



STAFF REPORT INFORMATION ONLY

2014 Customer Satisfaction Survey Results

Date:	April 29, 2015
To:	TTC Board
From:	Arthur Borkwood, Head of Customer Development

Summary

The purpose of this report is to provide an overview of the 2014 Customer Satisfaction Survey results. The report is for information only and will include the objectives of the study, methodological approach, respondent profile, key findings, trending analysis, opportunities for improvement and next steps.

In 2014 the overall customer satisfaction ratings remained consistent (average score was 72%). Detailed results on key measures, such as overall customer satisfaction score, value for money, and pride in the TTC and what it means to Toronto are included in the report.

Financial Impact

This report has no financial impact beyond what has been approved in the current year's budget.

Comments

The TTC will continue to conduct the Customer Satisfaction Survey in 2015. The Board will be provided with an update in September 2015.

Contact

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Attachments

2014 Customer Satisfaction Survey Report



CUSTOMER SATISFACTION SURVEY – 2014 RESULTS

TTC Board – April 29, 2015





- Objectives
- Methodology
- Respondent profile
- Key Findings
- Trending Analysis
- Opportunities for Improvement
- Next steps





Objectives

- The TTC Customer Satisfaction Survey (CSS) is one of the **four critical measures of perceptions about the TTC** (the other three are: Mystery Shopper Survey, Employee Engagement Survey and Stakeholder Satisfaction Survey).
- The survey measures the overall level of customer satisfaction with key aspects of service provided by the TTC.
- The specific objectives are:
 - Tracking customer satisfaction over time,
 - Identifying and understanding key drivers of customer satisfaction and customer loyalty (pride in the TTC and what it means to Toronto),
 - Identifying and prioritizing critical areas for improvement.





Methodology

- The CSS study has been conducted since 2012.
- Surveys are conducted via telephone by an independent research company (Environics).
- Survey respondents are City of Toronto residents, at least 13 years of age, who use the TTC at least once every few weeks or more frequently.
- Data is collected continuously on a quarterly basis, over a period of 3 months to ensure sample is equally distributed by month.
- Number of completed surveys per quarter ~ 1,000.





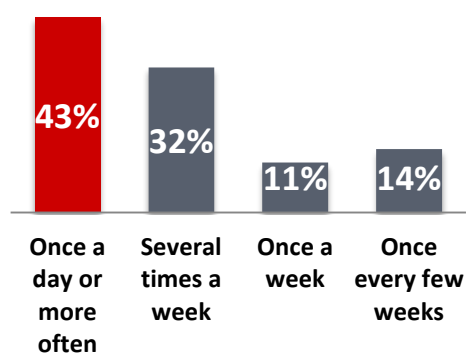
RESPONDENT PROFILE



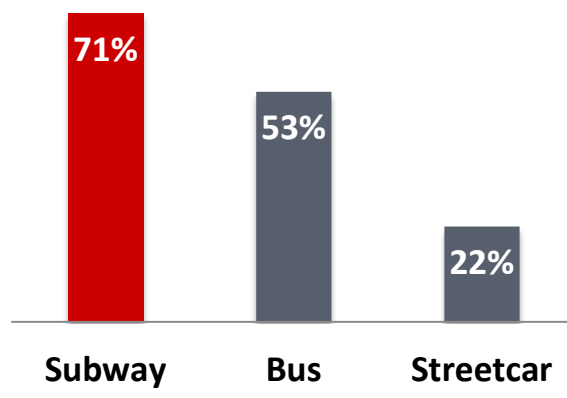
RESPONDENT PROFILE-Q4 2014



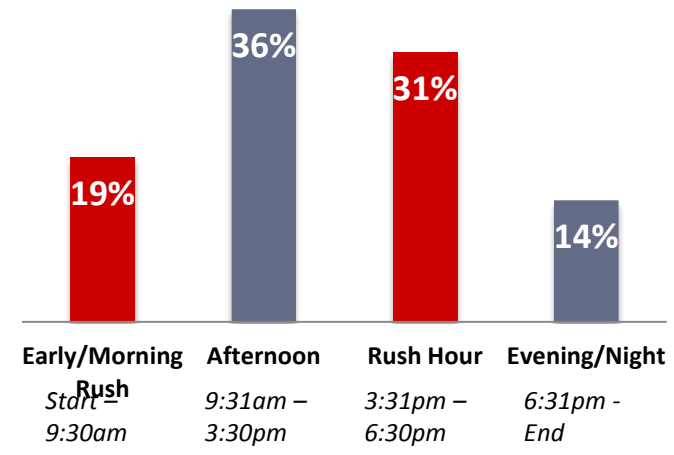
FREQUENCY OF TTC USAGE



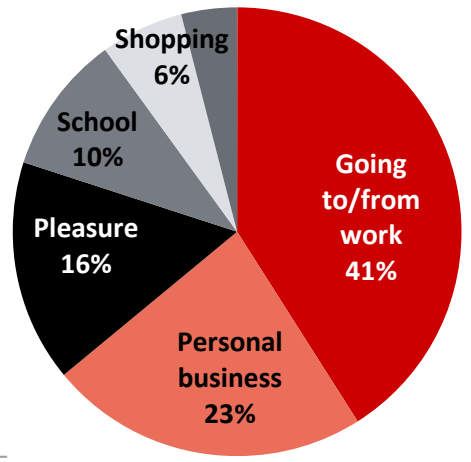
MODE OF TRANSPORTATION OF MOST RECENT TRIP ON TTC



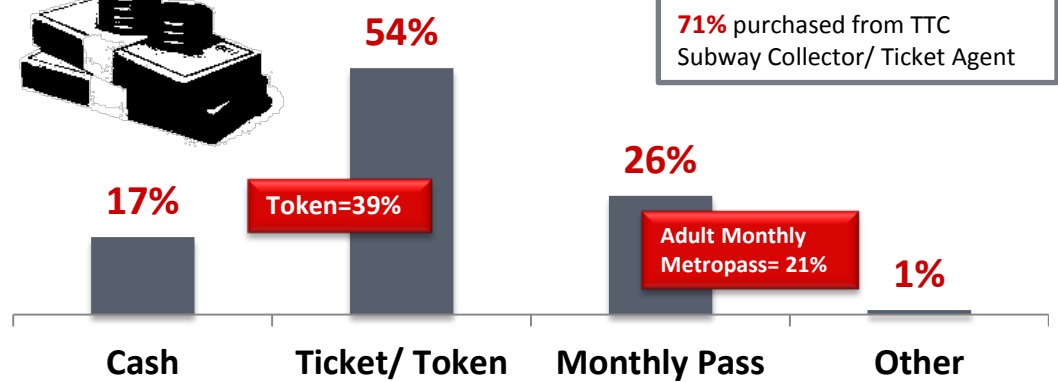
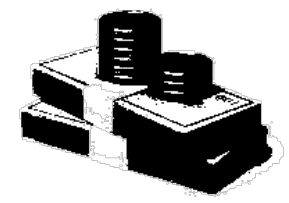
TIME OF DAY OF LAST TRIP



PURPOSE OF LAST TTC TRIP



FARE TYPE



71% purchased from TTC Subway Collector/ Ticket Agent





KEY FINDINGS





Overall customer satisfaction (72%) is consistent with the previous wave (74%) and the overall trend.

