

2023 Customer Effort Score (CES) Survey

TRIMET SURVEY TEAM



Why measure customer effort?

- Customer Effort Score (CES) is a better predictor of loyalty than Customer Satisfaction (CSAT) (Harvard Business Review, 2010)
- It's widely used in other industries (typically as a complement to CSAT and Net Promoter Score)
- Allows us to:
 - Identify specific barriers and frictions our customers face
 - Quantify issues that were previously known only anecdotally, which helps with project prioritization
 - Track our year-over-year progress with an inexpensive survey
- These slides provide highlights of year 4 of TriMet's annual CES survey

How CES is calculated

How easy or difficult is it to plan transit trips?

- Very easy
- Somewhat easy
- Neither easy nor difficult
- Somewhat difficult
- Very difficult
- Don't know

$$\text{CES} = \frac{\text{(total easy - total difficult)}}{\text{(total responses - total don't know)}}$$

CES Survey content

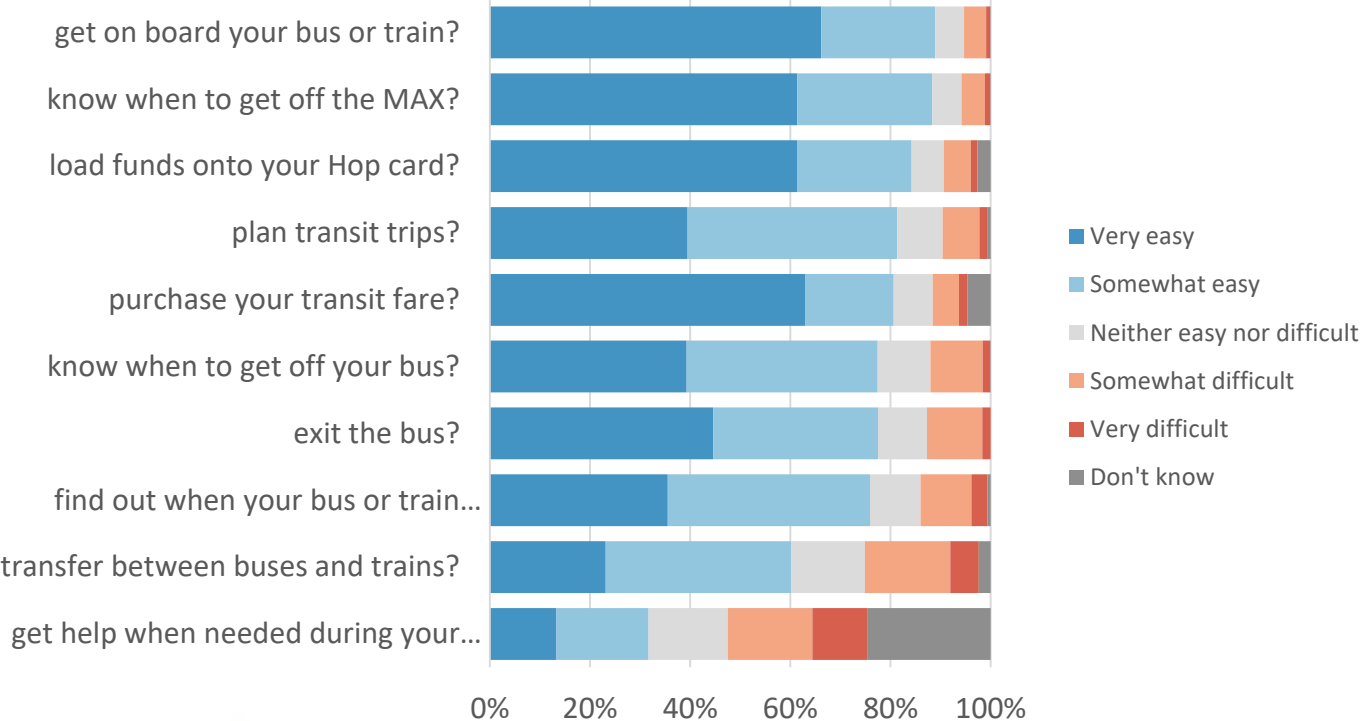
- **Screeners:** Used bus, MAX, and/or WES in the last 3 months
- Ease or difficulty of completing 10 tasks, such as
 - Purchasing transit fare
 - Exiting the bus
- Most important trip tasks to make easier (can select up to 3)
 - How could we make *[selected aspect]* easier? (open-end)
- Net Promoter Score
- Usual trip planner used
 - Detailed follow up questions for Spanish speakers
- Usual method for getting vehicle arrival times (Spanish only)
- Usual transit fare payment method
- Demographics

