

# Customer Experience

*Fixed Route Customer Experience – Wave 1*

February 2023





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# Fixed Route Results Overview

**71%** of customers are satisfied with bus service.

TARC's Fixed Route Net Promoter Score is **16**.

## Customers are MOST satisfied with...



- ▶ Buses being operated safely (89%)
- ▶ Conveniently located bus routes (83%)
- ▶ Buses being operated on the days needed (80%)

## Customers are LEAST satisfied with...



- ▶ Bus stop cleanliness (37%)
- ▶ Bus cleanliness (56%)
- ▶ On-time Performance (56%)
- ▶ Ease and convenience to purchase bus passes (57%)

## Top Most Important Elements of Bus Service to Customers:

1. On-time performance
2. Fare price
3. Bus frequency
4. Travel time

# Methodology

## *Fixed Route Bus*



Targeted customers riding or waiting for the bus throughout the day to obtain a representative sample based on latest TARC ridership data.



Surveyed every 4<sup>th</sup> customer to ensure random sampling.



Results are accurate at 95% confidence with a margin of error of  $\pm 4.8\%$ .



**414** customers surveyed



6 days in the field  
*February 9 – 14, 2023*



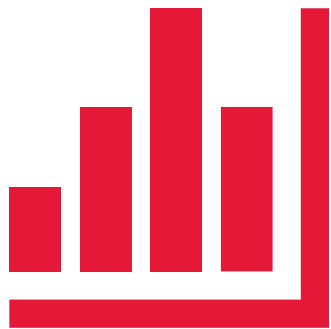
Administered by trained, local surveyors using Android tablets.



Customers were incentivized to participate by entering a raffle to win a gift card.

# Methodology

## *Industry Sampled Average (ISA)*



- When available, results are compared to TransPro’s industry database, containing fixed route survey data from transit agencies like CATS, RTC, RTD, Cherriots, and others.
- Industry averages are calculated using a 2-year rolling average to ensure averages are representative of the current market.
- For agencies containing multiple survey wave results, TransPro only uses the latest survey results in the database to ensure that the Industry Sampled Average (ISA) is not skewed towards a specific agency.

# Survey Results



# Fixed Route Bus





# Customer Characteristics

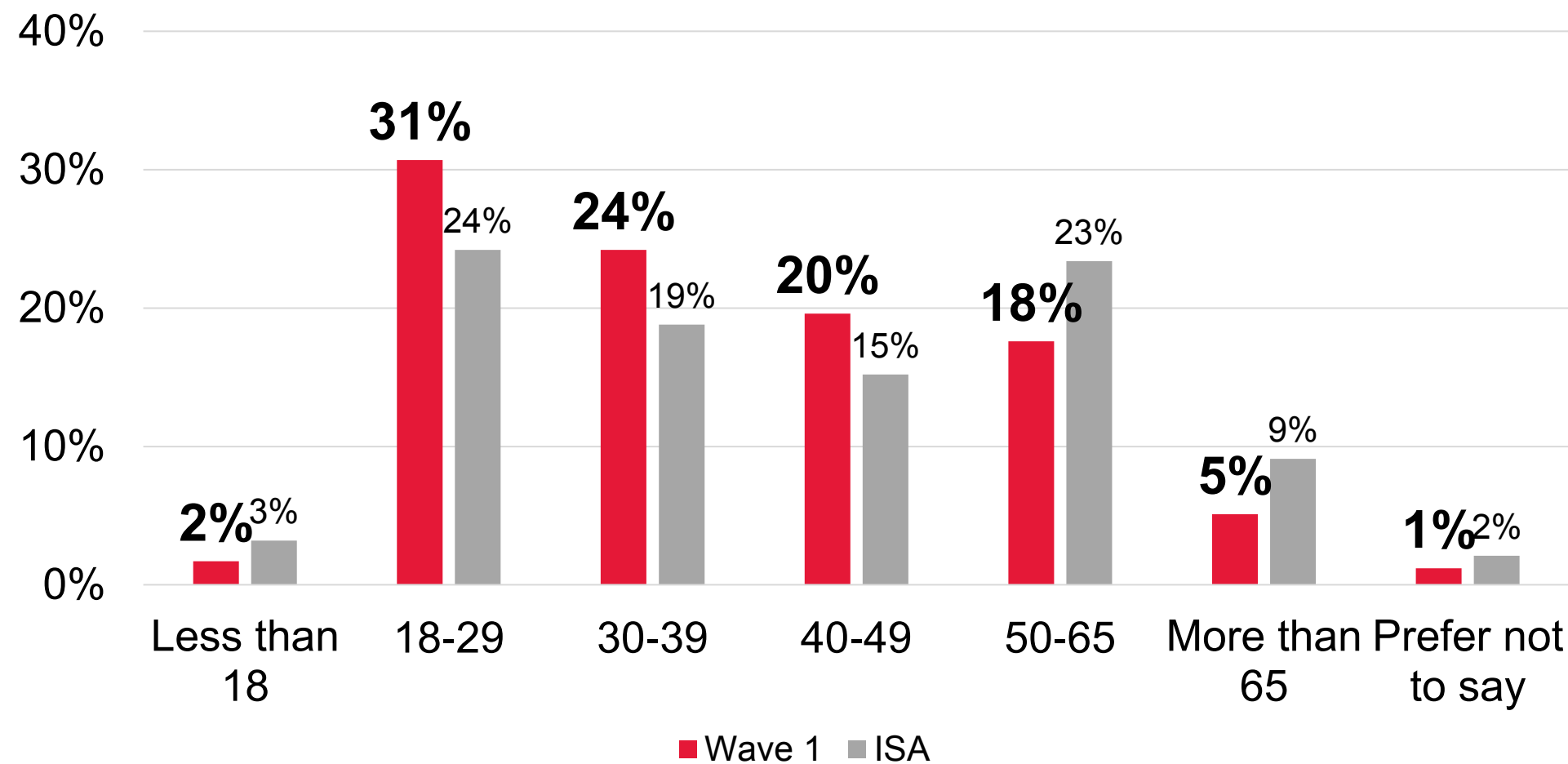




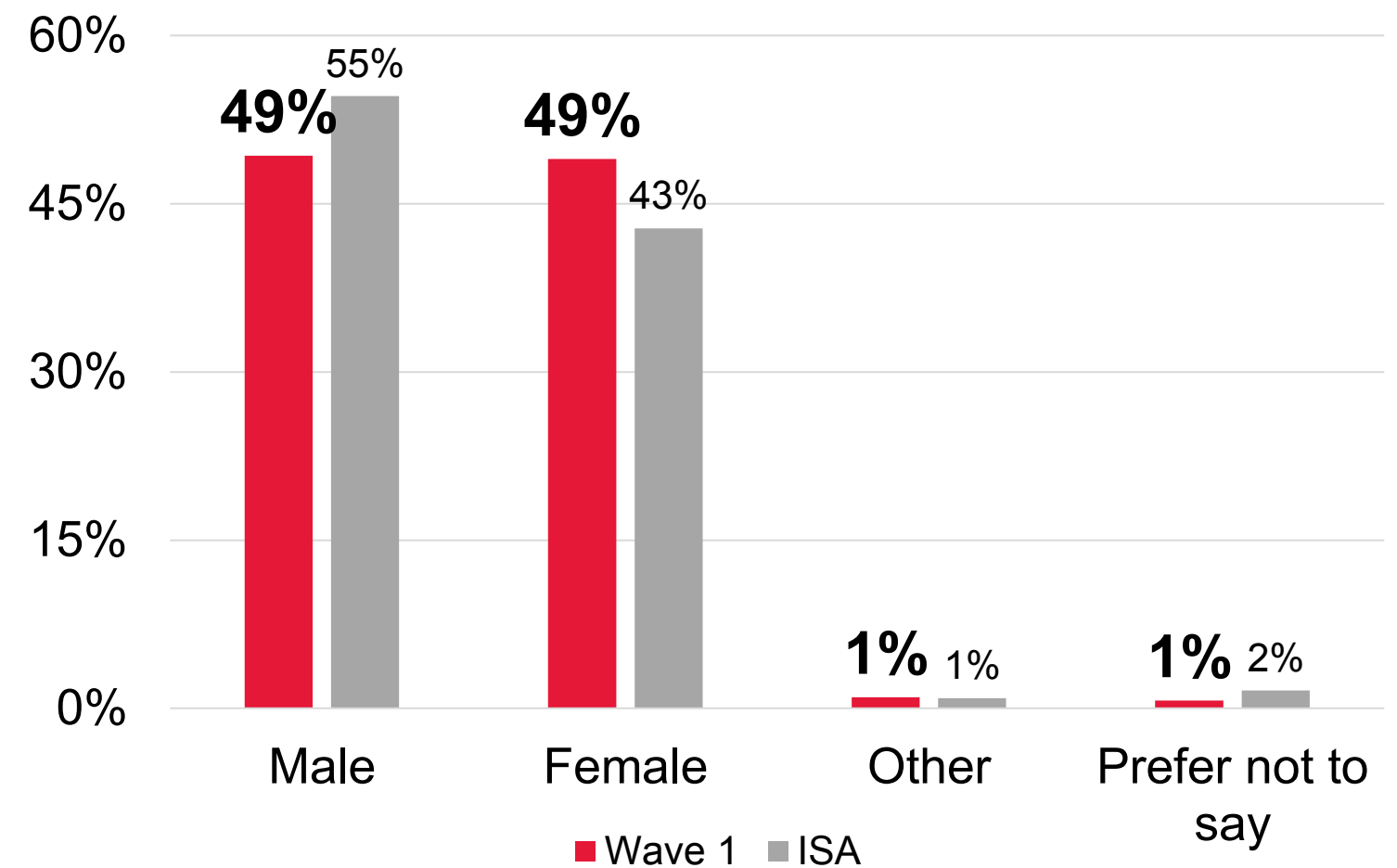
# Age and Gender

- TARC’s customers are **younger**, on average, than the ISA. 57% are below 40, while the ISA has only 45%.
- TARC’s customers are **evenly split between male and female**.
- More of TARC’s customers are female (49%) than the ISA (43%).

Age



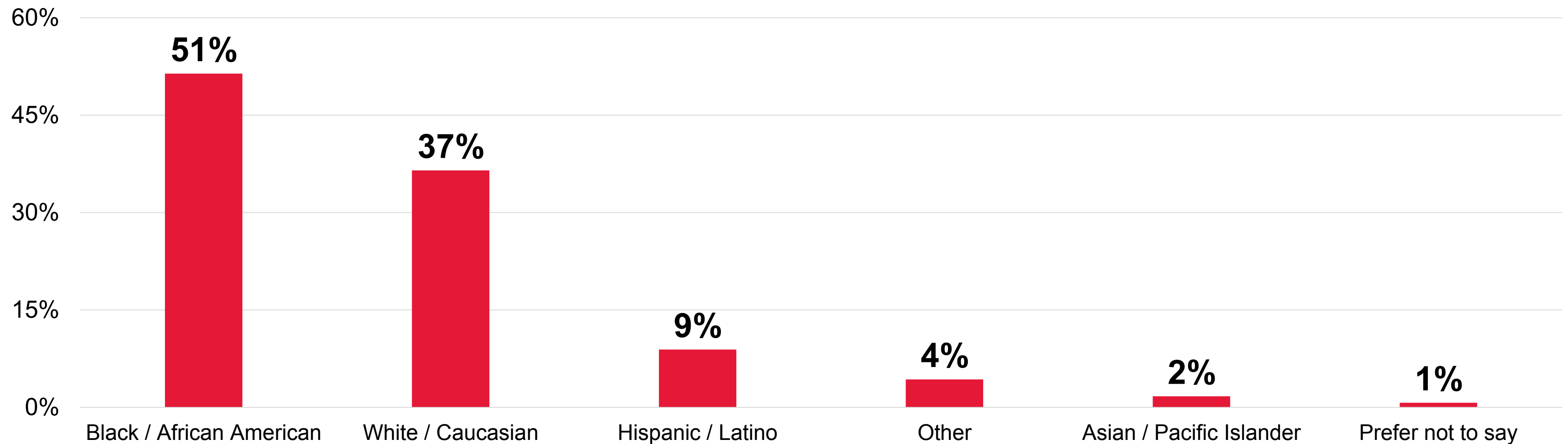
Gender



# Race/Ethnicity

- **Over half of TARC's customers are Black/African American (51%).**
- More than a third are White/Caucasian (37%).

