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CUSTOMER SATISFACTION SURVEY

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Marketing
January 10, 2012



Agenda

- Methodology
- Customer Profile
- Survey Results
 - Overall Ratings
 - Key Factors
 - Timing and Connections
 - Communication
 - Customer Service
 - Cleanliness
 - Safety
- Learnings and Next Steps

Background and Methodology

- Data collection method: Both print and on-line surveys
- Field Dates: September 19 – 30, 2011
- Sample
 - 50,000 Surveys were distributed and 3,700 were tabulated
 - (+/- 1.6 % margin of error at 95% confidence level)
 - What does this mean
 1. If this study was conducted 100 times, we would see the same scoring 95 times
 2. Margin of error example:
 - In the case of a score of 77 and 75, with a 1.6% margin of error, the difference is parity and not statistically different
 - A score of 77 (+/- 1.6%) = **75.8** - 78.2 range
 - A score of 75 (+/-1.6%) = 73.8 - **76.2** range

- Board Strategic Focus
 - Priority #1 - Strive to exceed customer expectations

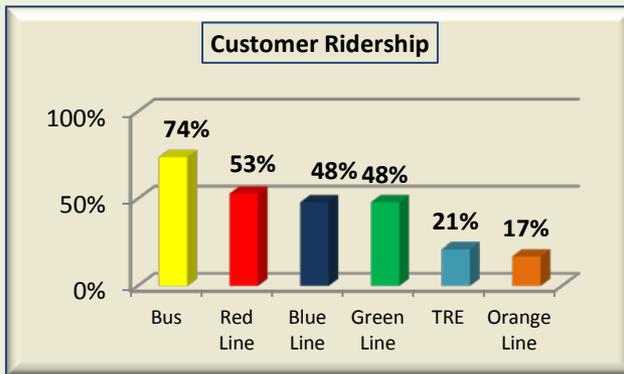
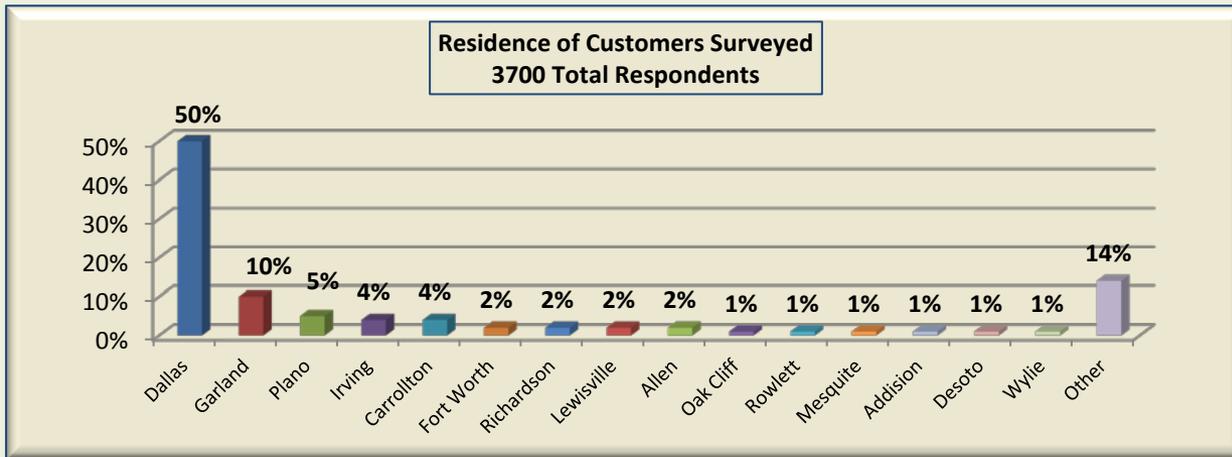
Executive Summary

