



2016 Q4 CUSTOMER SATISFACTION SURVEY

Quarterly Report

PREPARED IN PARTNERSHIP WITH:

ENVIRONICS
RESEARCH



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Method 10-minute telephone survey

Respondents 100% City of Toronto residents
Are between 13 years to 70 years of age
TTC user at least once every few weeks or more frequently
Standard industry exclusions

Timing October 2016 – December 2016

Sample Size n = 1,001

Changes A key drivers analysis was conducted using 2014 to 2016 data from the customer satisfaction survey. Attributes used to rate satisfaction by customers were used to see how impactful those attributes are on Overall Customer Satisfaction and Pride in the TTC and what it means for Toronto.



EXECUTIVE SUMMARY



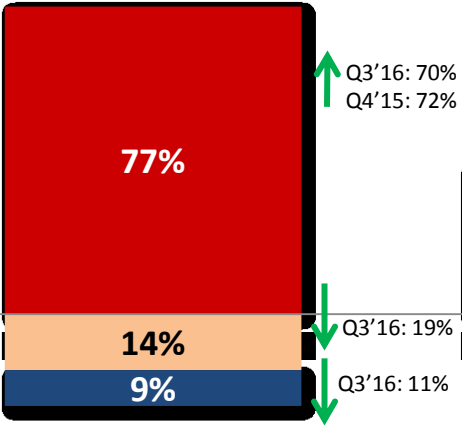
- Overall customer satisfaction has increased this wave, seeing a return to post Q3'2016 values – with 77% of customers being satisfied with their most recent trip on the TTC. Closing out 2016 with an overall satisfaction of 77% in line with 2015 (77%).
 - Frequent riders are reporting higher levels of satisfaction compared to last wave and are decreasing the gap between satisfaction levels between frequent and occasional riders
- Our return to higher levels of satisfaction is driven by a return to normal satisfaction with comfort of your ride. In Q3'2016, a less comfortable ride had a negative effect on perceptions of trip duration and wait time, ultimately leading to lower overall satisfaction scores.
 - Substantial increase in overall satisfaction levels for subways customers from last wave to this wave
- Perceptions of both pride in the TTC and what it means for Toronto and value for money remain high:
 - Seven-in-ten customers are proud of the TTC and what it means for Toronto
 - Nine-in-ten customers perceive good to excellent value for money
- PRESTO is slowly being adopted as means for paying for last trip: with 2% of customers having used PRESTO to pay for their last trip in January 2016 increasing to 12% in December 2016.



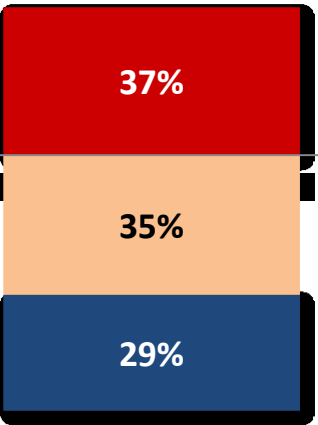
KEY PERFORMANCE METRICS SUMMARY



Overall Satisfaction

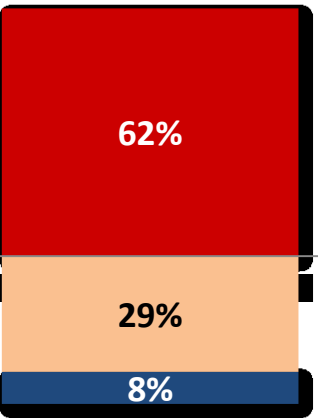


NPS

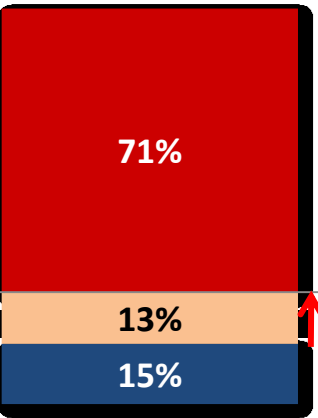


NPS score = 8

Value for Money



Pride in TTC



- | | | | |
|------------------------------|------------------|--------------------------|----------------|
| Good/Excellent (7-10) | Promoters (9-10) | Good/Excellent (4-5) | Agree (4-5) |
| Middling/No Opinion (5,6,DK) | Passives (7-8) | Average (3) | No Opinion (3) |
| Poor (1-4) | Detractors (0-6) | Below average/Poor (1-2) | Disagree (1-2) |





SUMMARY OF FINDINGS



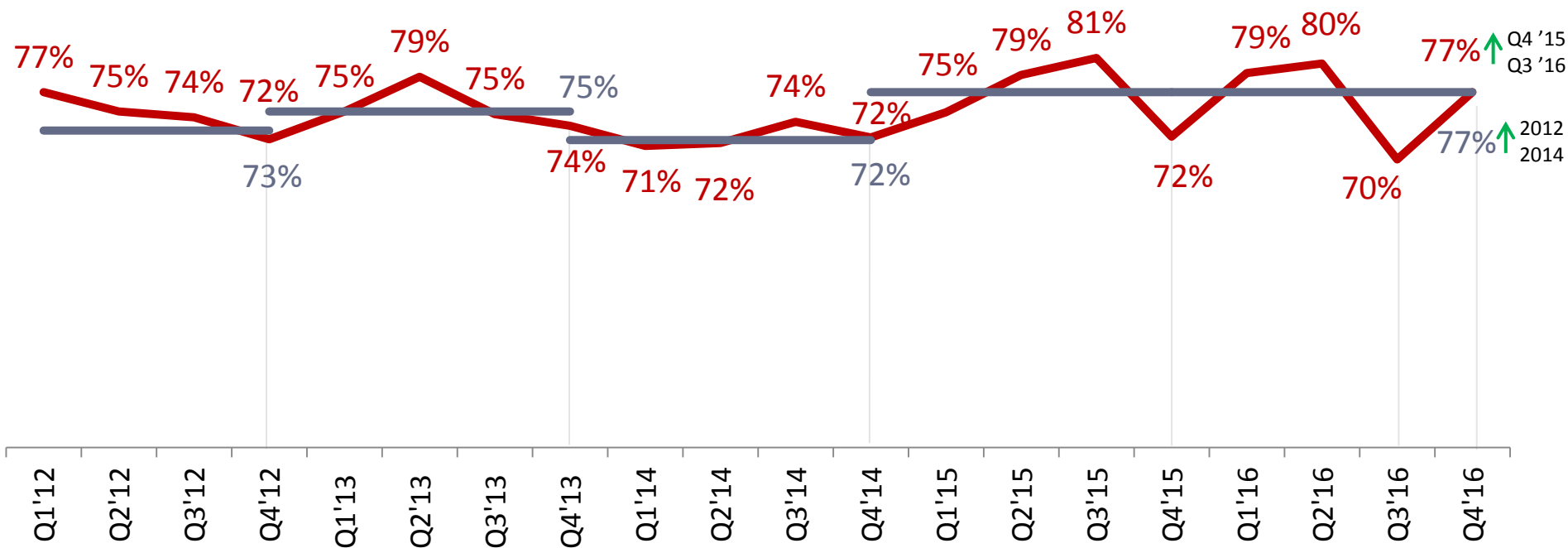
OVERALL SATISFACTION



PERCEPTIONS OF OVERALL SATISFACTION FOR 2016 AT ALL TIME HIGH, ON PAR WITH THAT OF 2015

Customer Satisfaction Over Time
(T4B; Q1 2012 – Q4 2016)

