



## STAFF REPORT INFORMATION ONLY

### Q1-Q2 2016 Customer Satisfaction Survey Results

<b>Date:</b>	September 28, 2016
<b>To:</b>	TTC Board
<b>From:</b>	Chief Executive Officer

### Summary

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Overall customer satisfaction rebounded in Q1 2016 (79%) and remained at the same high levels in Q2 (80%). In 2015, improvements in customer perceptions of key service reliability attributes (*the length of time they waited for the vehicle, trip duration, and the level of crowding inside the vehicle*) led to the highest customer satisfaction score observed in several years, 81%. After a brief decline in Q4 which can be attributed to the removal of very visible PanAm specific service enhancements, overall customer satisfaction has returned to 79% (the proportion of customers who were satisfied with their most recent trip on the TTC). This can be linked to our improved consistency delivering a reliable service, which has led to higher customer perceptions of *trip duration* on buses and streetcars, *wait times* on streetcars and *level of crowding* on buses. Customer perceptions of subway service also remained high.

Customer perceptions of value for money remain high, with 92% saying they received average, good, or excellent value for money on their last TTC trip.

Pride in the TTC and what it means for Toronto also continues to improve. In Q2 2016 73% of customers agreed with this statement compared to 69% of customers a year ago, indicating significantly higher levels of pride compared to last year.

### Financial Summary

There are no financial implications resulting from the adoption of this report. The Chief Financial & Administration Officer has reviewed this report and agrees with the financial impact information

### Comments

The TTC will continue to conduct the Customer Satisfaction Survey (CSS). The Board will be provided with an update on CSS in February 2017.

**Contact**

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

**Attachments**

Q1 –Q2 2016 Customer Satisfaction Survey Results



# Q1- Q2 2016 Customer Satisfaction Survey Results

September 28 2016

Arthur Borkwood – Head of Customer Development





- **Top Line Results**
- **Key Drivers of Satisfaction**
- **Summary**
- **Appendix**





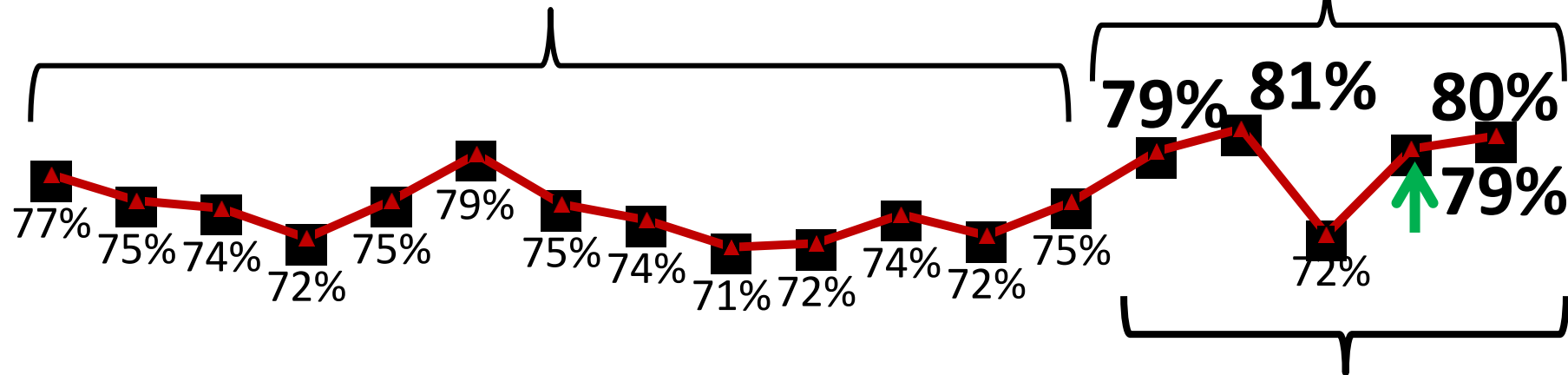
# Top Line Results



# Customer satisfaction has rebounded and remained steady

Q1 2012 – Q1 2015  
74%

Q2 2015 – Q2 2016  
78%



- ↑ Wait times
- ↑ Duration of trip
- ↑ Crowding

Q1'12 Q2'12 Q3'12 Q4'12 Q1'13 Q2'13 Q3'13 Q4'13 Q1'14 Q2'14 Q3'14 Q4'14 Q1'15 Q2'15 Q3'15 Q4'15 Q1'16 Q2'16

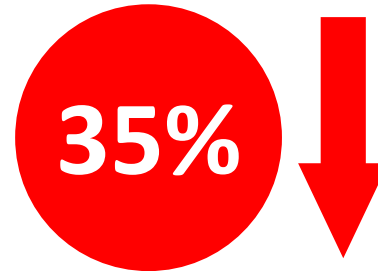
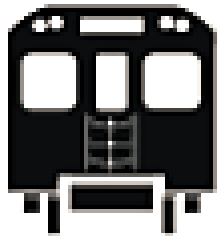


