 1st time 5%
- 0-12 months 25%
- >1 year 70%

DART improved its performance on buses not showing up or not stopping to pickup

Problems With Bus Not Showing Up At All – Very Often/Often/Sometimes (Net)

Legend:
- Dependent rider / Choice rider
- Men / Women
- Age 18-24 / Age 25-34 / Age 35+
- Caucasian / African American
- Hispanic / Not Hispanic

Dependent rider / Choice rider

	2015	2017	2019	2021	2022	2023
Dependent rider	52%	53%	54%	53%	69%	51%
Choice rider	46%	41%	40%	49%	59%	44%

Men / Women

	2015	2017	2019	2021	2022	2023
Women	51%	49%	47%	52%	67%	50%
Men	50%	48%	46%	51%	63%	46%

Age

	2015	2017	2019	2021	2022	2023
Age 35+	52%					49%
Age 18-24	51%				46%	44%

Caucasian / African American

	2015	2017	2019	2021	2022	2023
African American	53%	51%	54%	54%	70%	51%
Caucasian	49%	42%	38%	43%	57%	43%

Hispanic / Not Hispanic

	2015	2017	2019	2021	2022	2023
Not Hispanic	50%	48%	48%	52%	66%	49%
Hispanic	50%	47%	42%	50%	60%	46%

Problems With Bus Not Stopping to Pickup– Very Often/Often/Sometimes (Net)

Dependent rider / Choice rider

	2015	2017	2019	2021	2022	2023
Dependent rider	52%	53%	54%	47%	54%	47%
Choice rider	46%	41%	40%	42%	47%	38%

Men / Women

	2015	2017	2019	2021	2022	2023
Women	51%	49%	47%	46%	53%	44%
Men	50%	48%	46%	45%	47%	42%

Age

	2015	2017	2019	2021	2022	2023
Age 35+	52%					45%
Age 18-24	49%				41%	40%

Caucasian / African American

	2015	2017	2019	2021	2022	2023
African American	53%	51%	54%	47%	56%	46%
Caucasian	49%	42%	38%	37%	43%	38%

Hispanic / Not Hispanic

	2015	2017	2019	2021	2022	2023
Not Hispanic	50%	48%	48%	46%	52%	44%
Hispanic	50%	47%	42%	44%	46%	39%

GoPass app usage increased across the board, has highest usage among Rail riders

How passes paid for, by Bus vs. Rail riders

Bus only

Category	2021	2022	2023
Other	1%	3%	4%
Corporate Pass	2%	4%	4%
GoPass Tap Card	6%	5%	4%
GoPass App	12%	25%	34%
Contactless payment at the card reader *	15%	8%	7%
Cash	65%	55%	47%

Rail only

Category	2021	2022	2023
Other	2%	3%	3%
Corporate Pass	5%	8%	5%
GoPass Tap Card	8%	7%	4%
GoPass App	22%	31%	49%
Contactless payment at the card reader *	28%	17%	11%
Cash	36%	34%	29%

Both (Bus and rail)

Category	2021	2022	2023
Other	2%	3%	3%
Corporate Pass	2%	3%	2%
GoPass Tap Card	6%	7%	5%
GoPass App	20%	27%	38%
Contactless payment at the card reader *	19%	12%	5%
Cash	50%	47%	48%

Legend: Other, Corporate Pass, GoPass Tap Card, GoPass App, Contactless payment at the card reader *, Cash

Q5. How do you typically pay for the DART passes you use?
* Reworded in 2023

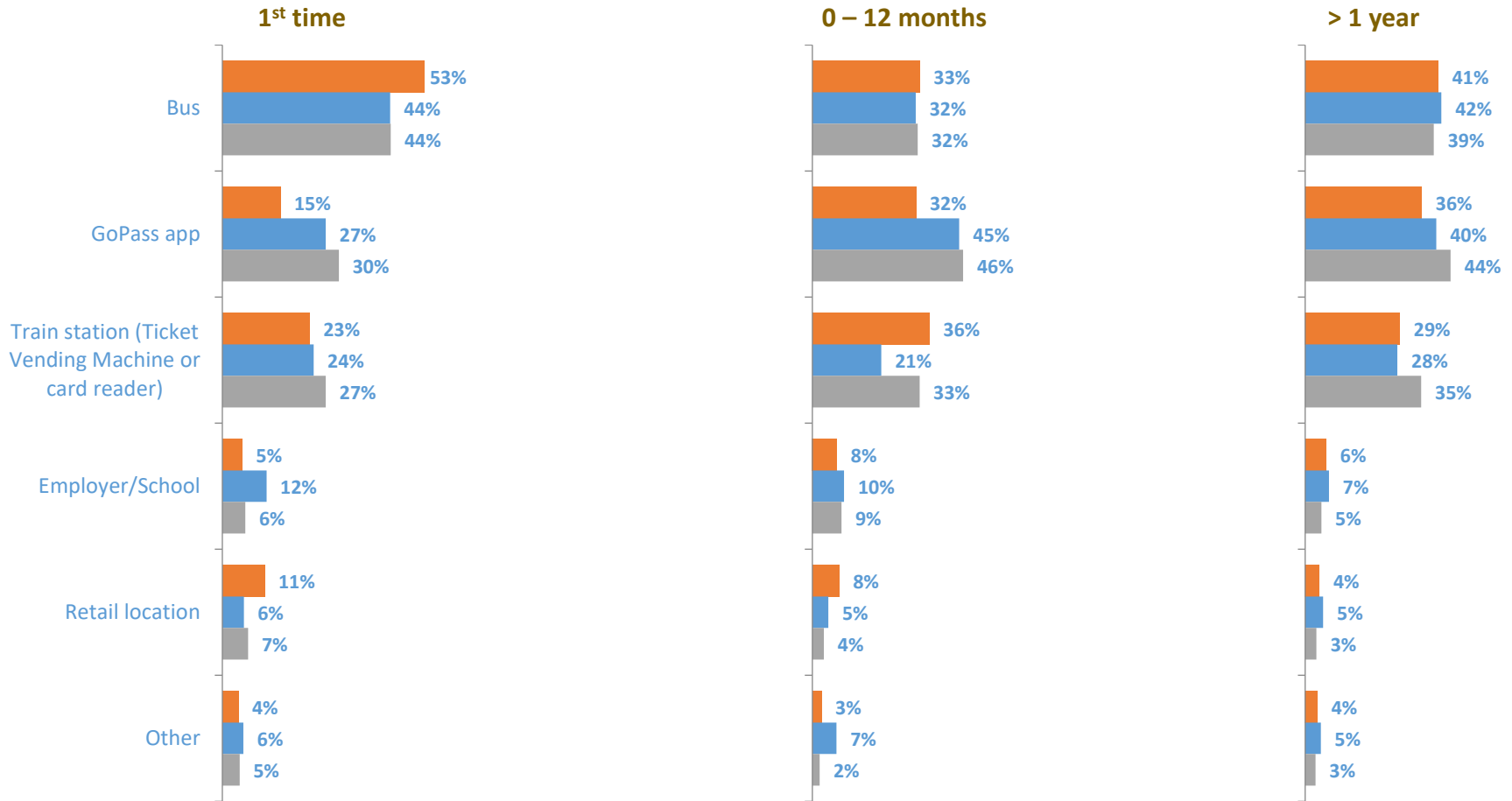# GoPass is now the second most popular way to pay for passes

- **This question was reworded in 2023: from "where passes are purchased" to "where do you pay**

	1st time	0 – 12 months	> 1 year

Bus
- 1st time: 53%, 44%, 44%
- 0 – 12 months: 33%, 32%, 32%
- > 1 year: 41%, 42%, 39%

GoPass app
- 1st time: 15%, 27%, 30%
- 0 – 12 months: 32%, 45%, 46%
- > 1 year: 36%, 40%, 44%

Train station (Ticket Vending Machine or card reader)
- 1st time: 23%, 24%, 27%
- 0 – 12 months: 36%, 21%, 33%
- > 1 year: 29%, 28%, 35%

Employer/School
- 1st time: 5%, 12%, 6%
- 0 – 12 months: 8%, 10%, 9%
- > 1 year: 6%, 7%, 5%

Retail location
- 1st time: 11%, 6%, 7%
- 0 – 12 months: 8%, 5%, 4%
- > 1 year: 4%, 5%, 3%

Other
- 1st time: 4%, 6%, 5%
- 0 – 12 months: 3%, 7%, 2%
- > 1 year: 4%, 5%, 3%

■ 2021 ■ 2022 ■ 2023

Q4. Where do you typically pay for your DART ride?

20% of respondents use GoLink; bus-only has remained flat at 19%

Services Typically Used (% of all respondents)

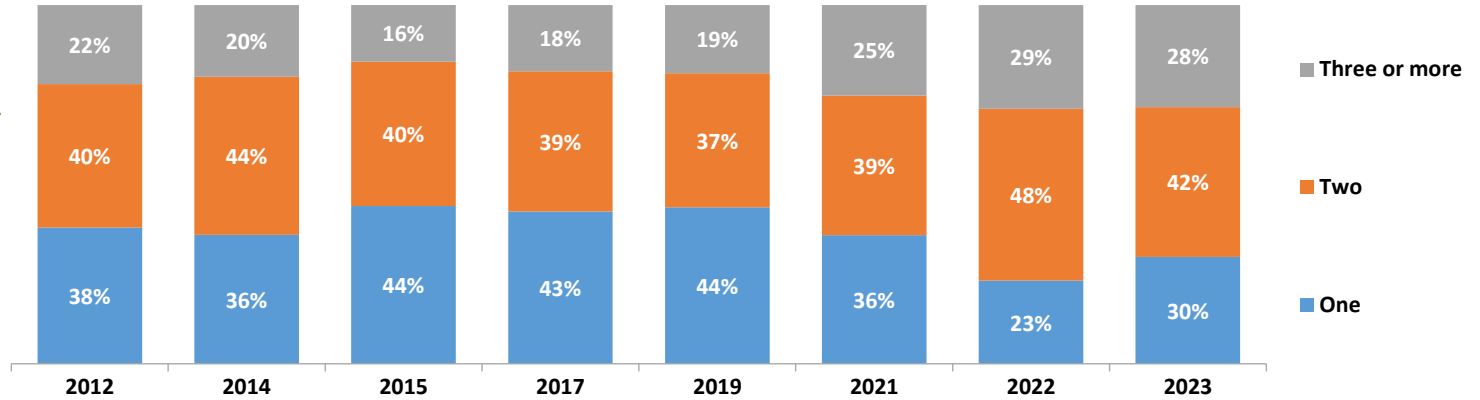|	'12	'14	'15	'16	'17	'18	'19	'21	'22	'23
Base: n=	5207	5433	5421	2837	5853	3596	6585	6542	6185	6493
Bus	71	71	71	71	71	71	71	68	82	70
DART Rail (Net)	60	59	56	58	58	59	59	76	79	77
GoLink										20
Trinity Railway Express	6	8	10	8	9	6	8	12	17	16
Dallas Streetcar										6
Trinity Metro										6
Paratransit services										5
DCTA	2	2	3	2	3	2	3	6	2	4
McKinney Avenue Trolley										4
Bus Only	39	39	39	39	39	39	39	19	19	19
Trains/Rail Only	29	29	29	29	29	29	29	26	16	21
Both	32	32	32	32	32	32	32	49	63	57

