



STAFF REPORT INFORMATION ONLY

2016 Customer Satisfaction Survey Results (including Wheel-Trans)

Date:	February 21, 2017
To:	TTC Board
From:	Chief Executive Officer

Summary

At the start of 2016, perceptions of overall customer satisfaction with the TTC (bus, streetcar & subway) were holding high, with eight-in-ten customers being satisfied (Q1'16: 79%; Q2'16: 80%). Despite the decline in scores in Q3'2016, when a less comfortable ride (hot subway cars) had a negative effect on perceptions of trip duration and wait time, ultimately leading to lower overall satisfaction scores (70%), customer perceptions improved significantly in Q4, with 77% of customers being satisfied with their most recent trip on the TTC. Closing out 2016 with overall average satisfaction of 77% is in line with the average satisfaction score in 2015 (77%). The average for the last two years has been significantly higher than the previous years' annual average of 74%.

This return to high perceptions of overall customer satisfaction in Q4'16 is witnessed across all modes of ridership: subway riders' overall satisfaction increased significantly from 69% in Q3'16 to 78% in Q4'16; bus riders' satisfaction scores increased significantly from 68% in Q3'16 to 77% in Q4'16; and, while not statistically significant, we also see streetcar riders' satisfaction scores moving from 69% in Q3'16 to 72% in Q4'16.

Perceptions of overall customer satisfaction are driven by numerous service attributes that are measured across all three modes; bus, streetcar and subway). The top three key drivers across all three modes are: *wait time*, comfort of the ride, and *trip duration*.

The areas of highest customer satisfaction in Q4 ($\geq 80\%$) include:

- helpfulness of maps and signs at station (subway),
- cleanliness of station (subway),
- ease of getting to train platform (subway),
- ease of using or paying for fare (subway, bus, streetcar),
- personal safety during trip (subway, bus, streetcar),
- maps and information inside the vehicle (subway),
- quality of stop announcements (subway, bus, streetcar),
- ease of hearing announcements (bus, streetcar),

- helpfulness of announcements (bus, streetcar),
- helpfulness and appearance of operator (bus, streetcar).

Pride in the TTC remains consistent wave-to-wave and year-over-year, with 71% of customers agreeing they are proud of the TTC and what it means to Toronto. We also see perceptions of value for money remaining consistent wave-to-wave, with nine in ten customers indicating they received average or better value for money on their last trip (Q4'16 & Q3'16: 91%; Q4'15 92%).

Customer satisfaction with Wheel-Trans services continued to be very high in 2016 (88%, a significant increase from a high score of 85% in 2015 and 2014) and is consistent across all vehicle types (accessible minivan, Wheel-Trans bus, and sedan taxi). Such a positive Wheel-Trans customer satisfaction score has had a similar impact on perceptions of Pride - the majority of Wheel-Trans customers (89%) are proud of the TTC and what it means to Toronto.

Financial Summary

There are no financial implications resulting from the adoption of this report.

Comments

The TTC will continue to conduct the Customer Satisfaction Survey (CSS) and Wheel-Trans Satisfaction Survey in 2017. The Board will be provided with an update on CSS in September 2017.

Contact

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Attachments

Presentation: 2016 Customer Satisfaction Survey Results (including Wheel-Trans)



2016 Customer Satisfaction Survey Results (including Wheel-Trans)

February 21, 2017

Arthur Borkwood, Head - Customer Development



Objectives of CSS



Background

- One of the critical measures of perceptions about the TTC (other studies include: Mystery Shopper Survey, Employee Engagement Survey, and Stakeholder Satisfaction Survey),
- A survey to better understand the unique needs, concerns, and obstacles riders face, especially for Wheel-Trans customers,
- 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,
- Identifying major obstacles that prevent customers with physical disabilities from using conventional services (Wheel-Trans CSS),
- Use insights to develop action plans and improve customer satisfaction with all of the TTC's services



Methodology of CSS



Method 10 minute telephone survey



Wheel-Trans

Online survey

-
- Respondents**
- City of Toronto residents
 - At least 13 years old
 - Use TTC at least once every few weeks or more
- Wheel-Trans users as per TTC's contact list
 - Use Wheel-Trans at least once in the past 12 months or more

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- Timing**
- Quarterly
 - Conducted over a period of 3 months to ensure sample is equally distributed by month.
- Annually
 - November 9th to November 22nd, 2016