— Quarterly — Yearly

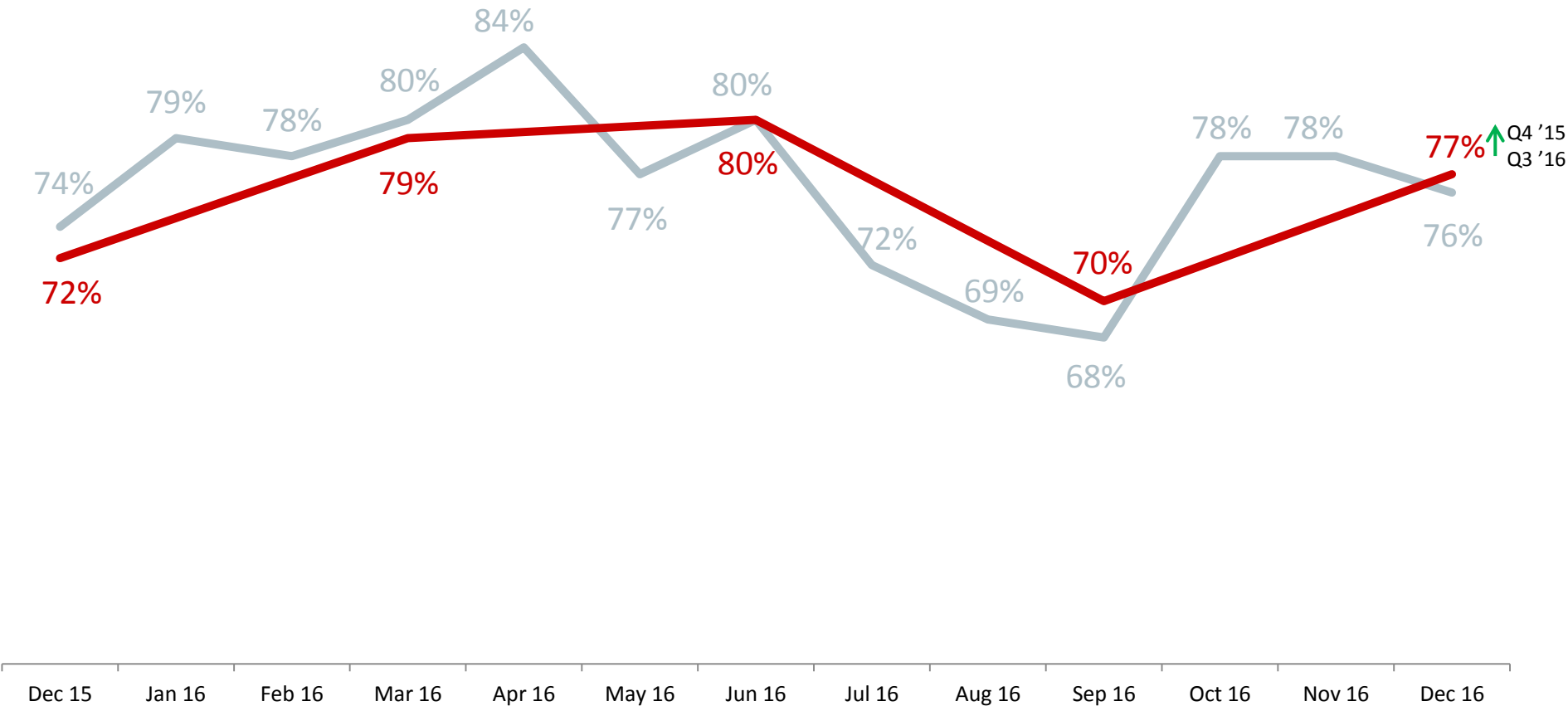


SATISFACTION RETURNING TO HIGHER SCORES AFTER DIP IN Q3'2016

Customer Satisfaction

— Monthly — Quarterly

Average Score
2015: 77%
2016: 77%



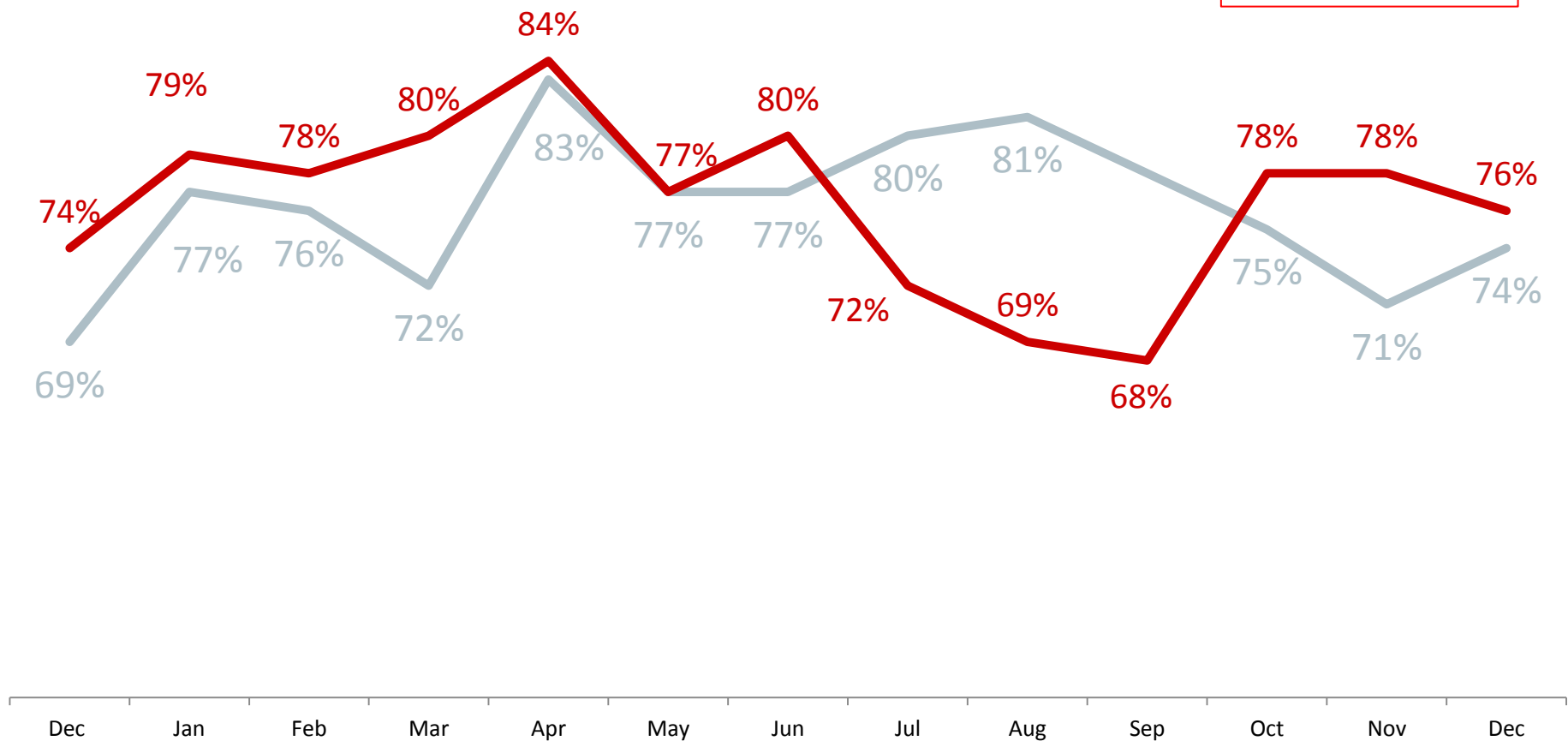
SATISFACTION LOWER Q3 2016



Customer Satisfaction

— 2015 — 2016

Average Score
2015: 77%
2016: 77%

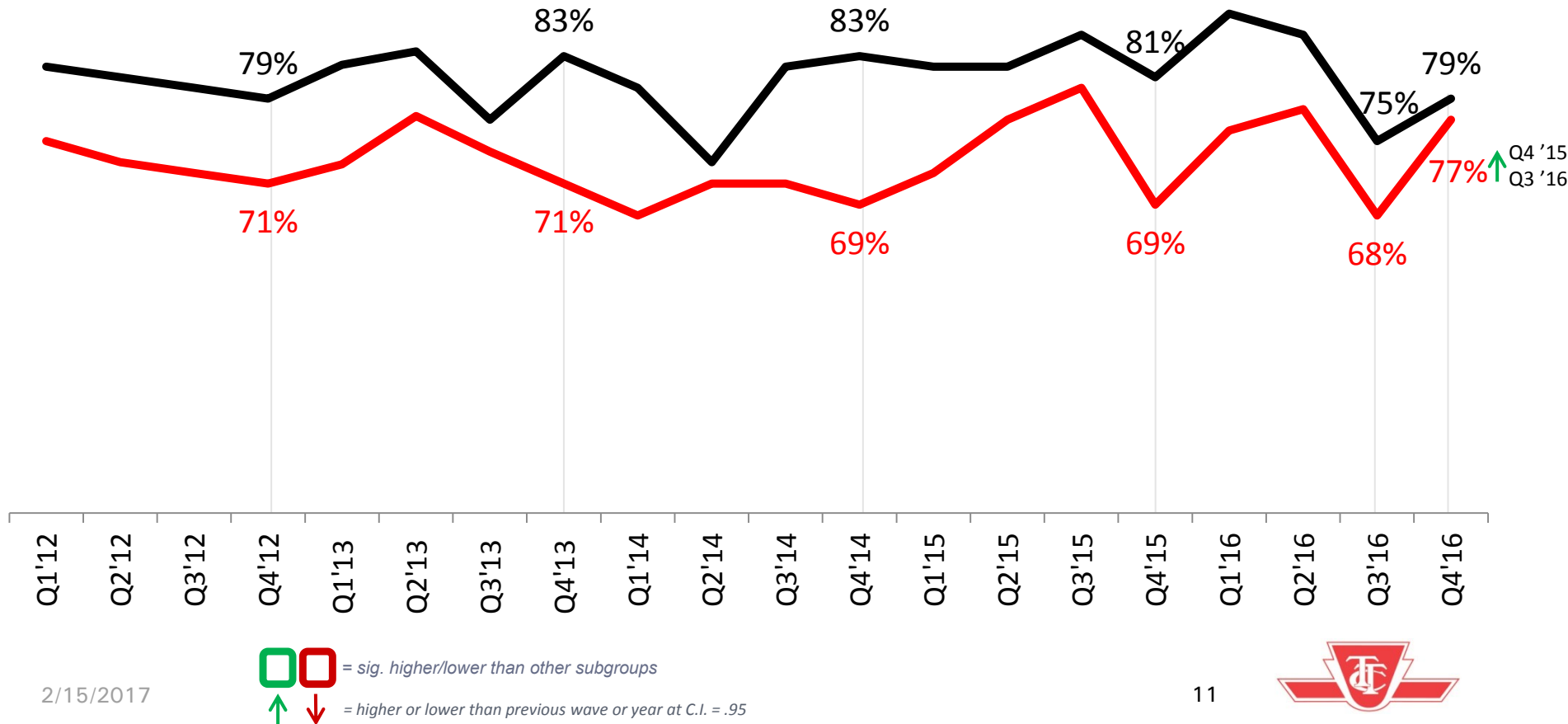


SATISFACTION GAP CLOSING BETWEEN FREQUENT & OCCASIONAL RIDERS



**Customer Satisfaction Over Time
(T4B; Q1 2012 – Q4 2016)**




— Occasional: Once a Week or Less — Frequent: Daily to Several Times a Week

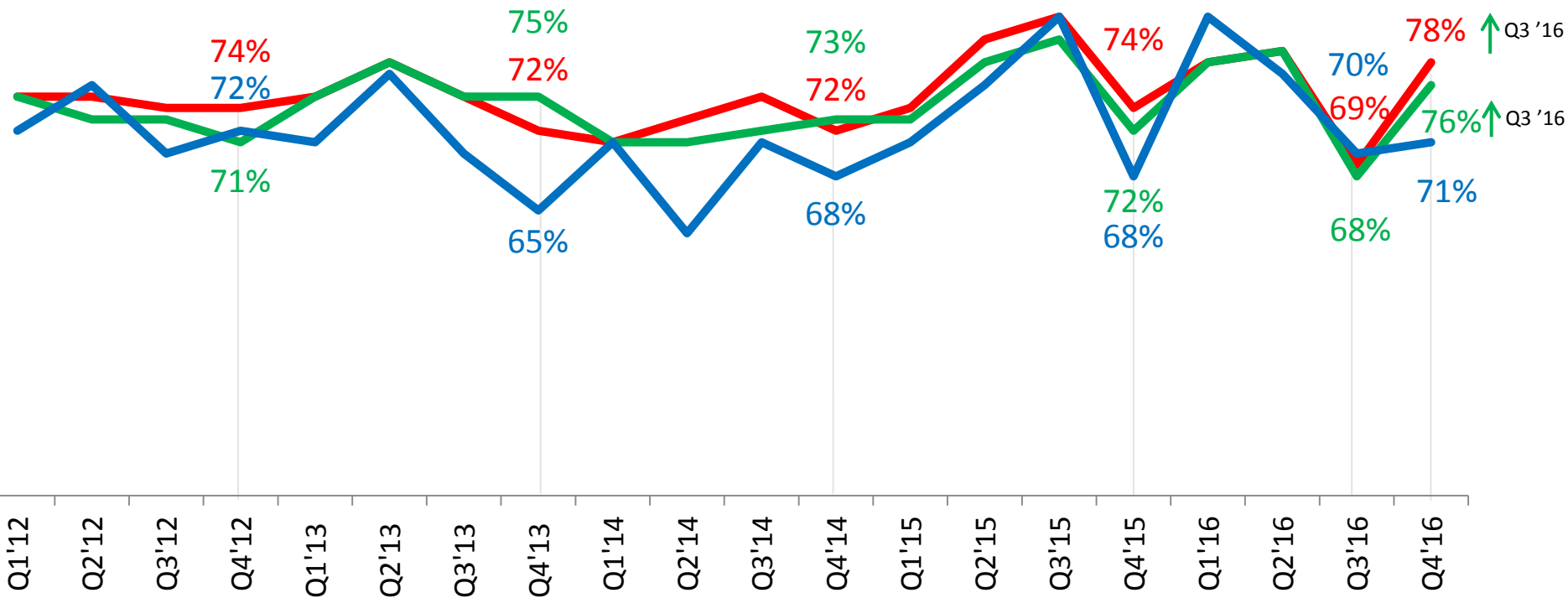


SATISFACTION INCREASED WAVE TO WAVE ON SUBWAY AND BUS



Customer Satisfaction Over Time
(T4B; Q1 2012 – Q4 2016)

Used Subway  Used Bus  Used Streetcar 

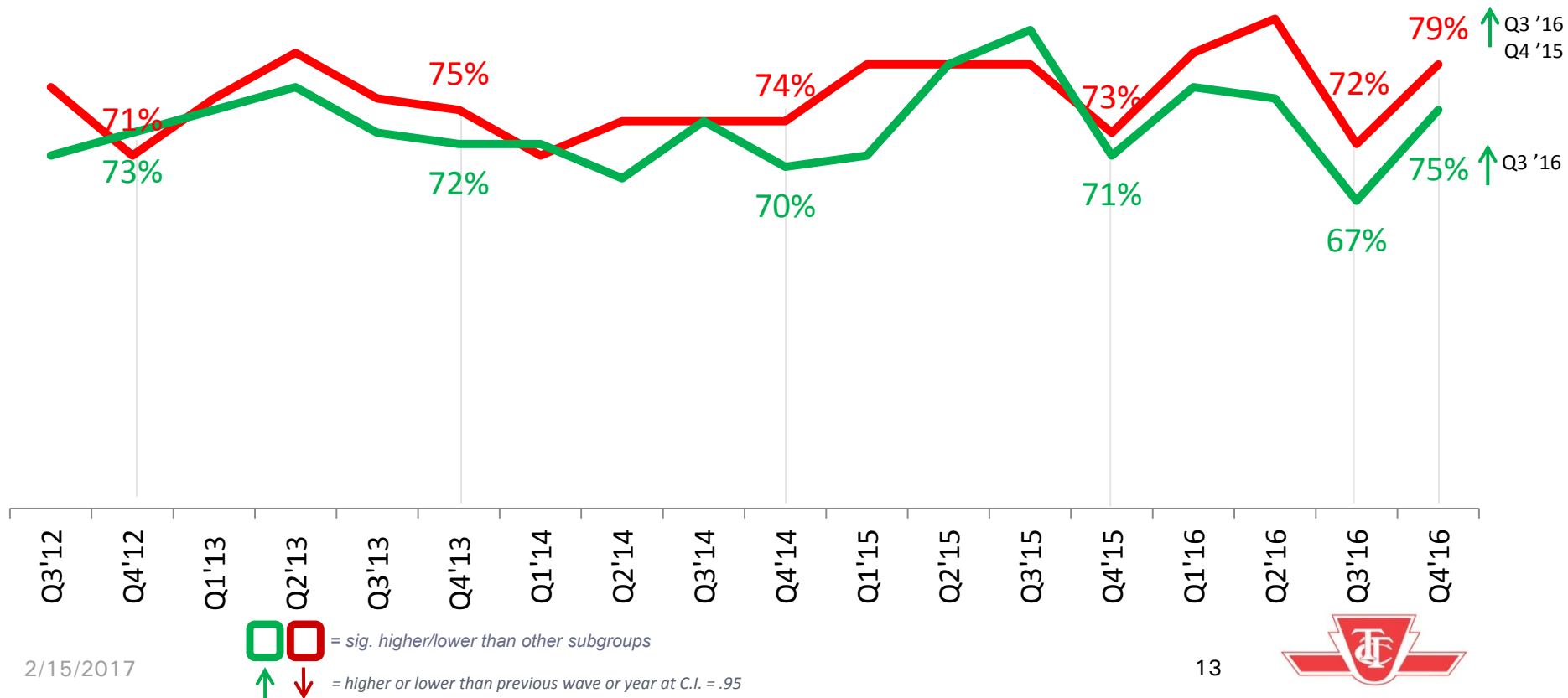


SATISFACTION INCREASED FOR BOTH SINGLE AND MULTI-MODE USERS

Customer Satisfaction Over Time
(T4B; Q3 2012 – Q4 2016)

