Agenda Item 3e

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TO: Clipper® Executive Board   DATE: August 15, 2016

FR: Carol Kuester

RE: <u>Clipper® Customer Satisfaction Survey Results</u>

MTC engaged Corey, Canapary & Galanis (CC&G) to complete our bi-annual Clipper® customer satisfaction survey for fiscal year 2015-16. This survey effort involved a quantitative and qualitative component.

The quantitative survey, which focused largely on information resources, asked customers to rate their satisfaction with Clipper® on a 1 to 5 scale, with 5 being the most satisfied. The results indicate that current Clipper® customers are very satisfied using their card, with a mean (average) rating of 4.3 out of 5. This is the equivalent of 97 percent rating their satisfaction level a 3, 4 or 5. When asked if they would recommend Clipper®, 93 percent of users said they would recommend Clipper® and rated the statement 3, 4 or 5, providing an overall rating of 4.49. Attachment A includes more topline results from the quantitative survey.

The qualitative survey suggests that the Clipper® website is customers' primary resource, but that some people who have not opted in to receive email updates from Clipper® might find value in such emails and could be enticed to opt in if provided some incentive. Three-fourths of those interviewed expressed a preference for customer service provided by a person, rather than self-help services, and the vast majority of these prefer to receive help over the phone. Thirty-seven percent said they desired no improvements in Clipper®, while smaller percentages requested improvements in add-value and Autoload processes and better access to current card balances. Attachment B presents the high-level results of the qualitative survey.

Methodology
In past years, MTC's primary means of conducting Clipper® customer satisfaction surveys involved calling a random sample of registered customers. However, state privacy laws now severely restrict our ability to contact Clipper® customers by phone. Therefore, MTC implemented an intercept survey (offered in English, Spanish and Chinese) that was complemented by the option to complete a mail-in survey or call a phone number to complete the survey in a language other than English, Spanish or Chinese.

The intercept survey was conducted in November 2015 among Clipper® users on 13 different transit systems in the Bay Area. In total, CC&G collected 2,127 completed quantitative surveys, including contact information from approximately 400 respondents willing to participate in the follow-up qualitative survey. In April 2016, CC&G completed 95 qualitative surveys among this pool of respondents.

The quantitative survey included questions about overall satisfaction with Clipper®, as well as satisfaction with Clipper® customer service and Autoload for customers who had used these features. The survey also included questions about transit use, typical means of adding value, awareness and usage of Autoload, interactions with Clipper® customer service, and demographic information so that we could also analyze customer satisfaction in the context of these variables.

The qualitative survey focused on Clipper® awareness, information resources, customer service preferences, and positive and negative attributes.

We cannot directly compare the results of the fall 2015 survey to those of prior surveys due to the change in methodology. While in past years we only reached registered customers who had provided valid phone numbers, the intercept methodology enabled us to collect data from unregistered customers, who do not have access to the full range of Clipper® features, such as Autoload, card balance protection and online account management. Knowing that transit riders would have limited time to complete the survey, we streamlined the questionnaire and only retained core questions from previous Clipper® surveys. We anticipated that the follow-up qualitative survey would provide us with an opportunity to ask questions to gather data on other areas of interest to the transit operators and MTC.

Transit operator representatives reviewed the quantitative and qualitative survey instruments and provided feedback based on their own survey efforts. With input from the operators, we developed a qualitative survey questionnaire to collect data about how unregistered and registered customers use Clipper® and their preferred channels for accessing customer service assistance and information about Clipper® and transit.

Conclusion
We anticipate that the results of this survey effort will help us identify opportunities for improving the current system and customer communications interfaces, as well as inform our next-generation Clipper® planning efforts.

Carol Kuester

Attachments:
- Attachment A: Clipper® Customer Satisfaction Quantitative Survey Topline Results
- Attachment B: Clipper® Customer Qualitative Survey Topline Results
- Attachment C: Clipper® Customer Survey Results

Clipper® Customer Satisfaction <u>Quantitative</u> Survey Topline Results

Satisfaction with Clipper®
- Clipper® users are very satisfied with Clipper®, with a mean (average) rating of 4.3 out of 5; 97 percent rated Clipper® a 3, 4 or 5.
- Ninety-three percent of users said they would recommend Clipper® with an overall rating of 4.49.