Areas of highest customer satisfaction include (+ 80% for Q4 2014):

- Personal safety while travelling on subway, bus, or streetcar,
- Ease of getting to train platform,
- The quality of announcements of each subway stop,
- Maps and information inside the subway train.

Areas of lowest customer satisfaction include ($\leq 60\%$ for Q4 2014):

- Frequency, ease of hearing, clarity and helpfulness of announcements about subway delays,
- Availability of subway station staff,
- The level of crowding inside the subway train, bus, and streetcar,
- The length of time a customer waited for the bus/streetcar,
- Maps and information inside the bus/streetcar.





Perceived value for money has remained consistent, with \approx 90% rating values as “average” or better.

Pride in the TTC and what it means to Toronto has declined (66%), compared to Q3 2014 (71%) and the same time period last year (73%).

- Customers who are NOT proud of the TTC tend to be more educated, working full-time and to have higher household income. They are also more likely to be dissatisfied and perceive lower value for money.





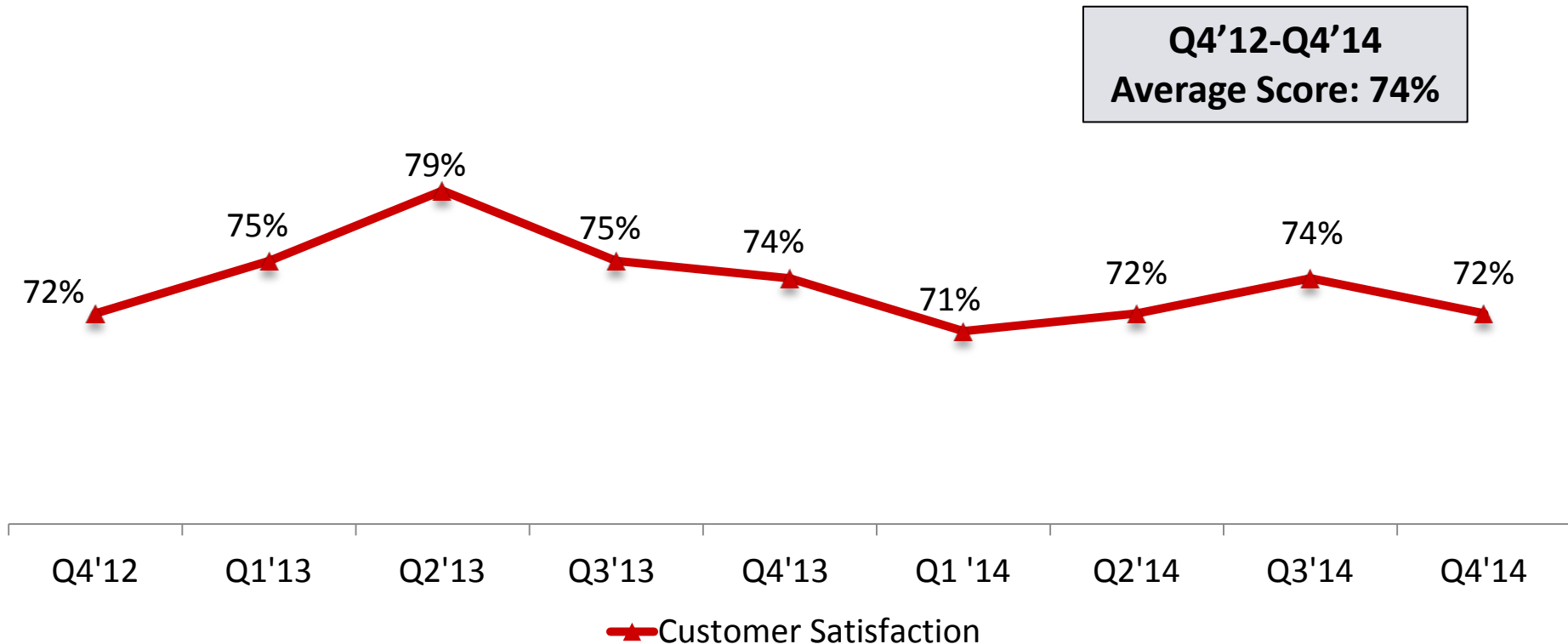
TRENDING ANALYSIS



CUSTOMER SATISFACTION OVER TIME



Customer Satisfaction Over a Two-Year Period



Q10. How satisfied were you overall with the quality of the TTC's service on the last TTC trip you took, on a scale of 1 to 10 where 10 is extremely satisfied and 1 is extremely dissatisfied? How would you rate the service on a scale of 1 to 10 for your last trip?