Survey distribution methods

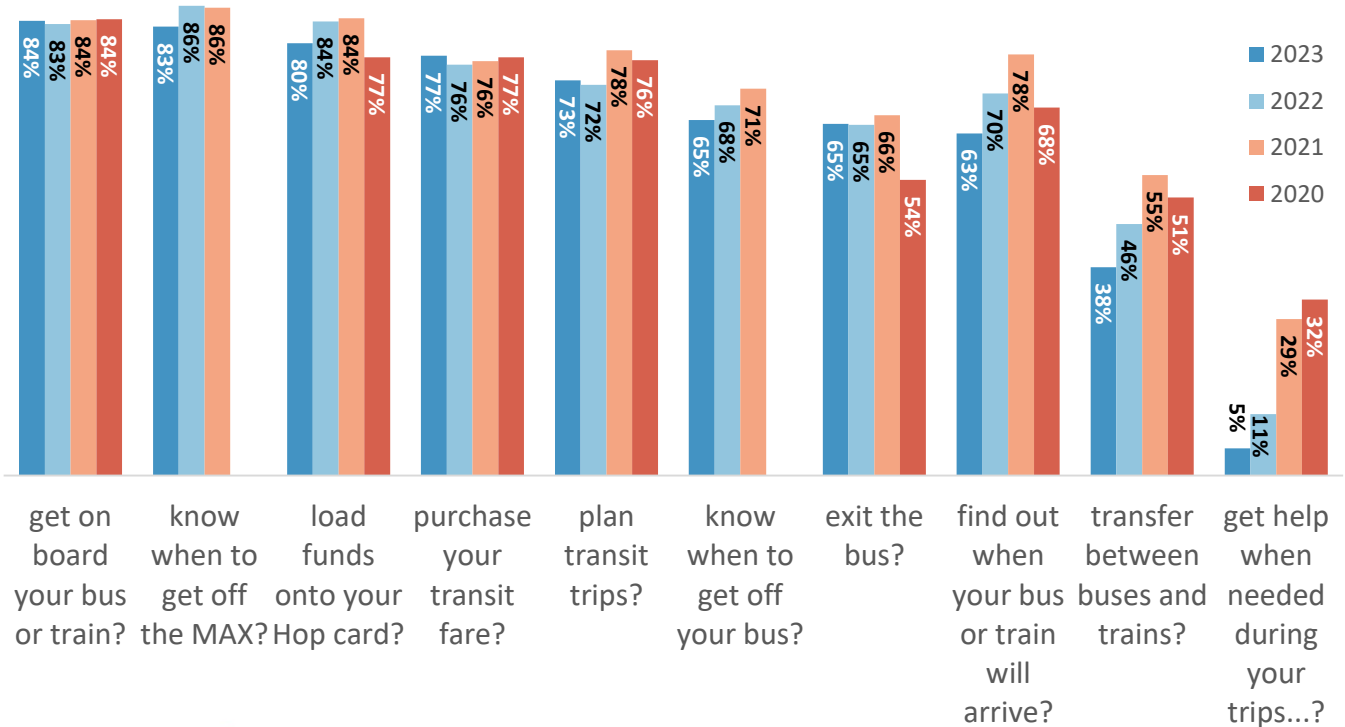
- Fielded May and June, 2023
- 2,428 total valid responses
 - Must have ridden within last 3 months
 - Answered Q1 and at least a couple of other questions
- Available in English (n=2421) and Spanish (n=7)
- 2 distribution channels:
 - Email to 65K Riders Club members
 - Email to 990 Equity on the Move members

Results

How easy or difficult is it to...(2023)