Adding Value to Clipper®
- Thirty-seven percent typically add value at a transit station or terminal, while 29 percent had used Autoload, and 25 percent add value at a store or retail location. (Multiple responses accepted.)

Autoload
- Thirty-one percent of Clipper® users are currently using Autoload.
- Of those who have <u>*never*</u> used Autoload, 51 percent had never heard of it, while 49 percent said they were aware of it, but do not use it.
- Autoload users give it an average satisfaction rating of 4.17 (out of 5), with 93 percent of respondents rating their Autoload experience 3, 4 or 5.

Clipper® Customer Service
- More than a quarter (26 percent) of respondents have contacted Clipper® Customer Service in the past 12 months; most did so by phone (74 percent), while 20 percent contacted Clipper® Customer Service online and 19 percent did so in person. Multiple responses were allowed.
- Those who contacted Clipper® Customer Service rated their interaction 3.96 (out of 5), with 87 percent rating their experience "3", "4" or "5."

Improvements to Clipper®
- When asked for one key suggestion to improve Clipper®, 18 percent of respondents said to either address Autoload or other loading/reloading issues, while 13 percent said addressing equipment or location issues.

Clipper® and Transit Use
- Most Clipper® users (87 percent) used public transit in the Bay Area at least three days per week.
- When asked which transit systems they have used in the past three months, respondents most often said San Francisco Bay Area Rapid Transit District (67 percent), Muni/ San Francisco Municipal Transportation Agency (43 percent), Alameda-Contra Costa Transit District (28 percent), and Caltrain (23 percent).
- Sixty-four percent have had their Clipper® card for more than year.

Clipper® Customer <u>Qualitative</u> Survey Topline Results

Clipper® Awareness and Use
- Respondents cited friends and family, a flyer or ad, and something they saw at a transit agency, station or stop or transit agency staff as most common ways they found out about Clipper®.
- A majority said they always use Clipper® when riding public transit in the Bay Area.
- The most common reasons given for not always using Clipper® were:
  o Concerns about overcharges or the belief that some paper forms of ticketing provide a better value;
  o Occasionally forgetting or misplacing their Clipper® card; and
  o Mistrust of some agencies' administration of Clipper® on their systems.

Clipper® Information
- Most respondents would use the Clipper® website as a resource, although a significant number would rely on transit agency staff.
- On the subject of opt-in emails, more than half of registered cardholders who do not currently receive such emails say they just don't want or need such emails or do not really use email, but about a quarter of those currently not receiving emails say they do not recall that such emails were ever offered. Promotions, discounts, and free rides could entice those currently not subscribed to reconsider.
- About two thirds of those whose cards are not registered did not know that they could receive emails from Clipper® once they register their card. About half of these respondents indicated they might be interested in registration in order to receive email updates – particularly if the updates included discounts or other financial incentives.

Customer Service
- When asked how they preferred to be helped when they had a problem or question about their Clipper® card, three-fourths said they would prefer to receive help from an actual person, as opposed to self-serve options (like an online form or an automated phone service).
  o Of the respondents who indicated they preferred help from an actual person, most respondents said phone was their preferred method of personal contact.
  o While only a small number would prefer in-person help, most of these indicated they would travel up to 10 miles for this type of assistance.

Positive/Negative Attributes of Clipper®
- Respondents said Clipper®'s best features were ease of use, not having to wait in line to buy tickets or passes, use on multiple agencies and relatively easy to load/Autoload.
- When asked for suggested improvements to Clipper®, more than a third said 'nothing' or otherwise indicated there was nothing to improve that they could think of (a very positive response).
- The top areas for improvements identified were:
  o Improvements to online payments, reloading, or Autoload
  o Greater access to current card balance
  o More ways to add value quickly (particularly at transit stations/terminals)

Clipper®
Customer Survey Results

Clipper Executive Board

August 22, 2016

Methodology

Two-part research initiative

- 2,127 intercept surveys conducted on 13 agencies in November 2015
    - Margin of error was +/- 2.1% at the 95% confidence level