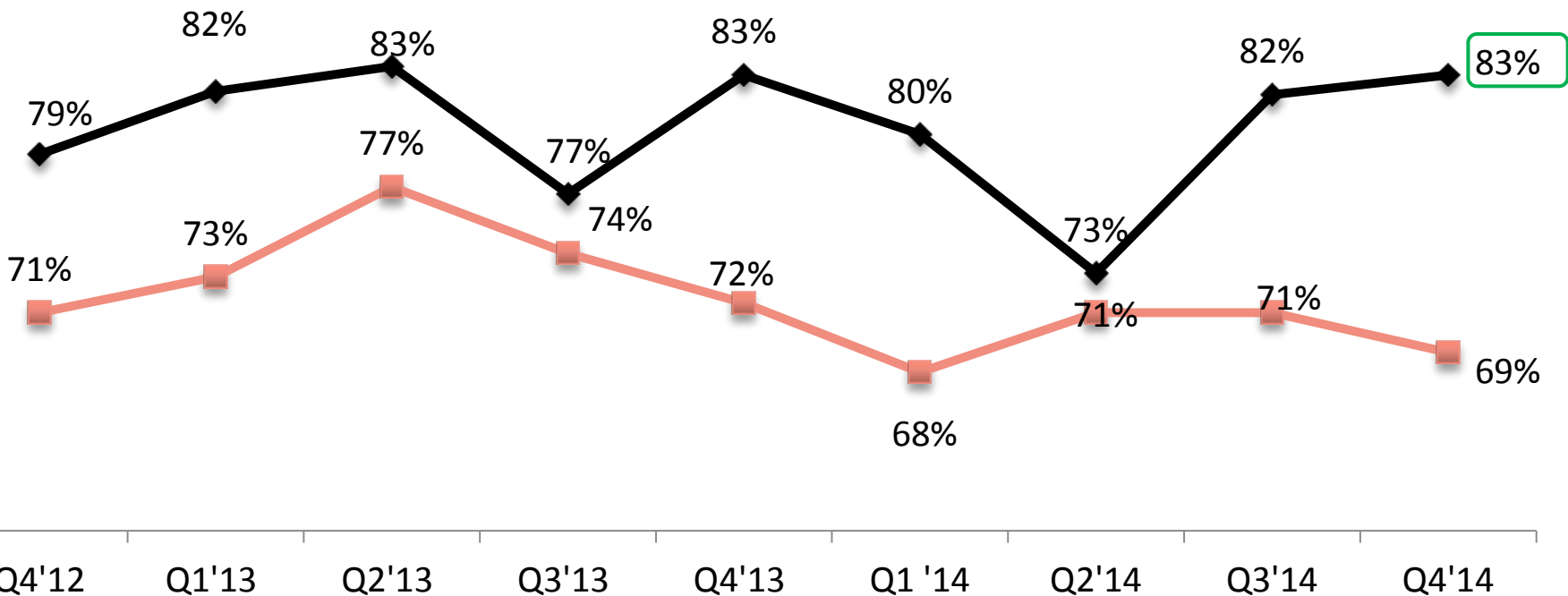


CUSTOMER SATISFACTION BY FREQUENCY OF TTC USAGE



Gap between satisfaction ratings of occasional and frequent users has widened in Q4 2014.

Good/Excellent Satisfaction Ratings Based on Frequency of TTC Usage



◆ Occasional: Once a week or less
 ■ Frequent: Daily to Several Times a week

 = sig. higher/ lower than other subgroups
↑ ↓ = sig. higher/ lower than other waves at

* Good/Excellent ratings refer to scores of 7-10 on a 1-10 scale.

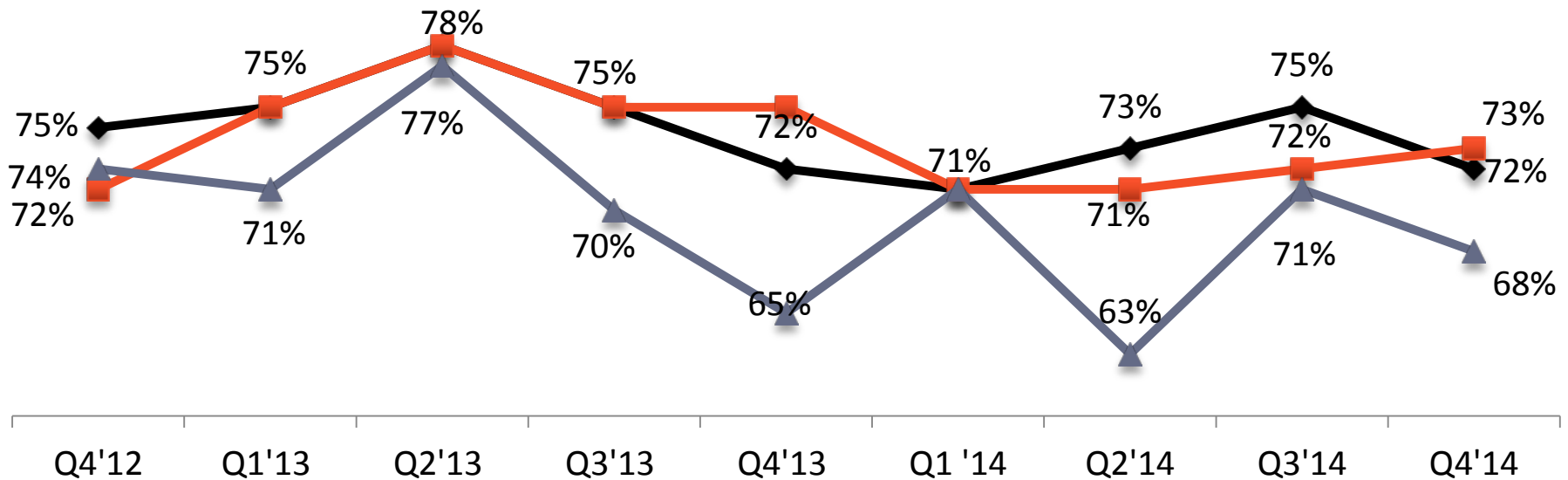
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CUSTOMER SATISFACTION BY MODE OF TRANSPORTATION

'Streetcar only' customers are less satisfied with the TTC service than 'subway only' and 'bus only' riders.

Good/Excellent Satisfaction Ratings Based on Mode of Transportation



◆ Used Subway ■ Used Bus ▲ Used Streetcar

* Good/Excellent ratings refer to scores of 7-10 on a 1-10 scale.