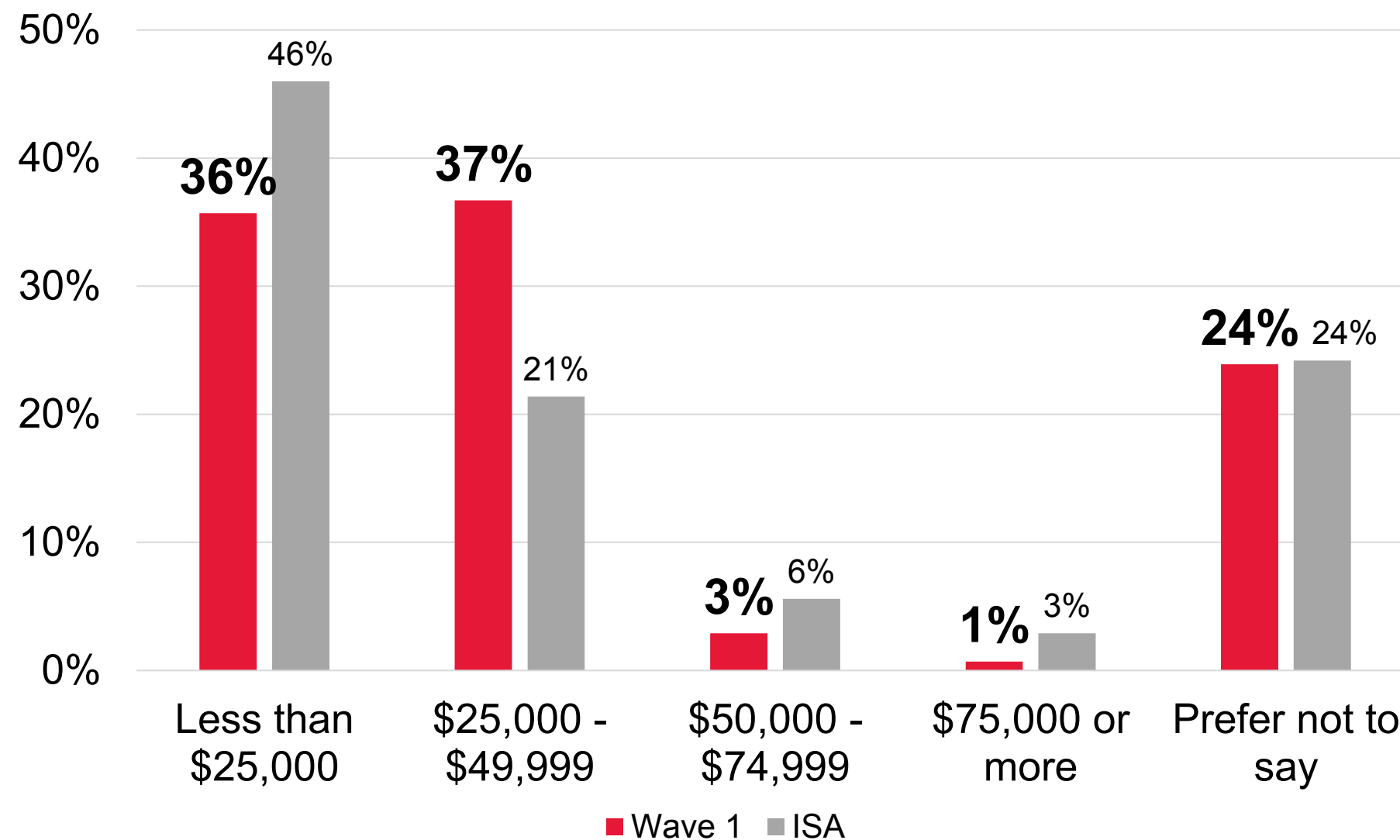
Race/Ethnicity



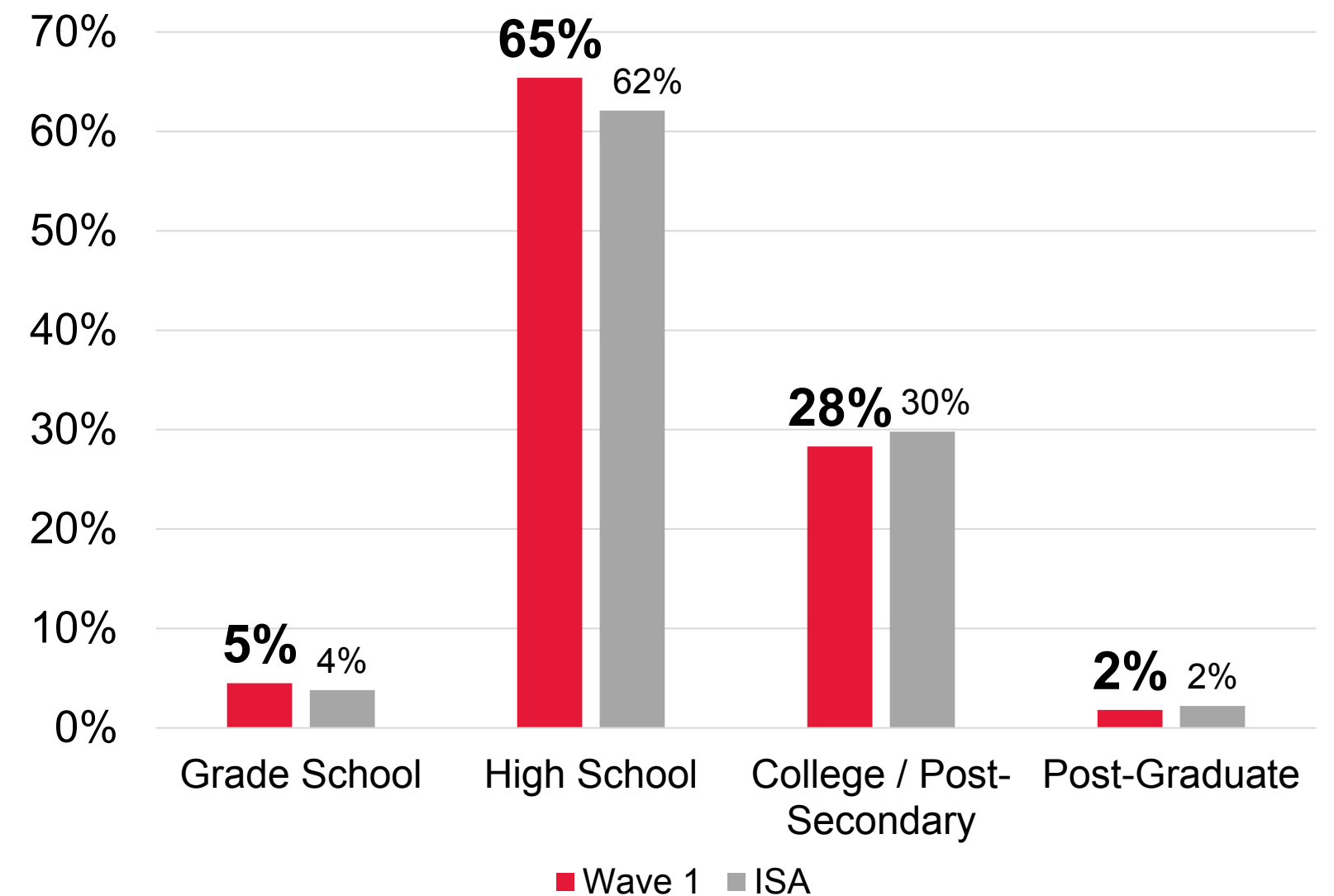
# Income and Education

- Over 70% of TARC customers make less than \$50,000 annually.
- TARC's customer education level distribution is almost equal to the ISA.

**Annual Income Range**



**Last School Level Completed**

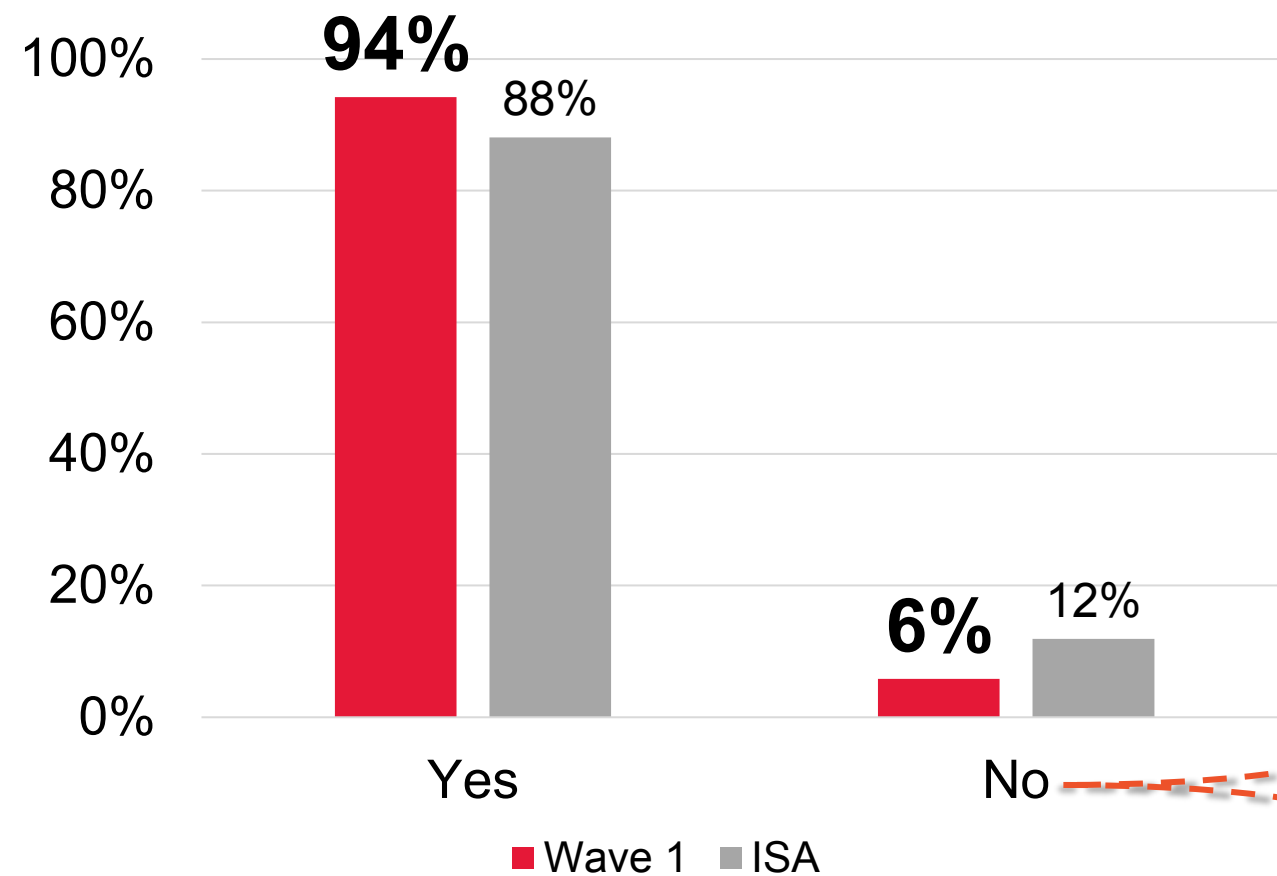




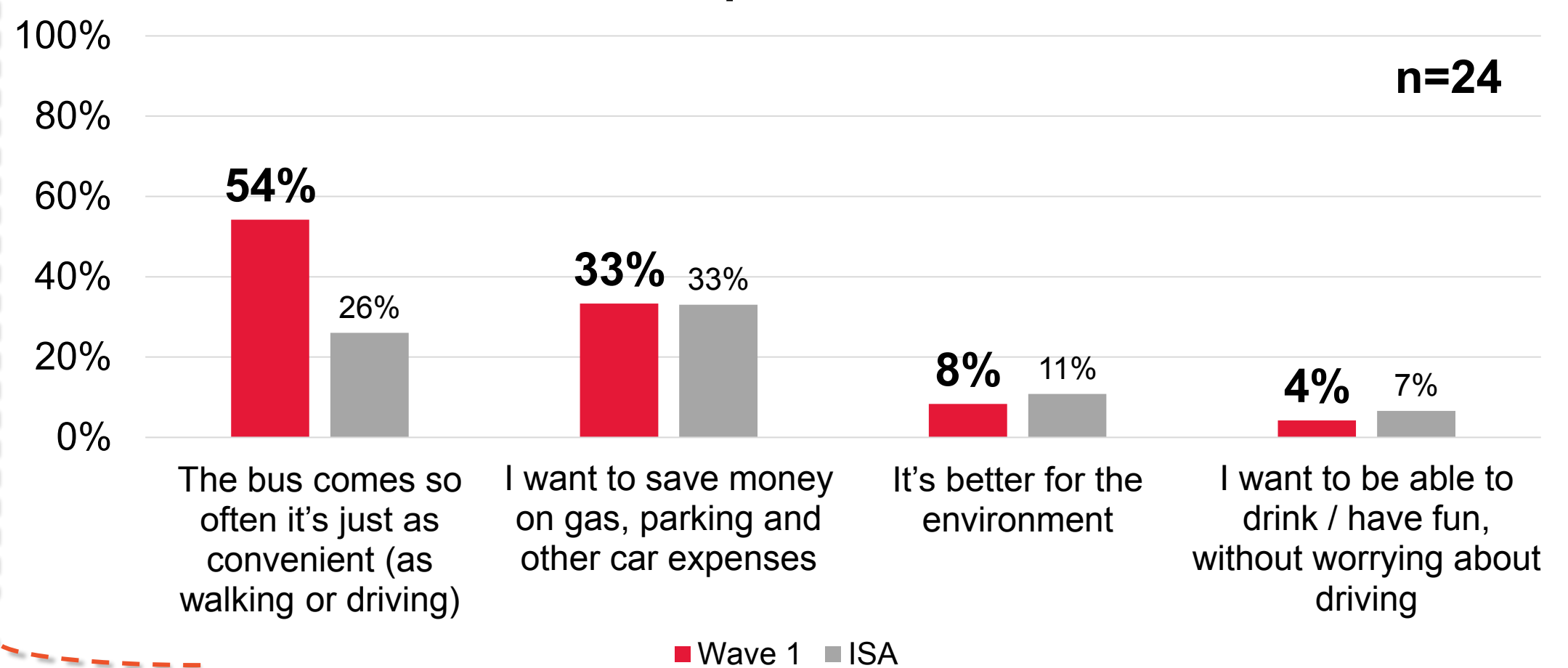
# Transit Dependency and Choice Riders

- **94% of customers are dependent on TARC**, 6 percentage points higher than the ISA.
- 24 customers said they choose to ride TARC. Over half of those **choose TARC because it is just as convenient as walking or driving**.

