



Customer Acquisition & Experience



Overview & Strategy 2024

Board of Directors – June 5, 2024

CX: Our Building Blocks

Existing Customers

CX owns Customer Communications within the **'paid area.'**

We strive to exceed expectations and bring moments of **surprise & delight.**

Rider Input

CX actively engages with riders to **address concerns** and suggestions, all to **enhance the experience.** We analyze customer feedback & data for actionable insights.

Customer Journey

From websites and maps, to payment experiences and mobile apps, we view every touchpoint to **ensure a seamless and frictionless journey** for our passengers.

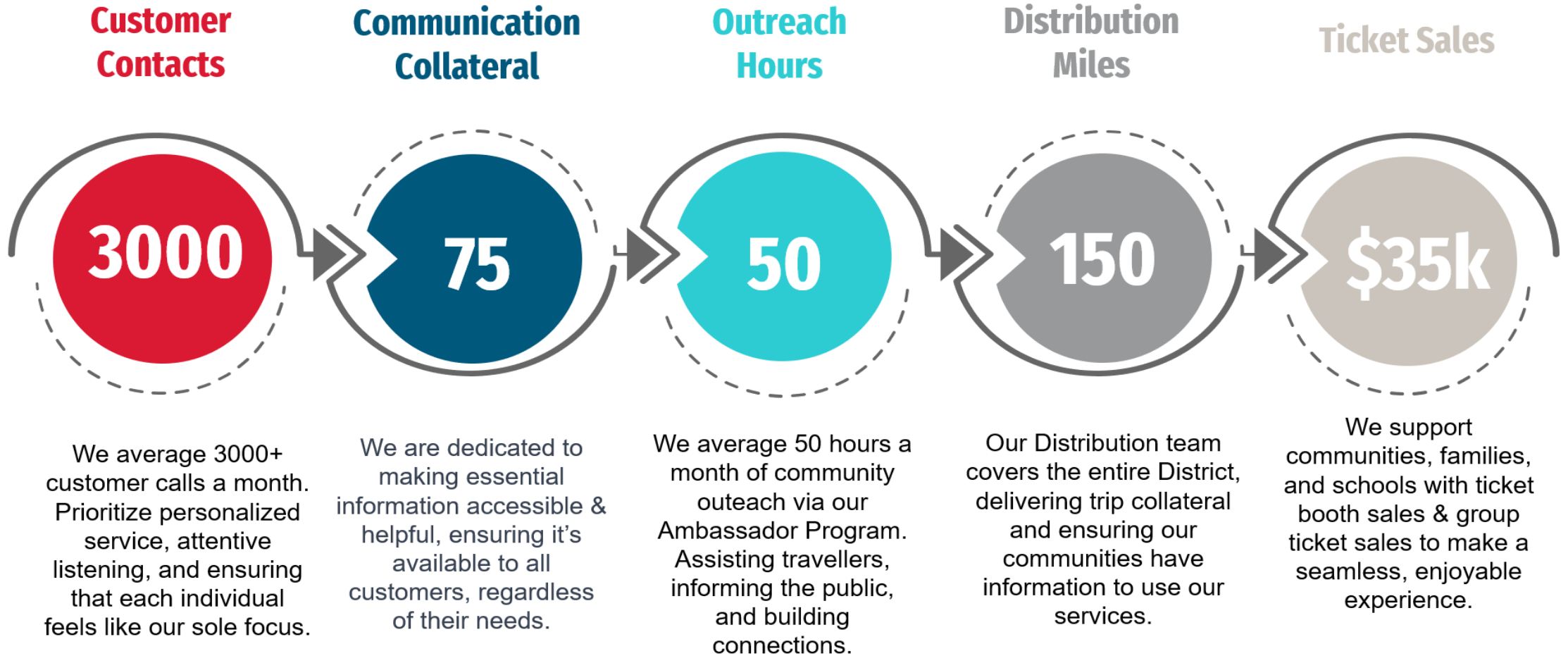
Partnerships

We **partner** with regional transit agencies, advisory boards, and communities to enhance SamTrans, focusing on **customer retention and increased ridership.** Unite the org around the customer.