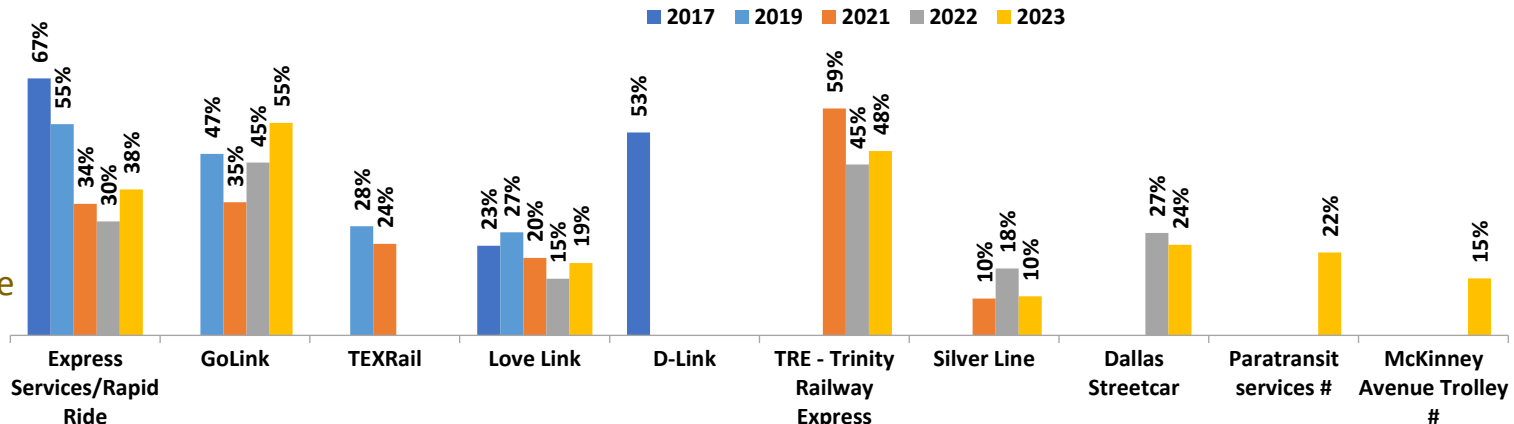Q7. Which of the following do you usually ride?

More riders are taking trips without connections

DART Trip Today

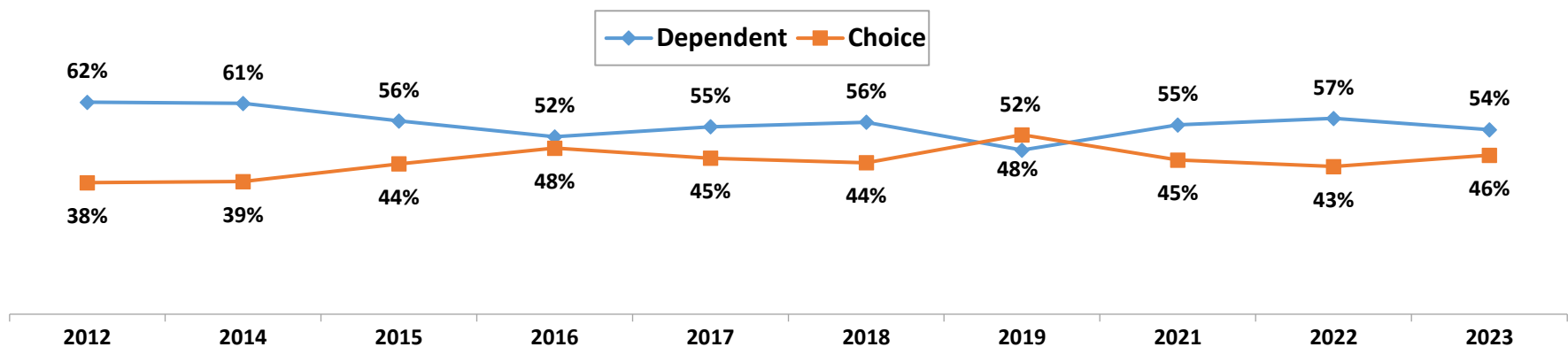**2) Counting this DART trip, how many connections will you make (one way, including GoLink)?**

Year	One	Two	Three or more
2012	38%	40%	22%
2014	36%	44%	20%
2015	44%	40%	16%
2017	43%	39%	18%
2019	44%	37%	19%
2021	36%	39%	25%
2022	23%	48%	29%
2023	30%	42%	28%

3) Which of the following additional services are you aware of?

Legend: 2017, 2019, 2021, 2022, 2023

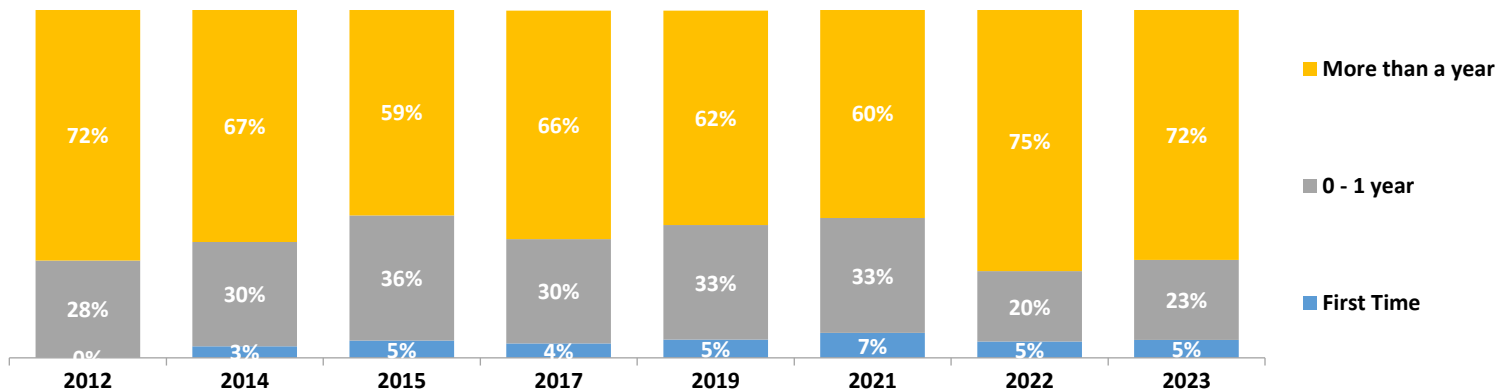| Service	2017	2019	2021	2022	2023
Express Services/Rapid Ride	67%	55%	34%	30%	38%
GoLink		47%	35%	45%	55%
TEXRail		28%	24%		
Love Link	23%	27%	20%	15%	19%
D-Link	53%				
TRE - Trinity Railway Express			59%	45%	48%
Silver Line			10%	18%	10%
Dallas Streetcar				27%	24%
Paratransit services #					22%
McKinney Avenue Trolley #					15%

Note # : Added in 2023

Dependent riders continue to outnumber choice riders but the gap narrowed slightly in 2023

Legend: Dependent, Choice

	2012	2014	2015	2016	2017	2018	2019	2021	2022	2023
Dependent	62%	61%	56%	52%	55%	56%	48%	55%	57%	54%
Choice	38%	39%	44%	48%	45%	44%	52%	45%	43%	46%

New: Which of the following describes you best?

72% of respondents have been riding for less than a year

Stacked bar chart legend: More than a year, 0 - 1 year, First Time

	2012	2014	2015	2017	2019	2021	2022	2023
More than a year	72%	67%	59%	66%	62%	60%	75%	72%
0 - 1 year	28%	30%	36%	30%	33%	33%	20%	23%
First Time	0%	3%	5%	4%	5%	7%	5%	5%

6) How long have you been riding DART?
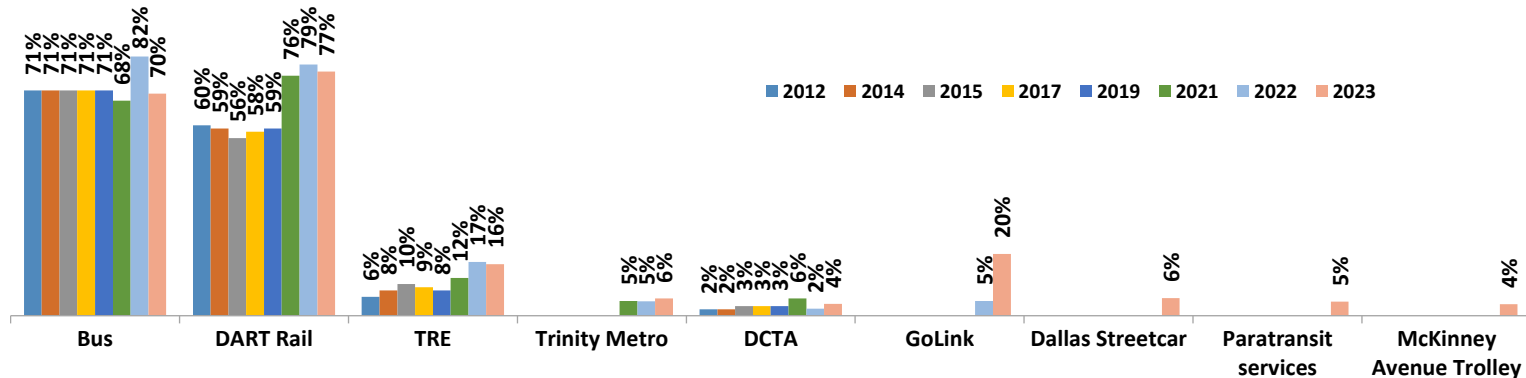
7) Which of the following do you usually ride?

