



Board Report

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Agenda Number: 37.

OPERATIONS, SAFETY, AND CUSTOMER EXPERIENCE COMMITTEE OCTOBER 20, 2022

SUBJECT: 2022 CUSTOMER EXPERIENCE SURVEY RESULTS

ACTION: RECEIVE AND FILE

RECOMMENDATION

RECEIVE AND FILE 2022 Customer Experience Survey Results.

ISSUE

Metro's annual Customer Experience (CX) Survey is used to develop an in-depth understanding of pain-points negatively impacting the customer experience. The CX Team then uses these insights learned from the survey to create strategic initiatives/action items that will address pain-points which will improve the customer experience.

The report presents the following information:

- 1) Highlight the CX survey results for 2022 including customer demographics in comparison to the last on-board intercept survey conducted in 2019 and customer satisfaction ratings for different aspects of service. The 2022 survey covered 25 aspects of service with 12,239 customer ratings with a 63% response rate.
- 2) Provide an update on the 2022 CX Action Items, as included in the 2022 CX Plan.

BACKGROUND

In 2018, the Metro Board of Directors passed Motion 38.1 (2018) that established the annual Customer Experience Plan to develop a comprehensive approach for improving customer satisfaction. One of the specific initiatives was to use data and analytics to benchmark and measure system performance in meeting customer satisfaction targets. The Customer Experience Surveys are an essential source of insight into the customer experience to better understand our riders' experience, prioritize investments, and track trends over time to gauge success.

A brief timeline of customer experience-related events at Metro is provided below since the adoption of Board Motion 38.1 (2018):

- April 2020 - Metro established the Customer Experience team by hiring its first Executive Officer of Customer Experience.
- October 2020 - the first Customer Experience Survey was administered via online survey

- December 2020 - the first Customer Experience Plan was adopted.
- October 2021 - Due to the pandemic, a 2021 CX Survey was not conducted and a 2021 CX Plan was forgone in place of a Board presentation and update.
- April 2022 - the second CX plan was filed with the Board. The plan included results from the 2020 CX Survey analyzed using Quadrant Charts to identify and prioritize target issues based on customer satisfaction and importance as well as provided a fiscally constrained list of CX Action Items, unlike in the first 2020 CX Plan.
- July 2022 - the CEO established the Customer Experience Department hiring the first Chief Customer Experience Officer (CXO).

As we continue our efforts to improve the customer experience, this data helps us understand the evolving needs and priorities of our customers. As one of several surveys administered by Metro, we conduct this survey to provide further insight into the demographics and ridership preferences of Metro customers. The survey was designed to help us understand:

- Who is currently riding Metro?
- What is Metro doing right vs. what we need to improve for the customer experience?
- Identify pain-points needed to be prioritized for our riders.
- Track Metro's progress overtime by comparing these results to the 2020 CX Online Survey.
- Evoke conversations with internal stakeholders around aspects to improve the customer experience.

DISCUSSION

The 2022 Customer Experience Survey was conducted in March - May 2022. Now that many pandemic restrictions have lifted, we conducted intercept surveys on-board bus, rail and Micro with riders vs. our 2020 online survey.

Results are based on 12,239 completed surveys. Data is weighted to ensure that the findings reflect the demographic composition of current Metro riders to ensure representation.

Metro uses the 2022 Customer Experience survey to prioritize and phase customer experience investments for the FY24 budget and to identify pain points to be addressed in the 2023 Customer Experience Plan. Survey findings are reviewed and analyzed using a method incorporating customer satisfaction and importance.

KEY FINDINGS:

Age: Increase in riders

Age:

- An average of 67% of Metro riders fall between the ages of 25-64 years old, which is a 6% increase from 2019.
- Under 18 segment of riders shows a decrease from 11% in 2019 to 7% in 2022.

Ethnicity:

- Statistically unchanged from pre-Pandemic (2019), Latinx/Hispanic is the largest ethnic group equaling 58% of riders, while African Americans are second largest at 14% (slightly down from 16% in 2019).

Languages Spoken at Home:

- 52% of surveyed bus/rail riders said that they speak English at home, and 42% reported that they speak Spanish.
- 77% of our riders speak English well or very well, while 23% speak it not well or not at all.
- We included 9 languages in addition to English and Spanish for our survey questionnaire.

Gender Identity:

- Female identifying **Bus** riders decreased from 53% in 2019 to 49% in 2022.
- Female identifying **Rail** riders also decreased slightly, from 46% in 2019 to 44% in 2022.

Household Earnings:

- 83% (81% in 2019) of riders reported making a household income of under \$50,000, while those making \$50,000 or more made up 17% (20% in 2019) of respondents.

Type of Fare:

- The One-Trip fare and 30-Day Pass, both at 32%, are the two most used fare types by our users. That is a decrease from 2019 of 20 percentage points (52%) for One-Trip fare and an increase of 13 percentage points (19%) for the 30-Day Pass.

Fare Discount Type:

- For reported fare discount type, the LIFE fare tripled from 8% in 2019 to 25% in 2022. This corresponds with the increase in marketing the LIFE program.

Technology Use and Fare Payment:

- 79% of riders own smartphones with available data. That is an increase of 19% from 2019 (60%). Relatedly, 73% pay with TAP, of which 10% use the TAP smartphone app since its launch in September 2020..

