Metro

Board Report

Los Angeles County
Metropolitan Transportation
Authority
One Gateway Plaza
3rd Floor Board Room
Los Angeles, CA

Metro

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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

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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

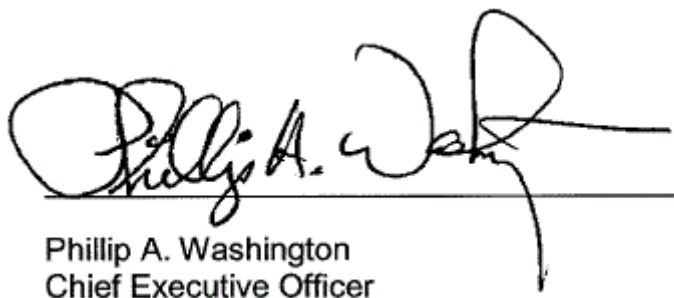Attachment A - Snapshot of Demographic Makeup of Respondents by User Segment
Attachment B - 2017 Customer Satisfaction Survey Report

Prepared by: Tham Nguyen, Senior Manager, Transportation Planning, (213) 922-2606
            Nadine Lee, Deputy Executive Officer, (213) 418-3347

Reviewed by: Joshua Schank, Chief Innovation Officer, (213) 922-5533

Phillip A. Washington
Chief Executive Officer

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

	Savvy Transit Users	No Hassle Travelers	Frequent Bus Patrons	Frequent Rail Patrons	Drivers Who Occasionally Ride Rail	High Potential Transit Users	Previous Bus/Rail Riders	Other*
Total Number of Respondents	4,606	1,792	970	828	1,323	3,320	746	2,861
% of Total Respondents	28%	11%	6%	5%	8%	20%	5%	17%
Gender:								
Male	49%	53%	41%	47%	41%	44%	46%	
Female	50%	46%	58%	52%	59%	56%	53%	
Trans FTM	0.32%	0.47%	0.34%	0.26%	0.00%	0.37%	0.31%	
Trans MTF	0.40%	0.24%	0.45%	0.00%	0.00%	0.13%	0.47%	
Age:								
< 18	1%	0%	2%	0%	0%	0%	0%	
18-24	17%	11%	16%	13%	6%	7%	14%	
25-34	30%	32%	24%	36%	29%	21%	32%	
35-49	27%	28%	26%	26%	30%	31%	30%	
50-64	20%	22%	25%	22%	25%	29%	19%	
65 or older	5%	7%	6%	3%	10%	11%	4%	
Employment Status:								
Employed full-time	50%	67%	48%	75%	67%	59%	59%	
Employed part-time	17%	11%	16%	9%	10%	14%	11%	
Full-time student and working	10%	8%	9%	6%	3%	4%	9%	
Full-time student and not working	6%	2%	9%	2%	2%	3%	4%	
Unemployed (seeking employment)	5%	3%	5%	3%	4%	5%	6%	
Unemployed (not seeking employment)	1%	1%	1%	0%	1%	1%	1%	
Retired	5%	6%	5%	3%	9%	10%	4%	
Stay at home parent or caregiver (full-time)	2%	1%	3%	0%	3%	3%	3%	
Disabled	5%	1%	5%	0%	1%	1%	4%	
Annual Household Income:								
Under $20,000	30%	11%	27%	7%	6%	10%	20%	
$20,000-$29,999	15%	8%	14%	6%	4%	8%	10%	
$30,000-$39,999	12%	7%	11%	6%	6%	7%	11%	
$40,000-$49,999	8%	9%	8%	9%	7%	8%	10%	
$50,000-$59,999	7%	9%	7%	9%	8%	9%	9%	
$60,000-$69,999	5%	7%	7%	8%	9%	6%	6%	
$70,000-$79,999	5%	8%	6%	7%	7%	8%	7%	
$80,000-$89,999	3%	7%	3%	8%	7%	6%	5%	
$90,000-$99,999	3%	5%	3%	6%	7%	6%	4%	
$100,000 or more	12%	28%	12%	34%	39%	32%	17%	
Ethnicity:								
Latino	33%	18%	30%	17%	10%	19%	33%	
African American	11%	8%	10%	4%	3%	6%	8%	
White	35%	53%	40%	58%	66%	53%	32%	
Asian/Pacific Islander	11%	13%	12%	13%	14%	14%	15%	
Native American	3%	2%	2%	1%	1%	2%	3%	
Other	7%	6%	6%	6%	6%	6%	8%	

*Consist of remaining respondents who could not be meaningfully classified into distinct categories.

