



STAFF REPORT INFORMATION ONLY

Q2 2015 Customer Satisfaction Survey Results

Date:	September 28, 2015
To:	TTC Board
From:	Chief Executive Officer

Summary

The purpose of this report is to provide an overview of the Q2 2015 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.

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 Summary

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

Comments

The Board will be provided with Q3 2015 results in October, focusing on customer perceptions during Pan Am/ Parapan Am Games.

Contact

Arthur Borkwood, Head of Customer Development
Strategy & Customer Experience Group
Toronto Transit Commission
Tel: 416 393 6085
Email: Arthur.Borkwood@ttc.ca

Attachments

Q2 2015 Customer Satisfaction Survey Report presentation to follow



CUSTOMER SATISFACTION SURVEY – Q2'15 RESULTS

September 28, 2015

Arthur Borkwood – Head of Customer Development





- Objectives
- Methodology
- Top Line Results
- Subway
- Bus
- Streetcar
- Summary
- Appendix



OBJECTIVES

Background

- TTC Customer Satisfaction Survey (CSS) has been conducted since 2012.
- The CSS is one of the critical measures of perceptions about the TTC (other studies include: Wheel-Trans Customer Satisfaction Survey, 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.

Objectives

- 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.





Method	10 minute telephone survey
Respondents	<ul style="list-style-type: none">• City of Toronto residents• At least 13 years old• Use TTC at least once every few weeks or more frequently
Timing	<ul style="list-style-type: none">• Quarterly• Data is collected continuously on a quarterly basis, over a period of 3 months to ensure sample is equally distributed by month.
Sample Size	1,000 completed surveys





TOP LINE RESULTS

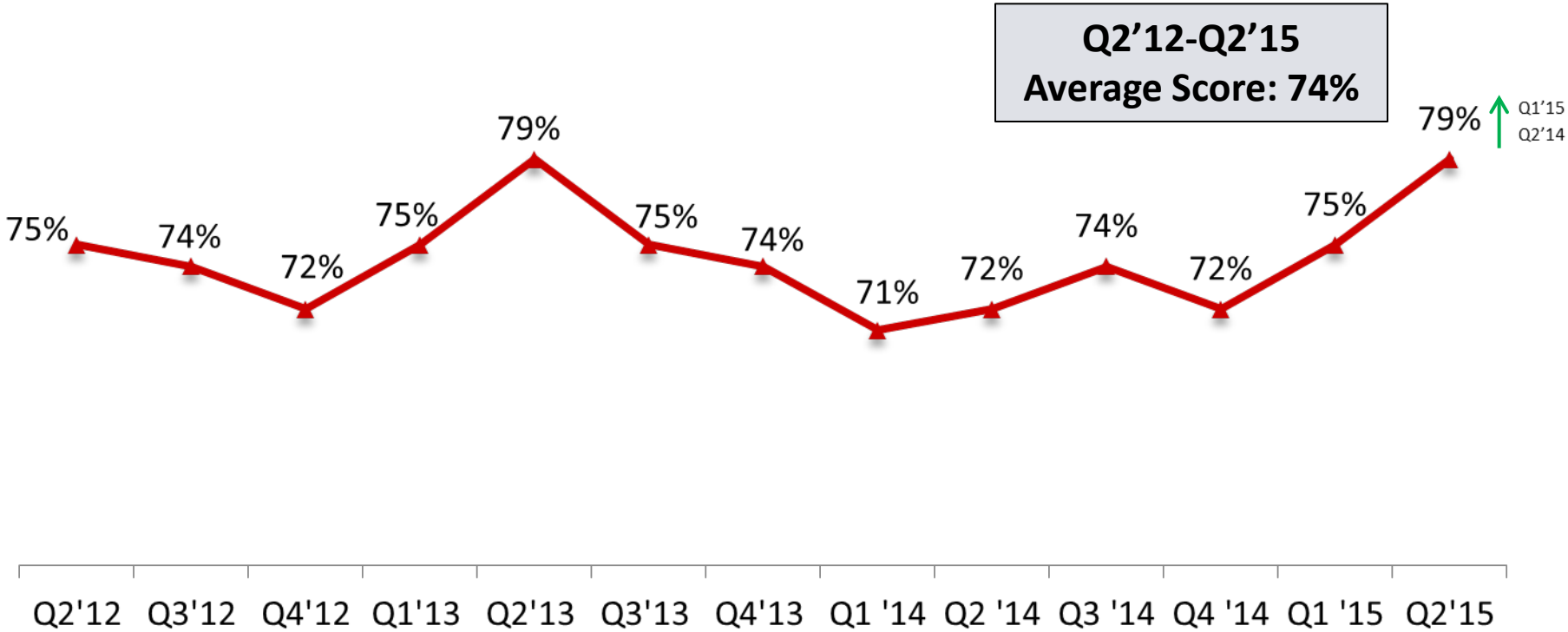


OVERALL SATISFACTION



Overall satisfaction (79%) increased significantly and matches the highest score achieved in Q2'13.

Good/Excellent Satisfaction Ratings Over a Two-year Period



↑ ↓ = higher or lower than previous wave or year at C.I. = .95 Customer Satisfaction