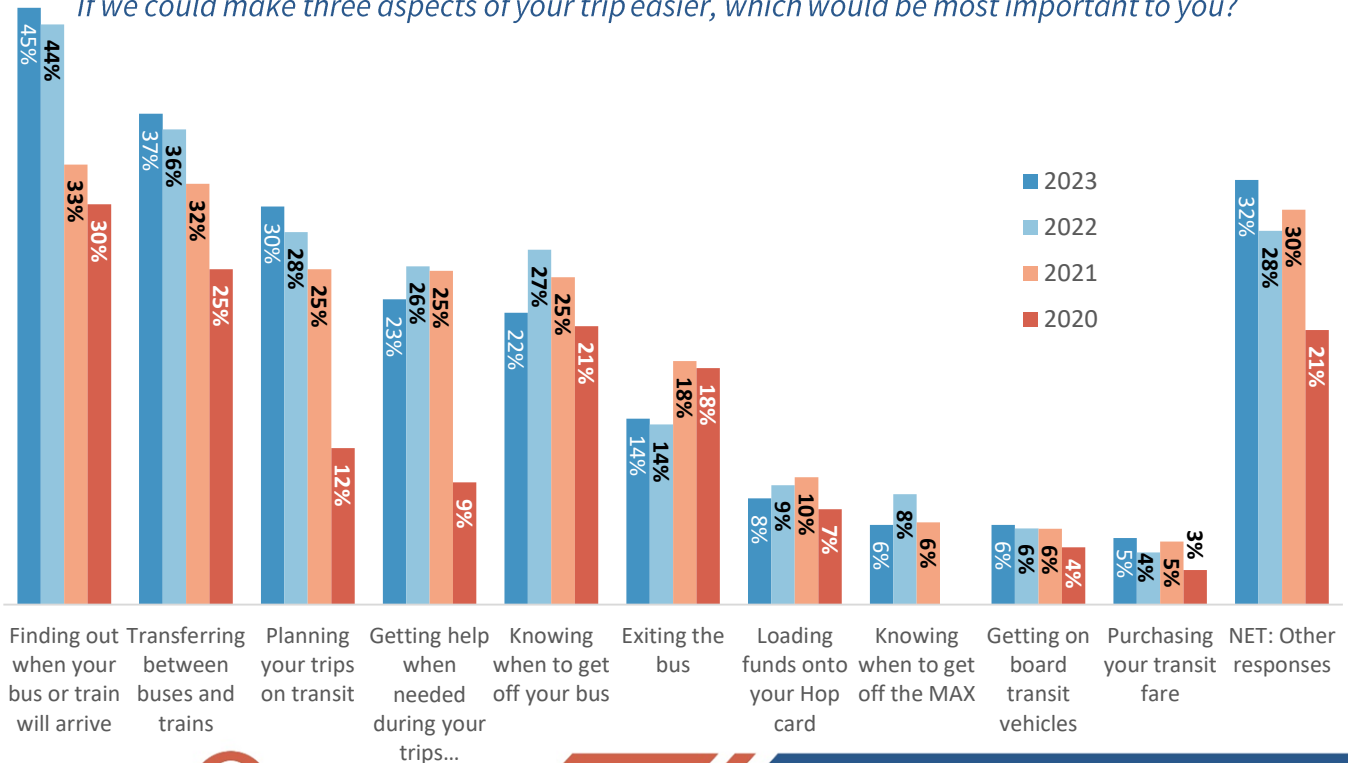


Customer Effort Score (CES)