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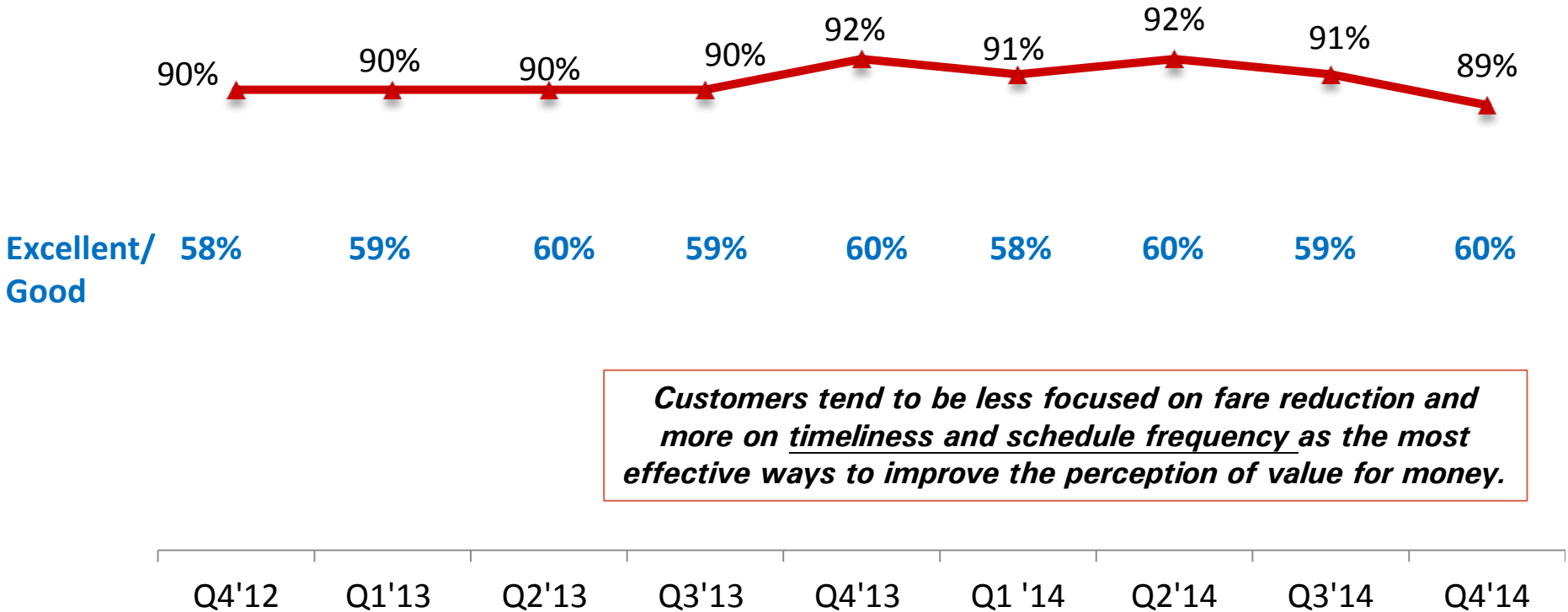
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VALUE FOR MONEY HAS BEEN CONSISTENT OVER THE PAST TWO YEARS



Value for Money* Over a Two-Year Period



Customers tend to be less focused on fare reduction and more on timeliness and schedule frequency as the most effective ways to improve the perception of value for money.

▲ Value for Money (Excellent/Good/Average)

*Excellent/Good/Average Value for Money

Q17. On you last TTC trip would you say you received ____ [READ LIST] for your money?

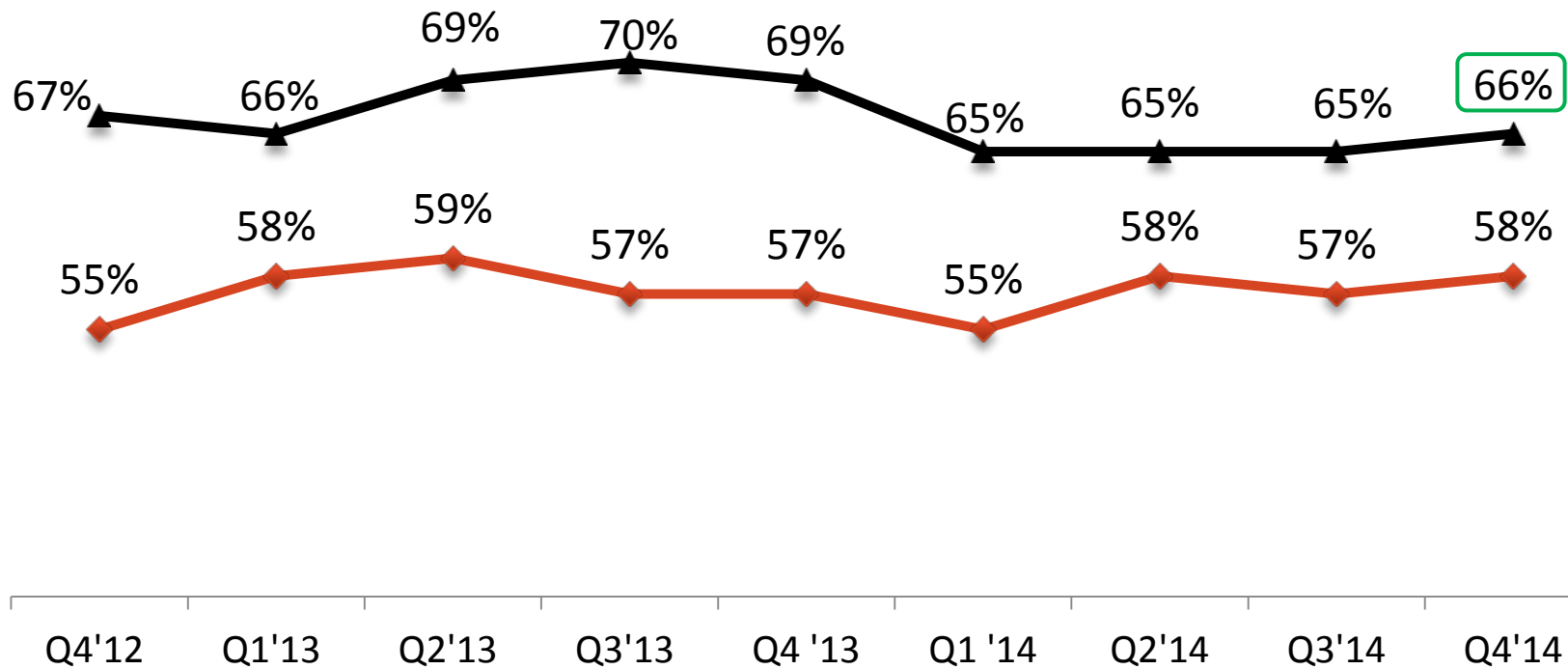


VALUE FOR MONEY BASED ON FREQUENCY OF TTC USAGE



Occasional users continue to perceive higher value for money.