Single Mode

Multi Mode



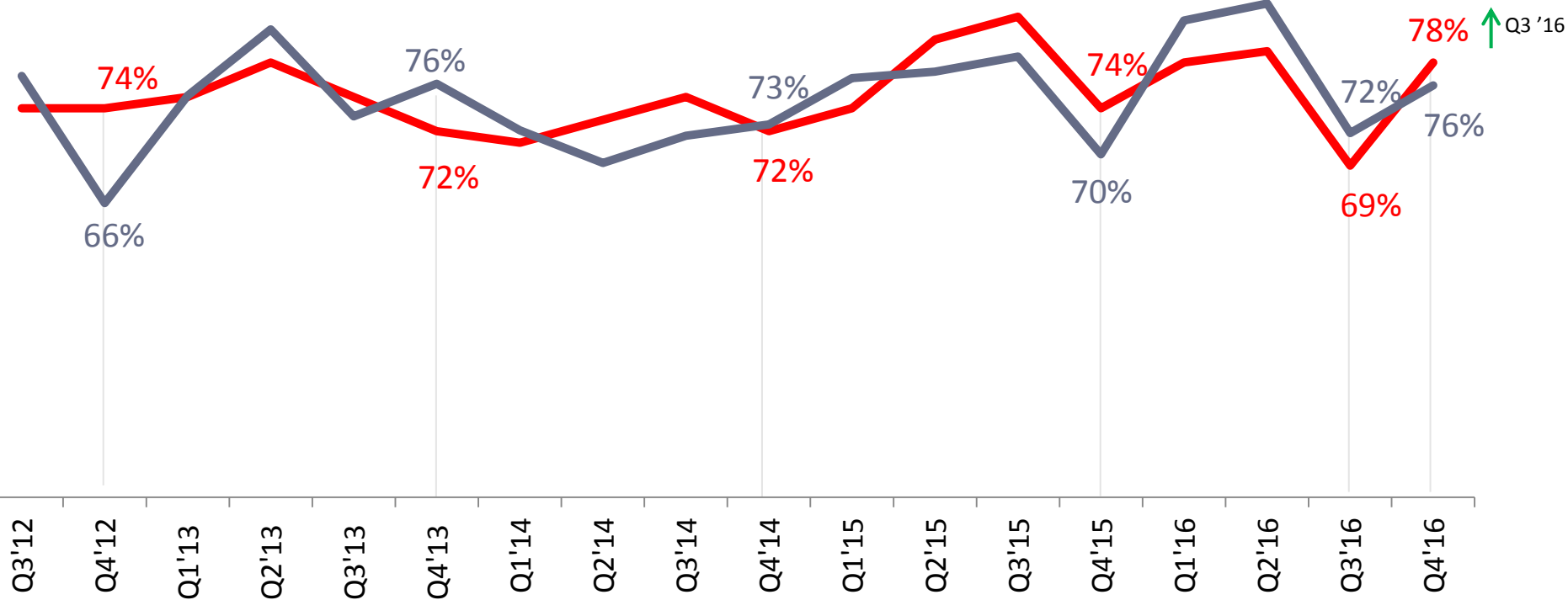
SATISFACTION OF SUBWAY CUSTOMERS INCREASED SIGNIFICANTLY THIS WAVE



Customer Satisfaction Over Time (T4B; Q3 2012 – Q2 2016)

— Used Subway 
Subway, Subway + Bus +/or Streetcar

— Did not use Subway  
Bus, Streetcar, Bus + Streetcar





VALUE FOR MONEY



TWO THIRDS OF CUSTOMERS PERCEIVE ABOVE AVERAGE VALUE FOR MONEY



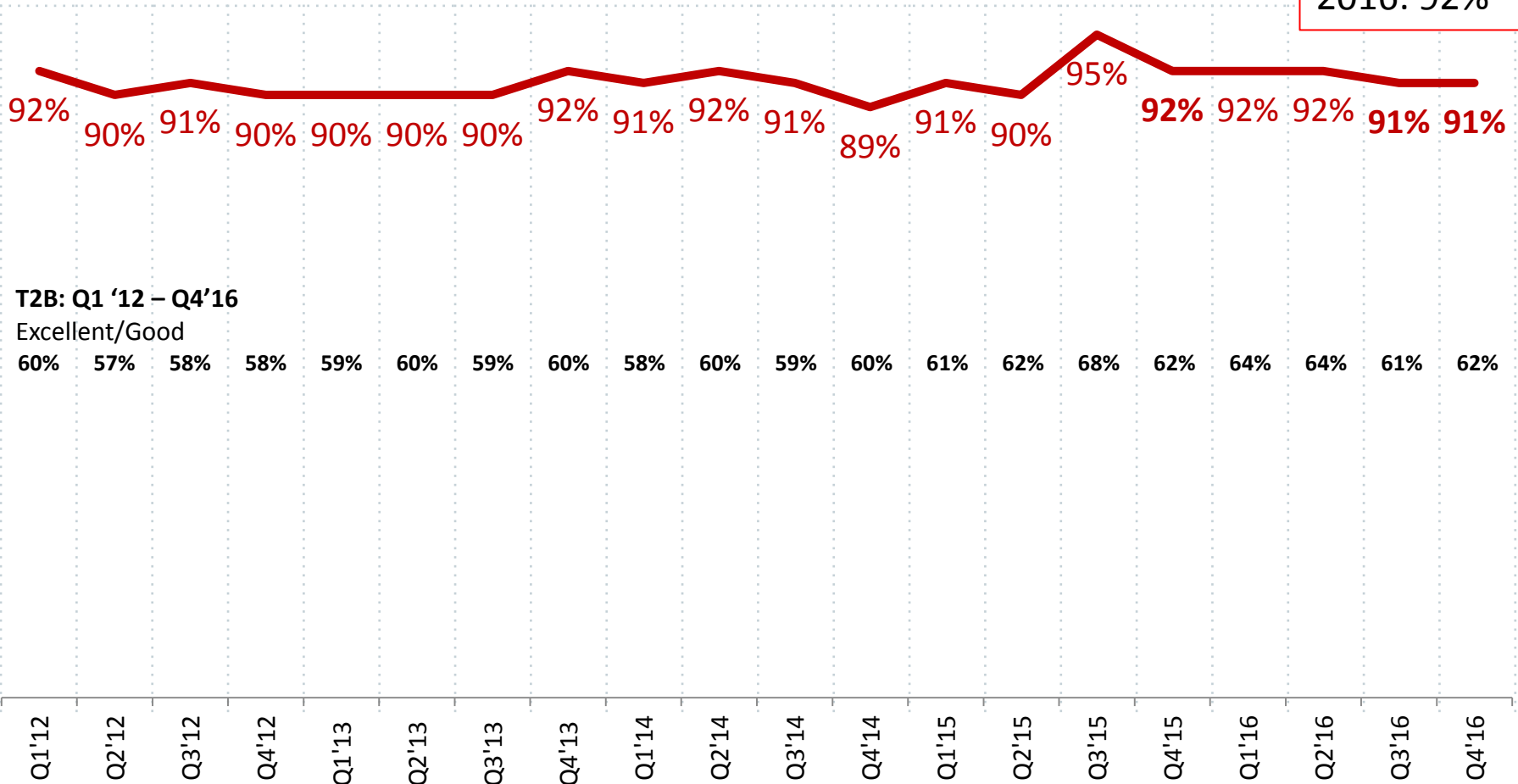
Value for Money Over Time (T3B: Q1 2012 – Q4 2016)

— Quarterly (Excellent/Good/Average)

Average Score

2015: 92%

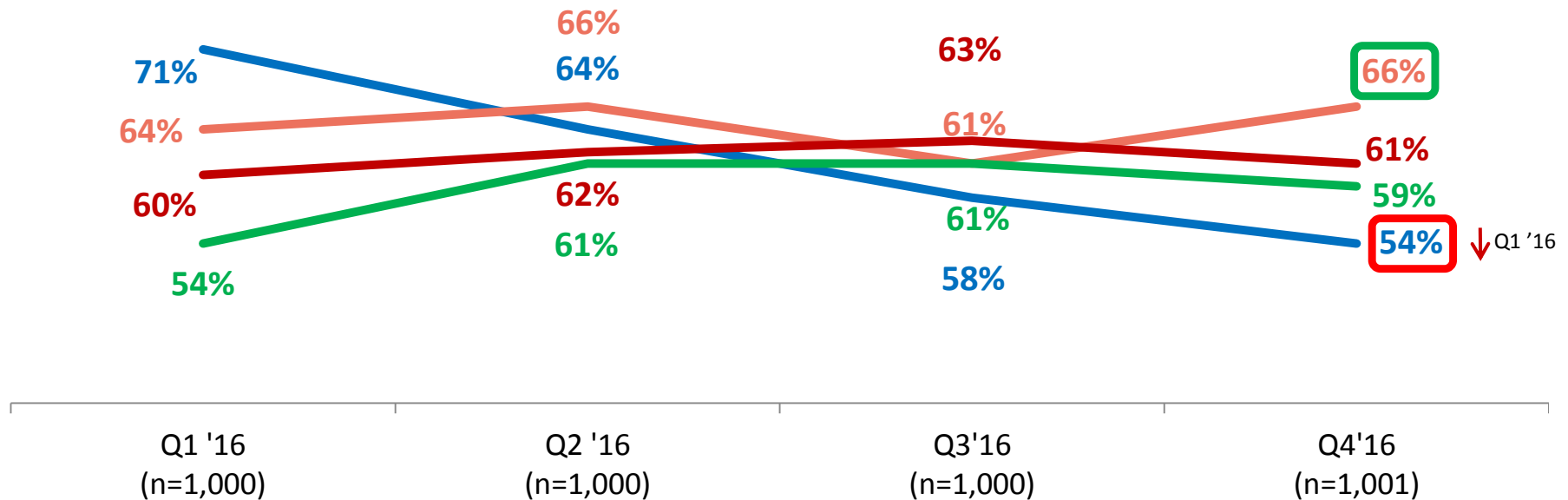
2016: 92%



CASH USERS PERCEIVE WORSE VALUE FOR MONEY IN 2016

Value for Money Over Time (T2B: Q1 2016 – Q4 2016)

— Cash — Tickets/ Tokens — Passholders — Presto



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

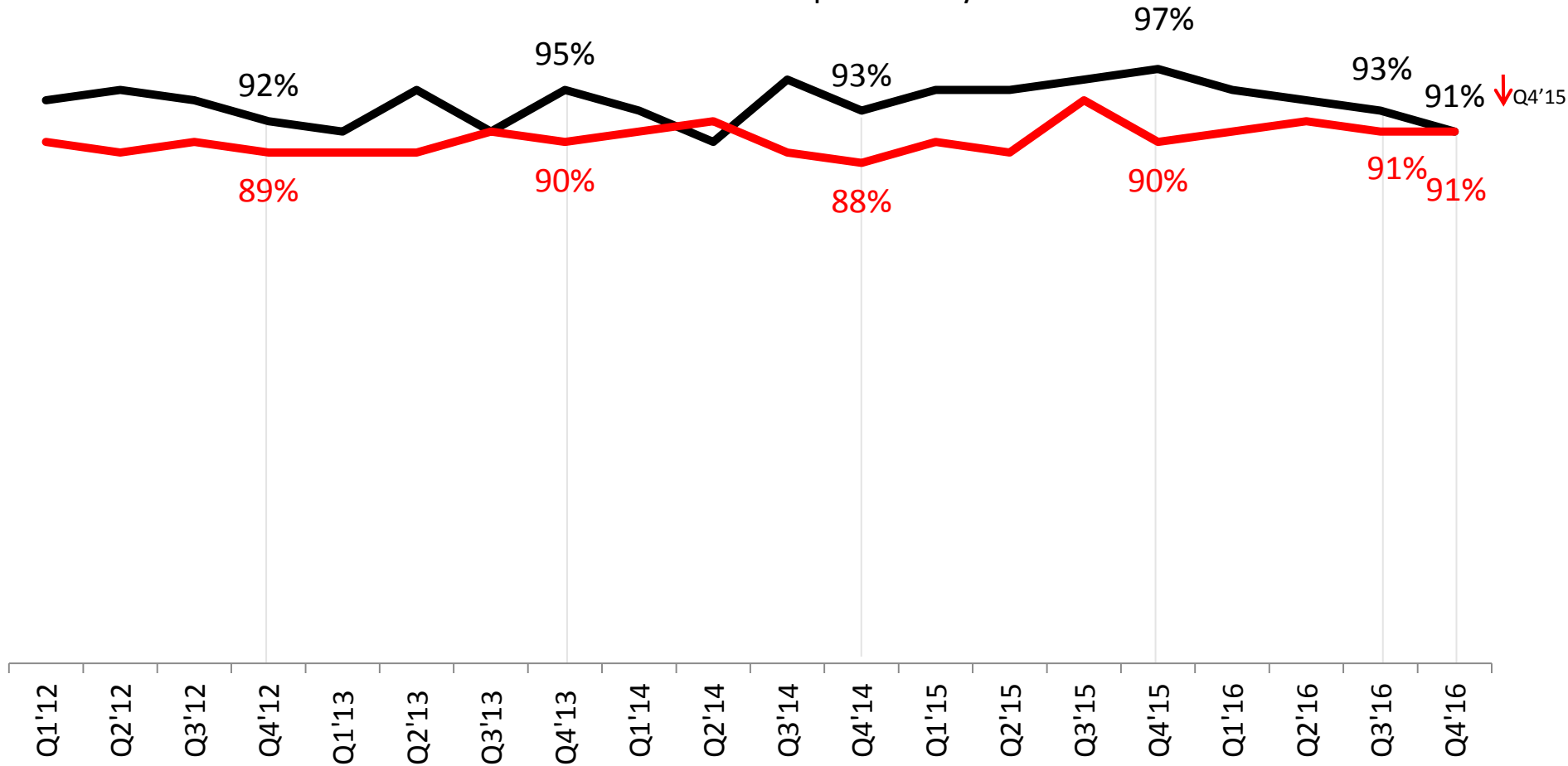
 = sig. higher/lower than other subgroups
↑ ↓ = higher or lower than previous wave or year at C.I. = .95



