



Customer Service and Operations Committee

Board Information Item IV-A

April 10, 2014

Public Outreach and Customer Research

Washington Metropolitan Area Transit Authority
Board Action/Information Summary

Action Information

MEAD Number:
200701

Resolution:
 Yes No

TITLE:

Public Outreach and Customer Research

PRESENTATION SUMMARY:

Staff will provide an overview of WMATA's customer research program to the Customer Service and Operations Committee.

PURPOSE:

- Provide an overview of Metro's customer research program
- Review efforts to ensure low-income, minority and Limited English Proficiency customers are represented
- Discuss industry best practices and customer research next steps

DESCRIPTION:

Metro's Office of Customer Research (RESR) is charged with gathering and communicating customer opinions to improve Metro's services and programs, and providing decision-makers with customer input.

Key Highlights:

- Rail, bus, and paratransit customers have direct input into Metro decision-making through WMATA's customer research program.
- Metro uses quarterly phone surveys to measure customer satisfaction and the customer satisfaction index is reported publicly through "Vital Signs."
- Regular RESR customer reports help operating departments remedy issues arising in the system.
- Metro uses a range of research strategies to ensure that all of its customers are represented, including low-income, minorities, and customers with limited English proficiency.
- A "Public Participation Plan" (PPP) is being developed to improve two-way communication with customers and boost inclusiveness, diversity and accessibility whenever outreach activities are conducted.

Background and History:

The first "Voice of the Customer" survey results were reported in the third quarter of Calendar Year 2012. The first few surveys were conducted to establish a better

understanding of our Customer Satisfaction baseline levels and then, in Calendar Year 2013, the customer service key performance indicator (KPI) was set at 84% for both bus and rail.

The quarterly findings are reported to rail and bus operating groups so they can address problem areas identified by customers and prioritize their focus and attention.

WMATA's Executive Leadership Team (ELT) and leadership from Bus and Rail operations participate in regular Customer Service meetings, where Customer Satisfaction scores are reviewed and the key drivers of satisfaction and dissatisfaction are discussed. Mystery Rider results are also presented at the meeting, as is feedback from the Customer Call Center.

The research results are then used to establish specific actions that front line employees can take to address customer concerns. For example, action items developed for the General Manager/Chief Executive Officer's Customer Service Action Plan are often based on research findings.

Discussion:

Metro's Office of Customer Research uses a number of different strategies to gather customer input and improve decision-making throughout the Authority.

Overview of Research Program

The following is an overview of WMATA's program of research projects and an explanation of how each contributes to our understanding of customer needs and perceptions.

Voice of the Customer survey: A quarterly study of bus and rail passengers. Each quarter, approximately 770 customers (385 bus/385 rail) are administered a 17-minute phone survey. Metro's vendor uses randomly generated landline telephone numbers, supplemented by lists of cell phone numbers, to ensure we are sampling all demographics, including low-income customers and younger customers who we know rely more heavily on cell phones.

To be eligible for the survey, respondents have to indicate they have used Metrobus and/or Metrorail in the past 30 days. The study covers topics such as reliability, customer service, and satisfaction. Overall findings are segmented by demographics, jurisdiction, and station (rail) line.

The "Voice of the Customer" survey provides a scientific method using representative sampling for gauging customer opinion, and provides a mechanism to identify areas where improving service could maximize customer satisfaction.

The following are the specific categories covered in the survey:

- Reliability, likelihood to recommend, and satisfaction with Bus and Rail
- Frequency and time of ridership on Bus and Rail

- Trip planning tools used to plan most recent trip and their satisfaction levels with the trip planning tool, reliability of planning tools (for Bus and Rail)
- Metrobus:
 - Bus stops – signage, cleanliness, safety and security at the stop
 - Buses – cleanliness of bus, safety and security on the bus, clarity of announcements on the bus
 - Bus driver – courtesy, information, approachability
- Parking:
 - Safety and security
- Metrorail:
 - Rail stations - electronic signage, cleanliness, safety and security, clarity of announcements, climate control
 - Rail cars - cleanliness, safety and security onboard, clarity of announcements, onboard climate control, smoothness of the ride, ride quality.
- Station Manager - knowledge, courtesy, approachability
- Transit Police - knowledge, courtesy, approachability
- Fares – How fares for last trip were paid, satisfaction with fare machines, ease of fare machine use, satisfaction with SmarTrip® card
- Demographics – age, income, education, race/ethnicity, jurisdiction

MetroAccess Customer Satisfaction: Semi-annual survey designed to identify operational, procedural, and customer service aspects that impact levels of satisfaction. To be eligible for the survey, respondents have to indicate they have used MetroAccess in the past 30 days. Each wave, 400 MetroAccess customer are administered an 8-minute phone survey.