Bar chart legend: 2012, 2014, 2015, 2017, 2019, 2021, 2022, 2023

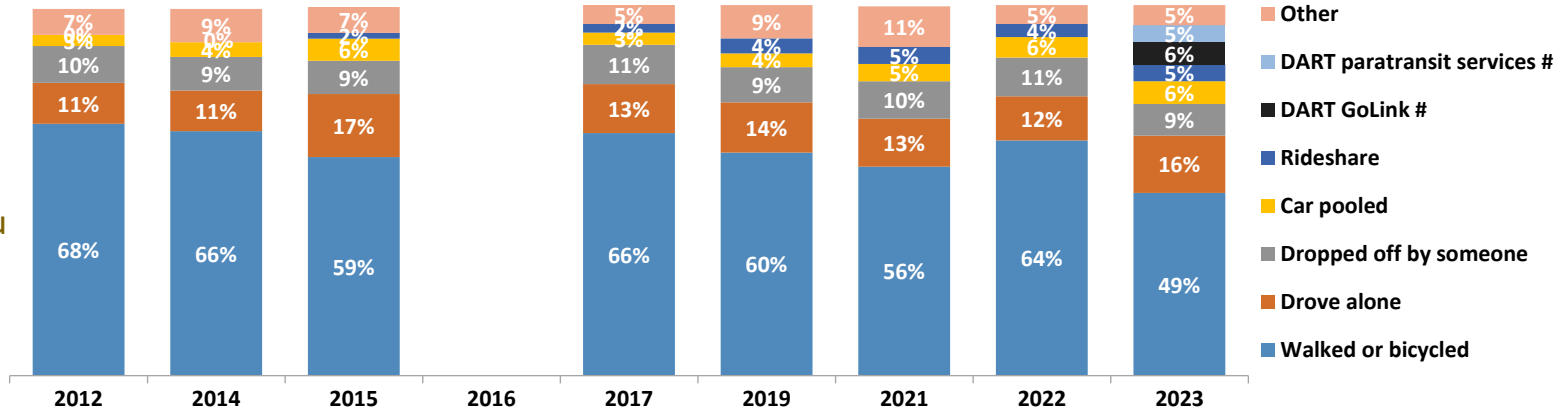|	Bus	DART Rail	TRE	Trinity Metro	DCTA	GoLink	Dallas Streetcar	Paratransit services	McKinney Avenue Trolley
2012	71%	60%	6%		2%				
2014	71%	59%	8%		2%				
2015	71%	56%	10%		3%				
2017	71%	58%	9%		3%				
2019	68%	59%	8%		3%				
2021	82%	76%	12%	5%	6%	5%			
2022	70%	79%	17%	5%	2%			5%	
2023		77%	16%	6%	4%	20%	6%		4%

DART let's go.

39

The proportion of riders who walk/bike to DART has reduced with GoLink and paratransit services

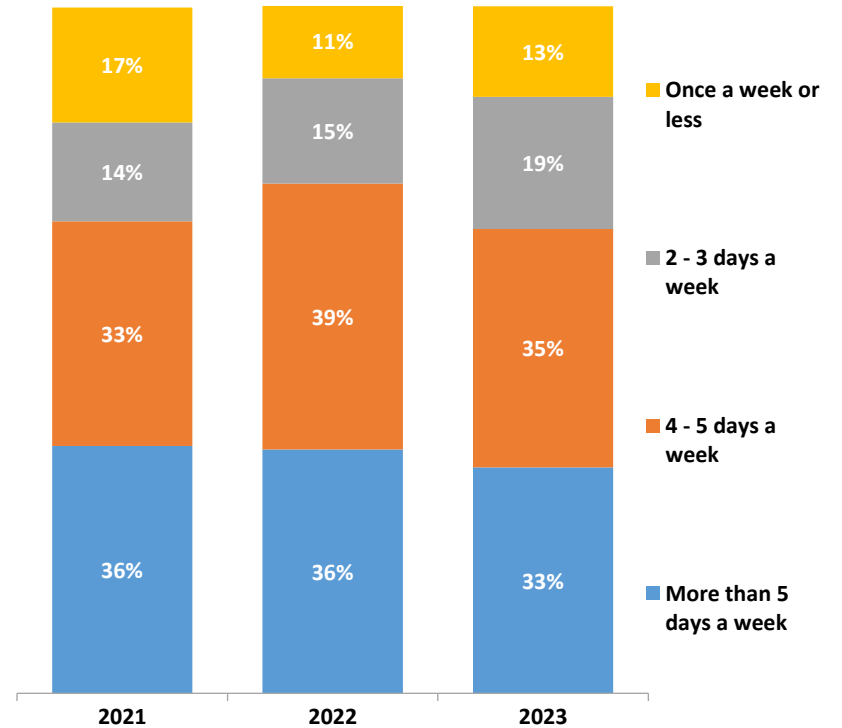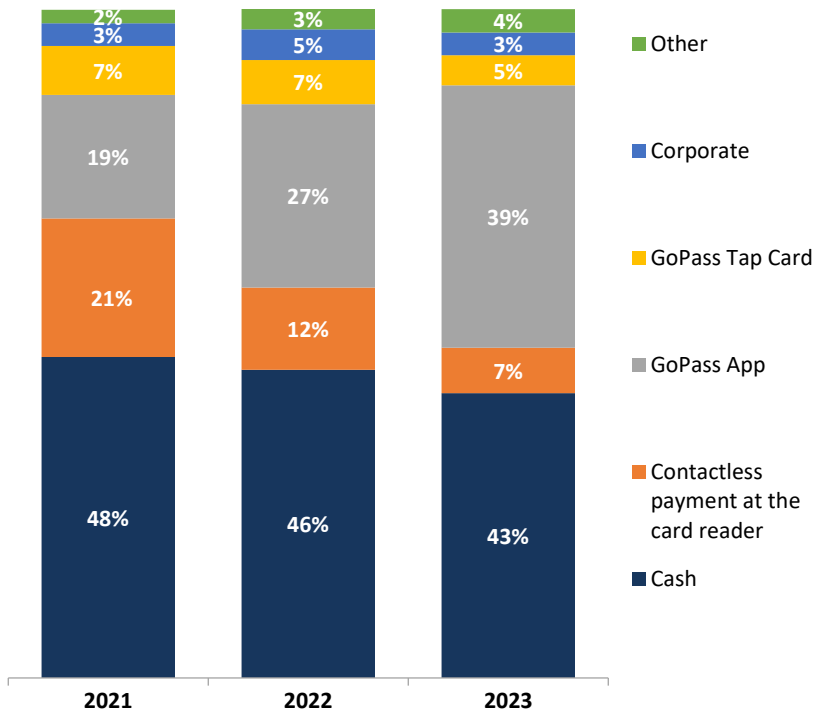1) How did you travel to the location where you began your first DART trip today?

Legend:
- Other
- DART paratransit services #
- DART GoLink #
- Rideshare
- Car pooled
- Dropped off by someone
- Drove alone
- Walked or bicycled

Category	2012	2014	2015	2016	2017	2019	2021	2022	2023
Other	7%	9%	7%		5%	9%	11%	5%	5%
DART paratransit services #									5%
DART GoLink #									6%
Rideshare	3%	1%	2%		2%	4%	5%	4%	5%
Car pooled	1%	4%	6%		3%	4%	5%	6%	6%
Dropped off by someone	10%	9%	9%		11%	9%	10%	11%	9%
Drove alone	11%	11%	17%		13%	14%	13%	12%	16%
Walked or bicycled	68%	66%	59%		66%	60%	56%	64%	49%

Note # : Added in 2023

GoPass App usage continues to grow – nearly 40%; Frequency of usage declined slightly

Usage Of DART Passes

5) How do you typically pay for your DART ride?

|	2021	2022	2023
Other	2%	3%	4%
Corporate	3%	5%	3%
GoPass Tap Card	7%	7%	5%
GoPass App	19%	27%	39%
Contactless payment at the card reader	21%	12%	7%
Cash	48%	46%	43%

8) How often do you use DART?

	2021	2022	2023
Once a week or less	17%	11%	13%
2 - 3 days a week	14%	15%	19%
4 - 5 days a week	33%	39%	35%
More than 5 days a week	36%	36%	33%

Nearly 2/3ʳᵈ of customers use DART for commute to work

10) What is the primary purpose for which you use DART?

