RTC Fixed Route Customer Satisfaction Wave 12 Results



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TODAY'S DISCUSSION



- Methodology
- Customer Satisfaction Results
- NPS Net Promoter Score
- #1 Customer Importance Factors
- Customer Impressions
- Customer Characteristics
- Takeaways
- Q & A

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Methodology

- This report contains the results of Wave 12 of the RTC Customer Satisfaction Survey, which was conducted April 29 – May 6, 2019. The results are compared with the results from Waves 9, 10, and 11, conducted in October, 2017, April, 2018, and November, 2018 respectively.
- 850 surveys were completed by customers on board RTC fixed route buses. 535 resident surveys and 315 tourist surveys were completed.
- Surveys were administered during service periods throughout the day on weekdays, Saturday, and Sunday.
- Based on RTC's ridership totals, this survey sample is statistically valid at the 95% confidence level, with a confidence interval of 3.36%.
- Customers were offered a free 24-hour bus pass as an incentive for completing the survey.



Agency Customer Satisfaction

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Agency Results Overview

RTC's agency Net Promoter Score (NPS) for fixed route buses is 39%, 22% above an industry sample.

On-time performance is by far the most important element of service to agency bus customers.

Customer impressions of most driver, safety, and security metrics increased or remained stable in Wave 12.

Customers are most satisfied with RTC taking them where they need to go (84%), drivers' familiarity with the routes (84%), and safe operation of the buses (84%).

Customers are least satisfied with call wait times (37%), bus stop and shelter cleanliness (44%), safety and security while standing at bus stops or shelters (49%), and on-time performance (53%).

Route	Surveys
101	15
102	7
103	15
104	10
105	13
106	14
108	10
109	33
110	21
111	10
113	20
115	21
117	8
119	6
120	6
121	5
122	6
201	29
202	41
203	25
206	38
207	9
208	9
209	3
210	18
212	10
214	3
215	11
217	8
218	8
219	7
301-Deuce	210
502-SDX	107
503-BHX	41
504-SX	36
901-CX	4
902-WAX	5
903-HDX	3
904-DVX	5

Lot A	Surveys
101	15
102	7
105	13
106	14
110	21
111	10
113	20
115	21
120	6
121	5
203	25
206	38
207	9
208	9
209	3
210	18
214	3
215	11
218	8
219	7
901 - CX	4
902 - WAX	5
904 - DVX	5

Lot B Local	Surveys
103	15
104	10
108	10
109	33
117	8
119	6
122	6
201	29
202	41
212	10
217	8
503 - BHX	41
504 - SX	36
903 - HDX	3

Lot B Resort	Surveys
301 - Deuce	210
502 - SDX	107

Surveys By Route And Lot

Total Surveys: 850

Lot A: 277

Lot B General: 256

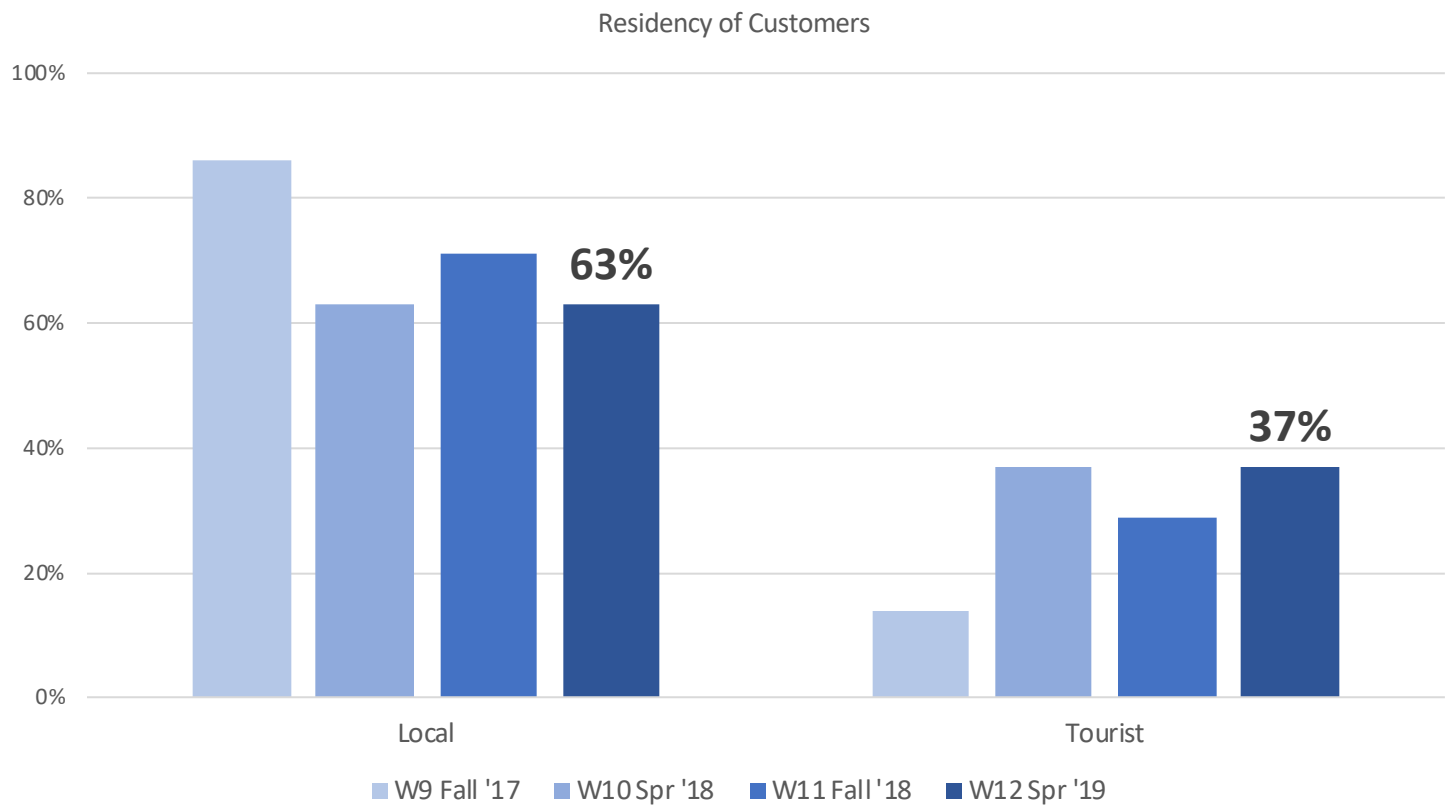
Lot B Resort: 317

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Residency of Customers

- 63% of surveys were completed by local residents, while 37% were completed by tourists.



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Agency Net Promoter Score

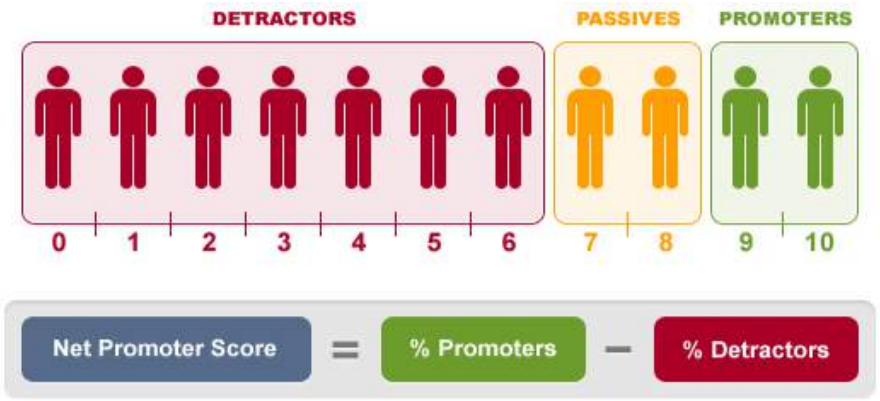


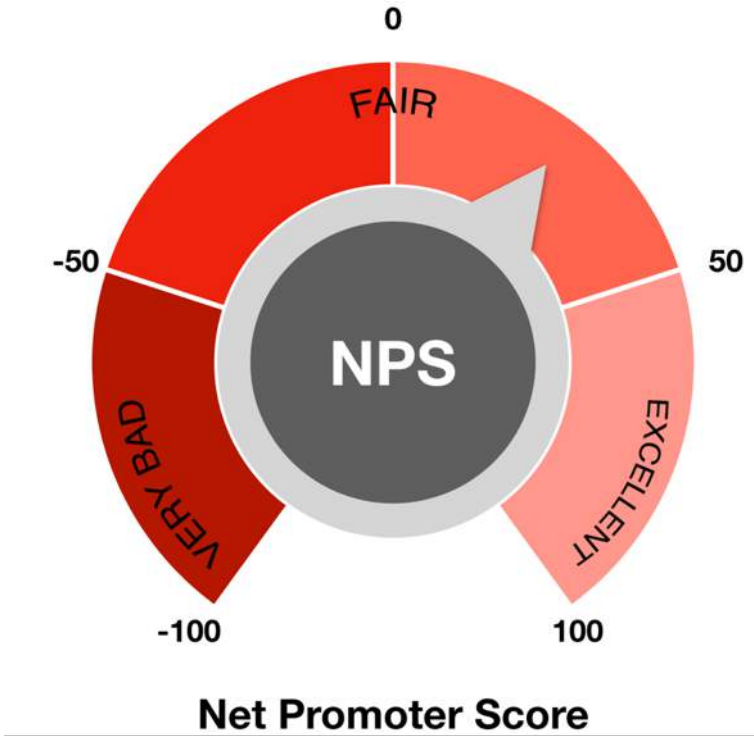
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Net Promoter Score

NPS poses the ultimate question:

"How likely would you be to recommend riding RTC to a friend or neighbor?"





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NPS: The Metric

Assesses loyalty and word of mouth favorability among customers

Introduced in the Harvard Business Review

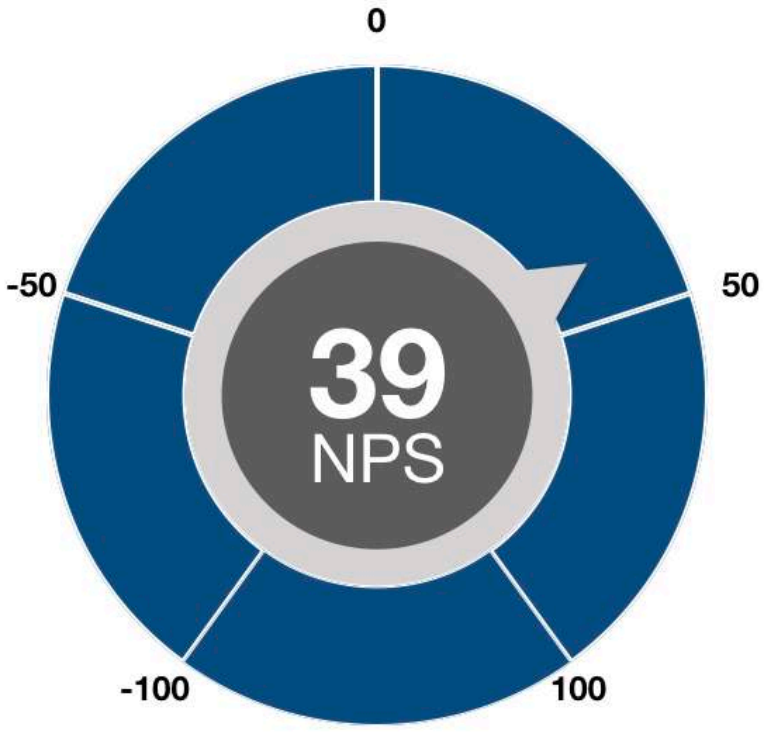
Allows for performance comparisons between organizations across different business sectors

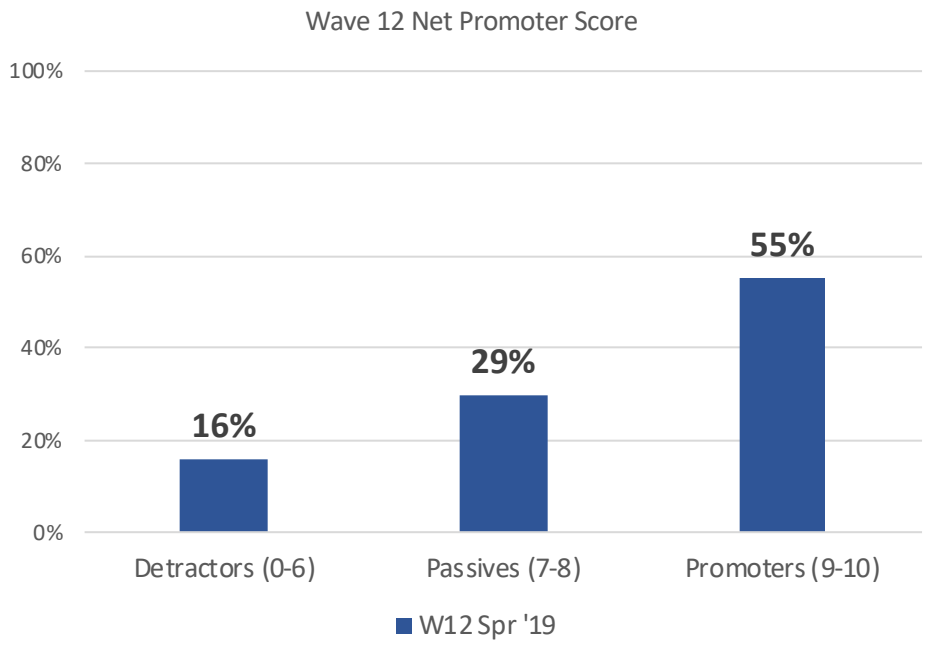


Organization	NPS
Costco	79%
Transit Agencies	32%
Airlines	23%
Car Rental Agencies	18%
Internet Service Providers	5%

NPS: Wave 12

Likelihood of recommending RTC





Compared to Industry Sample of

32%

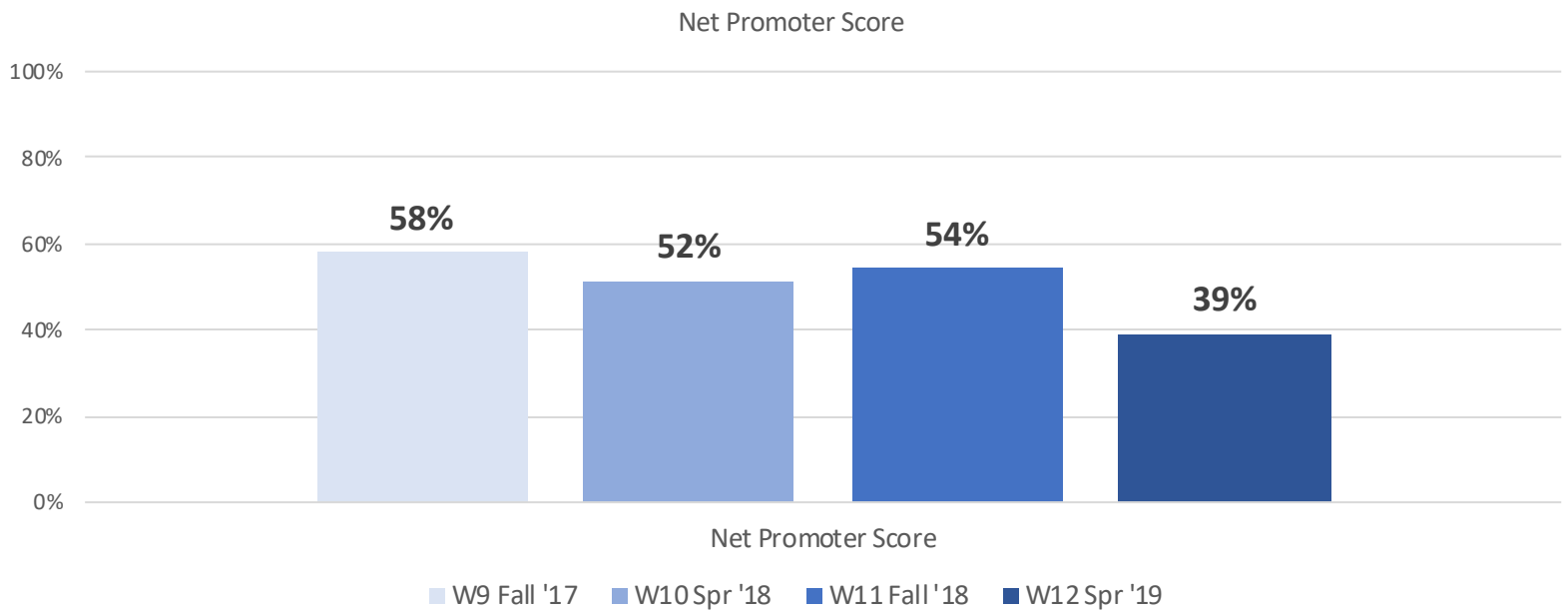
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NPS Comparison by Wave

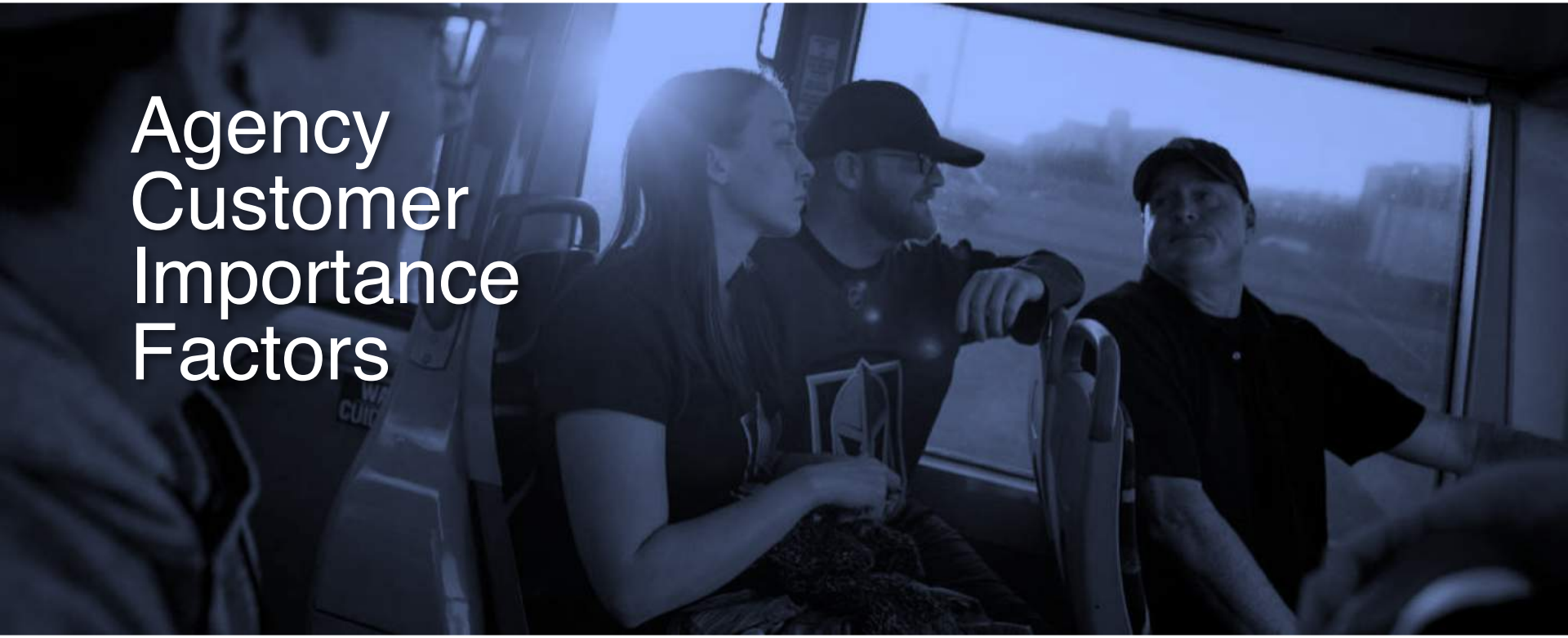
Likelihood of recommending RTC

- RTC's Net Promoter Score decreased by 28% from Wave 11.



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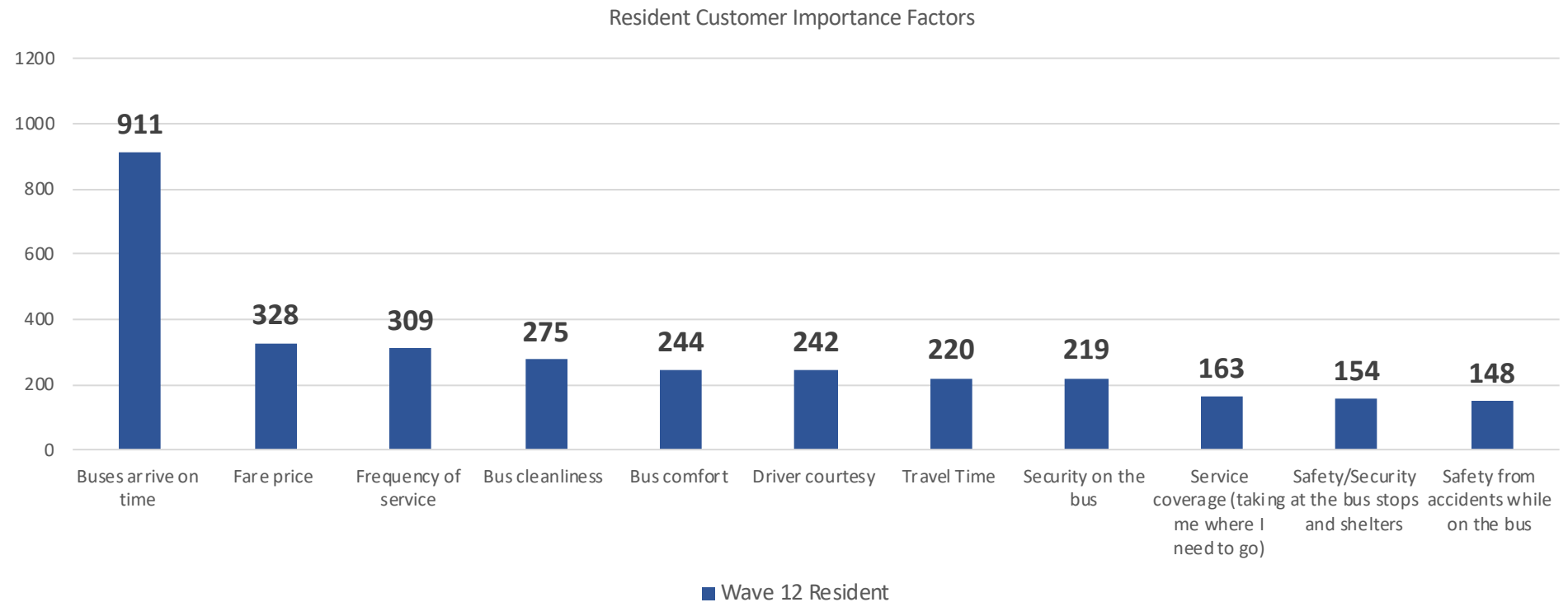
Agency Customer Importance Factors

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Metric: Top Customer Importance Factors - Residents

- Buses arriving on time is the most important element of service followed by fare price, frequency of service, and bus cleanliness.



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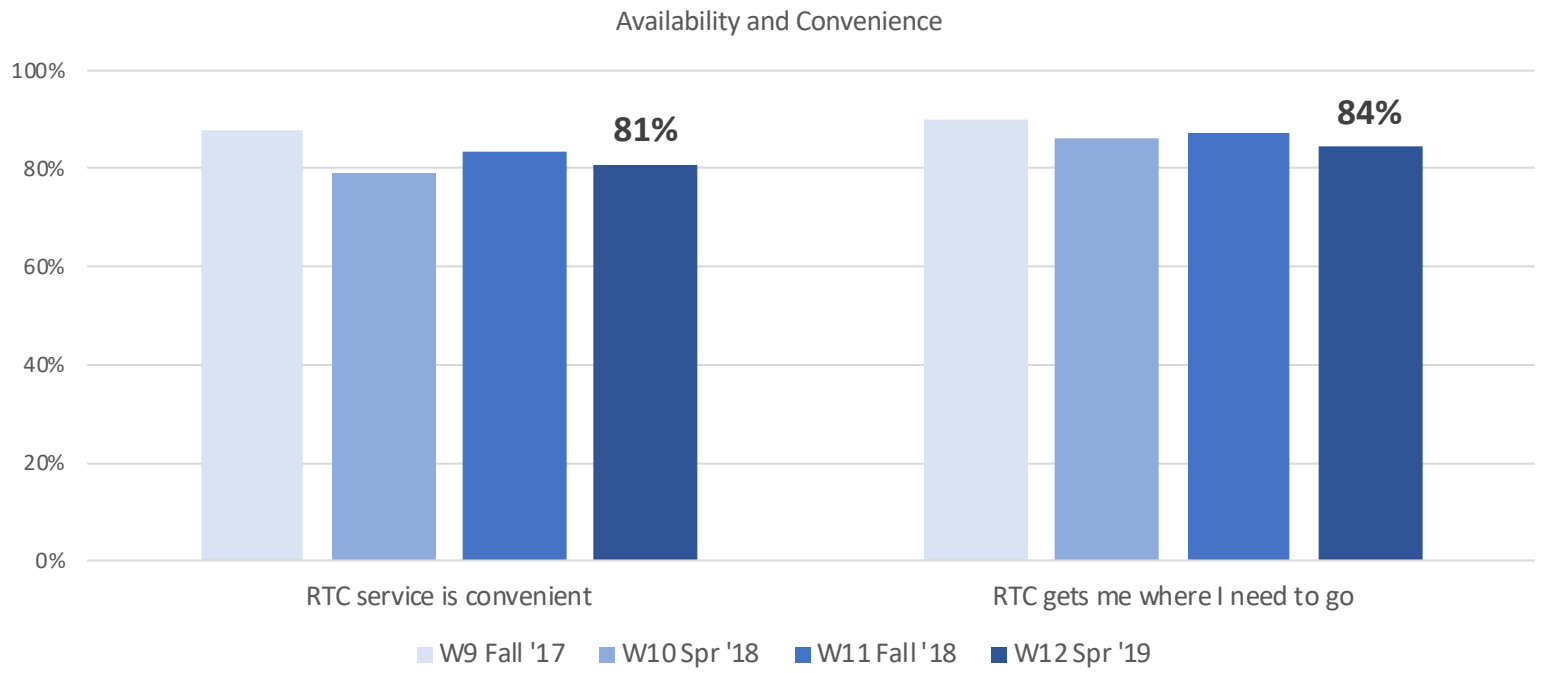
Agency Customer Impressions & Satisfaction

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Metric: Availability & Convenience

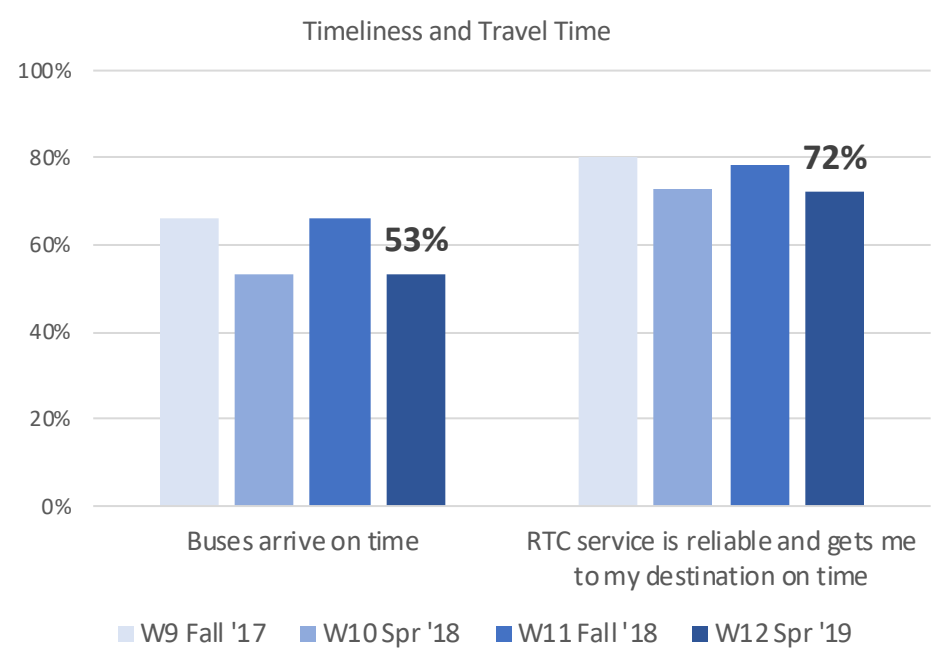
- Satisfaction with service convenience decreased 4% from Wave 11 to Wave 12.
- Satisfaction of customers indicating RTC gets me to where I need to go decreased 3% from Wave 11 (87%) to Wave 12 (84%).

