



## Board Report

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### AD HOC CUSTOMER EXPERIENCE COMMITTEE JANUARY 18, 2018

**SUBJECT: CUSTOMER SATISFACTION SURVEY RESULTS**

**ACTION: RECEIVE AND FILE**

#### **RECOMMENDATION**

RECEIVE AND FILE status report on results of 2017 Customer Satisfaction Survey.

#### **ISSUE**

As part of the development of the Metro Strategic Plan (Plan), staff conducted a comprehensive customer satisfaction survey to better understand the transportation needs and concerns of Los Angeles County residents and workers. This report summarizes the key findings.

#### **BACKGROUND AND DISCUSSION**

Staff in the Office of Extraordinary Innovation and Countywide Planning and Development conducted a customer satisfaction survey to identify specific elements that affect customer satisfaction and assess relative importance of those elements to the customer. The survey included an online component and complementary focus group research to ensure adequate reach. The results of the survey will inform the development of an agency-wide Metro Strategic Plan and help Metro more effectively tailor services to our customers, which include all residents and visitors to Los Angeles County.

##### **Methodology**

###### ***Audience***

Staff conducted a large-scale online survey of transit riders and non-riders. The demographics of respondents were compared to previous Metro surveys and Los Angeles County Census data to confirm a representative sample. In addition, the agency conducted focus group research to provide a deeper dive into groups that are historically more challenging to engage, such as those with limited English proficiency and low income, elderly and minority populations.

###### ***Survey Administration***

Online Survey: Metro administered the online survey from June 1 - 30, 2017, distributing it through a combination of email invitations and targeted social media advertising on Facebook, with a goal of receiving 20,000 responses. The survey was also available in English, Spanish, Chinese, and

Korean languages, representing the most prevalent languages spoken in Los Angeles County. To incentivize participation in the survey, respondents were entered into a raffle drawing to win a prize.

Focus Group Research: Metro conducted focus group research to supplement the online survey in July and August 2017. This consisted of five focus groups, segmented primarily by language, including two groups conducted in English and one group each in Spanish, Chinese, and Korean. Metro conducted the English groups among two populations shown by prior research to have distinctive opinions on transit and transit equity issues: residents over the age of 50, and African Americans. Each focus group was comprised of a gender-balanced mix of nine to ten participants. The groups also included residents with varying degrees of education, Internet and social media usage, as well as those with physical or mental health conditions that affect daily life and mobility (disability).

### *Survey Design*

Online Survey: Staff designed the survey instrument to explore how and why respondents make transportation decisions by addressing the following areas:

- Transportation behaviors, including modes of transportation that respondents typically use, types of Metro transit services (e.g., bus, rail) that they use, frequency of usage, and why they use or do not use Metro transit services. Additional details are discussed below.
- Attitudes toward various attributes of public transportation, such as safety, reliability, travel time, comfort, access, and knowledge of how to use the system. This is further discussed below.
- Demographic information, including household income, age, gender, ethnicity, and employment status. For more details, see Attachment A.

The survey design includes a skip logic feature that enabled Metro to better tailor the relevant questions to the individual respondents. This shortens the length of time needed for participants to take the survey by providing only questions that are relevant to them, thus increasing the chances that they will complete the entire survey. Transportation profiles of the respondents were established through a series of questions towards the beginning of the survey to understand their transportation behaviors and their attitudes towards public transit, as described below.

- **Types of Metro transit services used** (i.e., use both bus and rail services, use bus services only, use rail services only, don't use Metro transit services). Although LA Metro offers a suite of services to meet the diverse needs of LA County residents and visitors, including rail and bus services, Express Lanes, regional bike share, among other services, this survey was designed specifically to gauge satisfaction with Metro's transit services as a starting point. By identifying specific attributes of transit that affect customer satisfaction and assessing the relative importance of those attributes to the respondents, Metro can identify opportunities to leverage other services that can complement the transit riders' experience or offer other mobility options that better suit the respondents' preferences and needs.
- **Frequency of transit usage** (i.e., frequent, occasional, infrequent, never). Based on the respondents' answers to frequency of transit usage, they were asked follow up attitude questions tailored to their previous responses. If respondents indicated that they use Metro transit services three times a week, Metro assumed that this was one of their primary modes of transportation;

therefore, they would be asked questions regarding why they choose to ride Metro and how Metro can better serve them. Respondents who indicated that they use Metro transit services one to two times a week were asked what improvements Metro could make to encourage them to ride more frequently. Any respondent who indicated that they do not use Metro transit services regularly, had never used Metro transit services, or stopped using these services were asked specific questions to help identify how they chose their current mode of transportation.