Legend: 2012, 2014, 2015, 2016, 2017, 2018, 2019, 2021, 2022, 2023
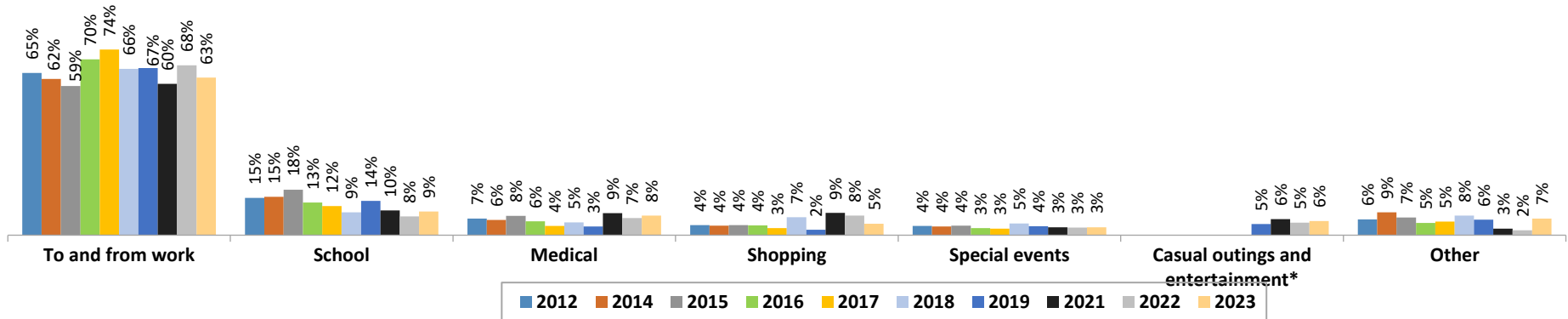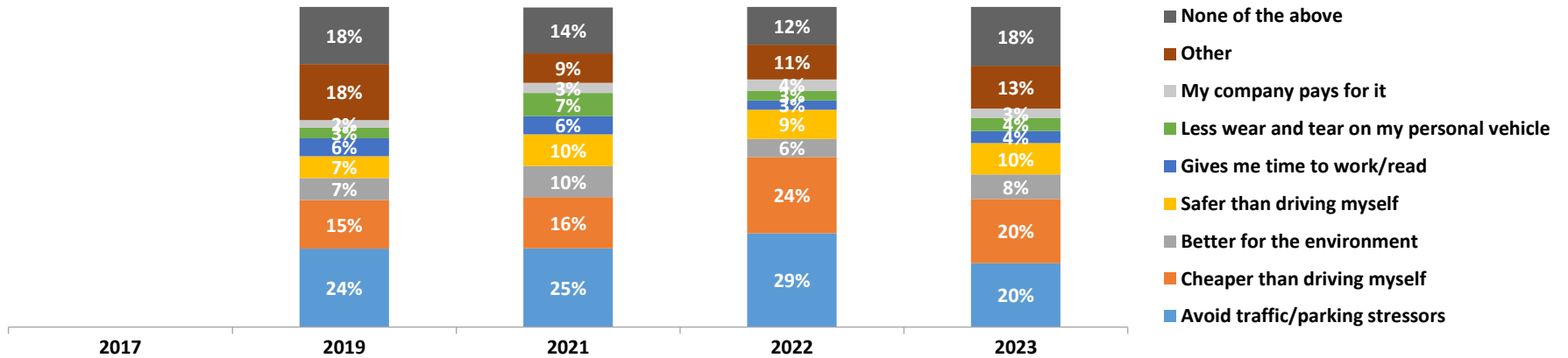
9) For what purposes have you used DART in the past 6 months?
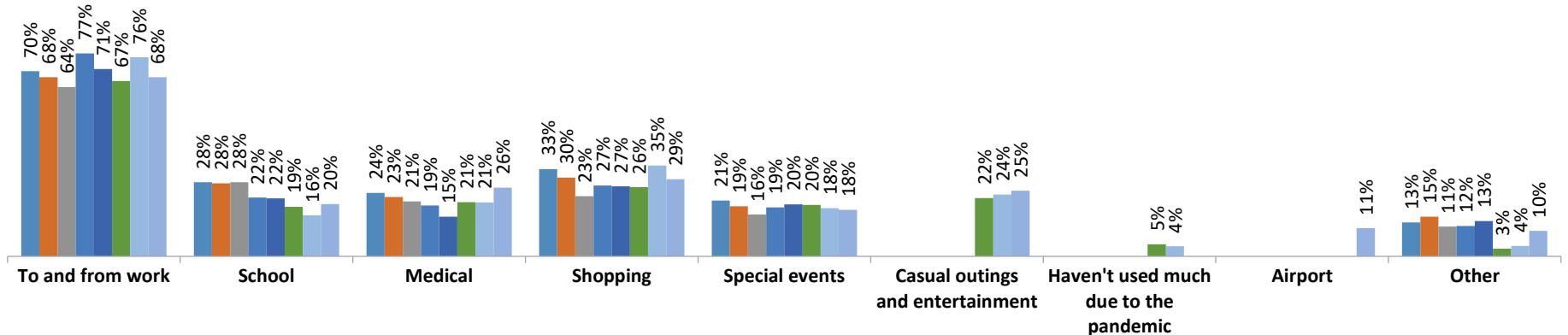
Riders most often use DART to avoid traffic/parking stressors or to save money

11) What is the primary reason you use DART for your transportation needs?

Legend:
- None of the above
- Other
- My company pays for it
- Less wear and tear on my personal vehicle
- Gives me time to work/read
- Safer than driving myself
- Better for the environment
- Cheaper than driving myself
- Avoid traffic/parking stressors

	2017	2019	2021	2022	2023
None of the above		18%	14%	12%	18%
Other		18%	9%	11%	13%
My company pays for it		2%	3%	4%	3%
Less wear and tear on my personal vehicle		3%	7%	3%	2%
Gives me time to work/read		6%	6%	3%	4%
Safer than driving myself		7%	10%	9%	10%
Better for the environment		7%	10%	6%	8%
Cheaper than driving myself		15%	16%	24%	20%
Avoid traffic/parking stressors		24%	25%	29%	20%

Note: Asked first in 2019.

Key Driver Analysis
Drivers of DART Satisfaction

On-time buses, convenient location of stops and courteous DART police are the <u>most important</u> drivers of overall satisfaction with DART.

Legend:
- Timeliness (orange)
- Cleanliness (magenta)
- Communication (blue)
- Safety/Security (yellow/gold)
- Customer Service (green)
- Convenience (red)

Attribute	Score
GoLink vehicles safety	0.177
On-time buses	0.146
Train safety	0.139
Courteous Transit Center employees	0.128
Clean buses	0.128
Courteous bus operator	0.122
Connection waiting time	0.122
Clean facilities	0.121
On-time trains	0.118
Clear bus and train destination signage	0.117
Easy ticket purchasing	0.116
Real-time schedule / info on disruptions	0.114
Readily available maps and schedules	0.113
Courteous DART police	0.110
Condition and accessibility of locations	0.107
Easy to navigate web site	0.105

Attribute	Score
Easy to use maps and schedules	0.103
Bus stop safety	0.100
Connection coordination	0.100
Courteous GoLink operators	0.097
Courteous train operator	0.094
Service frequency	0.094
Platform/Station safety	0.093
Parking lot safety	0.092
Courteous GoLink reservation agents	0.091
Convenient locations	0.084
Courteous telephone operators	0.081
Clean bus stops	0.076
Clean trains	0.073
Bus safety	0.066
Clean GoLink vehicles	0.042

Base: N=6493 (2023 Respondents)
Q13. Overall, how satisfied are you with the services provided by DART? (Check one)(5-point scale, *Very satisfied* to *Not at all satisfied*)
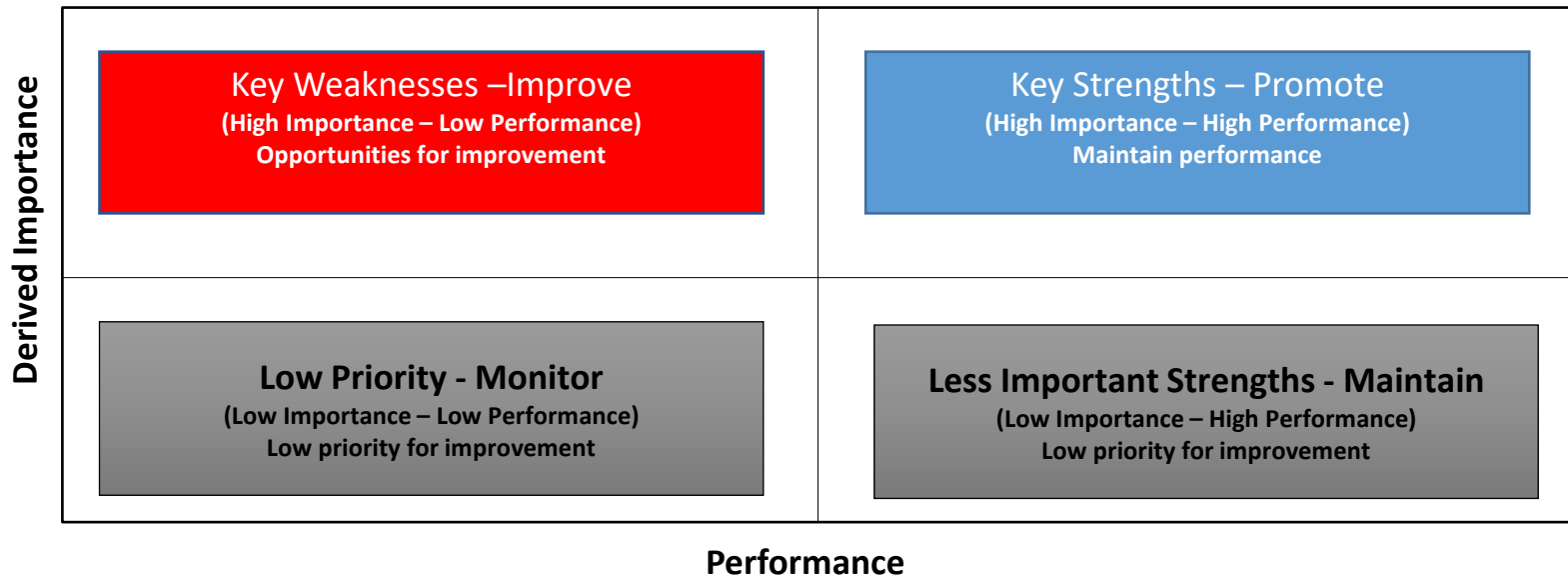Q27. How would you rate DART's performance on the following criteria? (5-point scale, *Excellent* to *Poor*)

Key Driver Maps

A quadrant map was created to show DART's performance against the key drivers of satisfaction

Derived importance (vertical axis) of each driver of satisfaction measures the degree of association between the predictor variables (Q27) and customer satisfaction (Q13). It is calculated using partial correlations, a robust method that controls for the inter-correlations between predictor variables, allowing for a clearer understanding of the relative impact of each one. (e.g., a predictor which explains twice the variance of another predictor can be viewed as being twice as important)

DART's **performance scores** (horizontal axis) are the top-two-box scores of the Q27 attributes.

Derived Importance (vertical axis label)

Key Weaknesses –Improve **(High Importance – Low Performance)** **Opportunities for improvement**	Key Strengths – Promote **(High Importance – High Performance)** **Maintain performance**
Low Priority - Monitor **(Low Importance – Low Performance)** **Low priority for improvement**	**Less Important Strengths - Maintain** **(Low Importance – High Performance)** **Low priority for improvement**

Performance

Net Promoter Score® (NPS)

Likelihood to recommend is a highly regarded question used across companies as a key indicator of performance.

Net Promoter System℠: Every company's customers can be divided into three categories. "Promoters" are loyal enthusiasts who keep buying from a company and urge their friends to do the same. "Passives" are satisfied, but unenthusiastic, customers who can be easily wooed by the competition. And "detractors" are unhappy customers trapped in a bad relationship.

How likely is it that you would recommend [company] to a friend or colleague?