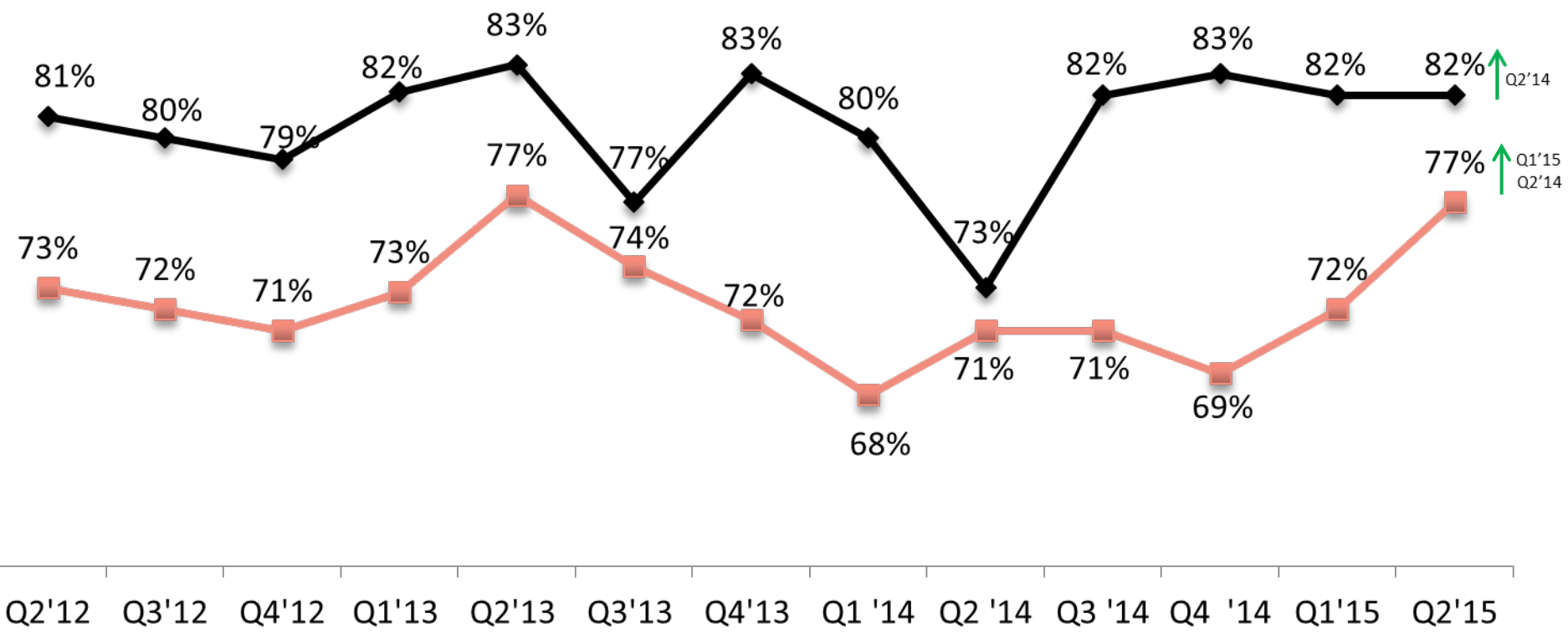
Q10. How satisfied were you overall with the quality of the TTC's service on the last TTC trip you took, on a scale of 1 to 10 where 10 is extremely satisfied and 1 is extremely dissatisfied? How would you rate the service on a scale of 1 to 10 for your last trip?



SATISFACTION BY FREQUENCY OF TTC USAGE

The increase in the overall satisfaction score is driven by frequent TTC users.

Good/Excellent Satisfaction Ratings Based on Frequency of TTC Usage



□ □ = sig. higher/lower than other subgroups
↑ ↓ = sig. higher/lower than other waves at .95
◆ Occasional: Once a week or less
■ Frequent: Daily to Several Times a week

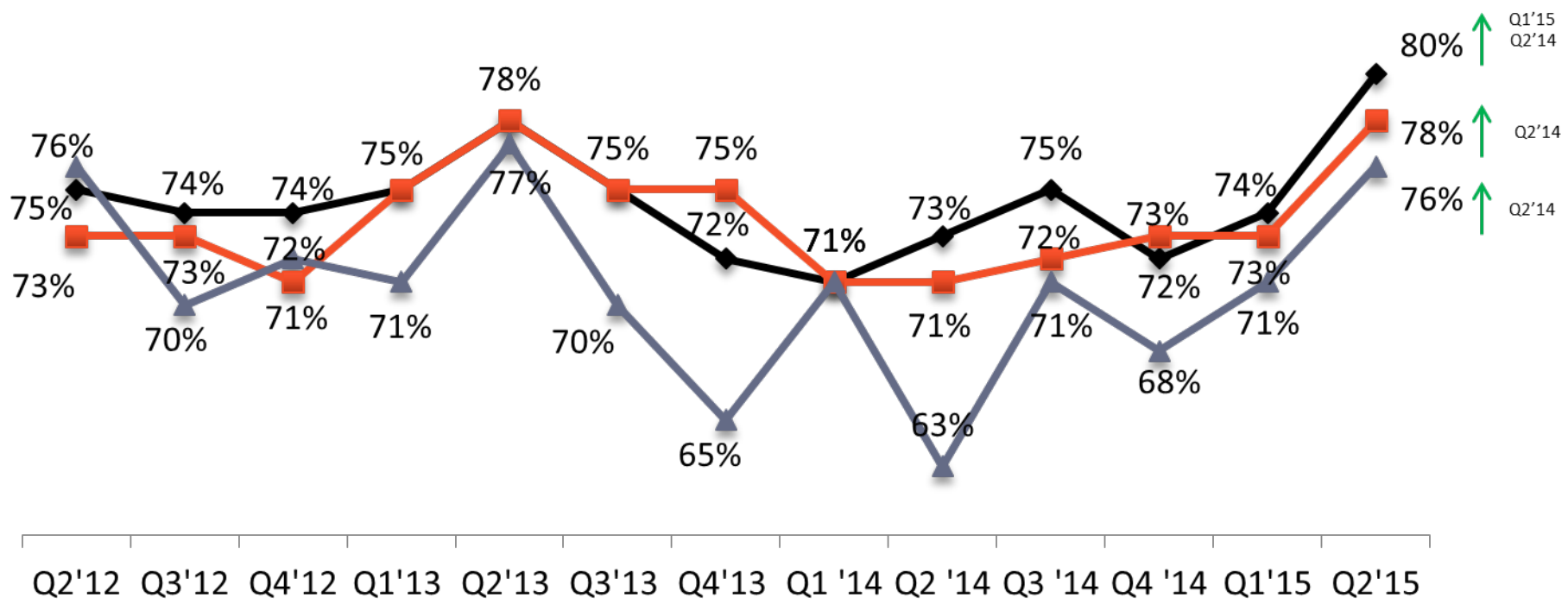


SATISFACTION BY DIFFERENT MODES



Customer satisfaction in Q2'15 was higher across all modes.