Topics covered in the survey include:

- Overall satisfaction,
- Quality of service,
- Drivers – courtesy and helpfulness,
- Vehicles – comfort and cleanliness,
- Service attributes that are most important to customers (ease of making a reservation, getting to your destination on time, driver courtesy, safety during trips, etc)

A new MetroAccess customer satisfaction question was added to the survey this past wave. We found MetroAccess customers, like our fixed route customers, have very long memories. So, when we asked them about overall customer satisfaction, they would tell us about their experiences 10 years ago rather than their recent experiences. We added to the new customer satisfaction question to have them focus on their most recent experience. This allows us to get a better assessment of our current performance rather than our past performance.

MetroAccess Knowledge and Usage: Quarterly phone survey designed to understand how MetroAccess customers use the service. If the respondent is unable to answer our questions over the phone due to hearing impairment or other disability, we ask their caregiver to relay or provide responses on their behalf. Metro notes that visually

impaired riders typically are able to participate as the interaction is verbal and does not require pushing buttons for responses.

This research measures:

- Perceptions of services MetroAccess is obligated to provide based on laws and regulations.
- Familiarity and understanding of other (regular route) Metro services, and awareness of other transportation services.

The specific survey questions are:

- How are they using the service (destination/purpose)
- Why they use MetroAccess rather than Metrobus or Metrorail
- Their responsibilities as MetroAccess riders (be ready for pick-up throughout the 30 minute window, paying exact fare, etc.)
- Assess what they know about the service MetroAccess is mandated to provide
- Familiarity with travel training program, EZ-Pay, Free ride program, eAlerts
- Usage of travel training and whether the training has decreased their usage of MetroAccess
- Usage of other transportation services
- Preferred method of contact

Mystery Rider: This program uses a local vendor to perform anonymous inspections of the system. By traveling as any customer would and utilizing a prescribed inspection checklist, the vendor's agents examine many factors involved in daily service delivery – from equipment performance to station cleanliness, and interactions between customers and Bus, Rail and MTPD employees. On the rails, mystery riders assess the train ride experience, station mezzanines and platforms. Mystery riders also assess the buses and bus stops. They are Metro's version of "secret shoppers" that give us an objective, third party assessment of how the system is working and provide an early warning system to identify issues that Metro can remedy before they impact customers.

Call Center post-call survey: Prior to speaking to a customer service representative, each customer that contacts the customer relations or customer information call centers are asked to stay on the line after the call to participate in a two-minute survey regarding their call center experience. At the end of their call, the callers are transferred to the survey. In total, respondents are asked to answer 6 questions via an interactive voice recognition system (IVR) where callers push buttons to respond to questions. The results of the survey are reported quarterly to CSVC management and used as a quality control tool.

Qualitative Research

Focus Groups: WMATA has been conducting qualitative research for several years with both riders and non-riders throughout the region. Qualitative research is conducted on an as-needed basis to provide customer input on a wide variety of topics. The main format used to collect qualitative research is focus groups, which are typically composed of one moderator and eight to 10 respondents from a variety of backgrounds and jurisdictions.

- **NEPP fare gates** - Non-ADA Metrorail customers & ADA Metrorail customers (including members of the general public, the Riders Advisory Council and the Accessibility Advisory Committee) participated in fare gate focus groups. Participants entered/exited each fare gate (where possible) and evaluated each gate. The fare gate focus groups were first conducted in May 2012 to evaluate early versions of the designs. WMATA revised or made changes to the fare gate designs based on the results of the 2012 study. The new/revised designs were then tested again in June 2013.
- **7K railcar design** - In 2012, focus groups were held to obtain Metrorail customers' feedback on a full mock-up of the new 7000 Rail Car Series. Specifically, the research was designed to assess customers' reactions to the prototype rail car and obtain feedback regarding features of the car's exterior and interior design, such as placement of hand holds, seat design and cushioning, lighting and flooring. The participants in the 2012 study also participated in two prior focus groups that evaluated earlier versions of the seat and interior designs of the rail car.
- **Momentum** – In December 2012, focus groups were held to help define priorities for Metro's investment in Momentum strategic plan. 133 individuals participated in four forums, with one conducted in each jurisdiction plus an additional Spanish-speaking group held in the District. Participants for the four forums were recruited from the general public in the WMATA service area. Recruitment was done through an advertisement on Craigslist, emails to a targeted group of previous focus group participants, and outreach to community organizations. A little more than 700 people applied for the 133 slots that were available, allowing for the selection of participants who were fully representative of the broad diversity of Metro customers.
- **Employee focus groups on customer service** – Focus group research was recently conducted to help identify opportunities for and barriers to motivating employee delivery of high quality customer service. Results of the research will be used to develop strategies to improve tools, training and management to improve customer responsiveness.