10	9	8	7	6	5	4	3	2	1	0

Extremely likely (Promoters)

Not likely (Detractors)

Promoters ▬ (minus) **Detractors** ═ **NPS**

Appendix
Customer Datasets

Overall satisfaction improved in 2023, reversing a declining trend

Q13. Overall, how satisfied are you with the services provided by DART? (5-point scale, *Very satisfied* to *Not at all satisfied*)
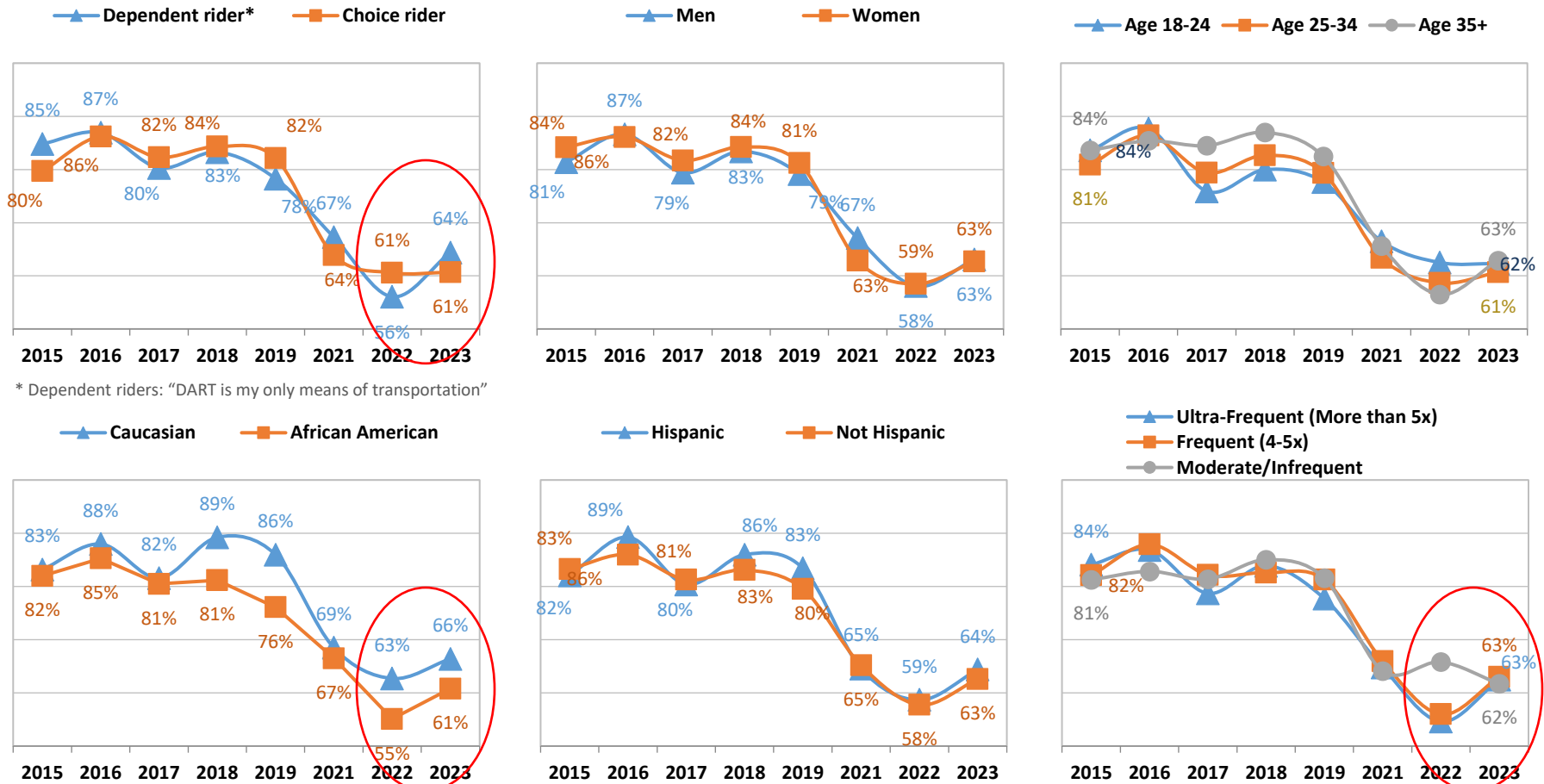
48
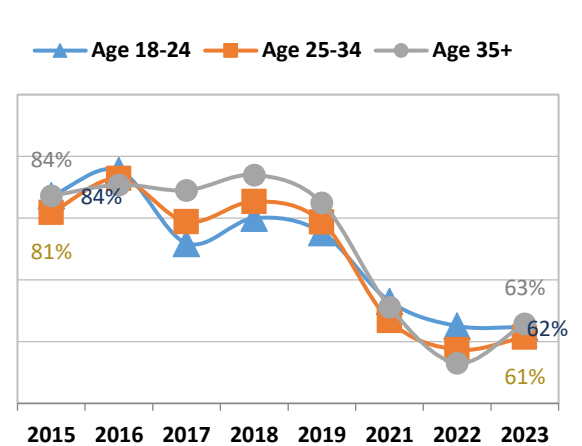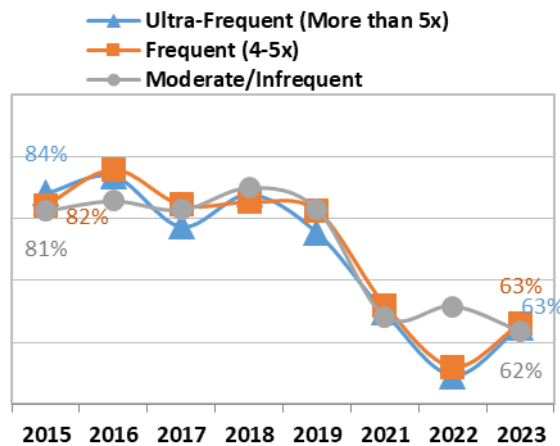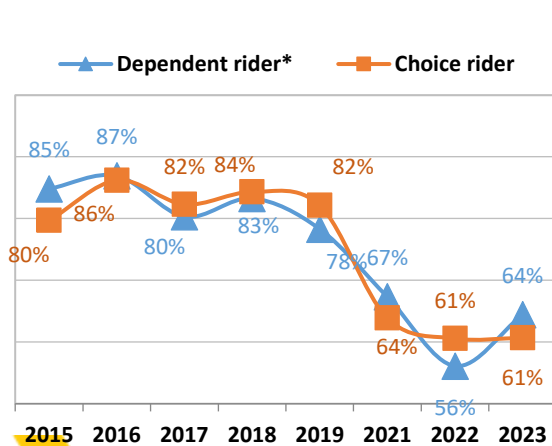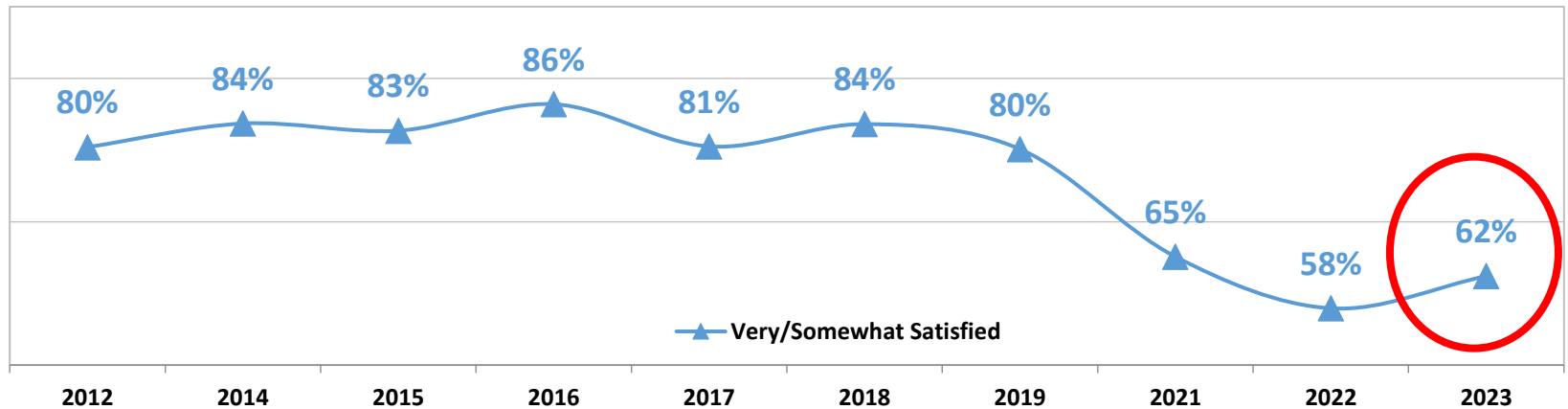
Satisfaction improved more among dependent riders, among African American and among frequent riders

Satisfaction With DART: Key Subgroups
% Very/Somewhat Satisfied

* Dependent riders: "DART is my only means of transportation"