**Are you dependent on using TARC buses to and from your destination?**



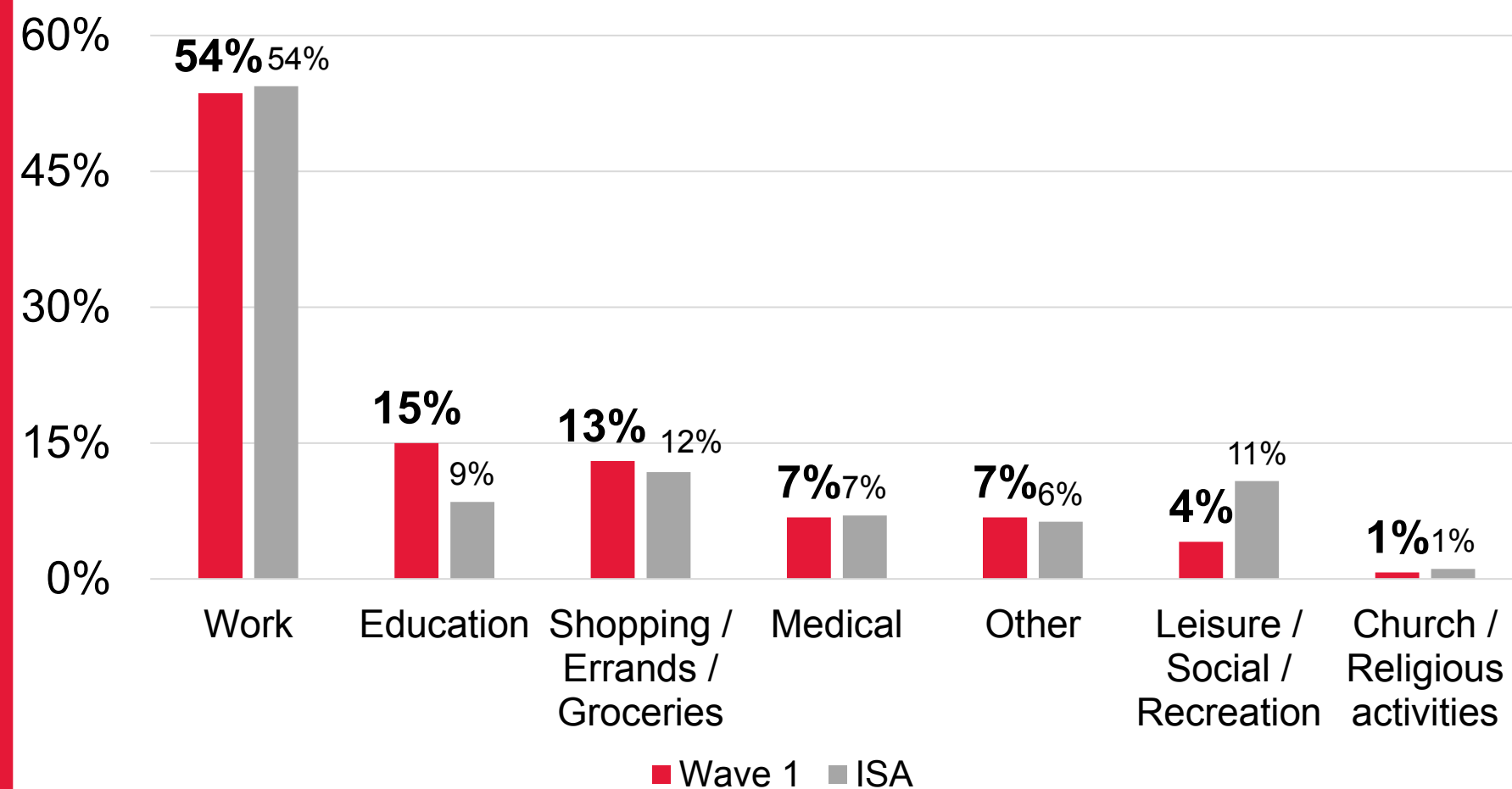
**What is the #1 reason you choose public transportation?**



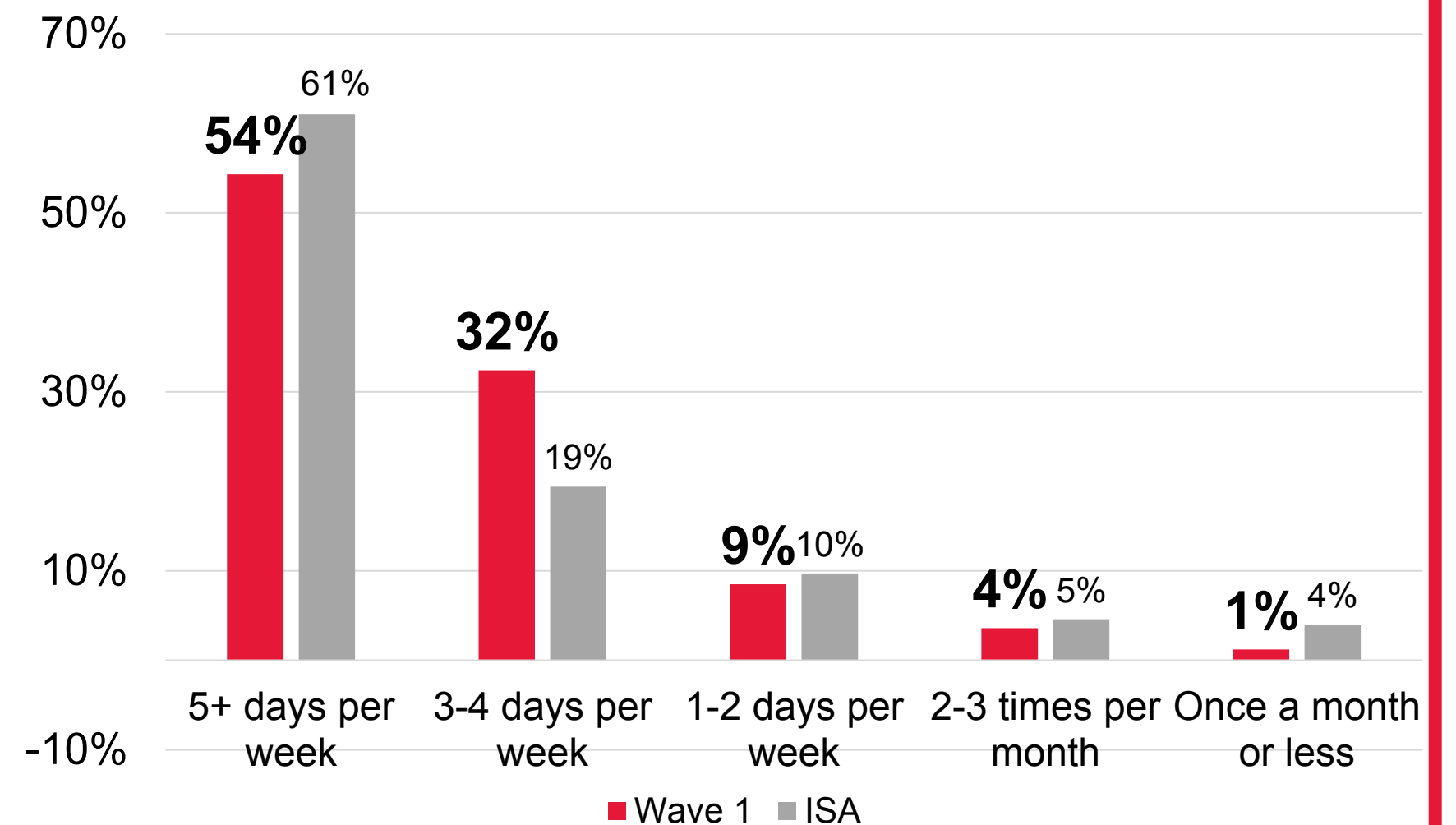
# Purpose and Frequency

- Customers primarily ride TARC for work. **15% use TARC for education**, higher than the ISA (9%). **Only 4% use TARC for leisure/social/recreation**, 7 percentage points below the ISA (11%).
- Most customers ride the bus 5+ days a week, but a **large portion (32%) ride 3-4 days per week**, higher than the ISA (19%).