# 2014-2016 service improvements

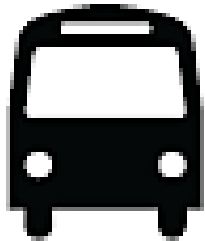


**Delay incidents**

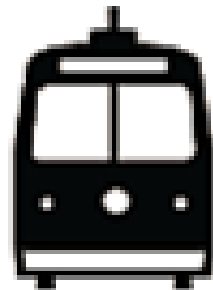
**Delay minutes**



**Short turns a week**



**Short turns a week**



# 2016 service planning improvements

**Q4'15**

**Q1'16**

**Q2'16**

**Increased service on major routes**

**Improved overnight services**

**Operating earlier & later on neighbourhood routes**



**ACCESS TO SERVICES**



**CROWDING  
WAIT TIMES**

**Increased service in peak periods on 25 bus routes**



**CROWDING  
WAIT TIMES**

**New express bus services on five major corridors**



**CAPACITY**

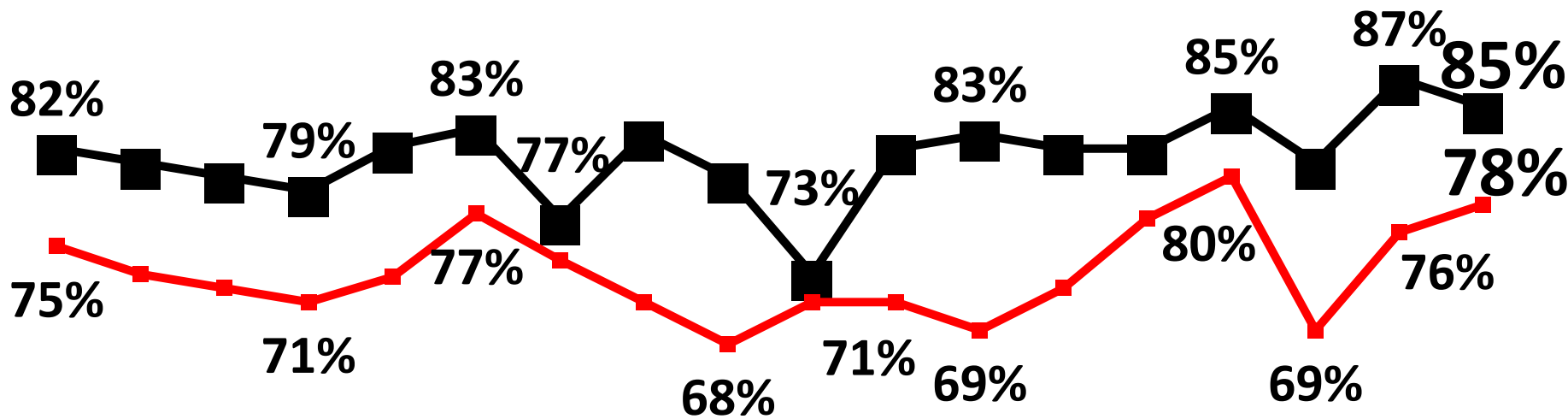


**TRIP TIME**





# Frequent customers are less satisfied

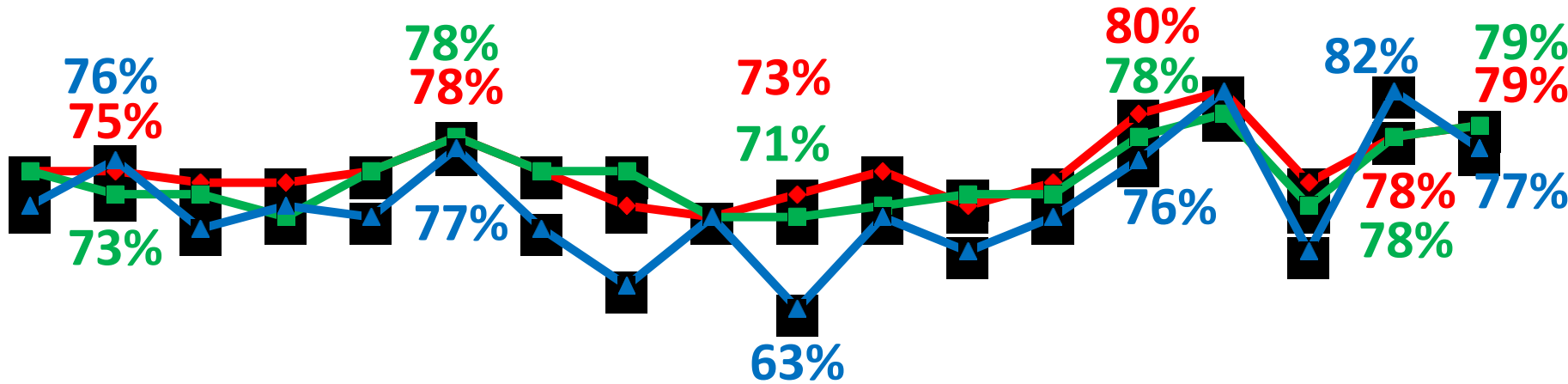


**Occasional: Once a week or less**  
**Frequent: Daily to several times a week**

Q1'12 Q2'12 Q3'12 Q4'12 Q1'13 Q2'13 Q3'13 Q4'13 Q1'14 Q2'14 Q3'14 Q4'14 Q1'15 Q2'15 Q3'15 Q4'15 Q1'16 Q2'16



# Customer satisfaction remains steady for subway & bus riders



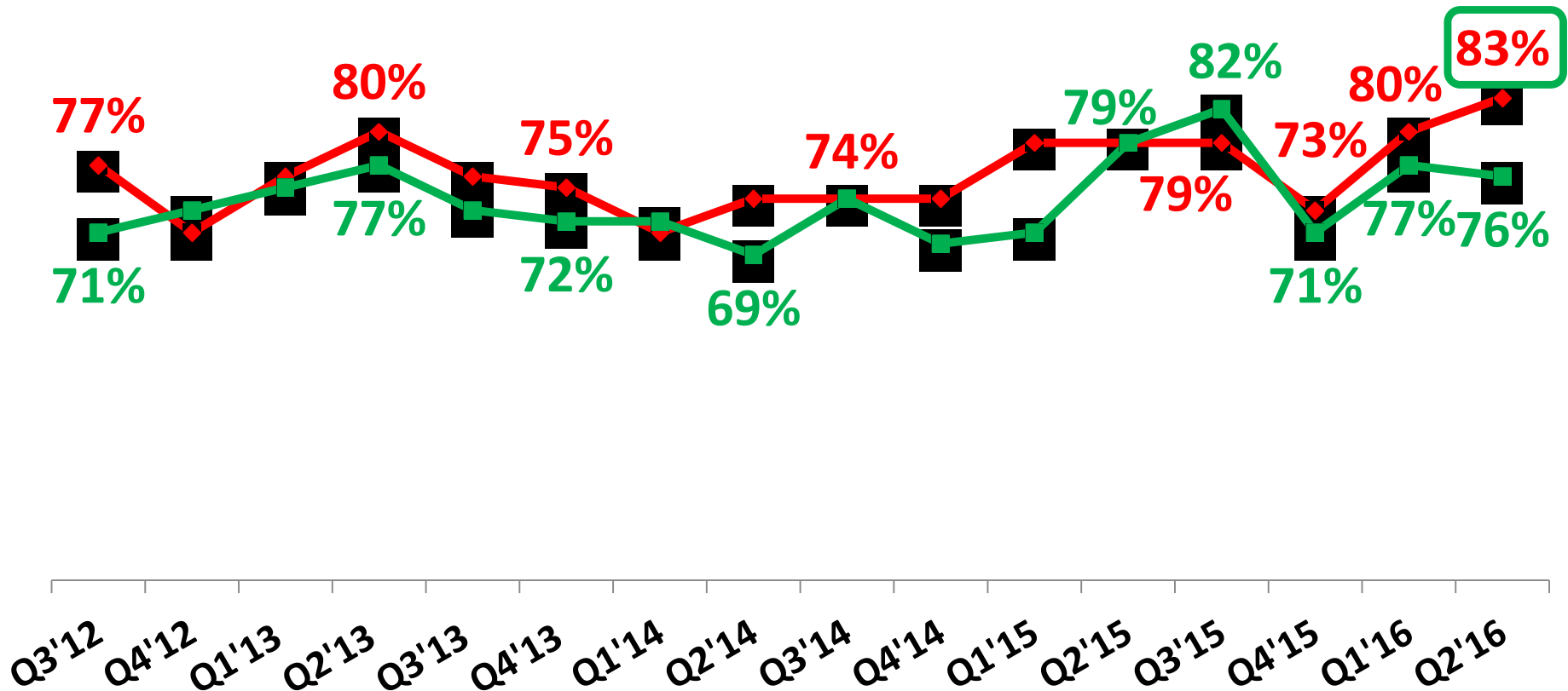
9/21/2016  
□ □ = sig. higher/lower than other subgroups  
↑ ↓ = higher or lower than previous wave or year at C.I. = .95