Value for Money* Based on Frequency of TTC Usage Over Waves



▲ Occasional: Once a week or less

◆ Frequent: Daily to Several Times a week

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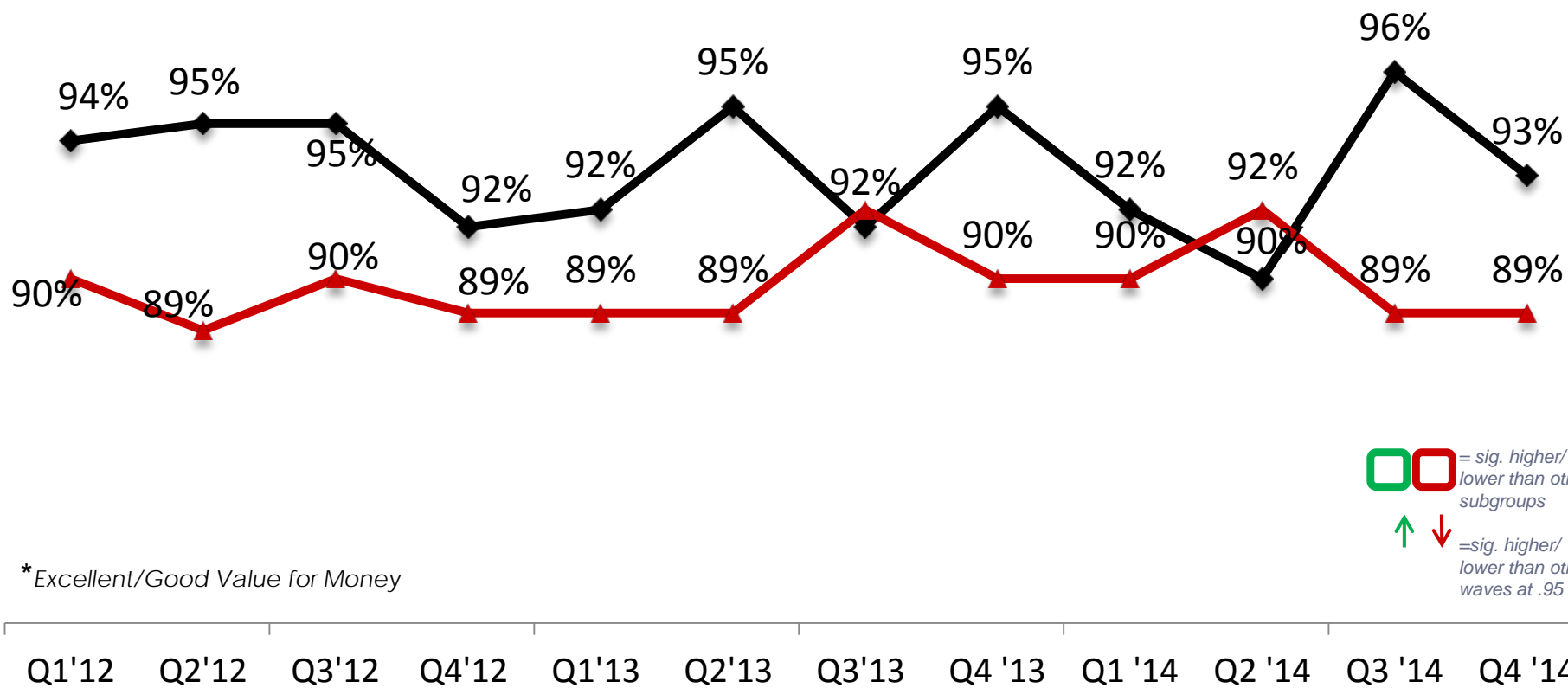


*Excellent/Good Value for Money

VALUE FOR MONEY BASED ON FREQUENCY OF TTC USAGE

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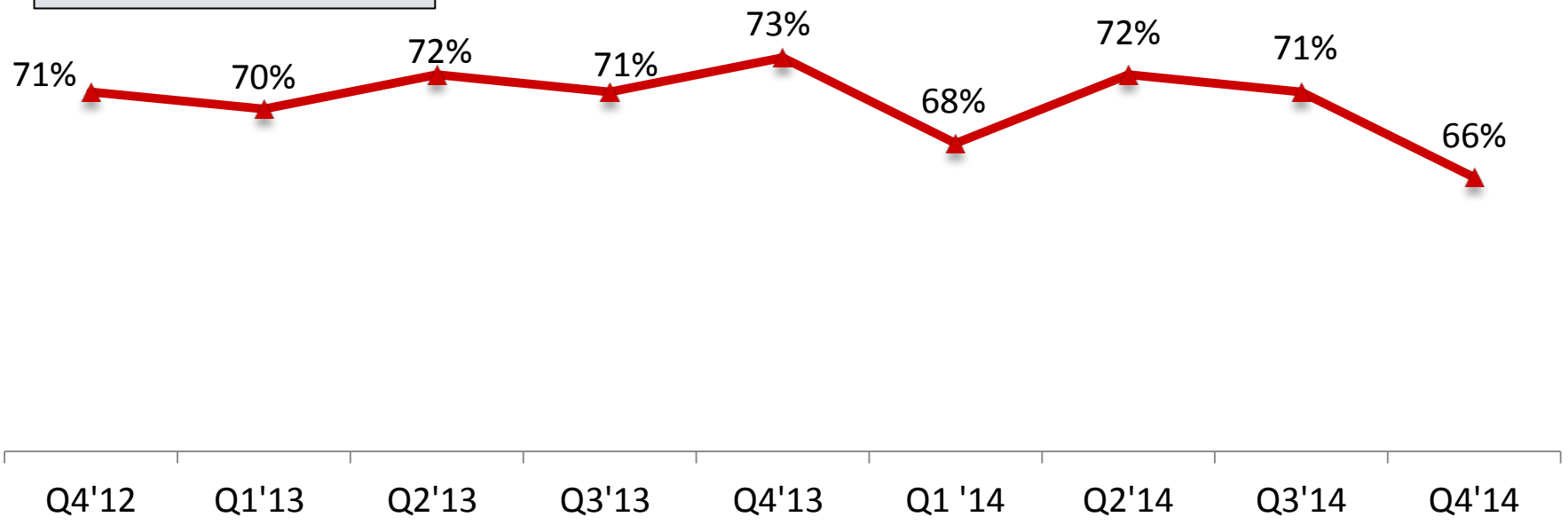
PRIDE IN THE TTC OVER TIME



Pride in the TTC and what it means to Toronto was lower than in the previous quarter and results observed a year ago.