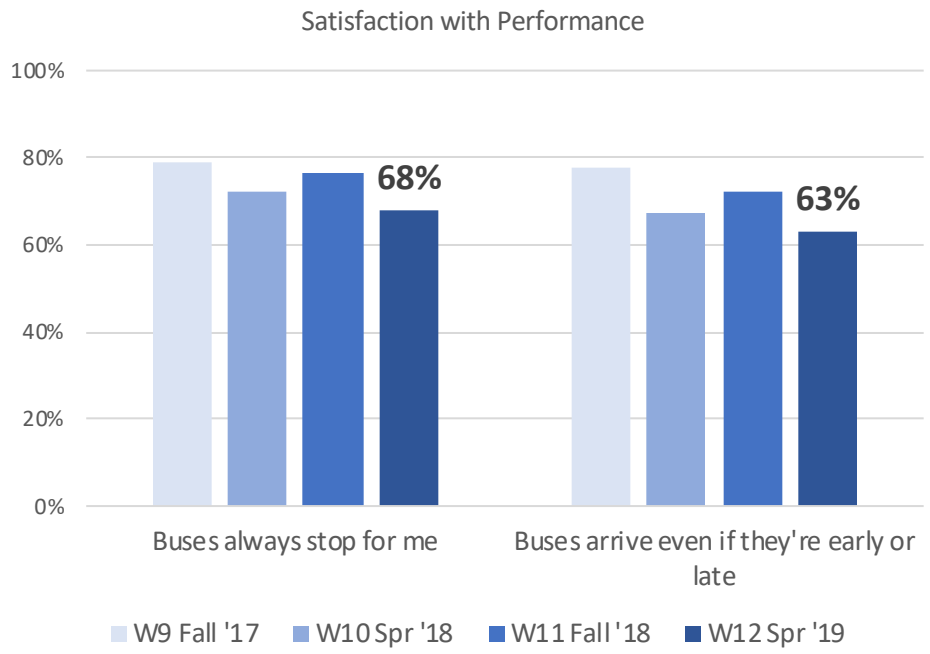


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Metric: Timeliness & Travel Time

- Customers' impression of on-time performance in Wave 12 decreased 20% compared to Wave 11.
- Satisfaction with buses stopping and arriving even if they're not on time decreased by double digits, -12% and -14% from Wave 11 to Wave 12, respectively.



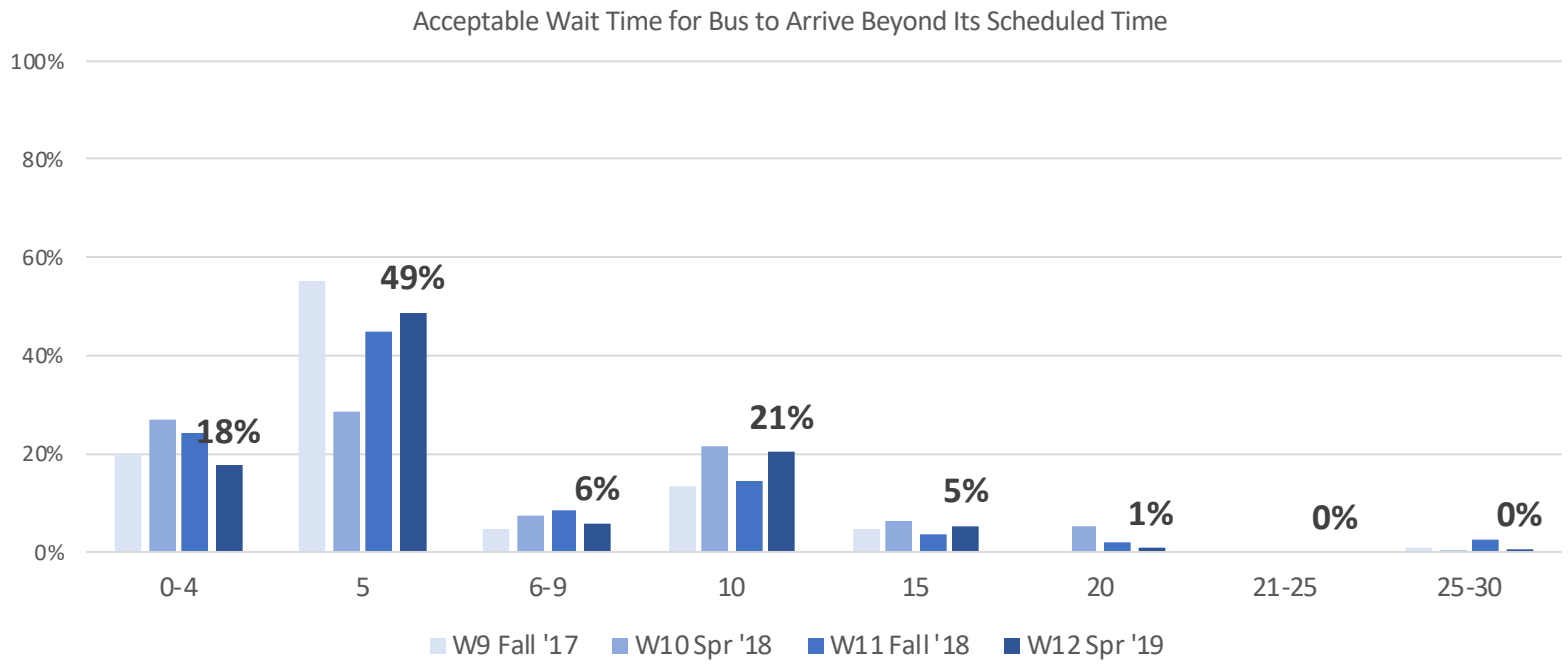


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Metric: Acceptable Wait Times

- 33% of customers in Wave 12 indicate satisfaction with a bus arriving more than 5 minutes after its scheduled time, a 6% increase from Wave 11.



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

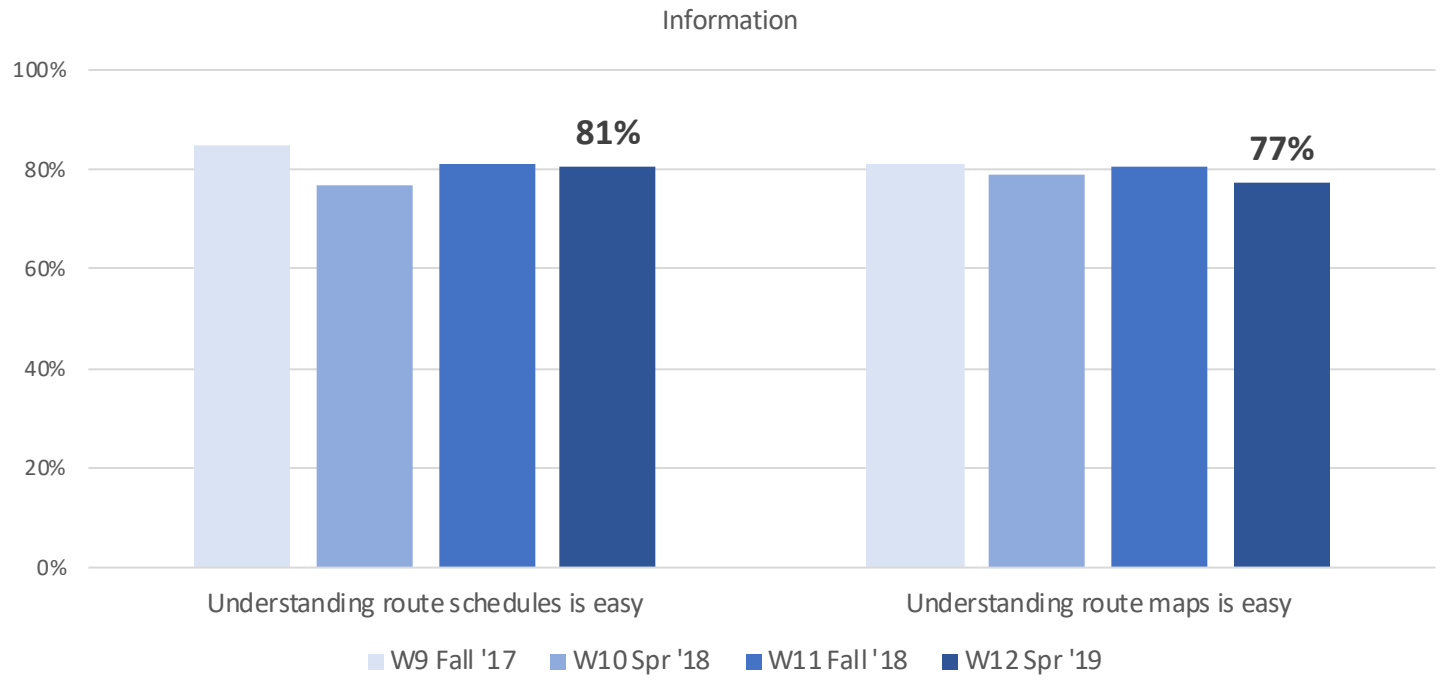
Note: Question is asked only if response to "Buses arrive on time" was not Strongly Agree or Agree. Wave 11 and 12 responses includes ranges.

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Metric: Information

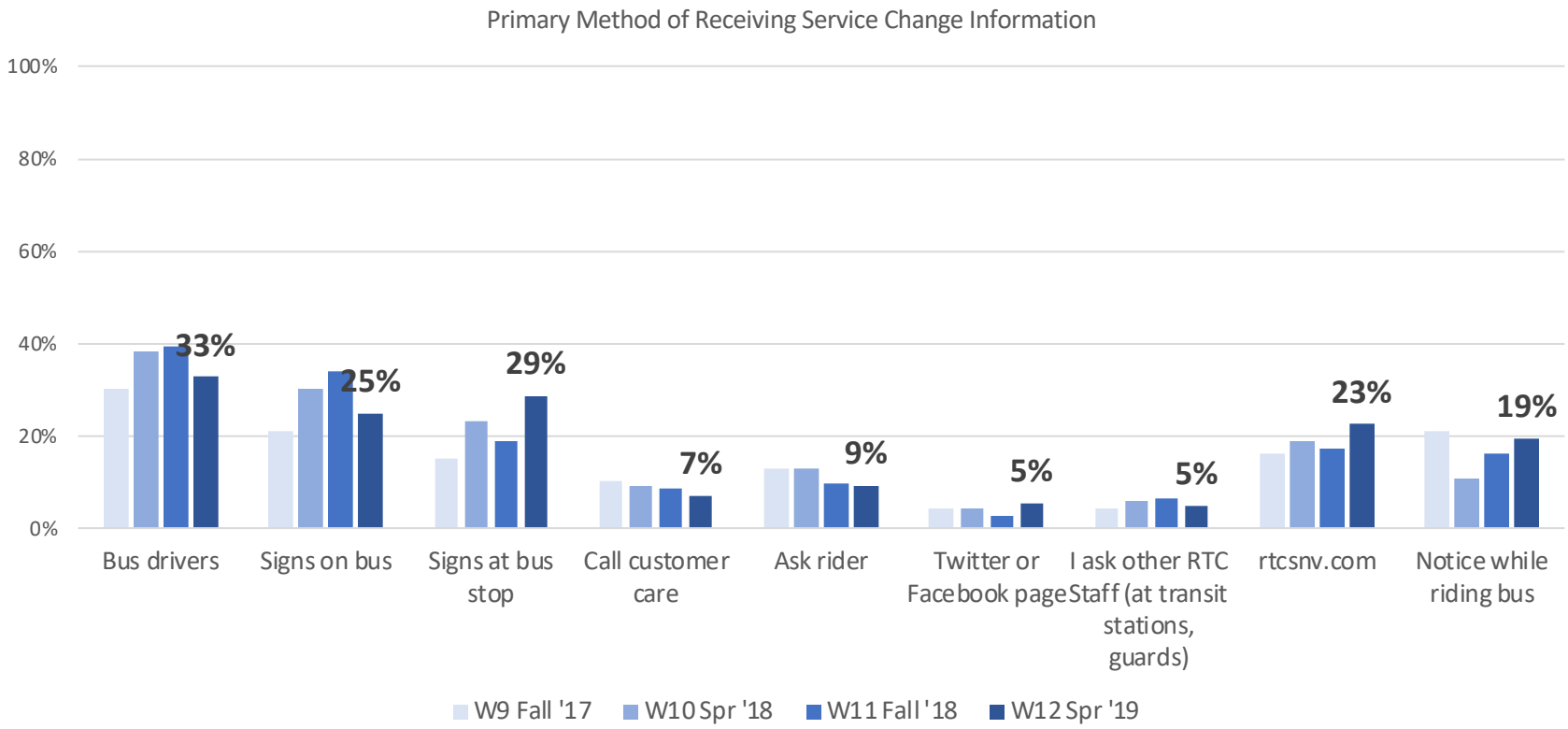
- Customers continue to feel that understanding route schedules and maps is easy.
- 5% fewer customers in Wave 12 feel that route maps are easy to understand compared to Wave 11 (81%).



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Metric: Information

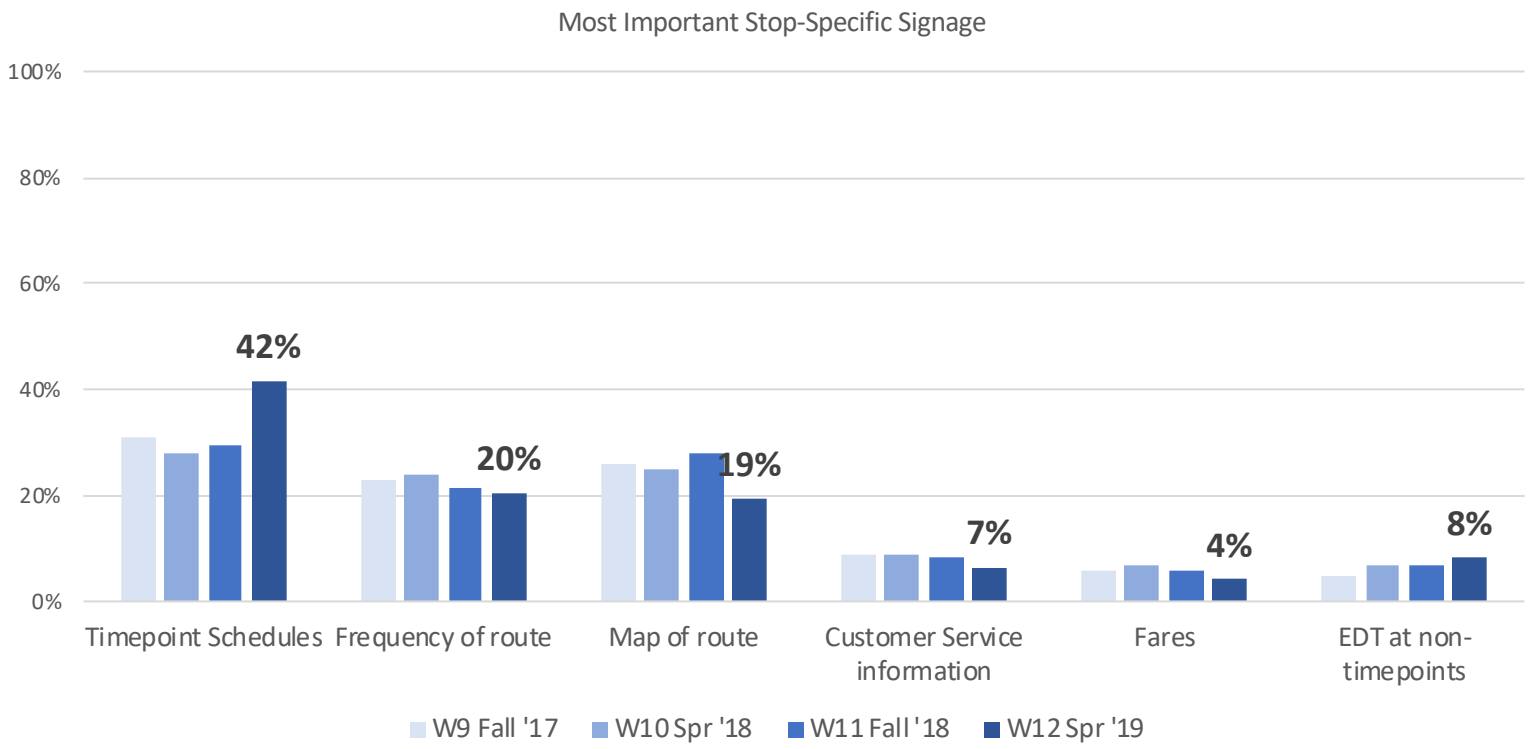
- Customers are most likely to receive service change information from a bus driver or signs posted at the bus.



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Metric: Information

- When forced to rank the most important stop-specific signage, customers in Wave 12 indicate timepoint schedules are the most important stop-specific signage, an increase of 40% from Wave 11.

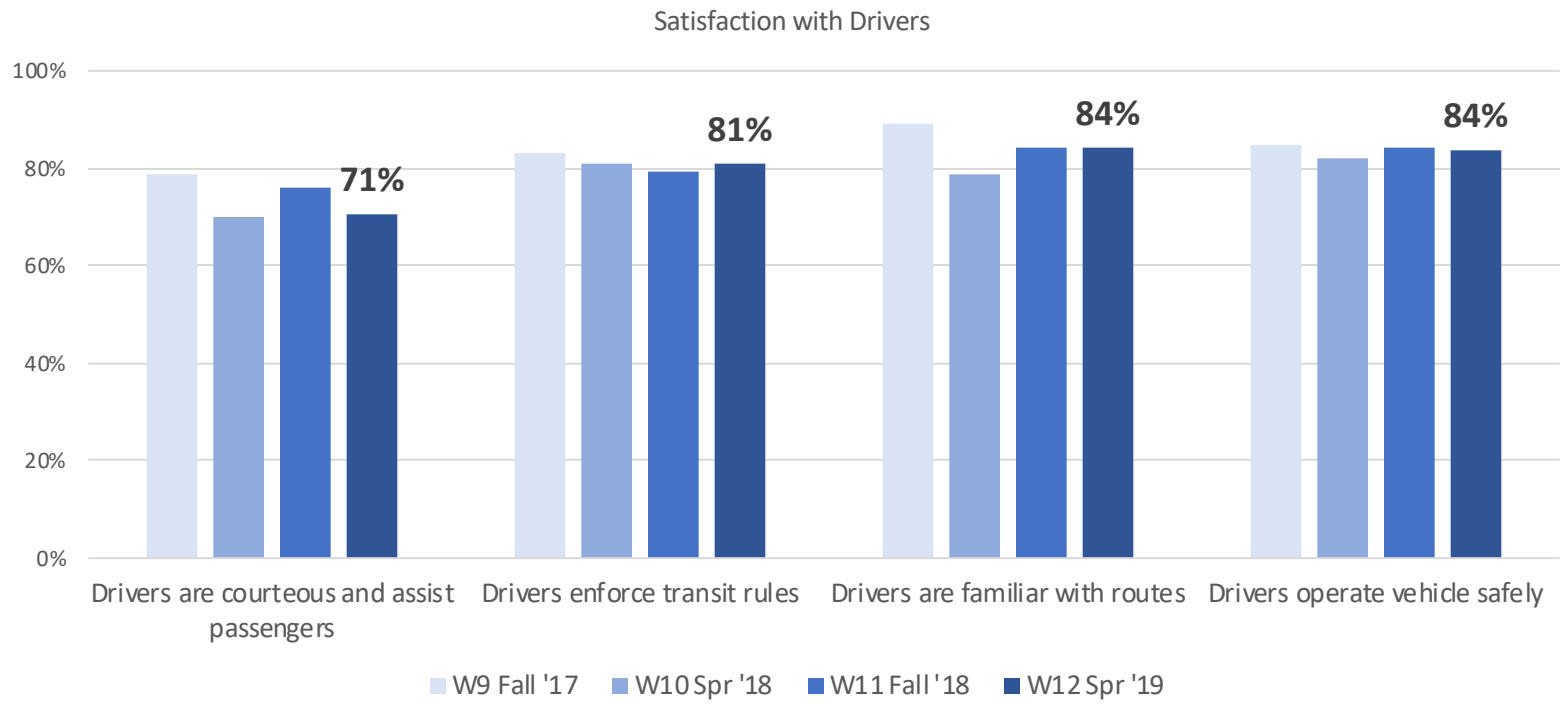


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Metric: Riding the Bus & Bus Driver Customer Service

- Satisfaction with drivers being courteous and assisting passengers decreased 7% from Wave 11 (76%).
- Satisfaction with drivers enforcing transit rules increased 3% from Wave 11 (79%) to Wave 12.

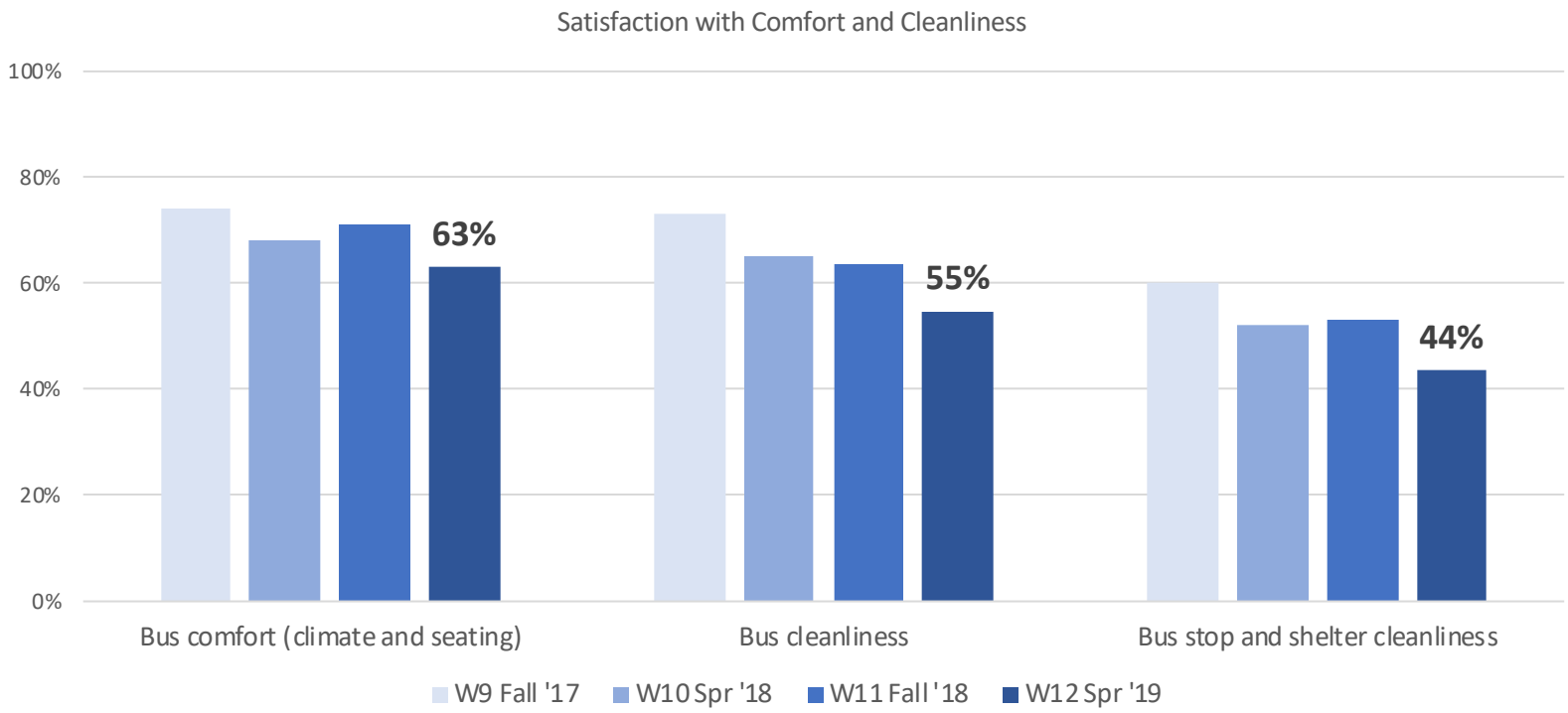


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Metric: Comfort & Cleanliness

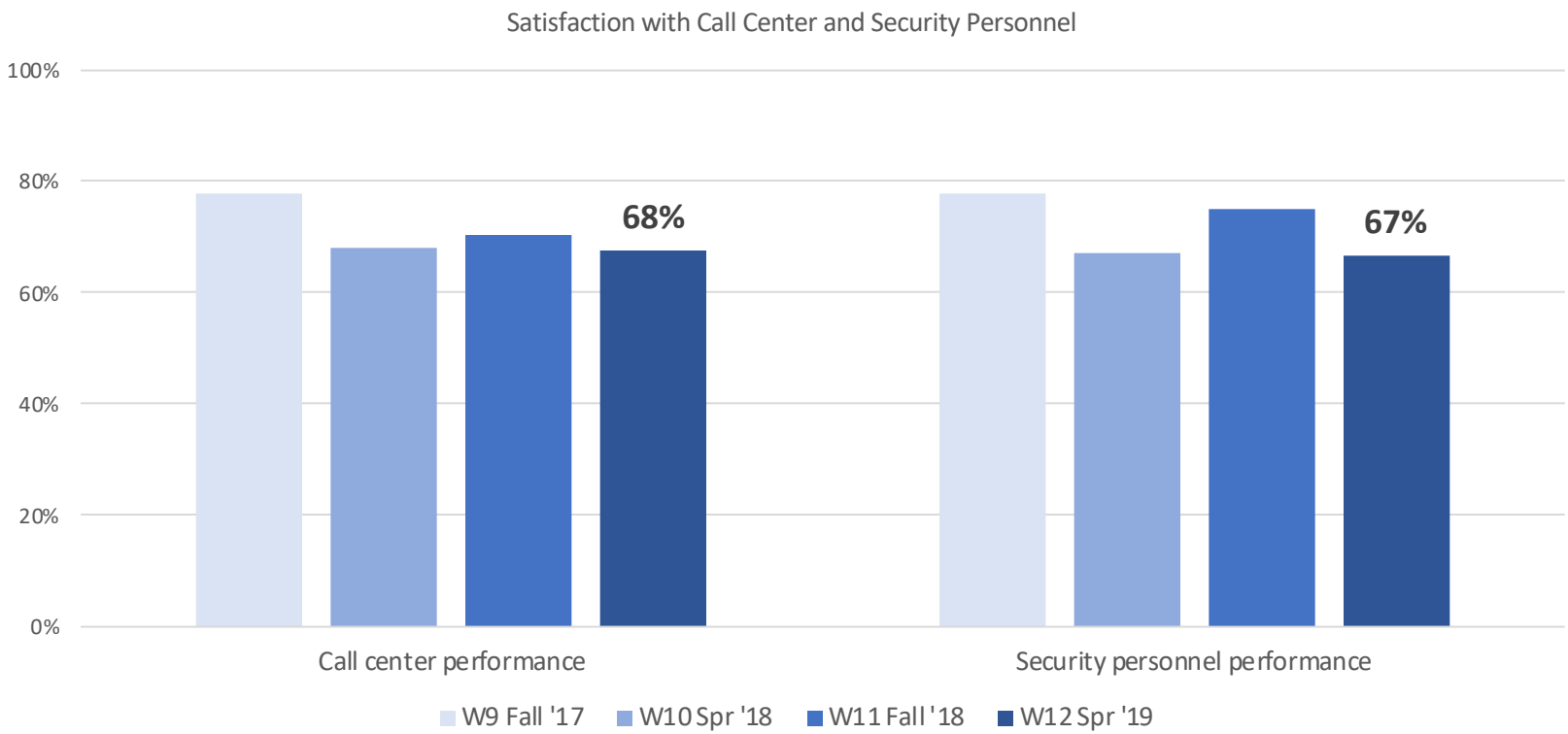
- All comfort and cleanliness metric deceased by more than 10% in Wave 12. Bus stop and shelter cleanliness decreased the most, by 17% compared to Wave 11 (53%).
- Bus cleanliness continued a downward trend and decreased 13% from 63% in Wave 11.