# Higher customer satisfaction by single mode vs. multi mode



Single Mode Multi Mode

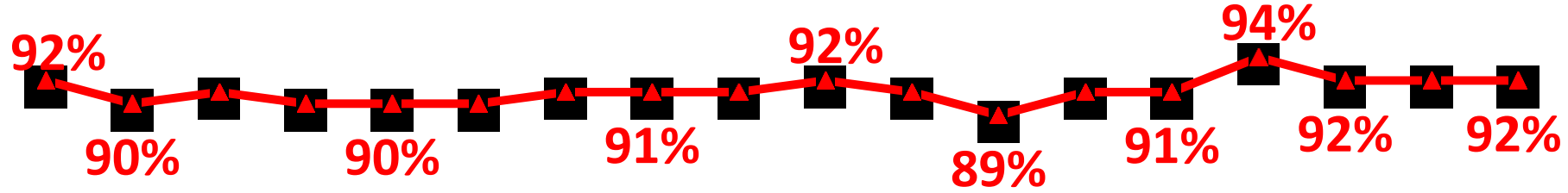


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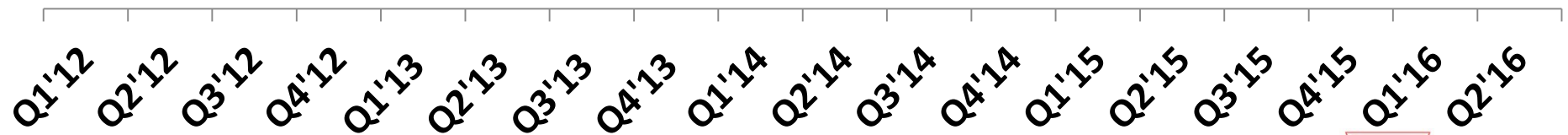
# Perceived value for money over time

**Overall perception of value for money has remained high**  
 (Average/Good/Excellent)



## Good/Excellent

60% 57% 58% 58% 59% 60% 59% 60% 58% 60% 59% 60% 61% 62% 68% 62% 64% 64%



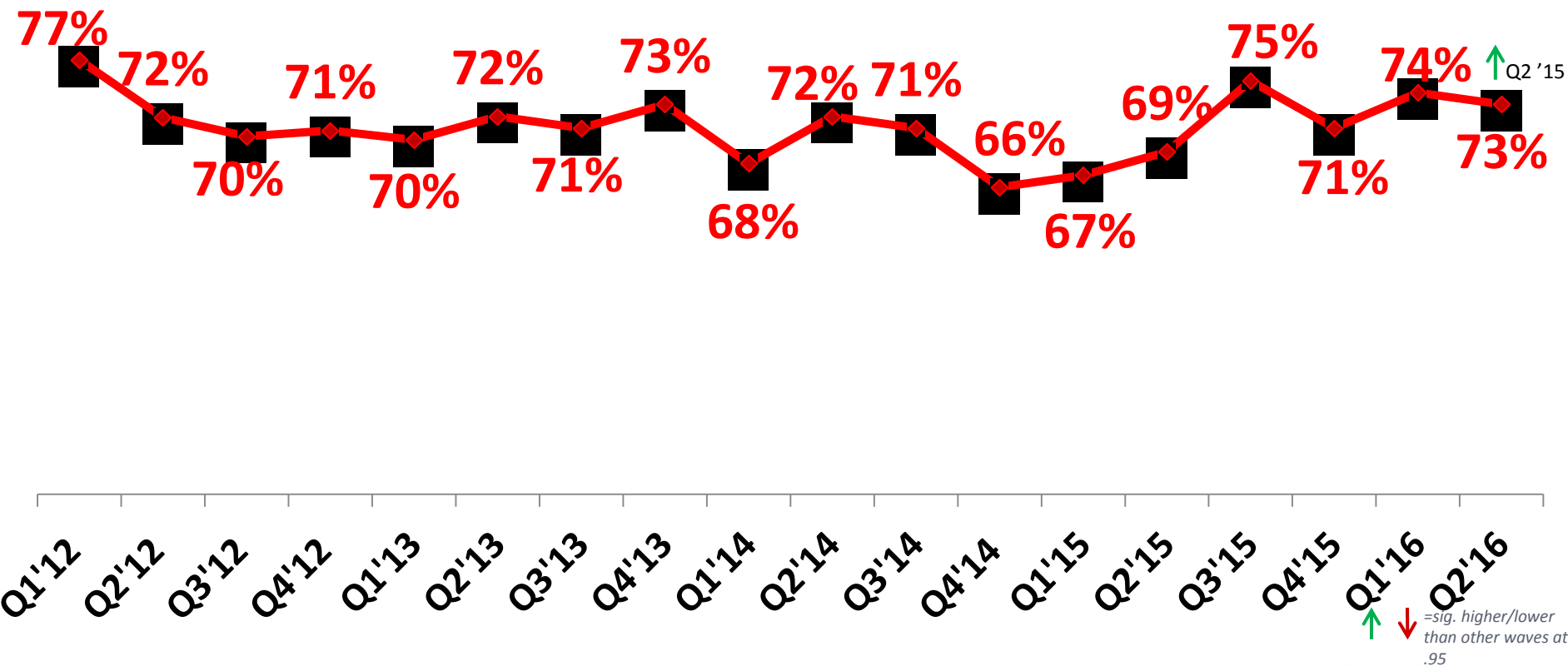
9/21/2016 = higher or lower than previous wave or year at C.I. = .95