- Overall, the survey scores are at parity versus a year ago
 - 9 of 10 customers surveyed are satisfied with DART
 - Very difficult to sustain high scores against customers with long tenure
 - 94% of customers who have ridden DART for 6 months or less are satisfied versus 86% of those who have ridden DART for 1+ years
- There are five key factors affecting customer satisfaction:
 - Timing/Connections
 - Communication
 - Customer Service
 - Cleanliness
 - Safety/Security
- The Customer Satisfaction Survey represents just one data point for continuous customer improvement
 - Customer Satisfaction Survey
 - Call Center
 - Actual Performance Measures



Customer Profile

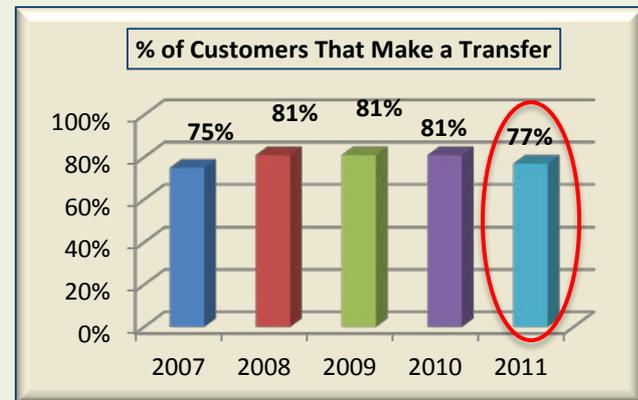
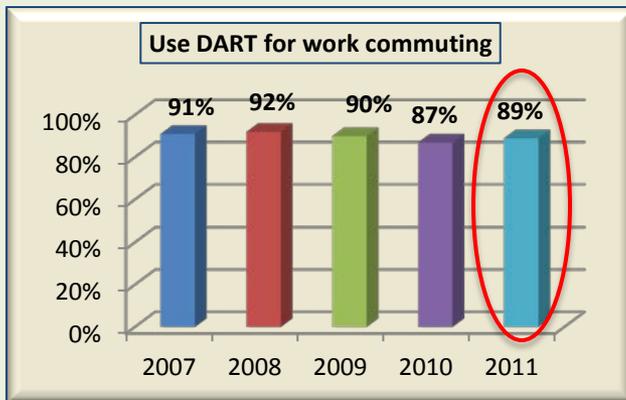
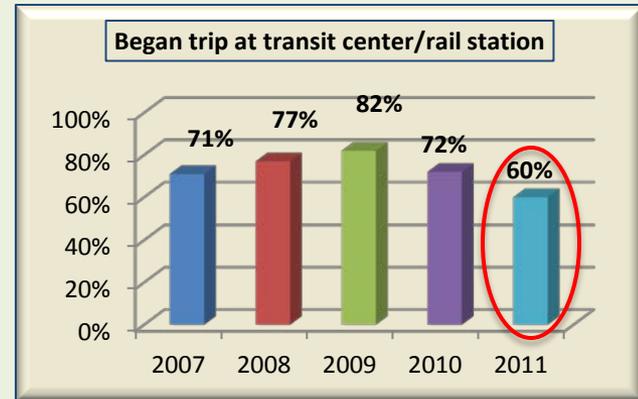
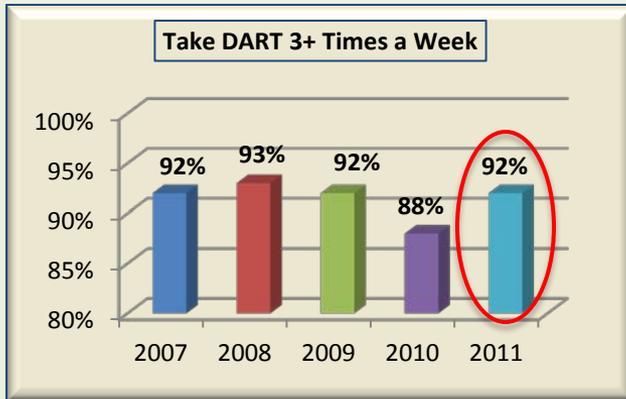
- Half of customers surveyed were from Dallas
- Almost 75% of surveyed customers rode the bus
- Over half of those surveyed have access to a car



Questions: 1. In what city do you live? 2. Do you ride: (please check all that apply) 3. Do you have a car available to make this trip?