The Importance of Customer Experience Strategy



Customer Experience: By the Numbers



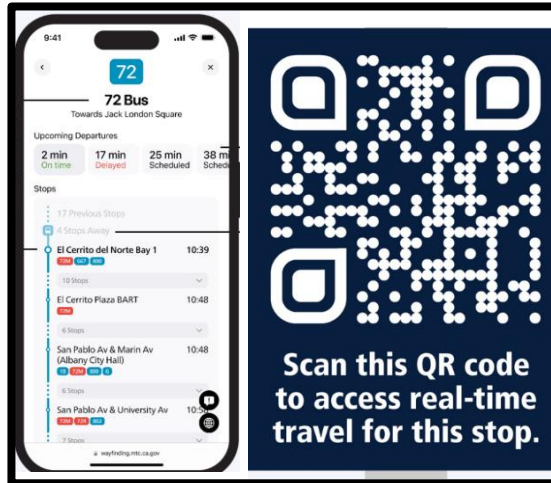
Customer Sentiment

2021 Triennial Customer Survey showed 79% were satisfied with SamTrans.

Courtesy of Bus Operators and Cleanliness of Bus



Desire for real-time predictions at stops & mobile-friendly alerts



Challenges navigating the SamTrans system



More Frequency for Buses





Elevating the Customer Experience

The Customer Journey | CX Perspective

We see the customer journey having 5 main pillars. These pillars are at the heart of our strategy.



AWARENESS

- SamTrans services
- Places we go
- Promotions
- Fare Information
- Equity initiatives
- Self-help



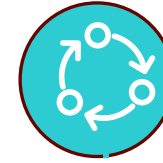
DISCOVERY

- Trip Planning
- Timetables
- Mobile apps
- Accessibility
- Passes & Clipper
- How to Ride
- Live maps
- Live support



RIDER EXPERIENCE

- Ticket purchasing
- Real-time alerts
- Regional Wayfinding
- Facilities
- Trip information
- Fast help & support
- First & last mile experience



RETENTION

- Satisfaction
- Repeat ridership
- Fast solutions
- Safety
- On Time Performance
- Places we go
- Affordability



ADVOCACY

- Customer Satisfaction
- Loyalty
- Ease of Use
- Surprise & Delight
- Brand Recognition
- Community Trust

Physical Improvements

Experience, Cleanliness & Maintenance

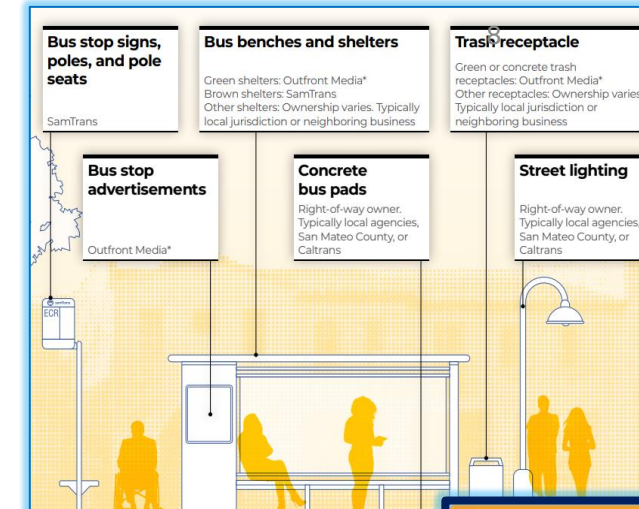
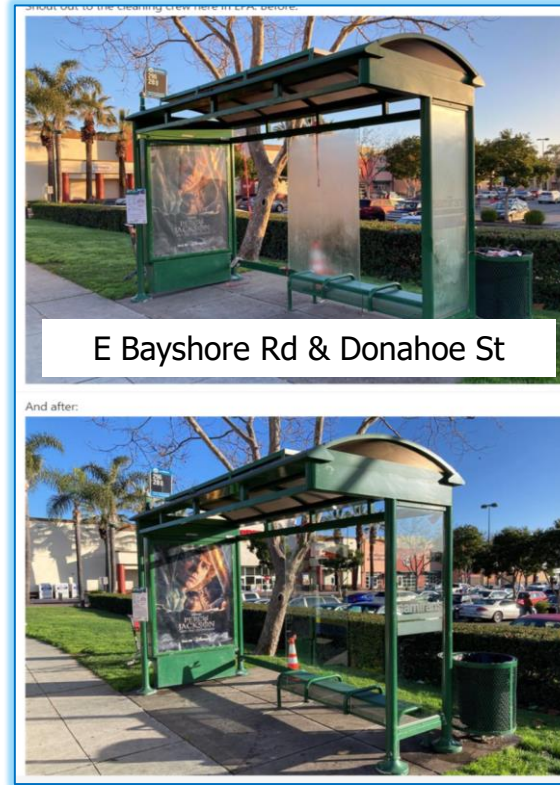
- Bus Stop Improvement Plan: Analysis & Implementation
- RidePlus Rider Experience Survey Pilot
- Employee 'Ride Along' project to assess stop and journey experiences