FREQUENT & OCCASIONAL RIDERS CONTINUE TO HOLD SIMILAR PERCEPTIONS OF VALUE FOR MONEY

**Value for Money Over Time
(T3B: Q1 2012 – Q4 2016)**

— Occasional: Once a Week or Less — Frequent: Daily to Several Times a Week



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





PRIDE IN THE TTC

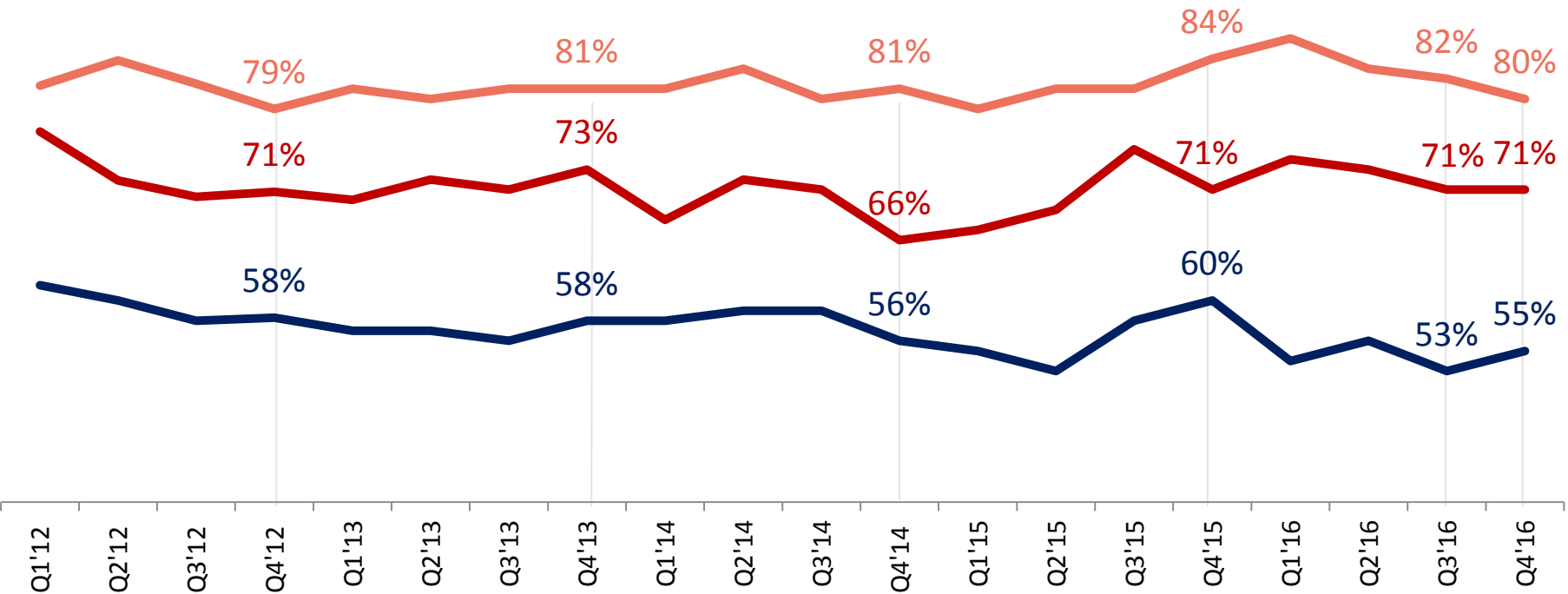


PRIDE IN THE TTC (ALL METRICS)



T2B Agreement Rating of Pride Over Waves

- I would be proud to recommend to a visitor or tourist to travel by the TTC
- I am proud of the TTC and what it means to Toronto
- I would be proud for a member of my family to work for the TTC

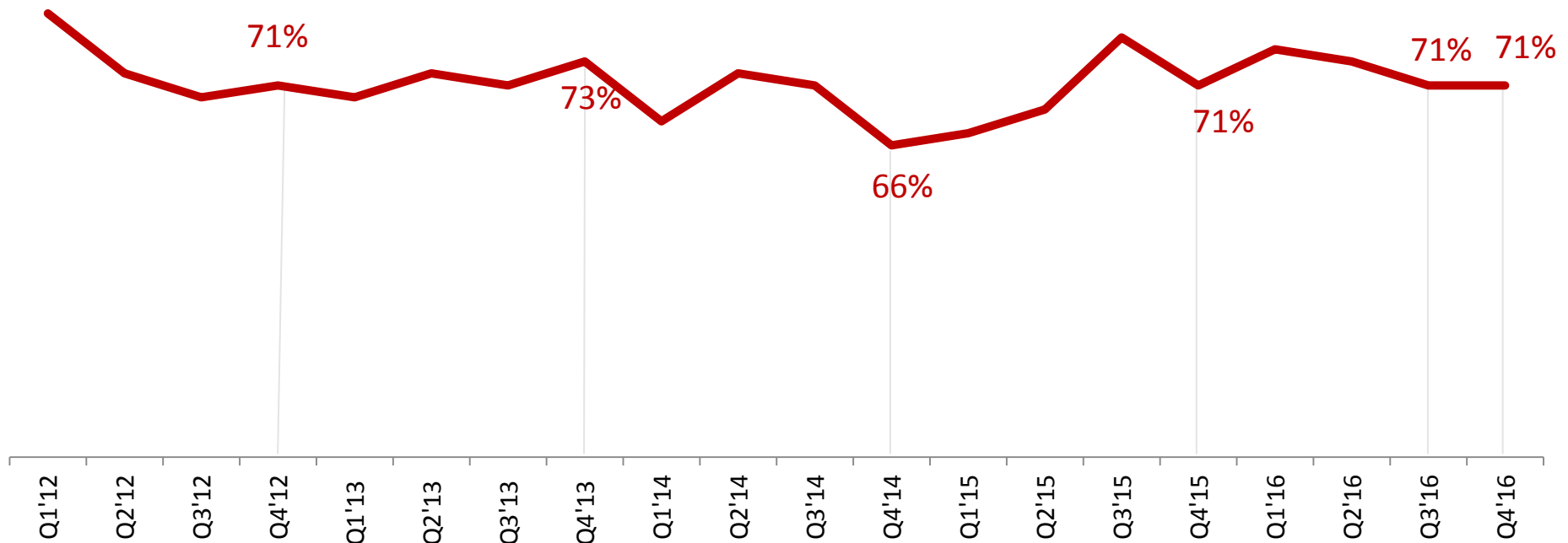


↑ ↓ =sig. higher/lower than other waves at .95



PRIDE IN THE TTC AND WHAT IT MEANS TO TORONTO REMAINS CONSISTENT

Pride in the TTC Over Time
(T2B; Q1 2012 – Q4 2016)
(Pride in the TTC and what it means to Toronto)



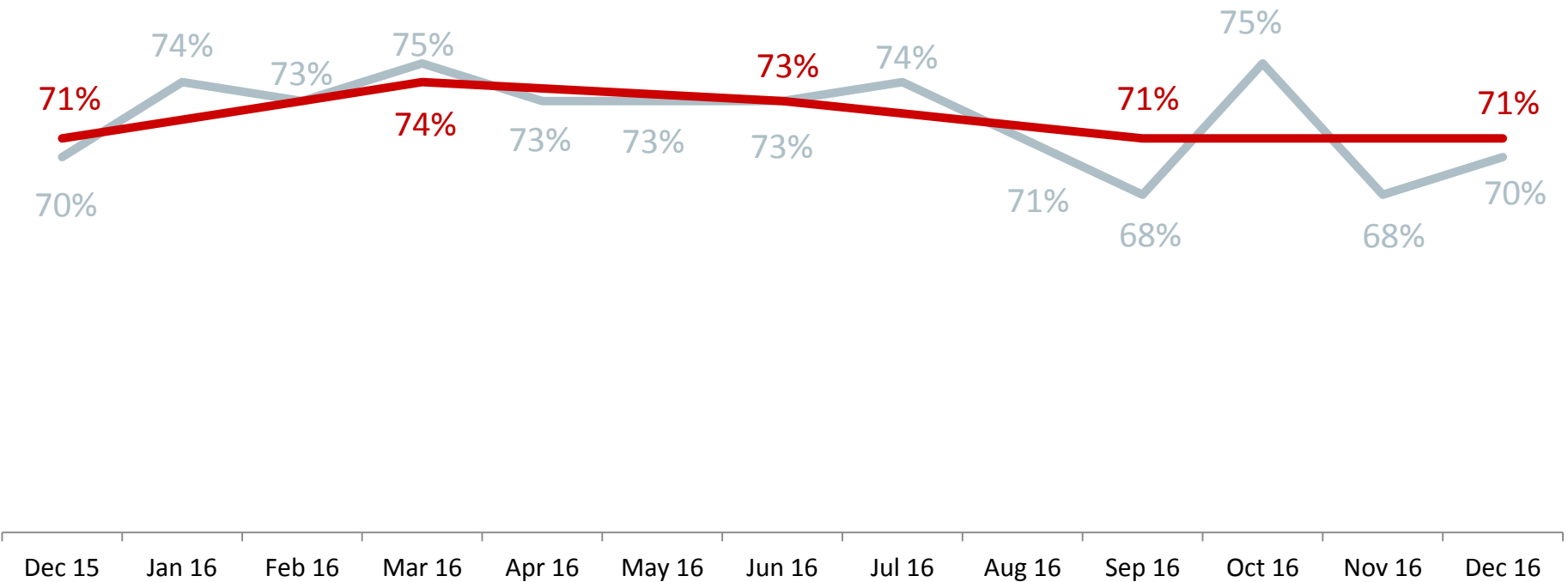
2016 PRIDE IN THE TTC



Pride in the TTC (T2B)
(Pride in the TTC and what it means to Toronto)