Good/Excellent Satisfaction Ratings Based on Mode of Transportation



 = sig. higher/ lower than other subgroups

↑ ↓ = sig. higher/ lower than other waves at .95

◆ Used Subway ■ Used Bus ▲ Used Streetcar

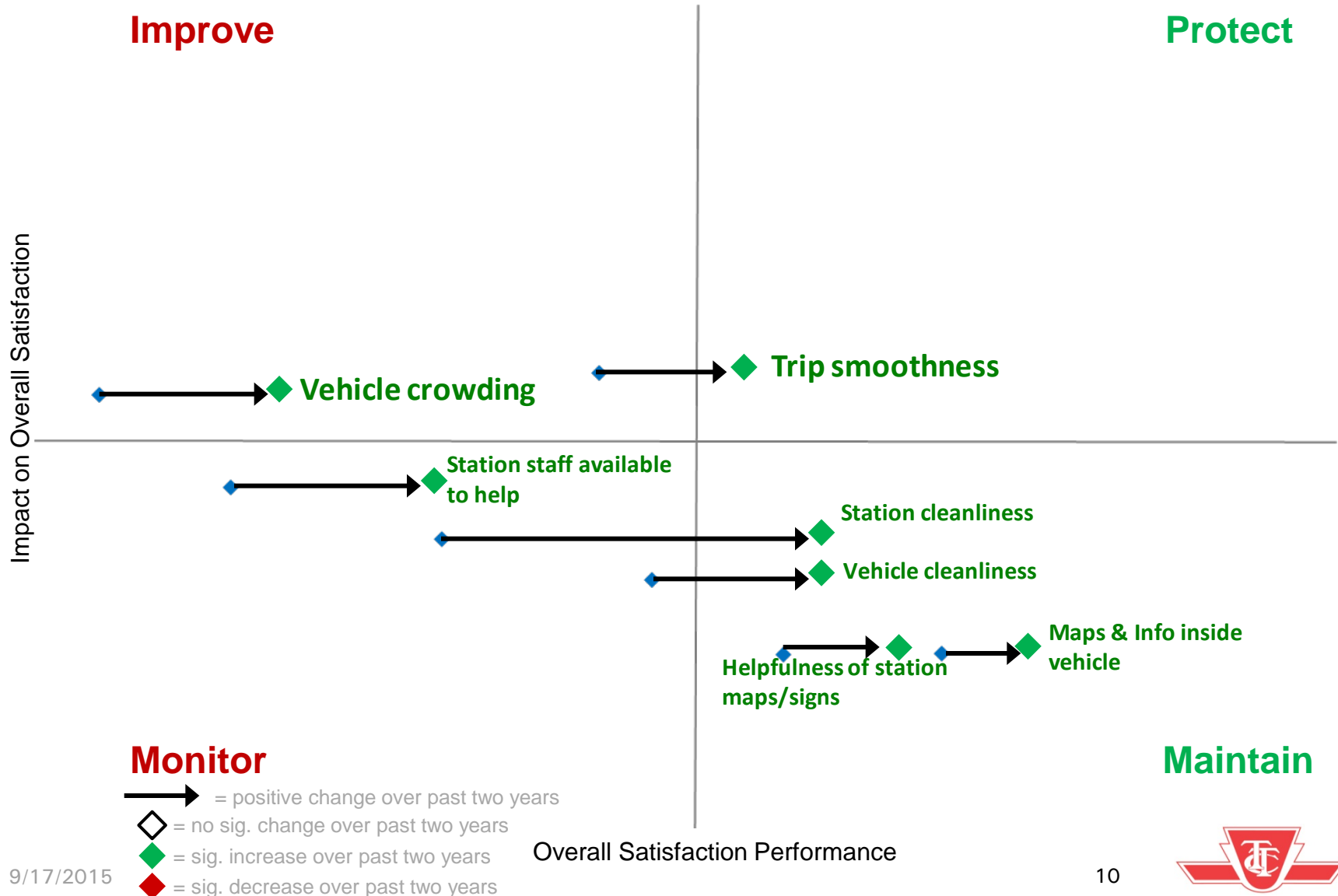


SUBWAY

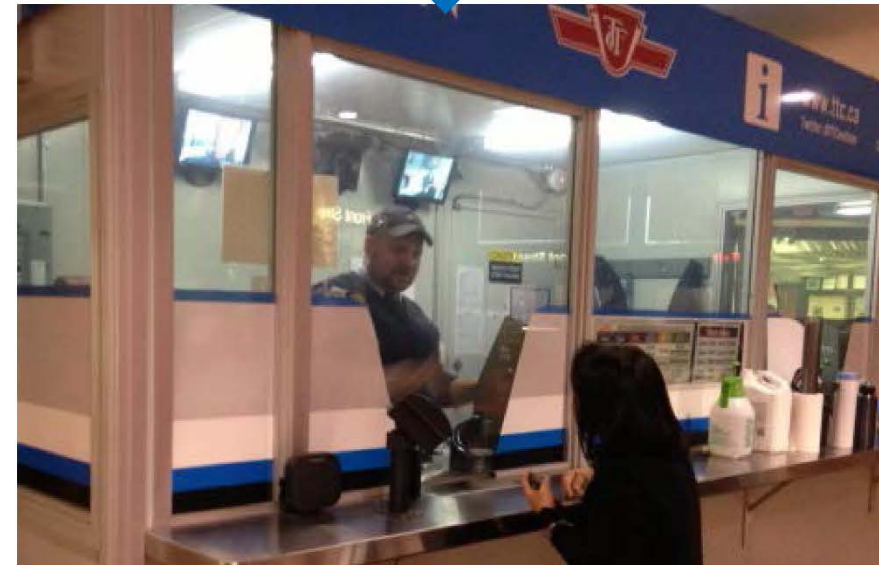


SUBWAY: IMPROVEMENTS OVER TWO-YEAR PERIOD

Overall Satisfaction - Importance vs Performance Maps - SUBWAY



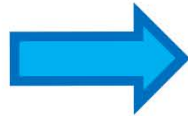
SUBWAY



SUBWAY



SUBWAY





Overall Satisfaction - Importance vs Performance Maps - SUBWAY

Improve

Q2'14 vs.Q2'15

Protect

Impact on Overall Satisfaction

Vehicle crowding

Staff helpfulness/
appearance

Trip smoothness

Personal safety

Station staff available to
help

Frequency of delay
announcements

Appearance of collector
booth

Station cleanliness

Helpfulness of
announcements

Ease of buying token/ticket

Quality of stop
announcements

Clarity of delay
announcements

Cleanliness inside vehicle

Ease of getting to platform

Ease of hearing station
announcements

Helpfulness of station maps
/ signs

Maps & Info inside vehicle

Monitor

Maintain

- ◊ = no sig. change over past two years
- ◆ = sig. increase over past two years
- ◆ = sig. decrease over past two years