Pride in the TTC Over a Two-Year Period

Q4'12-Q4'14
Average Score: 70%



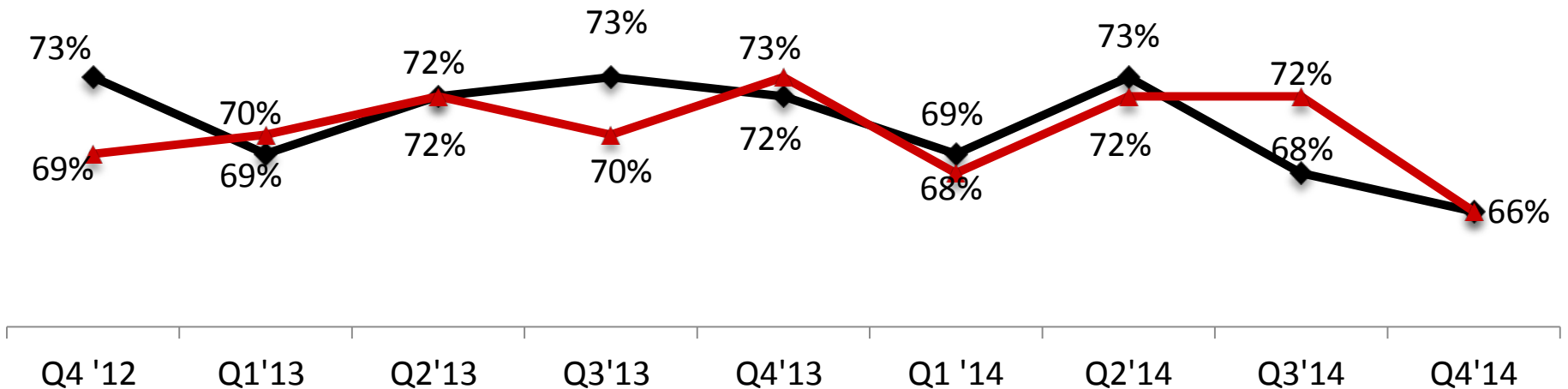
▲ Pride in the TTC and what it means to Toronto

□ □ = sig. higher/ lower than other subgroups
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PRIDE BASED ON FREQUENCY OF USAGE

Pride in the TTC and what it means to Toronto declined for frequent TTC users.

Pride in the TTC Based on Frequency of TTC Usage Over a Two-Year Period

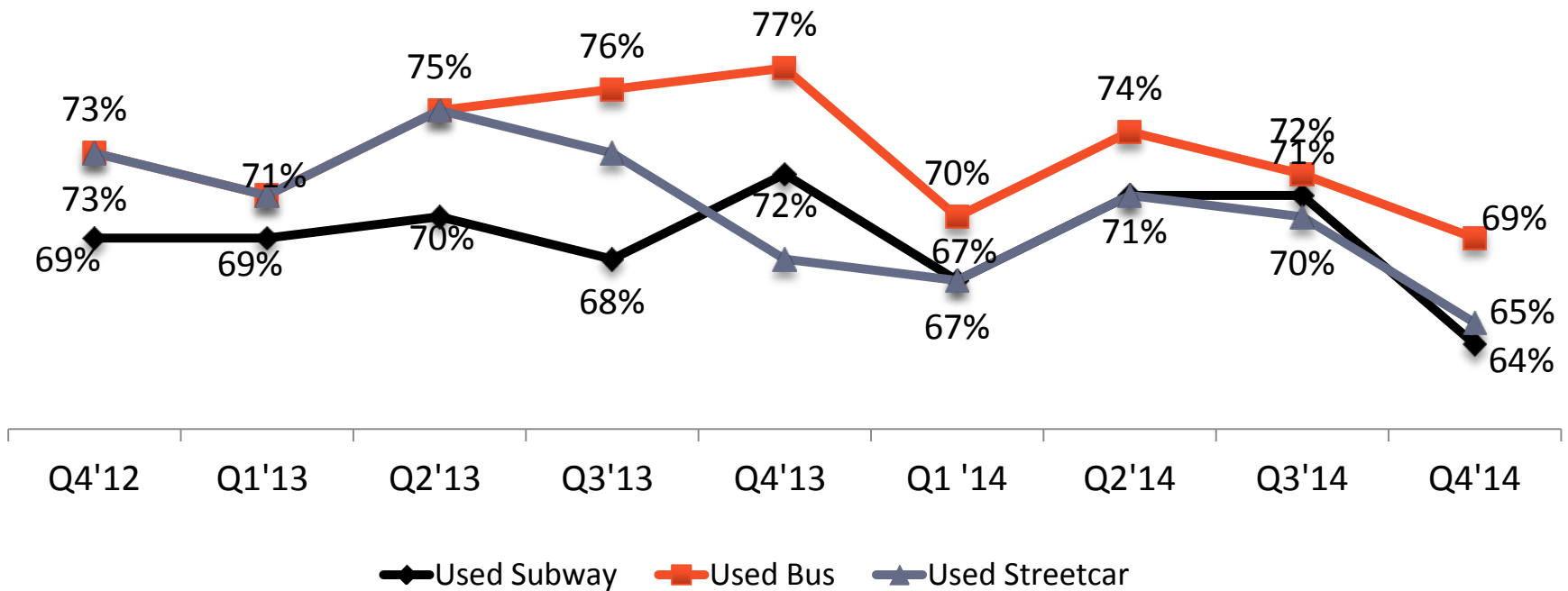


PRIDE BY DIFFERENT MODES



Pride ratings have declined for subway users. As this group of customers represents a major proportion of the sample, this decline had an impact on the overall score.

Pride in the TTC Based on Different Modes Over a Two-Year Period

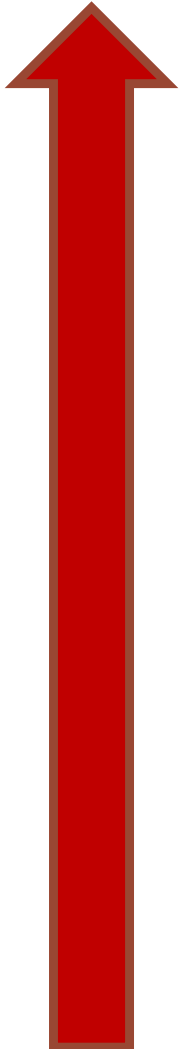


WHAT DRIVES CUSTOMER SATISFACTION?