Sample Size 1,000

2,211



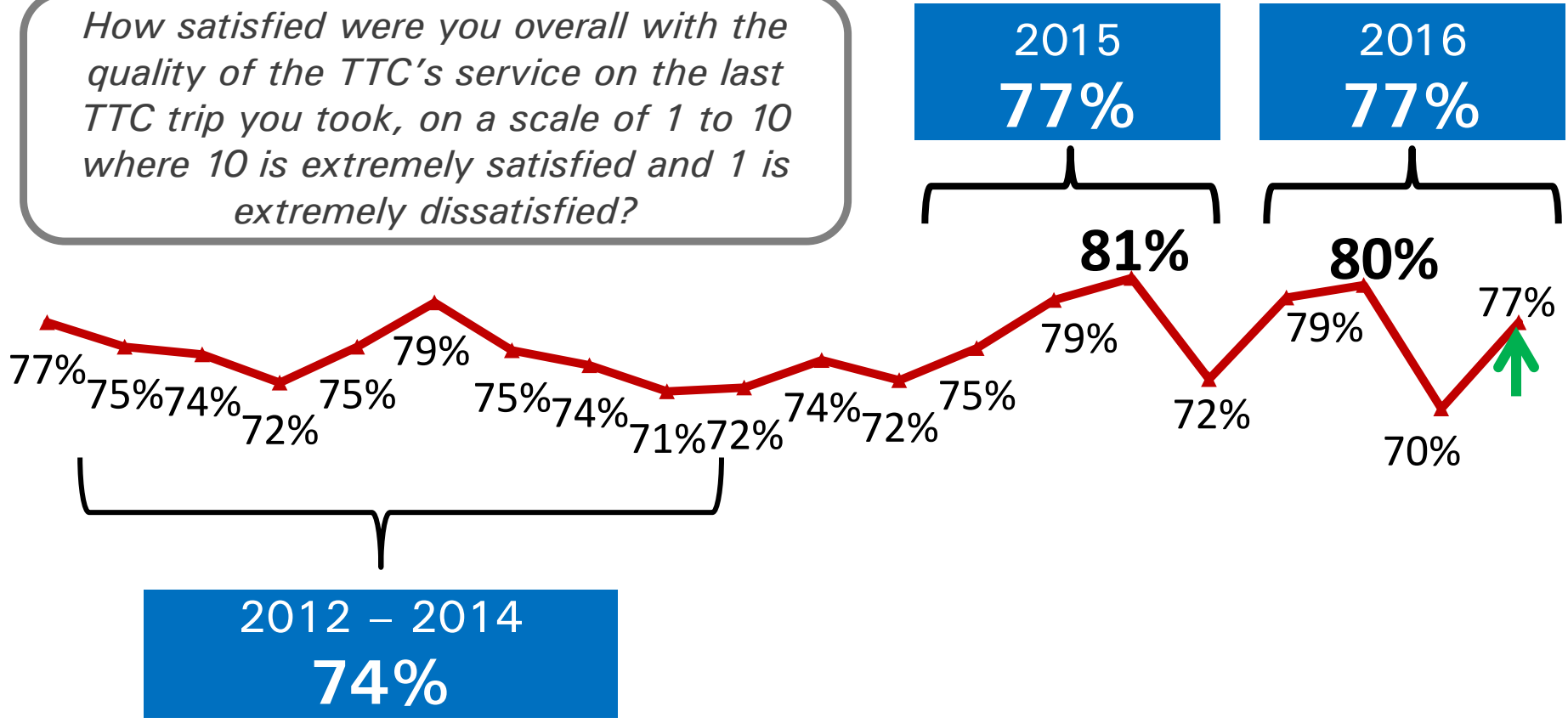


Top Line Results



Overall customer satisfaction

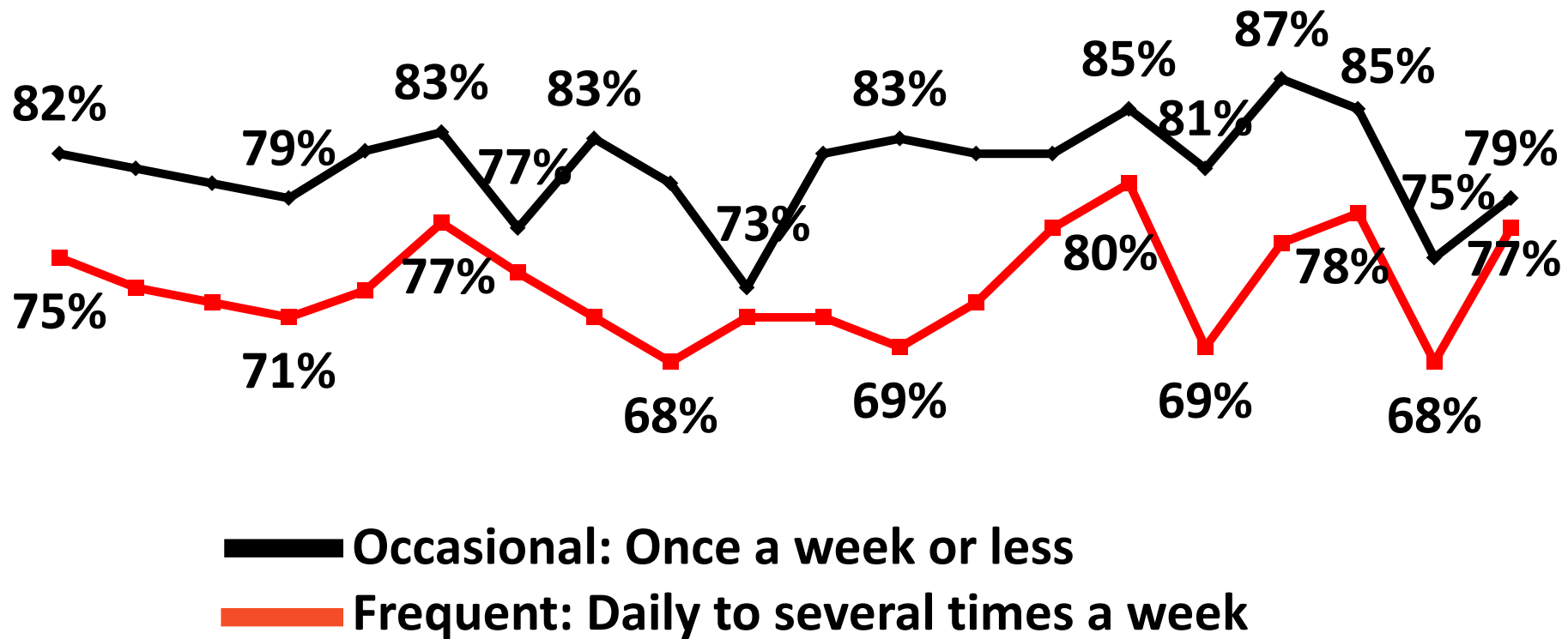
How satisfied were you overall with the quality of the TTC's service on the last TTC trip you took, on a scale of 1 to 10 where 10 is extremely satisfied and 1 is extremely dissatisfied?



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 Q3'16 Q4'16



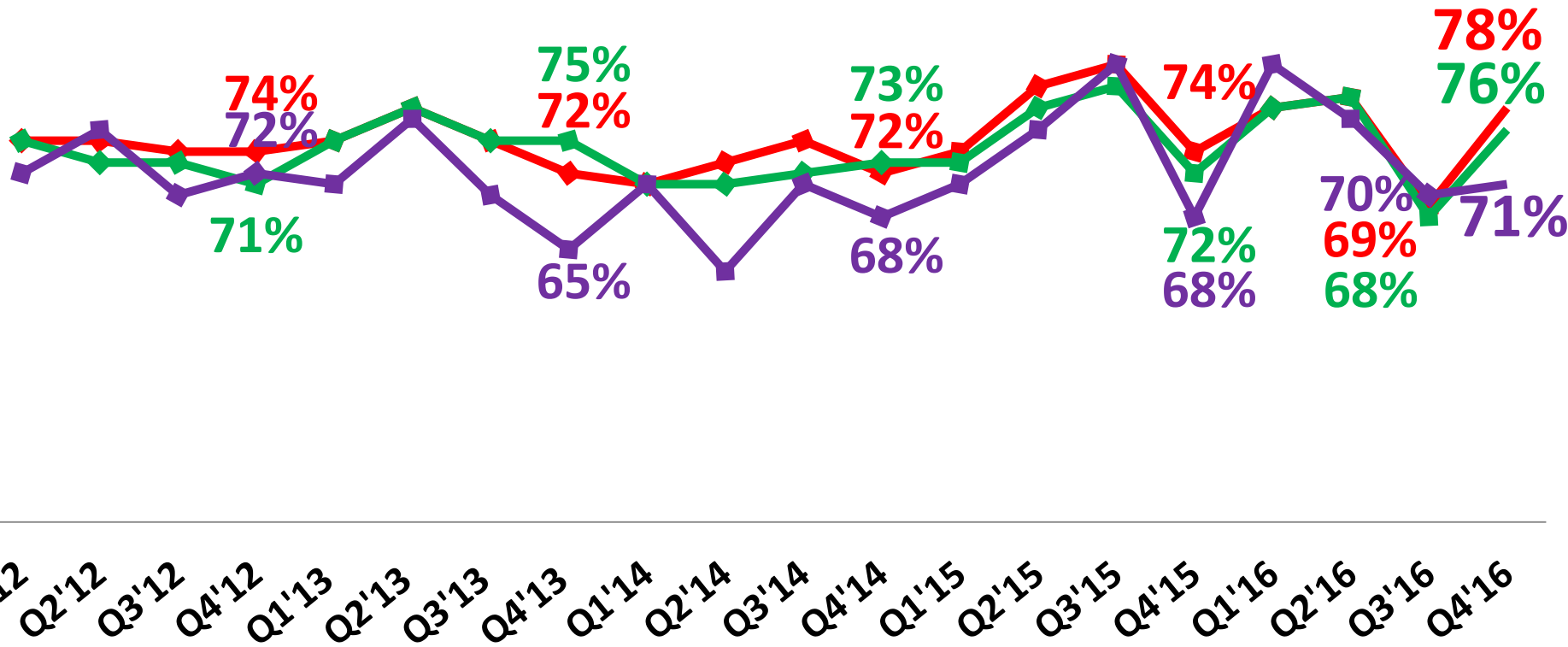
Customer satisfaction by frequency of usage