Signage, Communication, and Outreach

- Improved Wayfinding signage (Regional transit partnership)
- Ambassador multilingual outreach for Reimagine SamTrans campaigns

Potential Pilots* Station Experience

- Beauty in Transit: Community art for colorful commutes*
- Station Community Events*



*Pilot potential still in discovery mode & would need approvals/ budget assessment

Digital Improvements

Customer Planning and Journey

- New SamTrans Real-Time Service Alerts: Text & Email
- Trip Planning: Enhancing digital station maps to display amenities and regional transit connections
- Potential for regional MTC mobile app experience

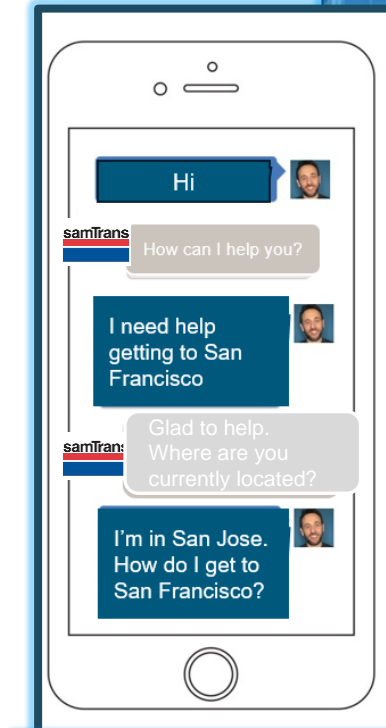
Customer Service and Self-Help

New Customer Service tool (CRM) to provide live chat and email for Customer Support

- CRM to provide AI based self-help when customers are viewing SamTrans website or mobile app

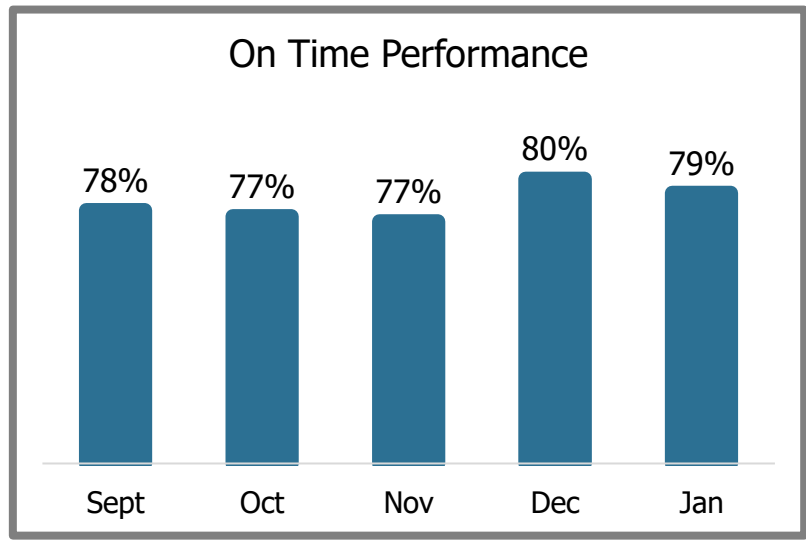
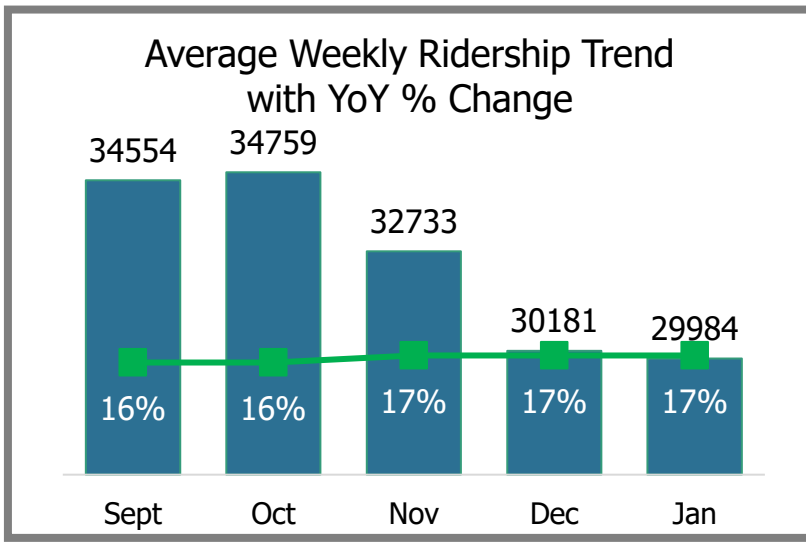
Community Building and Feedback

