King County METRO

Summary of King County Metro's Results from the 2017 International Bus Benchmarking Group's Customer Satisfaction Survey

Including additional information from Metro's 2016 Rider/Non-Rider Survey

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King County METRO

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Executive Summary

King County Metro Transit (Metro) participated in the International Bus Benchmarking Group's (IBBG) 2017 Customer Satisfaction Survey. Fourteen IBBG member transit agencies from around the world conducted an online customer survey at the same time: from April 24 through May 21, 2017. Metro promoted the survey via our website, Facebook, tweets, email subscriber lists, and some business communications. Metro received more than 1,000 responses to the survey.

Some of the findings related to Metro:

- Compared to the other 13 worldwide IBBG organizations' respondents:
    - More Metro respondents are in the 50-65 age bracket
    - Fewer Metro respondents are in the 19-29 age bracket
    - Fewer Metro respondents report using the bus "very often"

- The three service quality areas of most importance to Metro respondents in 2017 are availability, time, and information.

- When asked about their willingness to recommend the bus, Metro respondents are more likely to be "promoters" and less likely to be "detractors" compared to all other IBBG members' respondents. Metro is the only IBBG member with more promoters than detractors.
    - 34% of Metro respondents are "promoters"—the highest among the IBBG members

Among the 19 service attributes studied, Metro received positive scores (greater than three on a five-point scale where five is "strongly agree" and one is "strongly disagree") on all but one attribute. The exception is the rating of "If there are problems, I can easily find an alternative route."

The percentage of Metro respondents who agree or strongly agree with an attribute statement (a score of four or five) is highest for:

- It is easy for me to get into and out of the bus (89%)
- The bus helps to reduce pollution (81%)
- It is convenient paying a fare (84%)
- Staff is well dressed (77%)

The attribute statements with the lowest percentage of Metro respondents agreeing with the attribute statement are:

- If there are problems, I can easily find an alternative route (28%)
- The bus gets me to my destination in good time (47%)
- The bus is quiet, well lit, ventilated and at an adequate temperature (47%)
- The seats are comfortable and there is enough space (48%)
- The buses are frequent (48%)

Compared to other organizations, Seattle-area respondents rate Metro:

- Higher on ease of entering and leaving the bus, environmental performance, ease of fare payment, staff appearance, staff helpfulness, and ease of finding general information

- Significantly lower on information about alternative routes, and somewhat lower on interior comfort, journey time, internal ambience, frequency of service, bus cleanliness, and information on how the buses are running

Some of these same attributes are measured in Metro's 2016 Rider/Non-Rider survey. In all cases, the IBBG survey results show lower satisfaction than the Rider/Non-Rider does. The wording, methodologies, and samples are different in the two studies, so different results are expected.

Background on IBBG's Customer Satisfaction Survey

The IBBG is a comprehensive program of benchmarking urban bus operations. Currently the group is made up of 14 medium and large bus organizations located around the world (listed in the Appendix A). The group is jointly owned and directed by the members, with project management, administration, and research carried out by the Railway and Transport Strategy Centre at Imperial College London.

Customer satisfaction—in other words, the extent to which organizations meet their customers' expectations—is an important indication of an organization's success and sustainability. Customer satisfaction should be included in any benchmarking exercise that participants use to understand their relative performance.

IBBG members agreed that directly comparing *their own* customer satisfaction scores with other agencies' scores in a benchmarking exercise would not be useful because of differences in:

- measured items
- definitions of items
- measurement methods (sample size, location, time, collection method, etc.)
- socio-political, structural, and cultural biases

Furthermore, a customer satisfaction survey is a subjective measurement, so it is less suitable for benchmarking than objective measurements.

Nonetheless, because of the importance of customer satisfaction, the IBBG members started a research project in 2009 to overcome these challenges. A pilot Customer Satisfaction Survey was conducted for all IBBG members.

After the success of the pilot, IBBG established a regular survey process. Member organizations agreed to annually post links to identical customer satisfaction surveys on their website homepages during the same agreed time period. The 2017 survey was the ninth.

IBBG Survey Methodology

The 2017 IBBG customer satisfaction survey included 26 questions:

- 19 questions grouped into eight attribute categories:

    - **Availability:** Bus reliability, convenience of routes/network, and service frequency

    - **Accessibility:** Ease to get on/off the bus, ease to move inside the bus, and the convenience of paying a fare/buying a ticket

    - **Comfort:** Cleanliness, ride comfort, internal ambiance, and seat availability/comfort

    - **Customer Care:** Staff helpfulness, staff appearance, ease of sorting out problems/complaints

    - **Information:** Availability and quality of general/scheduled information, real-time information, and information on alternatives during disruption

    - **Time:** Incorporates both journey time and punctuality (statement was "the bus gets me to my destination in good time")

    - **Security:** One question about feeling secure on the bus

    - **Environment:** One question about bus reducing pollution

- One general question on overall satisfaction
- One "net promoter score" question on likeliness to recommend the service
- One request to select the top three customer service areas/priorities
- Four demographic questions: age, gender, frequency of bus use, and primary trip purpose

The questionnaire was administered via www.surveymonkey.com

- Identical questionnaires for all participants were in local languages, each with a separate link.
- Metro provided links to English, Spanish and Chinese (traditional) versions of the questionnaire. Seven of Metro's surveys were completed in Spanish and 12 were completed in Chinese.