Overall Satisfaction Performance

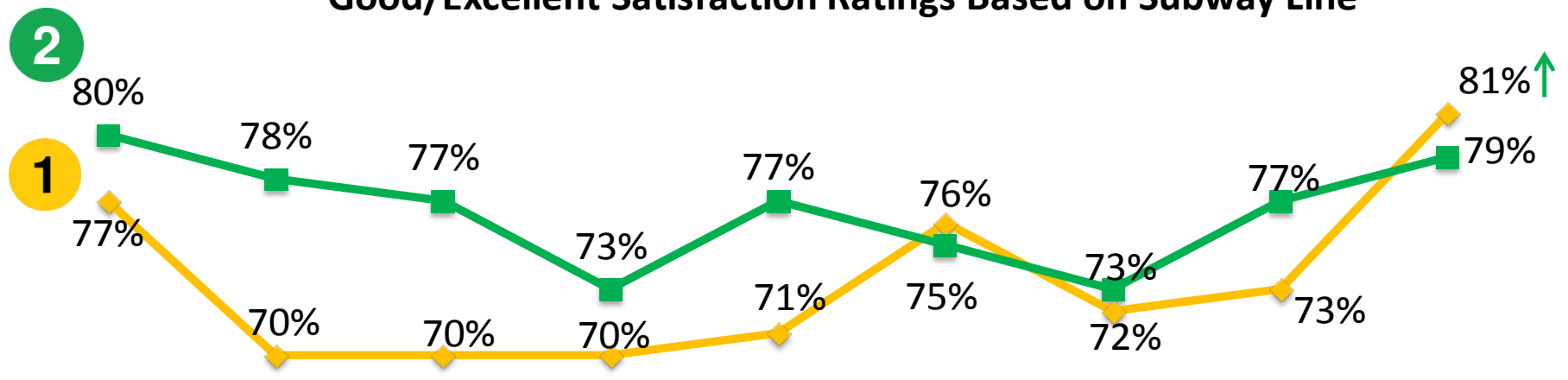


SATISFACTION BY SUBWAY LINE



Customer satisfaction has improved for Line 1 subway riders.

Good/Excellent Satisfaction Ratings Based on Subway Line



OPERATIONAL IMPROVEMENTS - SUBWAY

Reduction in the number and length of delays on Line 1 is likely to have had a positive impact on customer perceptions.

1 Line 1 - Subway Delays

LINE 1 Half-Year Summary	Delay Incidents			Delay Minutes		
	Q1-Q2 2014	Q1-Q2 2015	Change	Q1-Q2 2014	Q1-Q2 2015	Change
TOTAL	4,188	3,663	-13%	8,822	6,516	-26%
Equipment	1,474	1,217	-17%	2,604	1,579	-39%
Staff	1,226	1,052	-14%	1,539	1,174	-24%
Customer	1,488	1,394	-6%	4,679	3,763	-20%



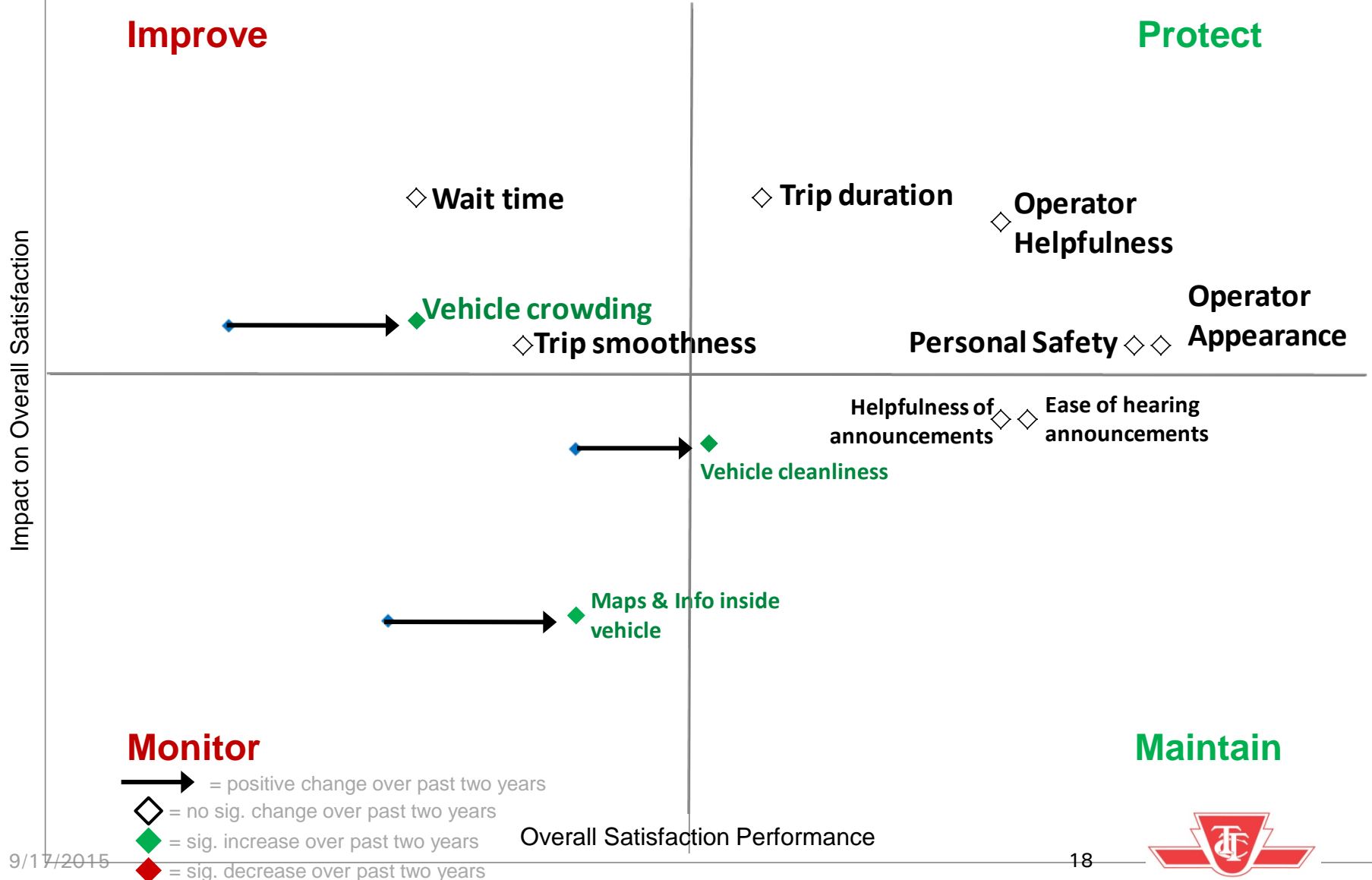
BUS



BUS: IMPROVEMENTS OVER TWO-YEAR PERIOD



Overall Satisfaction - Importance vs Performance Maps - BUS



BUS





Overall Satisfaction - Importance vs Performance Maps - BUS

Improve

Q2'14 vs. Q2'15

Protect

Impact on Overall Satisfaction



◆ Wait time +7

◇ Trip duration

◇ Operator Helpfulness

◆ Vehicle crowding

◇ Trip smoothness

Personal Safety ◇◇

Operator Appearance

Helpfulness of announcements ◇

Ease of hearing announcements ◇

◆ Vehicle cleanliness

◆ Maps & Info inside vehicle

Monitor

Maintain

- ◇ = no sig. change over past two years
- ◆ = sig. increase over past two years
- ◆ = sig. decrease over past two years