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Metric: Call Center & Security Personnel

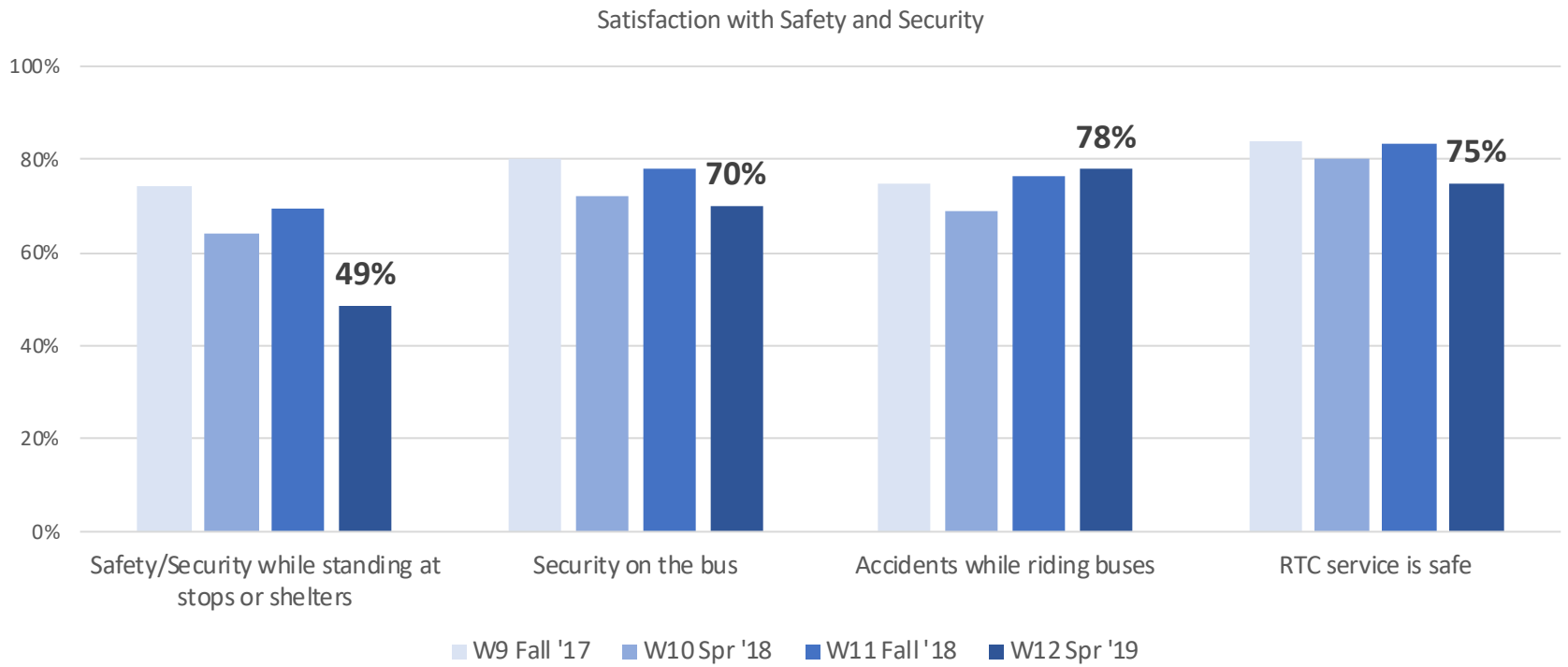
- Satisfaction with security personnel decreased 11% in Wave 12 compared to Wave 11.



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Metric: Safety & Security

- Satisfaction with accidents while riding the bus increased by 3% from Wave 11 (76%).
- All other metrics decreased, with a 30% decrease in response to safety/security at stops or shelters from Wave 11 (70%).

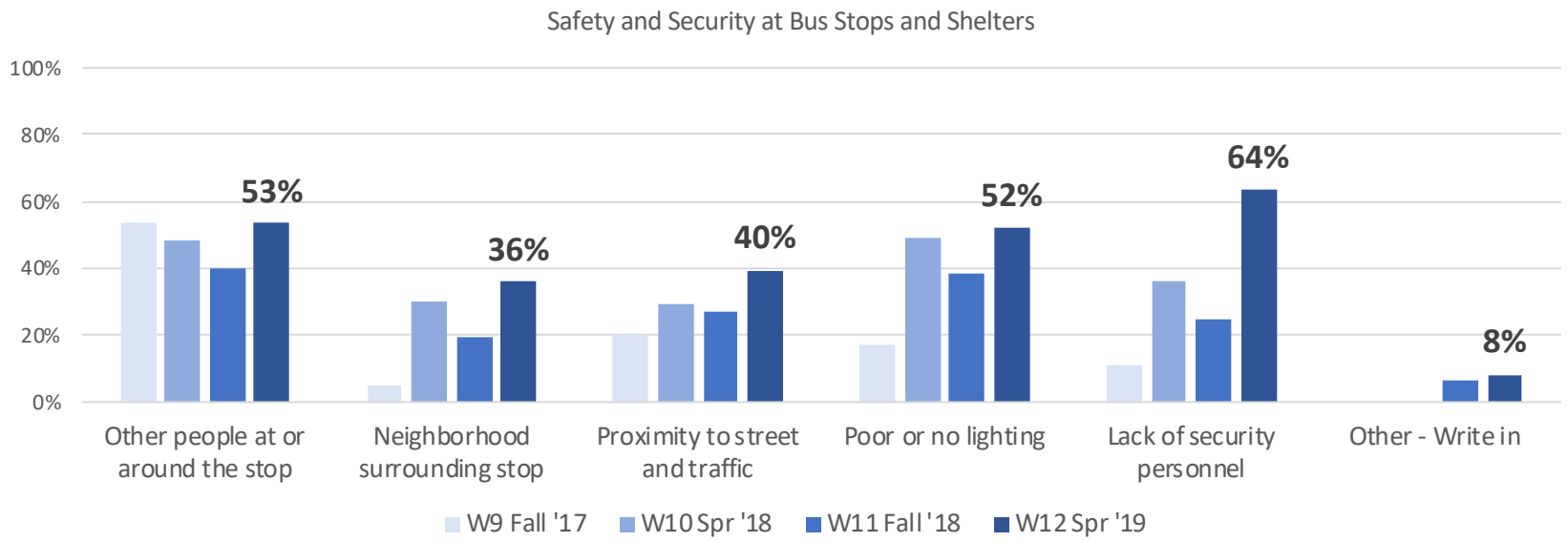


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Metric: Safety & Security at Bus Stops & Shelters

- Customers who were not satisfied with safety/security at bus stops and shelters were asked to identify the areas which make them feel the most unsafe.
- Customers are most concerned with a lack of security personnel (156% increase) and other people at or around the stop (33% increase)
- The percentage of customers concerned with each factor increased in Wave 12 (2.4 selections per customer). Comparatively, on average each customer selected an average of 2 factors in Wave 10, and just 1.5 in Wave 11.



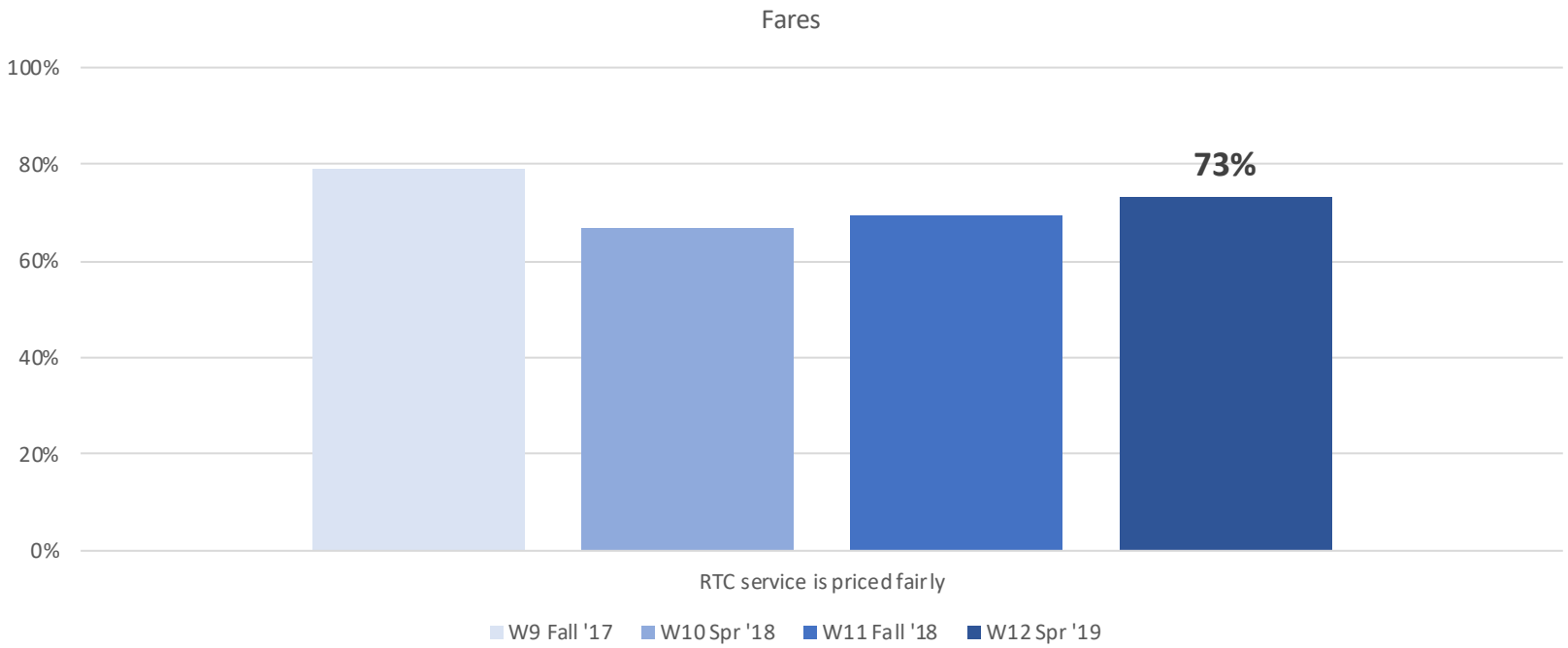
Note: Multiple selections allowed.

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Metric: Fares

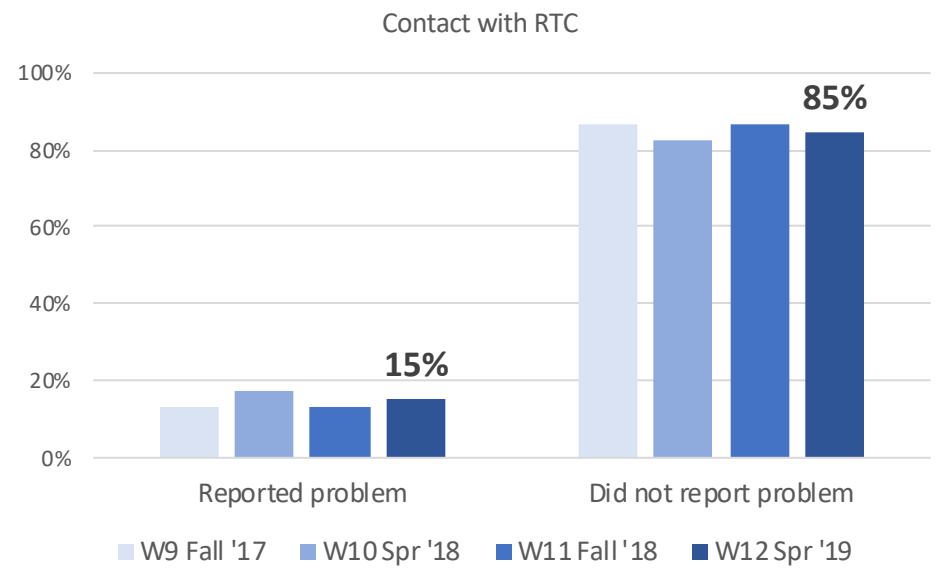
- Customers in Wave 12 indicate a slight increase (4%) of satisfaction in believing RTC is priced fairly compared to Wave 11.

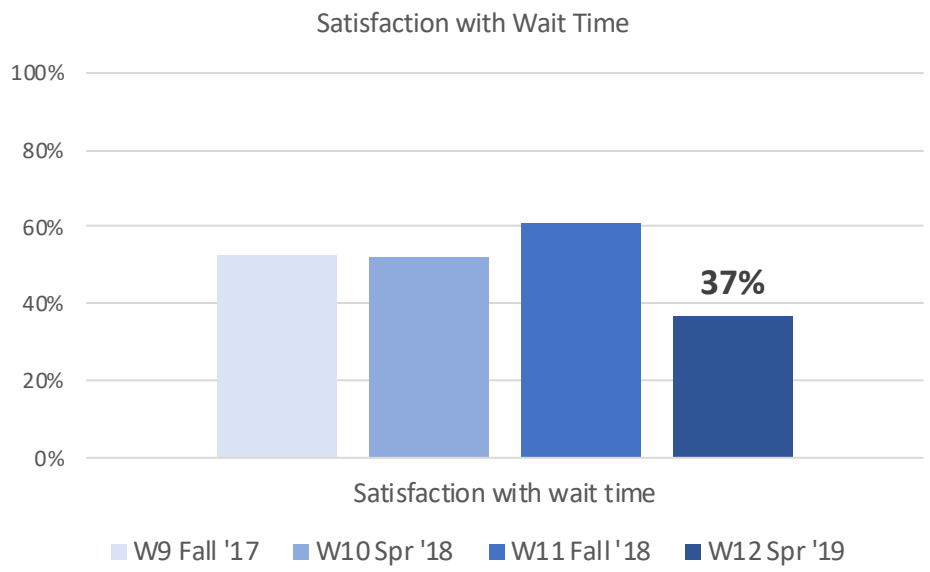


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Metric: Contacting Customer Service

- 15% of customers have contacted RTC customer service in the past 3 months with a problem.
- Customers satisfied with wait time in Wave 12 decreased 39% from Wave 11.





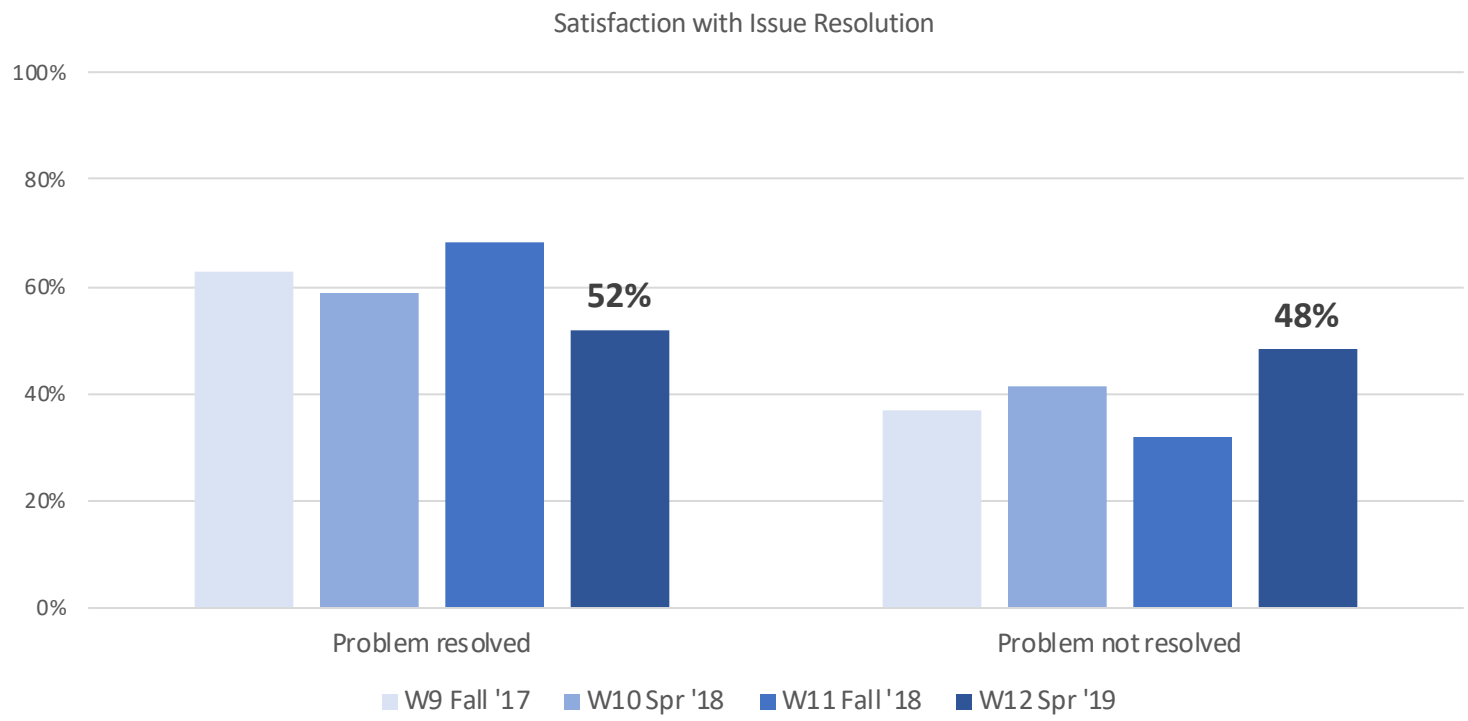
In the last 3 months, have you contacted RTC about a problem you've had, either on the phone, online or in person?

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Metric: Problem Resolution

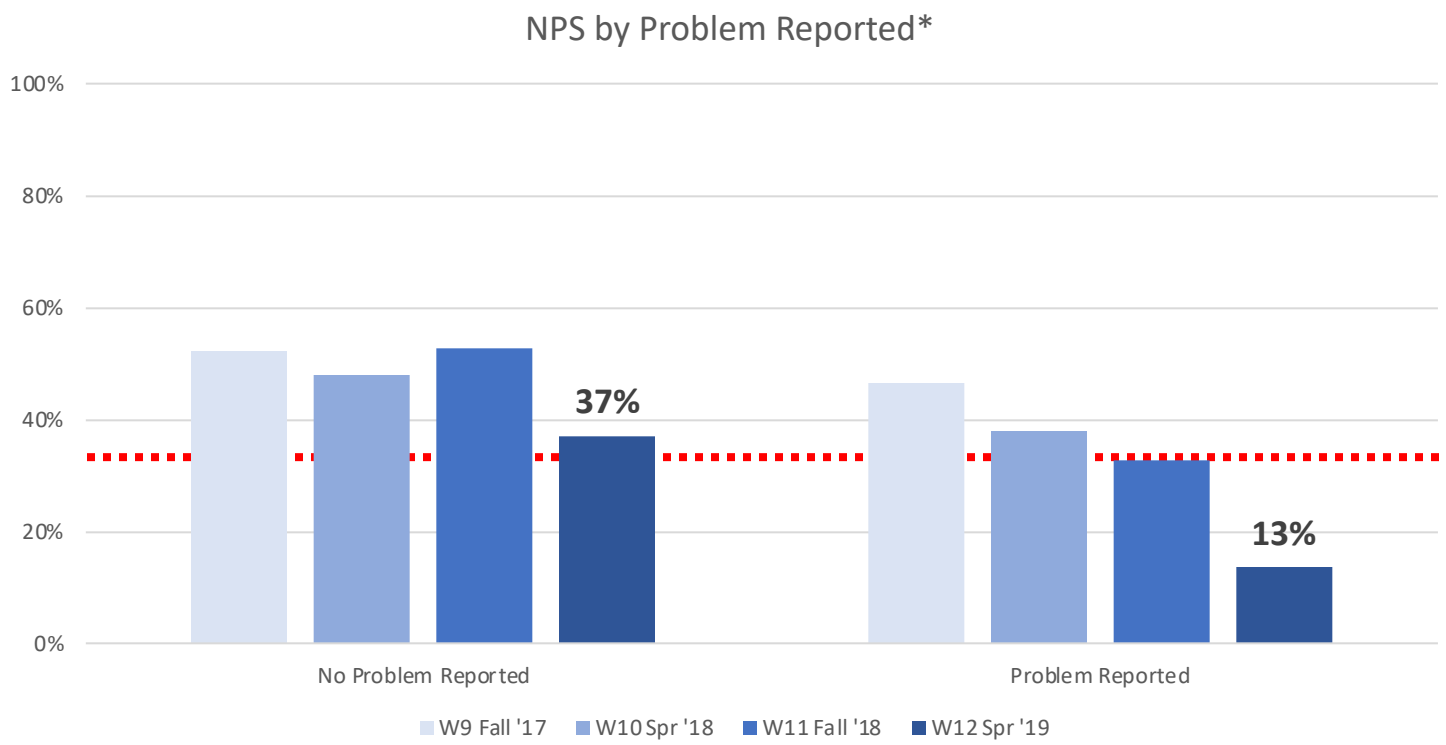
- Customer satisfaction with problem resolution decreased 24% in Wave 12 to 52%.



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Metric: NPS by Problem Reported

- Customers who report a problem are 65% less likely to recommend RTC than those who do not report a problem.



Overall Resident NPS 33%

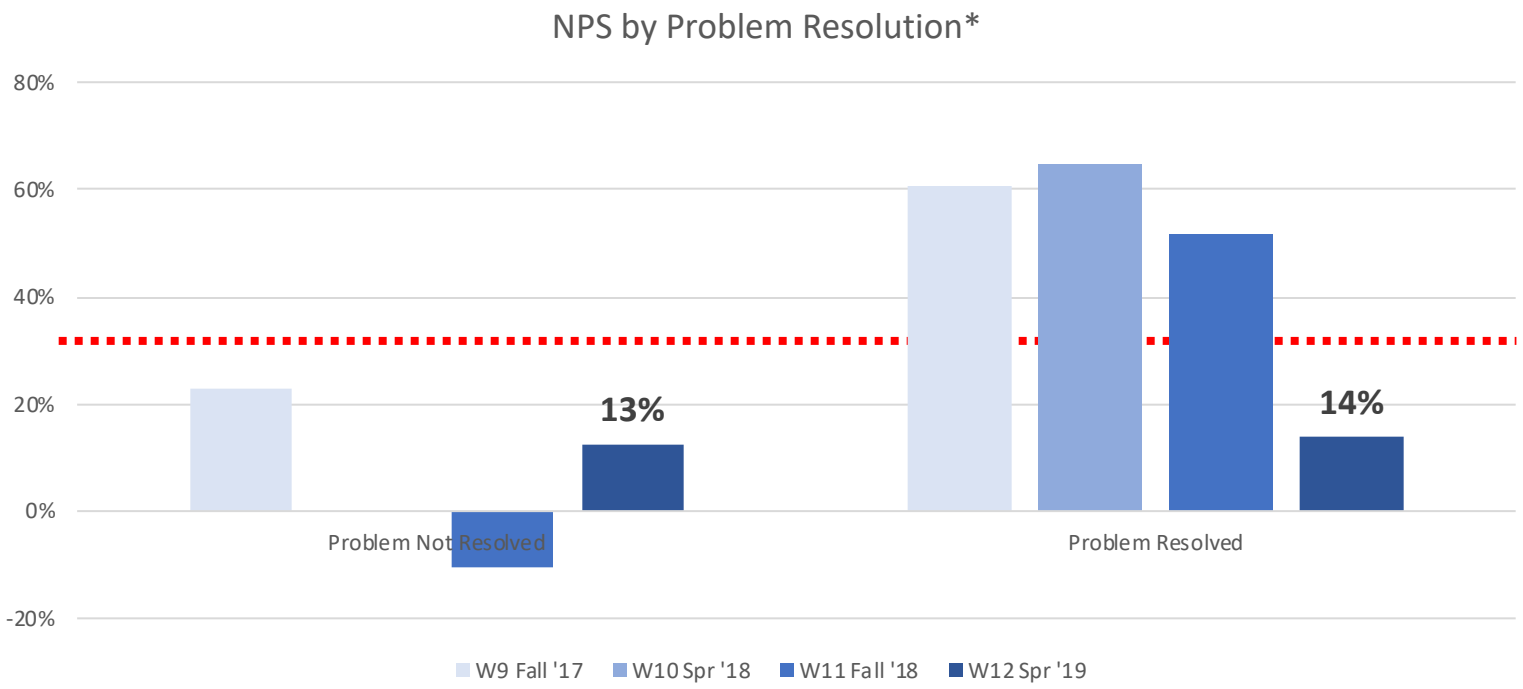
*Only asked of customers who are residents

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Metric: NPS by Problem Resolution

- Customer satisfaction with problem resolution in Wave 12 resulted in similar Net Promoter Scores.
- Customer Net Promoter Scores for those who's problem as resolved decreased 73% from Wave 11 to Wave 12.



Overall Resident NPS 33%

n=40 n=43

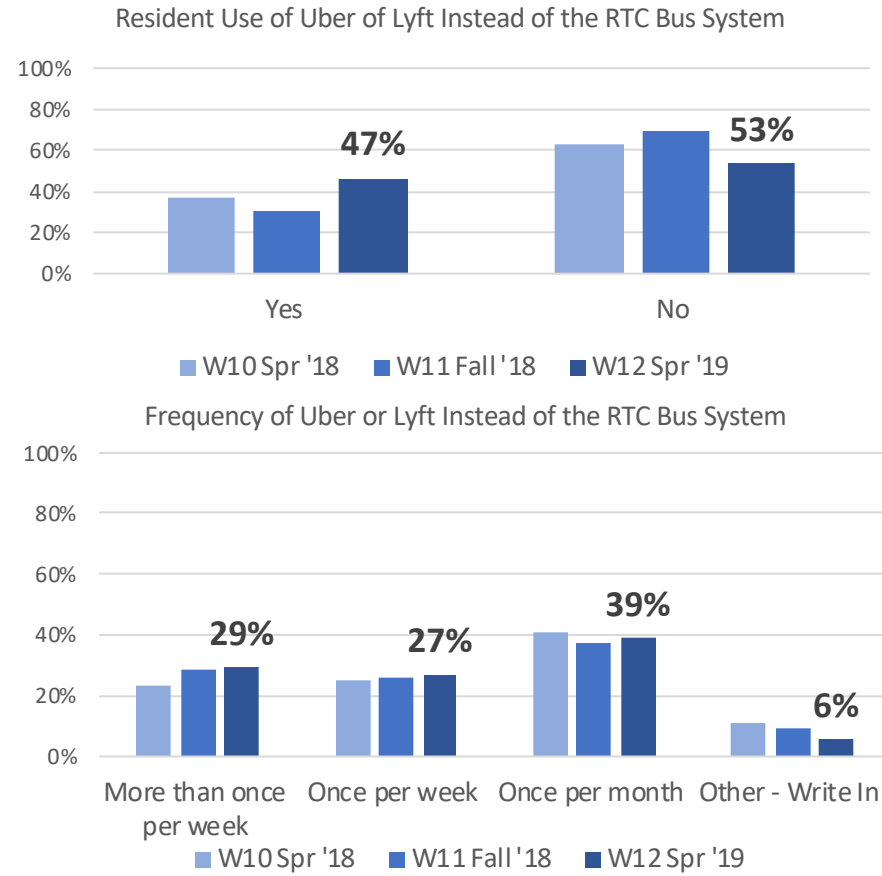
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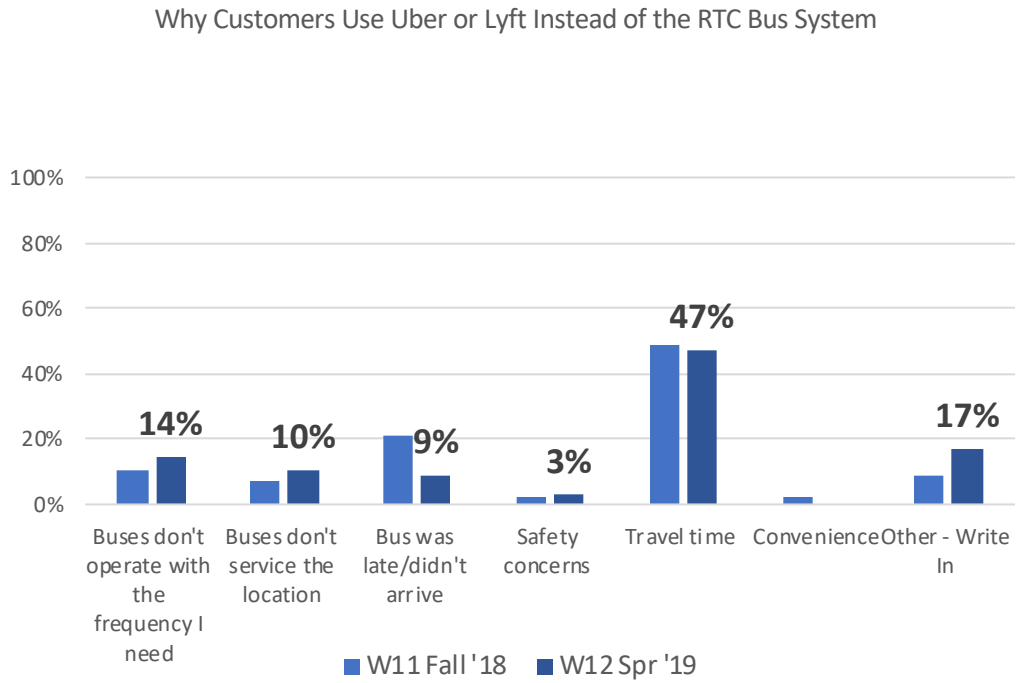
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Metric: Alternative Transportation Options

- 47% of customers indicate they use Uber or Lyft instead of the RTC bus system, an increase of 52% from Wave 11. Of these customers, 56% indicate they use those services at least once per week.
- 47% of customers who use an alternative transportation option indicate the most common reason for using Uber or Lyft is due to travel time.