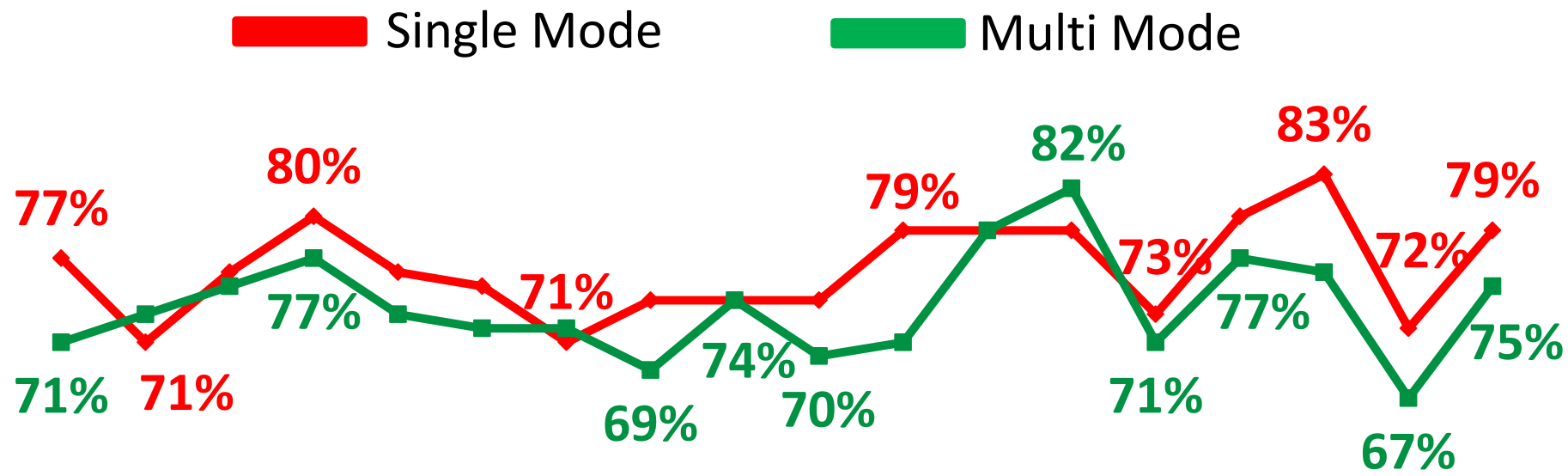
Q1'12 Q2'12 Q3'12 Q4'12 Q1'13 Q2'13 Q3'13 Q4'13 Q1'14 Q2'14 Q3'14 Q4'14 Q1'15 Q2'15 Q3'15 Q4'15 Q1'16 Q2'16 Q3'16 Q4'16



Customer satisfaction by mode



Single mode versus multi mode

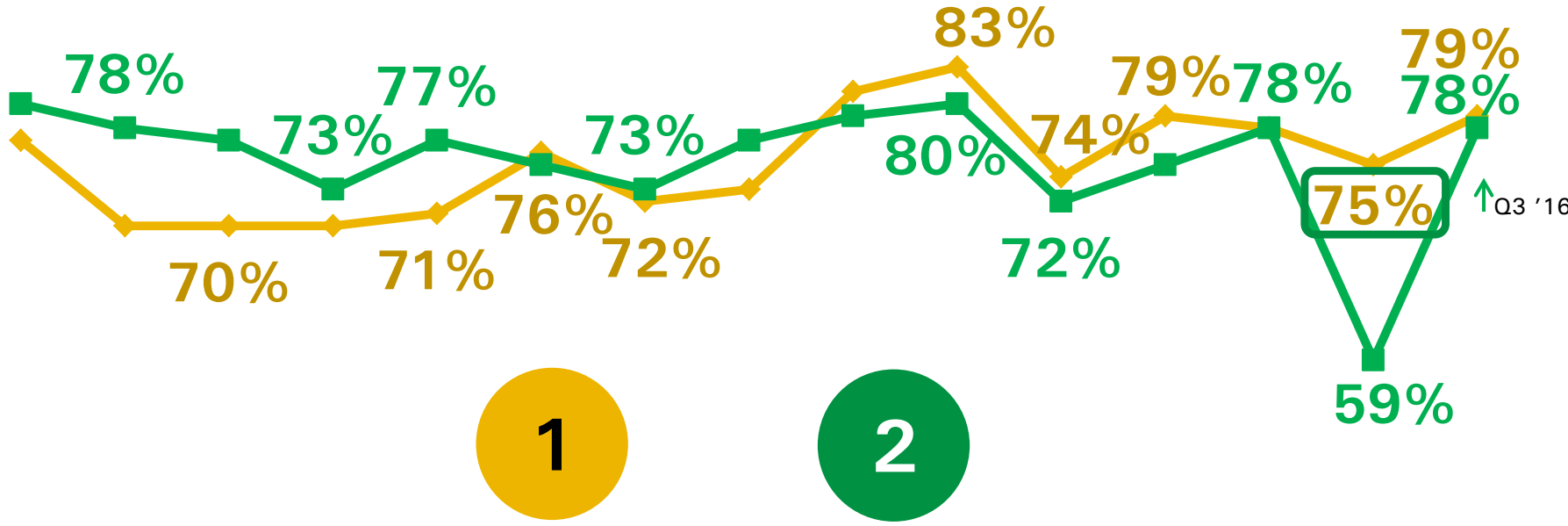


Q3'12 Q4'12 Q1'13 Q2'13 Q3'13 Q4'13 Q1'14 Q2'14 Q3'14 Q4'14 Q1'15 Q2'15 Q3'15 Q4'15 Q1'16 Q2'16 Q3'16 Q4'16

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



Satisfaction by subway line



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 Q3'16 Q4'16

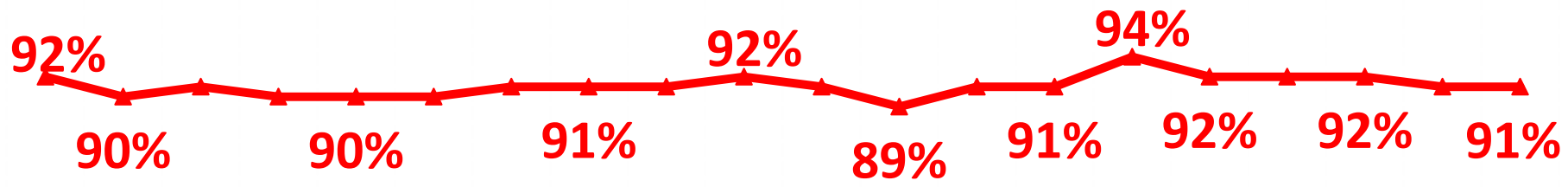
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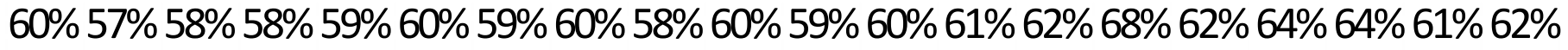
Perceptions of value for money