Call Center call-back program: Each month, Metro's call center employees call approximately 100 customers chosen at random who have recently contacted the center with a complaint. Metro employees inquire if the customer's issue has been resolved to their satisfaction and if there is anything else the Metro representative can help them with. Feedback from these calls is provided to Metro leadership. Typically, 99% of call backs find the customers are satisfied and in only 1-2% of cases is a new issue identified for follow up.

MindMixer: MindMixer is an online community engagement tool that allows us to post questions and gather ideas, comments, and votes, as well as enables the community to engage with one another. The value is really about posting open ended questions that allow for brainstorming and idea improvements from the community.

Metro's Planning team first launched MindMixer in September 2012. Since then, 1,300 people have participated in forums on three topics:

- Momentum: three different rounds of questions, total of 16 questions
- Silver Line Map: two different rounds of questions, total of three questions
- FY15 Budget: one round of questions, total of six questions

Online Research

Online Surveys: Online surveys are administered two ways: online and tablet based (using an offline survey application). The surveys include a number of multiple choice and open-ended questions, and the surveys generally are publicized through multiple channels, including through the media, and remain open to the public for two to four weeks. Metro conducts a wide variety of outreach to encourage participation in the online surveys, however it is important to note that the feedback gathered reflects only those who choose to respond to the call for input.

- **FY15 Budget and Fares survey** conducted in January and February 2014 -- 6,575 people participated, nearly double the number who participated in the last budget survey in 2012. 43% of respondents self-identified as minorities, while 17% volunteered that they live in households with incomes under \$35,000 annually.
- **The Silver Line survey** was conducted in 2013. The survey was sent out to rail customers asking about potential usage of the Silver Line. In total, 7,729 people participated. 34% of respondents self-identified as minorities, 12% indicated they live in households with incomes under \$35,000 annually.
- **The Silver Line station naming survey** received the highest number of participants with 16,200 responding to the survey. For each of the 11 Silver Line stops, respondents could choose from three station name options provided or suggest another name.

Onsite Research

O/D Studies: The origin and destination studies help us determine where our customers live and provide the most scientific approach to estimate ridership at rail stations and on bus routes. The study is administered by handing out surveys in rail stations and on bus routes at different times during the day. Customers who receive a survey handout have the option to fill out the paper survey, call in answers, or complete the survey online. Some customers may end up taking the survey more than once because this is a survey of trip making patterns, not of individuals. The Metrorail O/D survey is distributed to about 1/3 of all weekday Metrorail passenger trips, with a response rate of 25 percent.

The data is gathered to meet compliance with Title XI requirements and to help determine jurisdictional subsidies, as well as to support operating and planning activities for Metrorail and Metrobus. The Metrorail O/D study is conducted once every five years, and the last study was conducted in 2012. The last Metrobus O/D study was conducted in 2008 – with a new Metrobus O/D study scheduled to begin soon. In coming years, the Metrobus O/D study will become a rolling survey, with approximately 1/3 of all bus routes surveyed each year.

Reaching Under-Represented Populations

To ensure that customer input is inclusive, Metro does the following:

- Research materials are translated into multiple languages, including Chinese, Vietnamese, Korean, Amharic, and Spanish. The customer satisfaction survey can be administered in Spanish when requested, and at least one Spanish-speaking focus group is typically conducted for projects.
- We use both cell phone and land line numbers when we conduct surveys. The cell phone numbers help us reach low-income residents who may not have a landline, and younger customers who also tend to rely on their cell phones for communicating.
- We ask demographic questions when we conduct surveys so we can ensure the final results include racial/ethnic diversity, economic diversity, and jurisdictional diversity that is representative of the actual Metro ridership. Once a survey has been completed and we know how many people of certain demographics have responded, (for example, how many minority customers or how many low-income customers), a formula is created so that the proportions of different types of respondents match the known population figures. If we've over-sampled or under-sampled a particular population, weighting techniques allow us to adjust final results for more accurate reporting.
- Individuals participating in our focus groups are recruited from a variety of income, race and gender backgrounds. Respondents are also recruited to ensure all jurisdictions are represented in each project. All facilities used to conduct focus groups are Metro accessible (no more than 3-4 blocks from a Metrorail station). We also typically include at least one Spanish speaking group in each wave of focus groups.
- In addition, we have started bringing computer tablets to rail stations, bus stops, Community Based Organizations (CBO) meetings, and public hearings where we can reach a higher percentage of Title VI populations and engage them in our research activities.

