**Customer Effort Score – Survey Template**

July, 2020

* NOTE: INTERNAL/PROGRAMMING INSTRUCTIONS SHOWN IN CAPS
* ALL QUESTIONS ARE MANDATORY UNLESS OTHERWISE SHOWN

**Email Invitation**: [TO BE CUSTOMIZED TO AGENCY]

[INSERT AGENCY LOGO OR BANNER HERE]

Subject Line: Have you used transit in the last 3 months?

Dear [CUSTOMER OR CUSTOMER GROUP],

If you’ve used transit in the last 3 months, including [LIST MODES AND SERVICES HERE] we want to hear from you!

This survey should take approximately [XX] minutes to complete, and will remain open until end of day [**DATE**]**.**

Sincerely,

[AGENCY OR SURVEY TEAM]

**Questionnaire:**

[Screener question]

S1. Have you used any of the following transit services in the last 3 months? (*Select all that apply*) [To be customized to agency]

1. [Agency] website

2. 3rd party websites (e.g. – Google, Bing, etc.)

3. Smartphone applications (e.g. – Google maps, Transit App, etc.)

4. SMS alerts

5. Social media

6. Signage at transit stops, stations and exchanges

7. Other \_\_\_\_\_\_\_\_\_\_\_.

8. None of the above [EXCLUSIVE]

DQ. [DISPLAY IF NONE OF THE ABOVE IN S1] Thank you for your interest, but to qualify for this survey you need to have used transit in the last 3 months. You may now close this browser window. [CLASSIFY AS DISQUALIFIED]

On this and the following screens, we will ask about different aspects of your transit travel experience over the last three months.

**I. Planning Your Transit Trip:**[SHOW Q1 AND Q2 ON SAME SCREEN]

Q1. To begin, please tell us what services, websites, or Smartphone apps you used to plan your transit trips? (*Please select as many as apply*) [TO BE CUSTOMIZED TO AGENCY]

1.

2.

3.

4.

5.

6. Other – Please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Not applicable [EXCLUSIVE]

Q2. Thinking about your travel in the past 3 months, how easy or difficult was it **to plan your trips on transit**?

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Not applicable

**II. Purchasing Your Fare:**

[SHOW Q3-Q5 ON SAME PAGE]

Q3. What was the main method of payment that you used in the past 3 months to pay for your transit fare? (*Please select one response*). [TO BE CUSTOMIZED TO AGENCY]

1.

2.

3.

4.

5.

6. Other Please specify: \_\_\_\_\_\_\_\_\_\_\_\_

7. Don’t know

8. I have not bought transit fare in the past 3 months

Q4. How easy or difficult was it **to purchase your transit fare**?

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Don’t know

Q5. Generally, how easy or difficult is **the fare system to understand**? (i.e., How fares are determined? What fare to pay?)

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Don’t know

**III. Station/Stop/On board Experience:** [SHOW Q6-Q11 ON SAME PAGE]

Q6. How easy or difficult was it **to** **locate and access the correct platform or bus stop**?

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Don’t know

Q7. Considering the different modes of transit you used over the past three months, how easy or difficult was it **to find out when your transit vehicle would arrive?**

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Don’t know

Q8. How easy or difficult was **getting on board transit vehicles**?

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Don’t know

Q9. How easy or difficult was it to **hear or see when you were approaching your destination**?

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Don’t know

Q10. How easy or difficult was it **to transfer between bus routes/rail lines/transit modes?**

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Don’t know

Q11. How easy or difficult was it **to get help when needed during your transit journey**?

1 Very easy

2 Somewhat easy

3 Neither easy nor difficult

4 Somewhat difficult

5 Very difficult

6 Not applicable

**IV. Summary** [SHOW Q12 AND Q13 ON SAME PAGE]

Q12. What was the **most difficult** part of your transit journeys in the last 3 months **and why**?

(***Select up to three responses***). [PROGRAMMER: MAX 3 RESPONSES]

1 Planning your trips on transit (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2 Purchasing your transit fare (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3 Understanding the fare system (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4 Locating and accessing the correct platform or bus stop (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5 Finding out when your transit vehicle would arrive (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6 Getting on board transit vehicles (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7 Hearing or seeing when you were approaching your destination (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8 Transferring between bus routes/rail lines/transit modes (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9 Getting help when needed during your transit journey (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

10. Other – Please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

11. None of the above [EXCLUSIVE]

Q13. What was the **easiest part** of your transit journeys in the last 3 months **and why**?

Please answer why in the adjacent text box.

(***Select up to three responses***). [PROGRAMMER: MAX 3 RESPONSES]

1 Planning your trips on transit (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2 Purchasing your transit fare (why?)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3 Understanding the fare system (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4 Locating and accessing the correct platform or bus stop (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5 Finding out when your transit vehicle would arrive (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6 Getting on board transit vehicles (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7 Hearing or seeing when you were approaching your destination (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8 Transferring between bus routes/rail lines/transit modes (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9 Getting help when needed during your transit journey (why?) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

10. Other – Please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

11. None of the above [EXCLUSIVE]

[OPTIONAL FOR SOFT LAUNCH AND TESTING]

Was there anything about the survey that you found confusing or difficult to answer? (*Optional*) [OPEN-ENDED QUESTION – NOT CODED]

Just before we finish, is there anything else you would like to share with us on any of the topics covered in this survey? (*Optional*) [OPEN-ENDED QUESTION – NOT CODED]

[INSERT DEMOGRAPHIC QUESTIONS HERE]

Closing Screen: Those are all our questions. Thank you for your participation!

You may now close this browser window.

[CLASSIFY AS COMPLETED INTERVIEW]