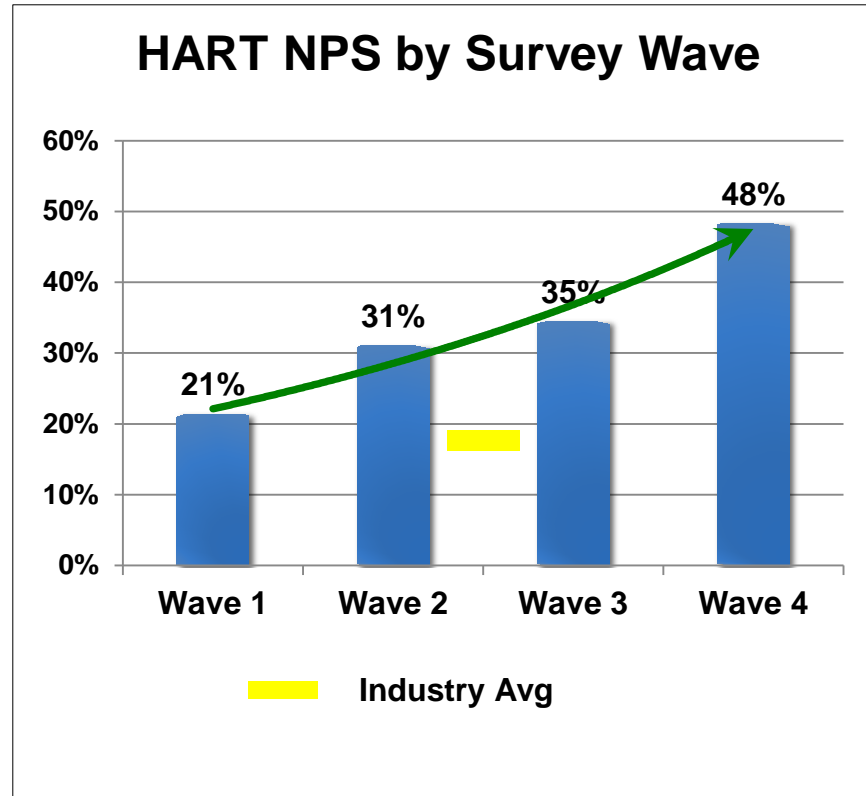


**Hillsborough  
Transit Authority  
Voice of the Customer  
Wave 4 • Jan. 2017**



# Net Promoter Score



- The Net Promoter Score has increased consistently each Wave, with Wave 4 increasing by 128% over Wave 1!

## Why did the NPS Increase?

### Overall Satisfaction

- The percent of customers who are very satisfied with HART's service overall has continuously increased each Wave, reaching nearly 50% in Wave 4.
- Over 95% of customers in all Waves feel that service quality has improved or stayed the same over the past year.

### Customer Service

- The percent of customers who agree that HART is focused on customer service continued to increase in Wave 4.

### Availability

- Nearly 90% of customers in Wave 4 agree that the location of HART bus routes are convenient.
- Customer satisfaction with the frequency of HART's service increased by 16% from Wave 3 to Wave 4.



**Follow-up Questions  
from February 6  
Board Meeting**



## How do HART's Customer Importance Factors Compare to Industry Standards?

### HART Wave 4

1. On-Time Performance
2. Fare Price
3. Travel Time

### HART Waves 1-4

1. On-Time Performance
2. Fare Price
3. Travel Time

### Industry Averages

1. On-Time Performance
2. Frequency/Availability of Service
3. Fare Price

While Frequency/Availability of Service is the second most important factor among customers throughout the industry, it is not among HART customers' top 3 factors. This reflects HART's customers' high level of satisfaction with the frequency, availability, and convenience of the HART service.