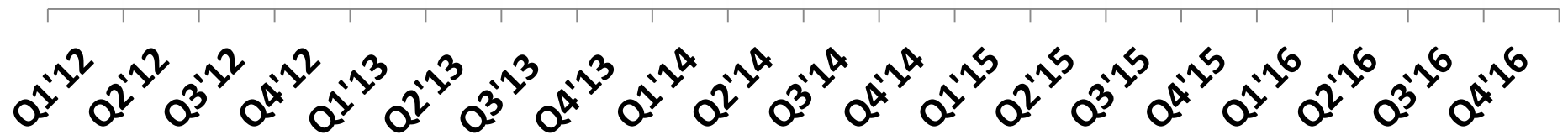
Average/Good/Excellent



Good/Excellent



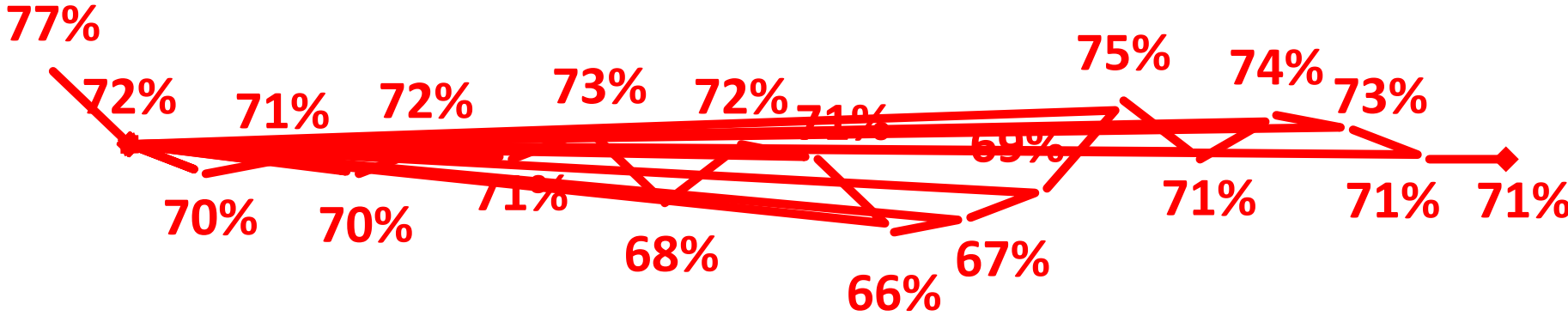
On your last TTC trip would you say you received [excellent/good/average/below average/poor] value for your money?



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Pride in the TTC

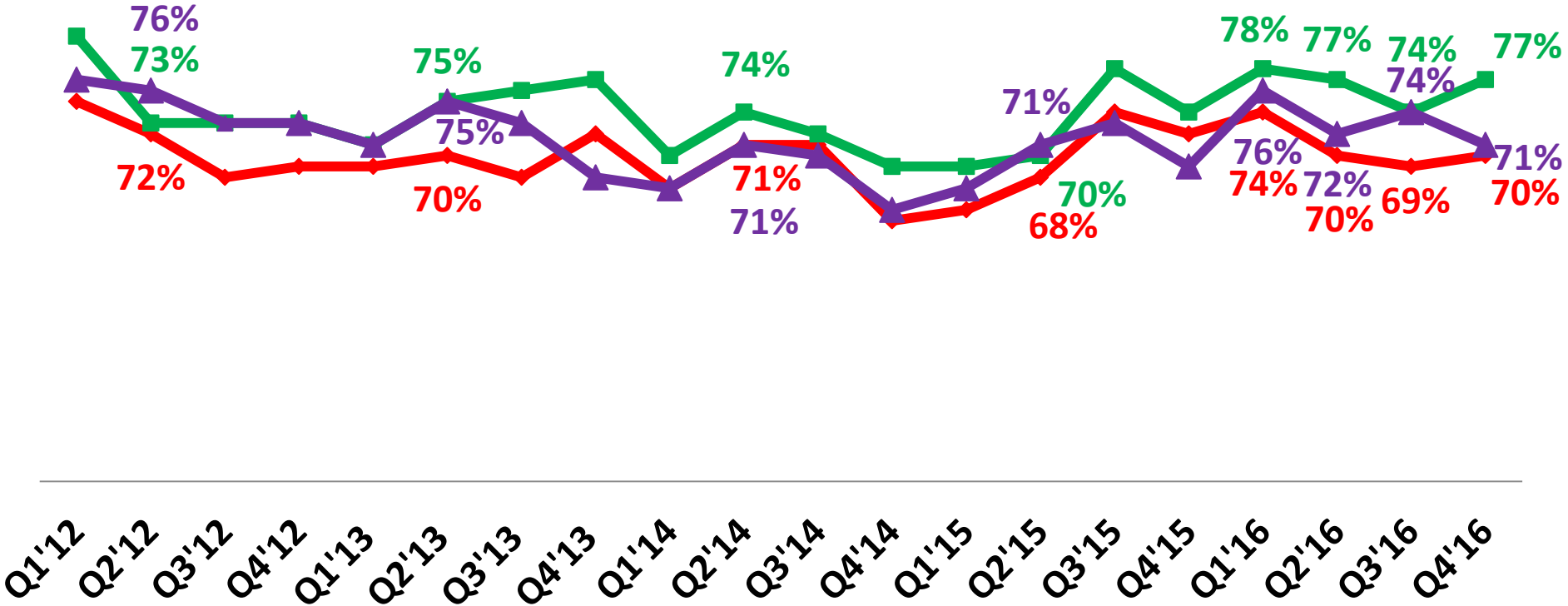


Can you tell me if you agree, disagree or have no opinion about this statement? "I am proud of the TTC & what it means to Toronto."