**For what primary purpose do you ride TARC buses most frequently?**



**How often do you ride the bus?**





# Customer Impressions and Satisfaction



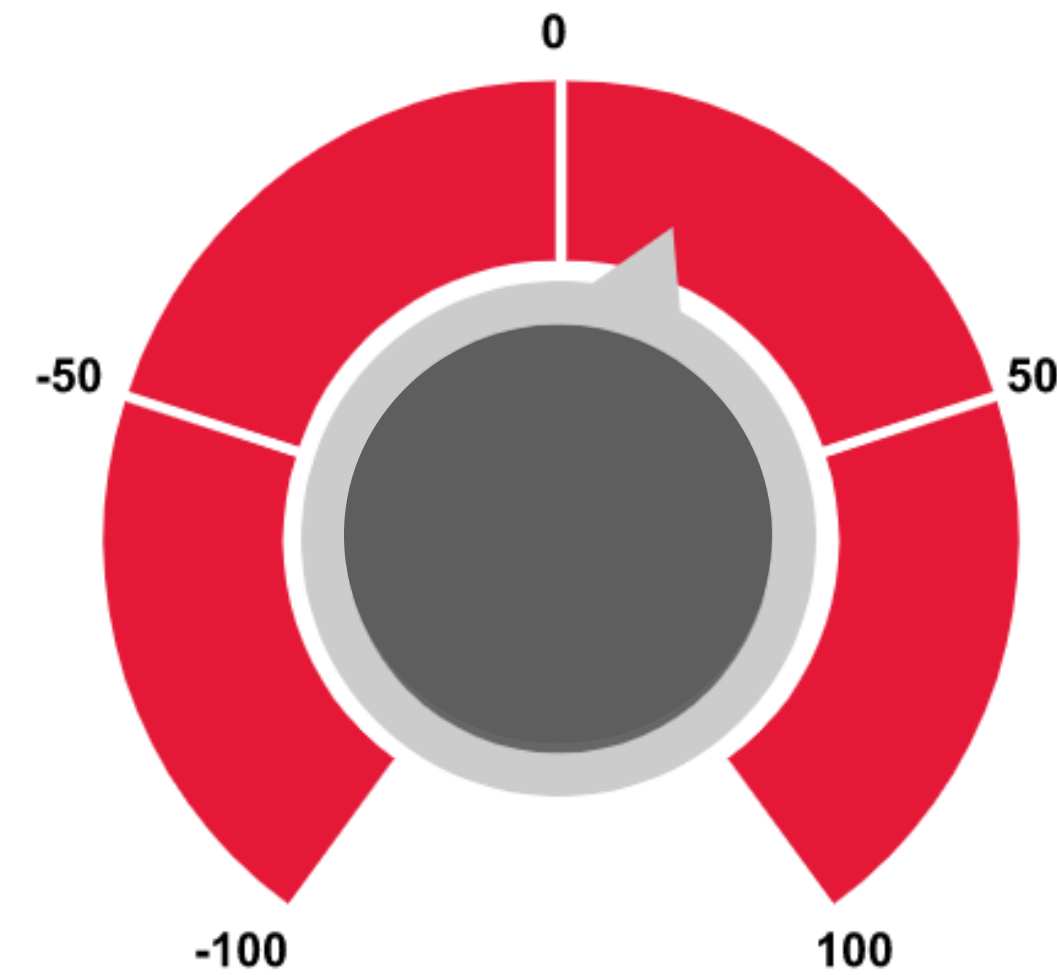


# Net Promoter Score

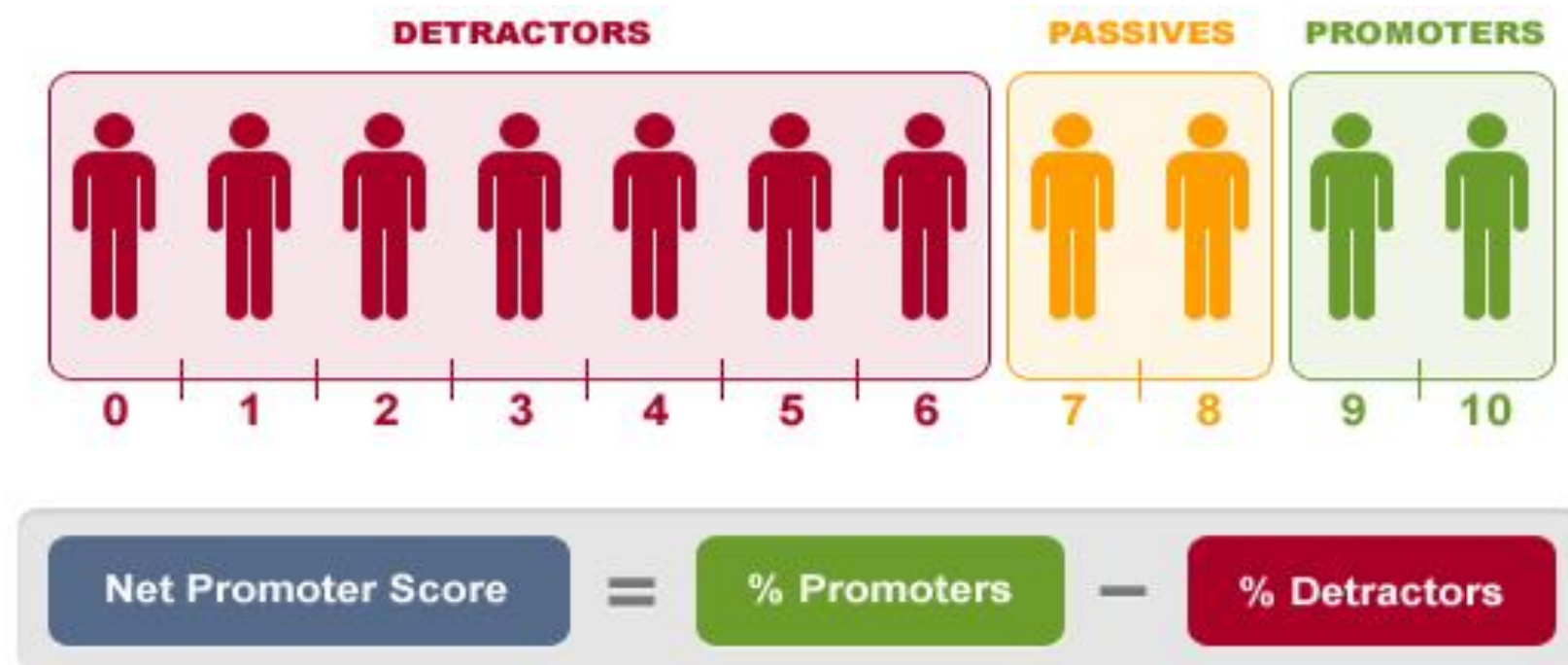
## Fixed Route

NPS poses the ultimate question:

*“How likely would you be to recommend riding TARC to a friend or neighbor?”*

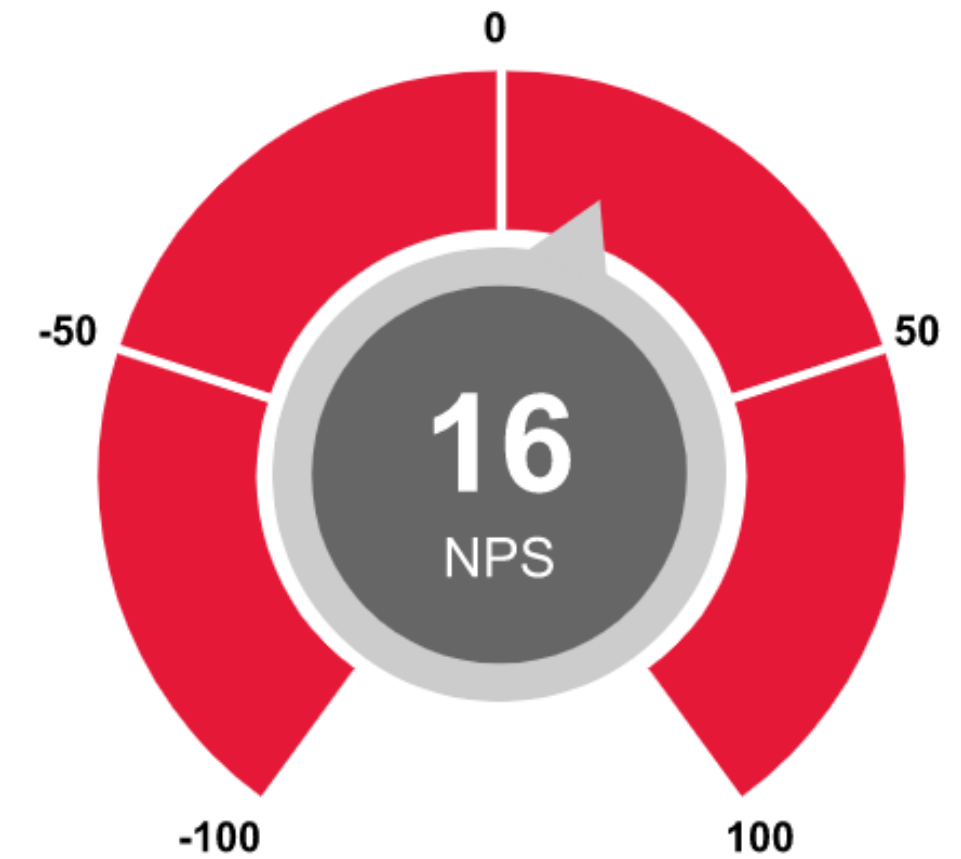


Organization	NPS
Apple	72
Chick-fil-a	64
Amazon	51
<b>Transit Agencies (Fixed Route)</b>	<b>37</b>
Cell Phone Providers	25
Airlines	12

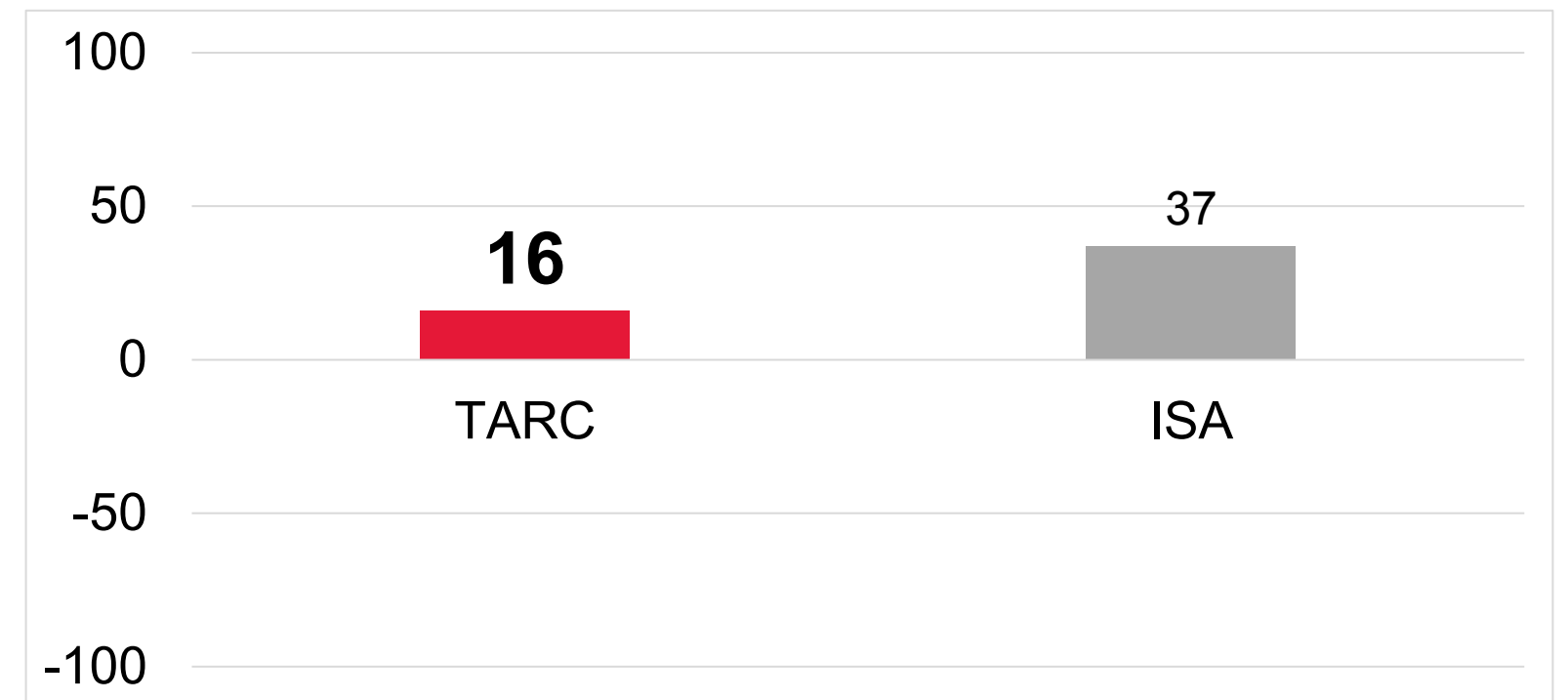
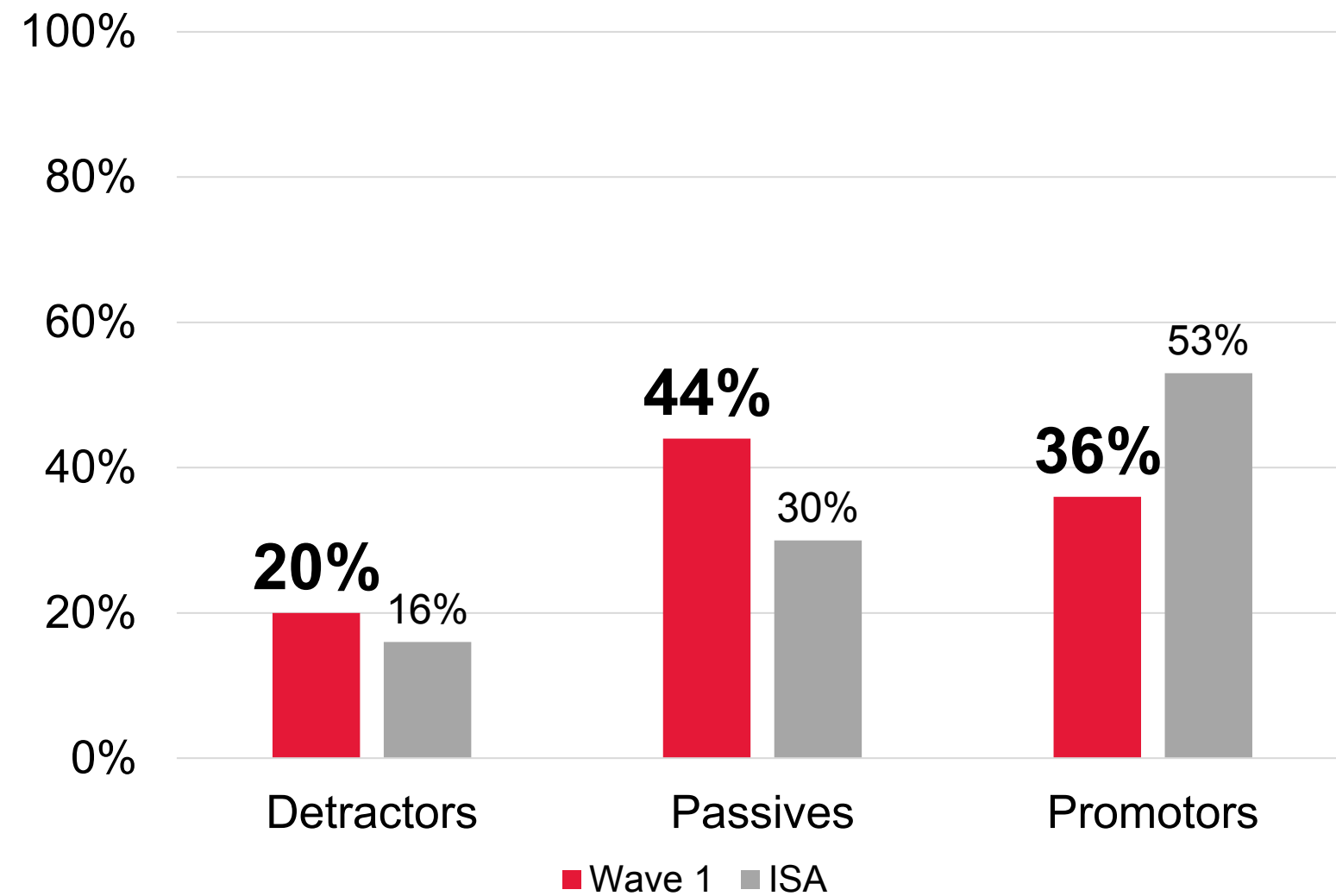


# Net Promoter Score

- TARC's Net Promoter Score is **16**, **21** points below the **ISA** (37).