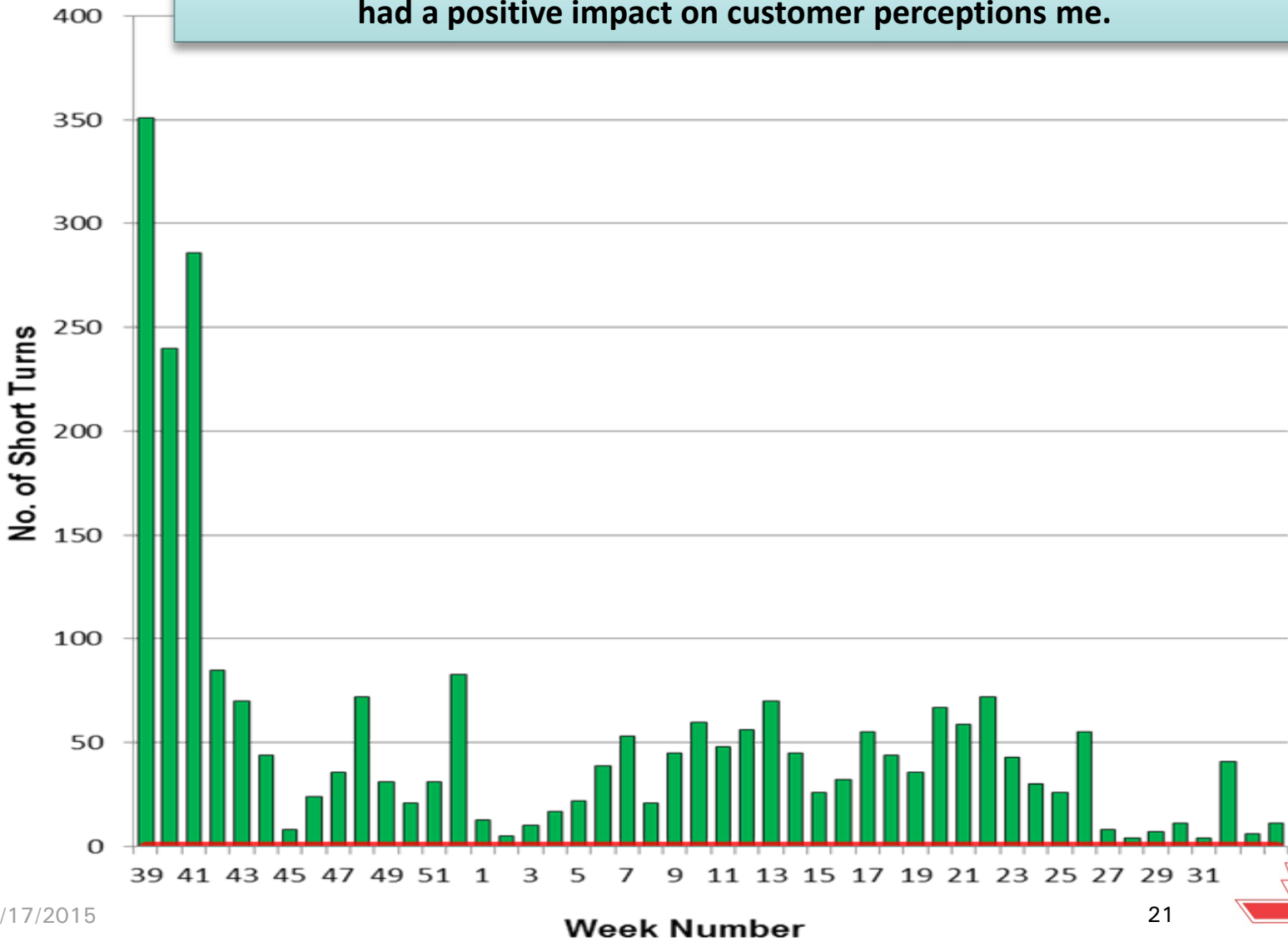
Overall Satisfaction Performance



29 DUFFERIN BUS ROUTE



Reduced number of short turns on 29 Dufferin bus route is likely to have had a positive impact on customer perceptions me.