Customer Profile

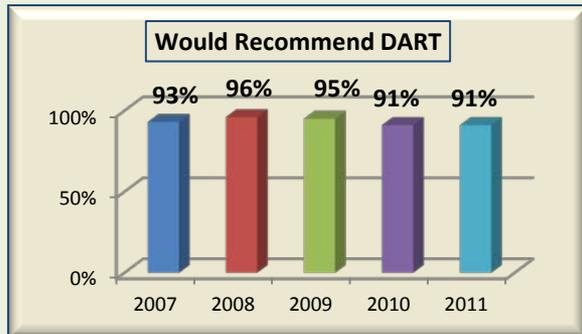
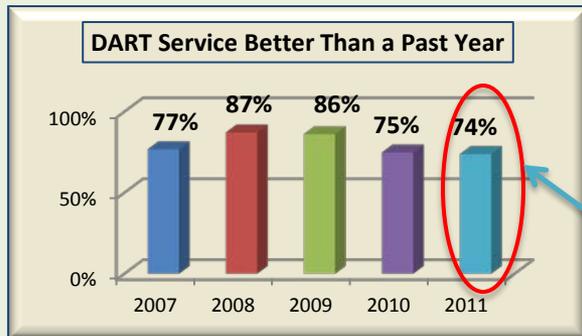
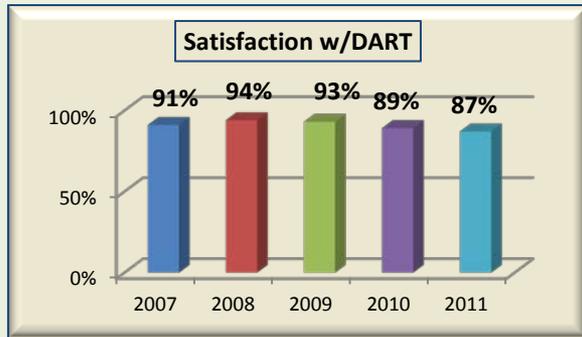
- The majority of the survey respondents are commuters that use more than one DART mode on a regular basis



Questions: 1. Did you take DART more than three times last week? 2. Did you begin your trip at a DART transit center or rail station 3. Do you use DART primarily to commute to work? 4. Do you have to make transfers to complete your trip?



Overall Ratings



- The top-line ratings have remained consistent – there has been no statistical change year-over-year
 - 9 of 10 customers are satisfied with DART
 - While 74% of customers say the service is better than a year ago, 9 of 10 customers would recommend DART
 - Of the 26% that say DART service is not better than a year ago, 63% are satisfied with DART



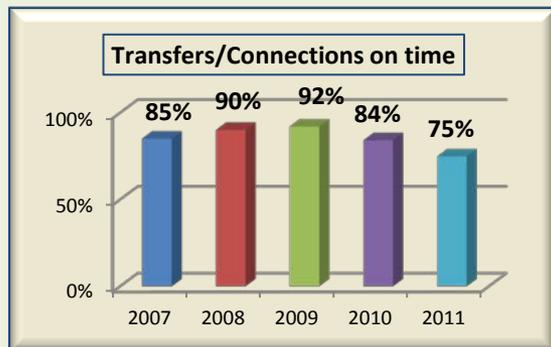
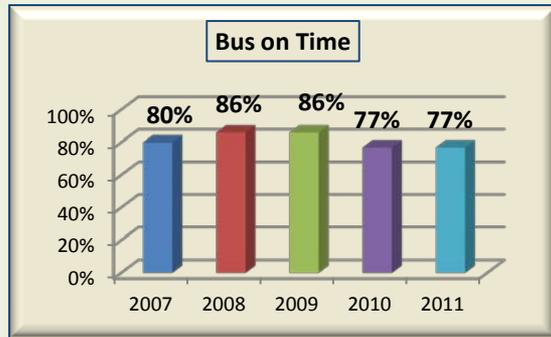
Overall Ratings Key Learnings/Activity