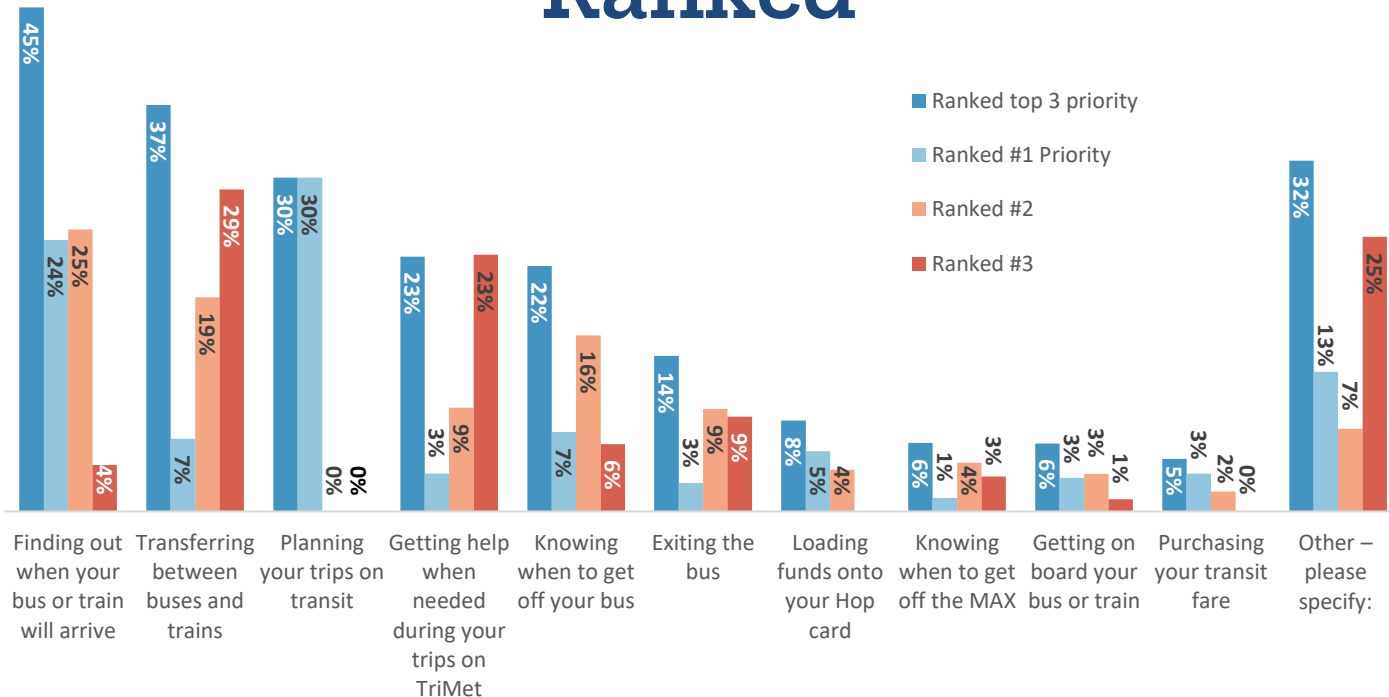


Most Important to Improve

If we could make three aspects of your trip easier, which would be most important to you?



Most Important to Improve: Ranked



Top 5 –Importance to Improve

| Category and Importance to Improve | | Top way to make it easier | |
|---|-----|--|-----|
| Find out when your bus or train will arrive | 45% | Add monitors to stops/monitor suggestions | 38% |
| Transfer between buses and trains | 37% | Vehicle or schedule timing/arrives early/late/service disruption | 41% |
| Plan your trips on transit | 30% | Trip planner- prefer old/improve features/options/choices | 49% |
| Get help when needed during trips on TriMet | 23% | Additional Staff* | 26% |
| Know when to get off your bus | 22% | On-board display/announcements for all stops** | 77% |

Bottom 5 –Importance to Improve

| Category and Importance to Improve | | Top way to make it easier | |
|------------------------------------|-----|---|-----|
| Exit the bus | 14% | Back door issues | 57% |
| Load funds onto your Hop card | 8% | Hop website/Hop app/Hop in general | 32% |
| Know when to get off the MAX | 6% | On-board display/announcements for all stops* | 78% |
| Get on board your bus or train | 6% | Kneeling/near curb/use ramp | 34% |
| Purchase your transit fare | 5% | TVM - not working/need more/load Hop there | 16% |

Customer Voices

The following 10 slides show open-ended responses to “*How could we make it easier to [X]?*”

- Only most frequently mentioned answer categories shown.
- Multiple categories could be applied to each response.
- Slides are ordered from 1st in importance to last in importance
- Each slide has a metrics summary box like this:

CES: 70%
Importance: 1 of 10

→ **Higher** is better

→ Range is from 1 to 10; **lower** means it needs to be improved

CES: 63%
Importance: 1 of 10

How could we make it easier to

find out when your bus or train will arrive?

38% Add monitors/monitor suggestions

- *"...more Screens at more bus stops."*

16% Issues with apps/website/need better apps

- *"Robust tracking integration with transit apps like Google Maps."*

16% Transit Tracker

- *"Trip planner is great, but the times are rarely accurate and don't match the times given by 238-ride which is almost always correct."*

14% Communicate vehicle timing/tracking

- *"Better updates for when a bus/train is going to arrive and if it isn't going to arrive an indication that it has been canceled would be nice rather than waiting until the designated time only to find the estimated time of arrival just disappears. ."*

How could we make it easier to

transfer between buses and trains?

41% Scheduling/On-time performance

- *“Scheduled better and more red lanes helps keep everything on time and transfers easier.”*

21% More signage/Maps/Transit Tracker info/Announcements

- *“better signage about what direction to walk to get to what bus/train going to what direction.”*

14% Increase Frequency – times and lines

- *“Make all routes so frequent that missing one transfer won't disrupt riders' entire commute.”*

9% Accurate real-time info/improve app info

- *“Improve live vehicle tracking in order to know arrival times to make connections..”*

How could we make it easier to

plan your trips on transit?

49% Trip planner- prefer old/improve features/options/choices

- *“Put the interactive map back up on your website, make sure every stop had a number clearly posted, include alternate time/route capacity in the planner”*

10% Need a TriMet app

- *“I suggest trimet create an app for google and apple phones..”*

8% Improve apps – Google Maps/Apple Maps/PDXBus, etc.

- *“More integration with map/direction apps.”*
- *“Provide correct real-time data to Apps, including delays.”*

How could we make it easier to

get help when needed during your trips on TriMet?

40% General Assistance

25% Additional Staff

- *“Attendants at each MAX stop or at least at major or busy stops. Example: I was at the airport and had a question and no one in sight. Imagine if I was an out of town visitor.”*

24% Training: driver/staff

- *“Have the bus drivers knowledgeable about their route...”*

28% Safety and Security

43% Security staff on vehicles/at stops

- *“Security on board, please.”*

How could we make it easier to

know when to get off your bus?