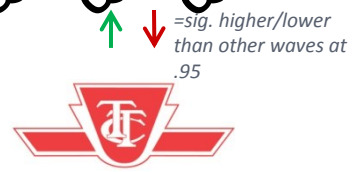
# Pride in the TTC and what it means to Toronto



Pride in the TTC has improved since Q2'15

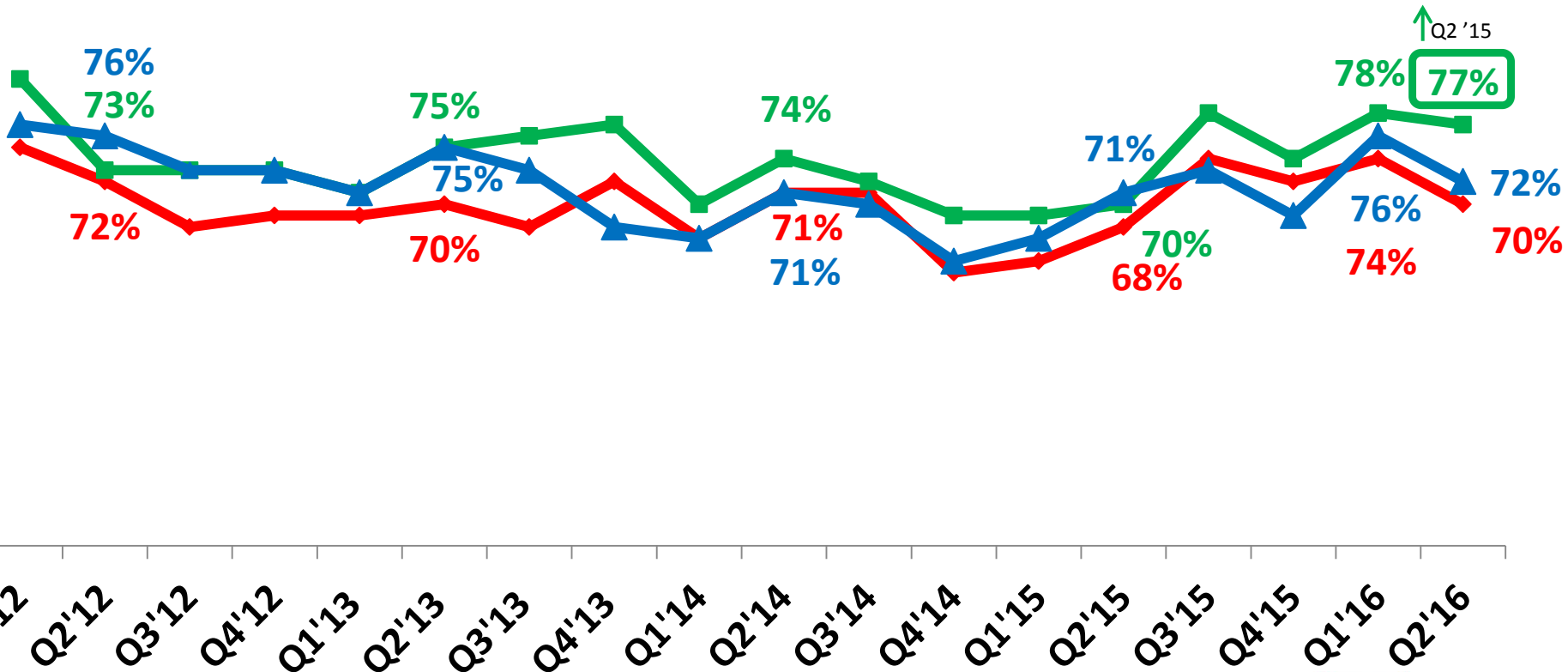


Q18. Can you tell me if you agree, disagree or have no opinion about these statements?  
9/21/2016 Let's start with [READ FIRST STATEMENT]. Do you \_\_\_\_



# Pride in the TTC is highest amongst bus riders

## Pride in the TTC By Mode Over Time



□ □ = sig. higher/lower than other subgroups  
↑ ↓ = higher or lower than previous wave or year at C.I. = .95