1. The longer people use our system the more difficult sustaining consistent measures
 - “Newness” factor wears off
 - Higher chance to encounter issues over time
 - Customers see it as a functional or commodity item only
2. Understanding the factors of those who are satisfied and those who aren't satisfied is key
 - Customer satisfaction is driven by five key areas:
 - Timing/Connections
 - Communication
 - Customer Service
 - Cleanliness
 - Safety/Security
3. The need to modify our testing methodology for better customer understanding
 - Are you very satisfied, somewhat satisfied, indifferent, somewhat unsatisfied, or very satisfied with DART services?
 - How is service versus a year ago? Much better, somewhat better, the same, somewhat worse, much worse

Key Factors

- Timing and Connections
- Communication
- Customer Service
- Cleanliness
- Safety/Security

Timing and Connections



- Timeliness of buses and trains has stayed consistent
 - Buses on time has stayed consistent to a year ago
 - Over 90% of customers have agreed that the trains have been on time
- A key driver for customer satisfaction is ensuring timeliness between transfers and connections
 - Missing the bus after a train or bus stop is a major component of satisfaction

Timing and Connections Key Learnings/Activity

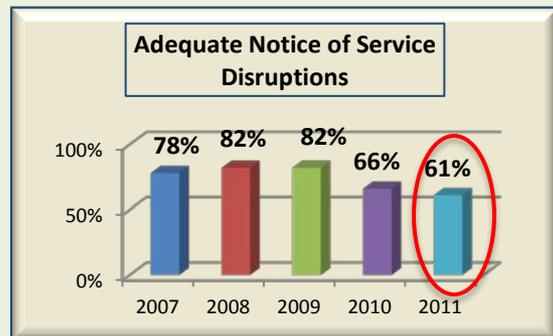
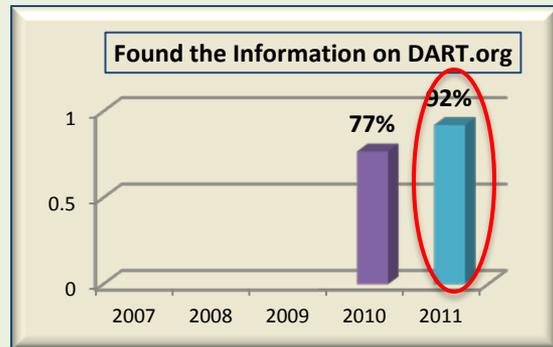
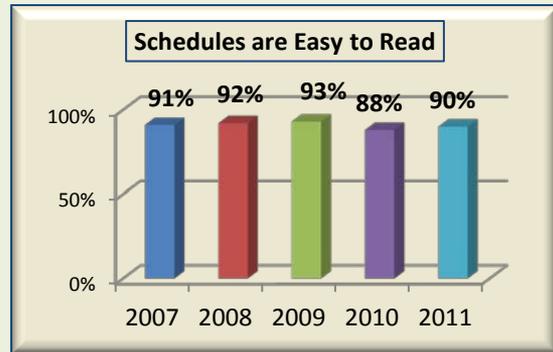
- **June 2011** – Modified operating policies
 - Mandates Bus Operators to wait two minutes beyond their scheduled departure if the train is in sight of the station.