- **Customer Satisfaction and Priorities.** Previous survey studies undertaken by Metro focused on what problems affect Metro riders and non-riders, and reported the problems that were mentioned the most. This survey attempted to accomplish that same task while also asking for the respondent's main reason for using Metro transit services or the main improvement that would encourage them to use the services more often. The survey questions are designed to identify the main attributes, or factors, influencing respondents' travel decisions and the relative importance of those attributes. This approach provides Metro with insights into factors that are very important to customers and opportunities for Metro to focus and prioritize improvements and resources based on the customers' needs and preferences.
- **Overall opinions and perceptions of Metro transit services, using the net promoter score.** The net promoter score, which is widely used by many companies, is a metric used to gauge the customer's overall level of satisfaction with a company's services or products. For respondents who currently use Metro bus or rail, the survey includes a question asking about their likelihood to recommend Metro rail or bus to a friend or colleague.

### Findings

There were 18,198 total respondents to the online survey, with 16,446 survey takers who completed enough of the survey to be included in the segment analysis. Staff analyzed the survey results to identify key segments of users in Los Angeles County that may have similar travel characteristics.

#### *Key User Segment Characteristics*

Based on the results of the analysis, Metro identified the following seven key user segments and the characteristics of each group, including factors that drive their transportation decisions, demographics, level and frequency of transit usage, and willingness to promote Metro's services, which was quantified through the net promoter score. The user segments are listed below in order from most frequent Metro transit users to the least. The seven user segments make up 83% of survey respondents. The remaining 17% of respondents had myriad and disparate characteristics that could not be meaningfully classified into distinct categories. Attachment A provides a snapshot of the demographic makeup of each user segment.

- Savvy Transit Users (28% of respondents)
- No Hassle Travelers (11% of respondents)
- Frequent Bus Patrons (6% of respondents)
- Frequent Rail Patrons (5% of respondents)
- Drivers Who Occasionally Ride Rail (8% of respondents)
- High Potential Transit Users (20% of respondents)

- Previous Bus/Rail Riders (5% of respondents)

#### *Common Issues Across User Groups*

Common issues were identified across the different user groups, as described below. Findings from the focus group research generally corroborated those of the online survey, with the exception of perceptions around safety, which is further explained below.

- **Frequency, reliability and total trip time on bus:** Respondents across many user groups indicated that the primary reason they don't use Metro bus is because this service takes too long and is too slow. Many indicated that buses are slowed by automobile traffic, stuck at traffic lights, lack dedicated bus-only lane, and require too many transfers. The factors listed by respondents are inter-related and affect overall trip time. The lack of reliability and consistency of service influences their decisions to use other transportation options rather than taking Metro bus. A number of Savvy Transit Users and Frequent Bus Patrons who ride Metro bus one to two days a week indicated that more frequent bus service would encourage them to ride more often, with many preferring 5- or 10-minute frequencies during peak hours and 10- or 15-minute frequencies during off-peak hours.
- **Access to/from Metro rail:** Many respondents stated that access to and from Metro rail is difficult and indicated that rail stations are too far away from their home or destination. This was a main factor influencing their decision to use other modes of transportation.
- **New Metro rail lines to new places:** A number of respondents indicated that new rail lines to new places would be the primary reason influencing them to ride more often.
- **Safety concerns:** Although safety was a concern, it was not the main concern relative to other factors, according to respondents to the online survey. However, safety emerged as one of the top issues in the focus group research. Safety, for most participants, means protection from other riders. African American and Latino participants expressed significant concerns about racial profiling and discrimination by law enforcement and Metro fare-checking personnel when taking public transportation.
- **Better information:** Respondents expressed preferences for availability, clarity and accuracy of information regarding bus lines, transfers and arrival time per schedule or online apps.

#### Summary and Recommendations

Metro has the opportunity to leverage its suite of services to provide an outstanding complete trip experience. The agency operates numerous services designed to provide customers with a plethora of mobility options, including the use of buses, trains, regional bike share, and ExpressLanes, among other services. Based on people's attitudes about public transportation, key factors that influence their transportation choices, and demographic characteristics, Metro can tailor and match its suite of services to meet the needs and preferences of different segments of the market. Below are recommendations based on the findings from the online survey and focus group research.