- 95 in-depth phone interviews in April with survey respondents who agreed to follow-up calls
    - Not statistically significant, but provides indicators about customer experiences and preferences

Involved both registered and unregistered customers

Clipper Survey Demographics

Age		Employment	
18-34	43%	Employed full-time	68%
35-54	34%	Student	12%
55-64	13%	Employed part-time	10%
65+	8%		

Income		Ethnicity*	
<$25K	20%	White	55%
$25K-49K	19%	Asian	27%
$50K-74K	16%	African American	13%
$75K+	25%	*multiple responses allowed	

| Gender		Hispanic	
Male	53%	No	81%
Female	47%	Yes	19%

Customer Satisfaction

- Clipper users are very satisfied with Clipper, with an average (mean) rating of 4.30 out of 5.00; 97% rated Clipper a 3, 4 or 5

- 93% of users said they would recommend Clipper with an overall rating of 4.49

■ 1 (Very Unsatisfied)   ■ 2   ■ 3   ■ 4   ■ 5 (Very Satisfied)
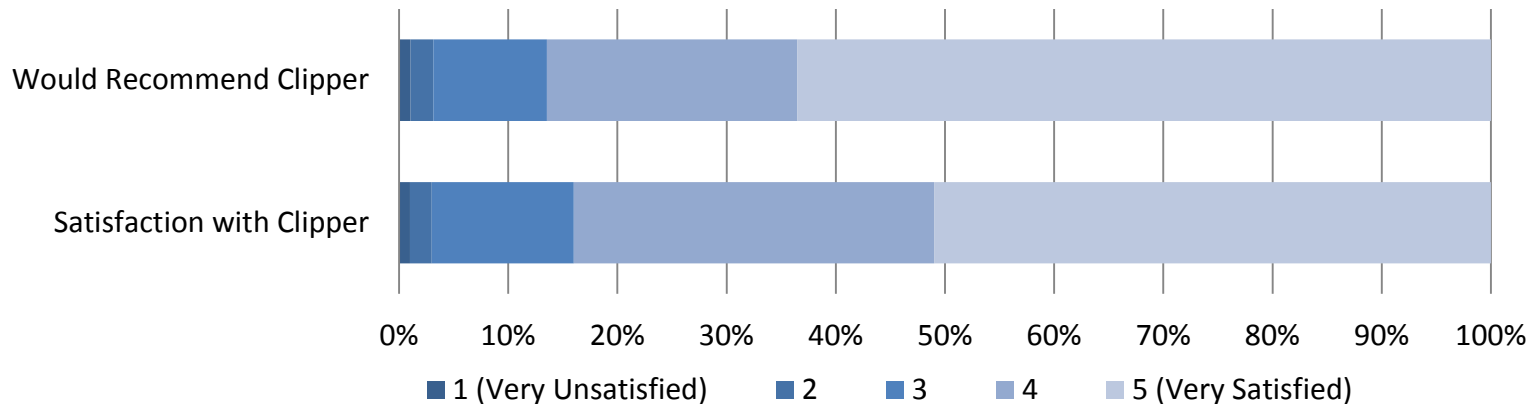
Autoload

- Roughly two-thirds of respondents are aware of Autoload

- Fewer than one-third of respondents currently use Autoload
    - Autoload users rate the feature 4.17 out of 5.00, with 93% rating their Autoload experience 3, 4 or 5