Unpacking Customer Satisfaction:
Customer Satisfaction Survey Results

Summer 2017

Metro

Table of Contents

List of Tables

INTRODUCTION

The Los Angeles County Metropolitan Transportation Authority (Metro) seeks to better understand the transportation needs and concerns of Los Angeles County residents and workers. Metro 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

Metro 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. The online survey was administered from June 1 - 30, 2017, and distributed through a combination of email invitations and social media, such as targeted Facebook ads, with a goal of receiving 20,000 responses. The survey was administered online using Facebook Ads Manager, which is a self-service tool that enables Metro to create and manage advertisements on Facebook. The ads targeted people 18 years old and older living in Los Angeles County, based on user profiles and behavior data from Facebook's social media platform. 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 contracted with Evitarus, a public opinion research and public policy consulting firm, to design and conduct focus group research that can supplement the online survey. The research was conducted in July and August 2017, and consisted of five focus groups, segmented primarily by language, including two groups conducted in English and one group each in Spanish, Chinese, and Korean. The English groups were conducted 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/Blacks. 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. Metro 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;
- **Attitudes** toward various attributes of public transportation, such as safety, reliability, travel time, comfort, access, and knowledge of how to use the system;
- **Demographic information**, including household income, age, gender, ethnicity, and employment status.

The complete list of survey questions is in Appendix A. The survey design includes a skip logic feature that enabled Metro to better tailor the relevant questions to the individual respondents. Appendix B provides an outline of the skip logic feature and sequencing of questions. 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. In order to identify attributes that may be specific to rail or bus services, a series of questions specific to rail usage were asked first, followed by questions specific to bus.

- **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, since Metro assumed that there may be opportunities to encourage increased usage. 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. Below is an overview of survey question design around the frequency of transit usage, which then leads to tailored questions related to attitudes about various attributes of public transit.

  o *Infrequent/Non-riders*: For respondents who never rode Metro transit or used it infrequently, questions were designed to identify the respondents' modes of travel, frequency at which they use those modes, reasons for not using Metro transit, main reasons for using their current mode of transportation rather than using Metro transit, and suggested actions that Metro can take to encourage their patronage of Metro transit services. The survey questions are designed to identify the main attributes, or factors, influencing these respondents' travel decisions, types of improvements that could attract these respondents to Metro transit services, or opportunities to match them with other mobility services beyond Metro rail or buses.

  o *Current riders*: For current Metro riders, questions were designed to understand the factors (e.g., convenience, traffic, cost, lack of car availability, etc) that influence their decision to use Metro rail or bus, relative importance of those factors, purpose of their trips, and likelihood that they would recommend Metro rail or bus services to a friend or colleague. For respondents who ride less than three days a week, follow up questions were designed to identify actions and improvements that would encourage them to ride more often (e.g., more frequent service, more reliable service, more late-night service, better information, better access to transit, etc) as well as identify the highest priority improvement that would increase their usage.

  o *Previous riders*: For respondents who previously rode Metro rail and/or bus, but no longer use these services, questions were designed to identify how long they rode the Metro system before they stopped, their current modes of travel, frequency at which they use those modes, main reasons for using their current mode of transportation rather than using Metro transit, and suggested actions that Metro can take to encourage their patronage again.

- **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. Their response options are shown on a sliding scale of zero, which indicates not at all likely to recommend Metro rail or bus, to 10, which indicates extremely likely to recommend the service. The respondents' answers are used to calculate the net promoter score, which is divided into three groups, as shown in Table A. It is calculated by subtracting the percentage of detractors (scores of six or lower) from the percentage of promoters (scores of nine and ten). Passive scores are not factored into the calculation in this case. The goal is to increase the number of promoters and decrease the number of detractors.