77% On-board display/announcements
for all stops

➤ This issue has been addressed. If those comments are removed...

22% Drivers help/make announcements

- *"Have the driver announce stops like they did in the old days."*

21% Route map on buses

- *"Perhaps route placards onboard like the MAX transit system does?"*

13% App that alerts me

- *"If we could get a "your stop is next alert, that would be helpful."*

How could we make it easier to
exit the bus?

57% Back door issues

- *“Get rid of the sensor-activated back doors that are difficult to get open. Also prohibit standing directly in front of the door.”*

24% Kneeling/near curb/use ramp

- *“It'd also be nice if the bus would snug up to the curb so I didn't have to take a deep step down to the street.”*
- *“If you are using a walker, especially if it's loaded with groceries, the driver should ask if you want the ramp. I've almost fallen trying to lift my full walker down.”*

14% Crowding/people in the way

- *“If buses came more frequently, there would be fewer people on each to block the isles.”*

5% Enforce seating for/assist senior and disabled riders

- *“Seats in the front of the bus are sometimes filled with wagons and carts of people who are not handicapped I am unable to exit the front door and the back door is a dangerous step for me”*

How could we make it easier to

load funds onto your Hop card?

32% Hop website/Hop app/Hop in general

- *“I have my virtual HopCard in my phone wallet. I should be able to open my wallet, choose the hop pass, and reload my card right there. I see no mechanism to do this.”*
- *“Hop add does not usually load on cellular data. This issue occurs on different devices with different service providers.”*

14% Retail store issues-loading/finding

- *“Make it available in more stores.”*
- *“A list of where to find locations to load cards.”*

13% Make it easier

- *“Make it easier by adding hop reload on the MAX ticket machines..”*
- *“I have a mental disability and this could be made easier. A number to call?”*

How could we make it easier to
**know when to get off
the MAX?**

78% On-board display/announcements
for all stops

- This issue has been addressed. If those comments are removed...

30% Map showing location

- *“Better route maps visible on the train. “*
- *“Digital maps on the bus that show where you are/what time stops are approaching/estimated time “*

21% Drivers help/make announcements

- *“Make sure there are spoken announcements and that they are correct. If they are incorrect make sure the driver is trained to give verbal announcements in a clear and concise manner.”*

Caution: small quantities

How could we make it easier to

get on board your bus or train?

CES: 84%
Importance: 9 of 10

34% Kneeling/near curb/use ramp

- *“If all your bus drivers lower bus for everyone and not decide who needs it lowered and who does not!!!”*

14% Vehicle

- *“Eliminate the Max cars that have steps to go into/out of the cars.”*

12% Crowding/people near door

- *“Clear the aisles as they are usually so overcrowded especially during the heavier times.”*

11% Safety and cleanliness

- *“Clean then more often & clear out those that are sleeping on several seats.”*

Caution: small quantities

CES: 77%
Importance: 10 of 10

How could we make it easier to

purchase your transit fare? (not using Hop card)

16% TVM - not working/need more/load Hop funds there

- *“Ticket machines more consistently in order; working consistently with payment options.”*

16% Hop card issues

- *“Put a loadable option to the Hop Card on the Max Kiosks..”*

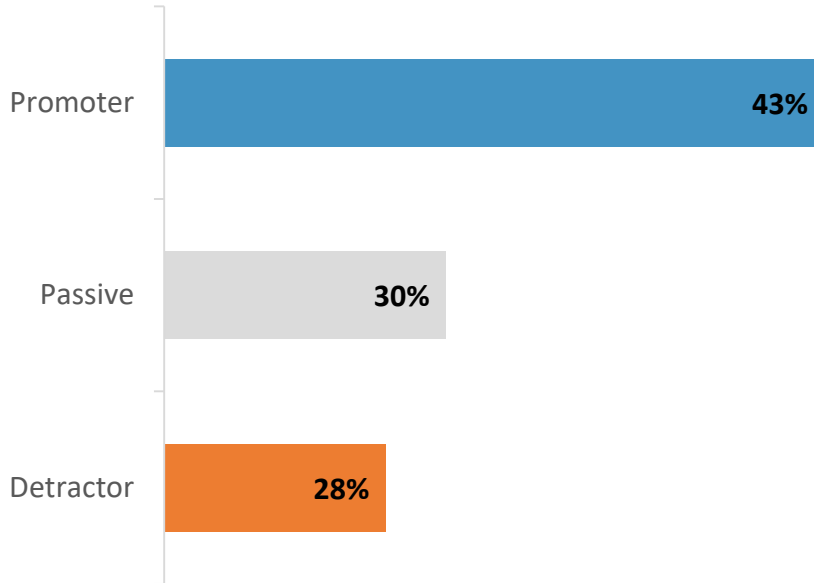
15% Want to pay by card/phone on transit vehicle

- *“Allow onboard purchases by tapping card. Sometimes I'm in a rush to make the train and waste time tapping on the platform device.”*

Caution: small quantities

Net Promoter Score (NPS)

How likely are you to recommend TriMet to a friend or family member?



