



**ITEM ID:** 2024-299-0

**TRANSMITTAL DATE:** October 18, 2024

**MEETING DATE:** October 25, 2024

**TO:** Board of Directors

**FROM:** Lisa Bahr, Chief Customer Experience Officer

**SUBJECT:** Customer Experience Update for July through September 2024 (FY25 Q1)

**Issue**

Staff is updating the Committee on Customer Experience campaigns and activities for July through September 2024 (FY25).

**Recommendation**

Receive and file.

**Strategic Commitment**

This report aligns with the Strategic Business Plan commitment of:

- **Customers Are Our Business:** We respect and value our customers, putting them at the heart of all we do, and work hard to attract and retain new customers by understanding their needs and finding new and innovative ways to delight them.

**Background**

The Metrolink Customer Experience (CX) department consists of marketing, partnerships, public relations, communications, customer relations and research teams.

The CX team's FY25 goals are to enhance customer understanding and engagement, effectively communicate Metrolink's vision, brand, and value, and prioritize and support customer experience and safety initiatives. All goals tie to our department's focus on

increasing ridership, driving revenue, and enhancing the customer experience.

This report is an overview of how the Customer Experience department worked to achieve those objectives from July through September 2024.

## **Discussion**

The Customer Experience (CX) department utilizes various tools to listen to and garner feedback from Metrolink customers, potential customers, and the public. The team gathers insights into preferences, pain points, and behavior patterns through surveys, focus groups, and data analysis. Feedback loops provide the department with essential information that helps us drive awareness of Metrolink and our service offerings. This leads to potential customers considering Metrolink as a travel option and hopefully converting those potential customers into riders. Our goal is to retain our riders once they've taken our services – hence, the feedback loop continues to ensure we provide an exceptional customer experience at all touchpoints.

The CX team collaborates daily with other Metrolink departments and external stakeholders to improve our customers' experience. Key initiatives are highlighted here.

### Enhance Customer Understanding and Engagement

#### Brand Awareness Survey

Twice a year, the CX Team conducts a public opinion survey of the general population within the Metrolink service area. Each survey wave reflects the responses from 1,300 residents, both current Metrolink riders and non-riders. Results from the latest survey in July 2024 show the public's perception of the Metrolink brand. While 97% of the respondents are aware of Metrolink, one in three wrongly identify Metro trains, including the subway, as operated by Metrolink. Only buses are clearly associated with the Metro brand.

Awareness of Metrolink's low-income fare program has increased to 23%, and awareness of the Student Adventure Pass has increased to 26%.

Since November 2023, Metrolink has improved all six brand attribute pillar scores by 4-8%. The brand attributes are customer-centric, transformative, safety first, compelling, connection, and trustworthy.

#### Metrolink Digital Assistant Pilot

To help meet the needs of our customers as we welcome new riders and expand schedules, on June 26, 2024, Metrolink launched a new customer support solution pilot on the metrolinktrains.com website, the Metrolink Digital Assistant. The Digital Assistant is a chatbot that leverages conversational artificial intelligence (AI) to provide answers to customers based on the most frequently asked questions that come into the call center. These most frequent questions concern fares, schedules, stations, policies and train status. The Digital Assistant provides 24/7 customer service in English and Spanish on these topics and provides an additional avenue for the CX team to collect customer sentiment and feedback.

In the first 3 months of the pilot, there were 8,813 engagements, of which 366 (4.7%) were Spanish. Customers used the free text option during 3,086 (39.6%) of total engagements

when interacting with the Main Menu, followed by Train Status, with 1,382 engagements (17.7% of total); Schedules, with 1,343 (17.2%); and Ticket Prices, with 985 (12.6%). Customer Experience is working to incorporate additional features, as well as expand the types of questions the Digital Assistant can answer and will evaluate the pilot in Q3 of FY25 for next steps.

### Student/Youth Group Trips

Historically, teachers and administrators interested in booking a school group trip were required to call the Metrolink call center to schedule. However, Metrolink launched a new digital Student/Youth Group Trip Interest Form in July to provide more flexibility and make it easier for school group trips to be scheduled. 25 Student/Youth group trips have been reserved since launch.

## **Effectively Communicate Metrolink's Vision, Brand and Value**

### Student Adventure Pass

In collaboration with the Member Agencies, Metrolink extended the Student Adventure Pass to June 30, 2025, enabling all students to take Metrolink for free. During the summer months, the partnerships team conducted outreach to additional schools and colleges throughout Southern California to amplify messaging to new students. In advance of the fall semester, the team secured 10 new schools partnering with Metrolink to promote the Student Adventure Pass through their channels, totaling 45 partnering schools. As the team prepares for the launch of the October schedule, it is reaching out to schools to align school shuttles with the new schedule and help faculty, staff, and students plan their trips to school.

Since the program's launch, more than 42,000 Southern California students have taken at least one trip using the Student Adventure Pass on the mobile app, representing students from 681 schools across Metrolink's service area. Moreover, 720,604 passes have been activated on the app or printed from Metrolink ticket machines. In the month of August, student ridership climbed 124% compared to the same month in 2023, prior to launch of the pass in October 2023. More than one in four riders (27%) who took the train in March 2024 was a student, which is up from just 15% a year earlier. Arrow trains have the highest student ridership share, with 47% of trips taken on that line in March.