Average Score
2015: 71%
2016: 72%

— Monthly — Quarterly

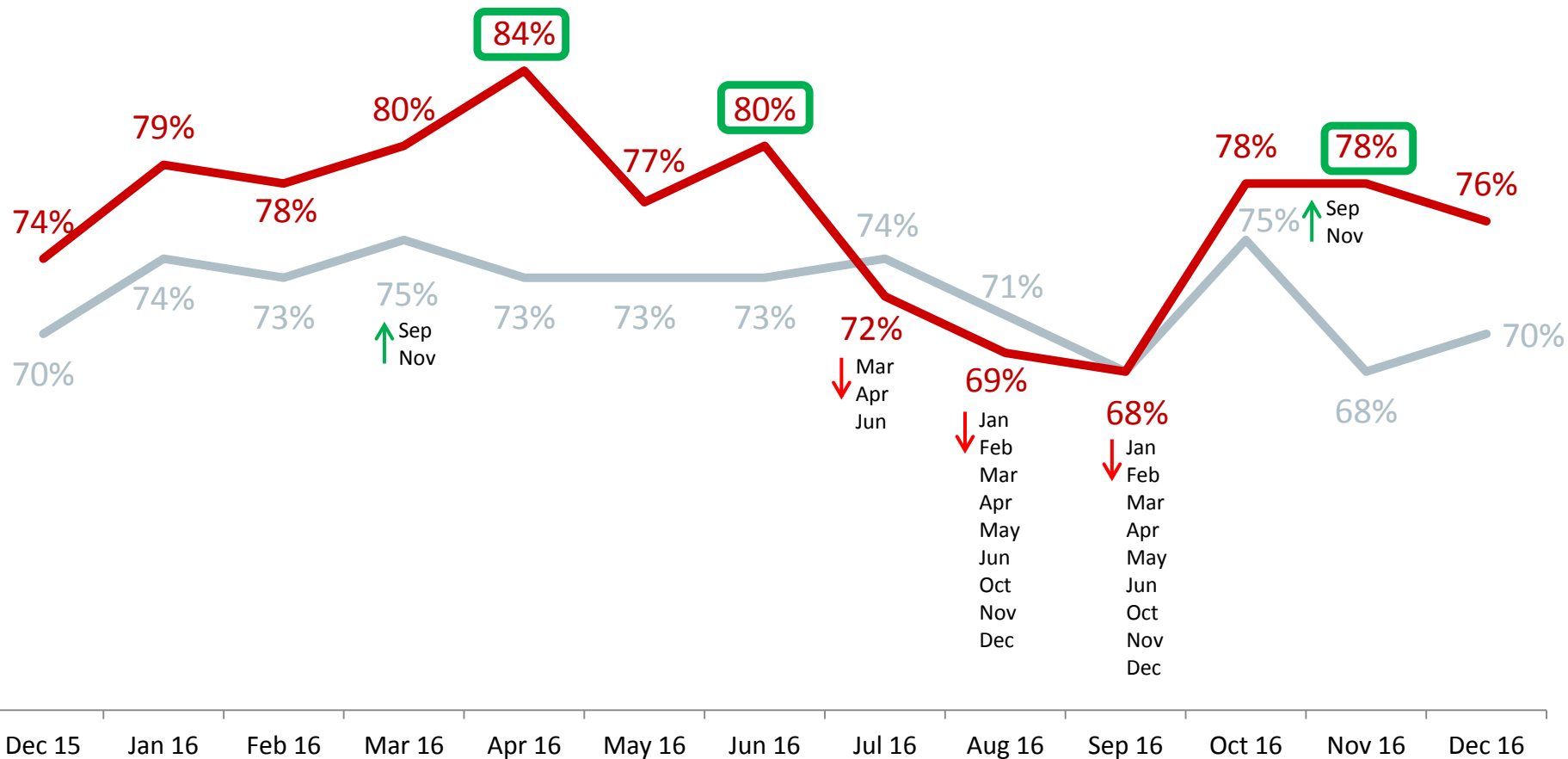


PRIDE AND SATISFACTION EXPERIENCE DECREASE IN SUMMER MONTHS

Pride in the TTC (T2B)

(Pride in the TTC and what it means to Toronto)




— Pride in the TTC — Overall Satisfaction T4B

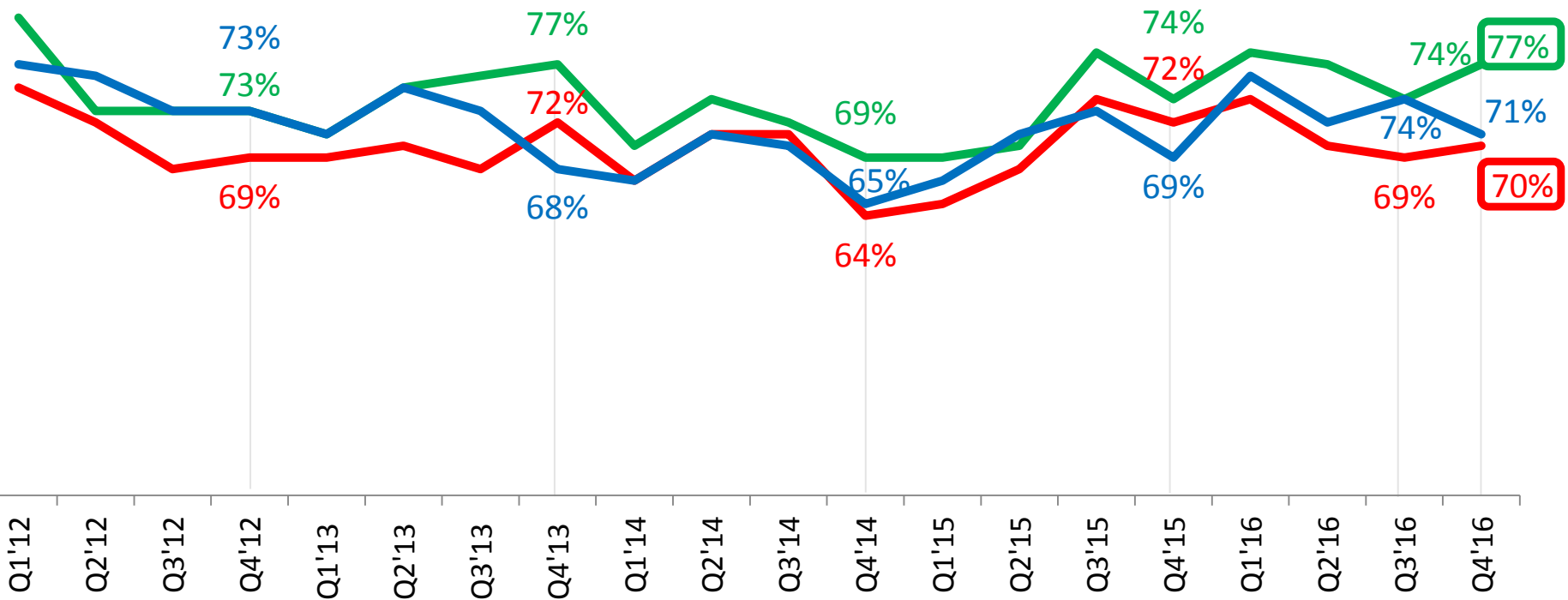






PRIDE AMONG BUS USERS IS HIGHER THAN PRIDE OF SUBWAY USERS

Pride in the TTC By Mode Over Time

(Pride in the TTC and what it means to Toronto)

Used Subway  Used Bus  Used Streetcar 



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



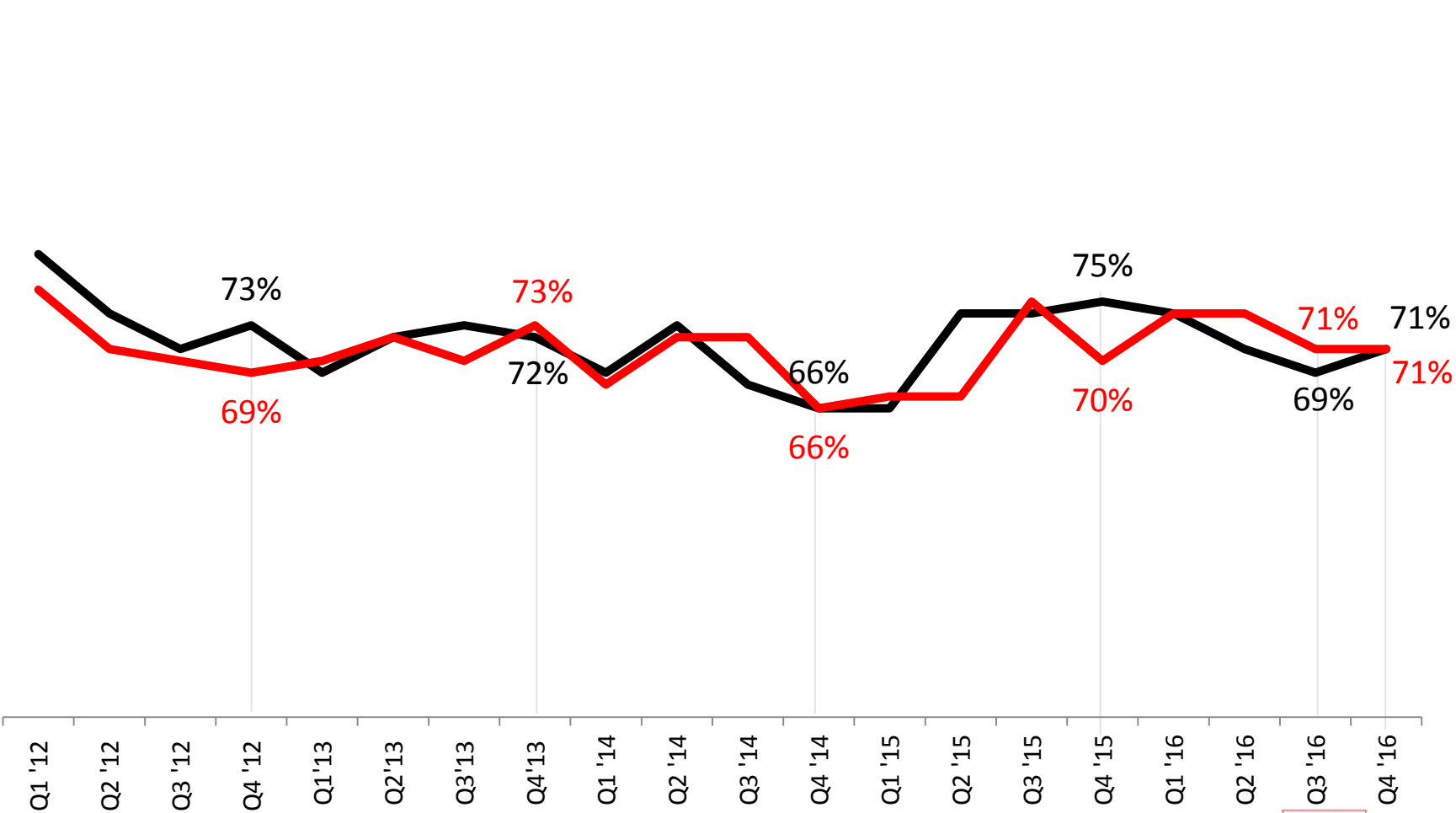
PRIDE DOES NOT VARY BY FREQUENCY OF USE



Pride in the TTC By Rider Frequency Over Time

(Pride in the TTC and what it means to Toronto)

— Occasional: Once a Week or Less — Frequent: Daily to Several Times a Week



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



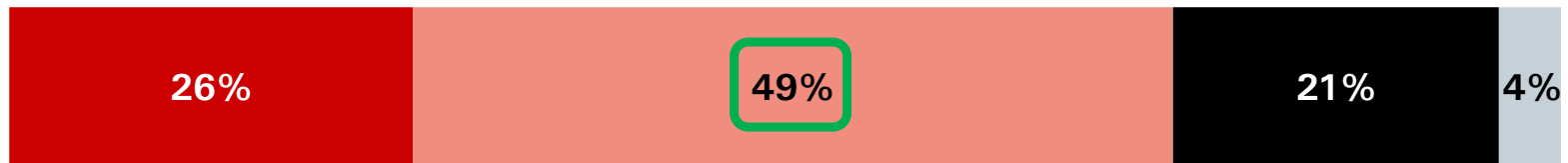
ONE QUARTER BELIEVE TTC SERVICES HAVE IMPROVED OVER THE LAST TWO YEARS



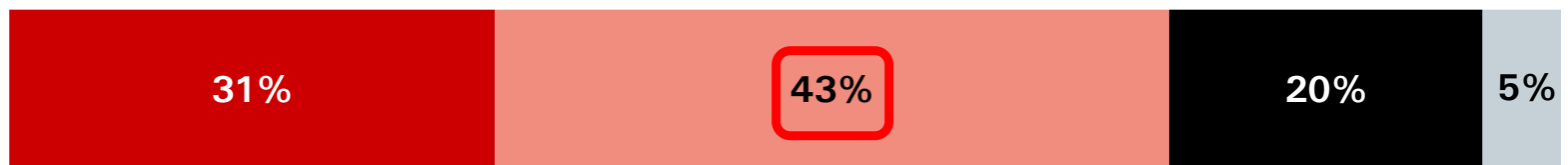
On average, **28%** say the TTC has **gotten better** over the last two years.



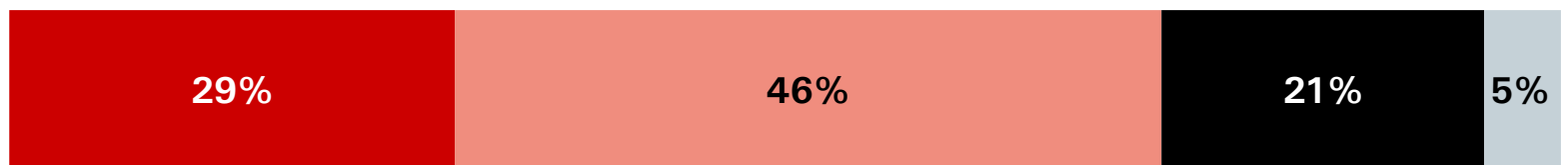
(n=725)



(n=547)



(n=213)



■ Gotten better

■ Stayed the same

■ Gotten worse

■ I'm not sure

  = sig. higher/lower than other subgroups

Q10d. Thinking about your most recent experience on the TTC, would you say that TTC services have gotten better, gotten worse or stayed the same over the past two years?