NPS
15

Demographics and Ridership

GENDER

| Female | Male | Non-Binary |
|--------|------|------------|
| 51% | 44% | 4% |

AGE

| <18-34 | 35-54 | 55+ |
|--------|-------|-----|
| 21% | 36% | 43% |

ETHNICITY

| White Only | People of Color |
|------------|-----------------|
| 77% | 23% |

DISABLED

| No | Yes |
|-----|-----|
| 75% | 25% |

VEHICLES RIDDEN IN LAST 3 MONTHS

| Bus | MAX | WES |
|-----|-----|-----|
| 87% | 83% | 5% |

SURVEY LANGUAGE

| English | Spanish |
|---------|---------|
| 99.8% | .3% |

Takeaways

Top 2 areas of importance to improve (same for all years)

- Finding out when bus or train will arrive (significantly higher in 2022 than in 2020 and 2021, upward trend continuing for 2023)
- Transferring between buses and trains (difficult-second lowest CES every year)

Next in importance to improve were:

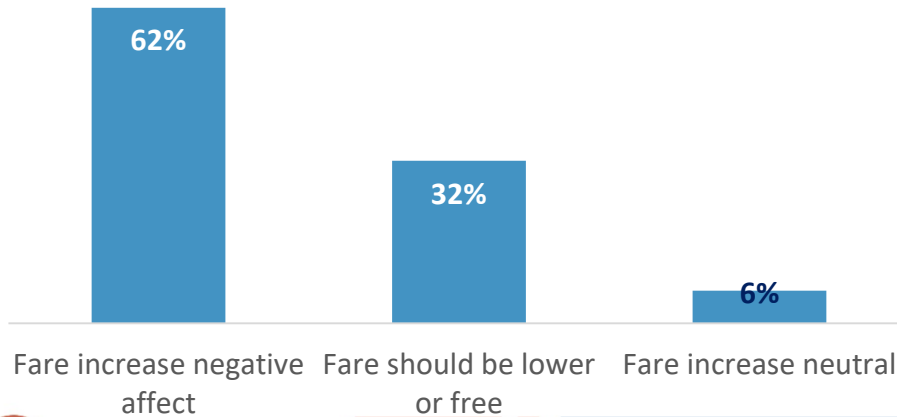
- Planning your trips on transit (relatively easy – CES 73%)
- Getting help when needed during trips (difficult-lowest CES and down additionally from significant drop in 2022)
- Knowing when to get off your bus (difficult-lower CES)
- Exiting the bus (difficult-lower CES)

The other 4 areas have pain points for some but are not as important to most respondents.

Takeaways – Fare Increase

Given the upcoming Fare Increase, it should not be surprising that many final comments addressed the issue.

- 17% of comments addressed the cost of transit



Considerations for next year

- Need to expand outreach to BIPOC, multilingual, and outer county communities.
- Do we push an ad campaign to support?
- Survey doesn't get at some aspects of customer experience, such as journey speed and cleanliness – should we address?