Key Drivers

Most Influential Factor



Less Influential Factor

Subway

Trip duration

Wait time

Smoothness during the trip

Crowding during the trip

Staff Helpfulness/
Appearance

Personal safety during the trip

Bus

Wait time

Trip duration

Helpfulness of Operator

Crowding during the trip

Appearance of Operator

Personal safety during the trip

Smoothness during the trip

Streetcar

Wait time

Trip duration

Crowding in the vehicle

Helpfulness of Operator

Smoothness during the trip

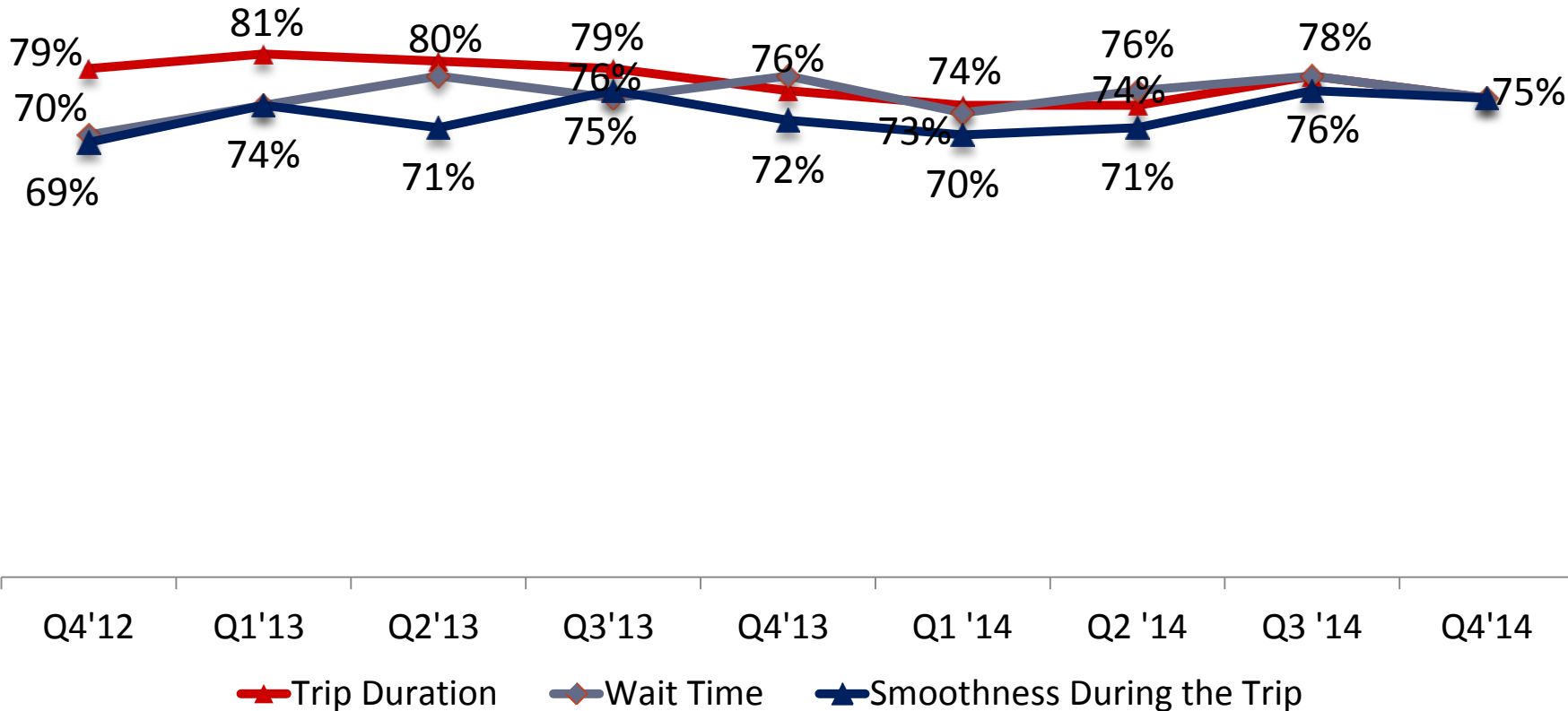
Helpfulness of announcements



SERVICE DELIVERY - SUBWAY



Subway: Performance of Top 3 Drivers of Customer Satisfaction Over Time



SERVICE DELIVERY-SUBWAY



- Although customer satisfaction with the subway service has remained consistent, there were no significant improvements in any specific service area.
- *Ease of buying tickets/tokens* declined compared to results observed a year ago (71% to 67%), and ratings for some attributes were significantly lower compared to the previous wave (Q3 2014):

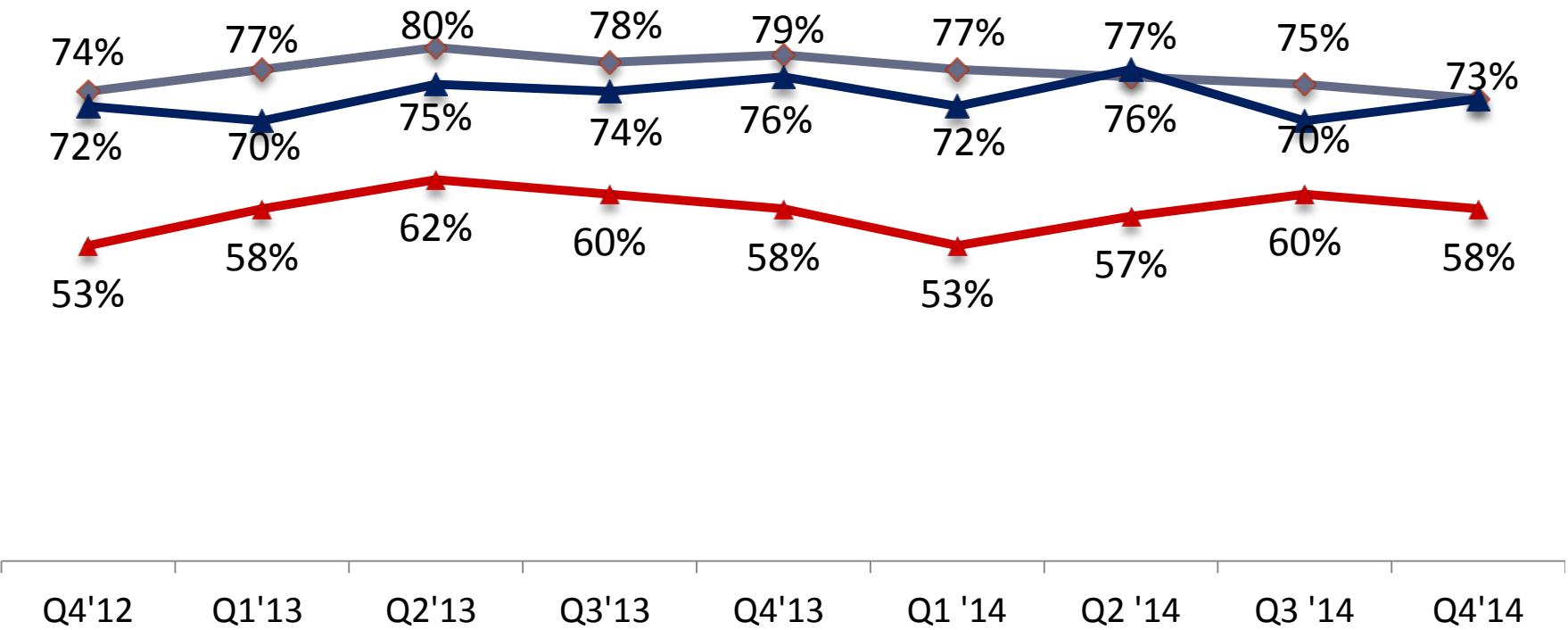
Service Attributes*	Q3'14	Q4'14	Change (percentage points)
Ease of getting to train platform	85%	80%	-5
The quality of announcements at each stop	87%	82%	-5