Q13. Overall, how satisfied are you with the services provided by DART? (5-point scale, *Very satisfied* to *Not at all satisfied*)
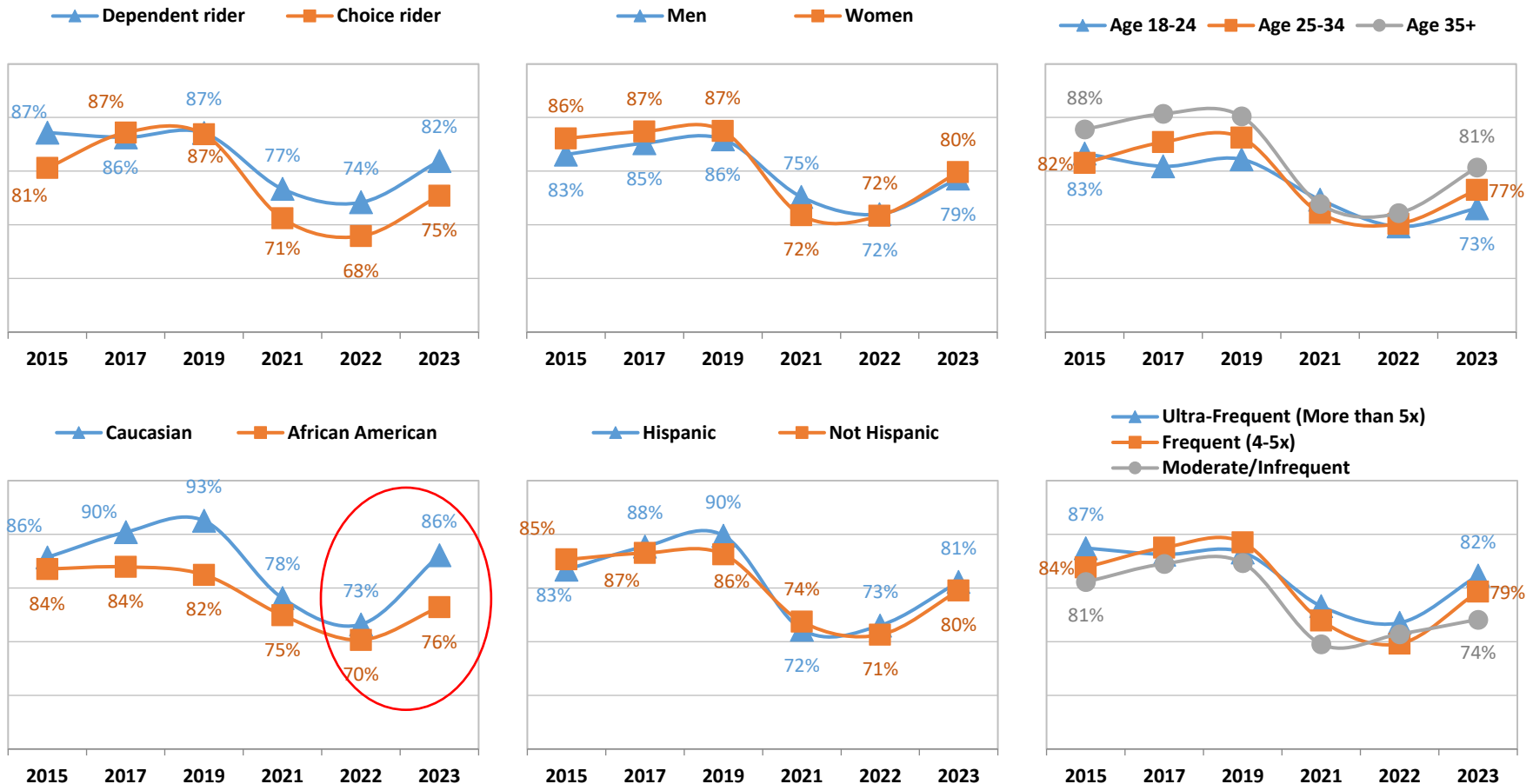
Likelihood to Continue Using DART rose in 2023

Total chart (Very/Somewhat likely):

Year	2012	2014	2015	2017	2019	2021	2022	2023
Very/Somewhat likely	86%	88%	85%	86%	87%	74%	71%	79%

Dependent rider / Choice rider:

Year	2015	2017	2019	2021	2022	2023
Dependent rider	87%	86%	87%	77%	74%	82%
Choice rider	81%	87%	87%	71%	68%	75%

Ultra-Frequent / Frequent / Moderate-Infrequent:

Year	2015	2017	2019	2021	2022	2023
Ultra-Frequent (More than 5x)	87%					82%
Frequent (4-5x)	84%					79%
Moderate/Infrequent	81%					74%

Age 18-24 / Age 25-34 / Age 35+:

Year	2015	2017	2019	2021	2022	2023
Age 18-24	82%					73%
Age 25-34	83%					77%
Age 35+	88%					81%

Q14. How likely are you to continue using DART in the future? (5-point scale, *Very likely* to *Not at all likely*)

Likelihood to continue using DART is higher among Caucasians and rose more for that segment
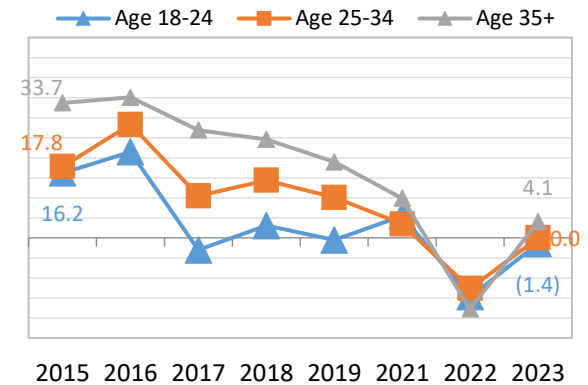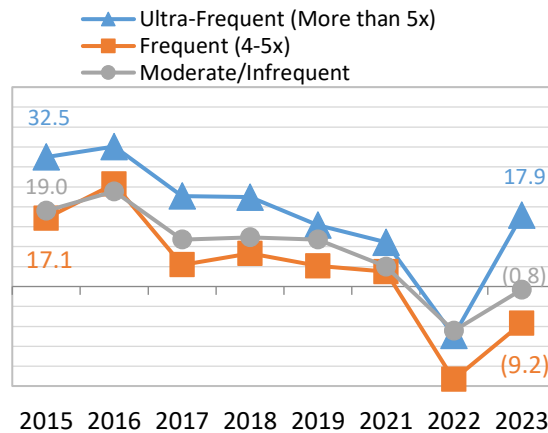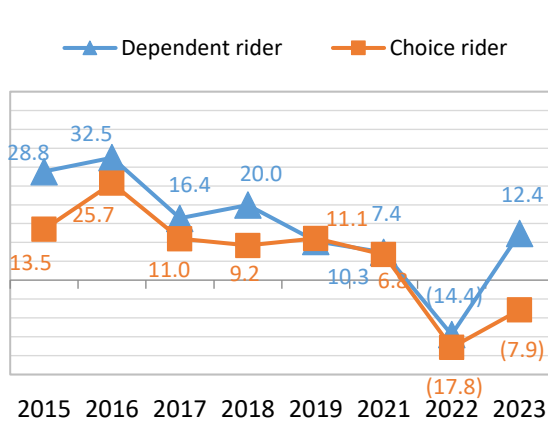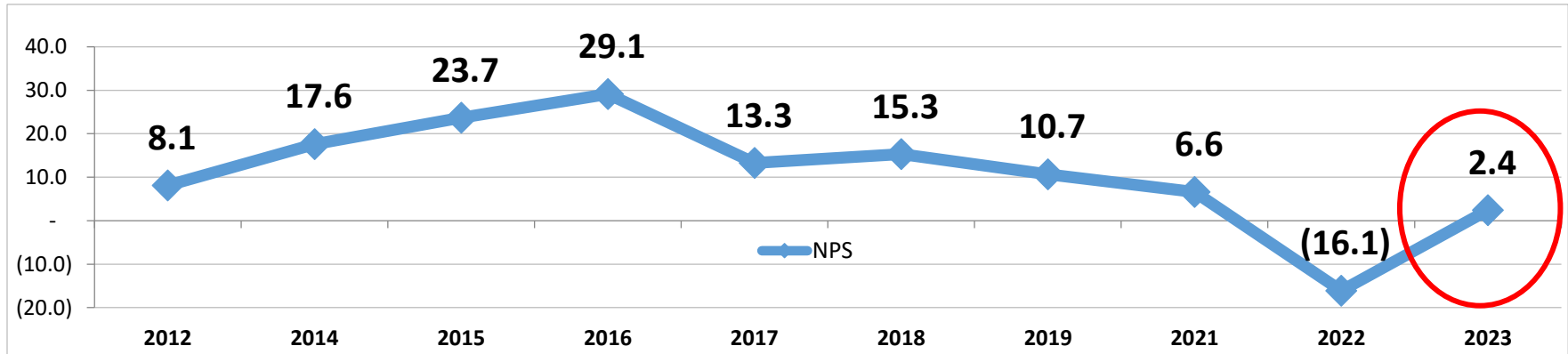
Likelihood to Continue Using DART: Key Subgroups
% Very/Somewhat Likely

Q14. How likely are you to continue using DART in the future? (5-point scale, *Very likely* to *Not at all likely*)

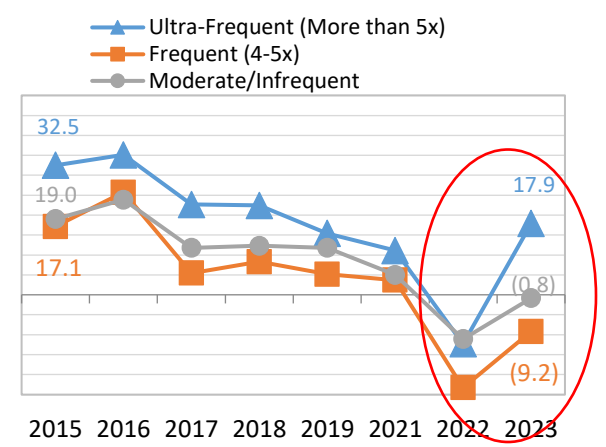# DART's NPS rebounded after a steep decline in 2022

Q15. On a scale of 0 to 10, how likely are you to recommend using DART to friends or family members? (11-point scale, 0 to 10, *Extremely Likely* to *Not At All Likely*)

DART's NPS increase was more among key customers – African Americans, dependent, and frequent riders