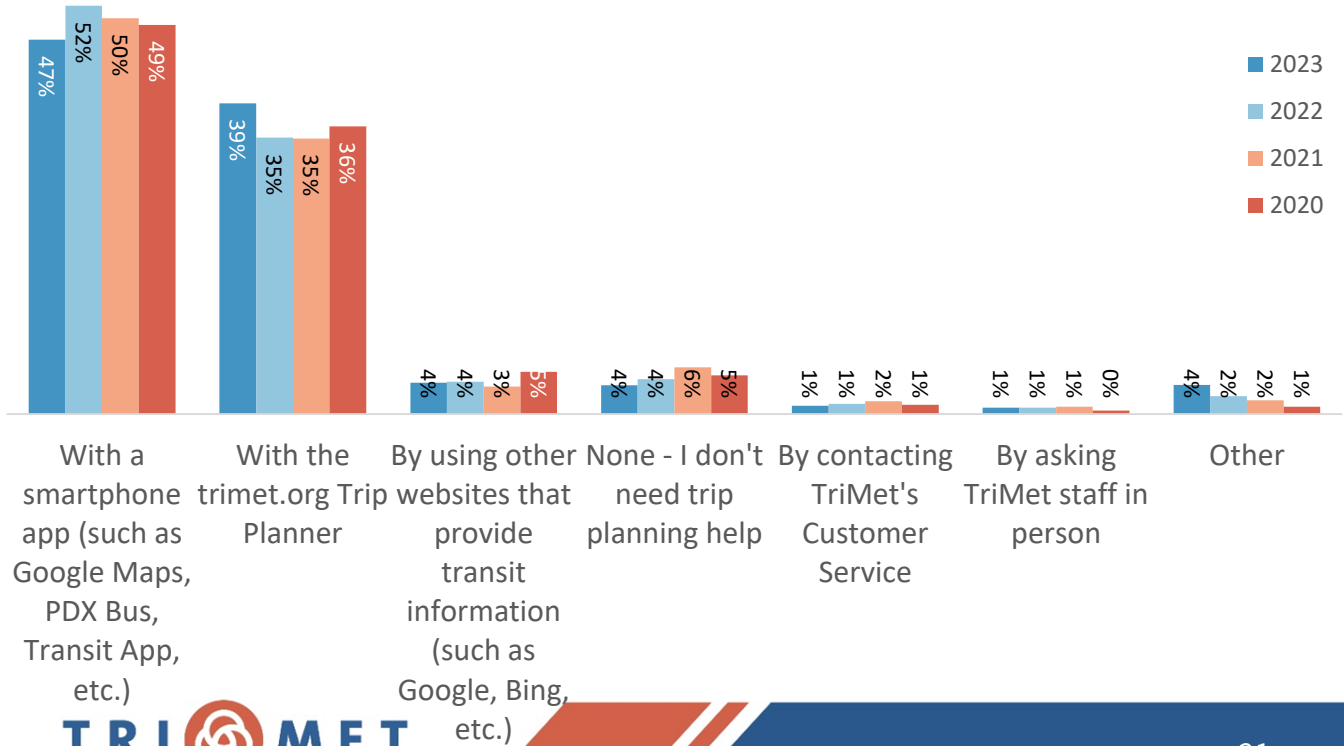
Questions?

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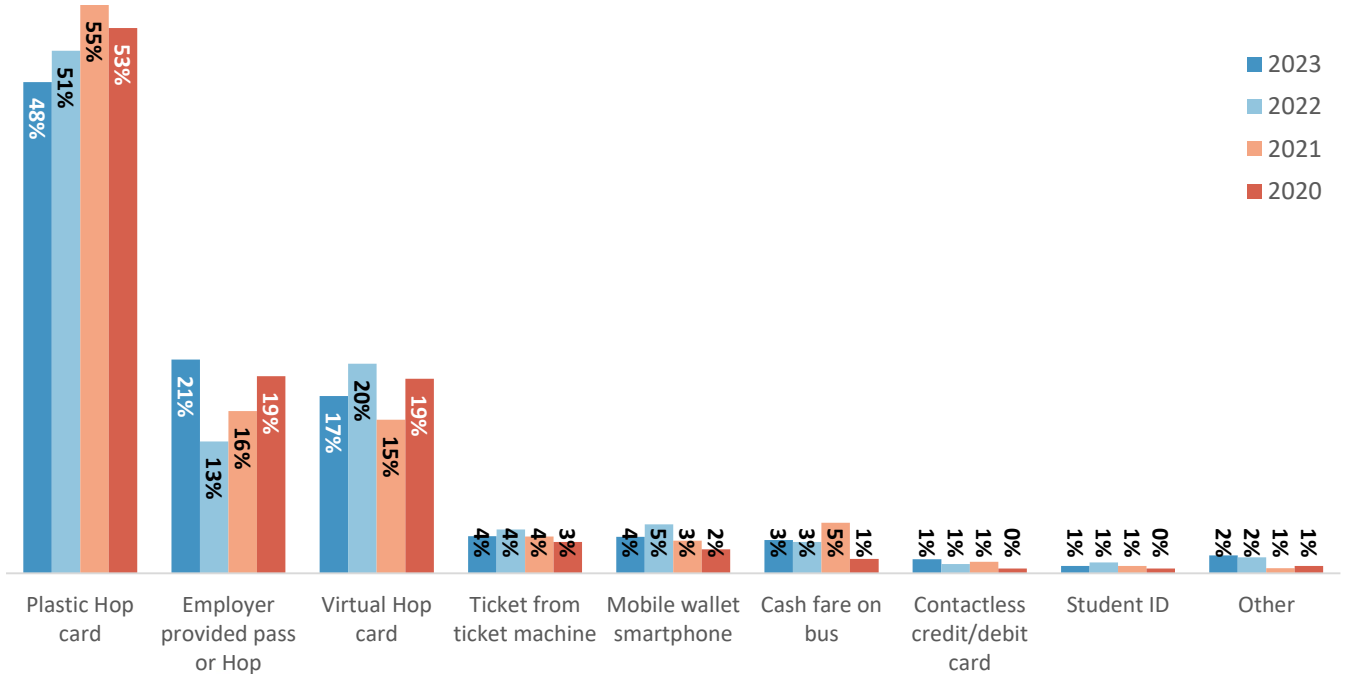
More detail available in questionnaire frequencies and verbatim responses.