Table A. Net Promoter Score Range

Score range	Customer perception
0 to 6	Detractor: customer holds a negative opinion of the service
7 to 8	Passive: customer has a neutral or passive opinion of the service
9 to 10	Promoter: customer holds a positive opinion of the service and would be willing to promote it

Focus Group Research. The focus group research was designed to supplement the online survey, with a specific focus on demographic subgroups that may have been unrepresented or underrepresented in the survey's sample. The full report on this research is in Appendix C.

ANALYSIS AND RESULTS

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. Metro analyzed the survey results to identify key segments of users in Los Angeles County that may have similar travel characteristics, based on respondents' answers to questions that assess their transportation behaviors, attitudes towards various attributes of public transit, and their likelihood of using Metro transit services. Appendix D provides an overview of the questions and responses used to categorize these user segments. The focus group research was not included in the user segment analysis due to the much smaller sample size and the objective of reaching targeted, unrepresented or underrepresented, demographic populations.

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 (e.g., age, gender, ethnicity, household income, employment status), 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 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. Net promoter scores were not available for *Drivers Who Occasionally Ride Rail, High Potential Transit User, or Previous Bus/Rail Rider* groups since they use Metro transit services very infrequently. Table B provides a snapshot of the demographic makeup of each user segment. For a more detailed summary of the demographic makeup, see Appendix E.

Table B. Snapshot of Demographic Makeup of Respondents by User Segment

	Savvy Transit Users	No Hassle Travelers	Frequent Bus Patrons	Frequent Rail Patrons	Drivers Who Occasionally Ride Rail	High Potential Transit Users	Previous Bus/Rail Riders	Other*
Total Number of Respondents	4,606	1,792	970	828	1,323	3,320	746	2,861
% of Total Respondents	**28%**	**11%**	**6%**	**5%**	**8%**	**20%**	**5%**	**17%**
Employed full-time	50%	67%	48%	75%	67%	59%	59%	
Annual Household Income: Less than $50,000	65%	36%	61%	28%	23%	33%	52%	
Annual Household Income: More than $100,000	12%	28%	12%	34%	39%	32%	17%	
African American/ Latino	44%	26%	40%	20%	13%	25%	42%	

*Consist of remaining respondents who could not be meaningfully classified into distinct categories.

Savvy Transit Users (28% of respondents)
- Transportation decisions driven by convenience, cost, and transit-dependency.
- Likely to live close to rail station (60% of respondents in this group live within a 20-minute walk of a station).
- Very diverse transit trip purposes: 20-40% of them ride Metro bus and rail three or more times a week for school, groceries, personal errands, and/or other non-work trips.
- Approximately 39% of them ride primarily because they do not have a car or driver's license.
- Highest percentage of Latino and Black respondents of all segments.
- Less likely to be employed full-time than other segments, except for *Frequent Bus Patrons* group.
- Lowest household income of all segments.
- Net Promoter Score is 21% for rail, which is surpassed only by the *No Hassle Traveler* group.

No Hassle Travelers (11% of respondents)
- Transportation decisions driven by convenience, traffic, trip reliability, strong preference for consistent travel time, and travel speed.
- Likely to live close to rail station (62% of respondents in this group live within a 20-minute walk of a station).
- Only segment with a higher percentage of men than women (53% versus 46%, respectively).
- Second most likely of all groups to be employed (86% employed at least part-time). Much more likely to have a full-time job. Likely to be commuters.
- Sixteen percent more likely to have household income over $100,000 per year than *Savvy Transit Users*.
- Diverse range of household incomes.
- Net promoter score of 26% for Metro rail, which is the highest of any user group. They are more likely to praise Metro rail to their friends and colleagues and be a champion of Metro rail service than any other rider segment, even though most of them have other mobility options.

Frequent Bus Patrons (6% of respondents)
- Transportation decisions driven by cost, transit-dependency, and close proximity to bus stops.
- Likely to live far from rail stations.
- Very diverse transit trip purposes: 18-30% of them ride Metro buses three or more times a week for school, groceries, personal errands, or other non-work trips.
- Third highest percentage of total Latino and Black respondents of any group.
- Tend to be younger (under 25 years old) or older (over 50 years old) compared to other groups.
- Second highest percentage of female respondents of any group.
- Lower income. Tied with *Savvy Transit Users* for lowest percentage of households making over $100,000 per year.
- They are more likely to be satisfied with Metro bus service, think their bus is generally on time, and feel safe while waiting for and riding Metro buses than the *Savvy Transit Users*. Yet, they are more likely to be in the middle of the net promoter score spectrum and have a neutral or passive opinion of Metro's transit service.