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 Q3'16 Q4'16



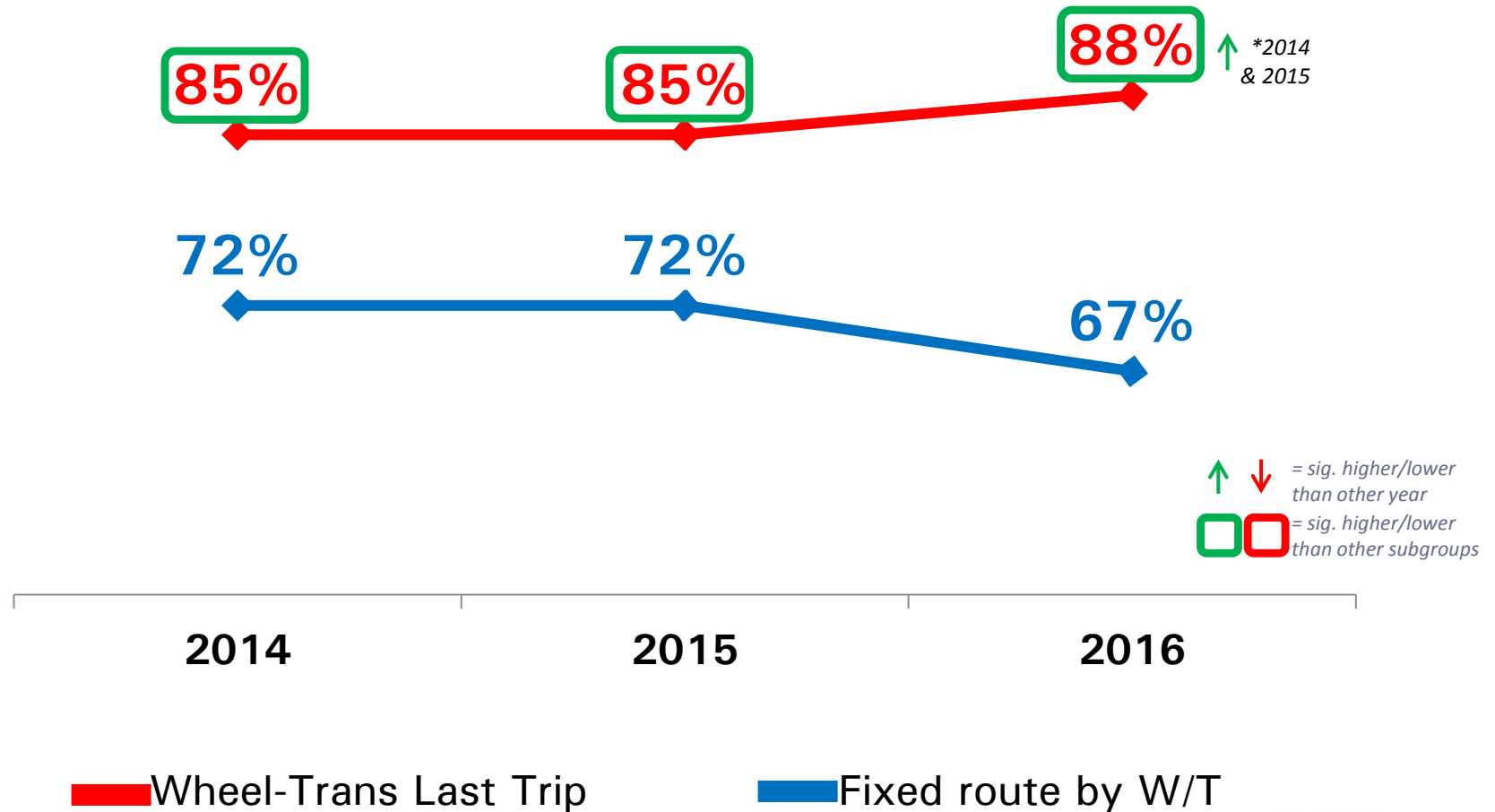
Pride in the TTC by mode



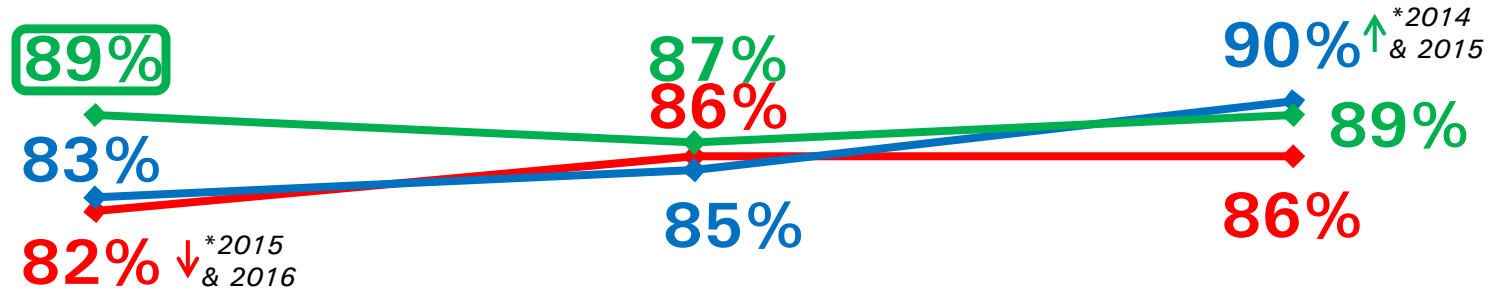
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Gap between Wheel-Trans and fixed route



Increasing satisfaction for W/T bus riders



2014

2015

2016

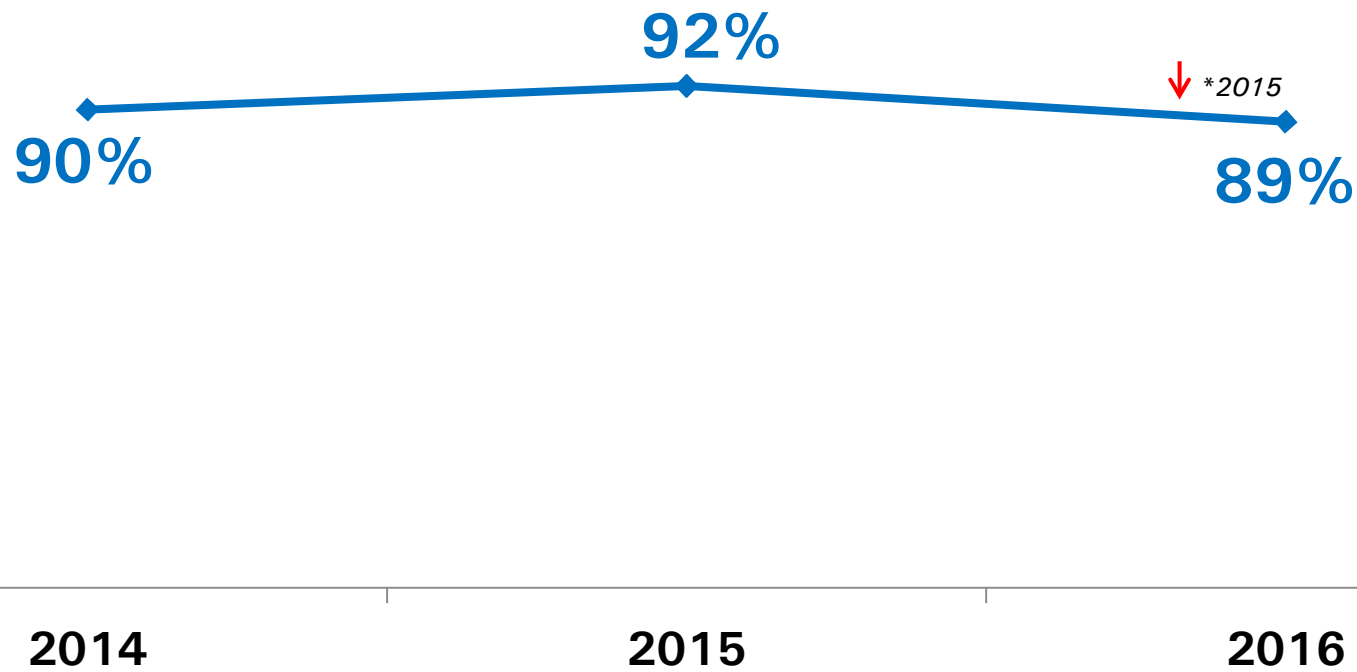
■ Wheel-Trans Bus
 ■ Accessible minivan
 ■ Sedan taxi

↑ ↓ = sig. higher/lower than other year
□ □ = sig. higher/lower than other subgroups

Q3. How satisfied were you overall with the quality of service on the last Wheel-Trans trip you took, on a scale of 1 to 10, where 10 is 'extremely satisfied' and 1 is 'extremely dissatisfied'?



Pride remains very high for W/T riders





Key Drivers



What drives customer satisfaction?