Appendix slides

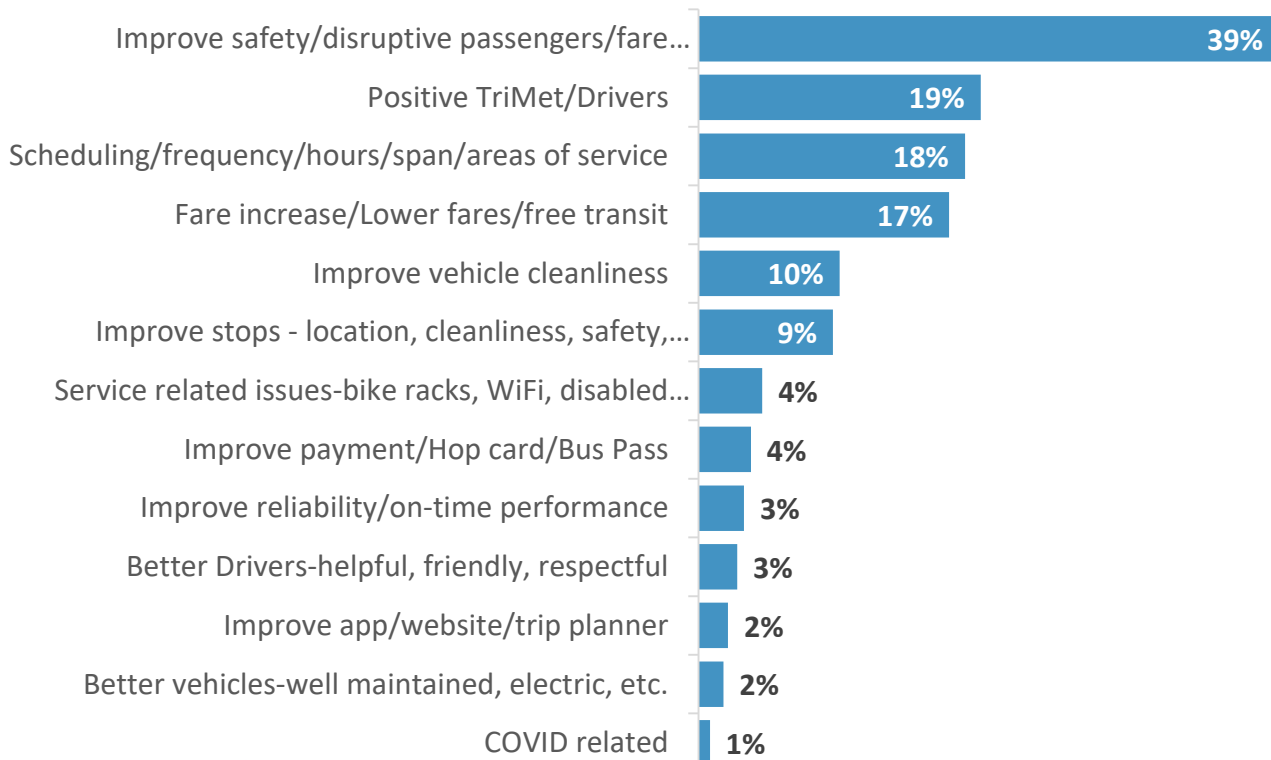
How do you usually get step-by-step transit directions? (Check one)



How do you usually pay for your transit fare? (Check one)



Is there anything else you'd like to tell us?



Question changes from 2020 to 2023

- Dropped two ease/difficulty questions because people found them easy in 2020, and we didn't think additional results would be helpful:
 - How easy or difficult is it to find the Hop card reader?
 - How easy or difficult is it to locate and access the correct station or bus stop?
- Split “How easy or difficult is it to know when to get off your bus or train?” into separate questions for bus and MAX.
- Instead of asking people to pick the 3 hardest tasks, and then the 3 easiest tasks, we asked them which tasks would be most important to make easier. We did this to shorten the survey, and because we were interpreting most difficult as importance, so wanted to ask for that more directly.
- Added two COVID-19 questions in 2021, removed in 2022
- Added a Net Promoter Score question in 2021
- Added follow up questions for Spanish language respondents to learn more about how they plan trips and access arrival information.
- Removed income and family size questions, as this information is personal and not strictly necessary in this case.
- Added disability question in 2022.