### Recommendations for Improvement

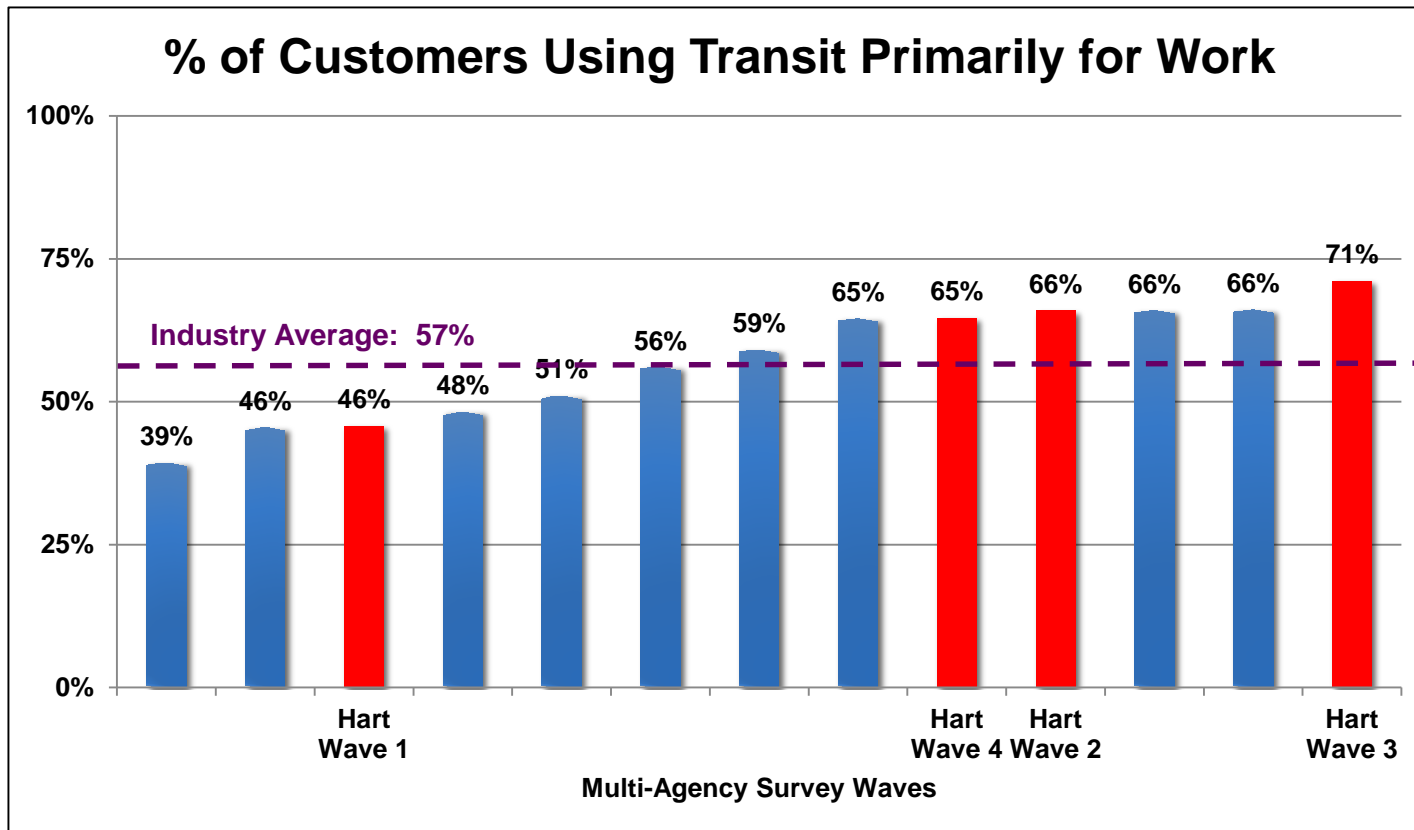
**On-Time Performance:** Customer impression of on-time performance is lower than actual on-time performance. An opportunity exists to conduct a communication campaign to inform customers about HART's actual on-time performance results.

**Fare Price:** A fare structure examination, combined with the results of the customer satisfaction surveys, could be conducted to determine the potential impacts of a fare structure adjustment. The examination would include reviews of fare structures of peer agencies and a fare elasticity analysis.