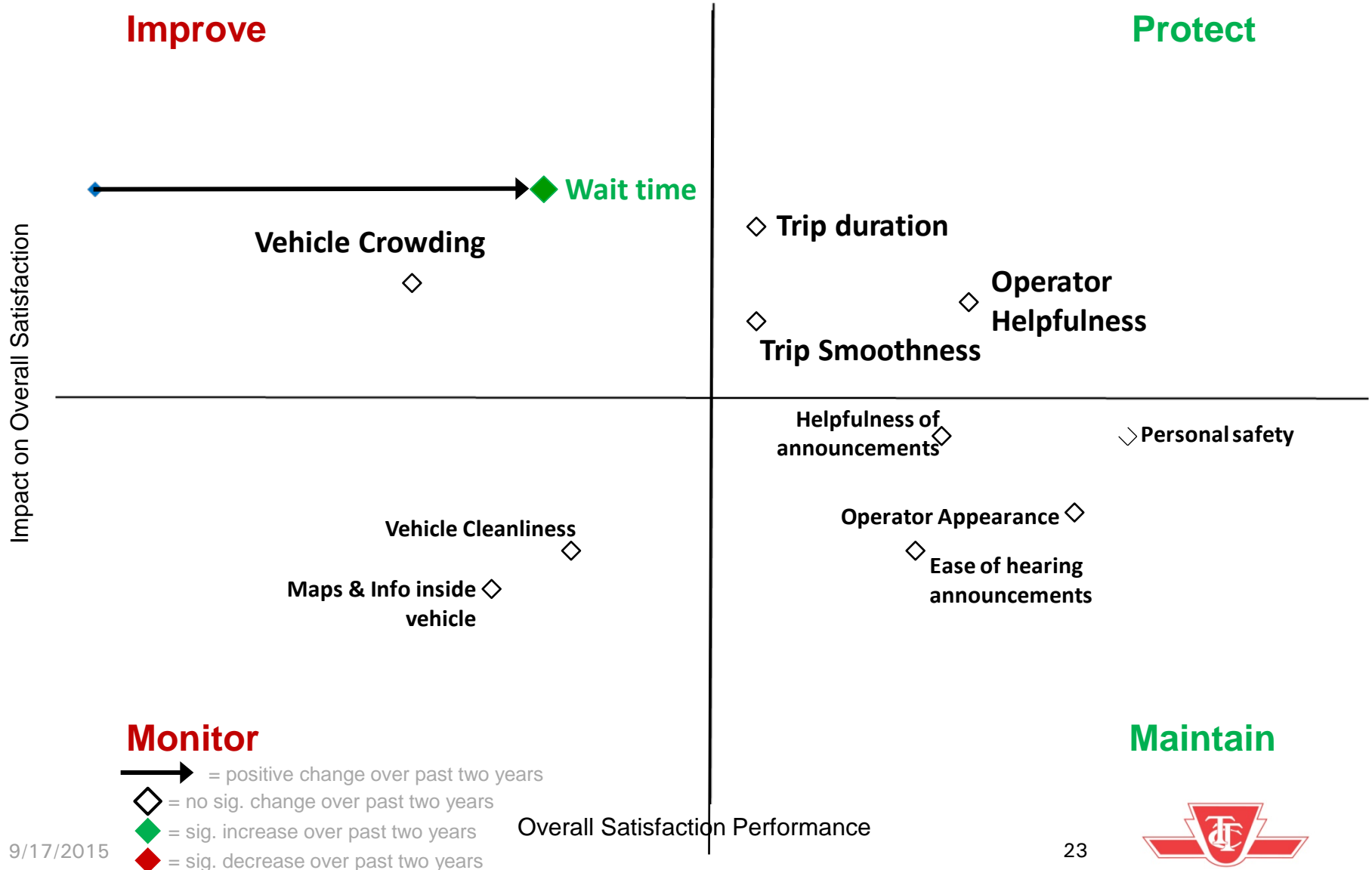
STREETCAR



STREETCAR: IMPROVEMENTS OVER TWO-YEAR PERIOD



Overall Satisfaction - Importance vs Performance Maps - STREETCAR



STREETCAR

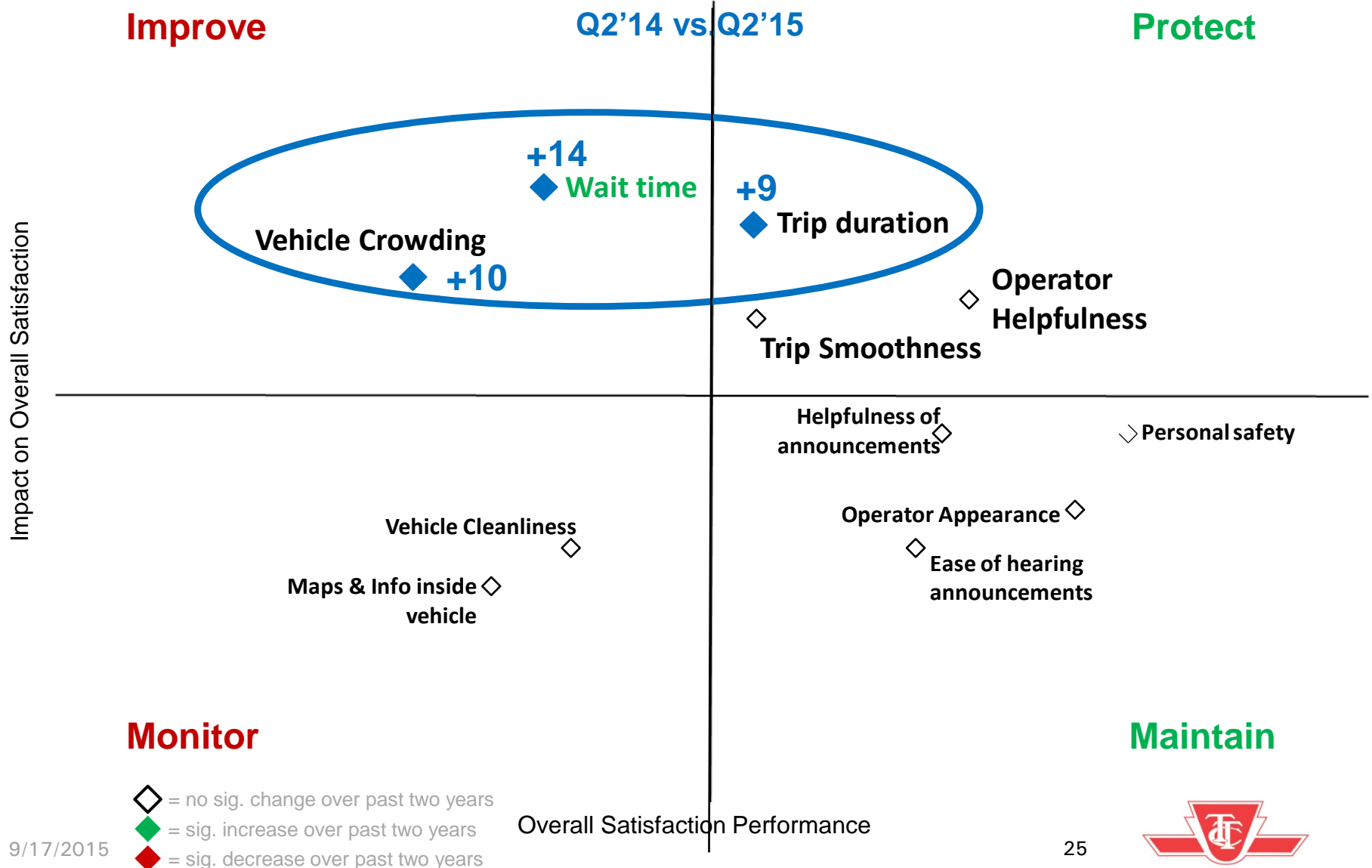


- **Capital coordination**
- **Events and Closure coordination**





Overall Satisfaction - Importance vs Performance Maps - STREETCAR

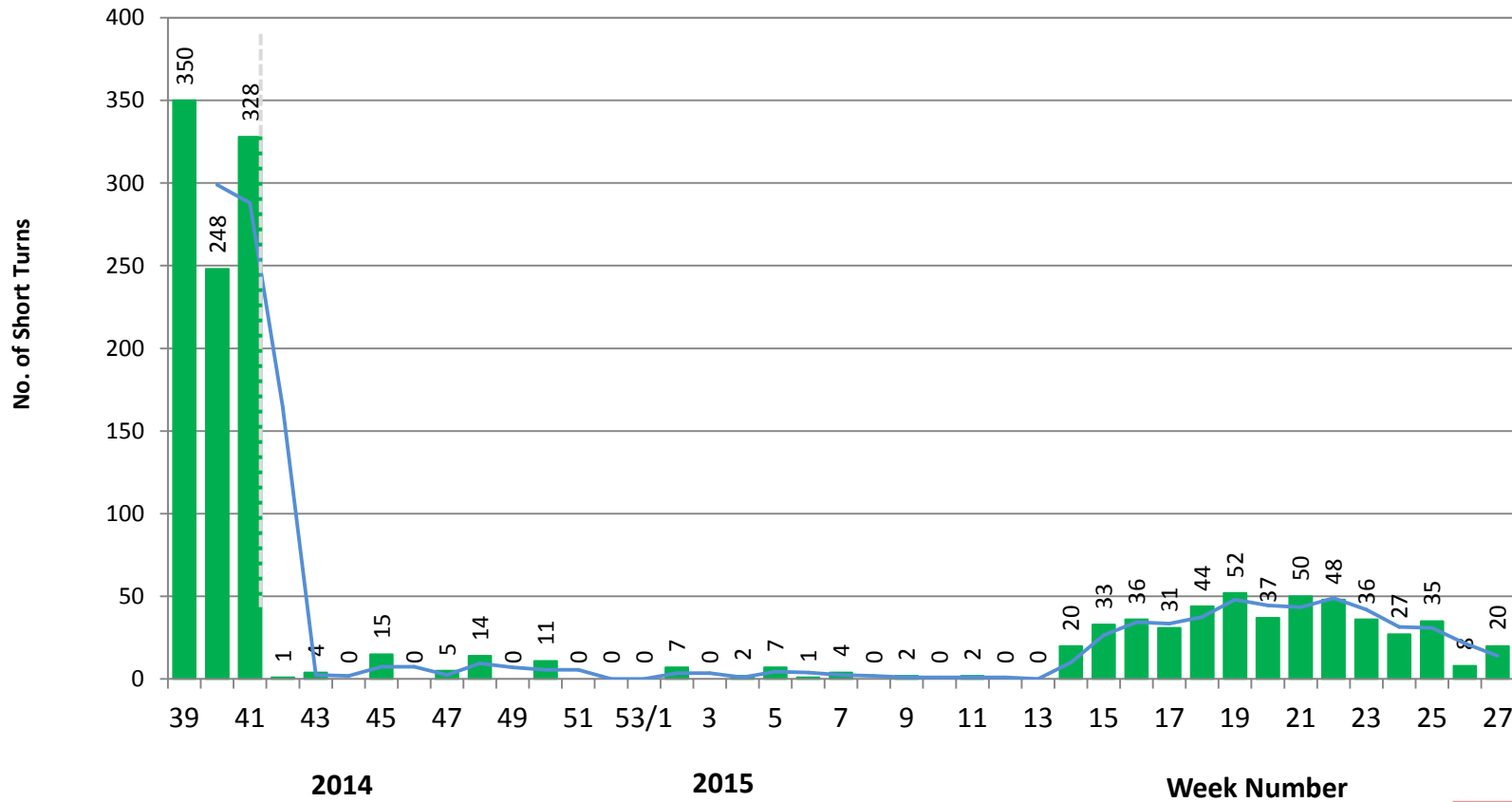


512 ST CLAIR STREETCAR ROUTE – SERVICE IMPROVEMENTS



Reduced number of short turns on 512 St Clair streetcar route are likely to have had a positive impact on customer perceptions.

Short Turns





SUMMARY

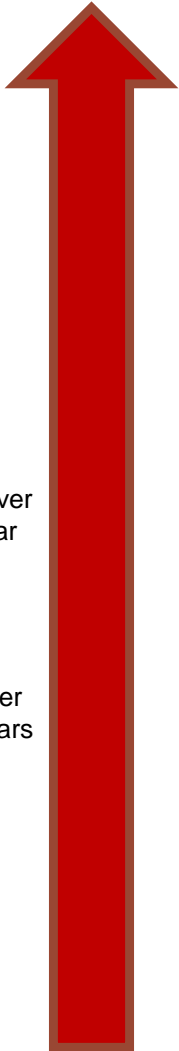


WHAT DRIVES CUSTOMER SATISFACTION?



Key Drivers

Most Influential Factor



Subway

Trip duration

Wait time

Trip smoothness

Vehicle crowding

Staff Helpfulness

Personal safety

Bus

Wait time

Trip duration

Operator helpfulness

Vehicle crowding

Operator appearance

Personal safety

Trip smoothness

Streetcar

Wait time


Trip duration


Vehicle crowding

Operator helpfulness

Trip smoothness

Helpfulness of announcements

 = sig. increase over the last year

 = sig. increase over past two years







Less Influential Factor



FOCUS ON THE BASICS



By focusing on the basics and improving the core reliability of service, we were able to increase levels of customer satisfaction in key areas, such as *wait time, trip duration, and level of crowding inside vehicles* :

- ✓ Revised schedules 
- ✓ Improved route management has reduced short turns 
- ✓ Improved headway performance 
- ✓ Improved train turnaround time at end terminals 
- ✓ Reduced delays 
- ✓ Improved customer safety through implementation of Safe Service Action Plan 





- ✓ Further improvements to route management and reliability through new staffing models and technology
- ✓ Supporting increasing ridership
- ✓ Supporting access to employment and key city services
- ✓ Reduced traffic congestion
- ✓ Reduced CO2 emissions
- ✓ Public transit first