Frequent Rail Patrons (5% of respondents)

- Transportation decisions driven by the fact that Metro rail provides them an opportunity to avoid driving in traffic.
- Likely to live near Metro rail station (59% of respondents in this group live within a 20-minute walk of a station)
- Many of them are high frequency users who recently started using Metro rail. More likely to ride Expo and Gold Lines and less likely to use all other rail lines compared to the *Savvy Transit Users*.
- Second highest percentage of white respondents of any group.
- One of the top percentages of any group to be of prime working age (age 25-49).
- Wealthiest of all groups that ride at least once a week. Most likely to be employed (91%) and employed full time (75%).
- Nearly three times as likely as *Savvy Transit Users* to have household income of $100,000 or more.
- More likely to have neutral or passive opinion regarding Metro rail. They have the lowest Metro rail net promoter score of any group, at 16%, but there is still 16% more promoters than detractors.

Drivers Who Occasionally Ride Rail (8% of respondents)

- Transportation decisions driven by trip reliability and a desire to control their work trips and avoid unknown factors, such as traffic levels, transfer wait times, and parking availability.
- Concerned with safety, comfort, and knowledge of Metro bus system.
- Likely to live far from Metro rail station. They overwhelming feel that Metro rail is too hard to access (e.g., too far from their house, too far from where they want to go, and lacks parking at stations).
- Ninety-seven percent of them drive alone at least once a month but only 65% of their total trips are single occupancy vehicle trips.
- Highest percentage of white respondents of any group.
- One of the top percentages of any group to be retired.
- Highest percentage of female respondents (59%) of any group.
- Wealthiest of all user groups. Fifteen percent more likely than the survey average to have annual household income of more than $100,000 and 21% less likely to make under $40,000.

High Potential Transit Users (20% of respondents)

- Transportation decisions driven by convenience, ease of use, and travel speed.
- Most feel that Metro rail is fast but very hard to access. Sixty-one percent of them list access as the main reason they do not ride Metro rail.
- Most agree that Metro bus is fine in terms of safety and cleanliness. However, 54% of them list long travel time and slow speed as the main reason they do not ride Metro bus.
- Currently ride both Metro bus and rail but use neither service more than once a month.
- Fifty-six percent of their total trips around Los Angeles County are done by driving alone; however, this group has a diverse travel profile consisting of:
    - 21% walking
    - 7% dropped off by friend or family member
    - 5% using Uber/Lyft
    - 5% biking
- Forty percent of respondents in this group are 50 years or older and 10% of them are retired, both of which are the highest percentage compared to any other groups.
- More likely to be female (56%) than survey average.
- Diverse range of household incomes.
- Unlikely to hold extreme positive or negative views of transit.

Previous Bus/Rail Riders (5% of respondents)

- Transportation decisions driven by cost, convenience, and safety.
- Feel more strongly about safety compared to other groups.
- Large percentage of respondents used to ride for school.
- Heavy mode switch to single-occupancy vehicles despite previously being frequent Metro transit user.
- Thirty-five percent of people in this segment previously rode Metro rail at least three or more times a week for school. For 18-24 year old Latinos in this bracket, 91% previously rode three or more times a week for school.
- Of the white women who stopped riding rail, 23% listed safety as the main reason. This statistic is 19% for bus riders. More than half of this group had previously ridden Metro bus and rail five or more times a week for various lengths of time before leaving the Metro transit system.
- Second highest percentage of total Latino and Black respondents and lowest percentage of White respondents of any group.
- Most likely to be of prime working age (25-49) compared to other groups. Six percent more likely to be under 35 years old than survey average.

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. Thirty-three percent of *Savvy Transit Users* and 27% of *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.

Respondents across many user groups, including *High Potential Transit Users, No Hassle Travelers, Drivers Who Occasionally Ride Rail, Frequent Rail Patrons, and Previous Bus/Rail Riders,* 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.