- **3rd Quarter FY 2012** - A new radio system
 - Improves the information of on-time performance
 - Improves information to Bus Dispatch and Field Supervisors
 - Makes real time information available to customers
 - Provides bus dispatchers with location information allowing them to hold buses for customer connections

- **December 2012** - Comprehensive rescheduling
 - Enables rail feeder bus routes to match light rail schedules

- **TBD** - “Connection Protection”
 - Software provides guidance when to hold buses for train connections

Communication



- The on-going information appears to be accessible and easy to understand
- Improvements to DART.org have helped make navigation and finding information easy
- Notice of disruptions has had an impact on customer perception
 - Satisfaction in this area continues to decline
 - There were at least three anomalies in 2011 that exacerbated this issue

Questions: 1. Are DART schedules clear and easy to read? 2. Did you find the information you were looking for (on DART.Org)? 3. Does DART generally notify you of service disruptions adequately?



Communication Key Learnings/Activity

- **September 2011** - Introduced expansion of “Where’s my bus?”
 - Leveraging PR, YouTube, text message tools, and Bus stop ID

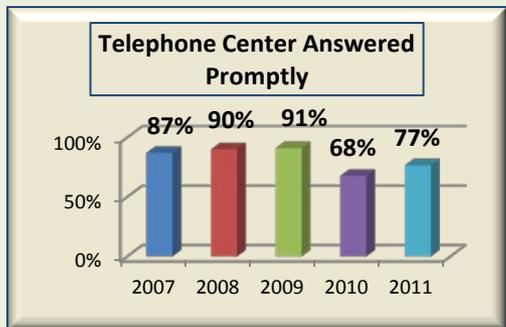
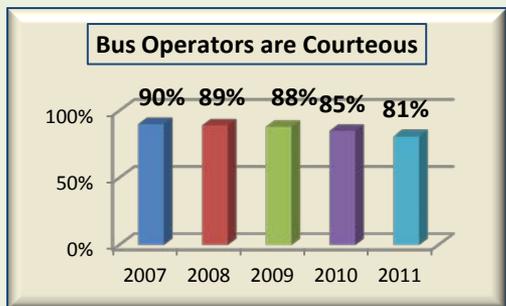
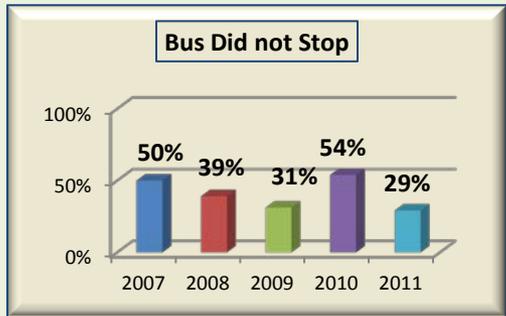
- **December 2011** – Hired (2) operations communication liaisons to improve in-transit communication
 - Real-time service alerts and additional information to bus and rail patrons using mobile technology

- **March 2012** - Launch of “Where’s my Train?”

- **Plan Completion end of FY2012** – Comprehensive messaging/communication upgrade
 - Station message boards
 - “Where’s my bus?” information at bus stop locations
 - Platform level “Next Train Signage”