KEY DRIVERS

KEY DRIVERS ANALYSIS EXPLAINED



The interpretation and application of key drivers analysis involves two steps:

1) Factor Analysis:

Factor analysis is a statistical method that looks for similar patterns of responses among the aspects that are directly asked to respondents, and groups these aspects into “themes”, i.e. a smaller group of factors that were not asked directly in the questionnaire. We say that these factors are “latent” because they were not measured directly. These themes serve to guide our discussion and interpretation of the dimensions that matter most to customers.

2) Drivers Analysis:

A key drivers analysis is a regression-based method that determines how specific aspects of a service (often called the “predictors” or “independent variables”) contribute to customers’ overall satisfaction with the service (often called the “outcome” or “dependent variable”). Conceptually, we make the assumption that satisfaction with the overall service is a sum of their satisfaction with each individual aspect of the service, and that some aspects contribute more than others to the overall satisfaction.

A measure called the R-squared (otherwise described as the “variance explained”) provides an indication as to how much that assumption holds. It is a number between 0 and 1, and the closer it is to 1, the greater the justification for the assumption. Each aspect is then given a percentage score, which sum up to 100%. These percentages represent the share of impact that the satisfaction for each aspect has on the overall satisfaction. An aspect with a share of impact of 20% is twice more impactful on overall satisfaction than an aspect with a share of impact of 10%.

Relevant Data:

Environics used data collected from Q4 2014 through Q3 2016 for the updated drivers analysis. This specific time period was chosen to isolate a current set of data that was also large enough to produce a robust analysis by mode of transit. This dataset was also used in the creation of the TTC Customer segmentation.





SUBWAY DRIVERS OF SATISFACTION



The Factor Analysis observed four themes within the way customers perceive the subway experience.

Comfort & Convenience

- The length of time your subway trip took
- Comfort of your ride
- The length of time you waited for the vehicle
- The level of crowding inside the vehicle
- The smoothness/lack of jolting during the subway trip
- Your personal safety during the subway trip

Staff Service

- Ease of using your fare
- Helpfulness and appearance of station staff
- Station staff available to help
- Appearance of collector booth

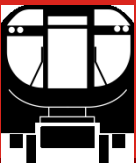
Environment

- Cleanliness of the subway station
- The cleanliness/lack of litter inside the vehicle
- Ease of getting to train platform
- The maps and information inside the vehicle
- Helpfulness of maps and signs at station

Information

- The frequency of announcements (delays)
- The clarity of announcements (delays)
- The quality of the announcements of each stop
- Helpfulness of announcements
- Ease of hearing announcements in the station

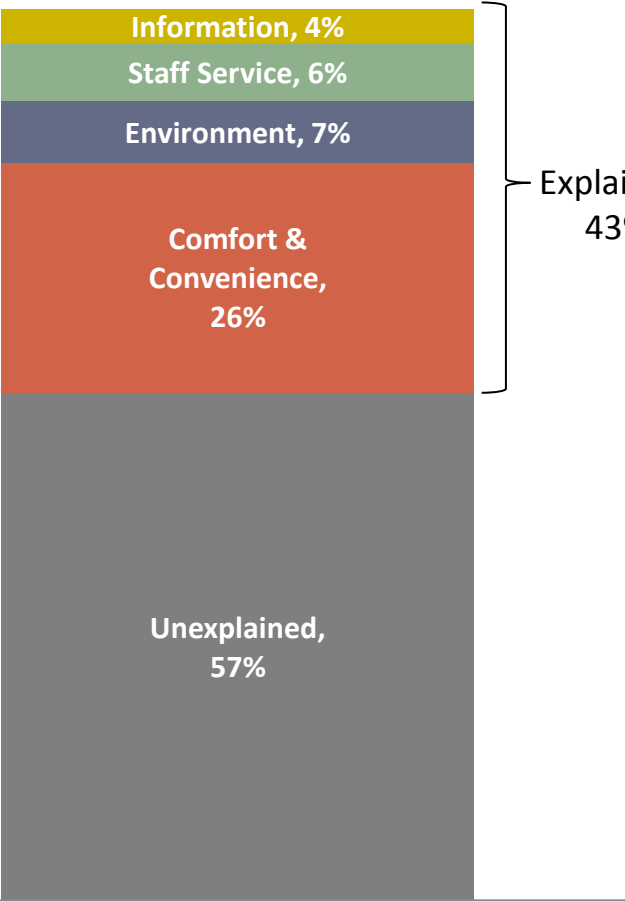




SUBWAY IMPACT OF DRIVERS OF SATISFACTION

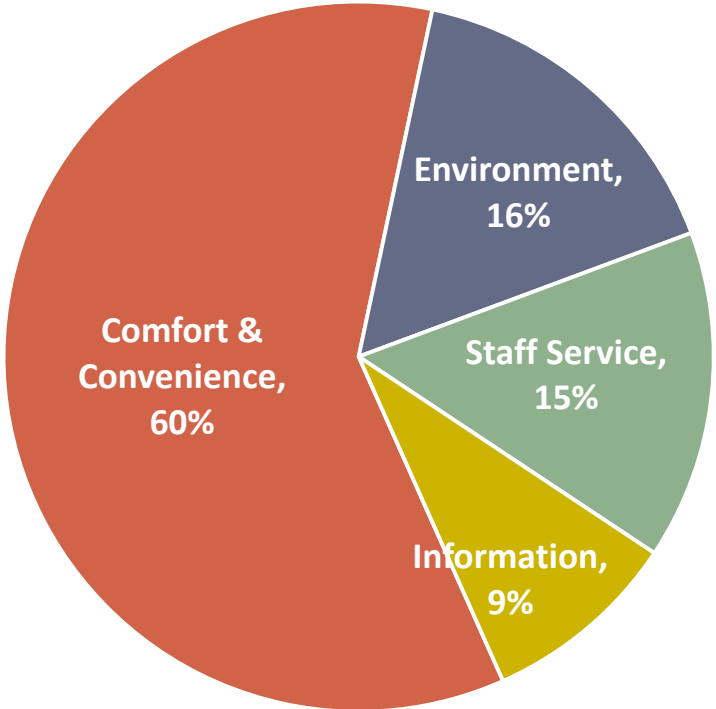


The analysis produced a model that explains 43% of the variance in overall customer satisfaction scores.



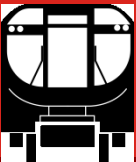
Explained,
43%

Model Variance

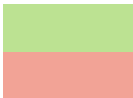


The factor “Comfort & Convenience” represents the group of dimensions which has the greatest impact on overall satisfaction.





SUBWAY METRICS



Significantly higher than last wave/year
Significantly lower than last wave/year

% SHARE OF
IMPACT

% TOP 4 BOX RATINGS OF OVERALL
SATISFACTION

Avg. T4B
Score
76%

Variance explained by model:		OS	Pride	2015	2016	2016
		43%	25%	n=693	n=716	n=725
Comfort & Convenience	The length of time your subway trip took	22%	7%	75%	77%	77%
	Comfort of your ride	11%	12%	80%	69%	79%
	The length of time you waited for the vehicle	10%	4%	83%	79%	79%
	The level of crowding inside the vehicle	9%	3%	56%	55%	55%
	The smoothness/lack of jolting during the subway trip	5%	4%	75%	75%	74%
	Your personal safety during the subway trip	4%	2%	92%	93%	90%
	TOTAL: Comfort & Convenience	60%	32%			
Environment	Cleanliness of the subway station	7%	4%	85%	79%	80%
	The cleanliness/lack of litter inside the vehicle	3%	2%	84%	81%	79%
	Ease of getting to train platform	3%	3%	86%	82%	84%
	The maps and information inside the vehicle	2%	3%	90%	88%	89%
	Helpfulness of maps and signs at station	2%	7%	82%	82%	80%
	TOTAL: Environment	16%	19%			
Staff Service	Ease of using your fare	4%	6%	85%	85%	83%
	Helpfulness and appearance of station staff	4%	7%	78%	75%	76%
	Station staff available to help	4%	8%	75%	66%	71%
	Appearance of collector booth	3%	8%	75%	74%	75%
	TOTAL: Staff Service	15%	29%			
Information	The frequency of announcements (delays)	2%	4%	74%	68%	69%
	The clarity of announcements (delays)	2%	4%	70%	62%	65%
	The quality of the announcements of each stop	2%	3%	91%	89%	86%
	Helpfulness of announcements	2%	6%	72%	67%	69%
	Ease of hearing announcements in the station	1%	3%	66%	63%	64%
	TOTAL: Information	9%	20%			





BUS DRIVERS OF SATISFACTION



The Factor Analysis observed three themes within the way customers perceive the bus experience.

Comfort & Convenience

- The length of time you waited for the vehicle
- Comfort of your ride
- The length of time your bus trip took
- The level of crowding inside the vehicle
- The smoothness/lack of jolting during the trip
- The cleanliness/lack of litter inside the vehicle

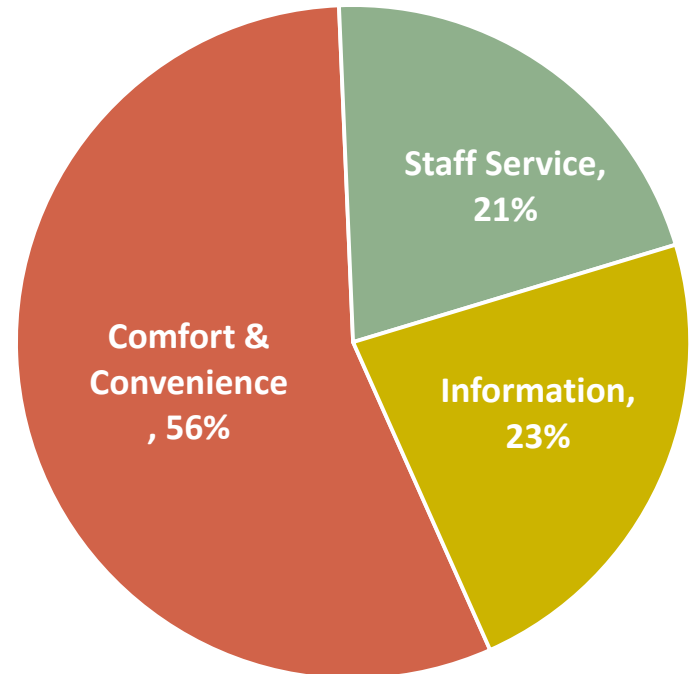
Information

- The frequency of announcements (delays)
- The clarity of announcements (delays)
- The quality of the announcements of each stop
- Ease of hearing announcements
- Helpfulness of announcements
- The maps and information inside the vehicle

Staff Service

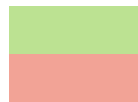
- Helpfulness of Operator
- Your personal safety during the bus trip
- Appearance of Operator
- Ease of using your fare

Model Variance





BUS METRICS



Significantly higher than last wave/year

Significantly lower than last wave/year

% SHARE OF IMPACT

Key Driver

OS Pride

% TOP 4 BOX RATINGS OF OVERALL SATISFACTION

Q4

Q3

Q4

2015

2016

2016

Variance explained by model:

40%

24%

n=581

n=552

n=547

Comfort & Convenience

The length of time you waited for the vehicle

16%

4%

61%

58%

57%

Comfort of your ride

12%

15%

74%

75%

79%

The length of time your bus trip took

12%

4%

76%

80%

78%

The level of crowding inside the vehicle

8%

3%

59%

62%

60%

The smoothness/lack of jolting during the trip

5%

5%

67%

68%

67%

The cleanliness/lack of litter inside the vehicle

4%

3%

75%

76%

74%

TOTAL: Comfort & Convenience

56%

34%

Information

The frequency of announcements (delays)

6%

14%

na

72%

72%

The clarity of announcements (delays)

5%

8%

na

77%

76%

The quality of the announcements of each stop

3%

4%

na

91%

90%

Ease of hearing announcements

3%

3%

86%

85%

84%

Helpfulness of announcements

3%

4%

84%

84%

86%

The maps and information inside the vehicle

3%

10%

72%

75%

70%

TOTAL: Information

23%

43%

Staff Service

Helpfulness of Operator

7%

6%

84%

84%

86%

Your personal safety during the bus trip

6%

4%

88%

91%

90%

Appearance of Operator

5%

4%

89%

91%

93%

Ease of using your fare

4%

10%

88%

89%

90%

TOTAL: Staff Service

21%

23%

Avg. T4B Score
78%

Q12. I'd like to ask you about the bus you used during your last TTC trip. Again, using the same 10 point 2/15/2017 scale where 1 means extremely dissatisfied and 10 means extremely satisfied, how satisfied were you with ____ [ASK FIRST ITEM]? How about ____ [ASK NEXT ITEM]?