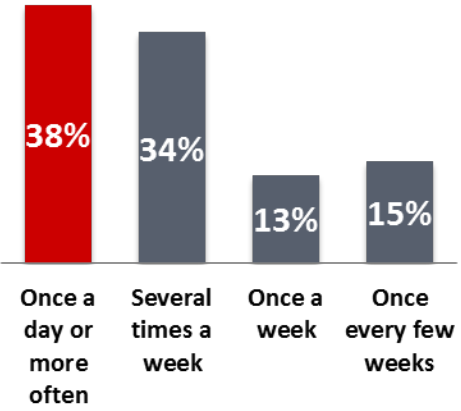
APPENDIX



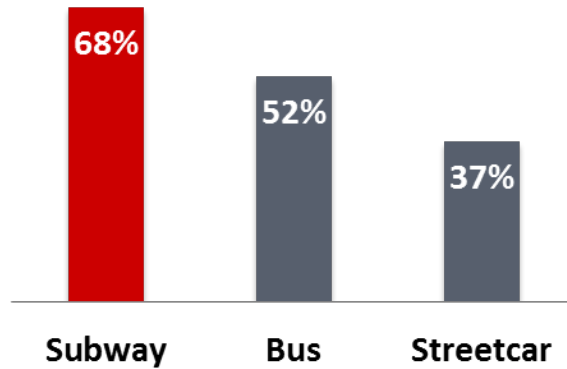
RESPONDENT BEHAVIOURAL PROFILE



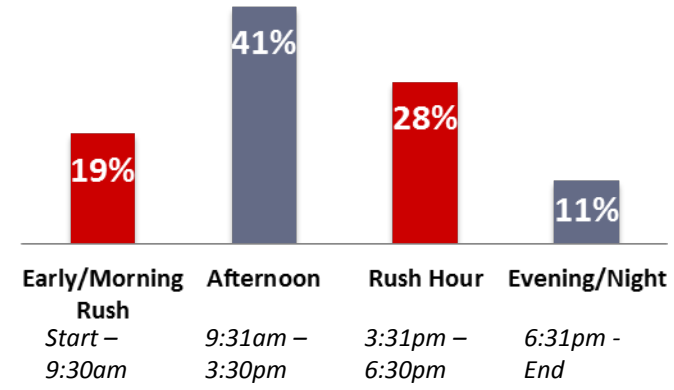
FREQUENCY OF TTC USAGE



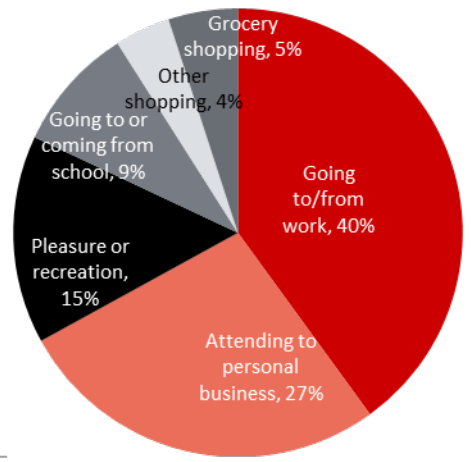
MODE OF TRANSPORTATION OF MOST RECENT TRIP ON TTC



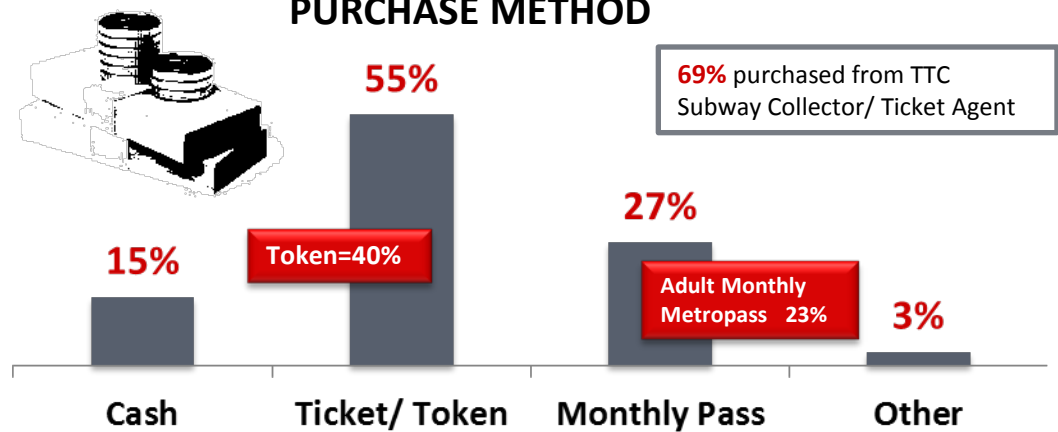
TIME OF DAY OF LAST TRIP



PURPOSE OF LAST TTC TRIP



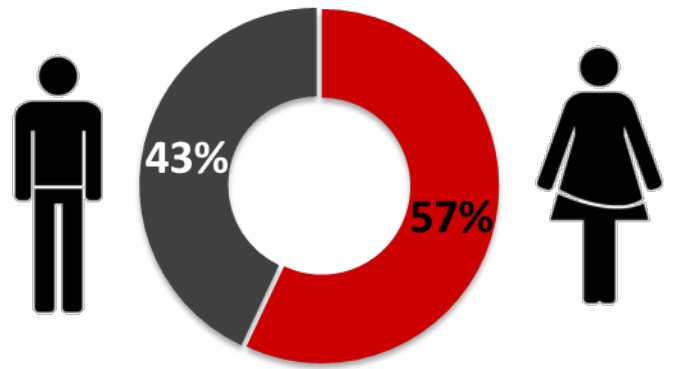
PURCHASE METHOD



RESPONDENT *DEMOGRAPHIC* PROFILE



Gender

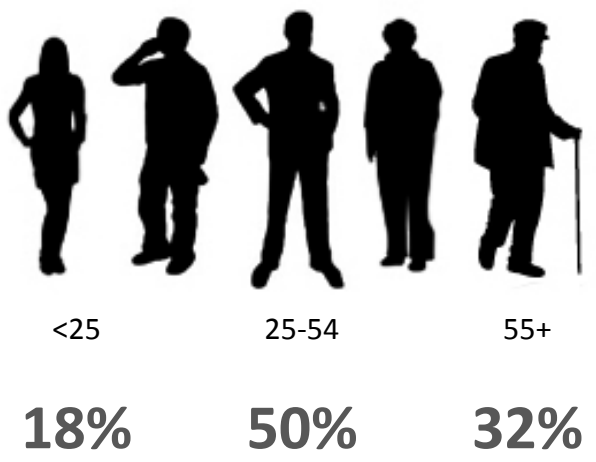


HOUSEHOLD INCOME

- 11% earn <\$30,000
- 7% earn \$30k – under \$45k
- 13% earn \$45k to under \$65k
- 9% earn \$65k – under \$85k
- 29%** earn \$85k +
- 30% DK/Prefer not to answer



AGE DISTRIBUTION



OCCUPATION STATUS

- 63%** work full-time or part-time
- 7% are unemployed or at home
- 13% are students
- 15% are retired