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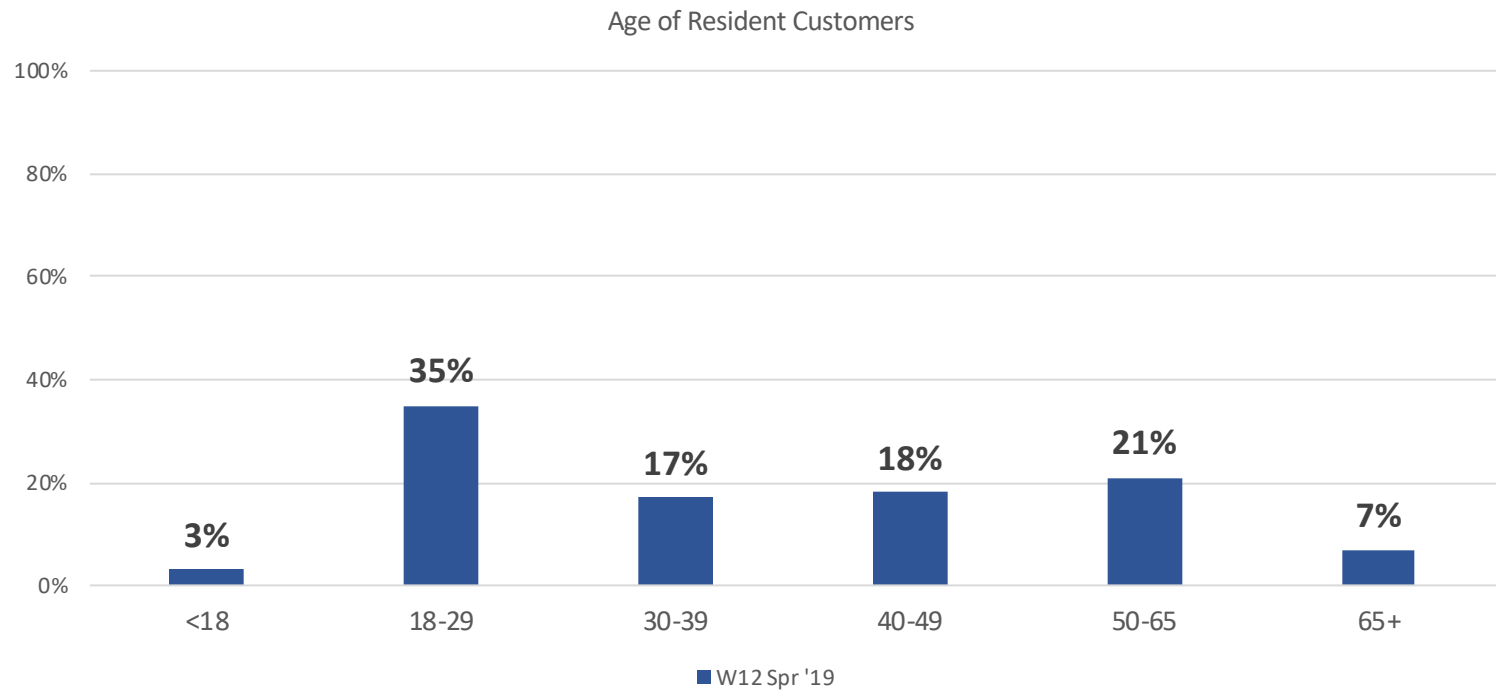
Resident Customer Characteristics

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Age of Customers

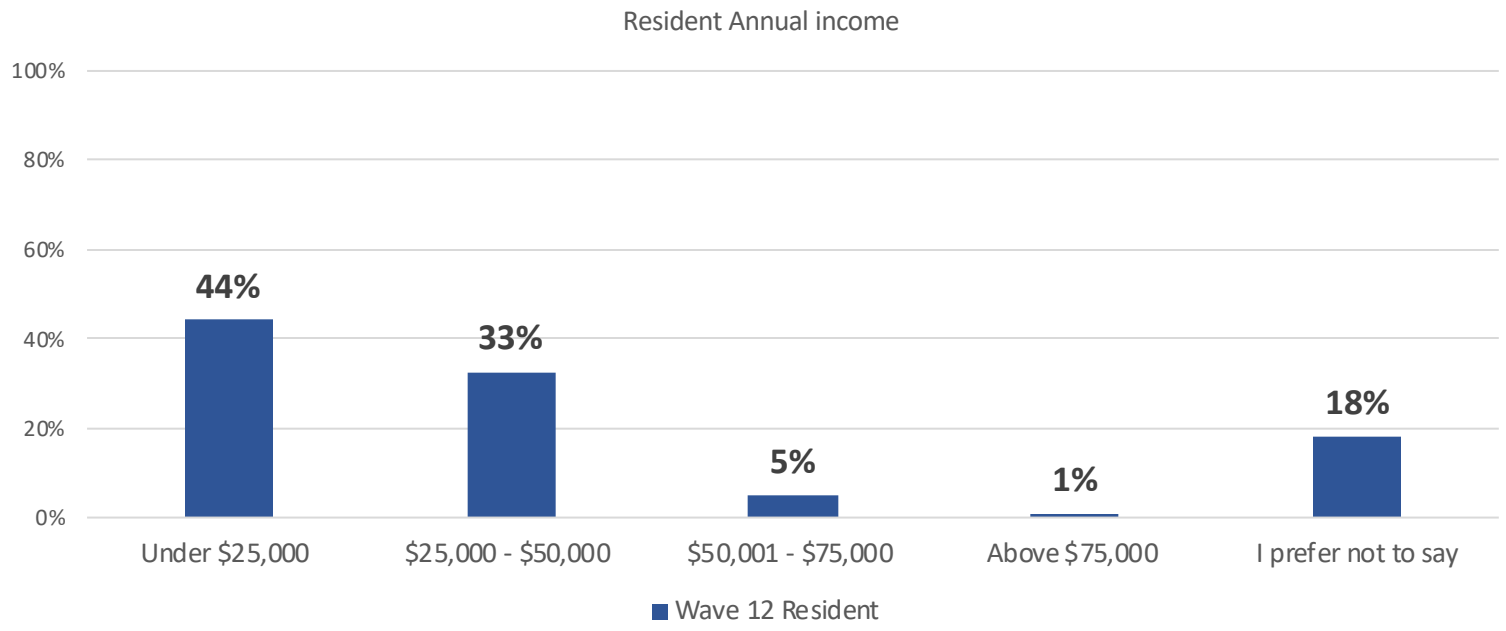
- 28% of customers are above the age of 50.



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Income of Customers

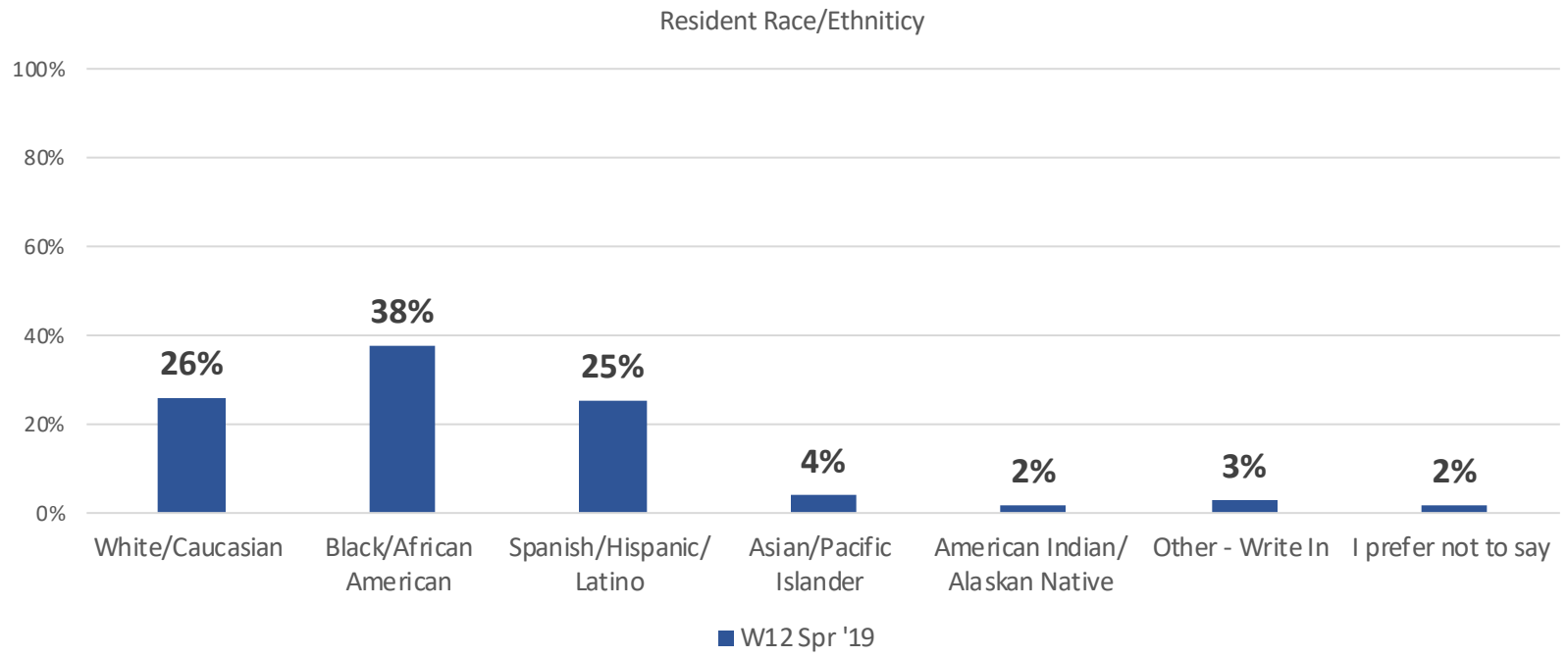
- 77% of customers have an annual income at or below below $50,000.



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Race of Customers

- 26% of customers in Wave 12 are White/Caucasian.



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Gender Identity of Customers

- 54% of customers in Wave 12 are male.

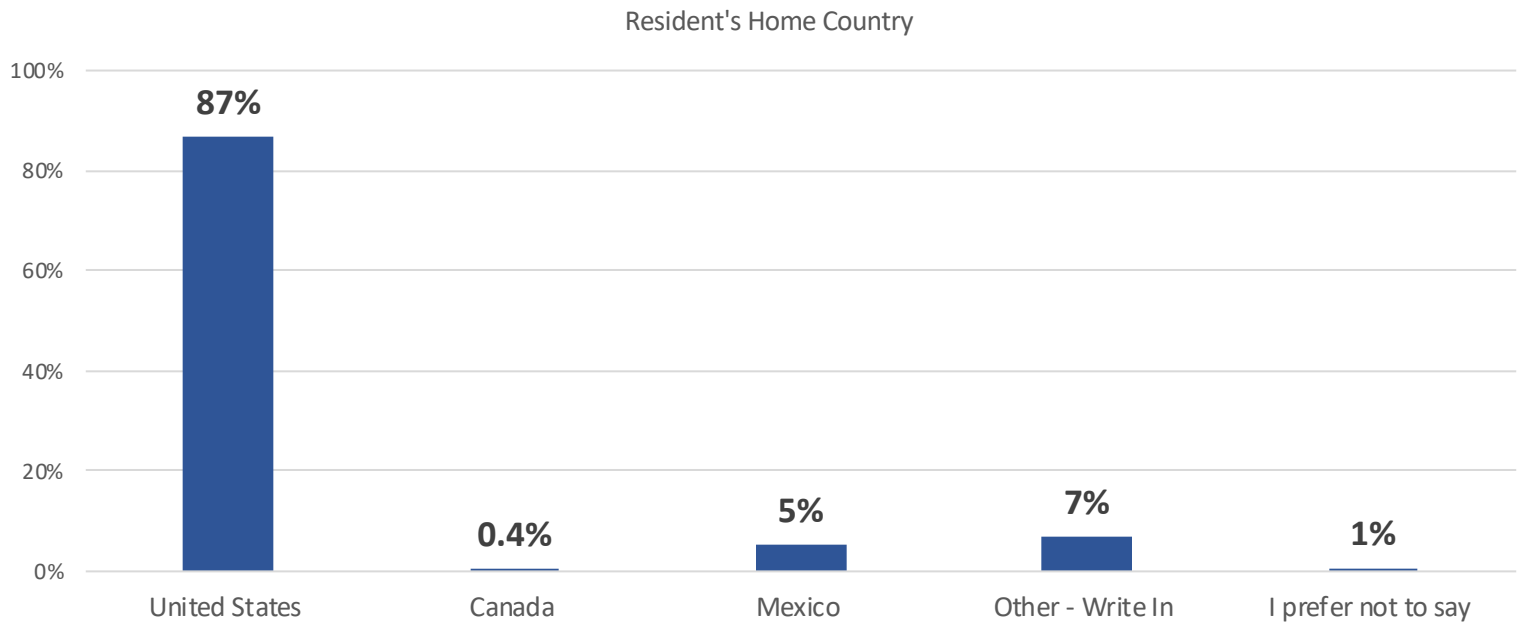


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Home Country of Customers

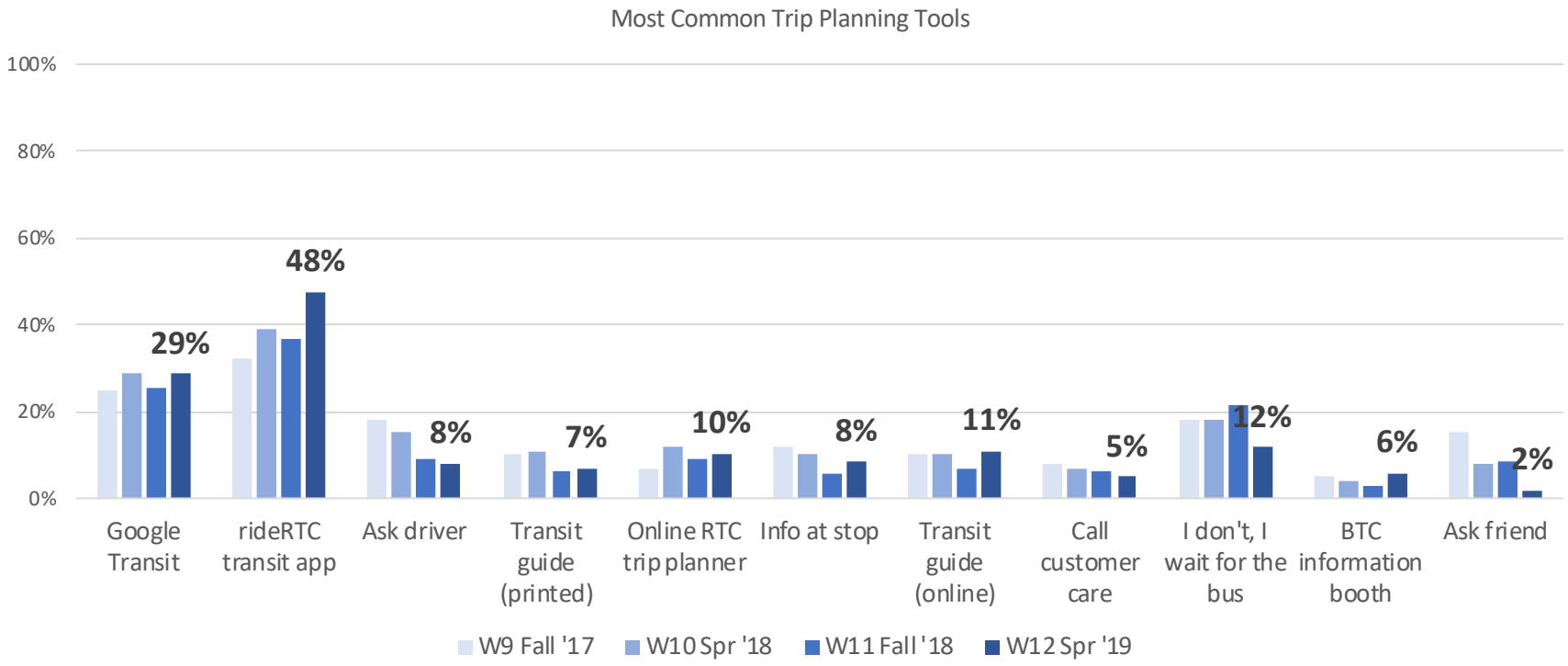
- 87% of customers are from the United States.



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Trip Planning

- The rideRTC app continues to be customers' most common trip planning tool (30% increase from Wave 11 to Wave 12), followed by Google Transit.

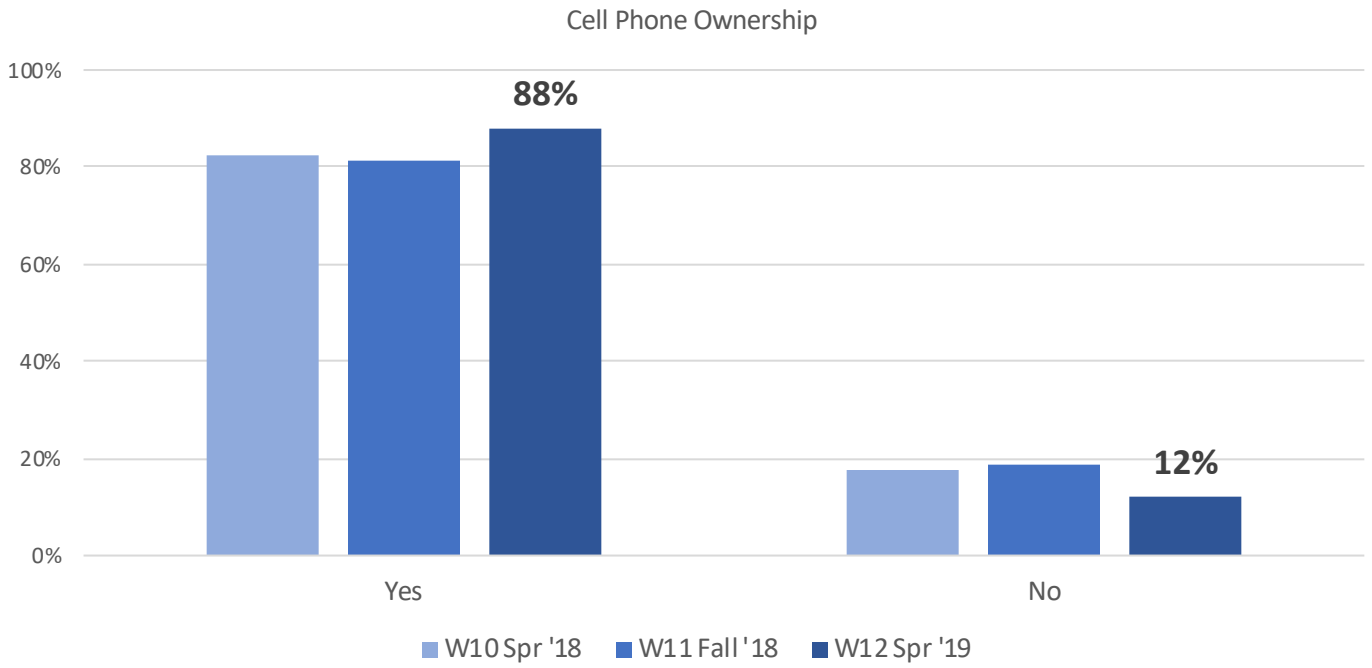


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Cell Phone Ownership

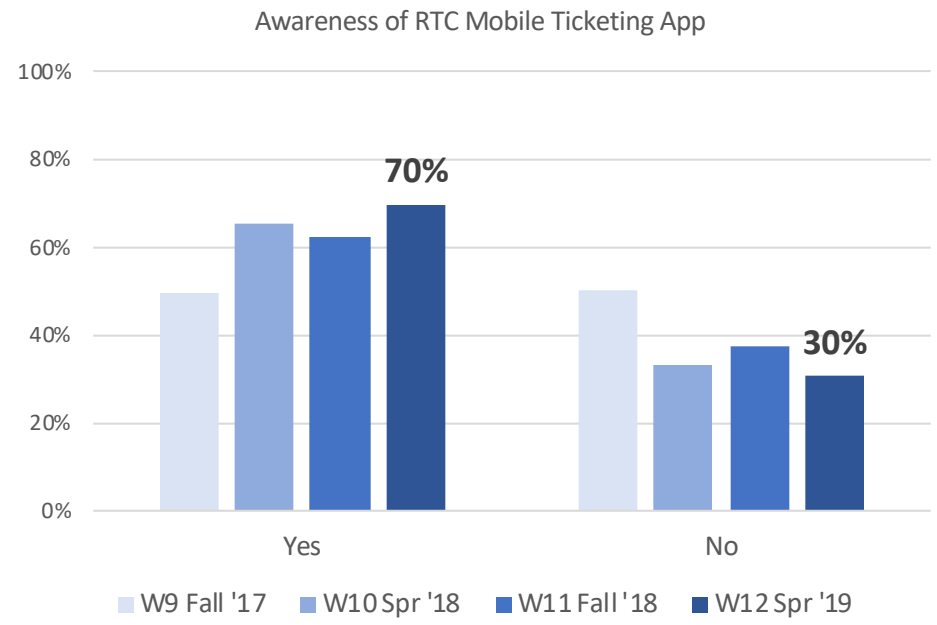
- 88% of customers indicate they own a cell phone, an increase of 9% from Wave 11.

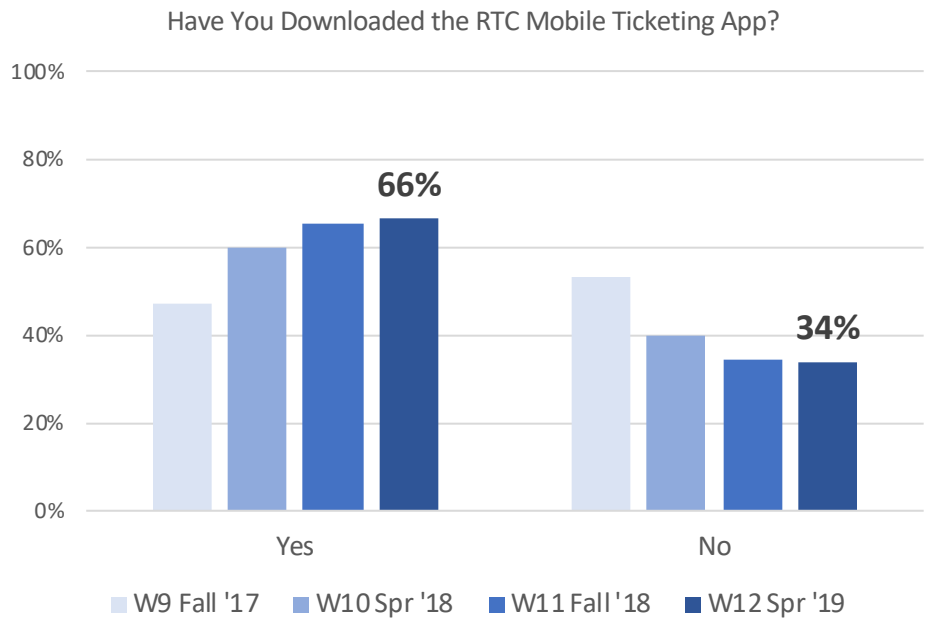


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Mobile Ticketing App

- 70% of customers indicate they are aware of the RTC mobile ticketing app, an increase of 13% from Wave 11.
- Of the customers who are aware of the mobile ticketing app, 66% have downloaded it, similar to Wave 11.



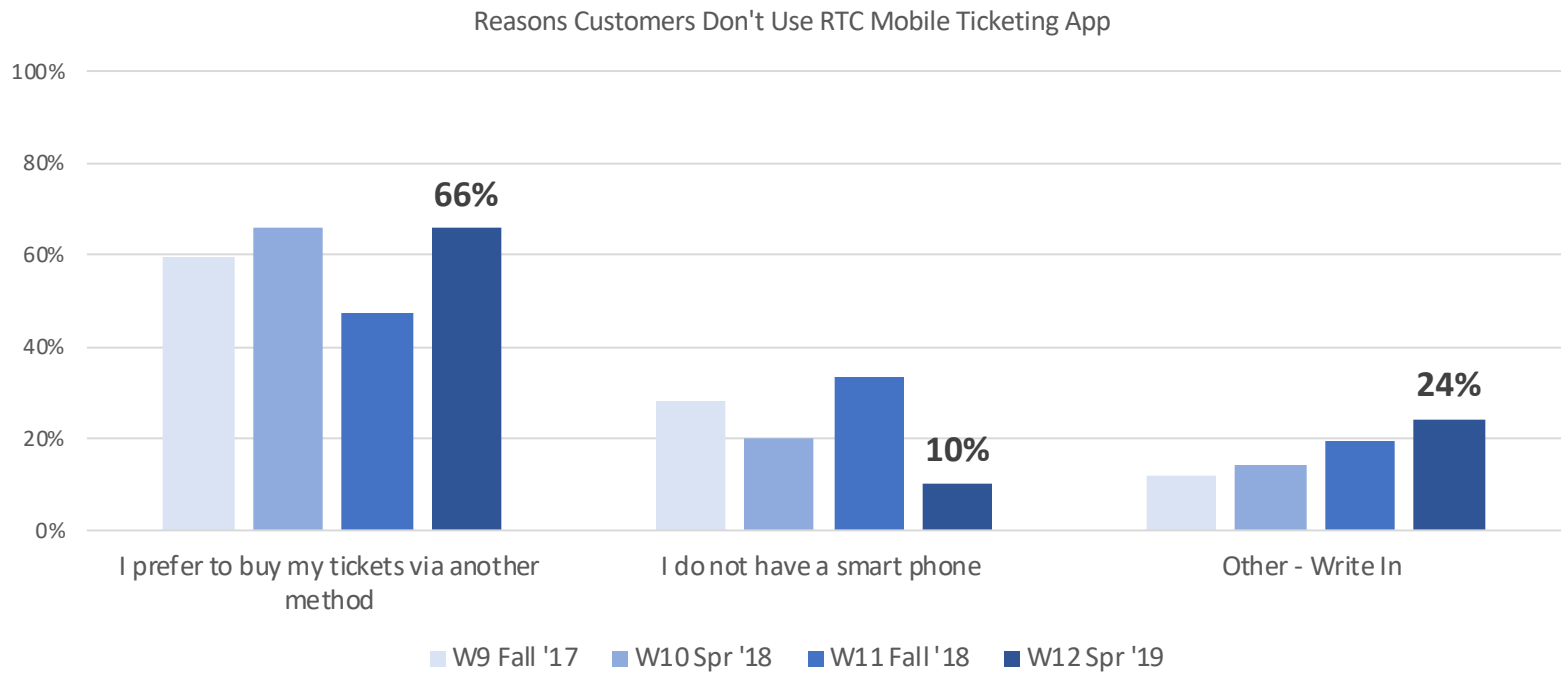


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Mobile Ticketing App

- 66% of customers in Wave 12 indicate they prefer to buy their tickets via another method as the reason they do not use the RTC mobile ticketing app, an increase of 40% from Wave 11.



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Tourist Customer Satisfaction

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Tourist Results Overview

RTC's tourist Net Promoter Score (NPS) for fixed route buses is 69%, 116% above an industry sample.

On-time performance is the most important element of service to tourist customers, followed by frequency of service.

Customers are most satisfied with transit ambassadors' knowledge (95%) and helpfulness (93%), RTC taking them where they need to go (93%) and drivers are familiar with RTC bus routes (93%).

Customers are least satisfied with safety and security while standing at bus stops or shelters (71%), on-time performance (77%), and fare price (78%).

47% of customers also use Uber or Lyft in addition to the RTC bus system during their visit to Las Vegas.