Metro directed respondents to the online survey through five types of collectors:

- Link on home page of the Metro website
- Direct email with a link
- Link on Facebook
- Link on Twitter
- Link on Instagram

Metro had 1,037 initial responses, and after data cleaning 989 responses remained.

Demographics of Respondents

The graphs below show the demographics for Metro's respondents and the other 2017 IBBG members' respondents.
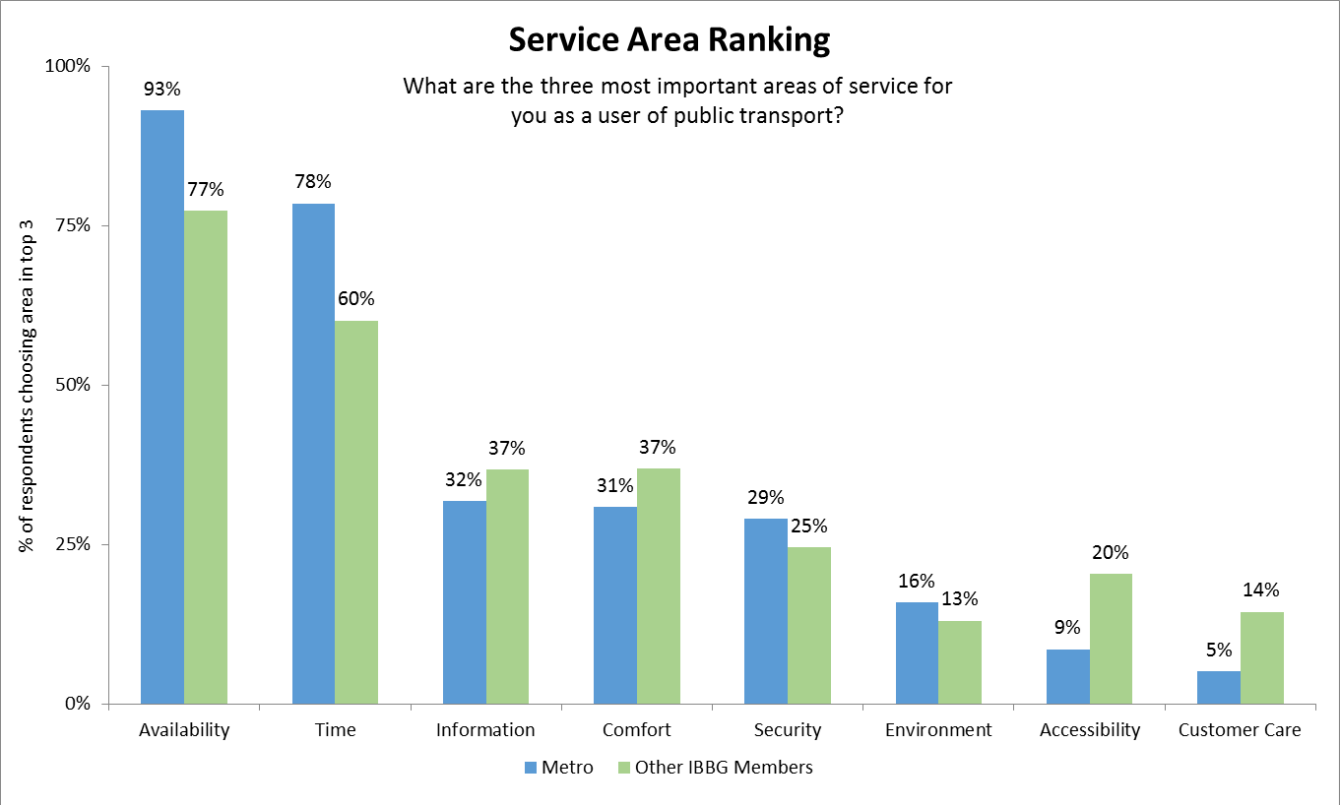
Compared to the other IBBG members, more of Metro's respondents are in the 50 to 65 age category (27% vs 16%) and fewer are aged 19 to 29 (18% vs. 34%). Also, fewer of Metro's respondents report using the bus "very often" (51% vs. 58%).
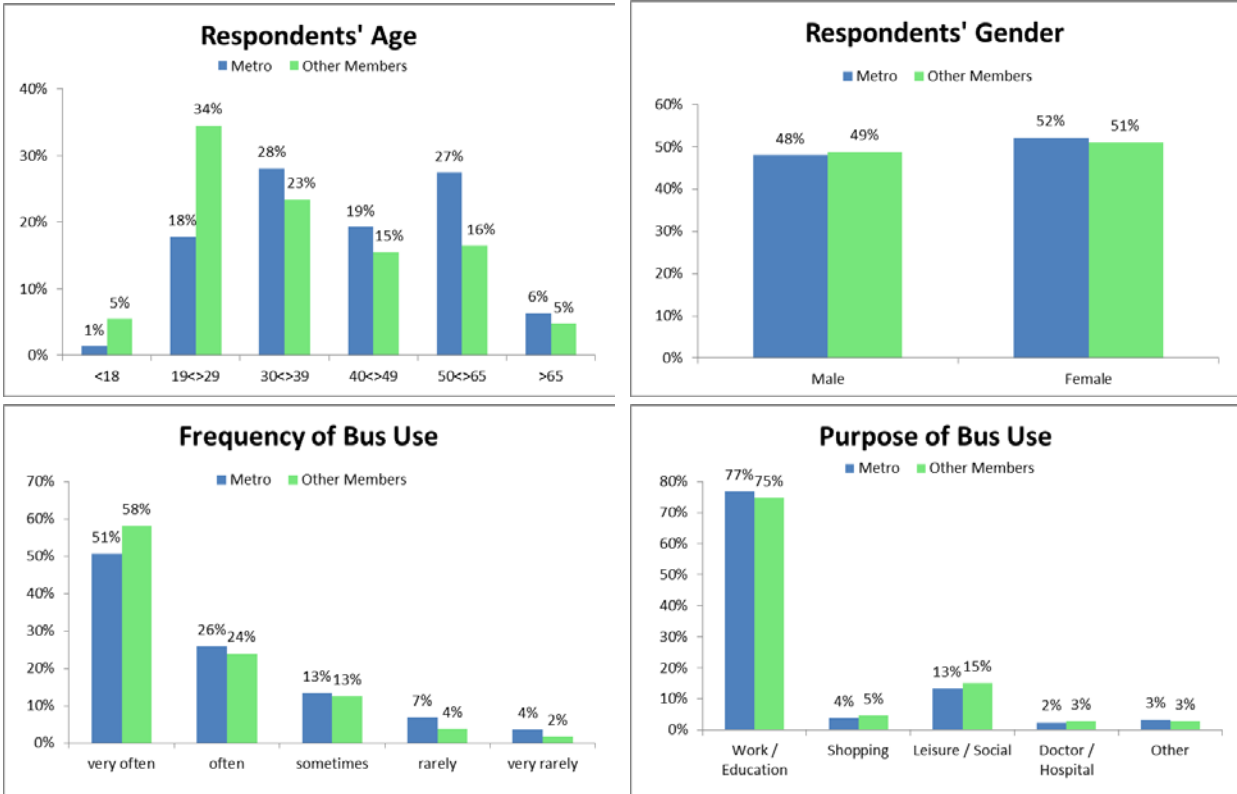
Service Area Priorities