- **3rd Quarter FY 2012** - A new radio system

Customer Service

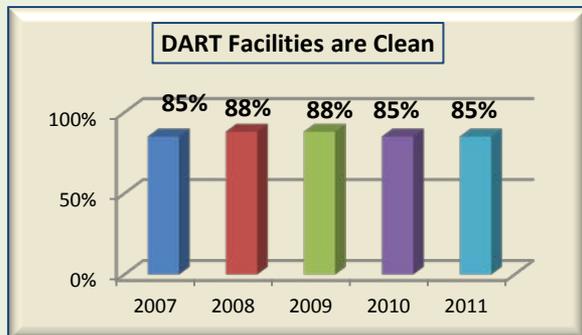
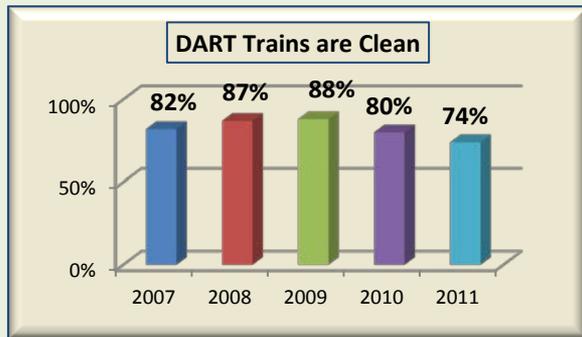
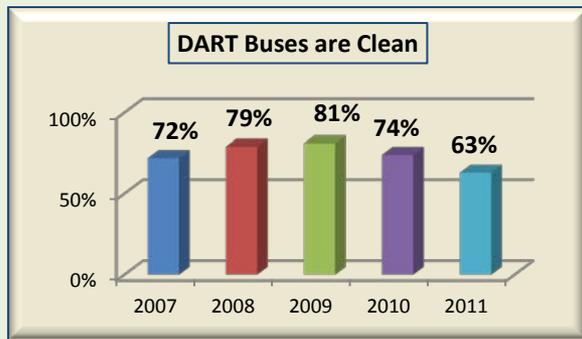


- Customer Service through bus operations is good
 - Customers perceptions of buses not stopping has declined to its lowest levels
 - Operators being courteous has remained relatively flat
- Customer Service (promptly answering phone) has rebounded from 2010, however still below 2009

Customer Service Key Learnings/Activity

- Changes to employee recruitment and training processes;
 - **1st Quarter, 2011** – Modification of new operator and refresher training to incorporate focus on customer service skill-building
 - **2nd Quarter, 2011** - New screening tools were introduced into the new operator hiring process to assure strong customer service competencies
- **3rd Quarter FY12** - Upgrades to the Integrated Voice Response
 - Correcting audio and directional/information issues
- **February, 2012** – Enhancements to the “secret shopper” program
 - Special customer service training is provided to identified employees
- Additional key initiatives;
 - **On-going** - Increased shelter and lighting at stop locations
 - **June, 2012** - Automation of bus destination signs to reduce pass-bys
 - **June, 2012** - Increased operator familiarity with routes through automation

Cleanliness

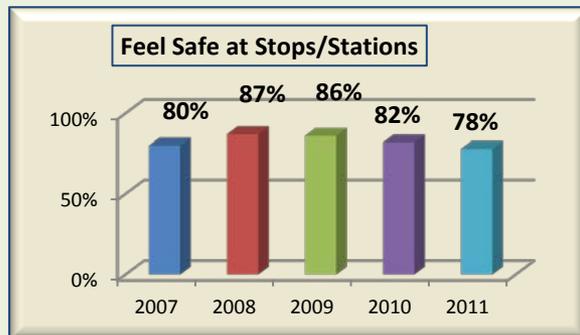
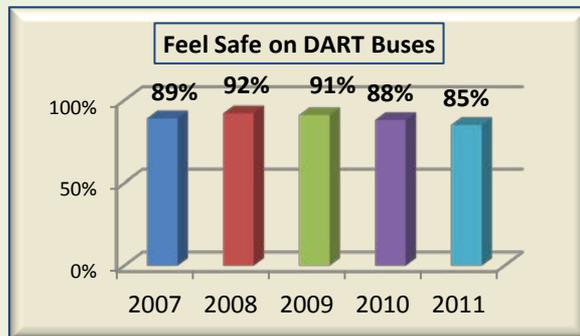


- The perception of cleanliness of buses has declined over the last three years
 - Our bus fleet is now 13 years old - that has an affect on perception of cleanliness
- DART trains have declined slightly over the three years
- Perception of cleanliness at facilities has stayed the same