- New 'Discord' social platform to engage customers and community
- SamTrans Online Store Support



Customer Experience Metrics

- On Time Performance
- Weekly Ridership
- Complaints per 100k boardings
- Satisfaction Score
- Resolution Time
- Ticket Sales



Customer Satisfaction

97.5%

2.2% ▲

Complaints

Complaints per 100k boardings

9%

1.9% ▲

Resolution Time

34 minutes

1.4% ▼

Timeline

- MTC regional wayfinding committee kicks off
- Reimagine SamTrans III planning

Jul-Dec 2023

Jan- Jun 2024

- Ambassador Outreach for Reimagine SamTrans
- Employee ride alongs to assess station & stop experiences
- RidePlus Rider Experience Survey Pilot
- Launch new 'Discord' social platform
- New SamTrans Online Store full launch
- Bus Stop Improvement Plan: Stakeholder Comment
- Bus Stop Improvement Plan: Present to Board for Adoption
- Continuing: MTC regional wayfinding project

- Pilot New SamTrans Service Alerts (Email & Text)
- Bus Stop Improvement Plan: Initiate coordination with jurisdictions on near-term implementation
- Ambassador Outreach for Reimagine SamTrans
- IT implementation of Customer Service Tool (CRM)
- Continuing: MTC regional wayfinding project

July-Dec 2024

Jan-Jun 2025

- Launch live chat and email as customer service channels
- Launch self-help chat (via AI): Assists customers viewing SamTrans website or mobile app
- Launch Customer Satisfaction Survey for customers who contact the CS Team for support
- Bus Stop Improvement Plan: Implementation of Near-Term (CIP)
- Continuing: MTC regional wayfinding project

Marketing | Research | Outreach | Promos

Atmospheric Campaigns: Building the Brand

Activation Marketing: Driving Immediate Action

Affiliate (B2B) Marketing: The Way2Go Pass



Robert Casumbal | Director, Marketing

Vacant | Manager, Ad Revenue & Partnerships [NEW!]

Julian Jest | Manager, Market Research

James Namba | Marketing Specialist

Manny Ojeda | Marketing Specialist [NEW!]

Peter Tallo | Market Research Temp [NEW!]



Building the Brand: Atmospheric Campaigns

- Ridership growth through brand campaigns that **situate SamTrans competitively and generate atmosphere**; this is where SamTrans promotes new service and promotes its bona fides.
- This includes recruitment marketing designed to show off who we are, what we stand for, and the **strength of the brand**.
- "Always on" marketing efforts like the "SamTrans Means San Mateo" campaign will **center on the customer** and preemptively answer two key questions: "Where can I go, and is SamTrans for me?"
- Traditional and digital media buys make up **the tactical wing** of atmospheric campaigns.