Access to/from Metro rail. Sixty-one percent of *High Potential Transit Users,* 58% of *Drivers Who Occasionally Ride Rail,* 67% of *Frequent Bus Patrons,* and 45% of *Previous Bus/Rail Riders* stated that access to and from Metro rail is difficult, with many respondents indicating that rail stations are too far away from their home or destination. Access to and from Metro rail stations were main factors that influence their decision to use other modes of transportation rather than Metro rail.

New Metro rail lines to new places. Thirty-one percent of *Savvy Transit Users,* 39% of *No Hassle Travelers, and 35% of Frequent Rail Patrons* who ride one to two days a week indicated that new rail lines to new places would be the primary reason influencing them to ride more often.

Safety concerns. Respondents to the online survey, across all user groups, indicated that safety on Metro bus and/or rail was a concern. When asked to identify the main reason or top improvement that they prioritize, many respondents ultimately listed other service attributes. Although safety was a concern, it was not the main concern relatively to other factors, according to respondents to the online survey. However, safety emerged as one of the top issues in the focus group research. Participants in each focus group identified safety as one of their top concerns about Metro rail and buses. Safety, for most participants, means protection from other riders. By all indications, participants' concerns about safety appeared to stem from a combination of their personal experiences on Metro rail and bus, and stories about crime passed from person-to-person by word of mouth. African American/Black 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.

Customer Satisfaction and Priorities

Table C provides an overview of the respondent's level of satisfaction with various elements of Metro's transit services and the level of importance they place on those elements, for each user segment. The information included and its placement on the quadrant in Table C is based on a variety of questions aimed at assessing the respondent's level of Metro transit usage, overall perceptions of Metro bus and rail services, and the respondent's primary concerns regarding those services. Table D provides an overview of the questions that were asked in the survey to identify the main reason or top improvement that users prioritize.
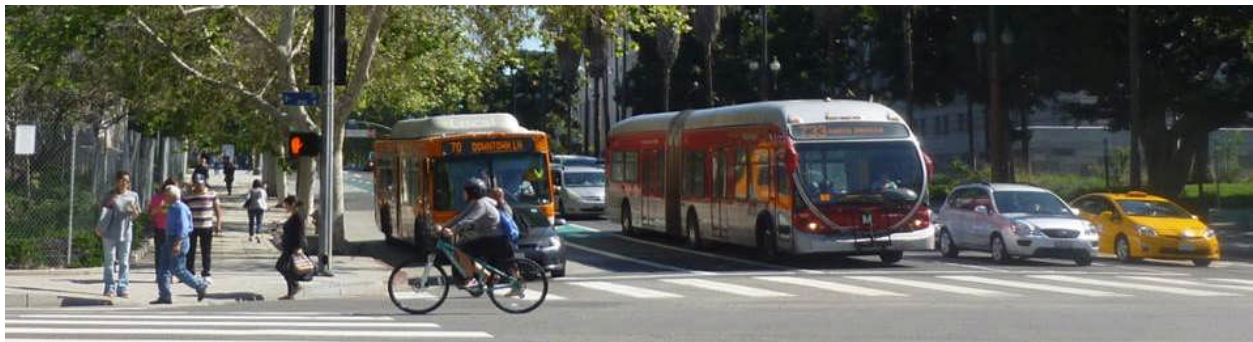
Table C. Customer Priorities and Level of Satisfaction

Savvy Transit Users (28% of Respondents)

Very Satisfactory	• Environmental benefit. • Affordable parking. • Convenient flat-rate fare. • Ability to be productive while riding. • Bus stops are near home.	• Ease of use. • Avoids traffic. • Affordable solution for those who cannot afford a car and driver's license.
Respondents' Views on Metro's Service	• Availability and accuracy of information on <u>next train</u> arrival time according to schedule or to app. • Fare discounts for low-income riders. • Presence of transit police on trains and at stations. • Cleanliness of buses and trains.	• Availability and accuracy of information regarding <u>next bus</u> arrival time according to schedule or app. • Metro system goes to places that they want to go. • Frequency of bus service. • Frequency of late-night service. • Consistency and reliability of bus headways.
Unsatisfactory		
	Important	Very important

Importance to Respondents

12

No Hassle Travelers (11% of Respondents)