Customer satisfaction research assesses both the level of satisfaction of the service areas and the importance of those areas for customers. To understand which areas of service quality are most important for customers, the IBBG survey included the question, "What are the three most important areas of service for you as a user of public transport?" Eight service areas were listed and briefly described: availability, accessibility, comfort, customer care, information, time, security, and environment.

In 2017, Metro's respondents' top three most important areas of importance are availability, time, and information. For all 14 IBBG communities, the most important quality area is availability, and the second most important area is time. The third most important quality areas are information or comfort, each chosen in half of the IBBG communities.

Service Area Ranking

What are the three most important areas of service for you as a user of public transport?

	Availability	Time	Information	Comfort	Security	Environment	Accessibility	Customer Care
Metro	93%	78%	32%	31%	29%	16%	9%	5%
Other IBBG Members	77%	60%	37%	37%	25%	13%	20%	14%

Metro's Top 3 Most Important			
based on % of Respondents who ranked service quality area in Top 3			
	Availability	**Time**	**Information**
Seattle Respondents	93%	78%	32%
Top 1 Most Important			
% of Respondents who ranked service quality area as Top 1			
	Availability	**Time**	**Security**
Seattle Respondents	68%	17%	5%

Besides availability, time, and information, comfort and security were also chosen as top-three areas of importance by a substantial number of Metro's respondents. While nearly 32% of Metro's respondents ranked information as a top-three area of importance, only 1% chose it as most important.
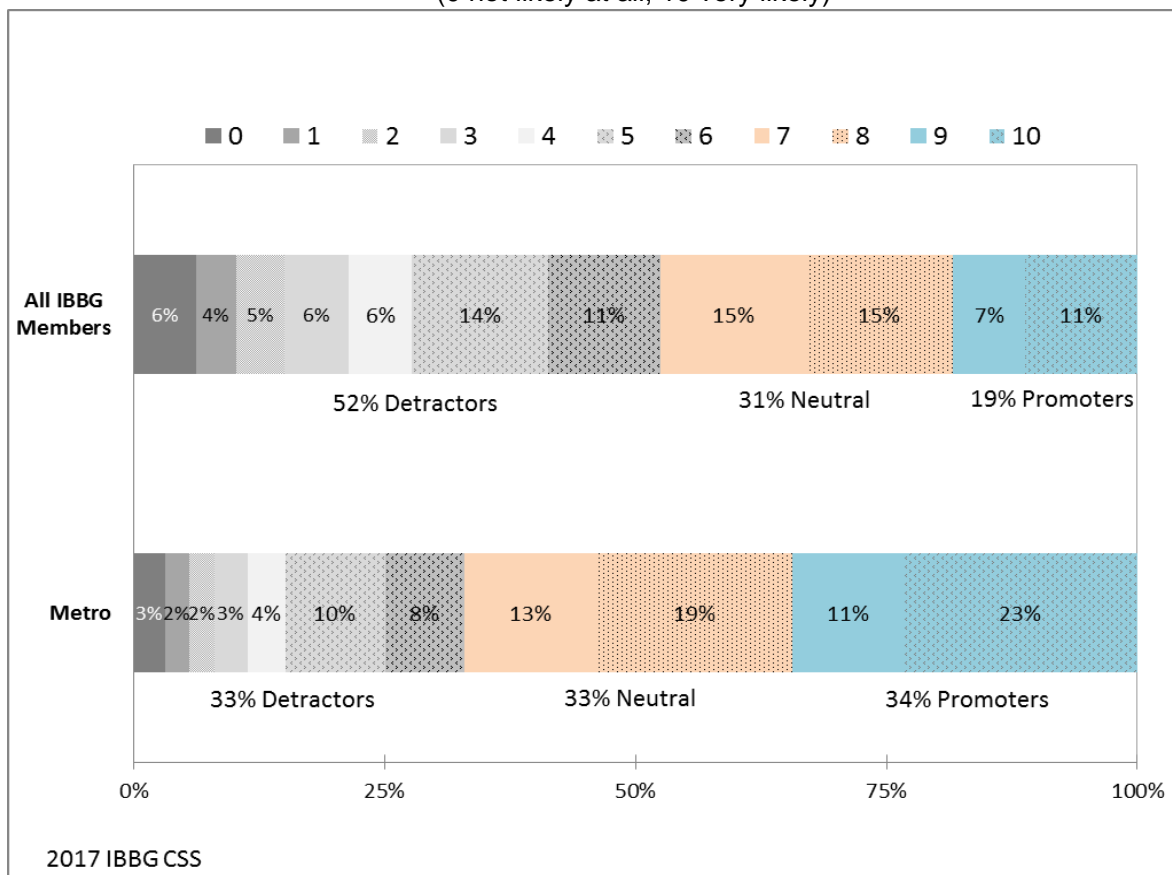
Net Promoter Score

The Net Promoter Score was developed by Fred Reichheld (*The Ultimate Question: Driving Good Profits and True Growth*), based around the question, "Please rate how likely you would be to recommend the service to a friend or family member (0 not likely at all, 10 very likely)?" Scores are then classified as promoters (9 and 10), neutrals (7 and 8), and detractors (0-6).

The chart below shows that Metro respondents are more likely to be promoters and less likely to be detractors compared to the scores of all IBBG members' respondents.

Distribution of Promoters, Neutrals and Detractors
How likely is it that you would recommend the bus service to a friend or family member?
(0 not likely at all, 10 very likely)

Legend: ■0 ■1 ■2 ■3 ■4 ■5 ■6 ■7 ■8 ■9 ■10

All IBBG Members:
6% | 4% | 5% | 6% | 6% | 14% | 11% | 15% | 15% | 7% | 11%
52% Detractors | 31% Neutral | 19% Promoters

Metro:
3% | 2% | 2% | 3% | 4% | 10% | 8% | 13% | 19% | 11% | 23%
33% Detractors | 33% Neutral | 34% Promoters