Tourist Net Promoter Score

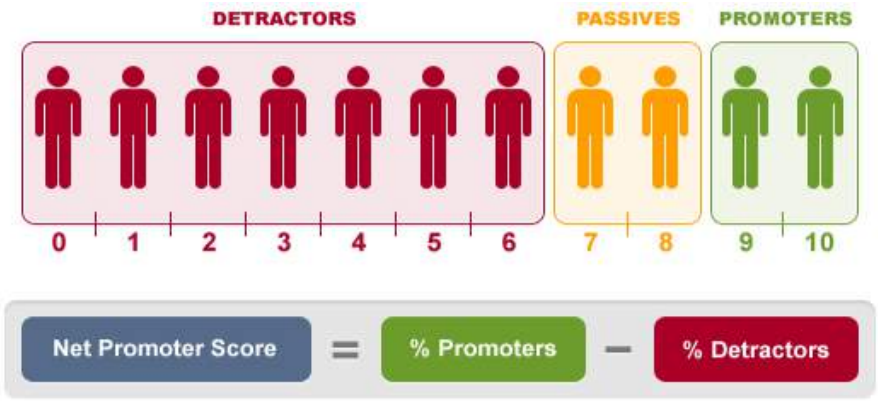
TransPro Driving Excellence

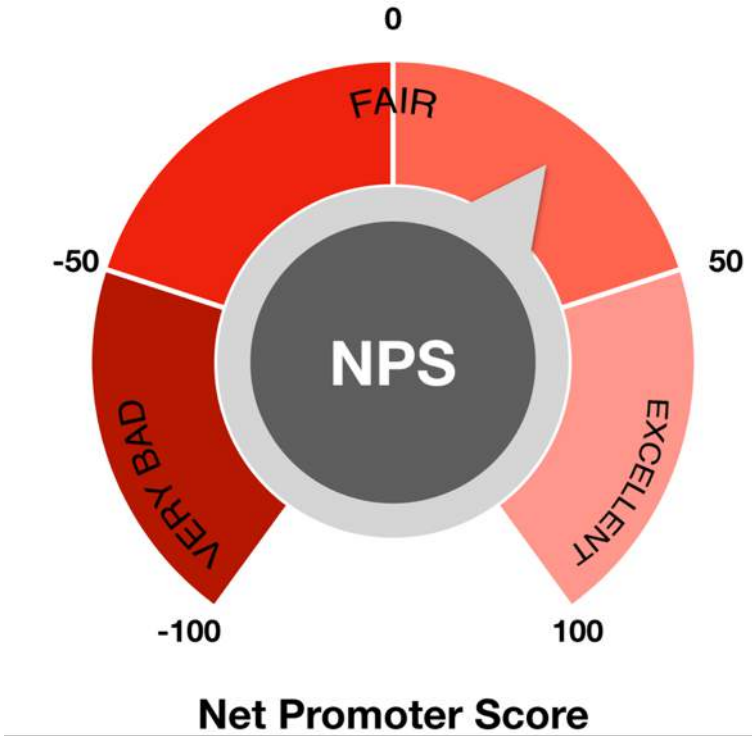
Draft. For discussion only.

Net Promoter Score

NPS poses the ultimate question:

"How likely would you be to recommend riding RTC to a friend or neighbor?"





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NPS: The Metric

Assesses loyalty and word of mouth favorability among customers

Introduced in the Harvard Business Review

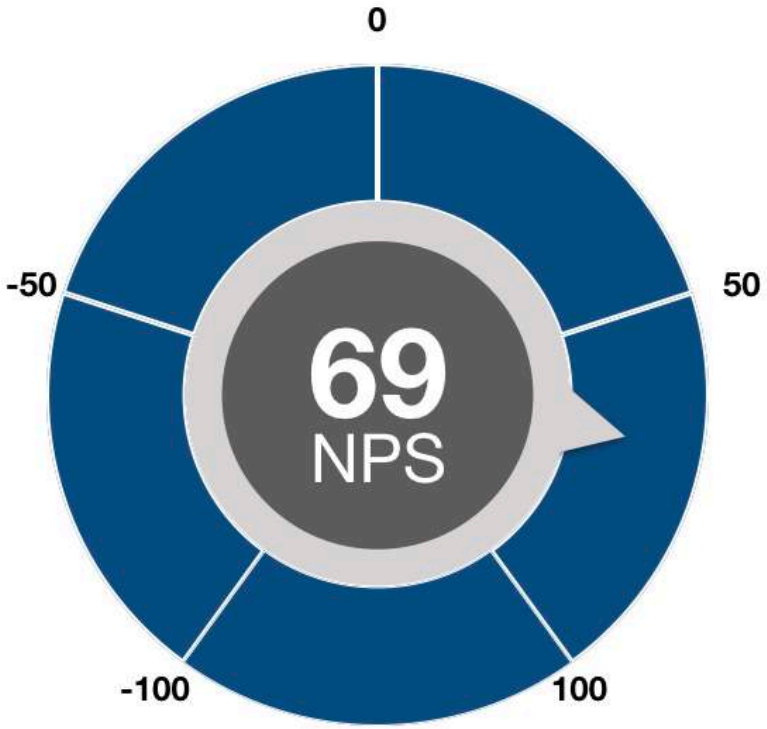
Allows for performance comparisons between organizations across different business sectors

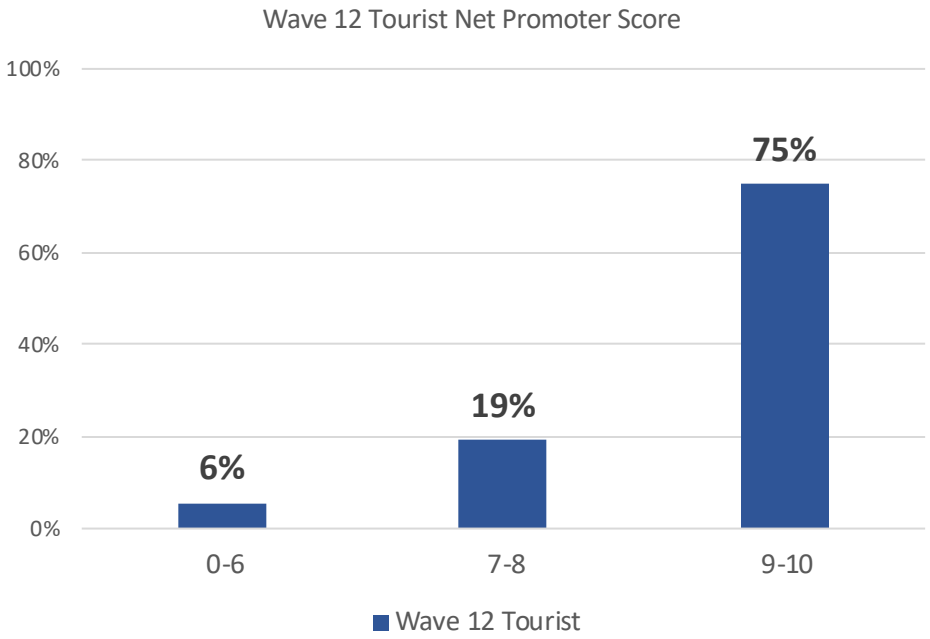


Organization	NPS
Costco	79%
Transit Agencies	32%
Airlines	23%
Car Rental Agencies	18%
Internet Service Providers	5%

NPS: Wave 12 Tourists

Likelihood of recommending RTC





Compared to Industry Sample of 32%

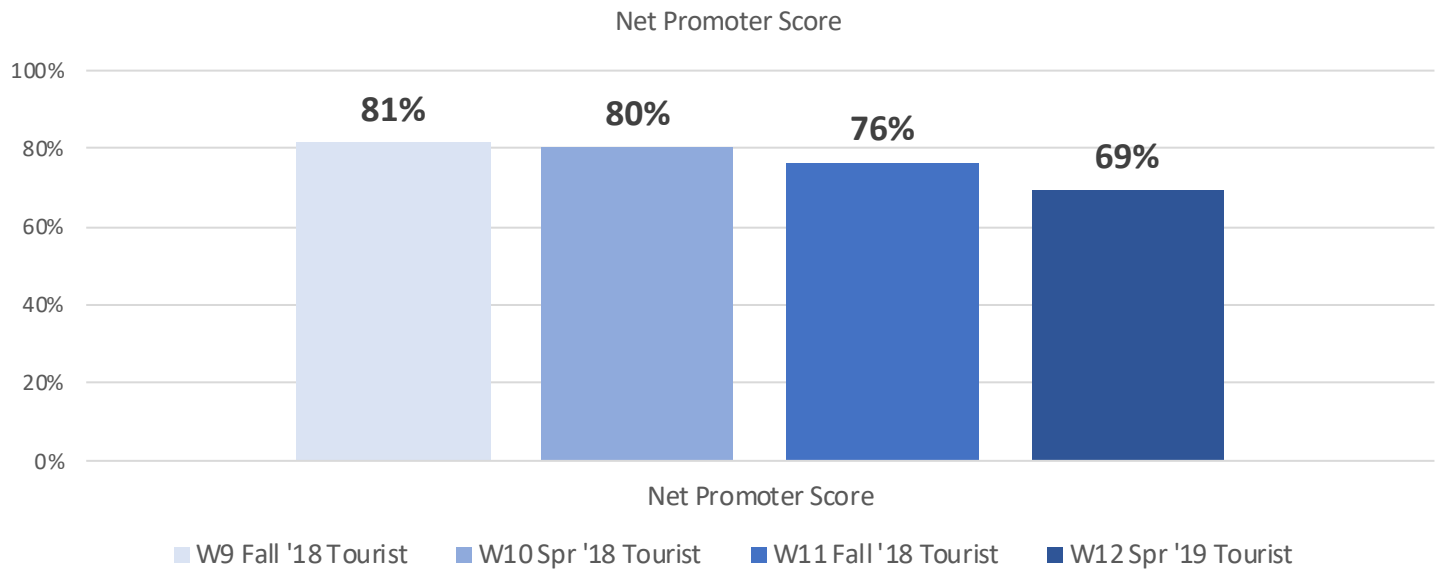
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NPS Comparison by Wave

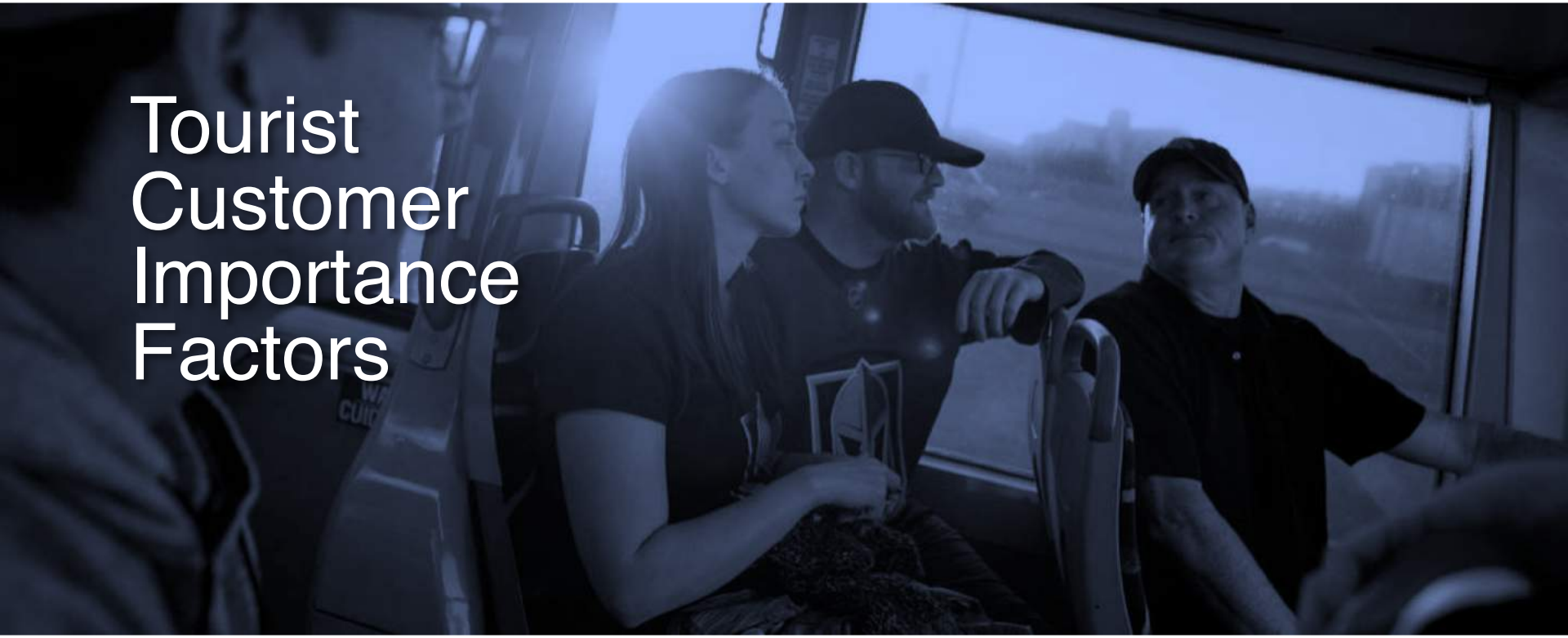
Likelihood of recommending RTC

- Although still very high, RTC's Wave 12 Net Promoter Score among tourists decreased by 9% from Wave 11.



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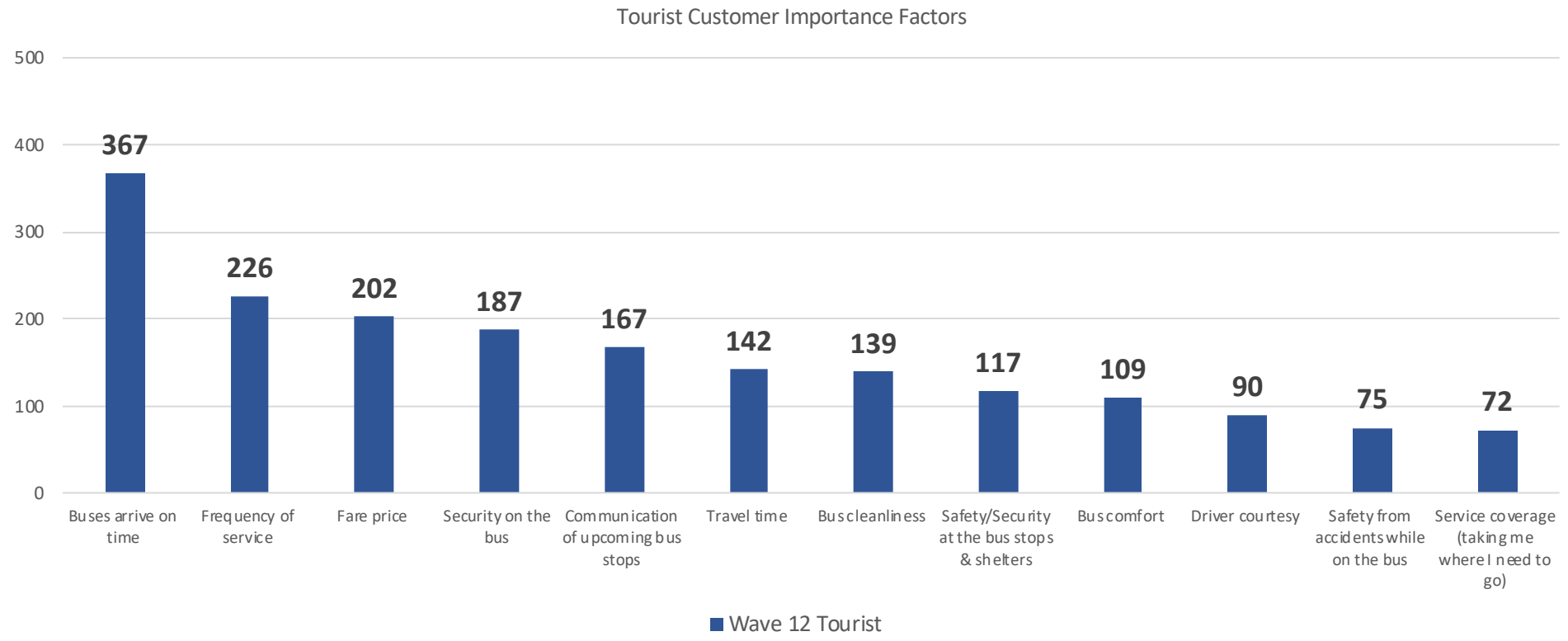
Tourist Customer Importance Factors

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Metric: Top Customer Importance Factors - Tourist

- Buses arriving on time is the most important element of service to tourist customers followed by frequency of service and fare price.



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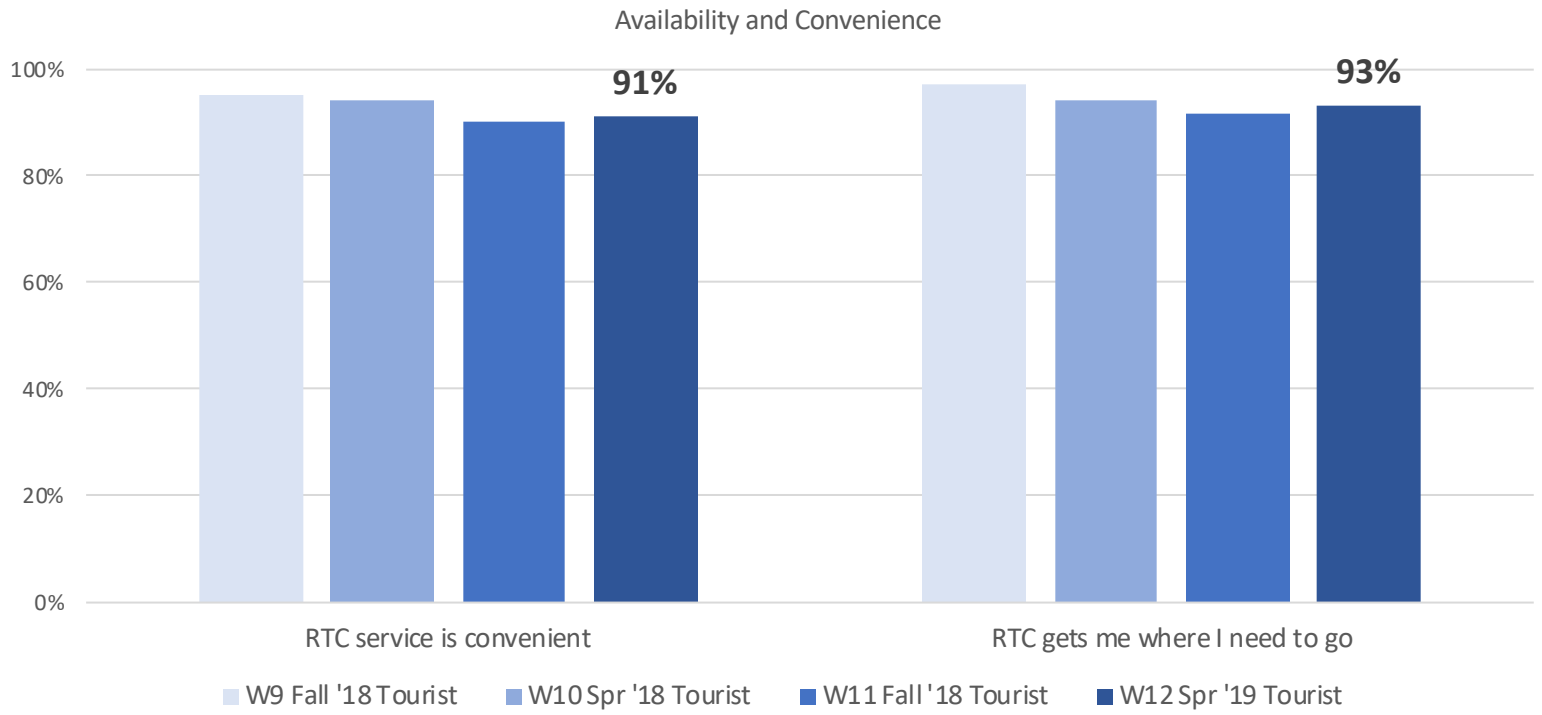
Tourist Customer Impressions & Satisfaction

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Metric: Availability & Convenience

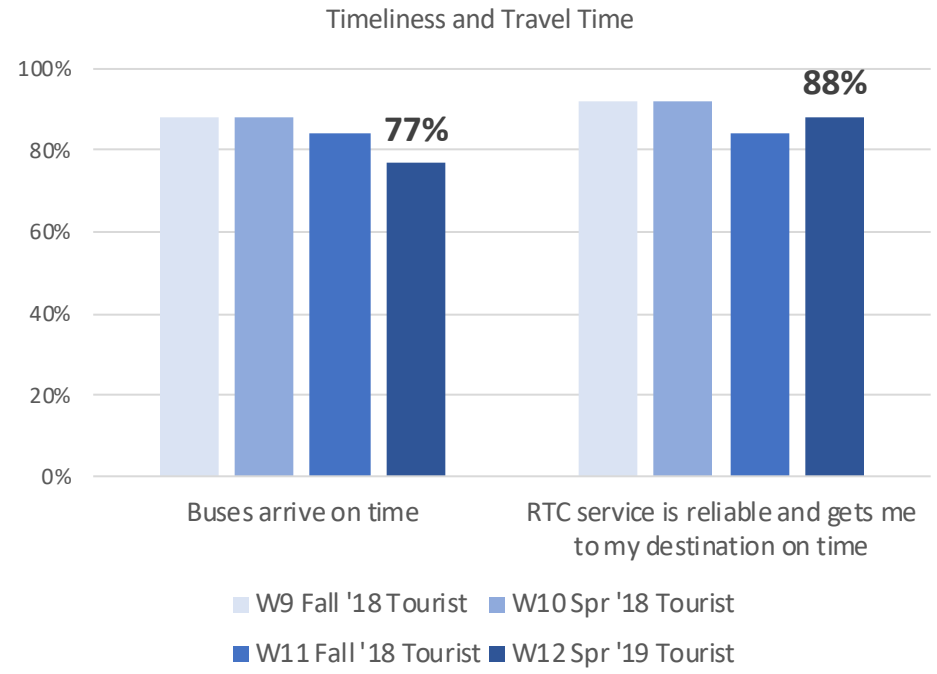
- Satisfaction with service convenience and the ability for RTC to take customers where they need to go increased slightly in Wave 12.

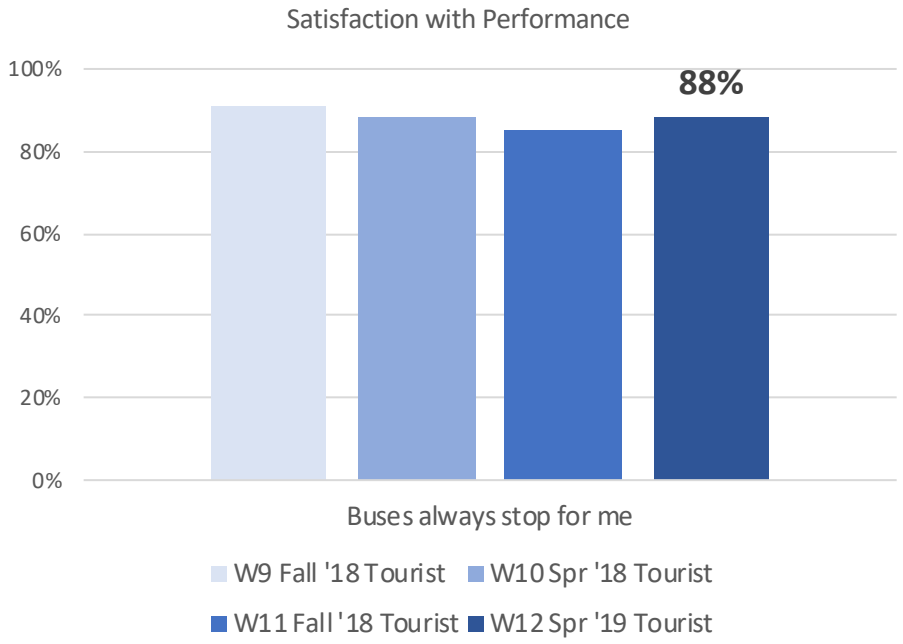


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Metric: Timeliness & Travel Time

- Customers' satisfaction with the bus arriving on time decreased by 8% from Wave 11.
- However, customers' impression of RTC's service reliability increased 4% compared to Wave 11.

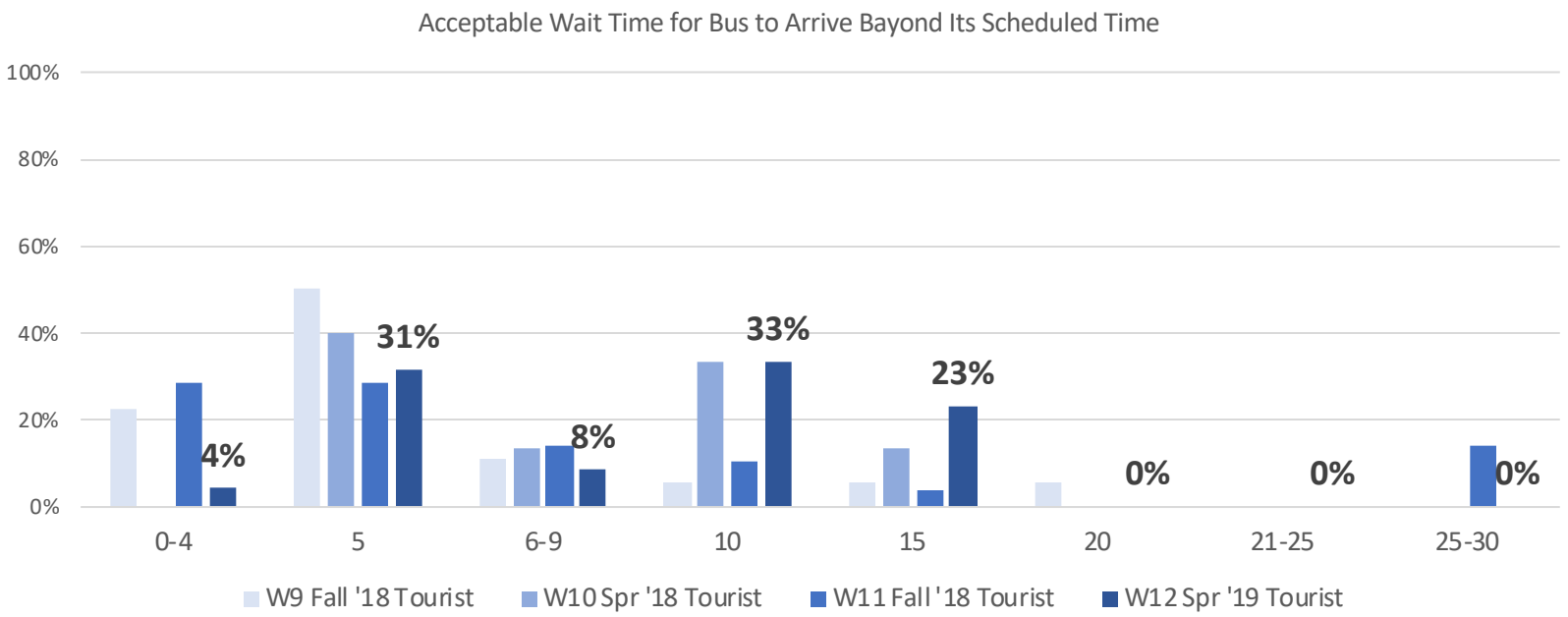




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Metric: Acceptable Wait Times

- 35% of customers in Wave 12 believe a bus should arrive 5 minutes or less beyond its scheduled time, a 40% decrease from Wave 11 (58%).