STREETCAR DRIVERS OF SATISFACTION



The Factor Analysis observed three themes within the way customers perceive the streetcar experience.

Comfort & Convenience

- The length of time you waited for the vehicle
- Comfort of your ride
- The length of time your streetcar trip took
- The level of crowding inside the vehicle
- The smoothness/lack of jolting during the streetcar trip

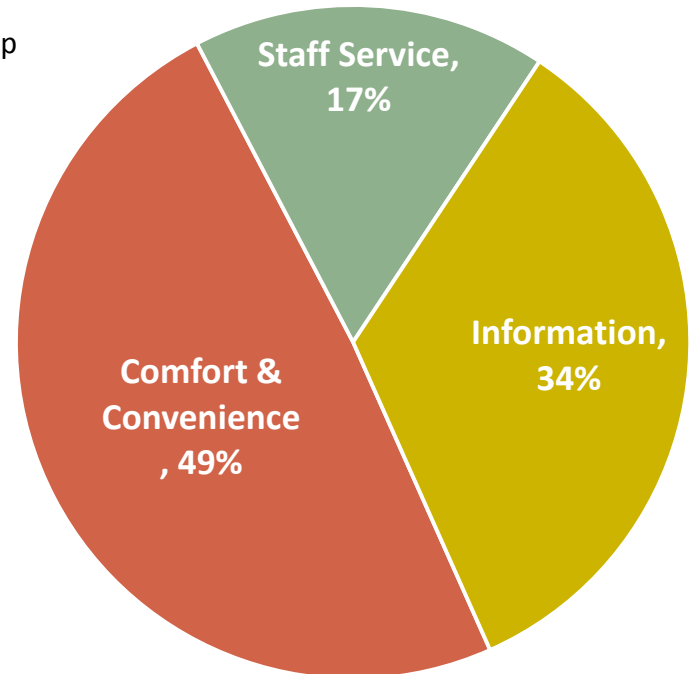
Information

- The frequency of announcements (delays)
- Ease of using your fare
- The clarity of announcements (delays)
- The quality of the announcements of each stop
- Ease of hearing announcements
- The maps and information inside the vehicle
- Helpfulness of announcements

Staff Service

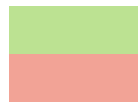
- Helpfulness of Operator
- Appearance of Operator
- Your personal safety during the streetcar trip
- The cleanliness/lack of litter inside the vehicle

Model Variance





STREETCAR METRICS



Significantly higher than last wave/year



Significantly lower than last wave/year

% SHARE OF IMPACT

Key Driver

OS

Pride

% TOP 4 BOX RATINGS OF OVERALL SATISFACTION

Q4

Q3

Q4

2015

2016

2016

Variance explained by model:

50%

25%

n=305

n=224

n=213

Comfort & Convenience

The length of time you waited for the vehicle

14%

5%

60%

72%

65%

Comfort of your ride

12%

9%

68%

69%

72%

The length of time your streetcar trip took

10%

9%

71%

81%

76%

The level of crowding inside the vehicle

8%

3%

54%

61%

63%

The smoothness/lack of jolting during the streetcar trip

4%

5%

65%

78%

76%

TOTAL: Comfort & Convenience

49%

31%

Information

The frequency of announcements (delays)

9%

8%

na

69%

72%

Ease of using your fare

6%

4%

73%

89%

82%

The clarity of announcements (delays)

6%

6%

na

68%

72%

The quality of the announcements of each stop

5%

8%

na

88%

89%

Ease of hearing announcements

3%

4%

77%

81%

82%

The maps and information inside the vehicle

2%

12%

66%

70%

72%

Helpfulness of announcements

2%

4%

81%

80%

85%

TOTAL: Information

34%

46%

Staff Service

Helpfulness of Operator

6%

11%

76%

82%

84%

Appearance of Operator

4%

5%

87%

93%

91%

Your personal safety during the streetcar trip

4%

3%

85%

91%

91%

The cleanliness/lack of litter inside the vehicle

4%

3%

64%

75%

64%

TOTAL: Staff Service

17%

22%

Avg. T4B Score
77%





INDIVIDUAL MEASURES

Importance vs. Performance Maps



WHAT DRIVES CUSTOMER SATISFACTION?

**Key Drivers
2016**

**Most
Influential
Factor**



Subway



Bus



Streetcar

Wheel-Trans

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

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

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

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

Indicates a metric with ≥80% satisfaction in Q4'16

**Less
Influential
Factor**



INDIVIDUAL METRICS QUADRANT MAPS

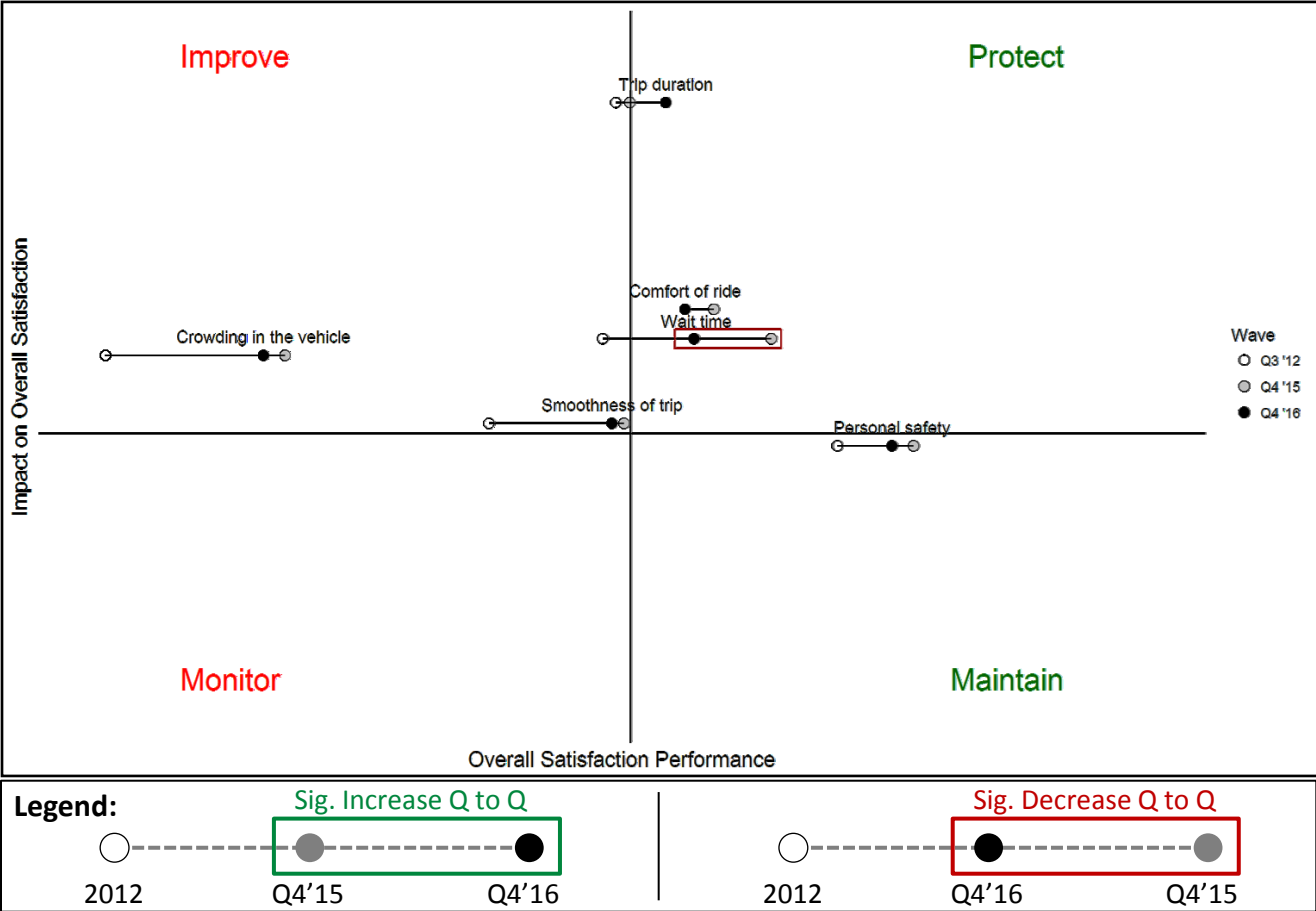


Understanding the maps:
Recently re-evaluated in 2016, the key drivers analysis identifies those individual metrics that make a higher impact on overall satisfaction, and by plotting them against satisfaction scores, we are able to identify the areas of excellence and improvement going forward.

The **top half** of the map outlines drivers with **higher than average impact on overall satisfaction**, the lower half reveals less important drivers of satisfaction.*

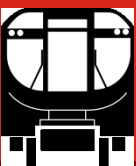
The **right half** of the map outlines **satisfaction scores that are performing well**, and should be maintained, while the left half of the map shows areas of satisfaction that can be improved.

The **priority** quadrant is the top left – the metrics that are deemed more **important drivers of satisfaction**, that are **achieving lower satisfaction aggregate scores**.



**While areas on the lower half of the map have less of an impact, it is important to note that this could be due to lower variance within the scores, and changes in service might impact correlations to satisfaction.*