0%   25%   50%   75%   100%

2017 IBBG CSS

Thirty-four percent of Metro respondents are classified as promoters—**the highest among the 14 IBBG members**. Metro has equal-sized groups of neutrals and detractors (both 33%). Ten out of 14 IBBG members have less than 25% promoters. For five IBBG members, more than half of respondents are detractors.
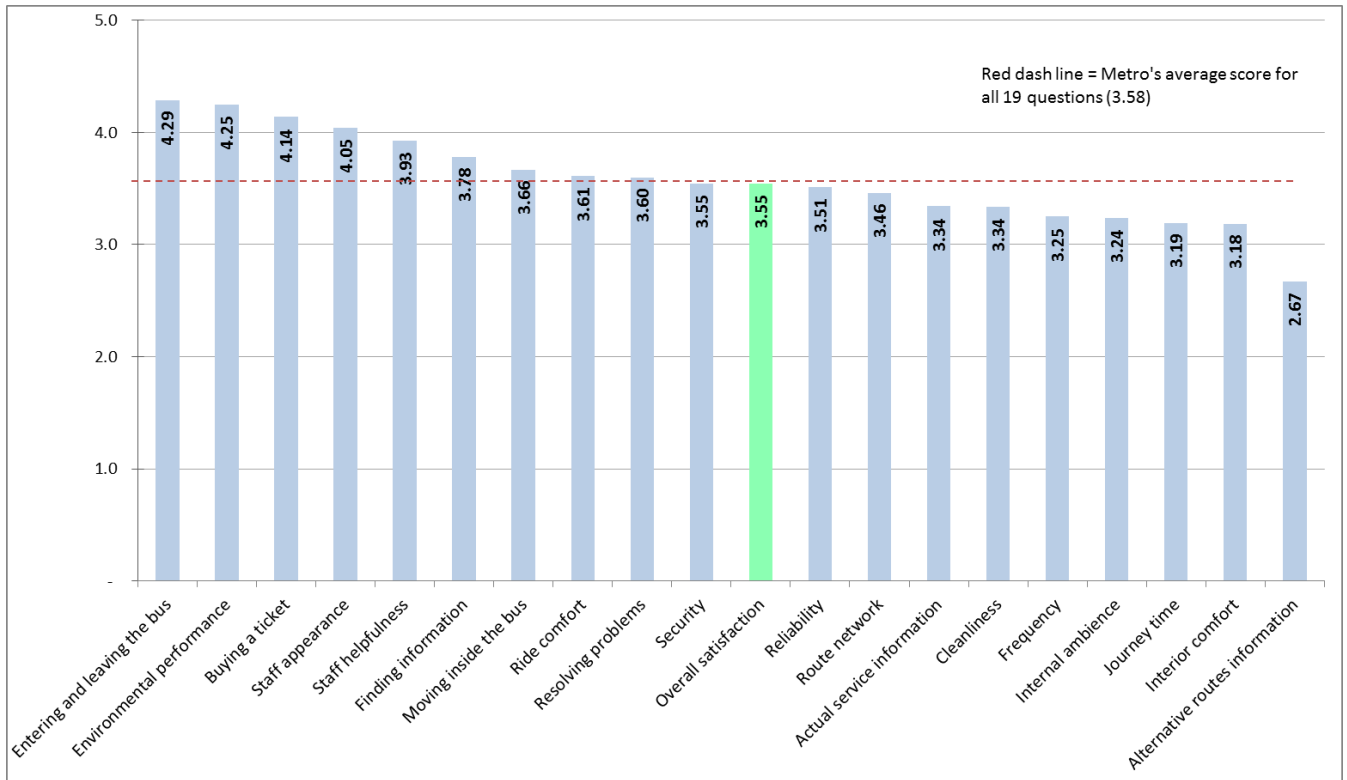
Absolute Customer Satisfaction Results

This section presents the absolute scores for each question asked.

The graph below shows Metro's 2017 results ranked from "most satisfied" to "least satisfied" for all 19 questions, with overall satisfaction shown in green. The average of all 19 questions is shown by the red dotted line, which can be used to distinguish above- and below-average aspects of service.

Satisfaction with Bus Services
Metro Scores

Red dash line = Metro's average score for all 19 questions (3.58)

Scores by category:
- Entering and leaving the bus: 4.29
- Environmental performance: 4.25
- Buying a ticket: 4.14
- Staff appearance: 4.05
- Staff helpfulness: 3.93
- Finding information: 3.78
- Moving inside the bus: 3.66
- Ride comfort: 3.61
- Resolving problems: 3.60
- Security: 3.55
- Overall satisfaction: 3.55
- Reliability: 3.51
- Route network: 3.46
- Actual service information: 3.34
- Cleanliness: 3.34
- Frequency: 3.25
- Internal ambience: 3.24
- Journey time: 3.19
- Interior comfort: 3.18
- Alternative routes information: 2.67