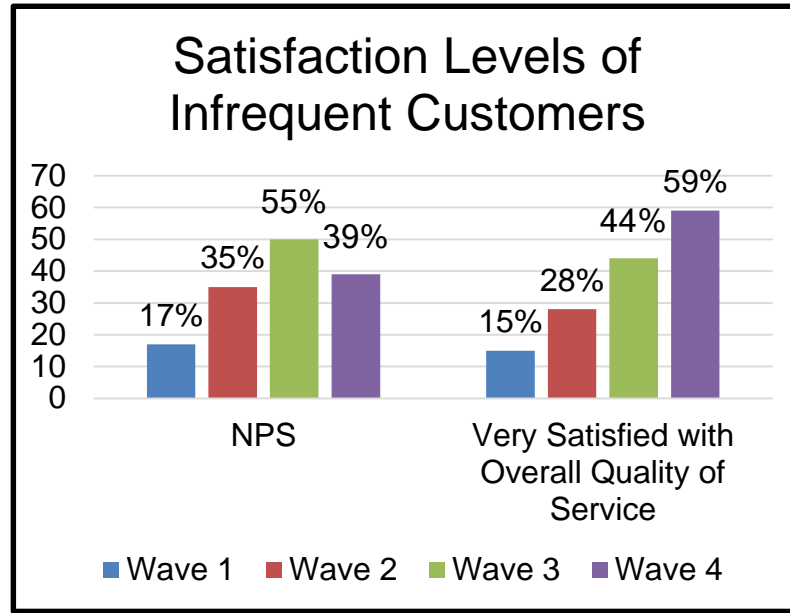
**Travel Time:** This concerns customers' impressions of ease of bus transfers and the amount of time it takes for the bus to get them to their destination. An opportunity exists for a communication campaign to inform customers of the duration of their travel time.

## What is the Statistical Significance of HART Customers' Primary Purpose for Using Transit Compared to Other Agencies?

- In 3 of 4 survey waves, HART customers indicating work as their primary trip purpose exceeded the industry average.



## What are the Impressions of HART Service Among Infrequent Customers\*?



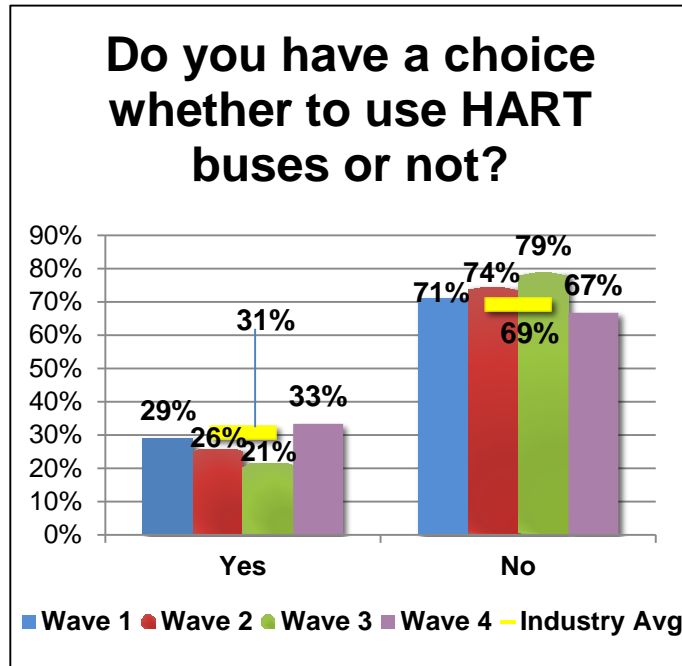
### Infrequent Customer Importance Factors Through Four Waves

1. On-time Performance
2. Route Coverage
3. Fare Price

\*Infrequent customers ride 2 times per week or less.

Through four waves, infrequent customers represent less than 12% of HART's customer base. 88% of HART's customers are frequent users, riding the bus at least 3 times per week – including 67% who ride it 5 times per week or more.

## What are HART's Discretionary Riders' Reasons for Choosing HART and Does the Community View HART as Transit Option of Last Resort or as a Choice?



- The percent of HART's discretionary riders increased to an all time high of 33% in Wave 4.
- Among discretionary riders in all waves, convenience and economics are the most frequently cited reasons for using HART.
- This is consistent with our findings throughout the industry, which show that discretionary riders choose to use public transit because it's just as convenient as other forms of transportation and it saves them money.

The work we have done to date is with HART's customer base. We have a community engagement tool that we use to talk to non-customers about their impressions of transit. We would be happy to have further discussions to explain that tool to you.