*Improve Metro bus service to attract and promote more usage (frequency, reliability, travel time, transfers, information)*

Improvements to Metro's bus services, including enhancements to frequency, reliability, and travel time, as well as more accurate information, may enable Metro to further attract and promote more frequent usage. Despite respondents' proximity to bus services, many people did not feel that this was a viable form of transportation for them. Many expressed concerns that buses were too slow and took too long to get them where they wanted to go. Many respondents attributed this issue to buses operating on congested streets, being stuck at traffic lights, and lacking dedicated lanes that would prioritize bus travel. In addition, respondents were concerned about the need to make multiple transfers, which may further affect reliability, since wait time between transfers can contribute to uncertainty of the transit connections and add to the overall trip time for completing the journey.

This survey result can help Metro better understand the priorities of its customers in terms of what type of service performance and outcome they expect and identify strategies to deliver a world-class bus system that is effective, reliable and desirable for more people, for more trips. The results of this survey will inform the Metro Strategic Plan, which will identify key initiatives to further achieve this outcome and complement Metro's existing work, such as the NextGen Bus Study.

*Improve access and connectivity across the suite of mobility services to provide better choices for all user groups.*

Metro has an opportunity to improve the trip taking experience along the customer's entire journey, recognizing that multiple entities are involved in various aspects of that journey. A number of respondents indicated that access to and from Metro rail stations posed challenges to using rail service. More detailed assessments may be necessary to identify the specific challenges experienced by each user group in order to identify the applicable solutions. Metro's first last mile planning work generally looks at a 3-mile bike shed and one half-mile walk shed for infrastructure improvements to access transit; however, more research may be necessary to understand the types of challenges that customers face, including the distance they must travel to access the transit network, the integration and coordination of mobility services (e.g., rail and bus connections and intermodal transfers), and the quality of transportation infrastructure, which may help or hinder access. The emergence of on-demand rideshare services and micro-transit service models provides additional opportunities for Metro to enhance access to transit and pilot new mobility services that meet the needs of public transit customers. In addition, improvements to access, connectivity, and integration across the entire transportation network will be critical to provide seamless travel, whether people choose to walk, bike, take transit, use rideshare services, or drive. Metro has an opportunity to leverage its resources and influence to encourage public and private sector partners to be part of the solution to improve connectivity and integration of infrastructure (e.g., sidewalks, bikeways, transit facilities, highways, roadways, etc) and mobility services (e.g., rail service, bus service, bike share, Express Lanes, rideshare service, etc) to provide better choices for all user groups.

*Enhance Safety.*

A majority of the participants in the focus groups indicated that greater police presence and security cameras would increase their sense of safety. In 2017, Metro established a new security contract to put more police on Metro buses and trains. The agency is also working with social service agencies to get help for people who are on the Metro system and require support services. However, African American participants, and some Latino participants, raised substantial concerns about racial profiling and discrimination by police and fare inspectors. As Metro continues to identify ways to address safety and security for all users on the system, it is important that the agency be mindful of

the concerns of African American and Latino users.

*Expand Metro's ExpressLane Services.*

Travel time uncertainty is a significant factor in the decisions that people make regarding which modes to use for their transportation needs. ExpressLanes provide an option to mitigate uncertainties for those who choose to drive. This service is appealing to respondents who desire to control their work trips and avoid unknown factors. ExpressLanes currently operate on I-110 and I-10, but expansion of this program can provide solo drivers with more options for a reliable trip experience as well as improve highway flow for other users.

**NEXT STEPS**

Staff will continue to develop the Metro Strategic Plan and provide updates to the Board at key milestones throughout the process. Staff anticipates circulating the draft Plan for public comment in Winter 2018 and bringing the Plan for Board approval in Spring 2018.

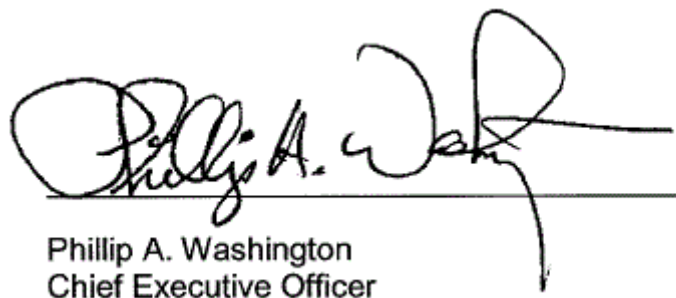
**ATTACHMENTS**

Attachment A - Snapshot of Demographic Makeup of Respondents by User Segment

Attachment B - 2017 Customer Satisfaction Survey Report

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