- *SamTrans means **Live Music**.*
- *SamTrans means **Great Food**.*
- *SamTrans means **Adventures**.*
- *SamTrans means **Nightlife**.*
- *SamTrans means **Family**.*
- *SamTrans means **Business**.*
- *SamTrans means **San Mateo**.*



Activation Marketing: Driving Immediate Action

- Ridership growth through **creative activations of existing assets**, delivering earned media and engagement with new communities.
- Our most valuable assets for activation marketing **are the buses themselves** – and bus stops.



Affiliate Partnerships: Way2Go

- Ridership growth through promotion of specific fare products to affiliates, i.e., **partnerships with organizations that align with target consumer segments**. This is the backbone of SamTrans' business-to-business (B2B) marketing strategy.
- Manager of Ad Revenue and Partnerships position **expected to be filled** by mid-April, 2024.



SamTrans Priorities	Q1			Q2			Q3			Q4		
	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Marketing Campaigns												
HR Recruitment - Mechanic "Gear Up!" (Taylor/Robert)								2/19				
HR Recruitment - Operator "Superhero" (Robert)								2/1				
Route EPX (Robert)								2/11				
Ride Plus - Market Research (Julian)												6/15
Destination "SamTrans Means San Mateo" (Manny, Robert)										4/1		
Clipper START w/ MTC (Lysa, Robert)							1/4					
Ride Plus - Free Promo ends 2/10 (Robert)								2/10				
Ride Plus - Phase 2 - Clipper (Robert)								2/11				
Paratransit Same-Day Service (6-month Pilot) - Market Research						12/1						6/1
"SamTrans, Reimagined" Project Conclusion Campaign (TBD)												
ZEB - FCEB/BEB - new hydrogen/battery (TBD)												
Youth Campaigns												
Summer Youth Pass 2024 (Manny, James, Robert)											5/1	
Youth Unlimited (Lisa Chan, Robert)												
Youth Outreach (Lisa Chan, Manny)												
Contract Services												
Bus Mechanic Bus Wrap - Lamar Wrap (Cheri, Carl)											5/1	
Juneteenth (Cheri, Carl)											5/30	
Art Takes A Bus Ride AdCard/Wrap (Cheri, Classic Graphics)											5/30	
Pride Parades - HMB, SF - Lamar Wrap (Carl)												6/1
Bus Operator/Mechanic of the Year AdCard (Cheri)												6/1
30/35/40 Year Awardees AdCard (Cheri)												
Día de los Muertos - Lamar Wrap (Carl, Cheri)												
Holiday Bus Wrap - Classic Graphics (Cheri)												
Lunar New Year - Lamar Wrap (Carl, Cheri)								2/2				
Online Store (Robert, Carl)						12/15						
Misc. Notices/Ads/Invoices (James)												

FY24

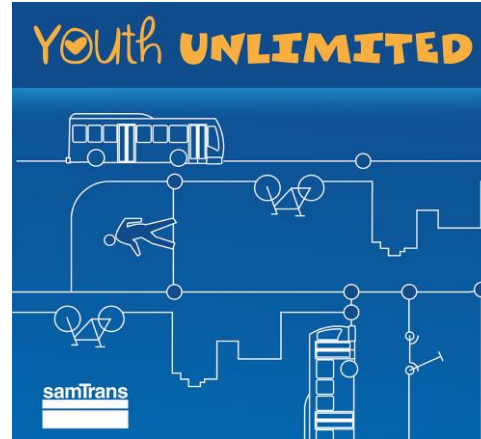
PREP

LAUNCH

FLIGHT

Marketing & Promotions: Beyond FY24

- Recruitment Promos & Bus Wraps (2024-2025)
- Youth Campaigns (Fall 2024)
 - Summer Youth Pass
 - Back to School
 - Youth Unlimited Pass
- SamTrans: Reimagined (Fall 2024)
- Holiday Bus Wrap (Winter 2024)
- NEW! Black History Month Bus Wrap (Spring 2025)



Data: Marketing Budget and ROI

- Marketing adheres to the ROPES development pathway:
Research, **O**bjectives, **P**rogramming, **E**valuation, and **S**tewardship.
- For evaluation, we:
 - Determine ROI using the standard formula, and
 - Evaluate campaign effectiveness using regression analysis where possible.
- Ensures an accurate, comprehensive, and actionable understanding of campaign performance and impact.
- This approach will facilitate data-driven decision-making and enable the District to optimize marketing efforts.





Questions?