Satisfaction with Autoload

0%   20%   40%   60%   80%   100%

■ 1 – Very Unsatisfied   ■ 2   ■ 3   ■ 4   ■ 5 - Very Satisfied
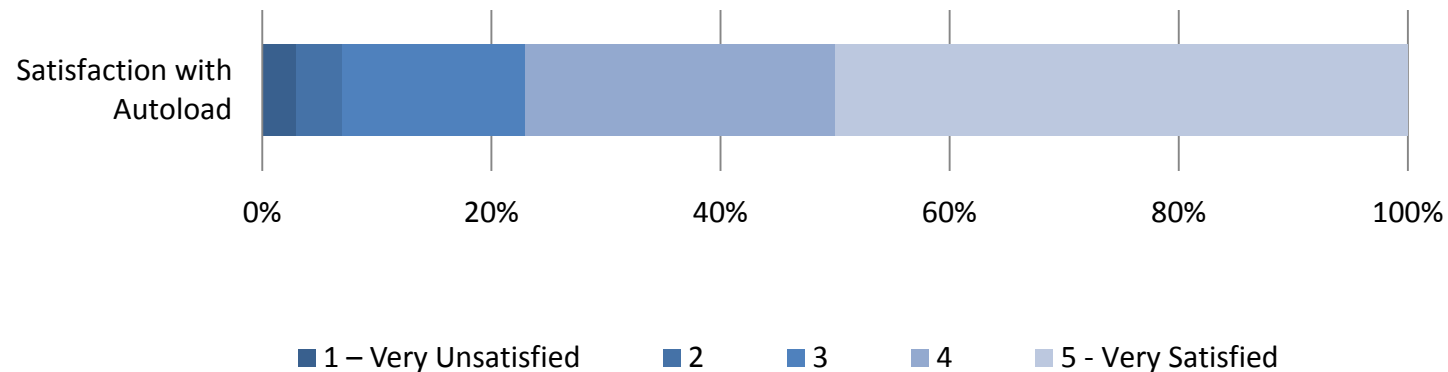
Customer Service

- Roughly one-quarter have contacted Clipper Customer Service

- Three-quarters of these did so by phone

- 87% who contacted Clipper Customer Service reported satisfaction (3, 4 or 5) with an average rating of 3.96 out of 5.00

Satisfaction with Customer Service

0% 20% 40% 60% 80% 100%

■ 1 – Very Unsatisfied   ■ 2   ■ 3   ■ 4   ■ 5 - Very Satisfied
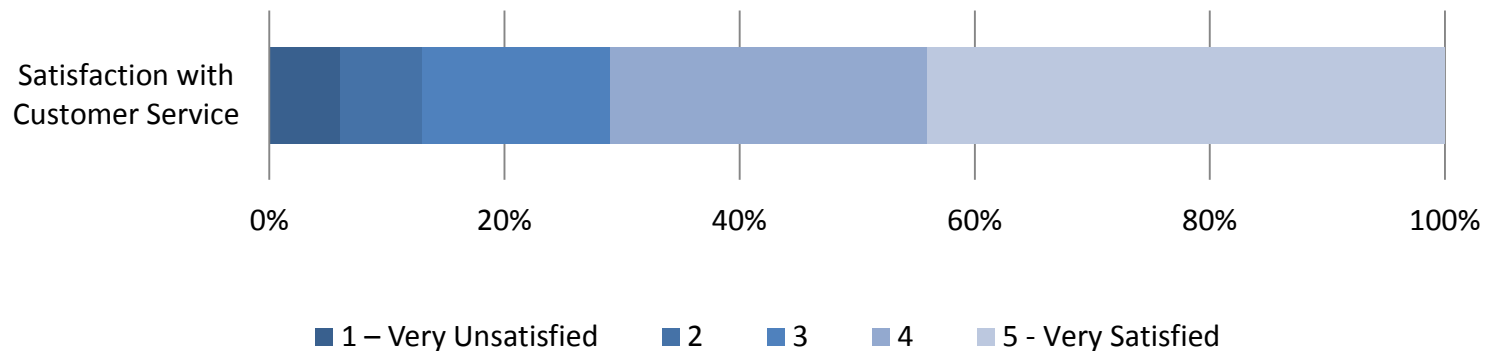
In-Depth Interview Highlights

- The website is the primary resource for Clipper information, though many would also rely on transit agency staff

- Some were unfamiliar with the opt-in emails, but many were not interested without a financial incentive

- Most prefer receiving customer service via a live person on the phone

Best Features	Areas for Improvement
• Ease of use • Not having to wait in line to buy tickets • Use on multiple agencies • Ease to load/Autoload	• Reloading and Autoload • Access to card balance • More ways to add value quickly (such as at transit stations)