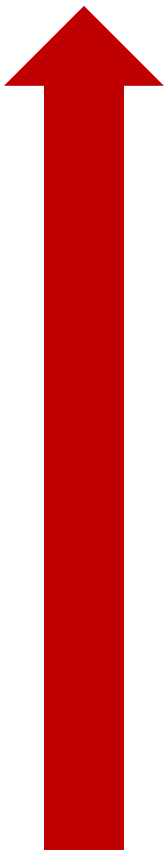


# Key Drivers

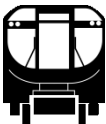


# Key drivers of customer satisfaction


**Most Influential**




**Less Influential**

 **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 announcement





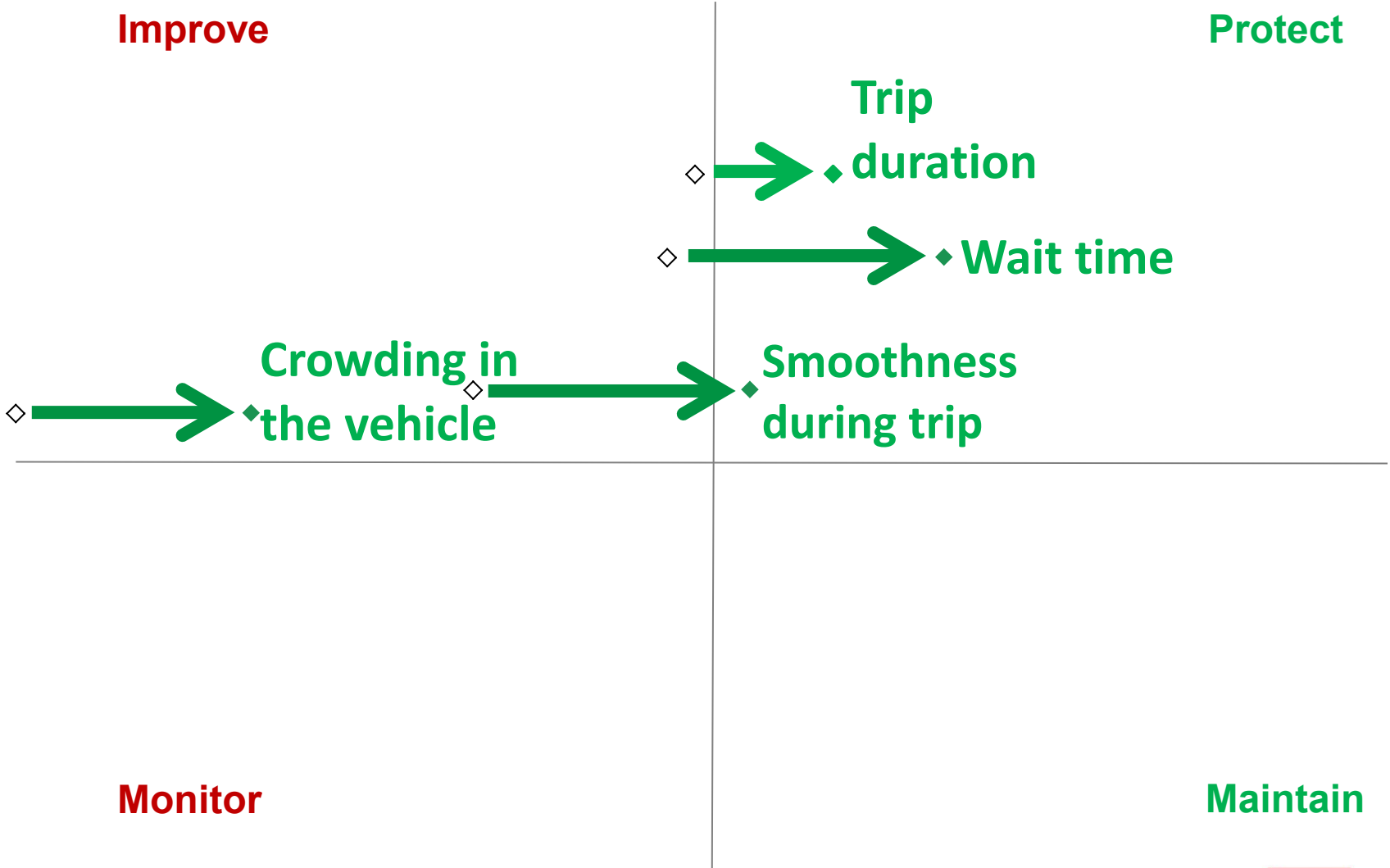


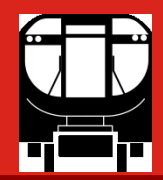
## Overall Satisfaction – Importance vs. Performance Maps: Subway