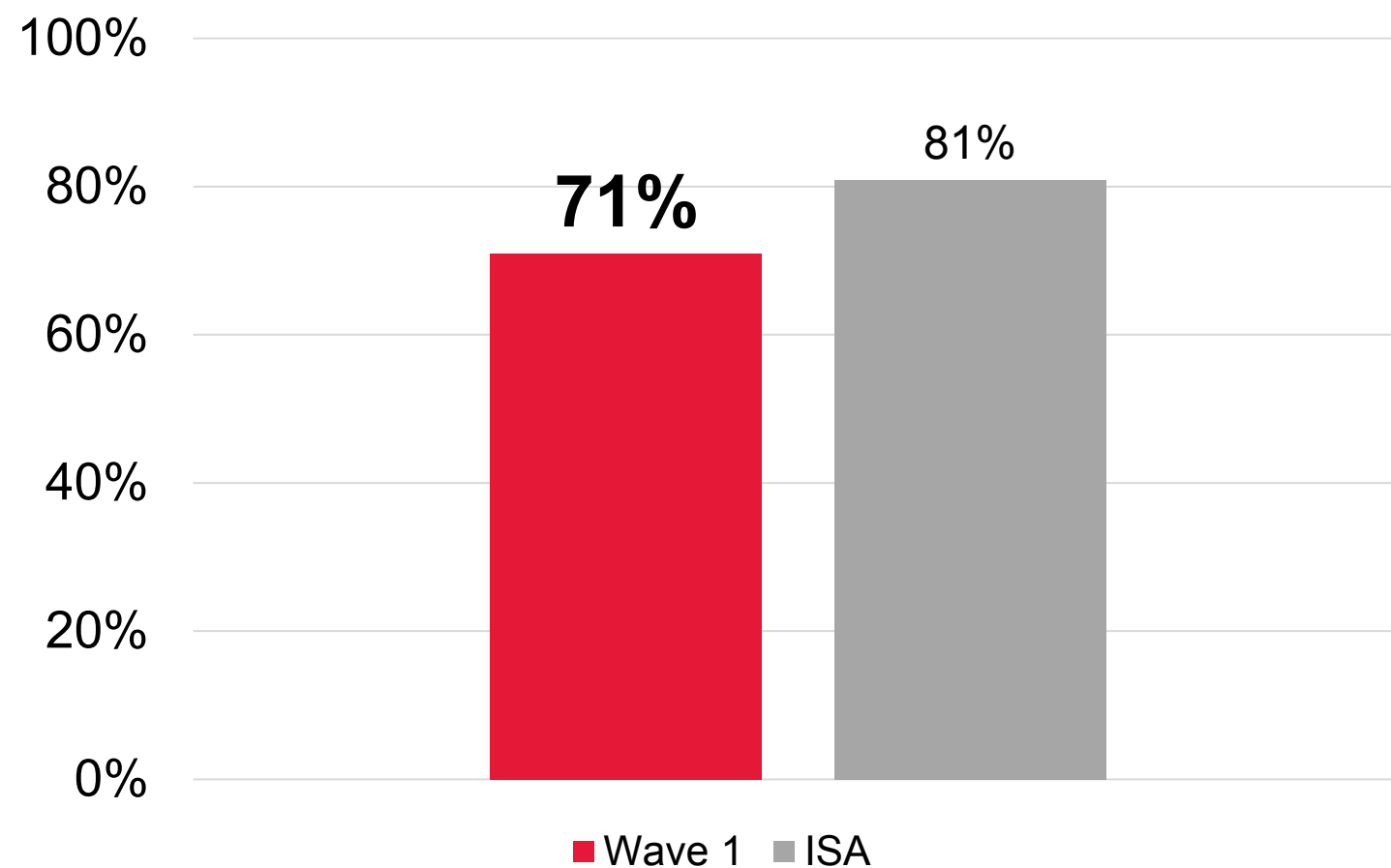
**NPS Factors**



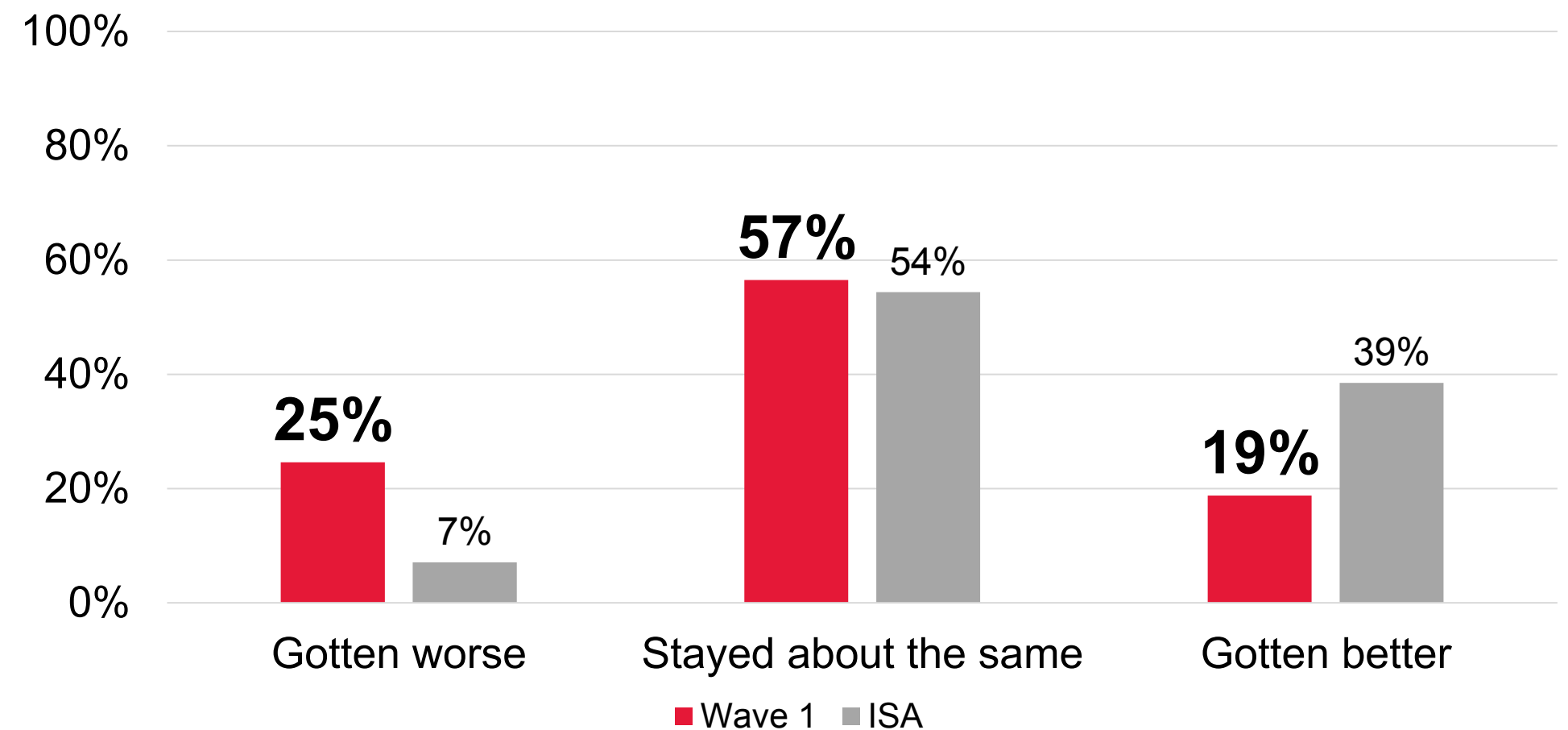
# Overall Customer Satisfaction

- **71% of TARC customers are satisfied with the bus service**, 9 percentage points below the ISA (81%).
- 25% of customers think the bus service has **gotten worse** in the past year, much higher than the ISA (7%)
- 19% of customers think the bus service has **gotten better** in the past year, 20 percentage points lower than the ISA (39%).

**Overall Satisfaction**



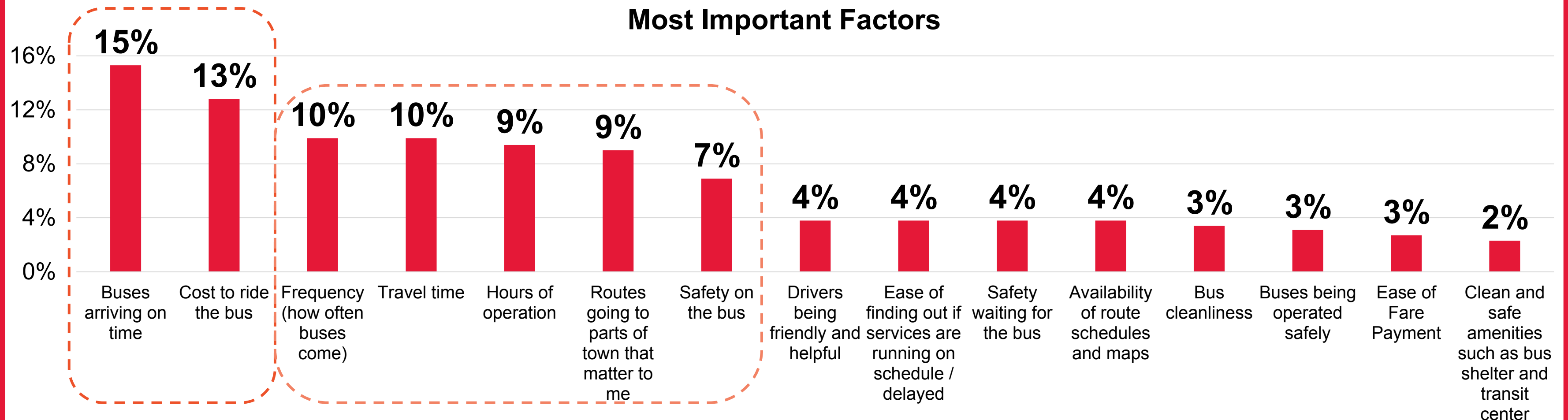
**In the past year, the bus service has:**





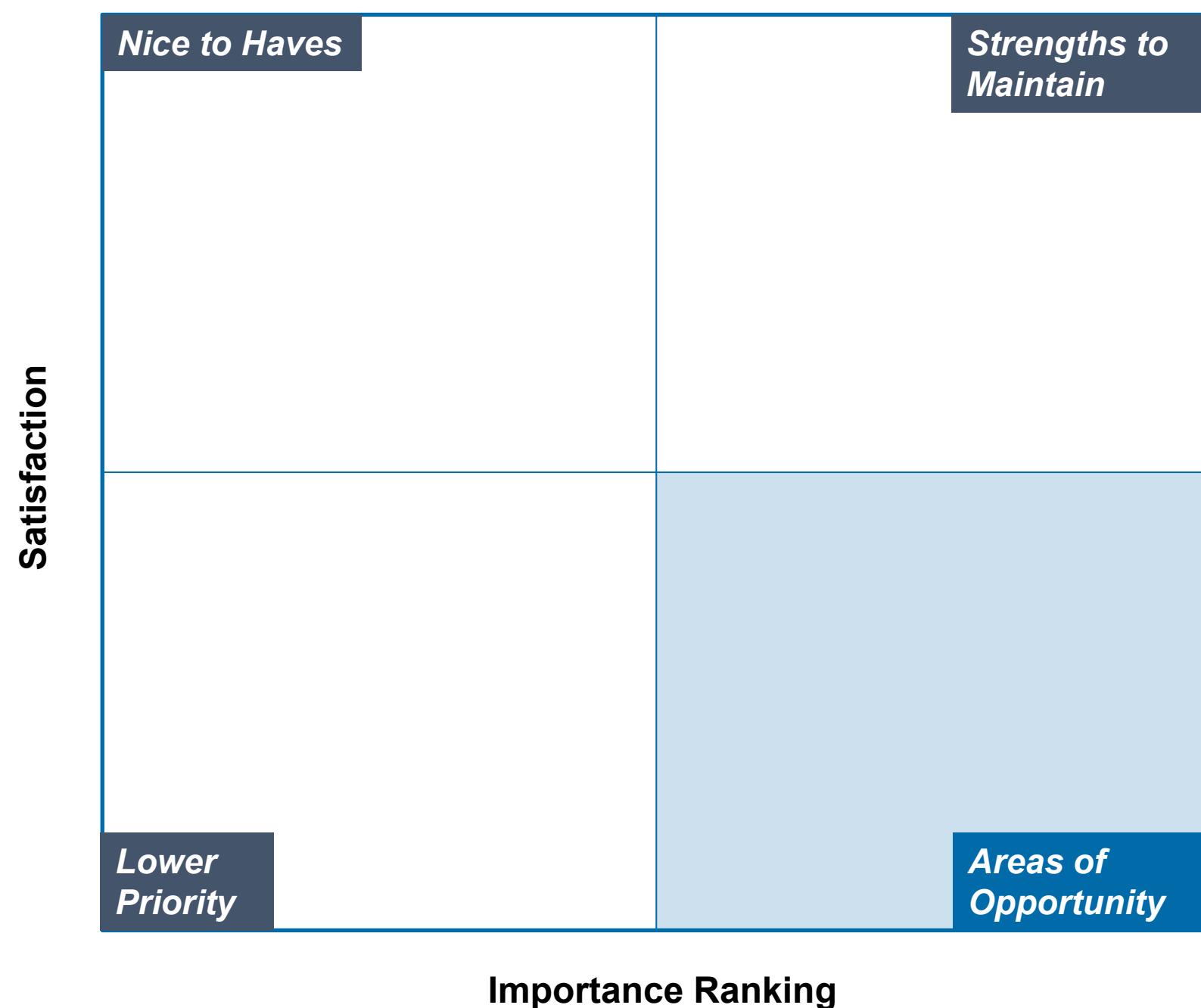
# Customer Importance Factors

- Customers were asked to rank their top 3 most important elements of service on TARC buses.
- Top Tier: **On-time performance** and **Fare Price** are the most important elements to customers.
- Second tier: **Bus Frequency**, **Travel time**, **Hours of Operation**, **Route Coverage**, and **Bus Safety**.