2017 IBBG Customer Survey

All of Metro's scores are greater than 3.0, except for the rating of "If there are problems, I can easily find an alternative route."
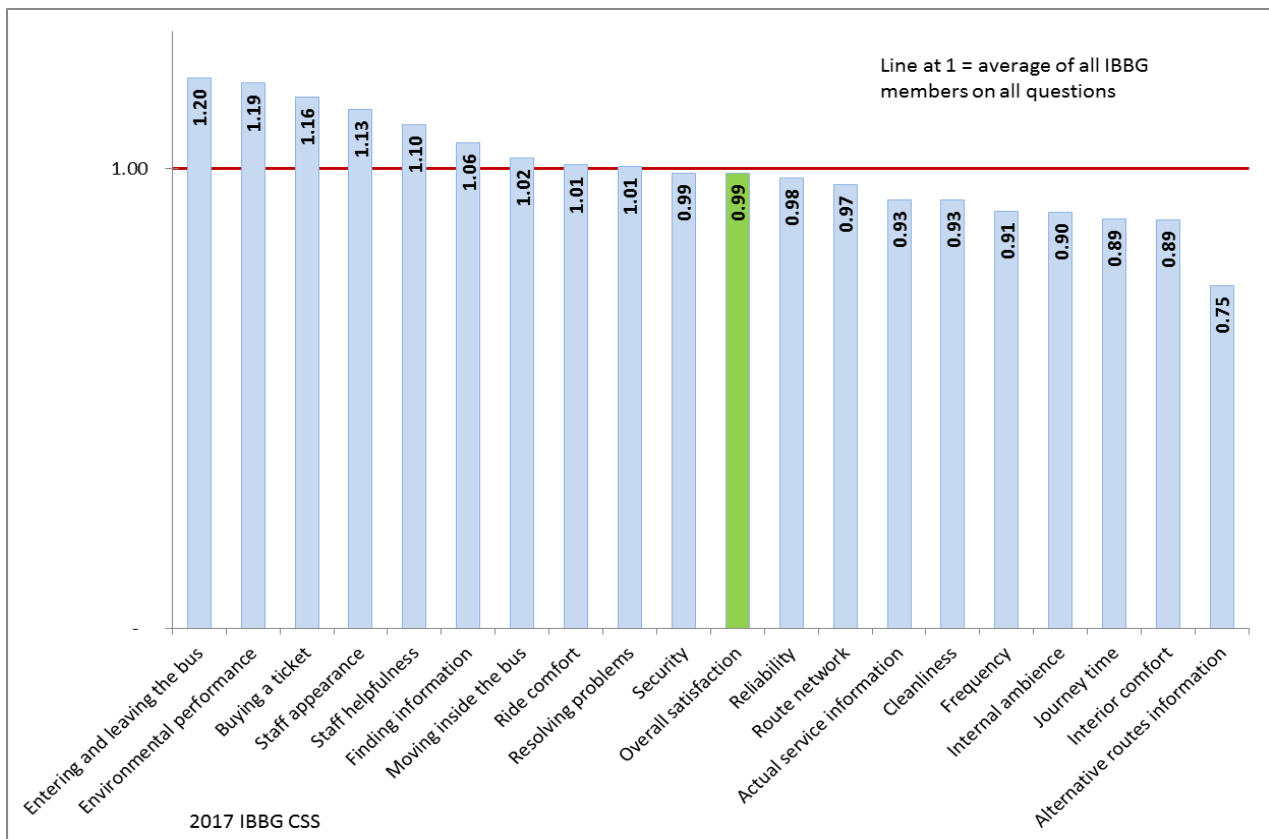
For Metro, the average score of the 19 individual questions, 3.58, is slightly higher (more positive) than the score on the overall satisfaction question (3.55, shown in green). This is true for 10 other IBBG members as well.

Relative Customer Satisfaction Results

Satisfying passengers can also be described as meeting passengers' expectations. An issue for benchmarking is that these passengers' expectations will differ from city to city, so to compare results, we normalize them:

- For each member, each question's score is divided by the member's overall average for all 19 questions to create a satisfaction index (normalized score).

- A satisfaction index will have a value around 1.0. A score of 1.0 means that the average score for that particular question equals the average score for all questions.

- A satisfaction index above 1.0 indicates that passengers are relatively more satisfied with this service quality aspect than other areas on average. A score that is greater than 1.0 indicates a good internal result.

- A score of 1.0 is the average of all IBBG members, so a statement with a score greater than 1.0 is also very good compared to peers.

Metro's Normalized Results

Line at 1 = average of all IBBG members on all questions

Category	Score
Entering and leaving the bus	1.20
Environmental performance	1.19
Buying a ticket	1.16
Staff appearance	1.13
Staff helpfulness	1.10
Finding information	1.06
Moving inside the bus	1.02
Ride comfort	1.01
Resolving problems	1.01
Security	0.99
Overall satisfaction	0.99
Reliability	0.98
Route network	0.97
Actual service information	0.93
Cleanliness	0.93
Frequency	0.91
Internal ambience	0.90
Journey time	0.89
Interior comfort	0.89
Alternative routes information	0.75

2017 IBBG CSS

The chart of normalized scores shows high ratings in the same areas that received high ratings in the absolute results, presented on page 7. This chart also shows that compared to the other IBBG organizations' respondents, Seattle-area respondents rate Metro:

- Higher on ease of entering and leaving the bus, environmental performance, ease of fare payment, staff appearance, staff helpfulness and ease of finding general information

- Significantly lower on information about alternative routes, and somewhat lower on interior comfort, journey time, internal ambience, frequency of service, bus cleanliness and information on how the buses are running.