	Important	Very important
Very Satisfactory	• Ability to be productive while riding. • Environmental benefit. • Access to clear information about the Metro system.	• Affordability (including the flat-rate fare). • Avoids traffic.
Respondents' Views on Metro's Service **Unsatisfactory**	• Frequency of service and of late-night service. • Availability of parking at Metro rail stations. • Metro transit police presence on trains and at stations. • Availability and accuracy of information regarding next bus and train arrival time according to schedule or to app.	• Metro rail goes to more places that they want to go. • Total trip time by bus

Importance to Respondents

Frequent Bus Patrons (6% of Respondents)

Very Satisfactory	• Avoids traffic. • Easy to use.	• Distance from Metro bus stop to home. • Metro buses go everywhere they want to go. • Affordability.
Respondents' Views on Metro's Service	• Clear and accessible information about the Metro system. • Lighting and security cameras at bus stops.	• Distance from Metro rail stations to home. • Access to ticket vending machines (TVMs) and places to buy fare on TAP. (Most likely of all user segments to pay with cash fare rather than a pass or TAP stored value)
Unsatisfactory		
	Important	Very important

Importance to Respondents

Frequent Rail Patrons (5% of Respondents)

Very Satisfactory	• Affordability of parking.	• Relief from the stress of driving and traffic. • Distance from Metro rail stations to home. • Metro rail system is expanding.
Respondents' Views on Metro's Service	• Availability of free parking. • Police presence on Metro bus and rail.	• Slow speed of Metro buses. • Making transfers to complete journeys. • Clear information about bus lines and bus transfers.
Unsatisfactory		
	Important	Very important

Importance to Respondents

Drivers Who Occasionally Ride Rail (8% of Respondents)

	Important	Very important
Very Satisfactory	• Affordability of parking.	• Avoids traffic.
Respondents' Views on Metro's Service	• Safety • Cleanliness • Comfort	• Getting to and from Metro rail stations. • Total trip time by rail. • Speed of Metro buses. • Making transfers to complete journeys.
Unsatisfactory		

Importance to Respondents

High Potential Transit Users (20% of Respondents)

	Important	**Very important**
Very Satisfactory	• Safety • Reliability • Cleanliness	• Avoids traffic. • Fast speed of Metro rail. • Bus stops are located near home and work.
Unsatisfactory	• Clear and accessible information about where to make Metro rail transfers. • Presence of transit police at stations, in trains, and buses. • Availability and accuracy of information on next bus and train arrival time according to schedule or to app. • Accurate and reliable signage on buses.	• Access to and from Metro rail stations. • Total trip time by bus. • Number of bus transfers required for a journey. • Clear and accessible information about where to make Metro bus transfers.

Respondents' Views on Metro's Service

Importance to Respondents

Previous Bus & Rail Riders (5% of Respondents)

	Important	Very important
Very Satisfactory	• Easy to use. • Awareness of safety apps and emergency call buttons at Metro rail stations and in trains. • Ability to make short trips for entertainment or for personal errands.	• Ability to get to and from school. • Consistency of Metro rail. • Avoids traffic.
Respondents' Views on Metro's Service		
Unsatisfactory	• Safety on buses. • Availability and accuracy of information regarding next bus and train arrival time according to schedule or to app. • Reliable arrival times.	• Safety on rail, especially for young women. • Access to and from Metro rail. • Total trip time on Metro bus, especially in making transfers or dealing with competing automobile traffic. • Presence of transit police on bus and rail.

Importance to Respondents

Table D. Questions to Identify the Main Reason or Top Improvement That Users Prioritize

Rail	Bus

If you ride Metro Rail 3 or more times a week	**If you ride Metro Buses 3 or more times a week**

Q25 **What is the MAIN reason you ride Metro Rail?**
It is convenient for me to use
I do not want to drive in traffic
It is cheaper than the cost of parking
I do not have a car available to use
I do not have a driver's license
It is good for the environment

Q88 **What is the MAIN reason you ride Metro Buses?**
It is convenient for me to use
I do not want to drive in traffic
It is cheaper than the cost of parking
I do not have a car available to use
I do not have a driver's license
It is good for the environment

If you ride Metro Rail 1-2 times a week	**If you ride Metro Buses 1-2 times a week**