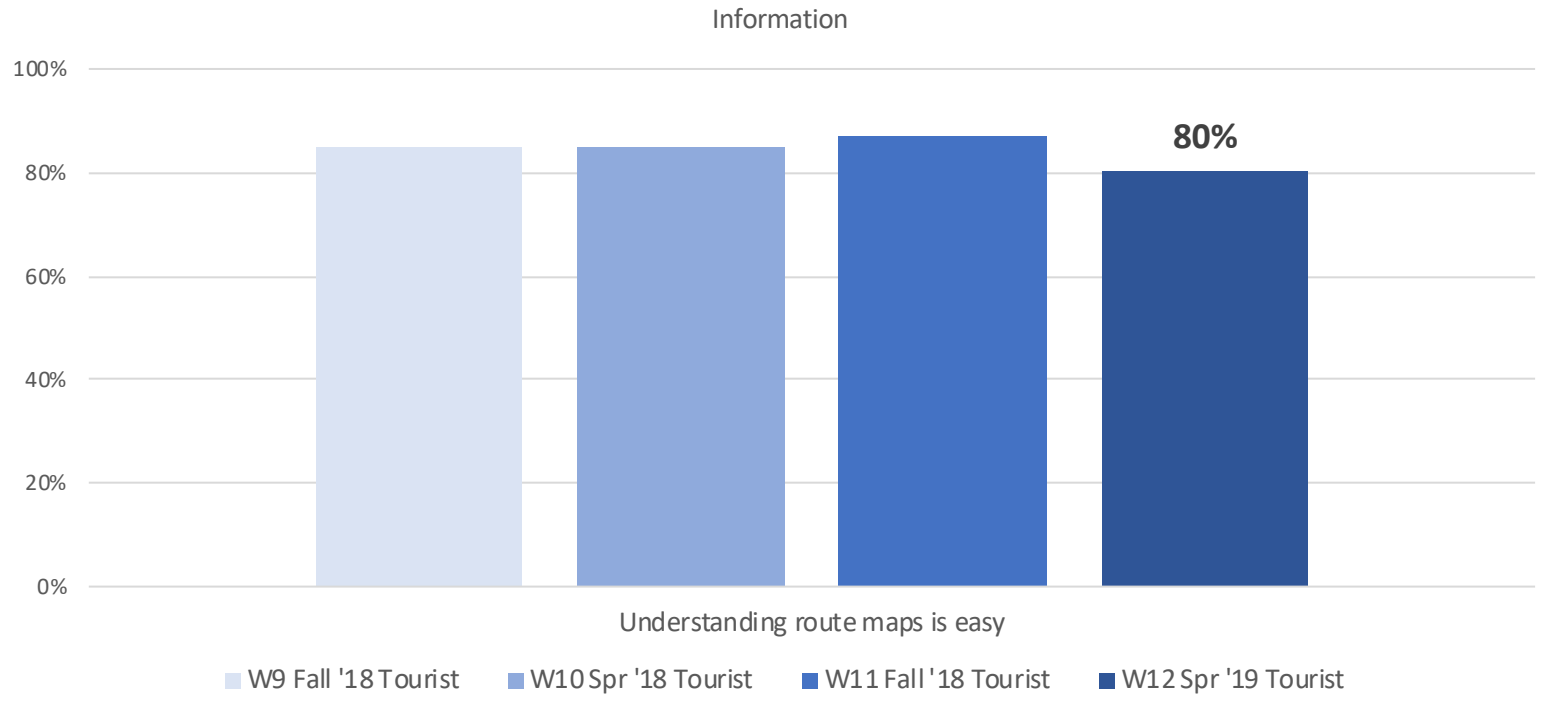
Question: How many minutes do you feel is acceptable for a bus to arrive beyond its scheduled time?

Note: Question is asked only if response to "Buses arrive on time" was not Strongly Agree or Agree.
Wave 11 and 12 responses include ranges.

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Metric: Information

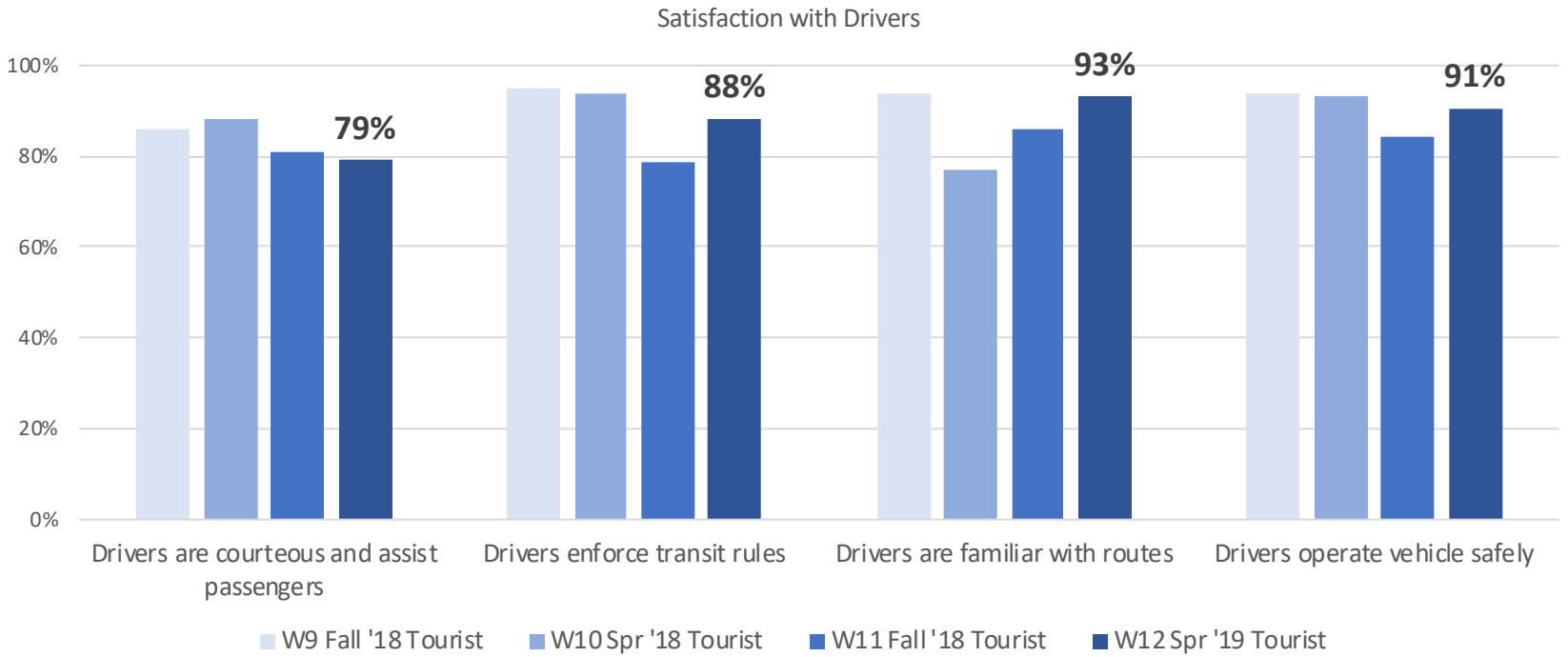
- Tourist customers continue to feel that understanding route maps is easy.



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Metric: Riding the Bus & Bus Driver Customer Service

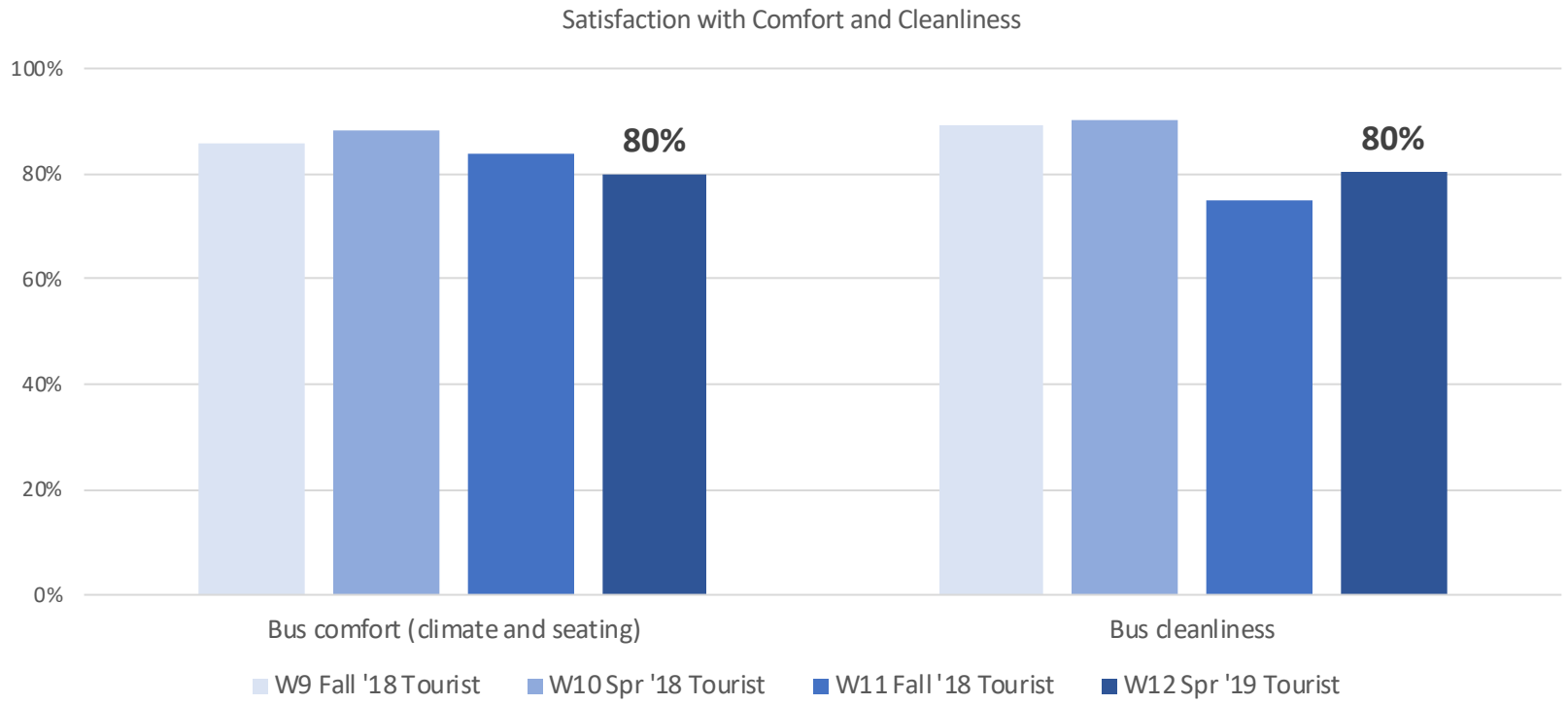
- While customer satisfaction with drivers enforcing transit rules increased 11% from Wave 11, satisfaction with drivers being courteous and assisting passengers continued a downward trend, decreasing 10% from Wave 10 to Wave 12.
- Customer satisfaction with driver familiarity with routes is continuing an upward trend increasing 21% from Wave 10 (77%) to Wave 12.



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Metric: Comfort & Cleanliness

- Customer satisfaction with bus comfort decreased slightly among tourists in Wave 12, resulting in a 9% decrease from Wave 10.
- Customer impressions with bus cleanliness increased 7% from 75% satisfaction in Wave 11 to 80% in Wave 12.

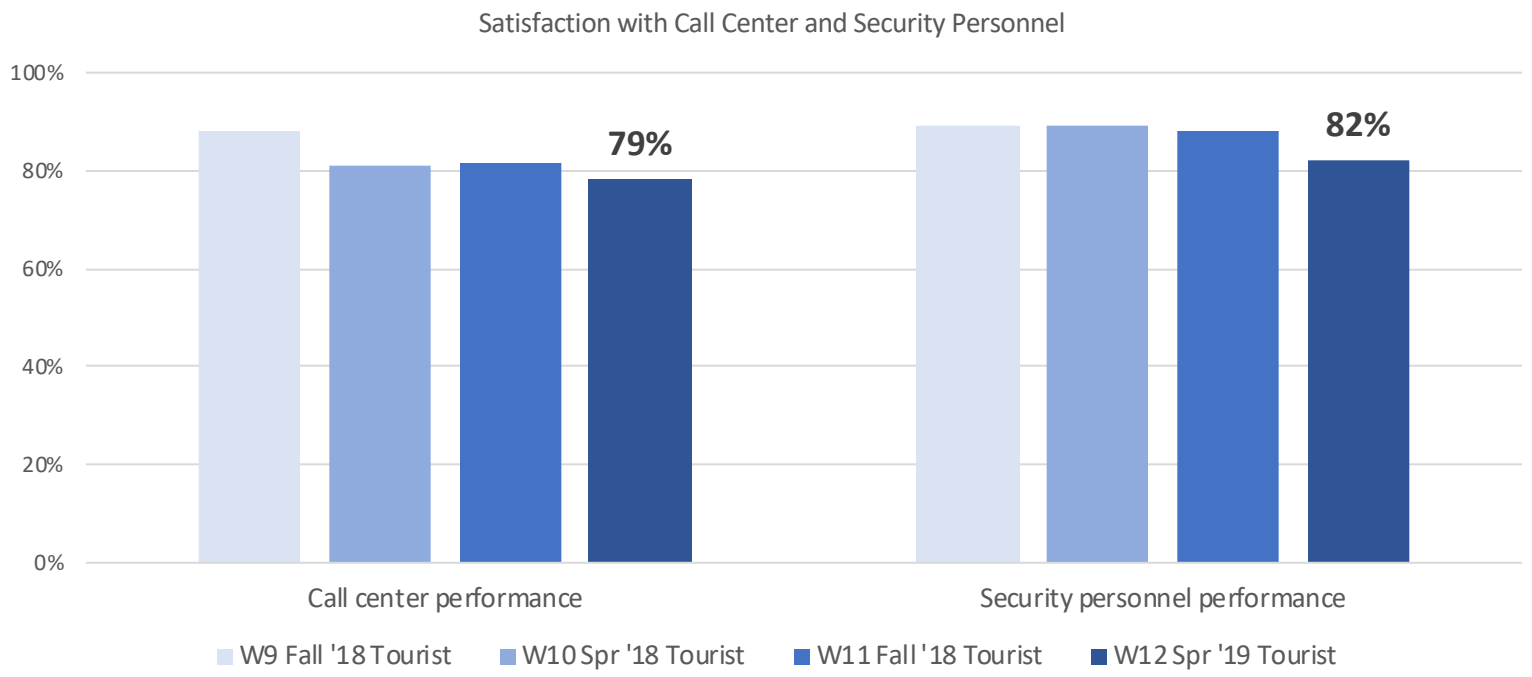


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Metric: Call Center & Security Personnel

- Wave 12 customer satisfaction with call center performance has decreased 10% from Wave 9 (88%) to Wave 12.



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Metric: Safety & Security

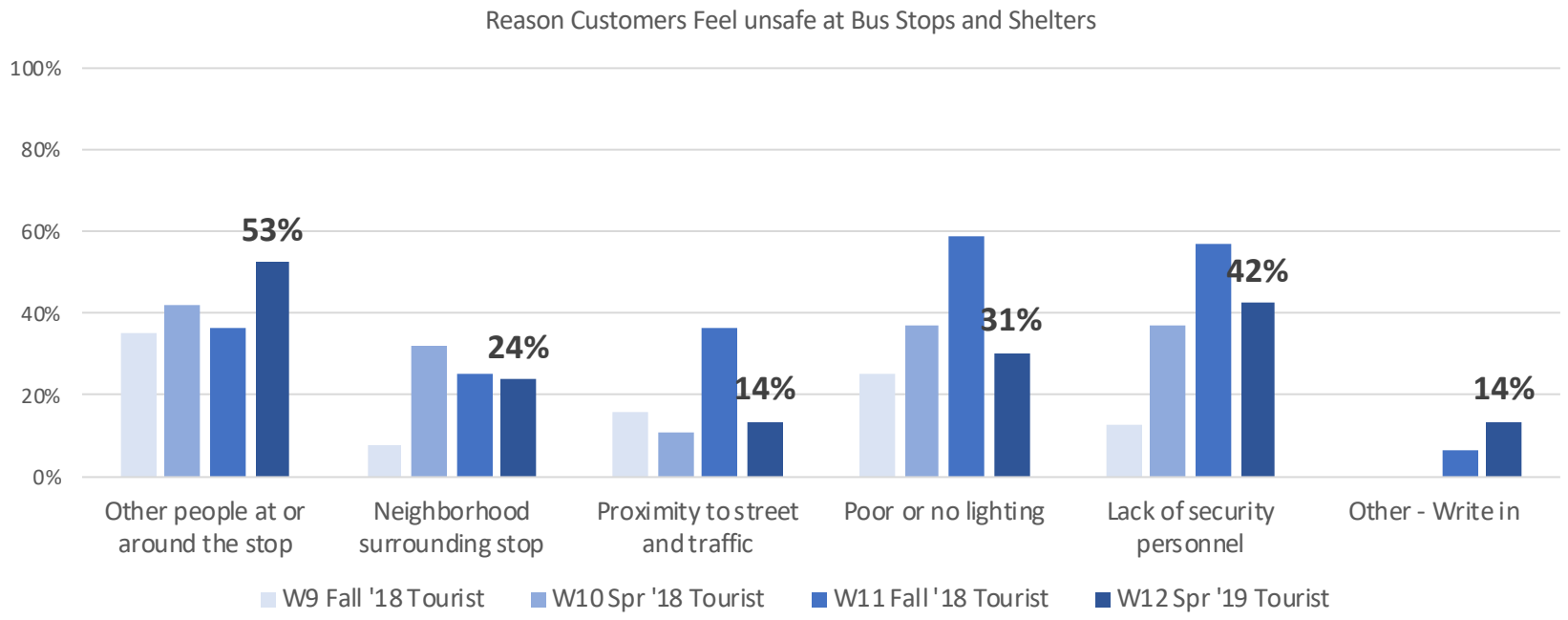
- Customer satisfaction feeling safe and secure while standing at stops or shelters continued a downward trend, a decrease of 16% from Wave 10 (85%) to Wave 12.
- Satisfaction with accidents while riding the bus increased by 25% from Wave 11 to Wave 12.
- Customer satisfaction with the safety of RTC service continued a slight downward trend, with a decrease of 9% from Wave 10 to Wave 12.



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Metric: Safety & Security at Bus Stops and Shelters

- Customers indicate the most common reasons they do not feel safe and secure at bus stops and shelters are other people at or around the stop and a lack of security personnel.
- Other people at or around the stop as a factor increased 47%.

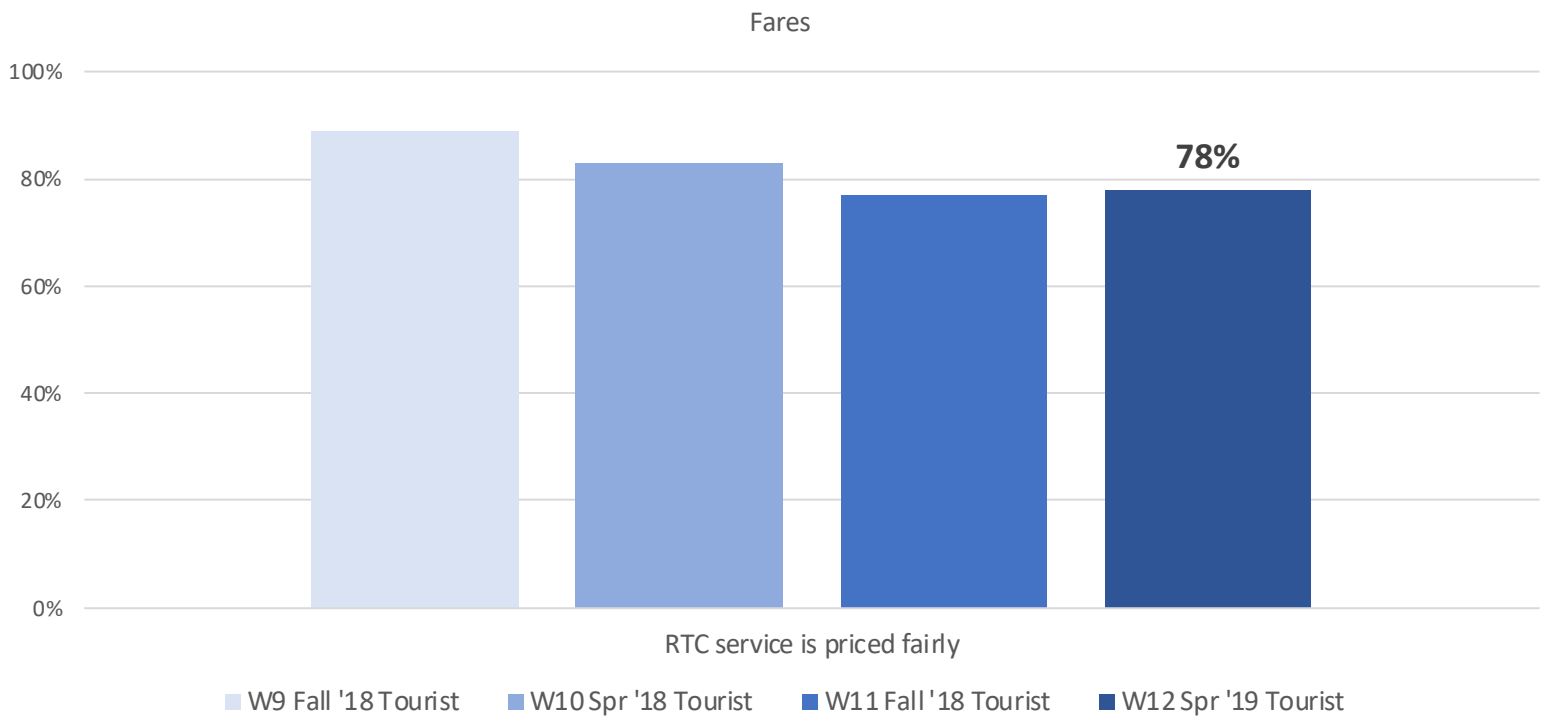


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Metric: Fares

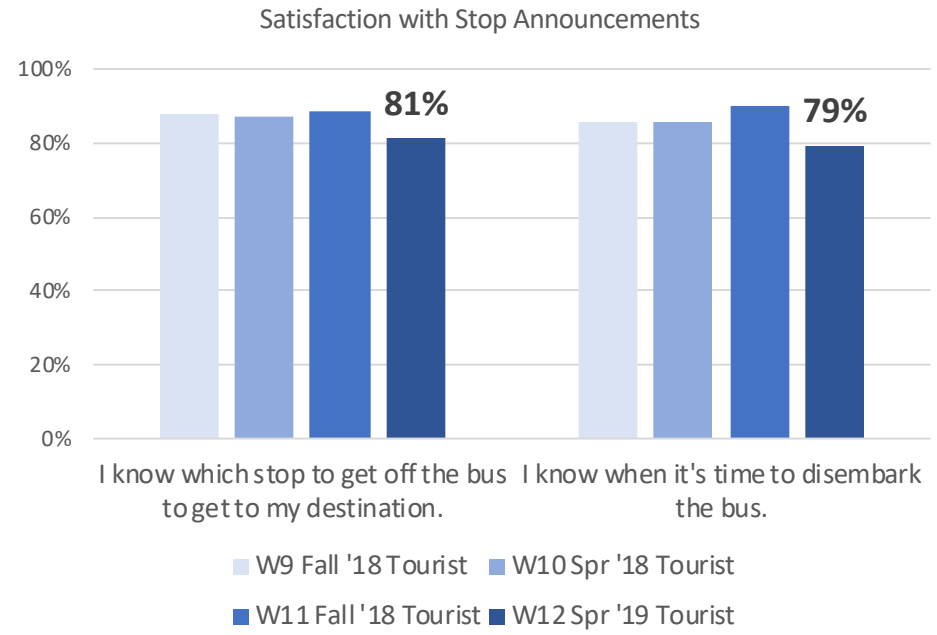
- 78% of customers are satisfied with the cost of fares in Wave 12, continuing a downward trend from Wave 9, a 12% decrease.

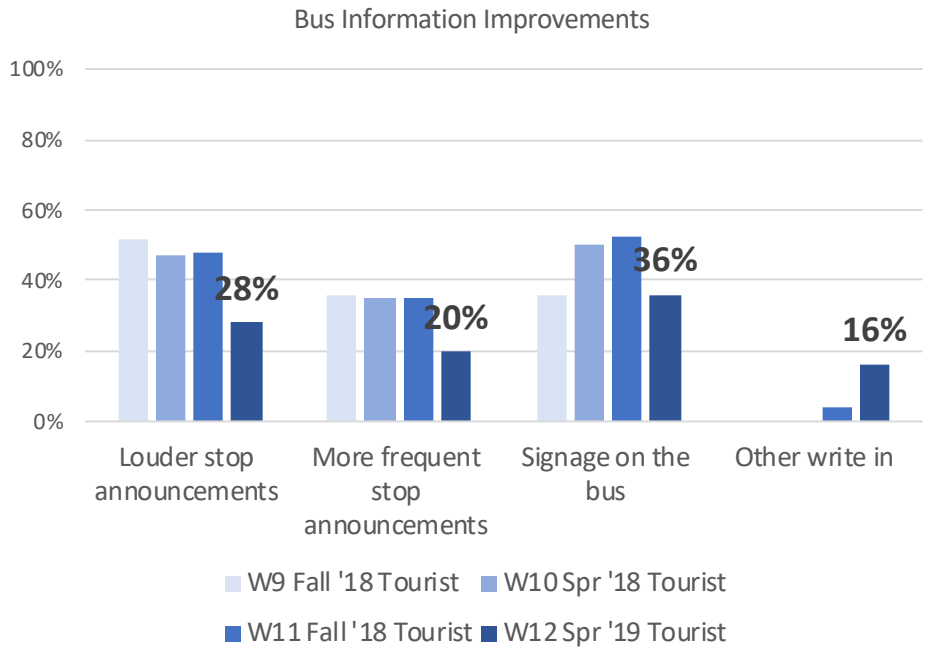


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Metric: Bus Stop Announcements

- Customers are 12% less satisfied with knowing when it's time to get off the bus in Wave 12 than Wave 11.
- Customers continue to believe signage on the bus and louder stop announcements are the best way to improve satisfaction of stop announcements.

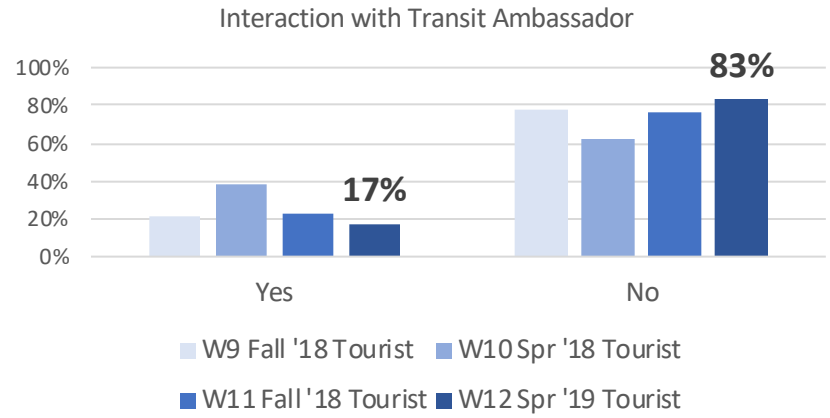


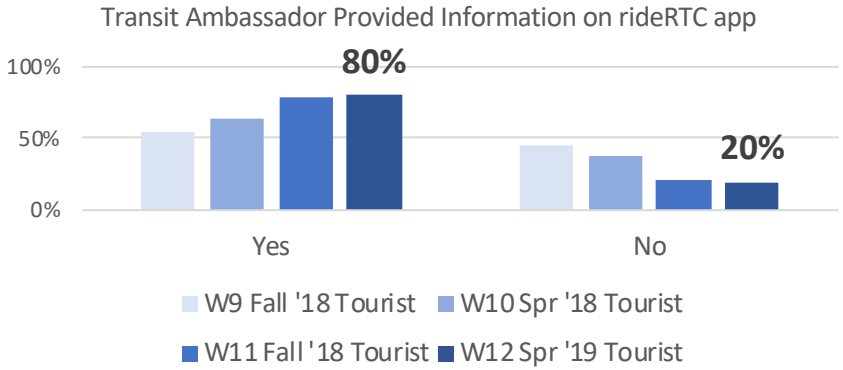


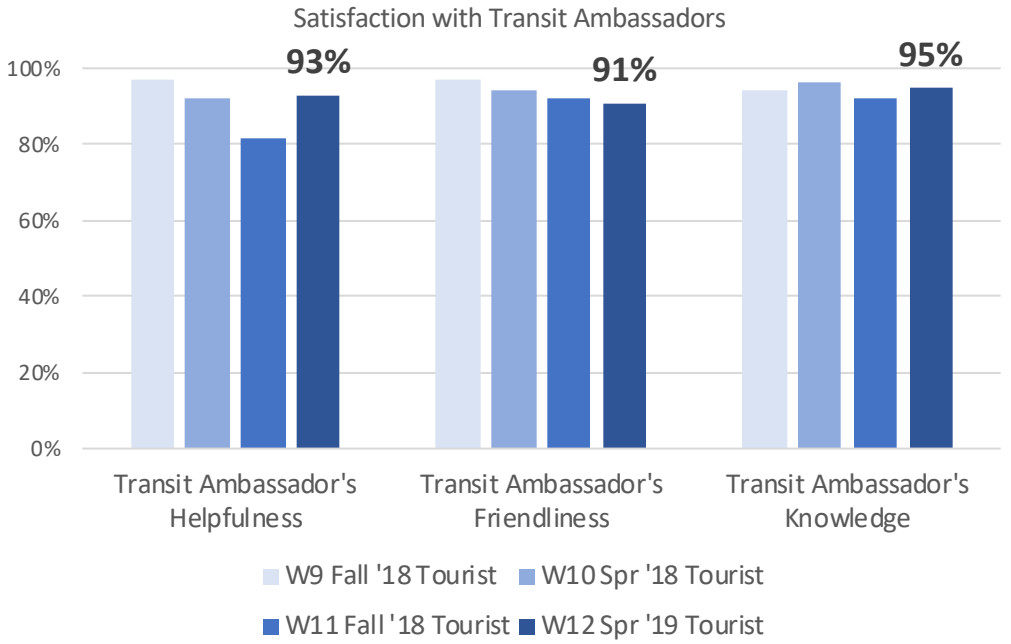
Note: Question asked of respondents who answered 6 or less to the previous two statements.