Likelihood To Recommend: Key Subgroups (Net Promoter Score)
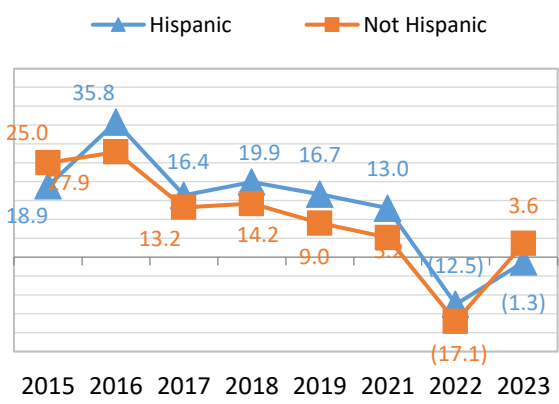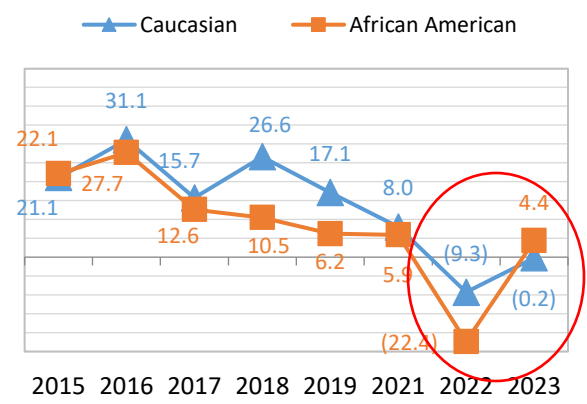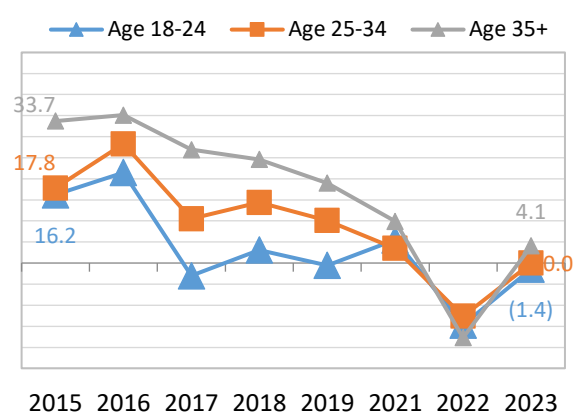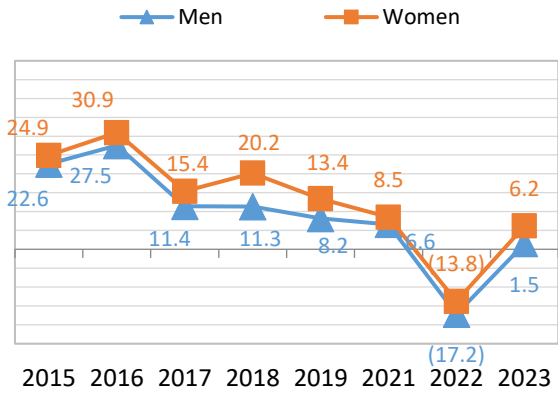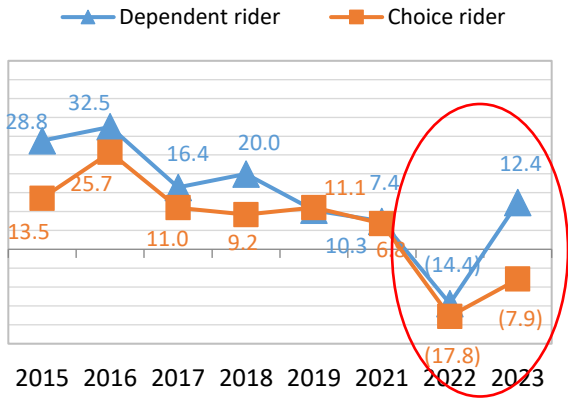
Q15. On a scale of 0 to 10, how likely are you to recommend using DART to friends or family members? (11-point scale, 0 to 10, *Extremely Likely* to *Not At All Likely*)

[Satisfaction excluding Dataset 3 – GoPass respondents]

Satisfaction With DART

(For comparison purposes only)
2023 data excludes respondents acquired through GoPass app

Very/Somewhat Satisfied: 80% (2012), 84% (2014), 83% (2015), 86% (2016), 81% (2017), 84% (2018), 80% (2019), 65% (2021), 58% (2022), 61% (2023)

Very Satisfied: 38% (2012), 47% (2014), 45% (2015), 47% (2016), 41% (2017), 45% (2018), 39% (2019), 30% (2021), 26% (2022), 30% (2023)

Legend: ▲ Very Satisfied   ■ Very/Somewhat Satisfied

Years: 2012, 2014, 2015, 2016, 2017, 2018, 2019, 2021, 2022, 2023

Q13. Overall, how satisfied are you with the services provided by DART? (5-point scale, *Very satisfied* to *Not at all satisfied*)

[Likelihood to ride excluding Dataset 3 – GoPass respondents]

Likelihood to Continue Using DART: Total
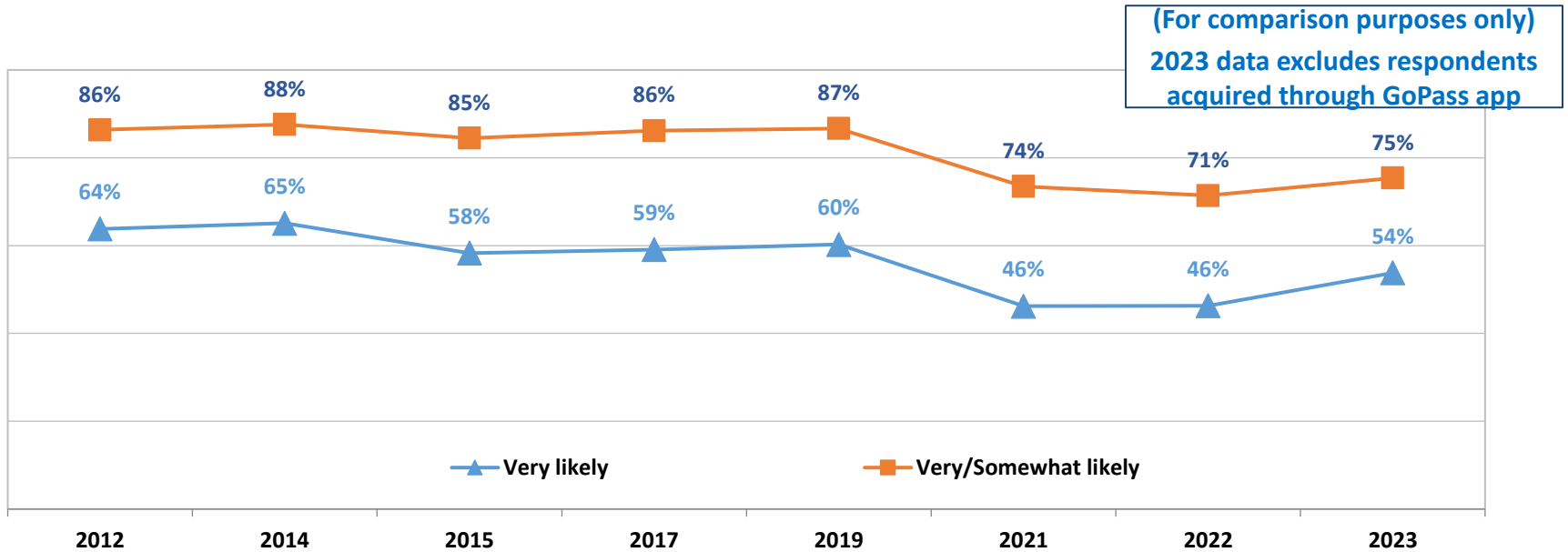
(For comparison purposes only)
2023 data excludes respondents acquired through GoPass app

	2012	2014	2015	2017	2019	2021	2022	2023
Very/Somewhat likely	86%	88%	85%	86%	87%	74%	71%	75%
Very likely	64%	65%	58%	59%	60%	46%	46%	54%

Q14. How likely are you to continue using DART in the future? (5-point scale, *Very likely* to *Not at all likely*)

[NPS excluding Dataset 3 – GoPass respondents]

Likelihood to Recommend (Net Promoter Score)
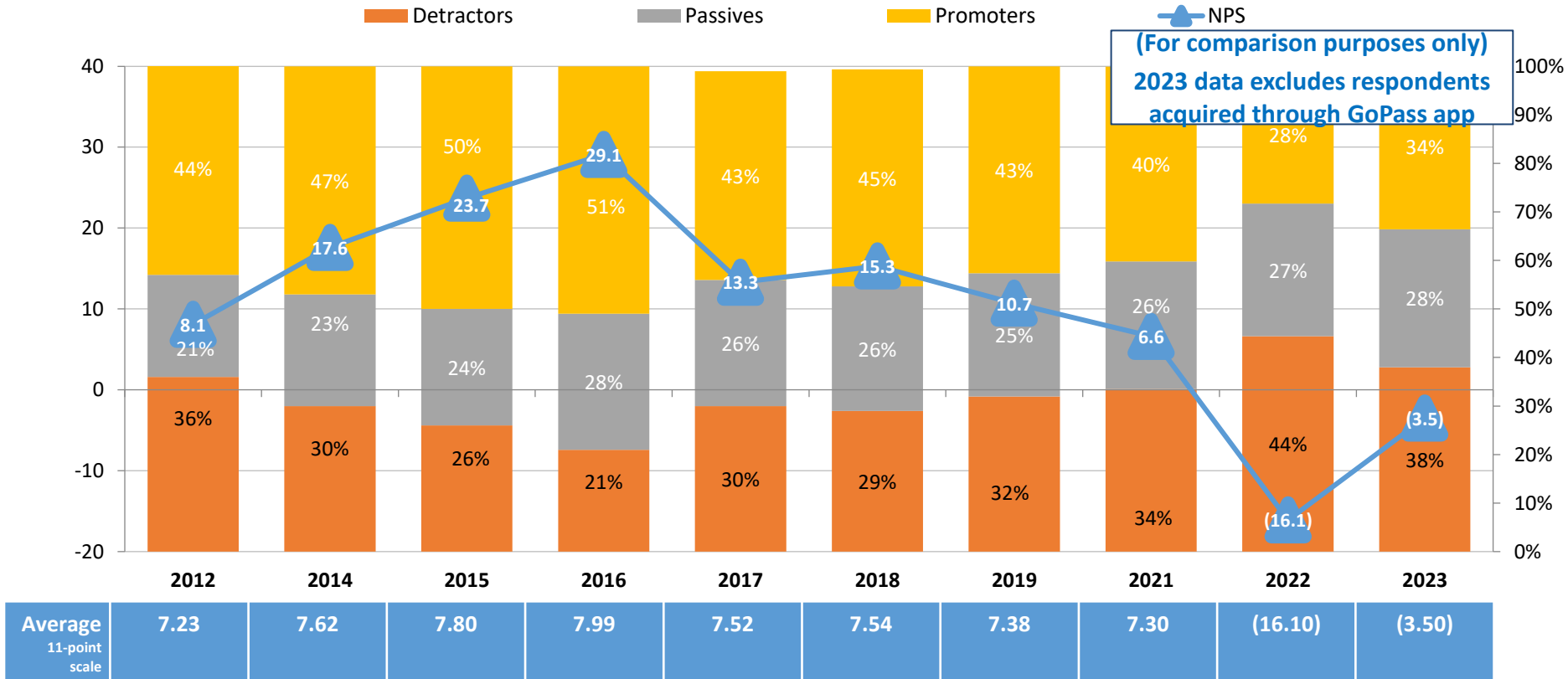
Legend: Detractors | Passives | Promoters | NPS

(For comparison purposes only)
2023 data excludes respondents acquired through GoPass app