Next Steps

Metro is in the process of developing a "Public Participation Plan" (PPP) that will be used as a framework for outreach whenever WMATA staff needs to engage the public. Our goal is to improve two-way communication and boost inclusiveness, diversity, and accessibility in these activities. We launched the "Speak Up! It's Your Ride" public outreach campaign and survey to learn how we can make it easier for customers to speak with us, and for us to reach them.

The creation of the PPP has provided an opportunity to evaluate and expand our customer research efforts. And even as the plan is still in development, we've started using new strategies to ensure the voices of low-income and minority customers are well represented in our research. Our effort is all about meeting people where they are, rather than expecting them to come to us.

Through outreach to CBOs and special language media, we are proactively seeking more participation from all communities where our customers live and work.

We are also looking at both private sector and public sector best practices for getting more reliable levels of response from hard to reach communities. One such practice is Paneling – or recruiting a panel of participants, based on select demographics, and incentivizing their participation (for example, with SmarTrip® cards).

FUNDING IMPACT:

There is no impact on funding.	
Project Manager:	Lynn Bowersox
Project Department/Office:	Customer Service, Communications and Marketing

TIMELINE:

Previous Actions	2012 - "Voice of the Customer" survey established
Anticipated actions after presentation	<p>Metro’s Office of Customer Research is currently planning for a number of research projects:</p> <ul style="list-style-type: none"> - Close Call survey (<i>underway</i>) - DC Age Friendly Survey (<i>underway</i>) - Public Participation Plan (<i>underway</i>) - Bethesda station remodel focus groups - SmarTrip Call Center satisfaction survey - Bus O/D study - Research on NEPP - Silver Line Awareness survey - Silver Line outreach - Silver Line Survey - Post-incident surveys - Youth outreach program metric

RECOMMENDATION:

This is an information item.



Washington Metropolitan Area Transit Authority

Public Outreach and Customer Research

Customer Service and Operations Committee

April 10, 2014



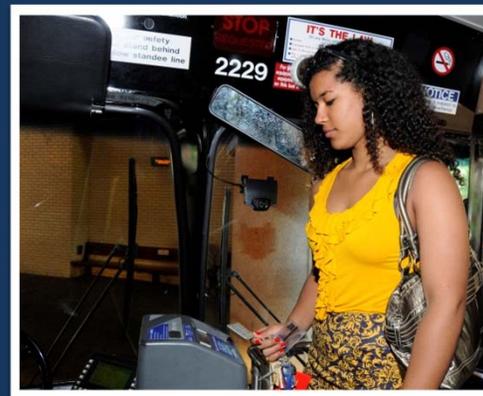
Purpose

- Provide an overview of Metro's customer research program
- Review efforts to ensure low-income, minority and Limited English Proficiency riders are represented
- Discuss industry best practices and customer research next steps



Research Tactics

- “Voice of the Customer” Survey:
 - Metrobus and Metrorail customers
 - Phone survey using landline and cell phone #s
 - Covers reliability, customer service and satisfaction





Research Tactics

- MetroAccess Customer Satisfaction Survey
- MetroAccess Knowledge and Usage
- Mystery Rider



- Focus Groups:
 - Fare gate design
 - 7K railcar design
 - Momentum funding priorities
 - Employee perceptions of customer service





Research Tactics

- Call Center
- Online Surveys
- Origin & Destination Studies
- Mind Mixer





Schedule/Internal Reporting

Quarterly reporting:

- WMATA Executive Leadership Team's Customer Service meeting
- Vital Signs Board presentation and public release
- Bus, Rail, MetroAccess departmental reports





Public Participation Plan

Your ride. Your voice.



Metro is more than just your bus or train, it's *your* ride and an important part of *your* quality of life. That's why it's important to make *your* voice heard on upcoming transit issues.

We want to do whatever we can to make it easy for you to participate. So please, take a moment to visit wmata.com/speakup and take the short survey!



wmata.com/speakup



Reaching Under-Represented Populations

"Voice of the Customer" survey

Calendar Year 2014, Quarter 1

- 52% Minority
- 9% Hispanic
- 18% Low-Income
- Jurisdiction:
 - 43% DC
 - 33% MD
 - 24% VA



Reaching Under-Represented Populations

- Translate research materials
- Utilize cell phone numbers
- Ask demographic questions; data weighted
- Recruit for focus groups
- Bring tablets to rail stations, bus stops and CBO meetings





Reaching Under-Represented Populations

Next Steps:

- Reach more Limited-English Proficiency riders
- Paneling



Best Practices





2014 Research Schedule

Projects Underway

- Close Call survey
- DC age-friendly survey
- Public Participation Plan survey

Upcoming Projects

- Bethesda station focus groups
- SmarTrip Call Center satisfaction survey
- Silver Line research
- Bus O/D study
- NEPP research
- Post-incident surveys
- Youth outreach metric