Metric: Transit Ambassadors

- 17% of customers interacted with a transit ambassador in Wave 12, a 25% decrease from Wave 11.
- Customers are still very satisfied with transit ambassadors' friendliness and knowledge, and satisfaction with their helpfulness increased back to prior wave satisfaction levels.







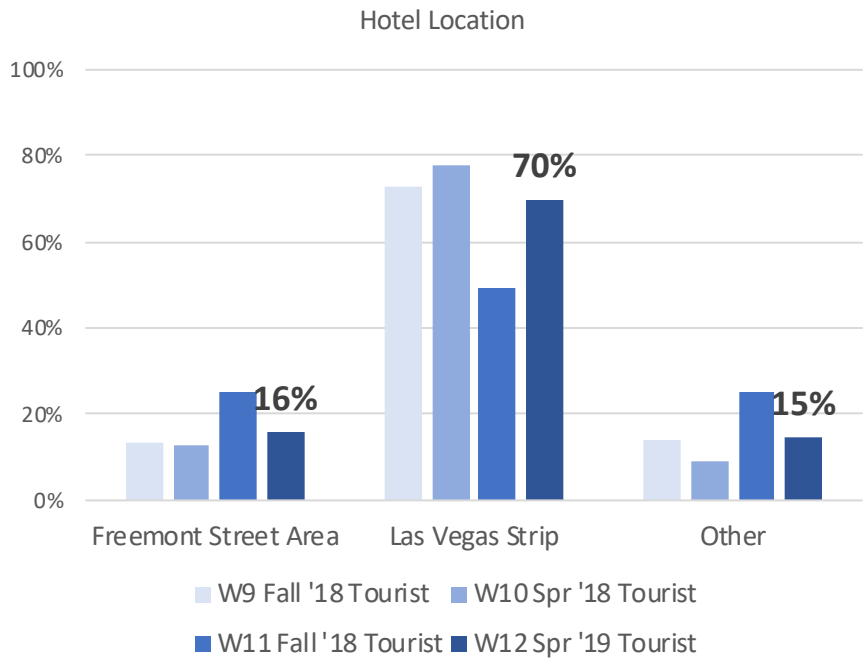
Note: Question asked of respondents who answered Yes to the previous question.

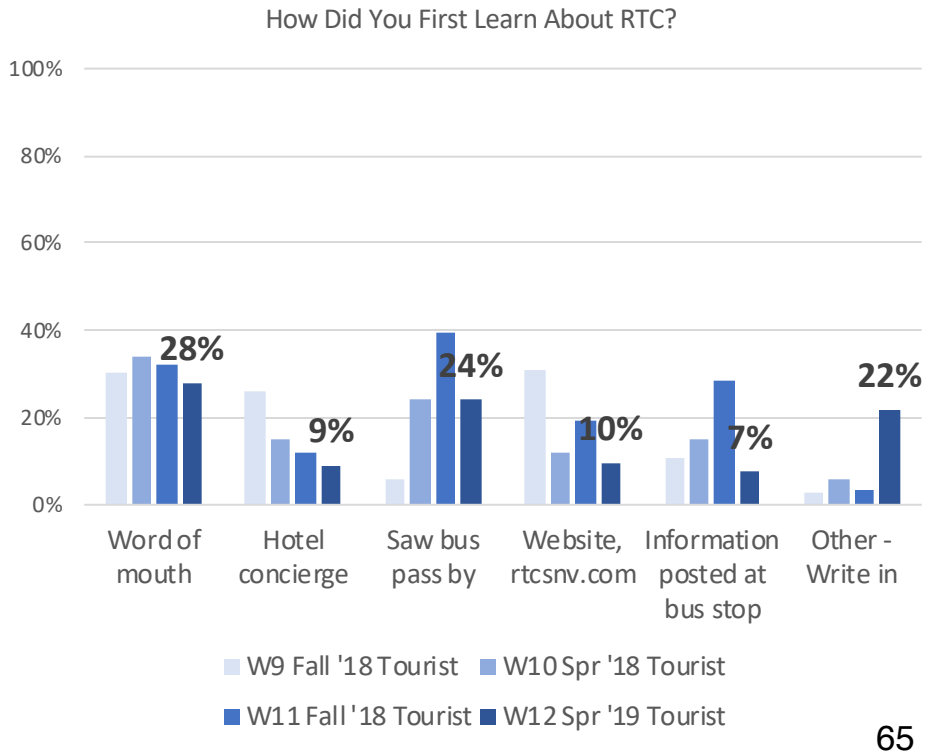
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Metric: Tourist Insights

- Customers indicating their hotel is on the strip increased 40% from Wave 11 to Wave 12.
- 28% of customers first learned about RTC by through word of mouth, a decrease of 13% from Wave 11.



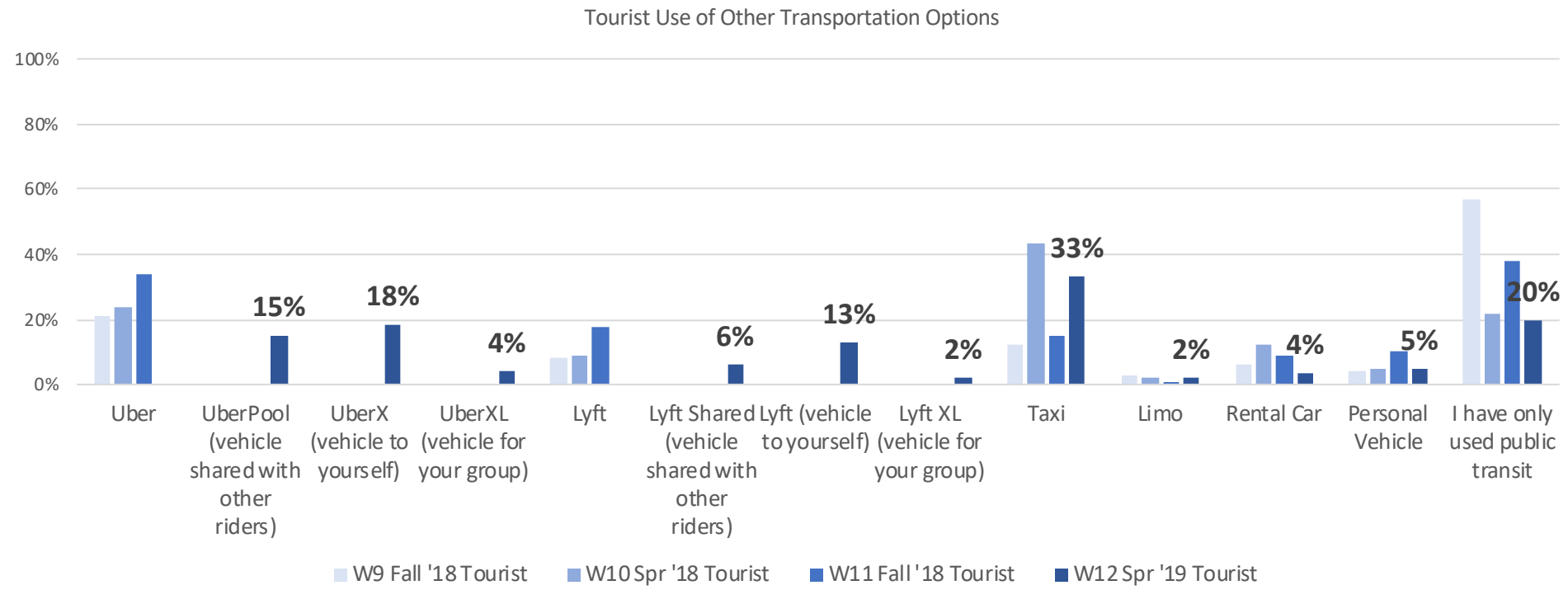


Note: When asked "how did you first learn about RTC, 17% indicated they learned about RTC by walking, which could be attributed to multiple responses.

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Metric: Other Transportation Options

- 37% of customers indicate they use Uber options, 21% use Lyft options and 33% use a taxi as other forms of transportation in Wave 12.
- 21% of customers indicate they used a pool-type service in Wave 12.



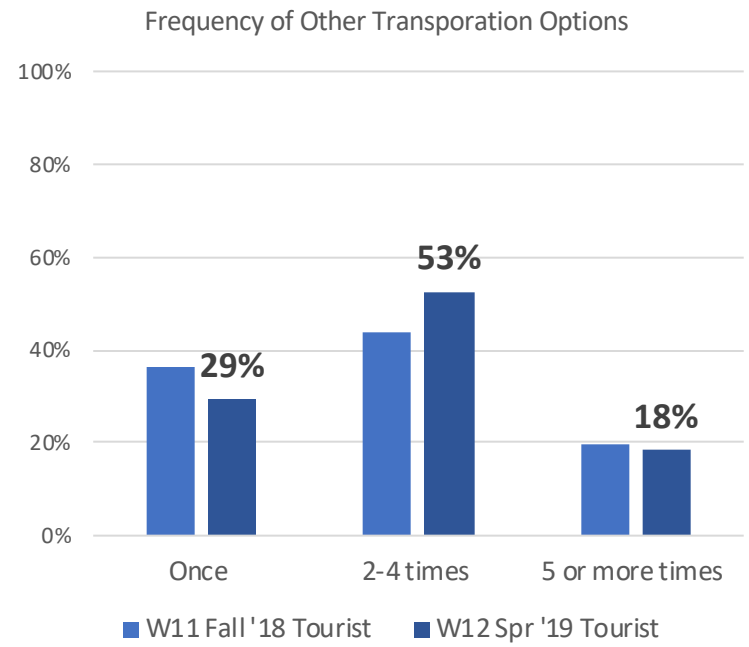
*Additional other transportation option responses added in Wave 12.

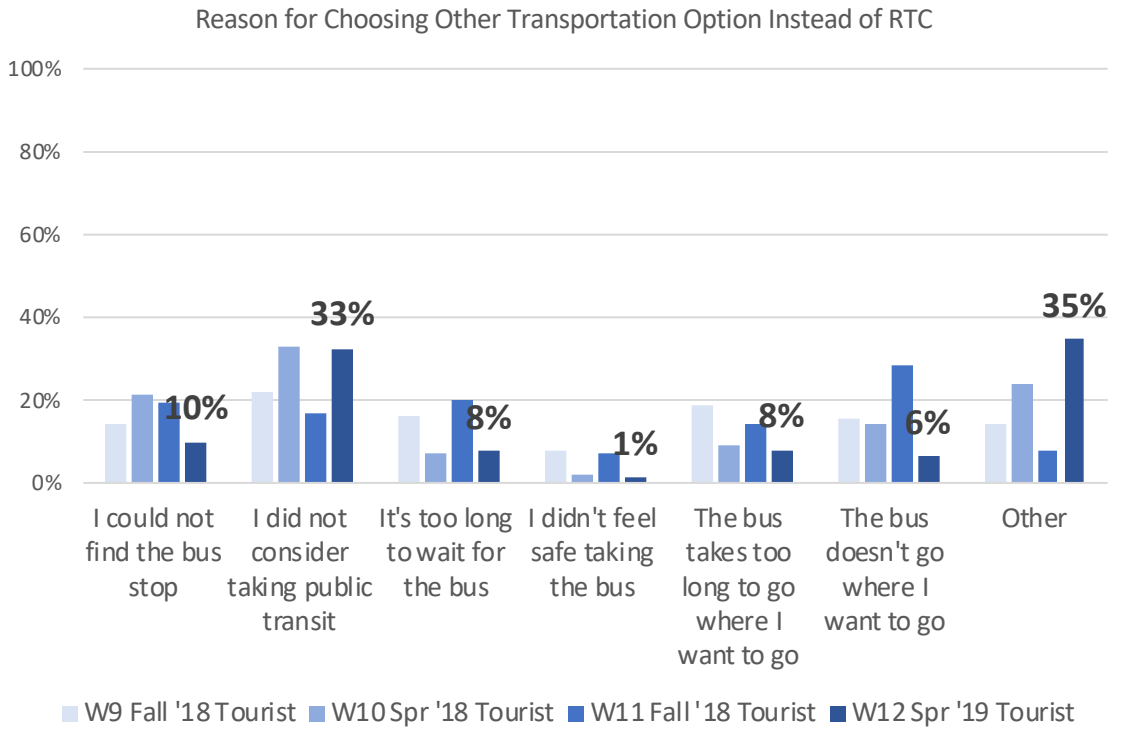
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Metric: Other Transportation Options

- Tourist customers indicated they did not consider taking public transit as the most common reason they chose other transportation options, a 94% increase from Wave 11.
- Other responses include general convenience, fare prices, and other individualized responses.

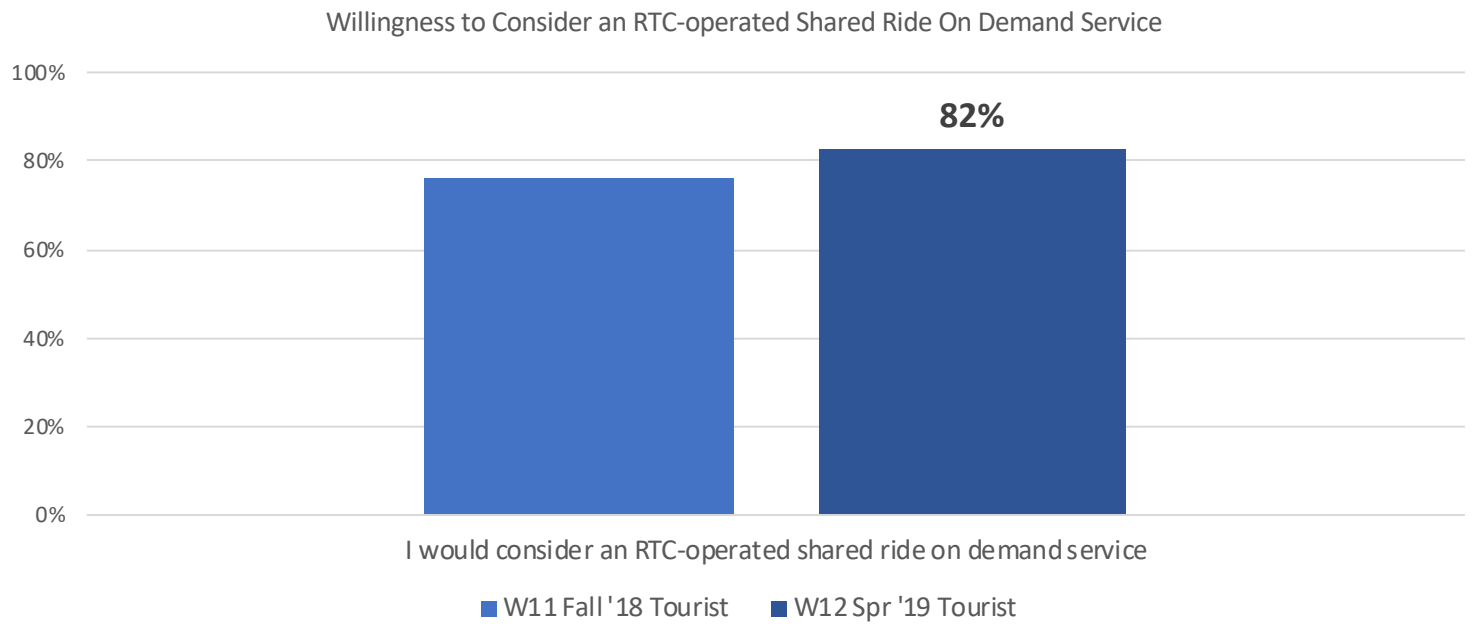




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Metric: Other Transportation Options

- More than 82% of customers indicate they would consider taking an RTC-operated shared-ride on-demand service in Wave 12.



Note: Question introduced in Wave 11.

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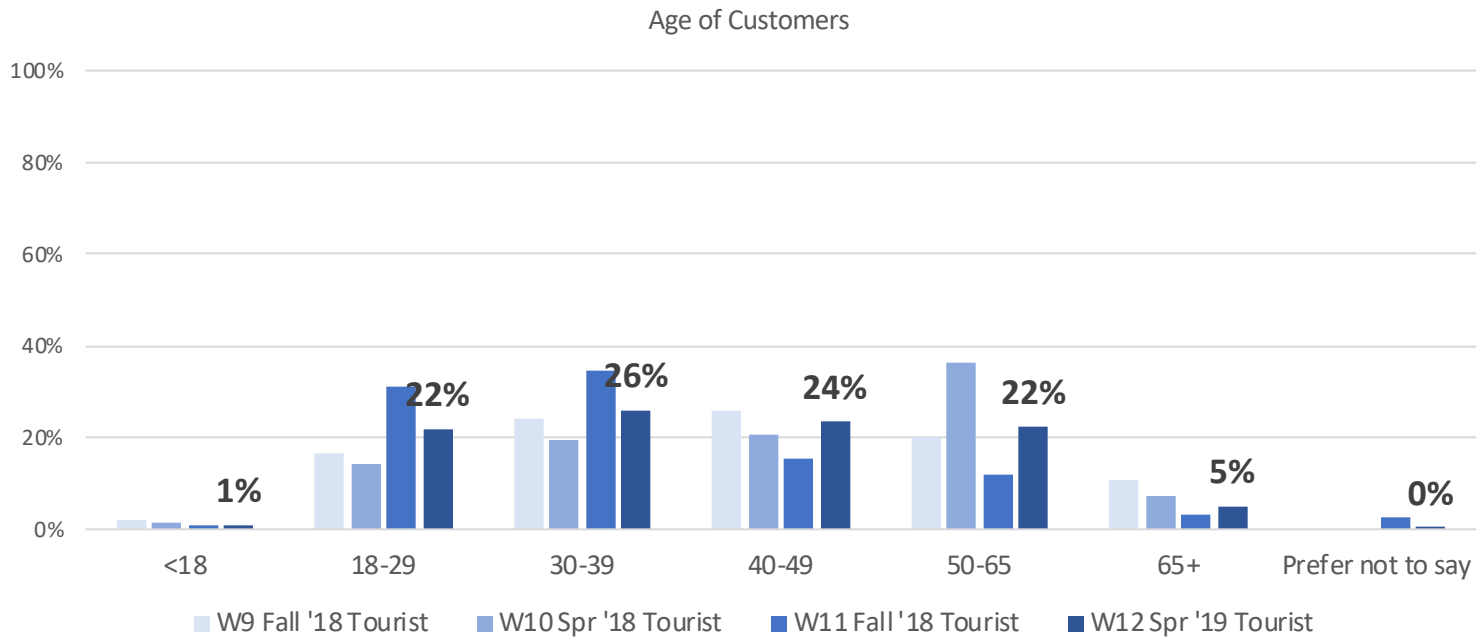
Tourist Customer Characteristics

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Age of Customers

- 48% of customers are between the ages 18-39, a decrease of 26% from Wave 11.
- The percentage of customers between the ages of 50-65 in Wave 12 increased 83% compared to Wave 11.

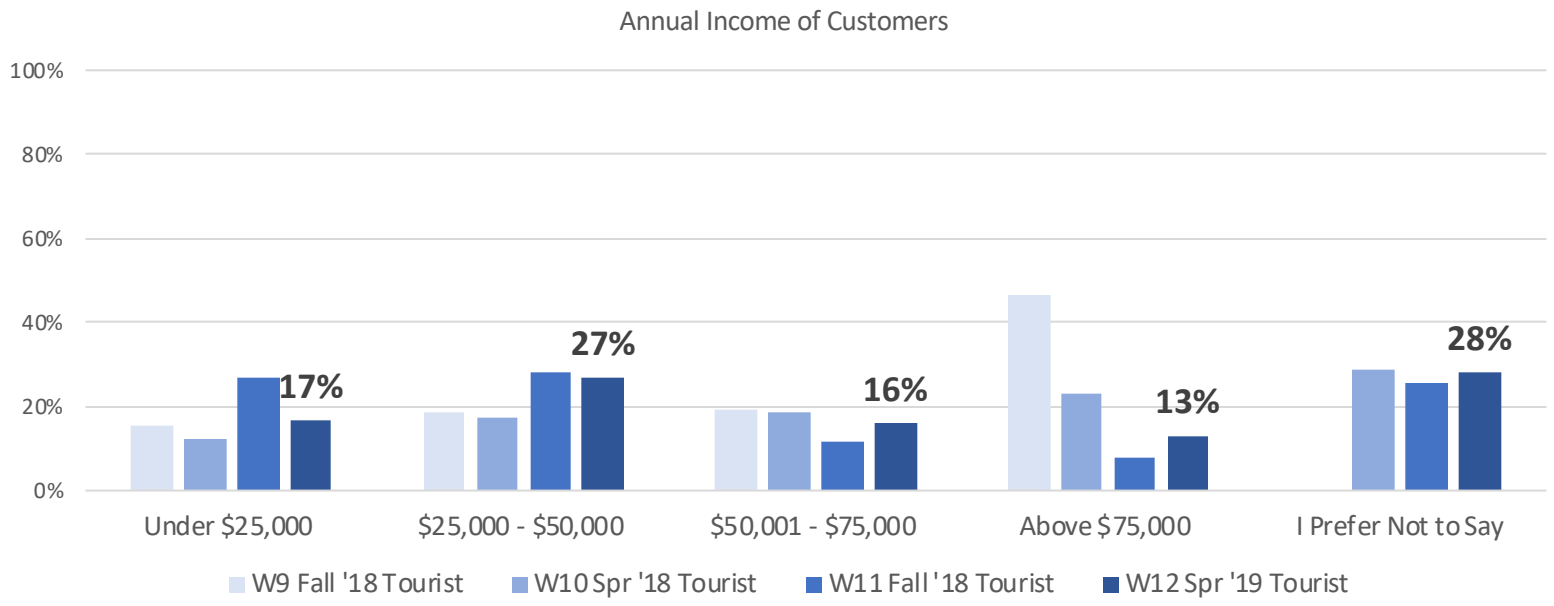


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Income of Customers

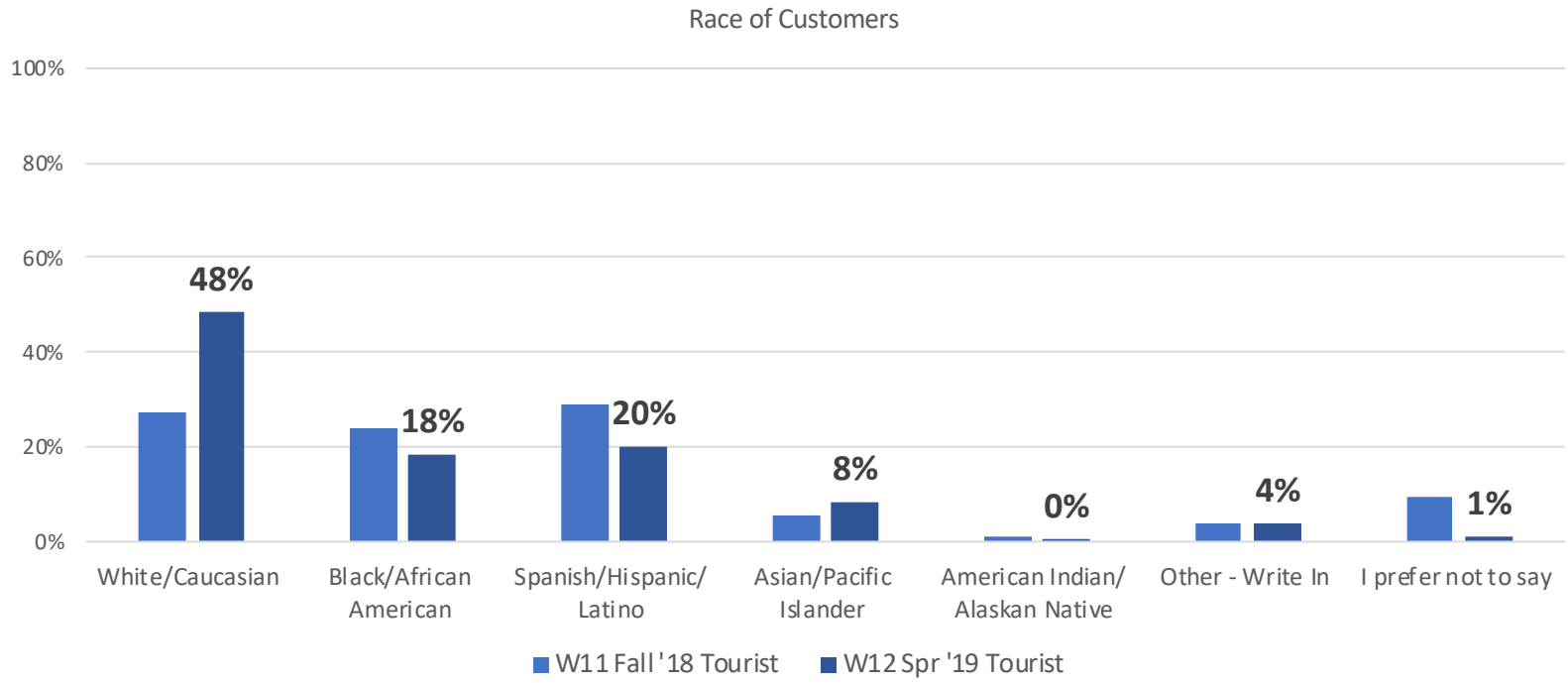
- 55% of customers have an annual income below $50,000, an increase of 57% from Wave 9 to Wave 11.
- Customers with an annual income above $75,000 increased 63% from Wave 11 (8%) and annual income under $25,000 decreased 37% from Wave 11 (27%).



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Race of Customers

- 48% of customers in Wave 12 are White/Caucasian.

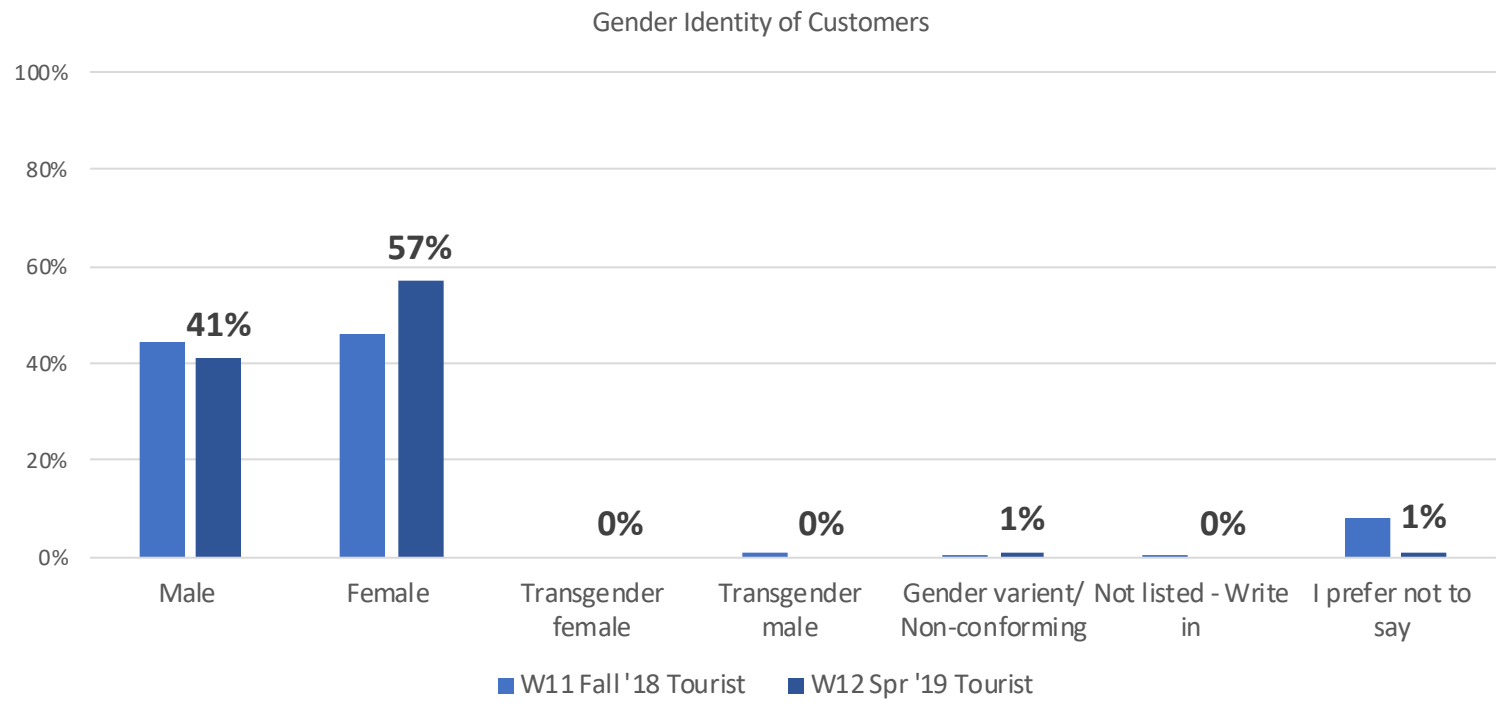


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Gender Identity of Customers

- 57% of customers in Wave 12 are female.