# Key Driver Analysis

Satisfaction VS Importance



The Key Driver Analysis takes each area of service and compares its customer importance ranking against its customer satisfaction level. The graph is divided into four actionable quadrants:

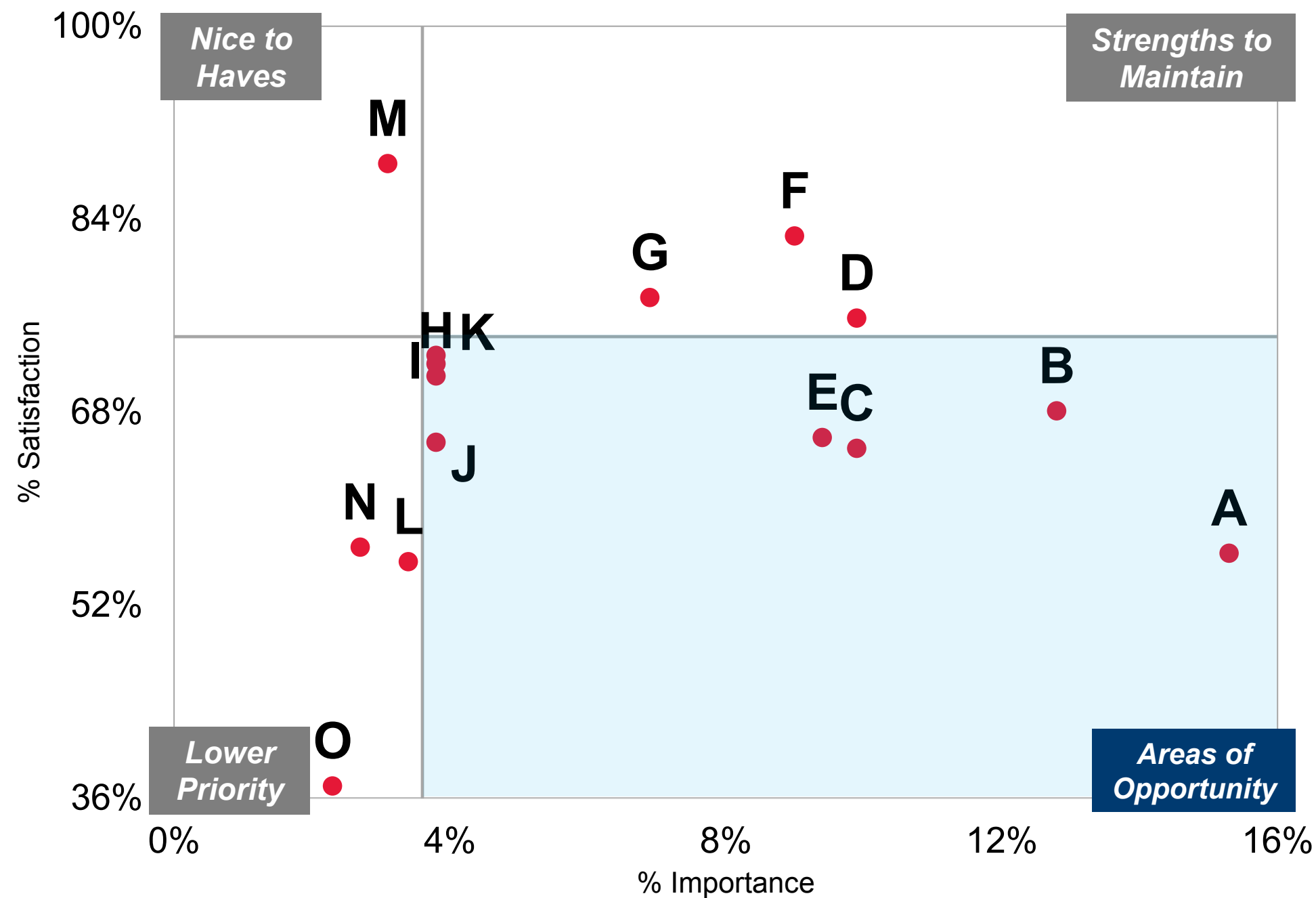
1. **Lower Priority** – This quadrant contains areas of service that have **lower importance rankings** and **lower satisfaction levels**. Although these have lower satisfaction levels, they are less important to customers and will have a smaller impact on overall customer satisfaction.
2. **Nice to Haves** – This quadrant contains areas of service that have **lower importance rankings** and **higher satisfaction levels**. Although customers are highly satisfied in these areas, these areas are less important to customers and will have a smaller impact on overall customer satisfaction.
3. **Areas of Opportunity** – This quadrant contains areas of service that have **higher importance rankings** and **lower satisfaction levels**. These areas are ranked as highly important to customers and will have a larger impact on overall customer satisfaction as the service is improved and satisfaction is raised.
4. **Strengths to Maintain** – This quadrant contains areas of service that have **higher importance rankings** and **higher satisfaction levels**. Customers find these areas of high importance and are highly satisfied with the level of service. These satisfaction levels should be maintained in order to continue a positive overall customer satisfaction.

# Key Driver Analysis

*TransPro Insight*  
OTP (A) is the standout issue in need of attention, both in terms of importance and satisfaction. Prioritize initiatives to improve OTP.



Satisfaction and Importance



## Legend

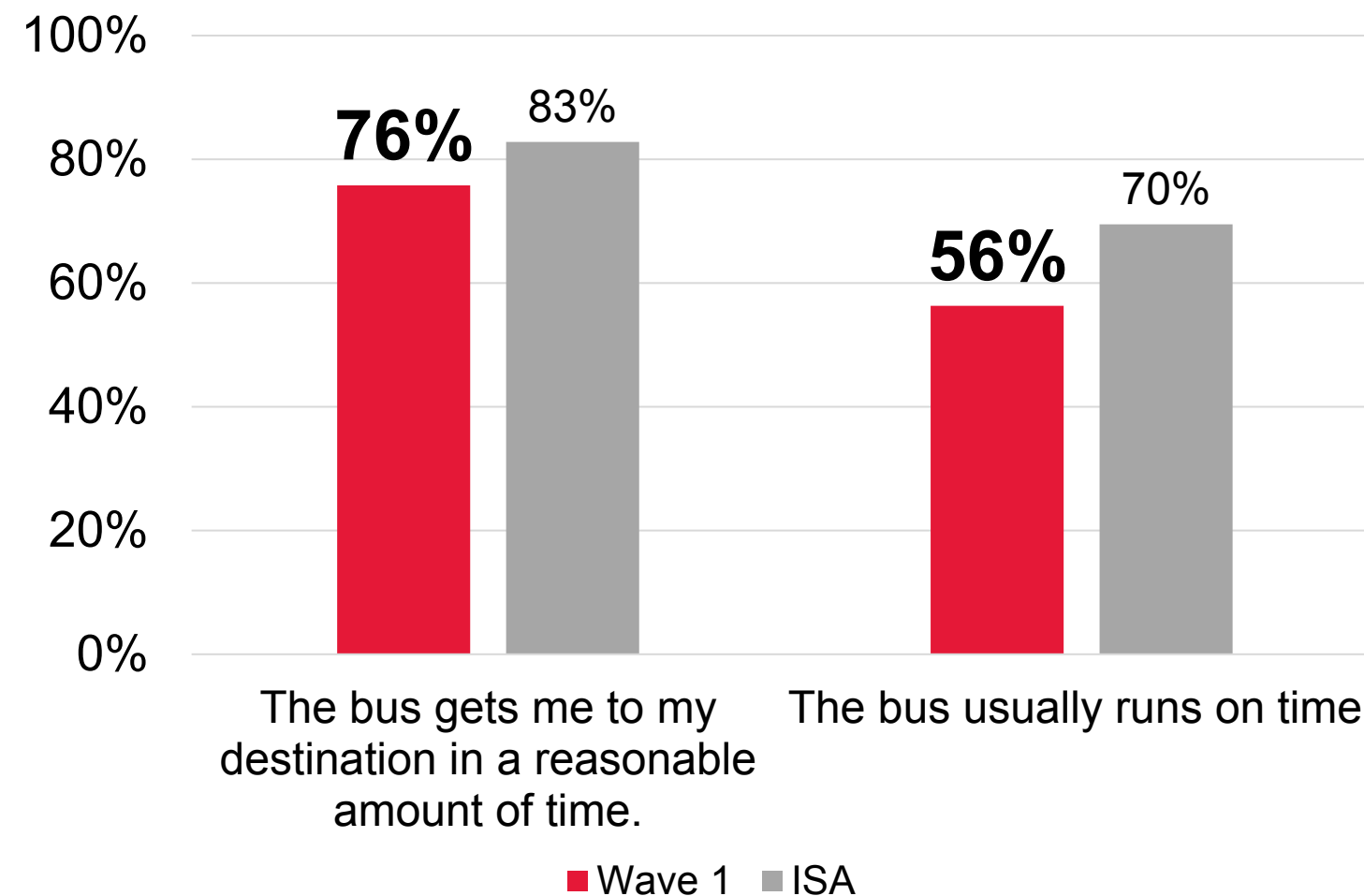
- A** – Buses arriving on time (OTP)
- B** – Fare price
- C** – Frequency (how often buses come)
- D** – Travel time
- E** – Hours of operation
- F** – Route coverage
- G** – Safety on the bus
- H** – Availability of route schedules and maps
- I** – Drivers being friendly and helpful
- J** – Ease of finding out if services are running on schedule
- K** – Safety waiting for the bus
- L** – Bus cleanliness
- M** – Buses being operated safely
- N** – Ease of fare payment
- O** – Clean and safe amenities



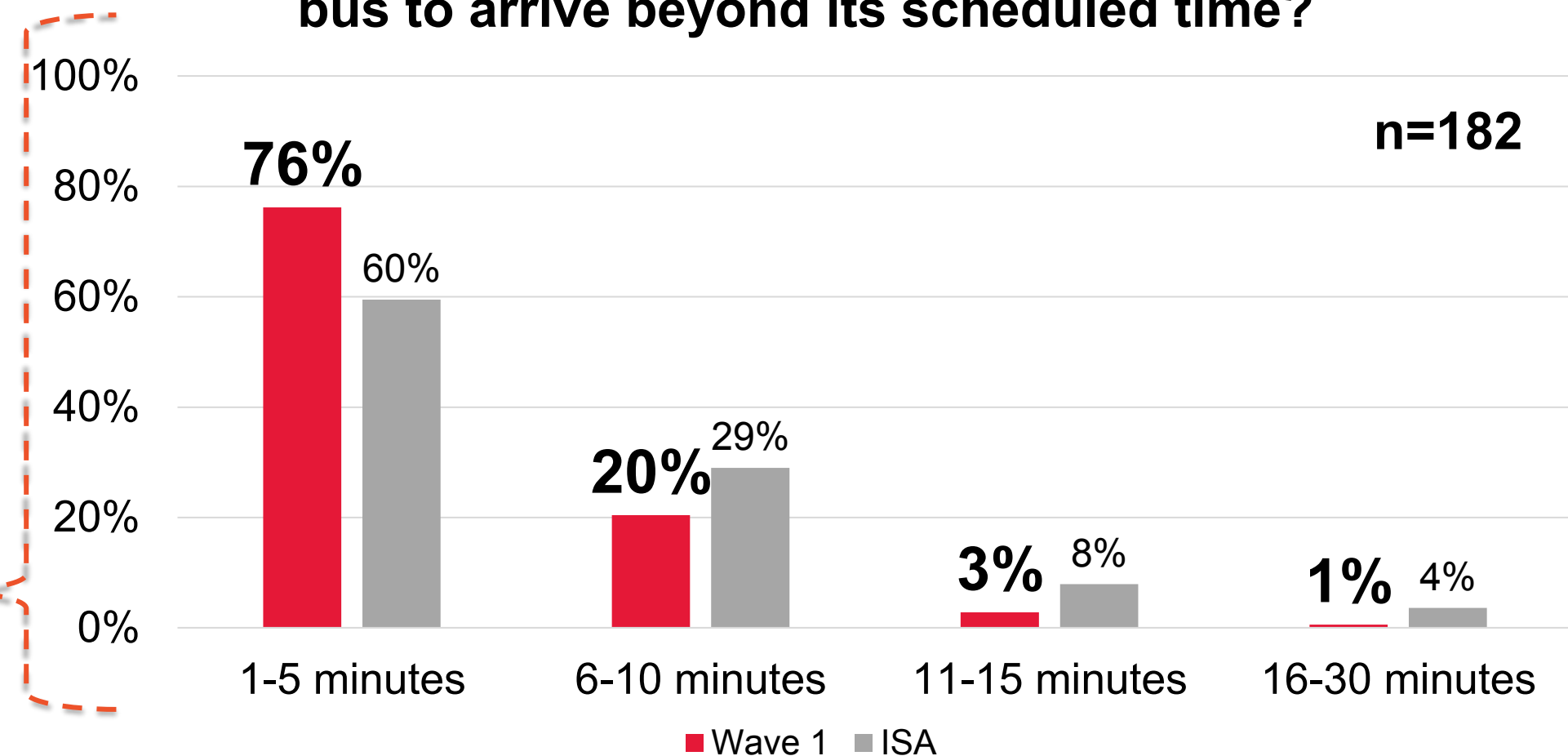
# Timeliness and Travel Time

- **76% of TARC customers are satisfied with the travel time, below the ISA (83%).**
- **56% of customers are satisfied with the on-time performance, 14 percentage points below the ISA (70%).**
- **Of the 44% not satisfied with OTP, 76% feel the bus should arrive within 5 minutes of its scheduled time.**