Ridership:

- Customers who ride Metro at least three (3) days per week have declined by 10% from 2019 to 78% in 2022.
- Access to a car has increased from 21% in 2019 to 27% in 2022. Increases in gas prices at the time of the survey may have aided these increases.

Bus & Rail Overall Perceptions:

- 58% of **Rail** riders are satisfied with Metro which is a small decrease of 1% since 2020.

- 60% of **Bus** riders reported being satisfied with Metro which is a 7% decrease from 2020.

Bus & Rail Target Issues:

2022 Customer Experience Survey Top Five (5) Target Issues	
Rail	Bus
How well Metro addresses homelessness on trains	Cleanliness inside the bus
Cleanliness inside the train	Bus comes on time
Cleanliness of train stations	Enough room on the bus
Safety from crime	How frequently buses run
Enforcement of Metro Rules	Enforcement of Metro rules

Rail & Bus Target Issues - Female Customers:

When looking at the 2022 results specifically for female-identifying survey respondents, many of the are the same for bus. For rail, homelessness, cleanliness, and safety all ranked higher.

2022 Customer Experience Survey Top Five (5) Target Issues - Female Responses	
Rail	Bus
How well Metro addresses homelessness on trains	Cleanliness inside the bus
Cleanliness inside the train	Accurate and timely information about delays
Cleanliness of train stations	Bus comes on time
Safety from crime	
Safety from sexual harassment	

Metro Micro:

2022 is the first year the CX Survey included Metro Micro. Overall, Metro Micro had high levels of customer satisfaction for the aspects of service measured. The target issues listed below scored higher than bus and rail.

1. Micro comes on time
2. How quick I was able to get a ride
3. Availability of accurate info to plan my trip
4. How long it takes to get where I am going
5. Availability of accurate real-time info

CUSTOMER EXPERIENCE ACTION ITEM UPDATES:

A brief update highlighting some successes and that are related to the 2022 CX Survey target issues include:

- **Vinyl Seats Transition** - the transition from cloth to easier-to-keep-clean vinyl seats has made significant progress. As of August, 49% of buses and 89% of rail cars have been installed with vinyl seats.
- **Cleaning Surge (end of line, midday bus, trackway, and escalators)** - enhanced cleaning efforts by various maintenance and contract services have been underway since 2020.
 - End of Line cleaning campaign continues to happen on the Red/Purple lines where litter is removed and wipe downs of seats and poles occur while the train is docked at the end of a line.
 - Midday bus interior cleaning was expanded to three layover locations, reaching over 1,600 buses in the month of July focused on retrieving pieces of trash, cleaning spills, removing graffiti, and wiping down surfaces and seats.
 - Trackway debris removal is occurring bi-weekly at seven (7) high priority stations, with other Red/Purple line station trackways being cleaned at least once a month.
 - Escalator step cleaning was increased to four times per year effective July 2021 and has been maintained at that frequency.
- **Metro Ambassadors Program** - the Metro Ambassadors Program achieved two significant milestones. In June, the Board approved the award of \$122 million to enlist two vendors, Strive Well-Being and RMI International, Inc to provide Transit Ambassador program services. In September, Metro developed and directed a comprehensive two-week pre-deployment training on customer service, public safety awareness, de-escalation, trauma informed response, emergency preparedness, and transit operations for the first group of Ambassadors.

EQUITY PLATFORM

The Customer Experience Survey results are used to identify pain points of our customers that are used to inform the upcoming 2023 Customer Experience (CX) Plan. The 2022 CX Survey was administered in nine (9) different languages, in addition to English and Spanish. A training was administered to surveyors to offer the survey to all Metro riders including those with disabilities.

The CX Plan recommends a range of initiatives that would benefit marginalized communities, low-income households, people with disabilities, and Equity Focus Communities (EFCs). Previously, the 2022 CX Plan included a specific chapter on Diverse Riders, Diverse Needs and the upcoming Plan will include the same chapter to build upon current projects and recommend future actions.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

Metro is working to create a customer-centric/customer-first culture amongst all employees to improve customer experiences for its riders. Therefore, the 2022 CX Survey supports strategic plan goals:

- Goal #1: “Invest in a world class bus system that is reliable, convenient, and attractive to more users for more trips.”
- Goal #2: “Deliver outstanding trip experiences for all users of the transportation system.”

NEXT STEPS

These latest survey results will be the basis for updating customer profiles and identifying CX initiatives throughout Metro that are aimed at improving the customer experience. FY24 budget documents will highlight customer experience initiatives recommended in the 2023 Customer Experience Plan and developed in response to 2022 Customer Experience Survey results.

ATTACHMENTS

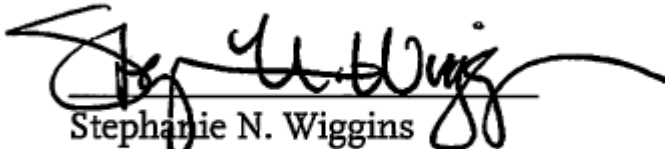
Attachment A - Board Report - Motion 38.1 Response

Attachment B - 2022 Metro Customer Survey

Attachment C - 2022 Metro Customer Survey Results

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