How IBBG's Customer Satisfaction Survey Compares to Metro's Rider/Non-Rider Survey

Metro places high value on customer feedback. For more than 30 years, we have conducted an annual telephone survey of King County residents—the Rider/Non-Rider Survey (RNR). This survey has multiple objectives, but a large component of it is questions about satisfaction and the importance of various aspects of service. The table below provides information on how the IBBG and RNR surveys compare in terms of objectives, methodology and questionnaires.

	IBBG's Customer Satisfaction Survey	Metro's Rider/Non-Rider Survey
Objectives	For bus operators to understand their relative performance compared to IBBG peers in meeting customers' expectations in multiple service-quality areas	Tracks awareness and perceptions of Metro services among both riders and non-riders
	Allows operators to target those areas in which they underperform (relative to other operators)	Identifies and tracks demographic characteristics, attitudes, and transit use among riders and non-riders
	Provides bus operators with a customer satisfaction dataset that can be used to validate and/or complement their own customer satisfaction research	Provides insight about topics related to Metro's service, marketing, and communications strategies
		Provides a reliable measure of market share
Methodology	Self-selected respondents	Randomly selected respondents
	Respond to collector (link in email, on website, Facebook etc.)	Dual-frame (cell and land line) phone sample

Questionnaire	Self-administered online survey	Computer-assisted telephone interviewing conducted by professional interviewers
	Short questionnaire, < 30 questions	Complex survey with many programmed skips; 100+ questions
	19 service attributes in eight categories rated on a five-point agree/disagree scale	42 attributes in nine categories rated on a five-point satisfied/dissatisfied scale
	Designed for a single customer group: bus riders	Designed to obtain information about multiple customer groups: bus riders, commuters, park-and-ride lot users, non-riders

The IBBG survey is designed to be usable by diverse bus agencies in very different markets, so the questions are not specific to any particular transit system. Metro's Rider/Non-Rider survey does have some questions that are similar to IBBG's, although many of the RNR questions are more specific than IBBG's.

The table below compares the two surveys' best-matching "satisfaction" questions, including both the wording and the responses received for the top two categories of the rating scale. The percentage of riders who agree with the IBBG statements is always lower than the percentage of riders who are satisfied with the RNR attributes. The wording, methodologies, and samples are different in the two studies, so different results are expected.

IBBG Service Area	IBBG question wording: Respondent is asked if they agree or disagree with the statement	% for Top 2 Boxes	RNR question that's most similar to IBBG question: Respondent is asked if they are satisfied or dissatisfied with the attribute	% for Top 2 Boxes
Availability	The bus service is usually reliable	65%	On-time performance	75%
	The buses are frequent	48%	Frequency of service	78%
	The bus routes are convenient for me	61%	Availability of service where you need to travel	74%
			Distance from home to bus stop	86%
Accessibility	It is easy for me to get into and out of the bus	89%	Ease of getting on and off due to crowding on the bus	78%
	It is easy to move around inside the bus	64%		
	It is convenient paying a fare	84%	Ease of paying fares when boarding	96%
Information	It is easy to get information about the bus services	71%	Overall ability to get information about Metro's routes and schedules	90%
	It is easy to get up to the minute information on when my bus will arrive	52%	Website posting of delays and problems	84%
	If there are problems, I can easily find an alternative route	28%		
Time	The bus gets me to my destination in good time	47%	Amount of time it takes to travel	77%
Customer care	Staff are well dressed	78%		
	Staff are helpful	74%	Driver helpfulness with route and stop information	90%
	Staff are helpful resolving problems or complaints	50%	Ability to provide feedback	
			Drivers effectively handle problems on the bus	86%
Comfort	The seats are comfortable and there is enough space	48%	Availability of seating on the bus	73%
	The bus is well driven and gives a comfortable ride	63%	Drivers operate the bus in a safe and competent manner	95%
	The bus is clean	50%	Inside cleanliness of buses	87%
	The bus is quiet, well lit, ventilated and at an adequate temperature	47%		
Security	The bus is a secure place for me	60%	Personal safety on the bus related to the conduct of others during the daytime	90%
Environmental impact	The bus helps to reduce pollution	81%		
Overall Satisfaction	How satisfied are you overall with the bus services in the city? (Uses Satisfaction scale)	64%	Overall, would you say you are satisfied or dissatisfied with Metro?	92%

The shaded areas in the RNR column indicate that there is no close match for the IBBG questions.

In addition to the questions listed in the table, the RNR asks many other questions that provide more specific information for use in planning, marketing, and communications. For example, RNR uses several questions to evaluate more specific aspects of security: questions about security during the day versus the night and on the bus versus at the stops.