### \$15 Summer Day Pass

For the third year, Metrolink's \$15 Summer Day Pass campaign strengthened weekday summer ridership by offering customers unlimited single-day rides for just \$15. The promotion, which ended Friday, Aug. 30, achieved 62% year-over-year growth, with nearly 46,000 passes sold between Memorial Day and Labor Day. The campaign also successfully attracted new ridership, as 35% of customers who purchased a \$15 Summer Day Pass on the mobile app were first-time users.

### SoCal Explorer Loyalty Program

The SoCal Explorer loyalty program was revitalized with a new marketing plan to strengthen customer relationships, boost rider retention, and gain valuable customer insights.

The rebranded SoCal Explorer website launched in July 2024, and on July 9, a promotional email was sent to members announcing a limited-time reduction in points required to redeem reward points for Live Event cards. This promotion led to a 266% increase in redemptions from June. Additionally, 1,579 new members joined the program, surpassing the monthly goal

of 1,248, with the total active membership reaching 18,698, nearing January 2024 levels.

In September 2024, a sweepstakes offering two VIP tickets to Redlands Oktoberfest was introduced exclusively for SoCal Explorer members. This promotion, part of a partnership with the Optimist Club of Redlands to promote Arrow service, runs from September 16 to 29, with the winner to be announced on September 30.

Overall, the new SoCal Explorer marketing plan has driven membership growth and increased reward redemptions, with ongoing promotions expected to sustain this momentum.

#### Lost & Found Partnership

Metrolink formed a new partnership with LA Metro's Adopt-a-Bike program in August 2024. Unclaimed bikes in Metrolink's Lost & Found are donated to Metro for their community refurbishment and donation programs. Through this program, seven bikes were donated in September.

#### Latino Heritage Month

On Wednesday, Sept. 18, Metrolink hosted a fun and festive Latino Heritage Month celebration at LA Union Station. Customers passing through in the late afternoon and early evening enjoyed live music provided by local marimba performers stationed in the west portal waiting area and a norteña ensemble that brought the excitement of the event directly to riders on Metrolink's platforms. The interactive celebration allowed Metrolink staff to engage with riders at multiple touchpoints throughout the station to hear from customers directly and pass out branded swag and snack items that are staples within Latino communities.

Telemundo prominently featured the event through multiple news cycles, and several additional news outlets attended, resulting in an audience reach of more than 250,000. Over 40 Metrolink trains arrived or departed Union Station during the event, and thousands of Metrolink customers stopped to interact with at least one of the onsite activations.

### **Prioritize and Support Customer Experience and Safety Initiatives**

#### September Heat Wave

From Thursday, Sept. 5, through Sept. 9, when temperatures throughout the region exceeded 110 degrees, the CX team communicated service-related issues associated with the heat wave while providing alternate transportation to Metrolink customers. Over those five days, the team updated customers regarding nearly 225 heat-related Metrolink and Arrow train cancellations and delays.

The CX team also helped Metrolink raise the Emergency Operations Center level to "Increased Readiness." This enhanced level meant all departments would continue to monitor conditions and be prepared to make alternate plans to maintain service and accommodate customers.

The team provided alternate transportation to over 250 customers via Omnitrans, Uber, and Lyft, who experienced train cancellations and delays of more than 60 minutes throughout the heatwave. Over those five days associated with the heat wave, the communications team distributed nearly 500 elements of information to the community, stakeholders, customers, and the media.

### Rail Safety Month

September was Rail Safety Month, and Metrolink again participated in this state-wide campaign to promote safe behavior around train tracks. The Agency partnered with member agencies, law enforcement, elected officials, Operation Lifesaver, and rail operators throughout the region to promote safety on and around the railroad.

Metrolink launched a comprehensive social media campaign with messages including, "Always be Alert, Stay Safe," "Stay Safe. Keep Clear. Always be Alert," and "Stay Safe. Tracks are No Place to Walk."

Metrolink also held the official "Red Out for Rail Safety" day on September 27. Each Wednesday in September, the Los Angeles County Sheriff's Department, Metrolink Bureau, and partnering law enforcement agencies conducted grade crossing enforcement and educational exercises. These efforts coincided with a suicide prevention outreach event at Los Angeles Union Station in coordination with Didi Hirsch Mental Health Services.

### Customer Information Booth

Metrolink Customer Relations once had an information booth in the passageway at Los Angeles Union Station; however, station management suspended it several years ago for security reasons. Recently, Metrolink received approval to reinstate a booth in the passageway. In September, a refurbished information booth staffed by customer relations team members was reintroduced to customers. It improves Metrolink's visibility and provides customers with a consistent point of contact when they have questions or need assistance during a service disruption. It also offers printed timetables and marketing materials.

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### **Attachment(s)**

[Presentation - CX Update Q1 FY25](#)