Improve

Protect

Impact on Overall Satisfaction





2012 – 2016

# Customer Service & Environment

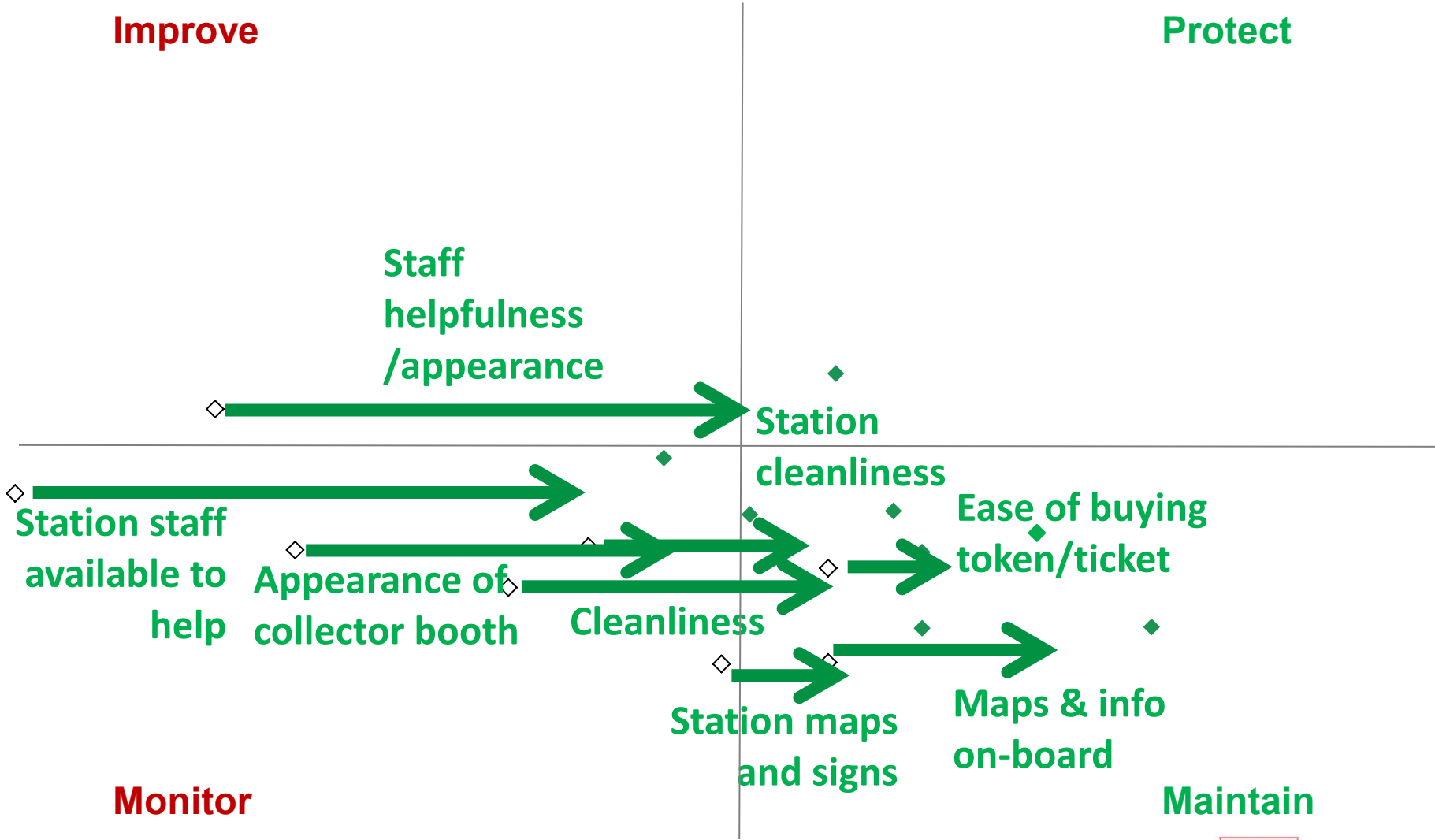


### Overall Satisfaction – Importance vs. Performance Maps: Subway

**Improve**

**Protect**

**Impact on Overall Satisfaction**



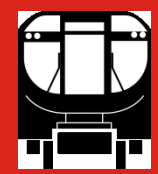
**Monitor**

**Maintain**

**Overall Satisfaction Performance**

9/21/2016





# 2012 – 2016 Announcements

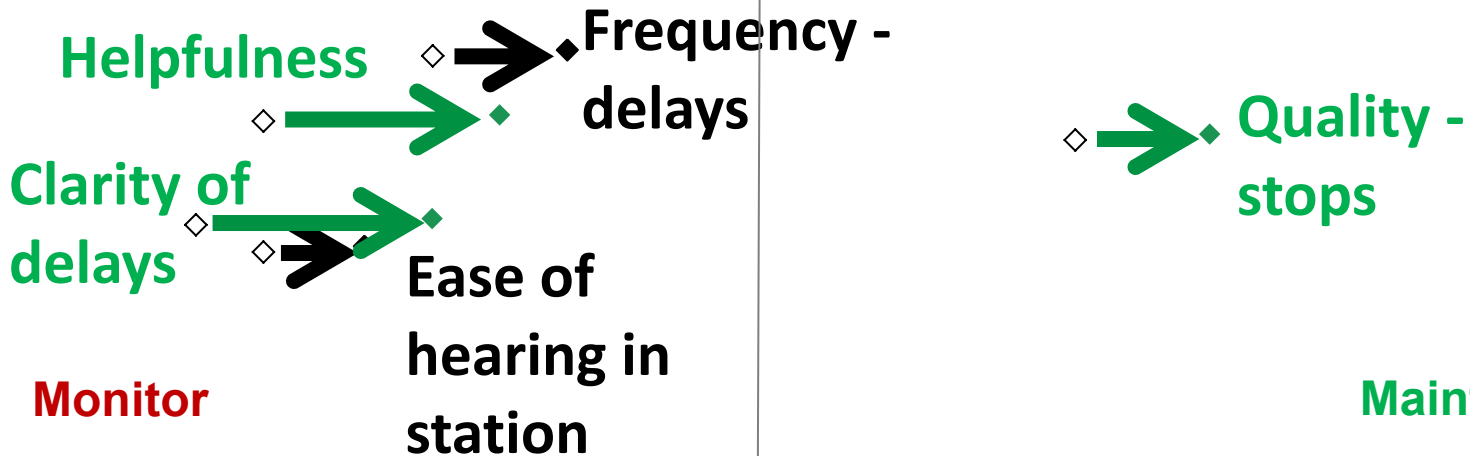


## Overall Satisfaction – Importance vs. Performance Maps: Subway

**Improve**

**Protect**

**Impact on Overall Satisfaction**



**Monitor**

**Maintain**

**Overall Satisfaction Performance**



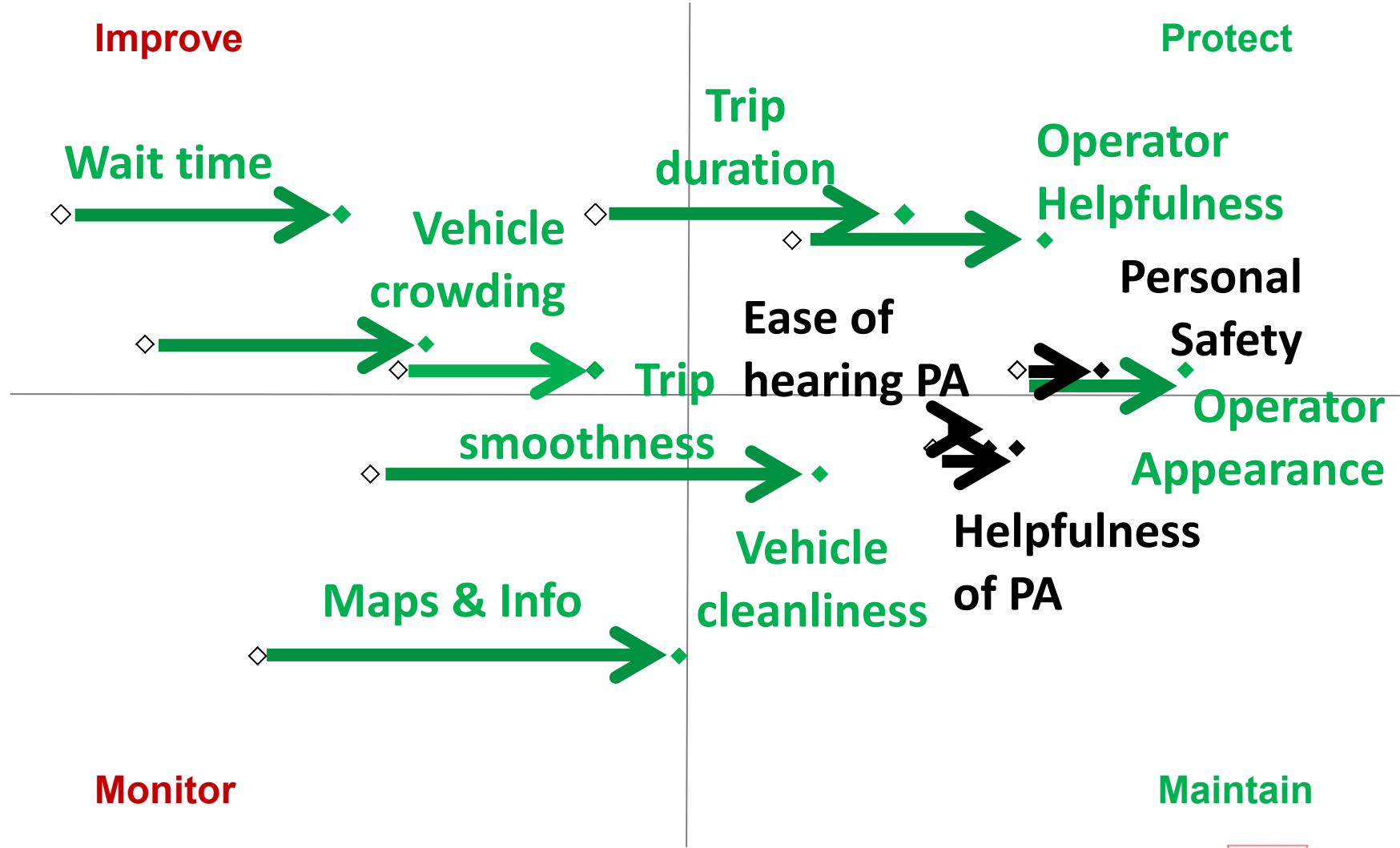


# 2012 – 2016 Trip Experience



### Overall Satisfaction – Importance vs. Performance Maps: Bus

Impact on Overall Satisfaction



Monitor

Maintain

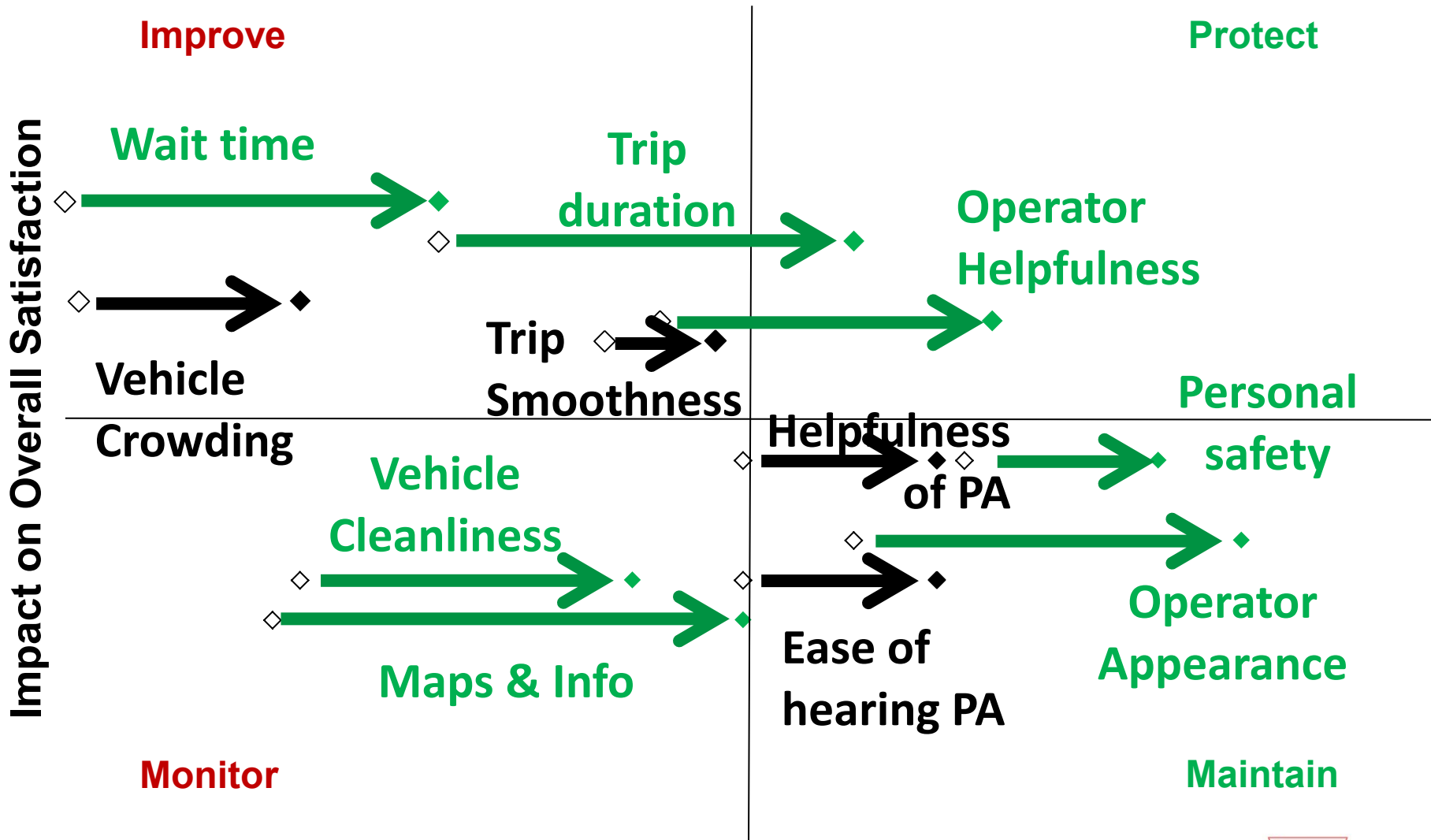




# 2012 – 2016 Trip Experience



## Overall Satisfaction – Importance vs. Performance Maps: Streetcar





# Summary



# Key focus areas

## □ **Communications and announcements**

- Improve the helpfulness, frequency, audibility, and clarity of announcements on all modes.



## □ **Comfort and convenience**

- The customer experience would improve with reduced crowding on all modes, and improving wait times on surface modes.



## □ **Customer interaction with station staff**

- Station staff have a direct influence over several dimensions that have improved over the past four years, but still has room to grow.



# How we are addressing the issues



## **Communications and announcements**

- Improved customer-facing language and standards for service alerts
- Use of professional voiceover artist for pre-recorded announcements
- Standards for type, frequency and content of pre-recorded public address announcements
- Implementation of external route (pre-boarding) announcement system on all modes

## **Comfort and convenience**

- Improved schedules on 32 bus and streetcar routes to improve reliability and travel times (+ new streetcars!)