Cleanliness Key Learnings/Activity

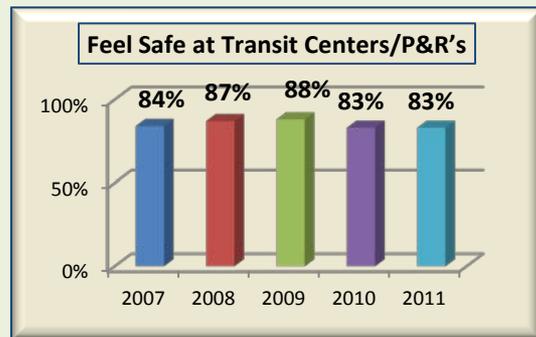
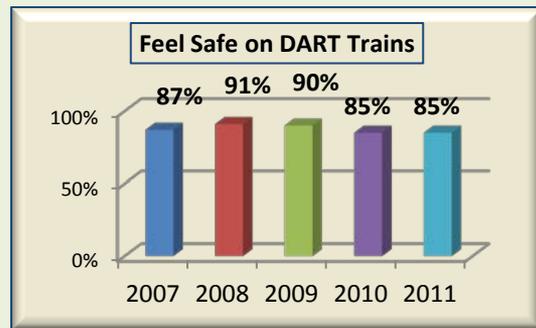
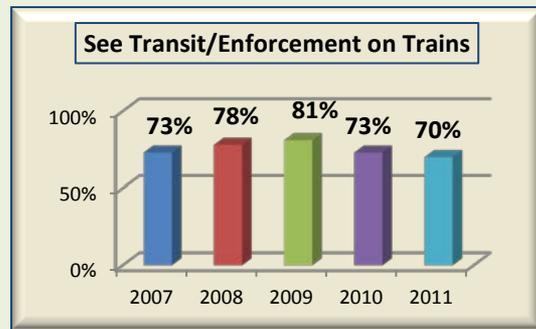
- **On-going** - Graffiti is removed from facilities, vehicles and right-of-way within 24 hours of the observation being reported
- **2013** – New bus fleet begins arriving

Safety/Security – Bus Operations



- The perception of safe operations has sustained year over year
 - 89% vs. 88% year ago
- Feeling safe on DART buses has shown some decline 85% vs. 88% year ago
 - The new buses should help provide some perception to feeling safe
- Feeling safe at stops and stations has declined to 78%, its lowest score in 5 years
 - This may be reflective of the environment at large

Safety/Security – Train Operations



- Fewer customers reported seeing transit enforcement on trains in the last five years
- This may have a direct correlation to customers decline in feeling safe on DART trains
- However, customer sense of security at Transit Centers and Park and Rides has held steady

Safety/Security Key Learnings/Activity

- **January 2012** - Increased police visibility at transit centers
- **January 2012** - Personnel assignment review to increase visibility
- **January 5, 2012** - Meeting with DPD Chief Brown implementing Juvenile initiatives
- **2Q FY12** - Complete installation of Closed Circuit Television at LRT Stations
- Increased Visible Intermodal Protection Response (VIPR) teams on-board LRT, TRE and at stations
- **June 2012 “go live”** - Forming “Super Security Teams”;
 - Transportation, maintenance and police in designated areas
- Utilize DART Finance Daily Fixed Route Performance Data for targeted efforts against fare evasion, crimes of opportunity and increased visibility

Overall Learnings and Next Steps

Learnings

Research:

- Opportunity to gain more actionable results going forward
 - Better understanding of perceptions of satisfied and unsatisfied customers
 - Understanding of share “erosion”
 - Broader understanding of our customer base

Key Factors:

- The key factors have more of an effect to drive down our measures vs. lift the measures
 - The longer a consumer is exposed to the DART system the more difficult it will be to increase satisfaction only with the key factors

Next Steps

Research:

- Modify the survey going forward
 - Survey respondents matching ridership population
 - Modify questions to a sliding scale question
 - Understand dependent/choice rider issues
 - Question of likelihood to continue using DART

Key Factors:

- Continue to focus and measure against the five key factors
- Move forward with innovative customer activities to enhance customer experience
 - Better understanding of true customer feature /benefits
 - Better promote/market the tools we have – i.e. “Where’s my bus?”



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