Key Drivers 2016

Most
Influential
Factor



Subway

- Trip duration
- Comfort of ride
- Wait time
- Vehicle crowding
- Cleanliness of station
- Trip smoothness



Bus

- Wait time
- Comfort of ride
- Trip duration
- Vehicle crowding
- Operator helpfulness
- Frequency of delay annnc.
- Personal Safety



Streetcar

- Wait time
- Comfort of ride
- Trip duration
- Frequency of delay annnc.
- Vehicle crowding
- Ease of using fare



Wheel-Trans

- Driver punctuality
- Driver courtesy
- Trip duration
- Driver helpfulness
- Personal safety
- Comfort of ride
- Driver appearance
- Smoothness of trip

Indicates a metric with $\geq 80\%$ satisfaction in Q4'16

Less
Influential
Factor





Trend highlights



Trip duration



Subway

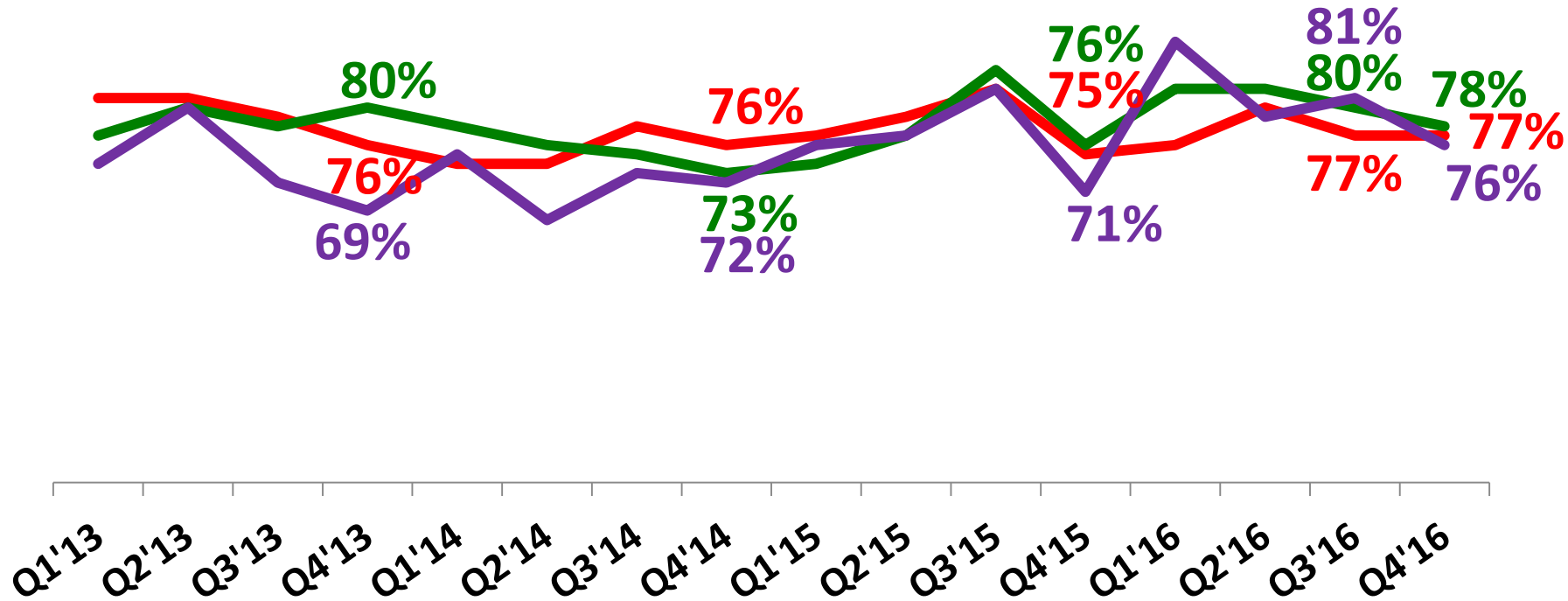


Bus



Streetcar

% of Respondents Rating 7-10



Wait times



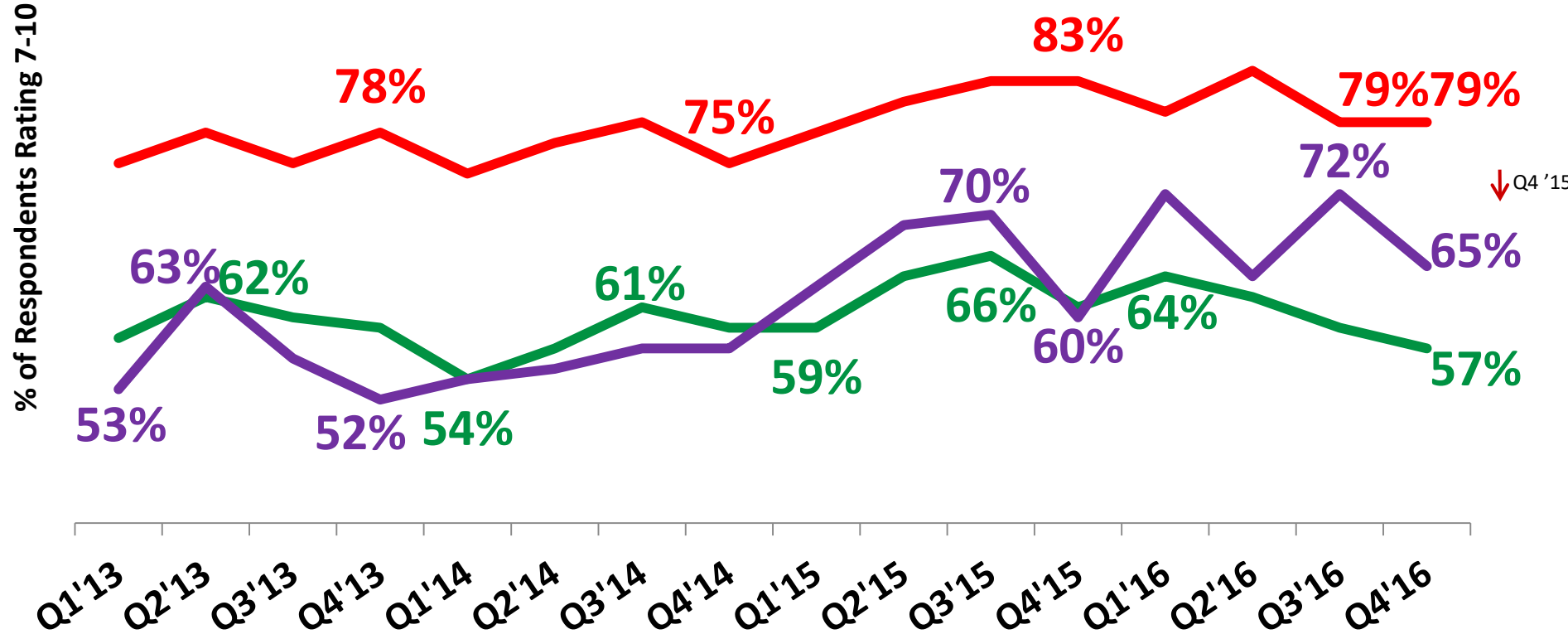
Subway



Bus



Streetcar



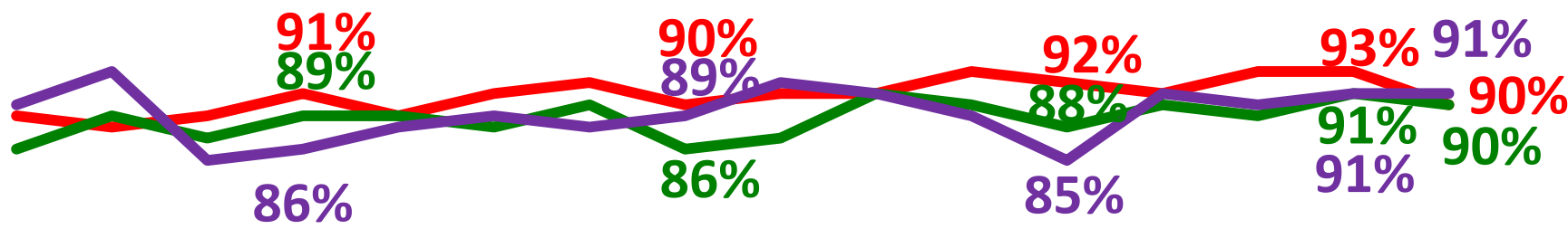
2/14/2017 ↑ ↓ = higher or lower than previous wave or year at C.I. = .95