SERVICE DELIVERY - BUS



Bus: Performance of Top 3 Drivers of Customer Satisfaction Over Time



▲ Wait Time
 ◆ Trip duration
 ▲ Helpfulness of Operator

□ □ = sig. higher/lower than other subgroups
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SERVICE DELIVERY-BUS



- Satisfaction with most aspects of the bus service was consistent with the overall trend. Some attributes, however, have declined, compared to results observed last year:

Service attributes	Q4'13	Q4'14	Change (percentage points)
Trip duration	79%	73%	- 6
Ease of hearing announcements	79%	74%	-5
Maps and information inside the vehicle	55%	48%	-7

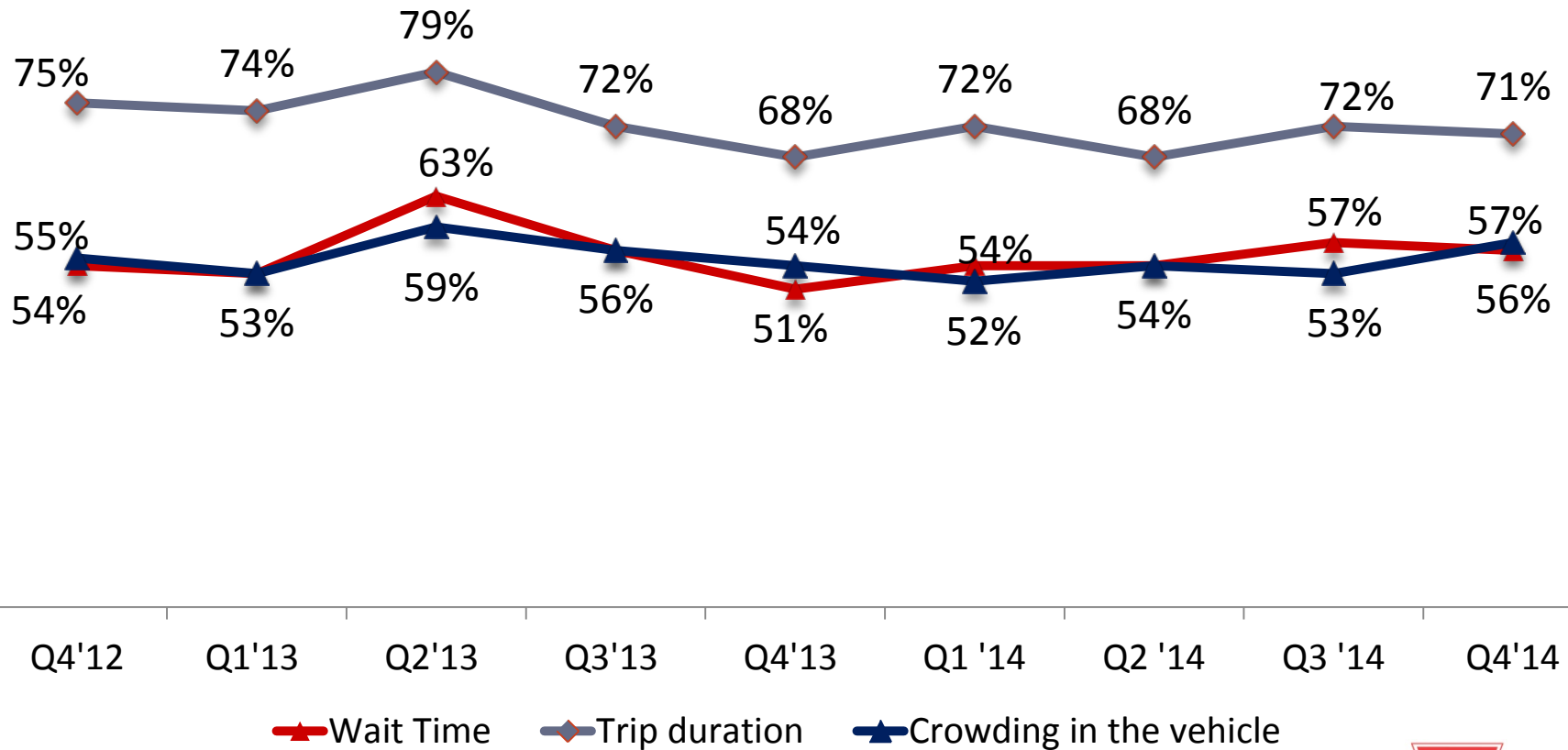


SERVICE DELIVERY - STREETCAR



Satisfaction with the streetcar service has been consistent with the previous quarter and the overall trend. There were no significant improvements or declines in customer perceptions of specific service attributes.

Streetcar: Performance of Top 3 Drivers of Customer Satisfaction Over Time



OPPORTUNITIES FOR IMPROVEMENT



- Recent declines in several subway service areas indicate a need to focus efforts on improving all aspects of subway service, including:
 - Reducing subway delays and crowding,
 - Continuing to focus on quality and ease of hearing the announcements about subway delays.
- Provide Station Managers with a tailored perspective on customer satisfaction for customers using their stations.
- The gap in satisfaction between frequent and occasional riders is increasing; therefore, providing a reliable service is key.





- Continue Customer Satisfaction Survey in 2015
- Update key measures in CEO report on quarterly basis
- Report back to Board twice a year





QUESTIONS?