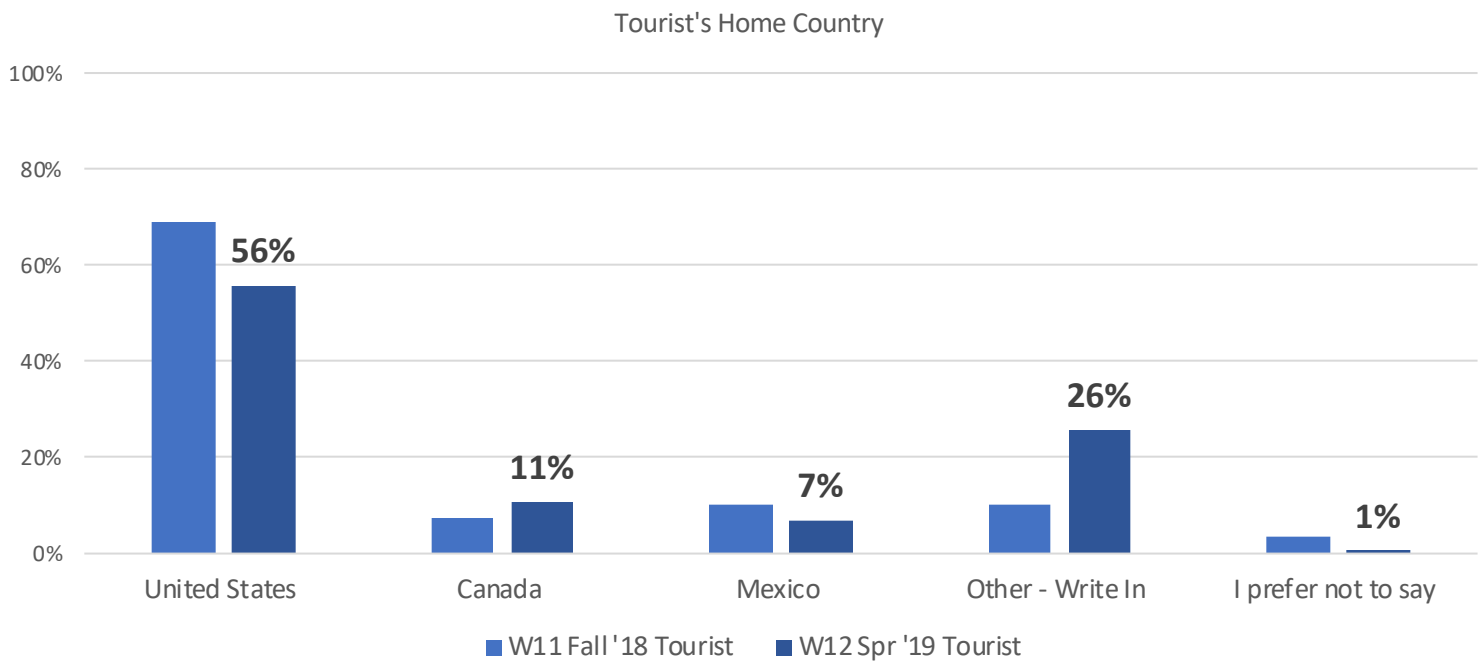


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Home Country of Customers

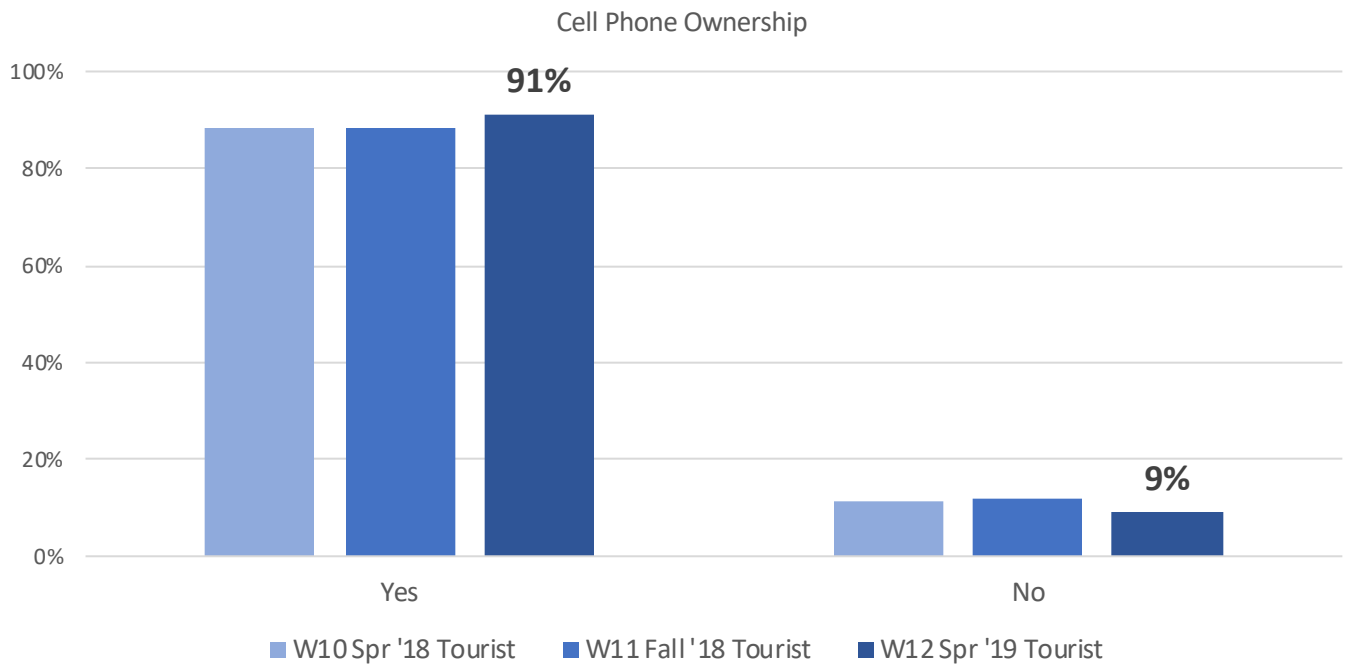
- 56% of customers visited Las Vegas from North America.
- Other tourists traveled from all over the world including countries in South America, Europe, and Asia.



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Cell Phone Ownership

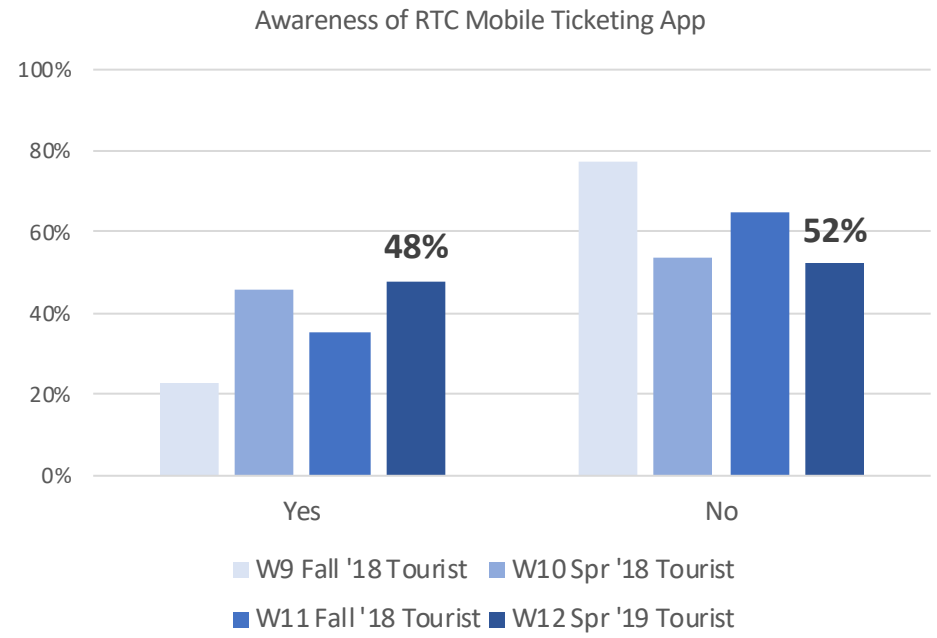
- 91% of customers indicate they own a cell phone, a slight increase from responses from prior waves.

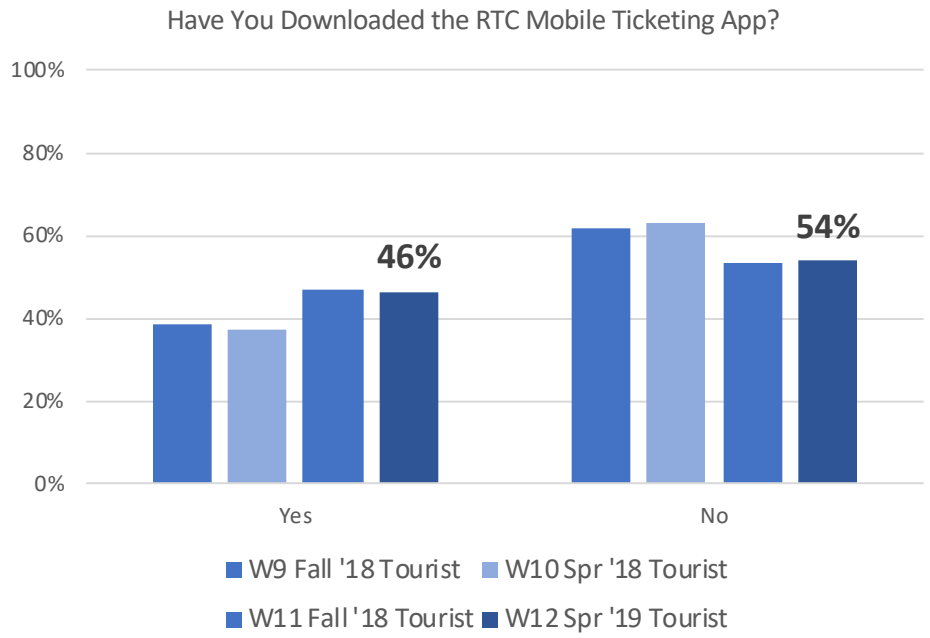


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Mobile Ticketing App

- 48% of customers indicate they are aware of the RTC mobile ticketing app, a 33% increase from Wave 11.
- Of the customers who are aware of the mobile ticketing app, 46% have downloaded the app.

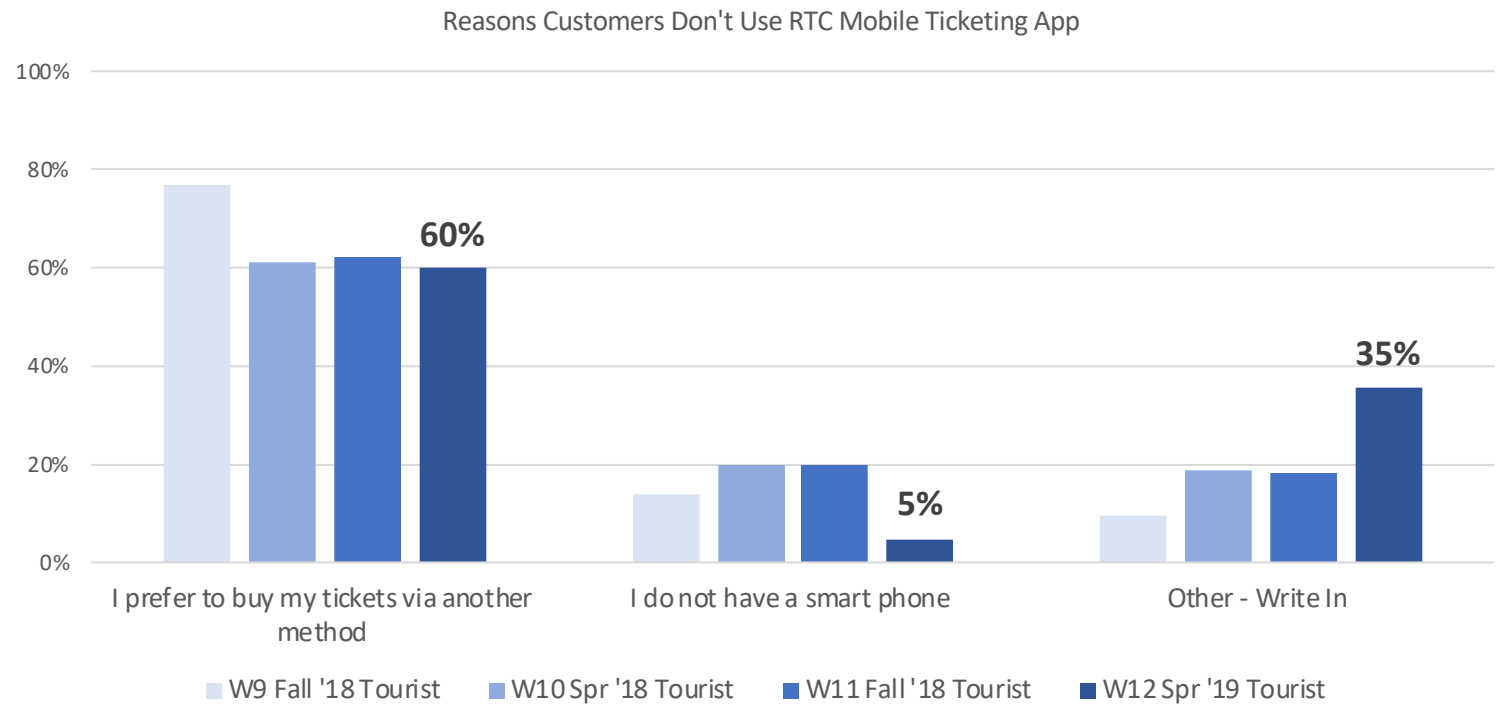




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Mobile Ticketing App

- 60% of Customers' prefer to buy tickets via another method. The common response in the other category was it wasn't necessary or they chose not to download the app.



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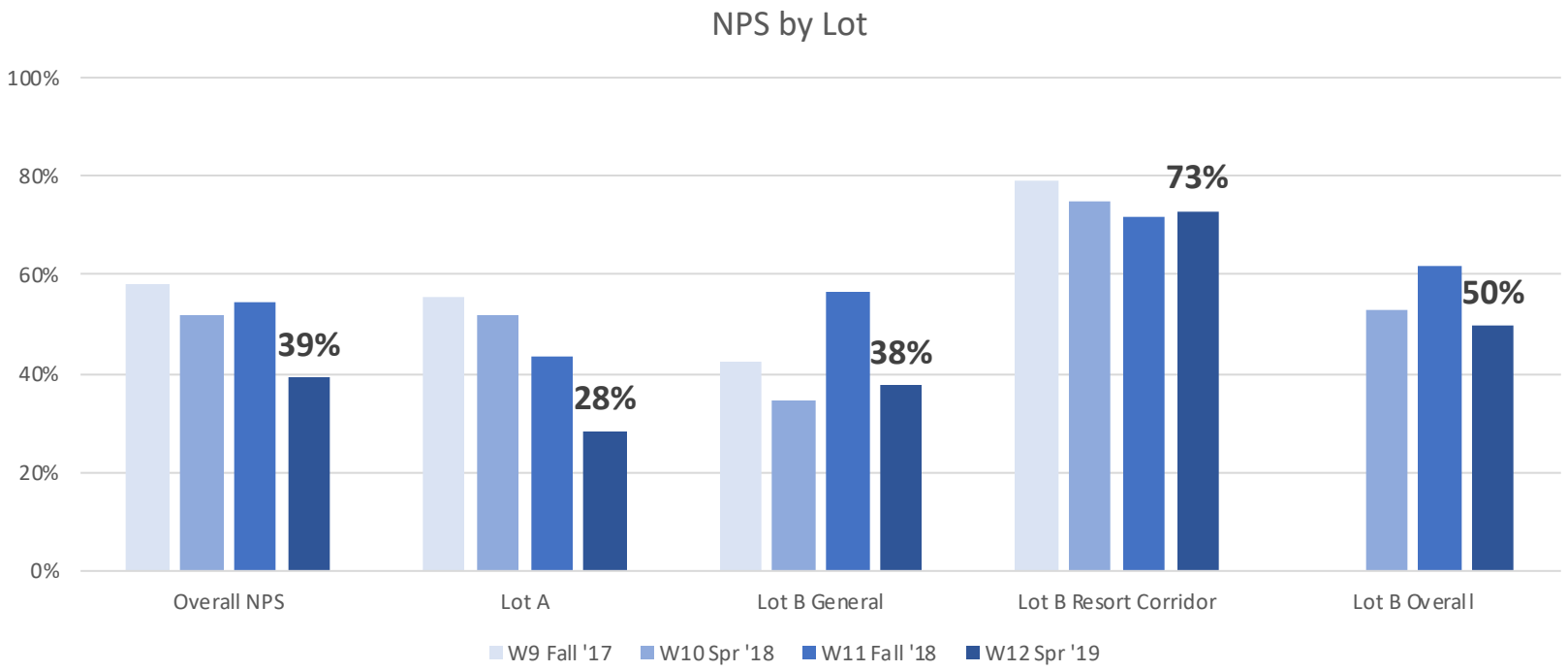
Lot Comparison

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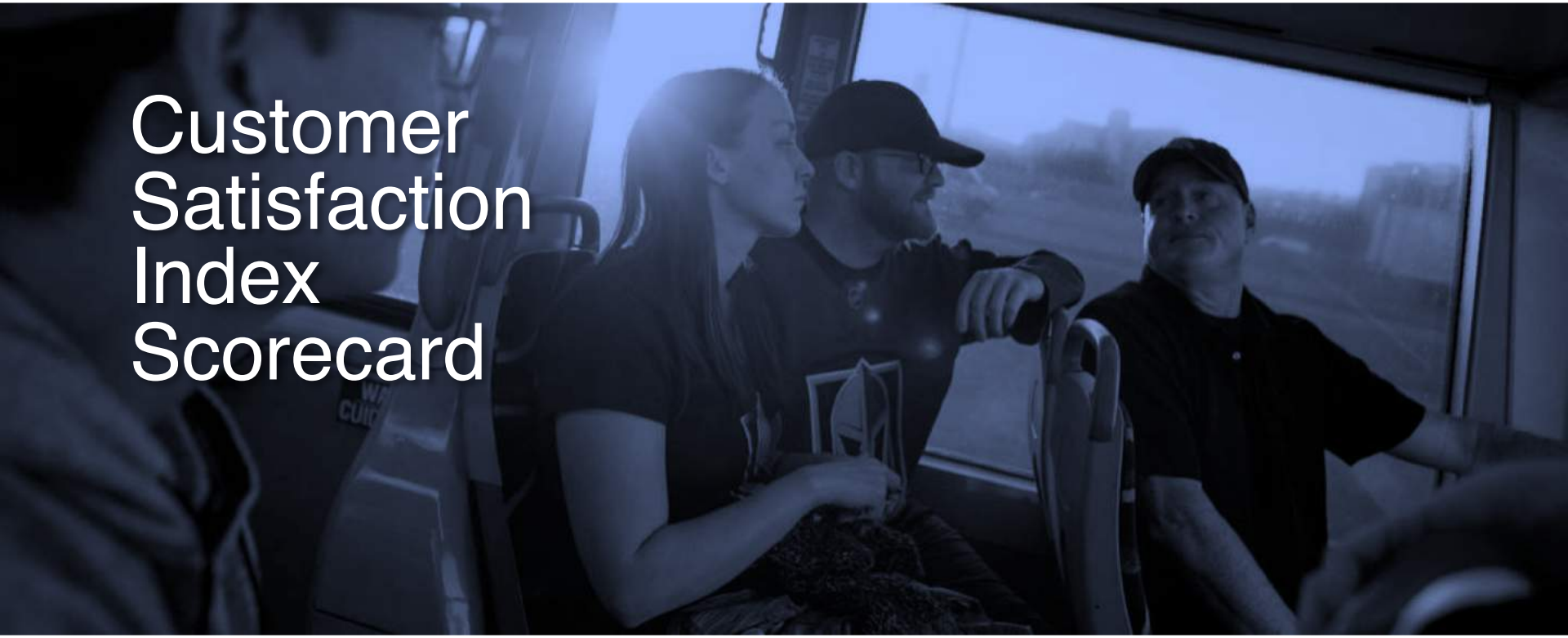
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NPS by Lot

- Lot A continues a downward trend with an overall decrease of 50% from Wave 9 to Wave 12.
- Lot B General's NPS decreased 33%, realigning with previous waves.
- Comparatively, Lot B overall has a 79% higher NPS than Lot A.



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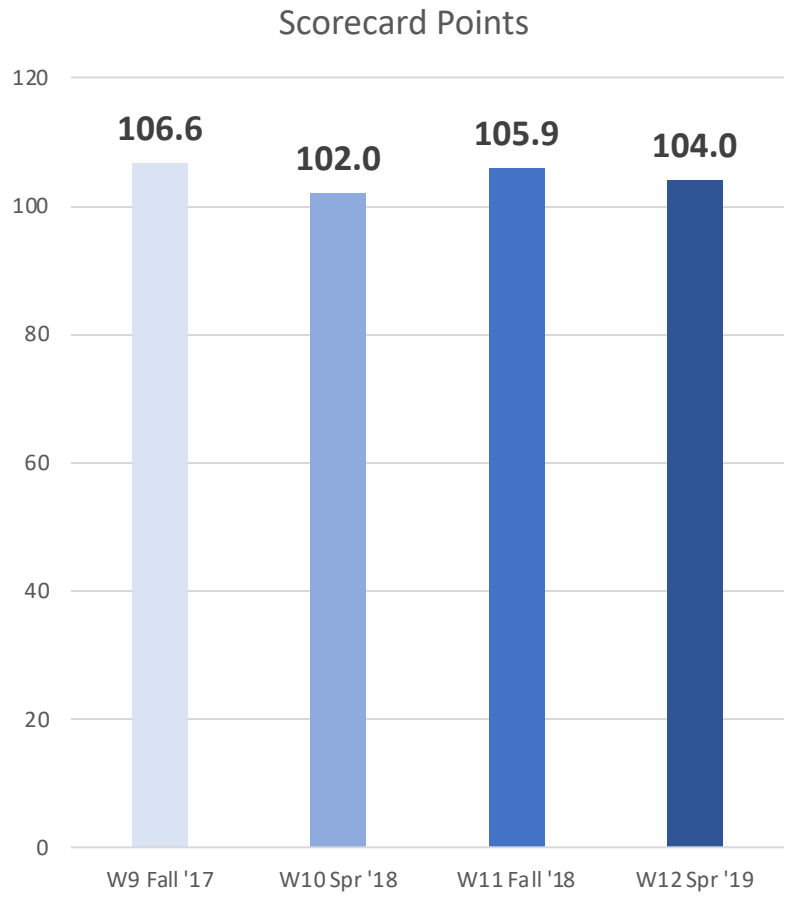


Customer Satisfaction Index Scorecard

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Customer Satisfaction Index Scorecard Points



Metric	Wave 11 Result	Wave 12 Result	Change
NPS	54%	39%	-28%
Bus Comfort	71%	63%	-12%
Bus Driver Customer Service	81%	80%	-1%
Satisfaction with Call Center Interactions	71%	68%	-4%
Early Departures	0.4%	0.5%	20%
On-Time Performance	85.3%	86.0%	0.8%
Mechanical Road Calls	189	215	14%

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Customer Satisfaction Index

SCORECARD

Metric	Performance Goal	Wave 9 Sept. 17	Wave 10 April 18	Wave 11 Nov 18	Wave 12 May 19	Goal Points	Wave 12 Earned Points
Net Promoter Score	30%	58%	51%	54%	39%	25	32.5
On-Time Performance	90%	85.8%	88.6%	85.3%	86.0%	16	15.3
Early Departures	1%	0.5%	0.4%	0.4%	0.5%	10	13.0
Mechanical Road Calls	300	250	291	189	215	10	12.8
Bus Comfort	90%	74%	68%	71%	63%	13	9.1
Satisfaction with Call Center Interactions	90%	78%	68%	71%	68%	13	9.8
Bus Driver Customer Service	90%	84%	78%	81%	80%	13	11.5
Performance Score						100	104.0

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TAKEAWAYS

The Road Forward

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Takeaway: On-Time Performance

On-Time Performance

- On-time performance is the most important element of service to bus customers.
- 53% of customers agreed that buses usually run on-time.
- Resident customers' impression of on-time performance in Wave 12 decreased 20% compared to Wave 11.
- Tourist customers' satisfaction with the bus arriving on time decreased by 8% from Wave 11.
- Tourist customers in Wave 12 are more willing to wait longer for a bus not arriving on time.

Recommendation

- Determine why customers believe the on-time performance is poor.
- Create an onboard campaign to educate customers of RTC's actual on-time performance.
- Continue to monitor on-time performance to ensure it is meeting customer needs.



Takeaway: Driver Performance

Driver Courteousness and Assisting Passengers

- Resident satisfaction with drivers being courteous and assisting passengers decreased 7% from Wave 11 (76%).
- Residents indicated all other driver metrics stayed the same or increased from Wave 11.
- Tourists' satisfaction with drivers being courteous and assisting passengers continued a downward trend, decreasing 10% from Wave 10 to Wave 12.
- All other driver metrics increased for tourists.

Recommendation

- Develop driver training specifically devoted to courteousness and assisting customers. Include training for dealing with difficult customers.
- Encourage driver friendliness and create an incentive program for drivers to participate and engage in promoting courteousness among each other.
- Communicate the trainings to customers and develop a process where customers can identify drivers who are exhibiting great customer service skills.

Takeaway: Bus Comfort and Bus and Bus Stop/Shelter Cleanliness

Bus Comfort

- Resident satisfaction with bus comfort deceased by more than 10% in Wave 12.
- Tourist customer satisfaction with bus comfort decreased slightly among tourists in Wave 12, resulting in a 9% decrease from Wave 10.

Bus and Bus Stop/Shelter Cleanliness

- Bus cleanliness is one of the top 5 factors of importance for residents.
- Resident satisfaction with bus cleanliness continued a downward trend and decreased 13% from 63% in Wave 11.
- Resident's satisfaction with bus stop and shelter cleanliness decreased the most, by 17%, compared to Wave 11 (53%).

Recommendation

- Engage bus operators for their ideas on opportunities for "quick wins" on improving bus and shelter comfort and cleanliness based on their firsthand knowledge of the issues.
- Implement Vehicle Cleaning Campaign, including process improvements and collateral to tell customers what RTC is doing to address their concerns.
- Work with local governments to provide cleaning services to shelters that may be more heavily used.

RGRTA saw increases in Customer Satisfaction after implementing the "Bus Doctor" campaign to address vehicle cleanliness.



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Takeaway: Safety and Security

Safety & Security

- Perceptions of safety and security decreased among residents and tourists in Wave 12.
- Customers who were not satisfied with safety/security at bus stops and shelters are most concerned with a lack of security personnel (156% increase) and other people at or around the stop (33% increase)
- Tourists' customer satisfaction feeling safe and secure while standing at stops or shelters continued a downward trend, a decrease of 16% from Wave 10 (85%) to Wave 12.
- Tourist customers indicate the most common reasons they do not feel safe and secure at bus stops and shelters are other people at or around the stop and a lack of security personnel.
- Tourists' customer satisfaction with the overall safety of RTC service continued a slight downward trend, with a decrease of 9% from Wave 10 to Wave 12.

Recommendation

- Identify highest priority shelters for increased lighting.
- Coordinate with other government agencies to add/increase lighting at bus stop/shelters.
- In marketing to tourists, messaging around safety of the transit system may help improve perceptions of safety.

Takeaway: Alternative Transportation Options

Alternative Transportation Options

- Of the 47% of residential customers who indicate they use Uber or Lyft instead of the RTC bus system, 28% do so more than once a week.
- 47% of these customers indicate travel time as the most common reason they use Uber or Lyft instead of RTC.
- Among tourists, Uber and Lyft usage continues to increase, with over 58% using Uber or Lyft at least once during their trip.
- These customers indicate they did not consider taking public transportation as the most common reason why these use alternate transportation.
- About 82% of tourists would be willing to use an RTC-operated shared-ride on-demand service, an increase of 8% from Wave 11.

Recommendation

- Promote to customers the actual travel time and on-time performance of the RTC system.
- With the recent rollout of RTC's Trip to Strip pilot project, continue to gather feedback from customers to provide the best service and connection to the places they want to go.

QUESTIONS?