Personal safety during the trip



% of Respondents Rating 7-10

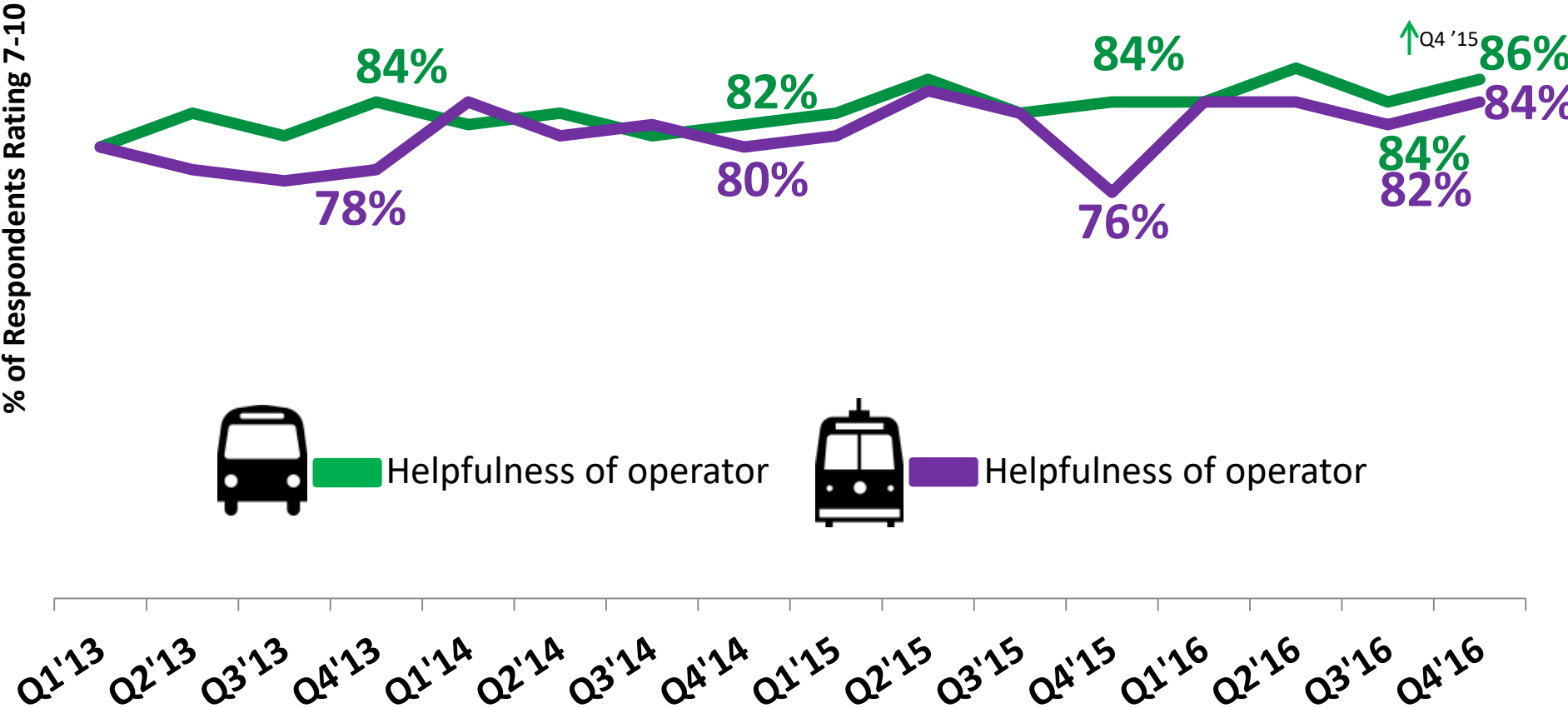


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Operators – surface routes



Helpfulness of operator



Helpfulness of operator



Maps & information inside the vehicle

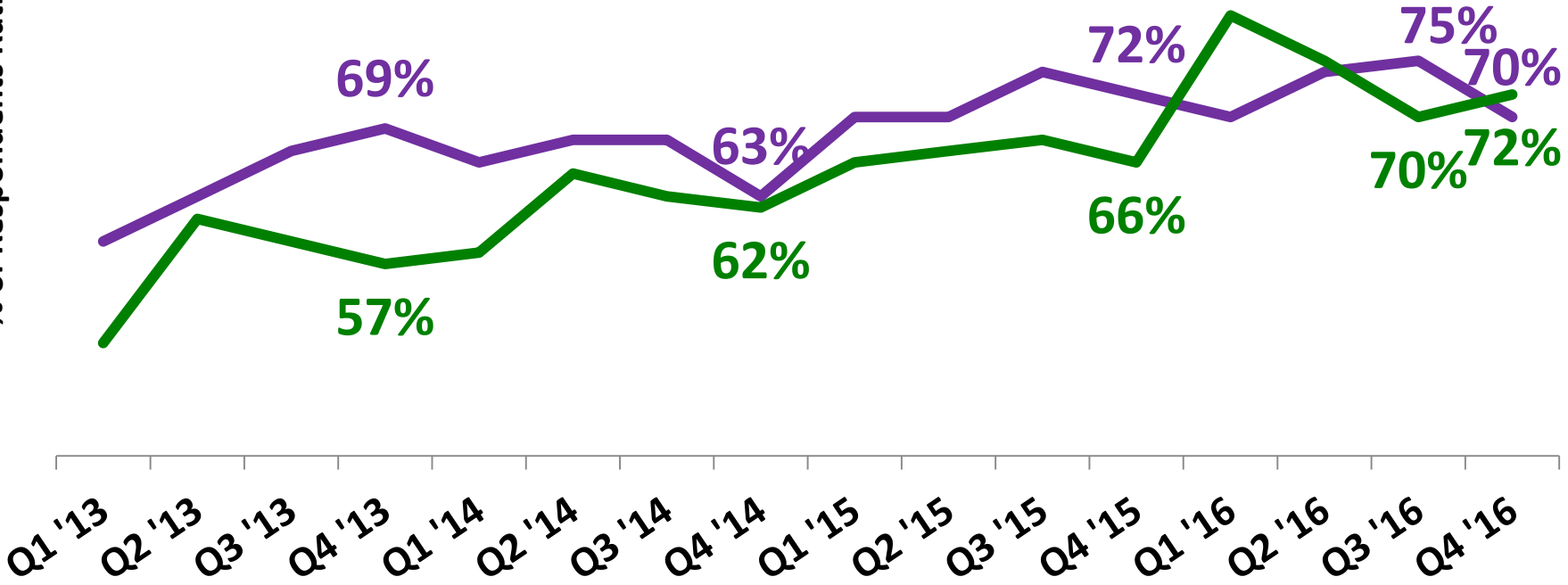


Bus

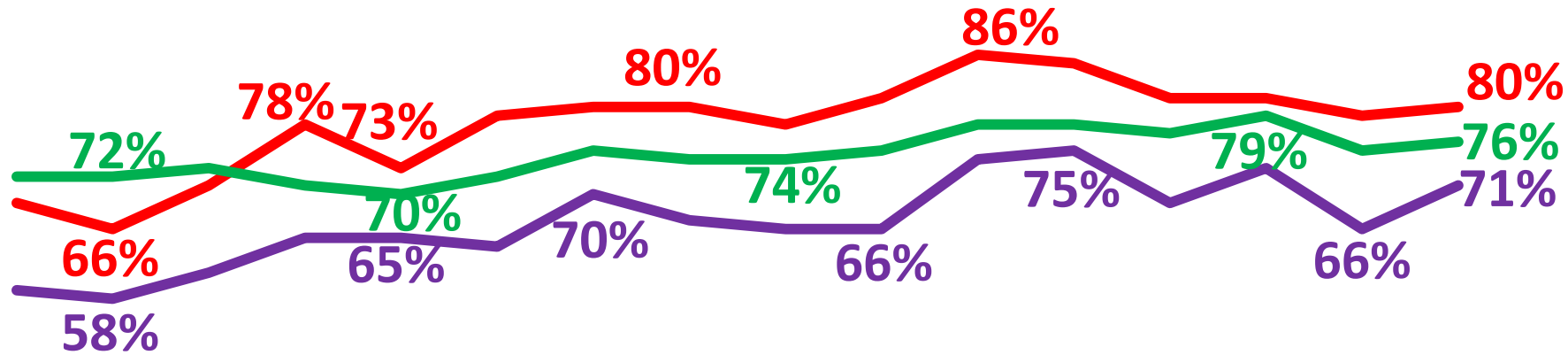





Streetcar

% of Respondents Rating 7-10



Subway station attributes



-  Cleanliness of station
-  Station staff available to help
-  Helpfulness and appearance of staff

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 Q3 '16 Q4 '16

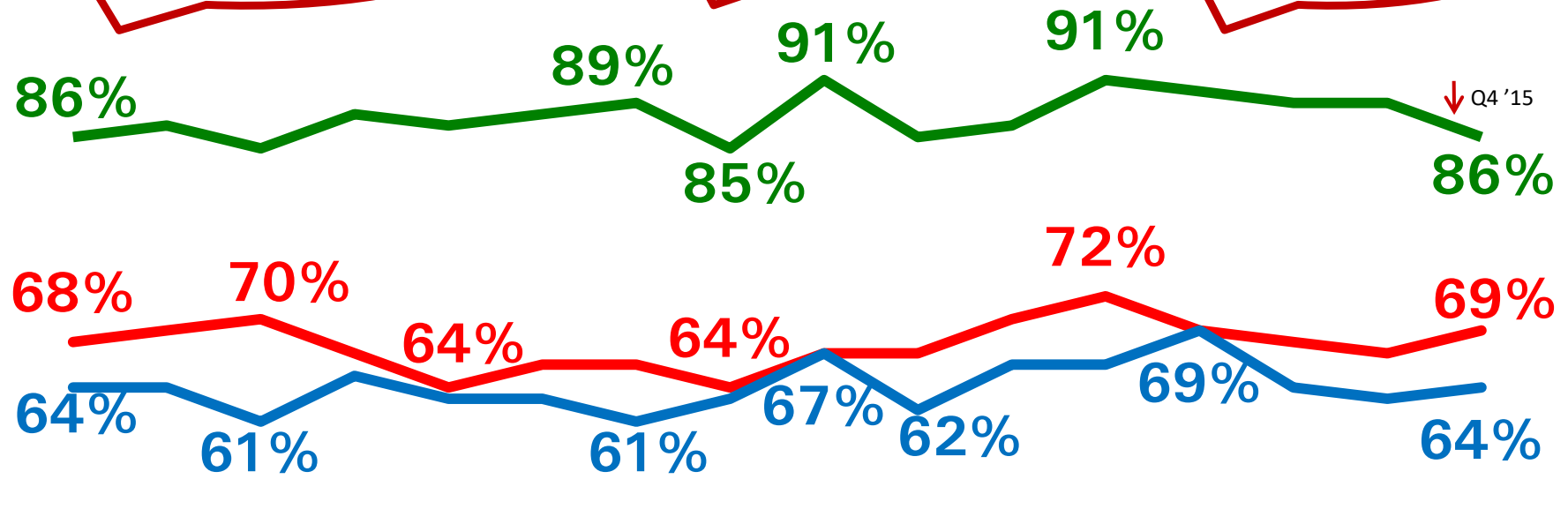


Gap between stop announcements & others

There was a message from the intercom and we could not hear it

Announcements are very outdated

Announcements on old trains on Line 2 don't work



— Helpfulness — Quality (stops) — Ease of hearing (station)