Appendix A
2017 International Bus Benchmarking Group

	Location	Bus operator
1	Barcelona	Transport Metropolitans de Barcelona
2	Brussels	Société des Transports Intercommunaux de Bruxelles
3	Dublin	Dublin Bus
4	Istanbul	IETT
5	Kuala Lumpur	RapidKL
6	Lisbon	Companhia Carris de Ferro de Lisboa
7	London	London Buses
8	Montreal	Société de Transport de Montréal
9	New York	New York City Transit & MTA Bus
10	Paris	Régie Autonome des Transports Parisiens
11	Seattle	King County Metro Transit
12	Singapore	SMRT Buses
13	Sydney	Sydney Buses
14	Vancouver	Coast Mountain Bus Company

Appendix B
IBBG Customer Satisfaction Questionnaire

1. Introduction

Dear Customer,

Fourteen transit agencies from around the world, including King County Metro, are conducting a customer survey at the same time. These agencies will compare the results of the surveys to learn from each other and work towards giving you even better transit service.

We would like to hear your thoughts about the bus service **King County Metro** provides for you. For example, are the buses usually on time? Is it easy to get information about the bus services, is it convenient paying a fare? Are the buses clean, comfortable and well-driven?

We are interested in your replies whether you use the buses frequently, occasionally, or even if you hardly ever use the bus service.

There are 20 statements below, and we would like to know whether you agree or disagree with each of them. Just click the column that shows your reaction to each statement.

Your personal details and responses will remain confidential and will not be used for any other purpose.

Thank you for completing our survey.

2. Detailed Questions Part 1

The following statements relate to the availability, accessibility, information and travel time of your bus service, so that we can see what our customers think.

Please click the column that best describes your reaction to each of the following statements:

1. Availability

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
The bus service is usually reliable	○	○	○	○	○	◉
The buses are frequent	○	○	○	○	○	◉
The bus routes are convenient for me	○	○	○	○	○	◉

2. Accessibility

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
It is easy for me to get into and out of the bus	○	○	○	○	○	●
It is easy to move around inside the bus	○	○	○	○	○	●
It is convenient paying a fare	○	○	○	○	○	●

3. Information

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
It is easy to get information about the bus services	○	○	○	○	○	●
It is easy to get up to the minute information on when my bus will arrive	○	○	○	○	○	●
If there are problems, I can easily find an alternative route	○	○	○	○	○	●

4. Time

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
The bus gets me to my destination in good time	○	○	○	○	○	●

3. Detailed Questions Part 2

The following statements relate to the customer care, comfort, security and environmental impact of your bus service, so that we can see what our customers think.

Please click the column that best describes your reaction to each of the following statements:

5. Customer Care

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
Staff are well dressed	○	○	○	○	○	◉
Staff are helpful	○	○	○	○	○	○
Staff are helpful resolving problems or complaints	○	○	○	○	○	○

6. Comfort

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
The seats are comfortable and there is enough space	○	○	○	○	○	○
The bus is well driven and gives a comfortable ride	○	○	○	○	○	○
The bus is clean	○	○	○	○	○	○
The bus is quiet, well lit, ventilated and at an adequate temperature	○	○	○	○	○	○

7. Security

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
The bus is a secure place for me	○	○	○	○	○	○

8. Environmental Impact

	Agree Strongly	Agree	Neutral	Disagree	Disagree Strongly	Don't Know
The bus helps to reduce pollution	○	○	○	○	○	◉

4. Overall Satisfaction and Priority

9. Overall Satisfaction

	Very Satisfied	Satisfied	Neither	Dissatisfied	Very Dissatisfied	Don't Know
Overall, how satisfied are you with Metro's bus service?	○	○	○	○	○	◉

10. Please rate how likely you would be to recommend the service to a friend or family member (0 not likely at all, 10 very likely).

○ 0 ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9 ○ 10

◉ Don't Know / Don't Use

11. What are the 3 most important areas of service for you as a user of public transport? (Please specify 3 categories only)

	1st	2nd	3rd
Availability (frequency and reliability of the service, hours of operation)	◉	○	○
Accessibility (ease of getting on and off the bus)	◉	○	○
Information (availability and quality of maps, timetables and information on delays)	◉	○	○
Time (Travel time and staying on-time)	◉	○	○
Customer Care (helpful staff, responding to your suggestions or complaints)	◉	○	○
Comfort (temperature, ventilation, comfortable journey, cleanliness, crowding)	◉	○	
Security (feeling safe and secure)	◉	○	○
Environment (effect on pollution)	◉	○	○

5. Your Details

12. What is your current age?

⦿ Less than 18

○ 18 to 29

○ 30 to 39

○ 40 to 49

○ 50 to 65

○ More than 65

13. What is your gender?

⦿ Male

○ Female

14. How often do you use our buses?

⦿ Very often (every day)

○ Often (at least 3 days per week)

○ Sometimes (at least once per week)

○ Rarely (at least once per month)

○ Very rarely (less than once per month)

15. What is your most frequent trip purpose?

⦿ Work / Education

○ Shopping

○ Leisure / Social

○ Doctor / Hospital

○ Other

Other (please specify) [   ]

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6. End

Thank you for participating in our survey.
Your opinions and comments will be used to improve our service to you