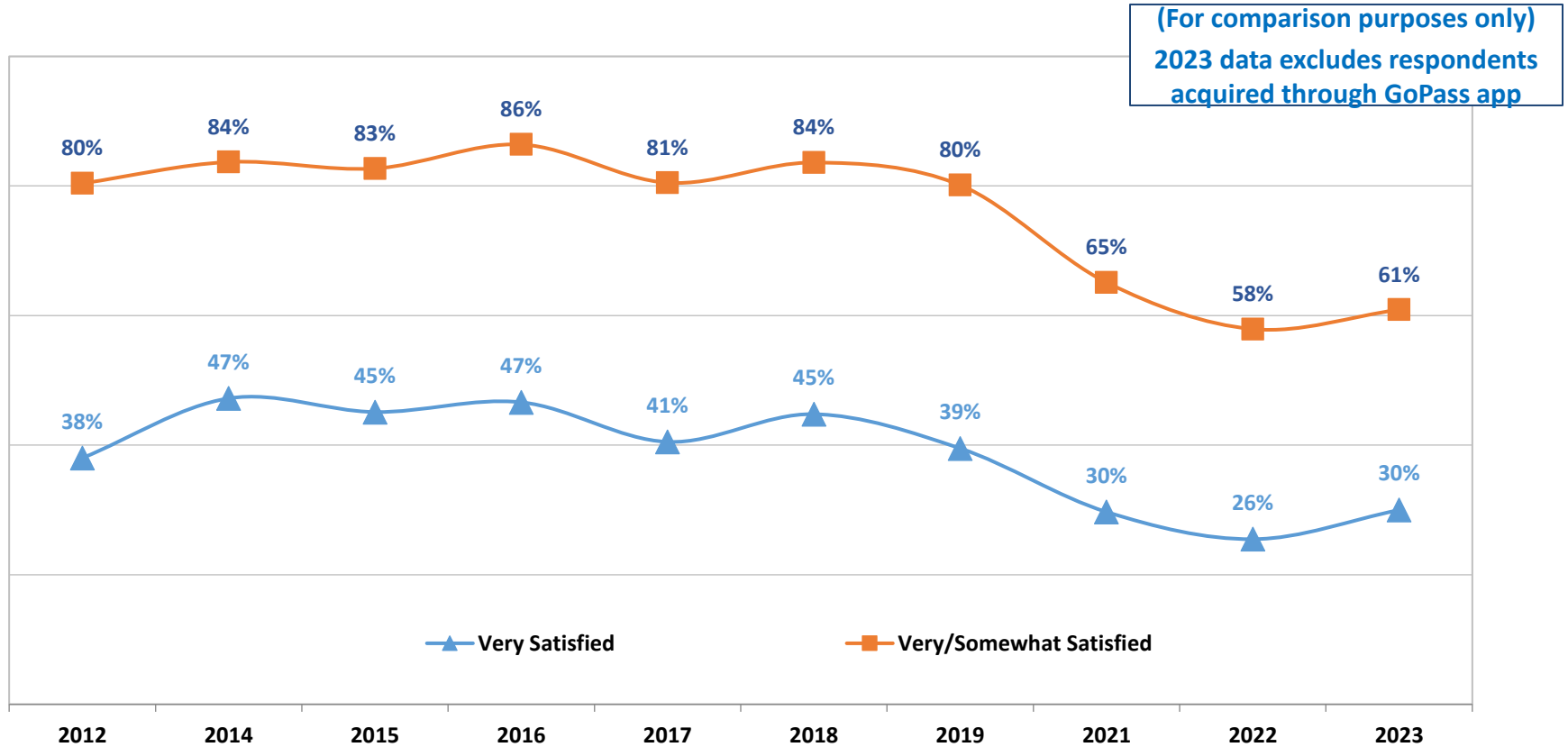|	2012	2014	2015	2016	2017	2018	2019	2021	2022	2023
Promoters	44%	47%	50%	51%	43%	45%	43%	40%	28%	34%
Passives	21%	23%	24%	28%	26%	26%	25%	26%	27%	28%
Detractors	36%	30%	26%	21%	30%	29%	32%	34%	44%	38%
NPS	8.1	17.6	23.7	29.1	13.3	15.3	10.7	6.6	(16.1)	(3.5)
Average 11-point scale	7.23	7.62	7.80	7.99	7.52	7.54	7.38	7.30	(16.10)	(3.50)

Q15. On a scale of 0 to 10, how likely are you to recommend using DART to friends or family members? (11-point scale, 0 to 10, *Extremely Likely* to *Not At All Likely*)

![DART]

Incidence of buses not showing up or stopping to pick up declined

How Often Experience Problems With Bus Not Showing Up At All

The percentages of respondents who have had problems with bus pick-ups increased more so among 18-24, dependent riders, and African Americans.

Legend: Very Often/Often (Net) — Very Often/Often/ Sometimes (Net) — Never

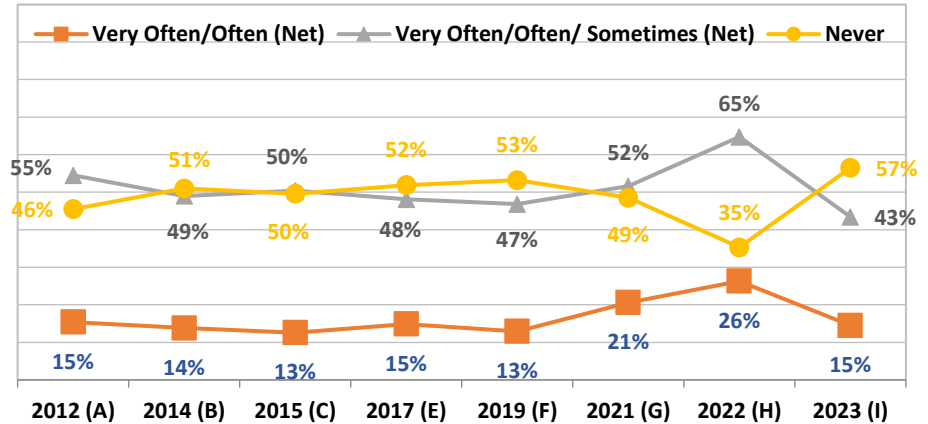|	2012 (A)	2014 (B)	2015 (C)	2017 (E)	2019 (F)	2021 (G)	2022 (H)	2023 (I)
Very Often/Often/Sometimes (Net)	55%	49%	50%	48%	47%	52%	65%	43%
Never	46%	51%	50%	52%	53%	49%	35%	57%
Very Often/Often (Net)	15%	14%	13%	15%	13%	21%	26%	15%

How Often Experience Problems With Bus Not Stopping to Pick Up

The percentages of respondents who have issues with bus pick-ups are increasing slightly among age 18-24, dependent riders, and African Americans.

Legend: Very Often/Often (Net) — Very Often/Often/ Sometimes (Net) — Never

	2012 (A)	2014 (B)	2015 (C)	2017 (E)	2019 (F)	2021 (G)	2022 (H)	2023 (I)
Very Often/Often/Sometimes (Net)	55%	49%	50%	48%	47%	45%	51%	43%
Never	46%	51%	50%	52%	53%	55%	49%	57%
Very Often/Often (Net)	15%	14%	13%	15%	13%	21%	18%	15%
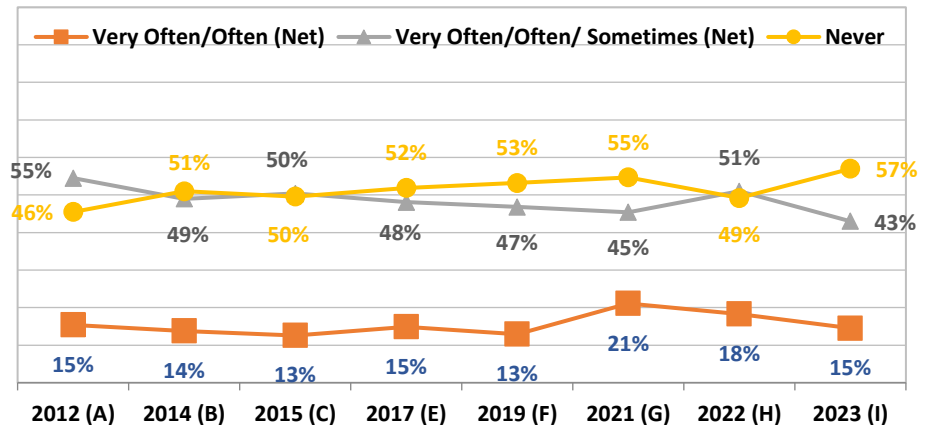
Note: This question was not asked in 2016 or 2018.
Q28. In the past 6 months, how often have you experienced a problem with your bus not showing up at all?

The proportion of riders who walk/bike to DART has reduced with the introduction of GoLink

Legend:
- Other
- DART paratransit services #
- DART GoLink #
- Rideshare
- Car pooled
- Dropped off by someone
- Drove alone
- Walked or bicycled

	2012	2014	2015	2016	2017	2019	2021	2022	2023
Other	7%	9%	7%		5%	9%	11%	5%	5%
DART paratransit services #									4%
DART GoLink #									5%
Rideshare	0%	0%	2%		2%	4%	5%	4%	4%
Car pooled	5%	4%	6%		3%	4%	5%	6%	8%
Dropped off by someone	10%	9%	9%		11%	9%	10%	11%	9%
Drove alone	11%	11%	17%		13%	14%	13%	12%	17%
Walked or bicycled	68%	66%	59%		66%	60%	56%	64%	49%

1) How did you travel to the location where you began your first DART trip today?

GoPass App continues to grow in adoption

5) How do you typically pay for your DART ride?

Legend: Other · Corporate · GoPass Tap Card · GoPass App · Contactless payment at the card reader · Cash

	2015	2017	2018	2019	2021	2022	2023
Other	9%	18%	19%	8%	2%	3%	4%
Corporate	2%	6%	5%	8%	3%	5%	4%
GoPass Tap Card					7%	7%	4%
GoPass App					19%	27%	31%
Contactless payment at the card reader	15%	15%	16%	35%	21%	12%	8%
Cash	73%	61%	60%	49%	48%	46%	50%

4) Where do you typically pay for your DART ride?

Legend: 2019 · 2021 · 2022 · 2023

	2019	2021	2022	2023
Bus	39%	39%	40%	44%
GoPass app	38%	33%	40%	37%
Train station (Ticket Vending Machine or card reader)	27%	31%	26%	42%
Employer/School	9%	7%	8%	6%
Retail location	3%	6%	5%	4%

DART let's go.

59

Dependent riders continue to outnumber choice riders

Legend: Dependent, Choice

Year	Dependent	Choice
2012	62%	38%
2014	61%	39%
2015	56%	44%
2016	52%	48%
2017	55%	45%
2018	56%	44%
2019	48%	52%
2021	55%	45%
2022	57%	43%
2023	52%	48%

1new) Which of the following describes you best?