**Timeliness and Travel Time**



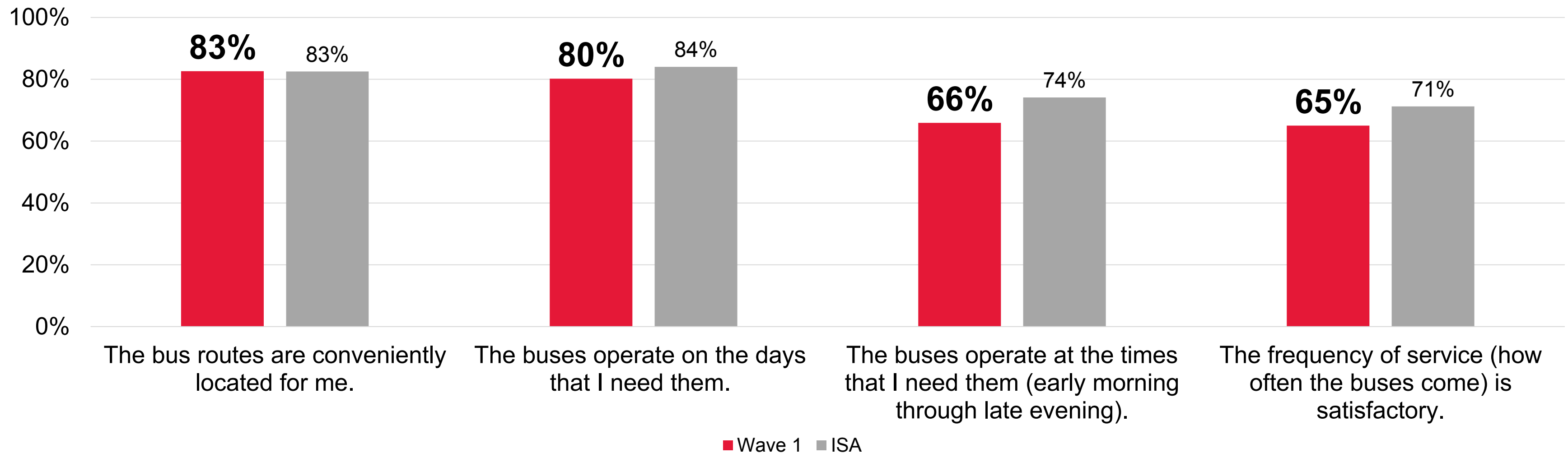
**How many minutes do you feel is acceptable for a bus to arrive beyond its scheduled time?**



# Availability and Access

- 80% or more of customers are **satisfied with bus route locations and operating days**, both close to the ISA.
- Customers are **less satisfied with operating times (66%) and the frequency of service (65%)**, both below the ISA.

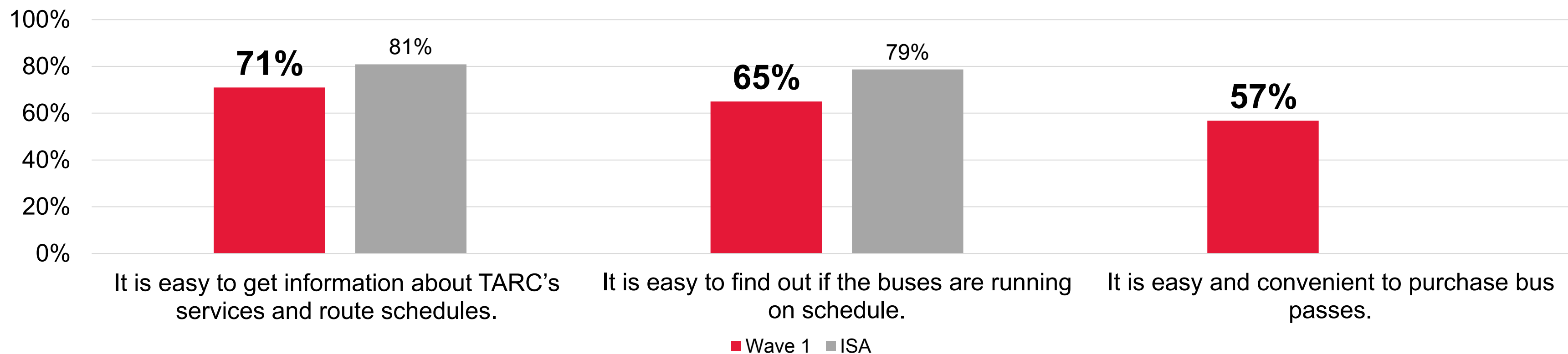
**Availability and Access**



# User-friendliness

- **71% of customers find it easy to get information** about services and route schedules, 10 percentage points below the ISA.
- **65% of customers believe it is easy to find out if buses are running on schedule**, 14 percentage points below the ISA.
- **57% of customers find it easy and convenient to purchase bus passes.** TransPro is waiting for one more agency to utilize this question before officially displaying the ISA, but it currently stands at 85%.

**User-friendliness**

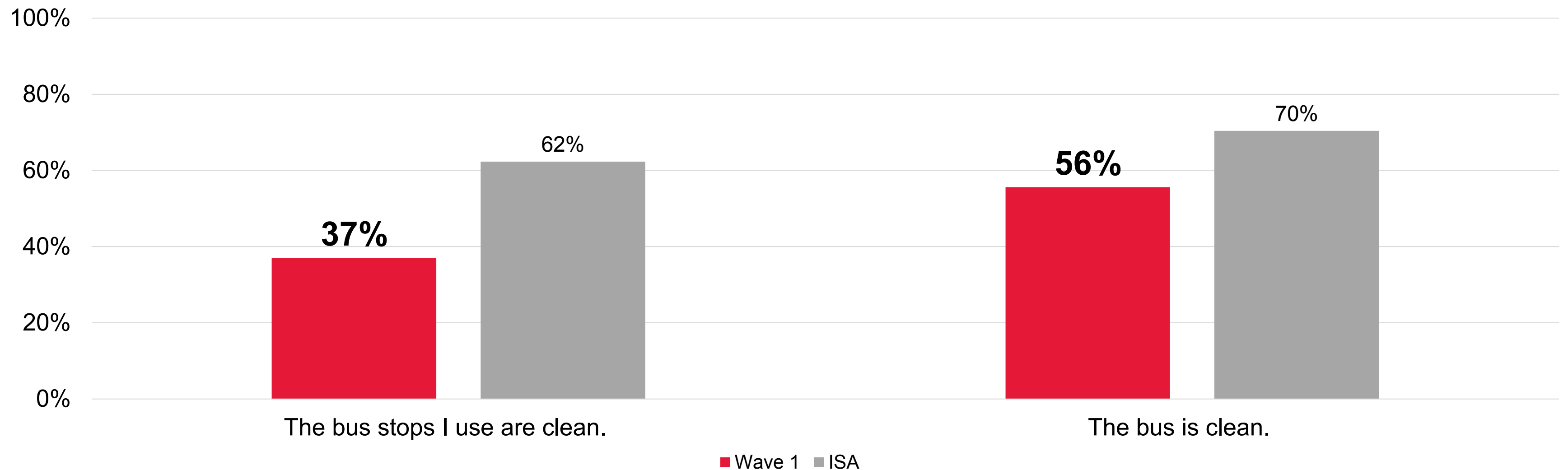




# Cleanliness

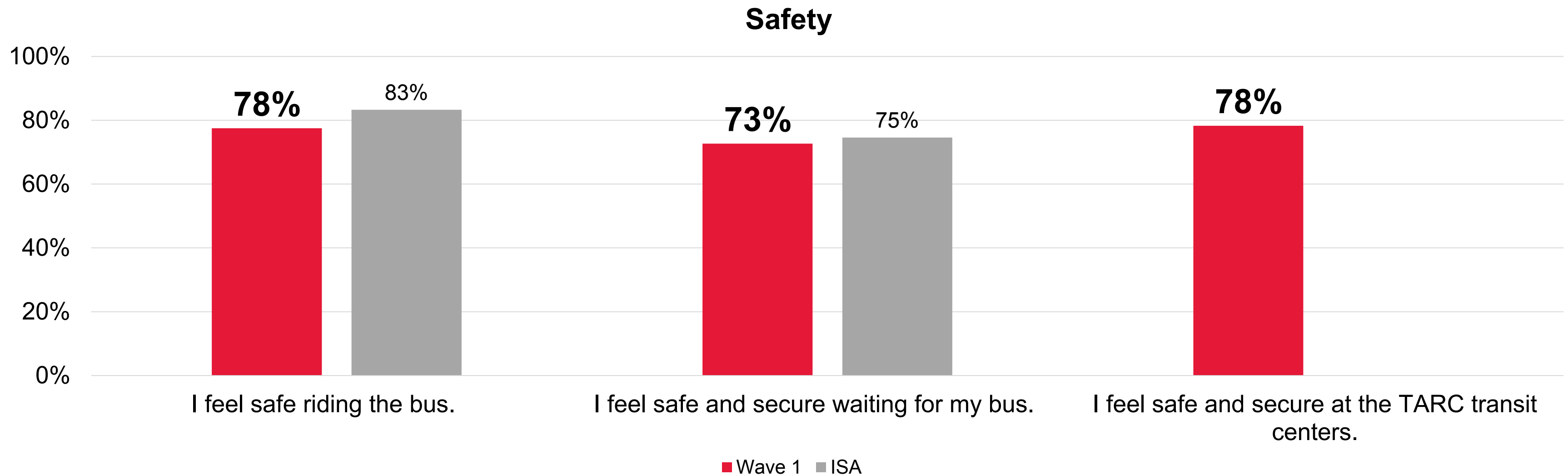
- 37% of customers feel the bus stop are clean, 25 percentage points below the ISA (62%).
- 56% of customers feel the buses are clean, 14 percentage points below the ISA (70%).

**Cleanliness**



# Safety

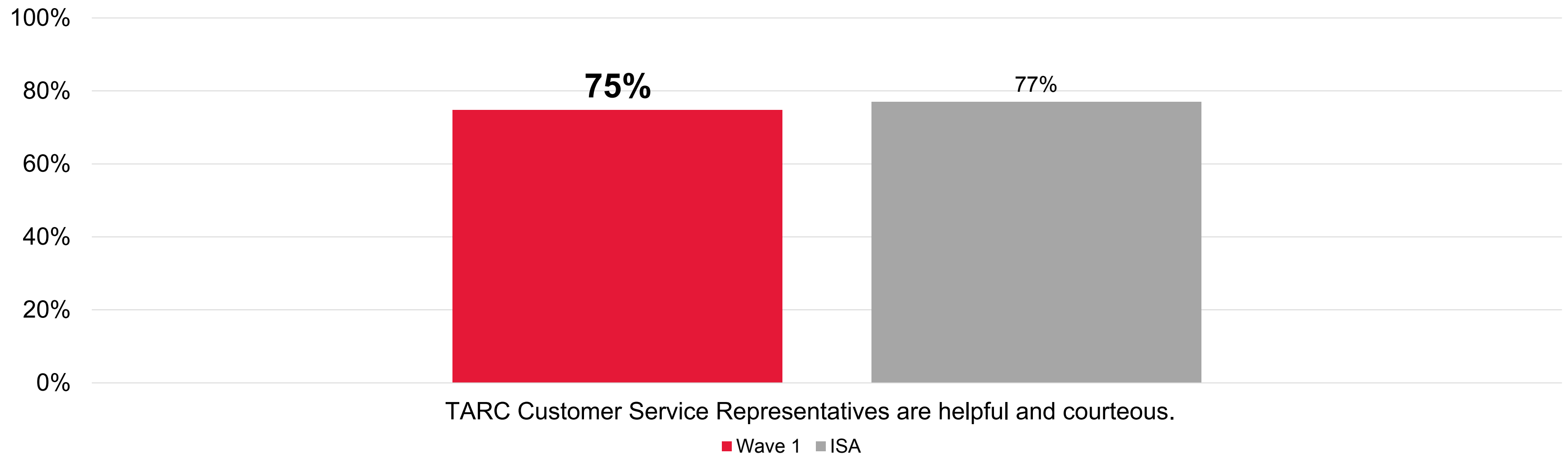
- Approximately 3 out of 4 customers feel safe and secure during their TARC experience. Safety while riding and waiting for the bus are both slightly below the ISA.
- There are not currently enough data points for the ISA regarding safety and security and transit centers, but one other agency saw 86% satisfaction in this area.



# Customer Service Part 1 – Courtesy

- 75% of customers who responded believe TARC customer service representatives are helpful and courteous.
- 128 of the 414 (31%) customers surveyed answered N/A to this question.