Q38 **What is the #1 IMPROVEMENT that would encourage you to ride Metro Rail more often?**
More frequent service
More reliable service
More late-night service
More weekend service
New rail lines to new places
Lower fares
Improved customer amenities
Better information
More security on trains
More security at stations
Cleaner trains
Cleaner stations
Better access TO stations when I am walking
Better access FROM stations to my final destinations when I am walking
More parking available at stations

Q98 **What is the #1 IMPROVEMENT that would encourage you to ride Metro Buses more often?**
More frequent service
More reliable service
More late-night service
More weekend service
Lower fares
Improved customer amenities
Better information
More security on buses
More security at bus stops
Cleaner buses
Cleaner bus stops
Better access TO bus stops when I am walking
Better access FROM bus stops to my final destinations when I am walking

If you ride infrequently, have never ridden, or previously rode Metro Rail	**If you ride infrequently, have never ridden, or previously rode Metro Buses**

Q7 & Q62 **What is the MAIN reason you use your CURRENT mode of transportation instead of Metro Rail?**
Metro Rail takes too long/is too slow
Metro Rail is not reliable
It is too hard to get to and from Metro Rail
I do not feel safe using Metro Rail
I am not comfortable on Metro Rail
I do not know enough about Metro Rail to feel confident riding

Q74 & Q118 **What is the MAIN reason you use your CURRENT mode of transportation instead of Metro Buses?**
Metro Buses take too long/are too slow
Metro Buses are not reliable
It is too hard to get to and from Metro Bus stops
I do not feel safe using Metro Buses
I am not comfortable on Metro Buses
I do not know enough about Metro Buses to feel confident riding

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/Black 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/Black 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.

ACKNOWLEDGMENTS

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APPENDICES

Appendices can be accessed online:
http://libraryarchives.metro.net/DB_Attachments/180103_Attachment%20C_Appendices.pdf

Appendix A – Complete list of survey questions
Appendix B – Outline of the skip logic feature and sequencing of questions
Appendix C – 2017 Customer Satisfaction Focus Groups, Final Report
Appendix D – Overview of the questions and responses used to categorize these user segments
Appendix E – Detailed Summary of Demographic Makeup of Respondents by User Segment

LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY
OFFICE OF EXTRAORDINARY INNOVATION

2017 Customer Satisfaction Survey Results

Ad Hoc Customer Experience Committee
January 18, 2018

CUSTOMER SATISFACTION SURVEY

- **Gauge customer satisfaction** at all Metro touch points

- **Identify specific attributes** that affect customer satisfaction

- **Assess relative importance** of customer satisfaction attributes

- **Advise Metro Strategic Plan** vision, mission, goals, and initiatives

SURVEY ADMINISTRATION

Administration:

- Online deployment via Facebook ads and email

- Available in English, Spanish, Chinese, Korean

- Focus group research to engage hard-to-reach populations

Audience:

- Riders and non-riders

- Mirror demographics of LA County

- Online component: 18,198 respondents

- Focus groups: low income, elderly and minority populations

SURVEY DESIGN

- Transportation behaviors (status of transit usage, modes used, frequency of usage, willingness to recommend Metro services)

- Attitudes towards attributes of public transportation (e.g. safety, reliability, travel time, comfort, access, cost, etc.)

- Demographic information (e.g. household income, age, gender, ethnicity, employment status)

KEY USER SEGMENTS

- Savvy Transit Users (28%)

- No Hassle Travelers (11%)

- Frequent Bus Patrons (6%)

- Frequent Rail Patrons (5%)

- Drivers Who Occasionally Ride Rail (8%)

- High Potential Transit Users (20%)

- Previous Bus/Rail Riders (5%)

- Other (17%)

Metro

COMMON ISSUES ACROSS USER GROUPS

- Frequency, reliability and total trip time on bus

- Access to/from Metro rail

- New Metro rail lines to new places

- Safety concerns

- Better Information

RECOMMENDATIONS

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

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

RECOMMENDATIONS

- Enhance safety and be mindful of the concerns of African American and Latino users

- Expand ExpressLanes to provide an option to mitigate uncertainties for those who choose to drive

NEXT STEPS

Winter-Spring 2018:

- Board staff briefing on draft Metro Strategic Plan
- Release draft plan for public review
- Conduct stakeholder outreach
- Prepare strategic plan final document

Spring 2018:

- Seek Board approval