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 Q3'16 Q4'16

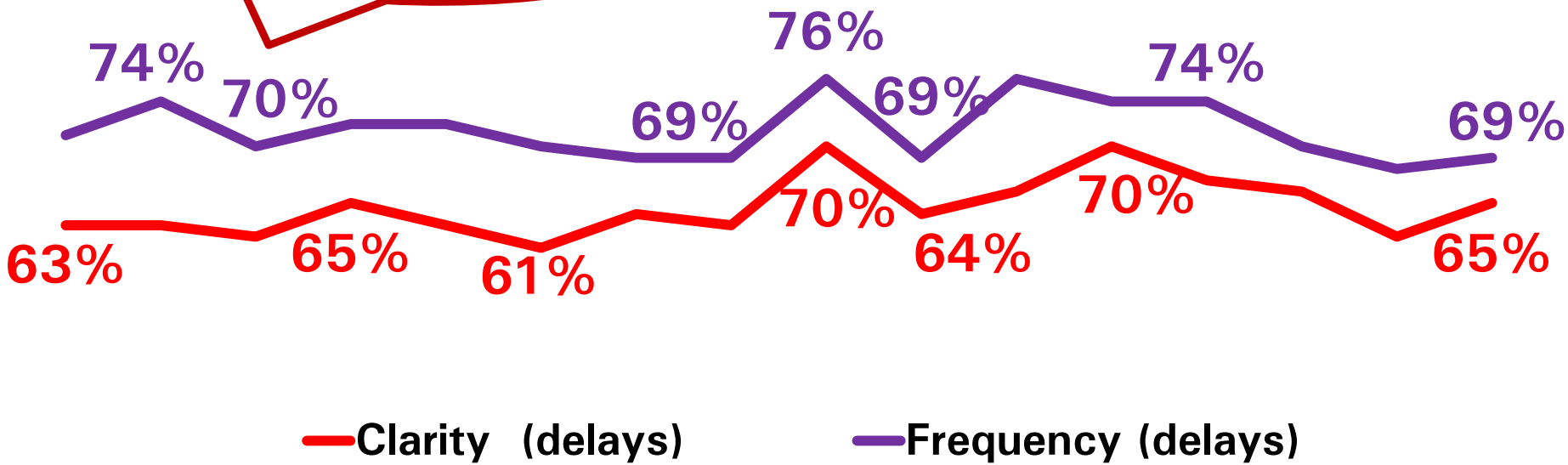


Announcements during delays



There was a delay this morning and I had to wait at least 5 minutes for a train to arrive then for 3 more trains before I could board. There were no announcements

There are no announcements about delays and people don't know what to do





Summary





1

Improving key drivers:

Continue to focus on improvements to trip duration, comfort of ride, wait time, and level of crowding.

2

Be proactive with information:

Advise customers of any issues that may affect their trip and provide alternatives during disruptions. Improve audibility and clarity of announcements.

3

Protect areas with high satisfaction:

Maintain scores and protect progress that has been achieved with key drivers, such as trip duration. Ensure transition to family of services model does not affect Wheel-Trans satisfaction.