**Customer Service**

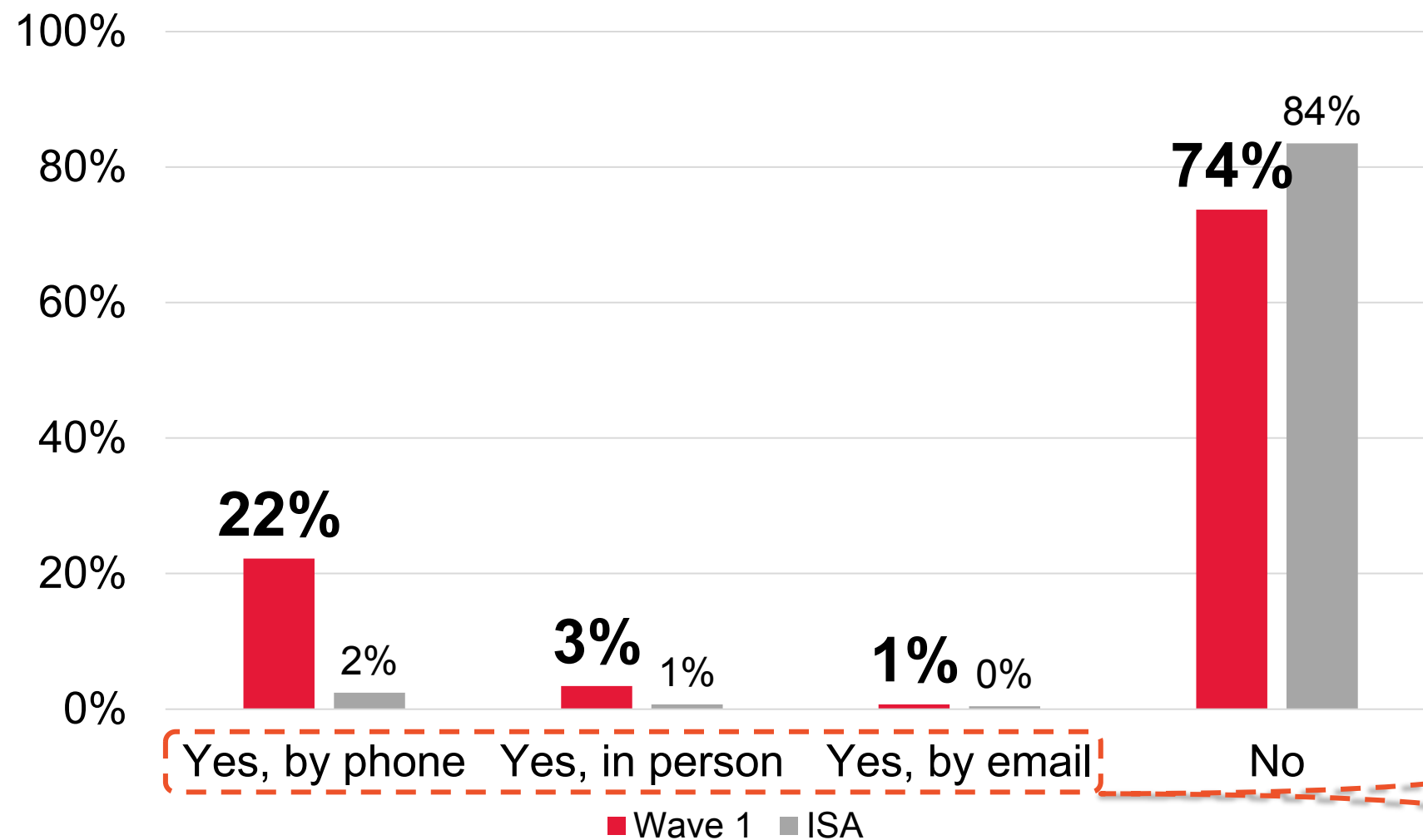




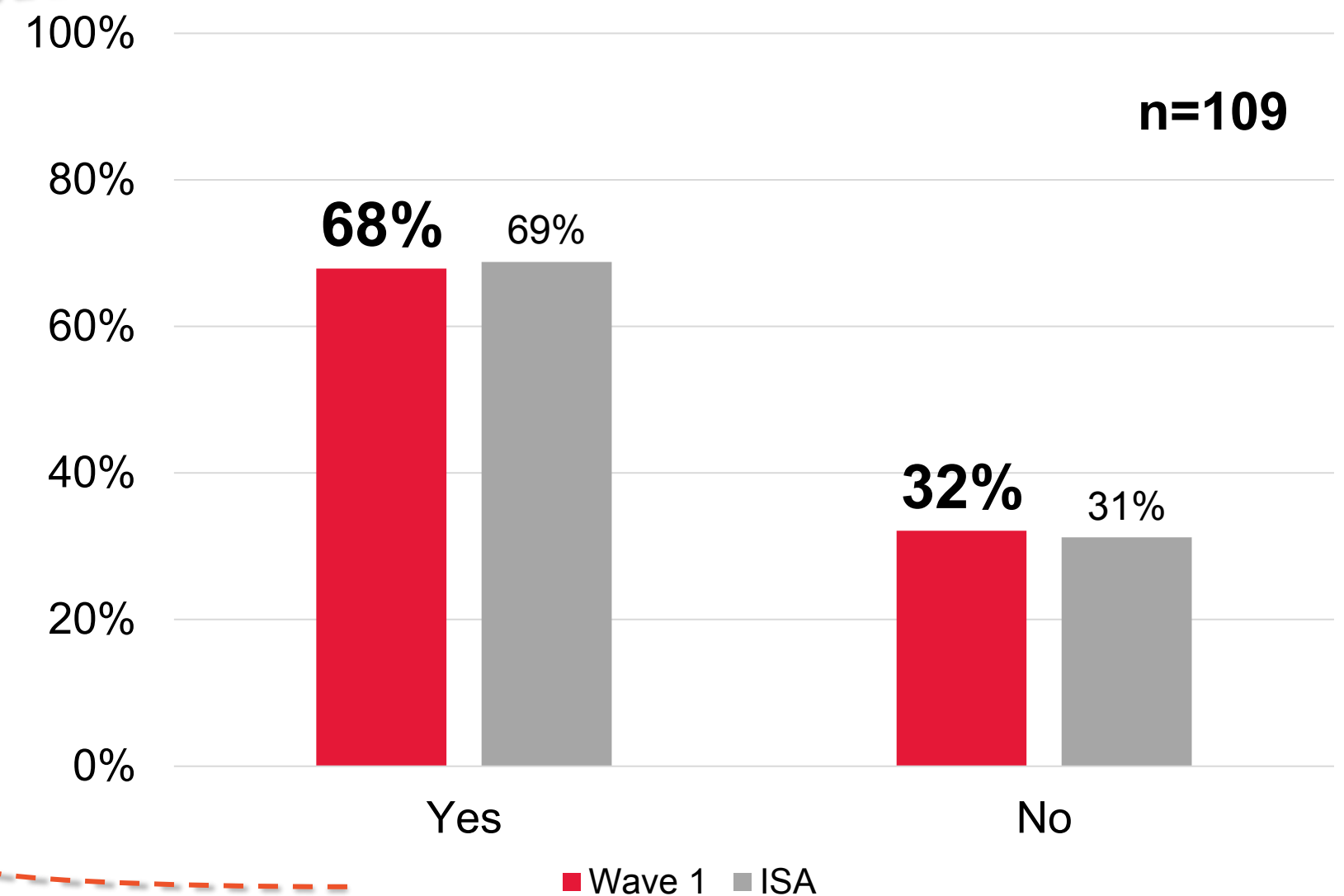
# Customer Service Part 2 – Contact

- 26% of customers (109 total) contacted customer service in the 3 months prior to the survey, 10 percentage points higher than the ISA.
- 35 of the 109 (32%) who contacted customer service feel their issue was unresolved, nearly even with the ISA.

**Have you contacted TARC customer service in the last 3 months?**

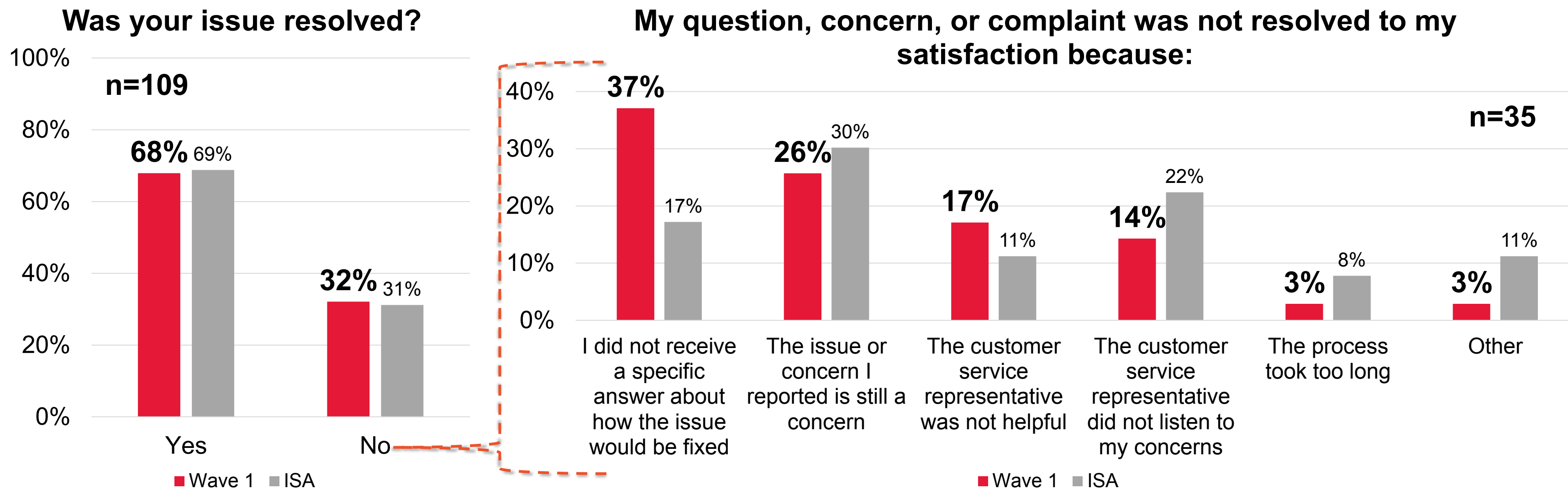


**Was your issue resolved?**



# Customer Service Part 3 – Resolution

- Almost 40% of customers with unresolved issues did not receive a specific answer about how the issue would be fixed. This is more than double the ISA.
- 17% felt that the representative was not helpful, above the ISA. Just 14% felt that the representative did not listen to their concern, better than the ISA.



# Fare Price

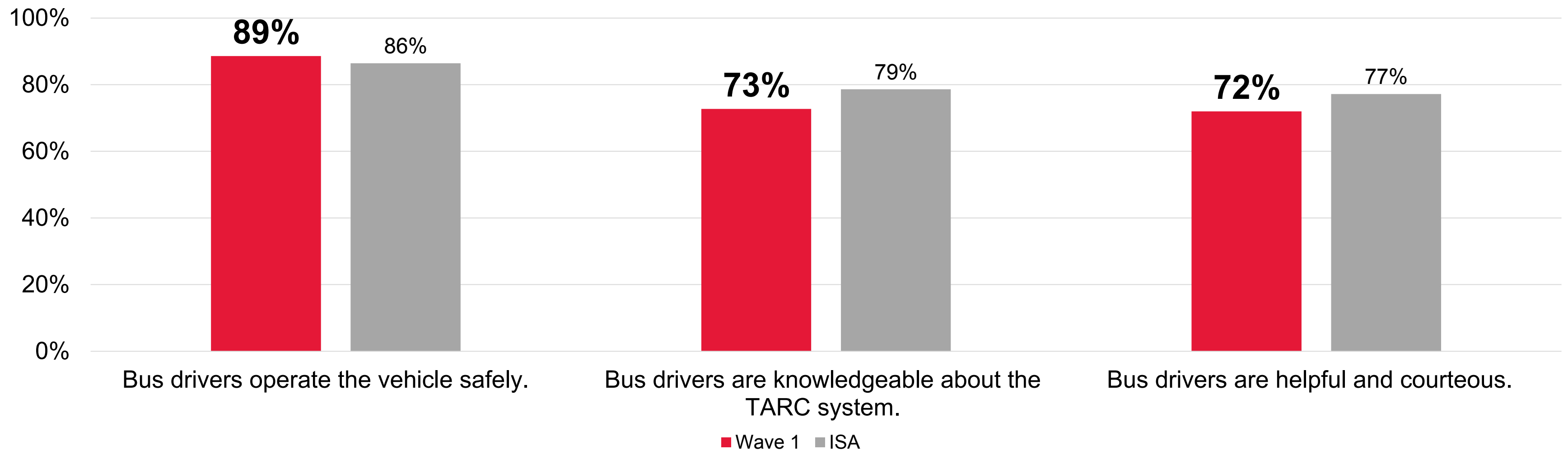
- 68% of customers believe the price to ride the bus is a good value, 14 percentage points below the ISA.



# Bus Drivers

- 89% of customers feel bus drivers operate vehicles safely, higher than the ISA.
- 73% of customers think bus drivers are knowledgeable about the TARC system, below the ISA, with 19% answering “Neutral.”
- 72% of customers feel bus drivers are helpful and courteous, below the ISA, with 18% answering “Neutral.”

**Bus Drivers**





# Community Value

- 79% of customers believe TARC provides value to the community, 10 percentage points below the ISA.

Community Value