## **Helpfulness of station staff**

- Customer Service Standards and Stations Transformation







# Appendix



# Methodology



**Method** 10-minute telephone survey

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**Respondents** 100% City of Toronto residents  
Aged 13 years old +  
TTC user at least once every few weeks or more frequently  
Standard industry exclusions

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**Timing** April 2016 – June 2016

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**Sample Size** n = 1,000

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**Changes for Q1** Added announcement specific statements to bus and streetcar (the quality, clarity, and frequency)

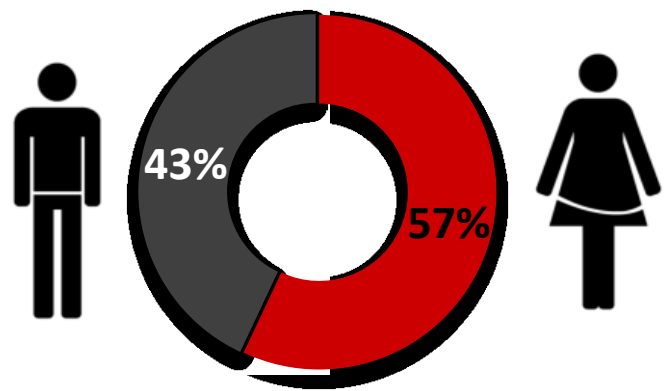
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# Respondent *Demographic* Profile



## Gender

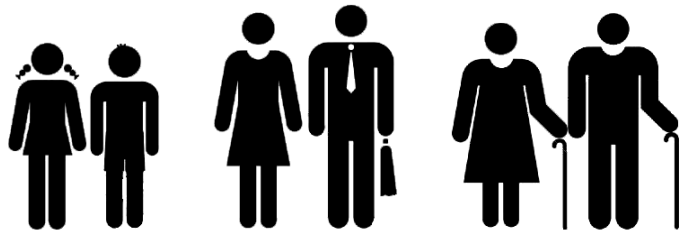


## HOUSEHOLD INCOME

**19%** Under \$45,000  
**57%** \$45,000 +  
24% DK/NA



## AGE DISTRIBUTION



Age Group	Percentage
<25	16%
25-54	52%
55-70	25%
71+	6%



## OCCUPATION STATUS

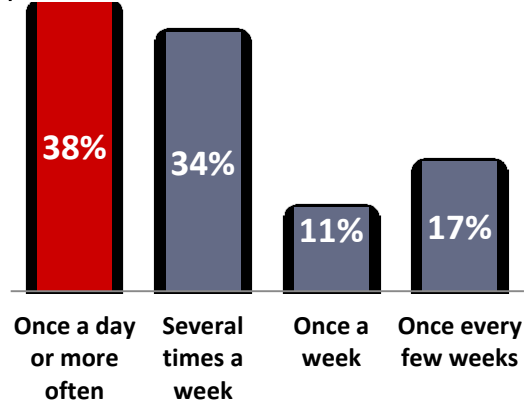
**64%** Work full-time or part-time  
**8%** Unemployed or at home  
**11%** Student  
**15%** Retired  
2% DK/NA



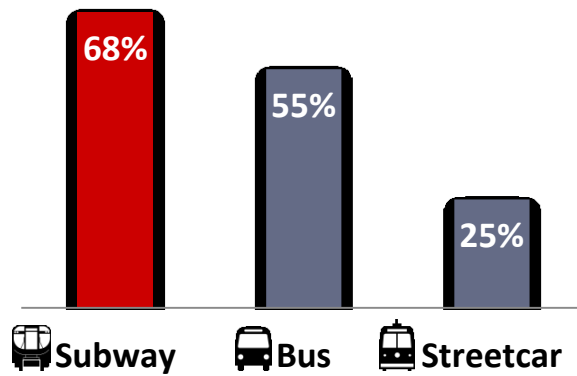
# Respondent Behavioural Profile



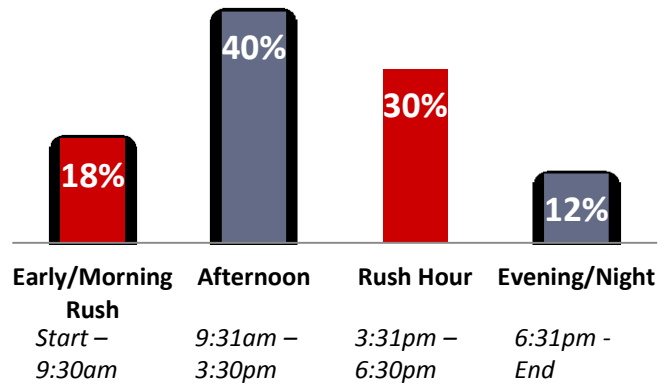
**FREQUENCY OF TTC USAGE**



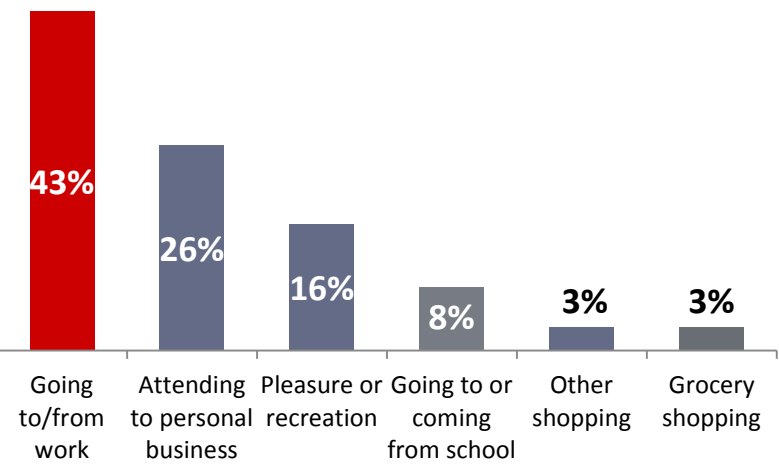
**MODE OF TRANSPORTATION OF MOST RECENT TRIP ON TTC**



**TIME OF DAY OF LAST TRIP**



**PURPOSE OF LAST TTC TRIP**



**PURCHASE METHOD**