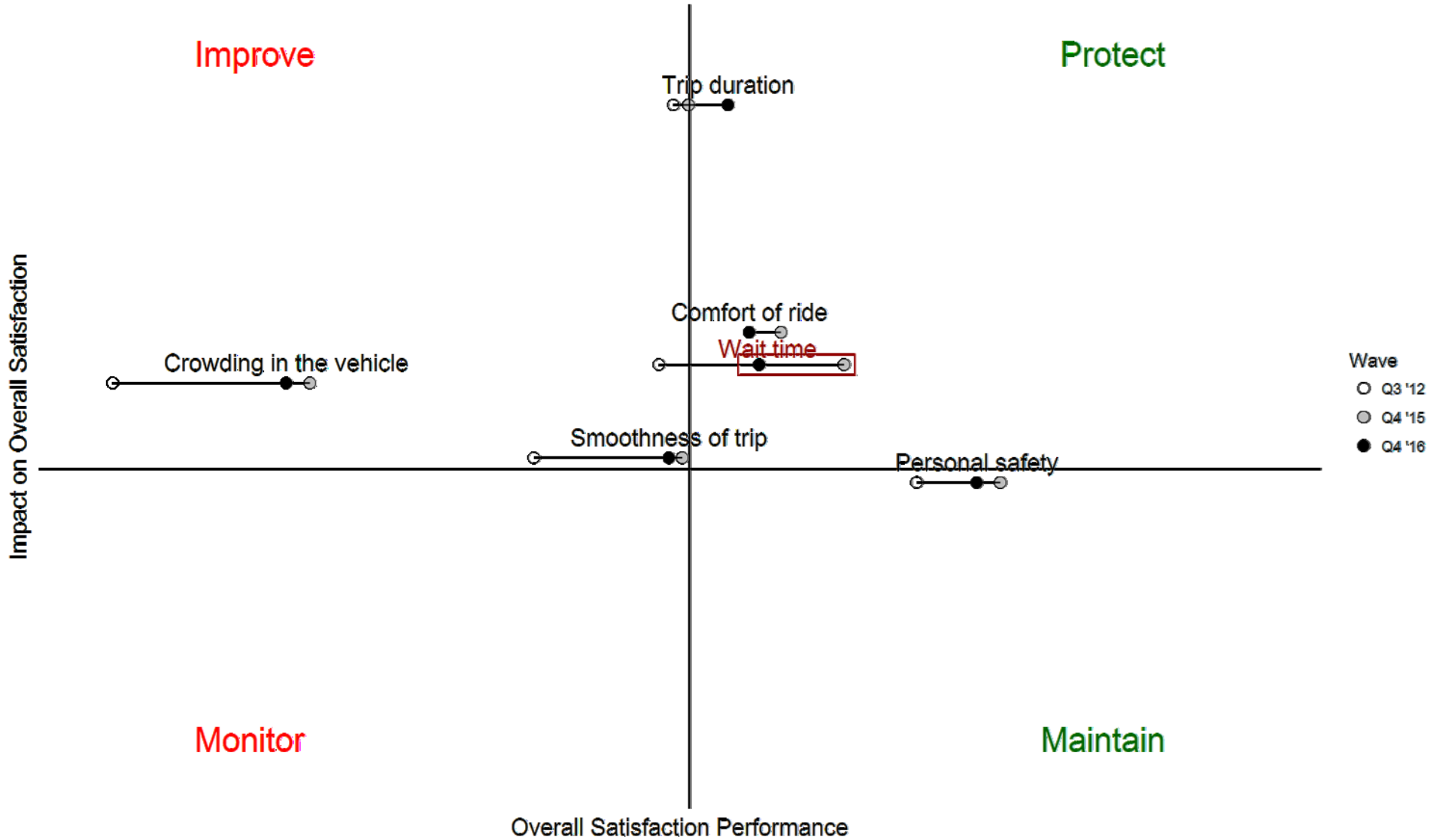


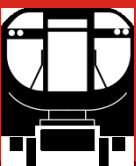


SUBWAY: COMFORT & CONVENIENCE



Overall Satisfaction – Importance vs. Performance Maps: Subway

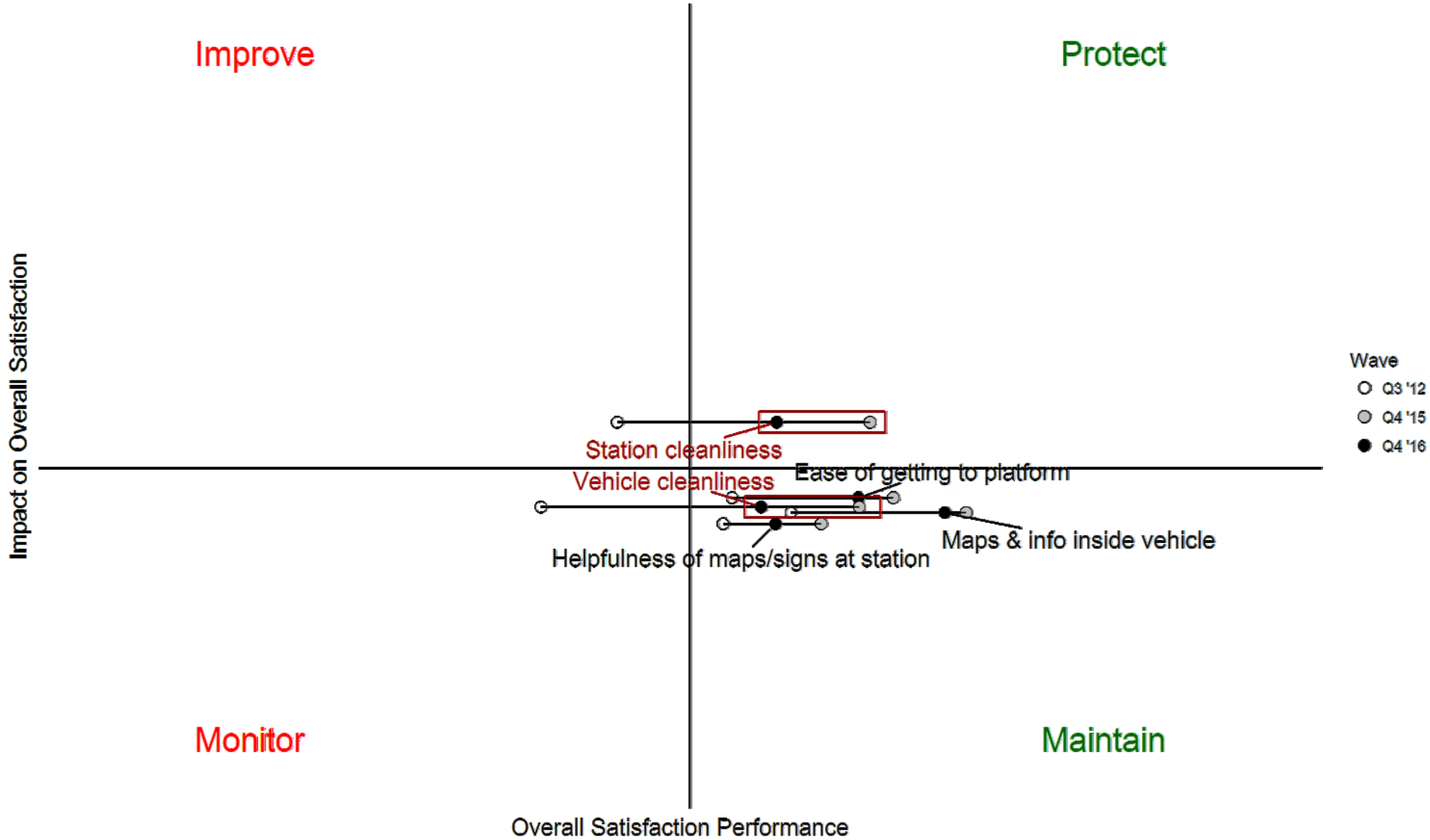


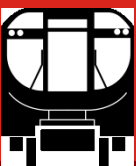


SUBWAY: ENVIRONMENT



Overall Satisfaction – Importance vs. Performance Maps: Subway



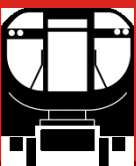


SUBWAY: STAFF SERVICE



Overall Satisfaction – Importance vs. Performance Maps: Subway

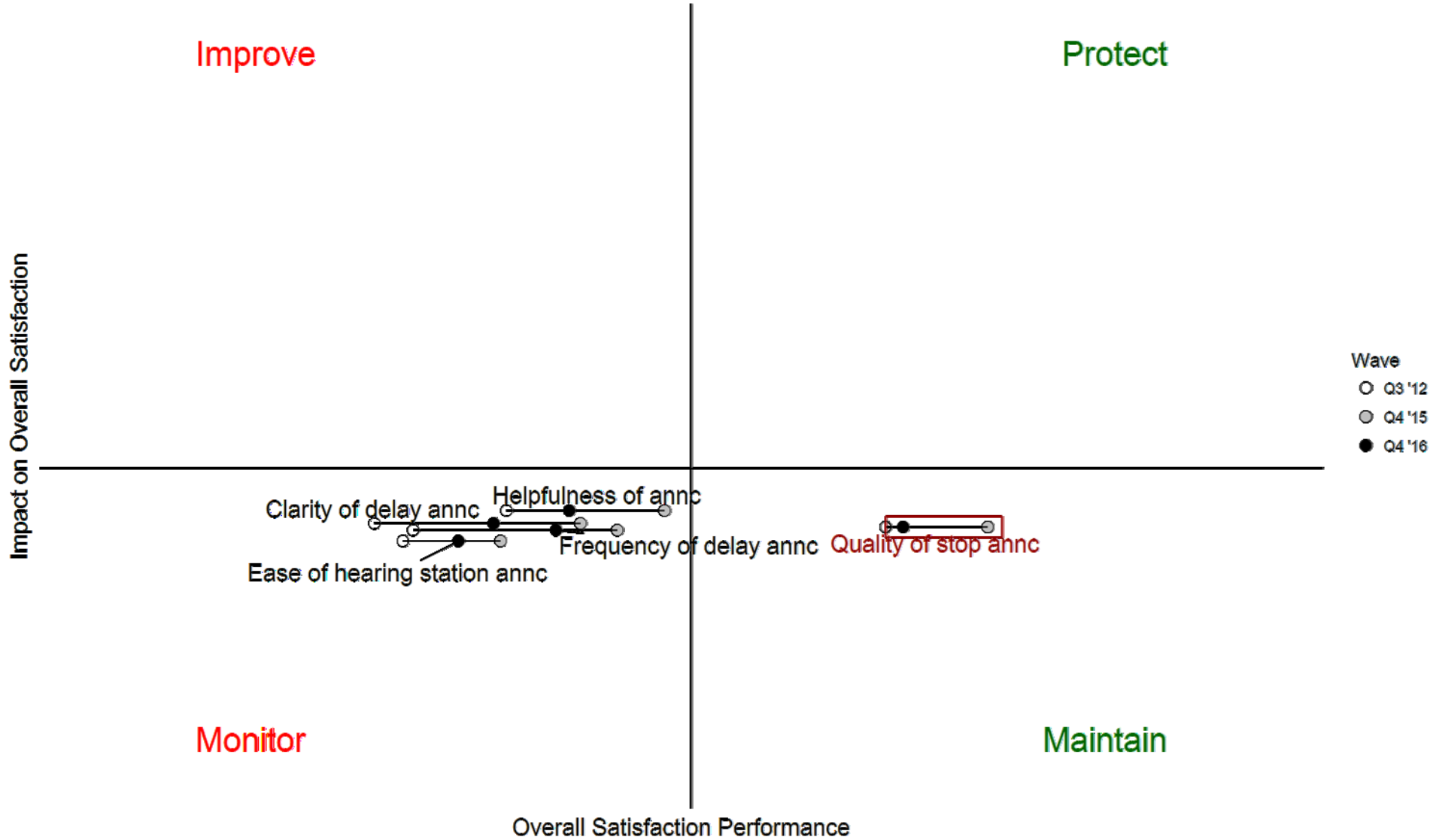




SUBWAY: INFORMATION



Overall Satisfaction – Importance vs. Performance Maps: Subway

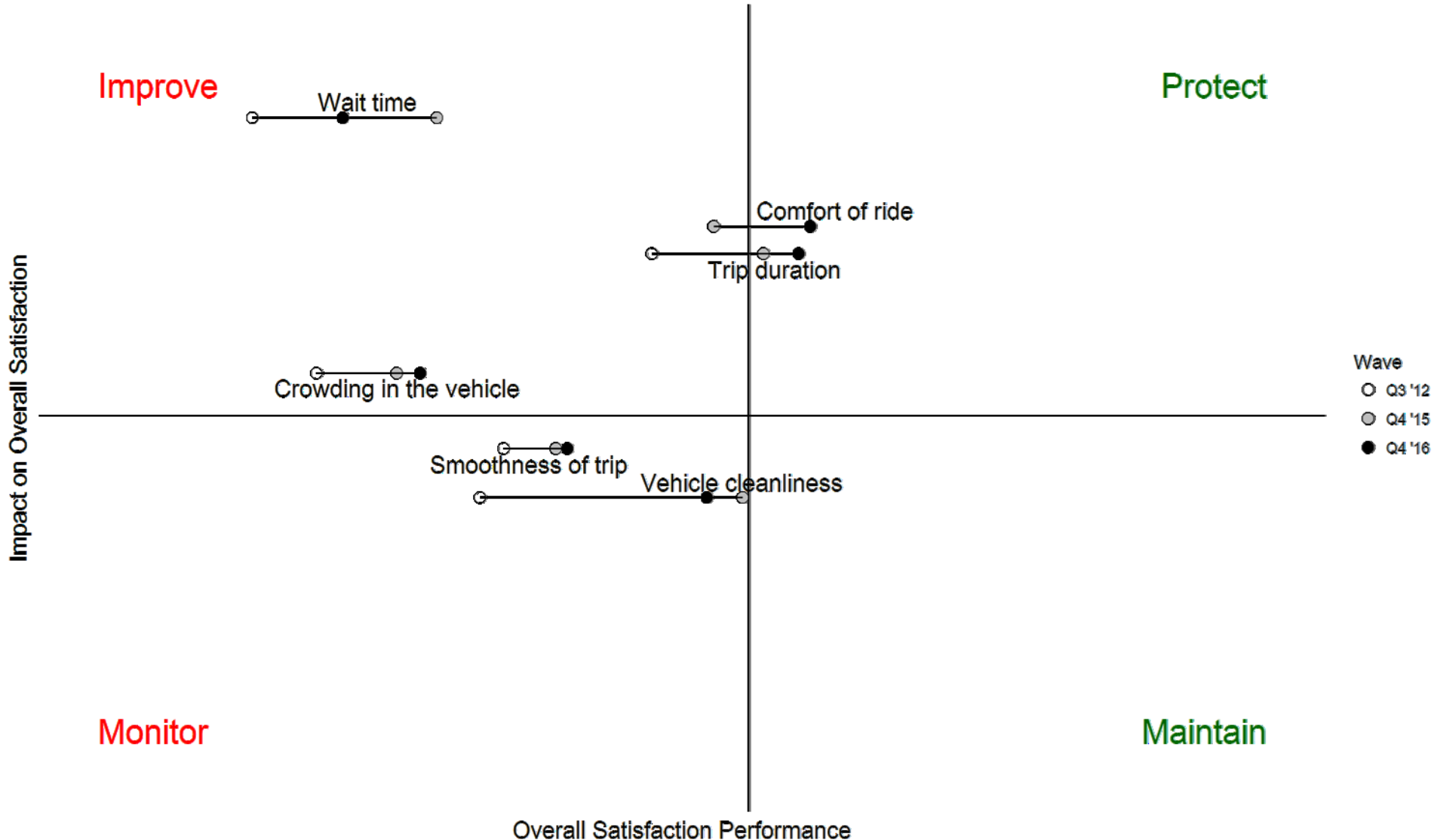




BUS: COMFORT AND CONVENIENCE

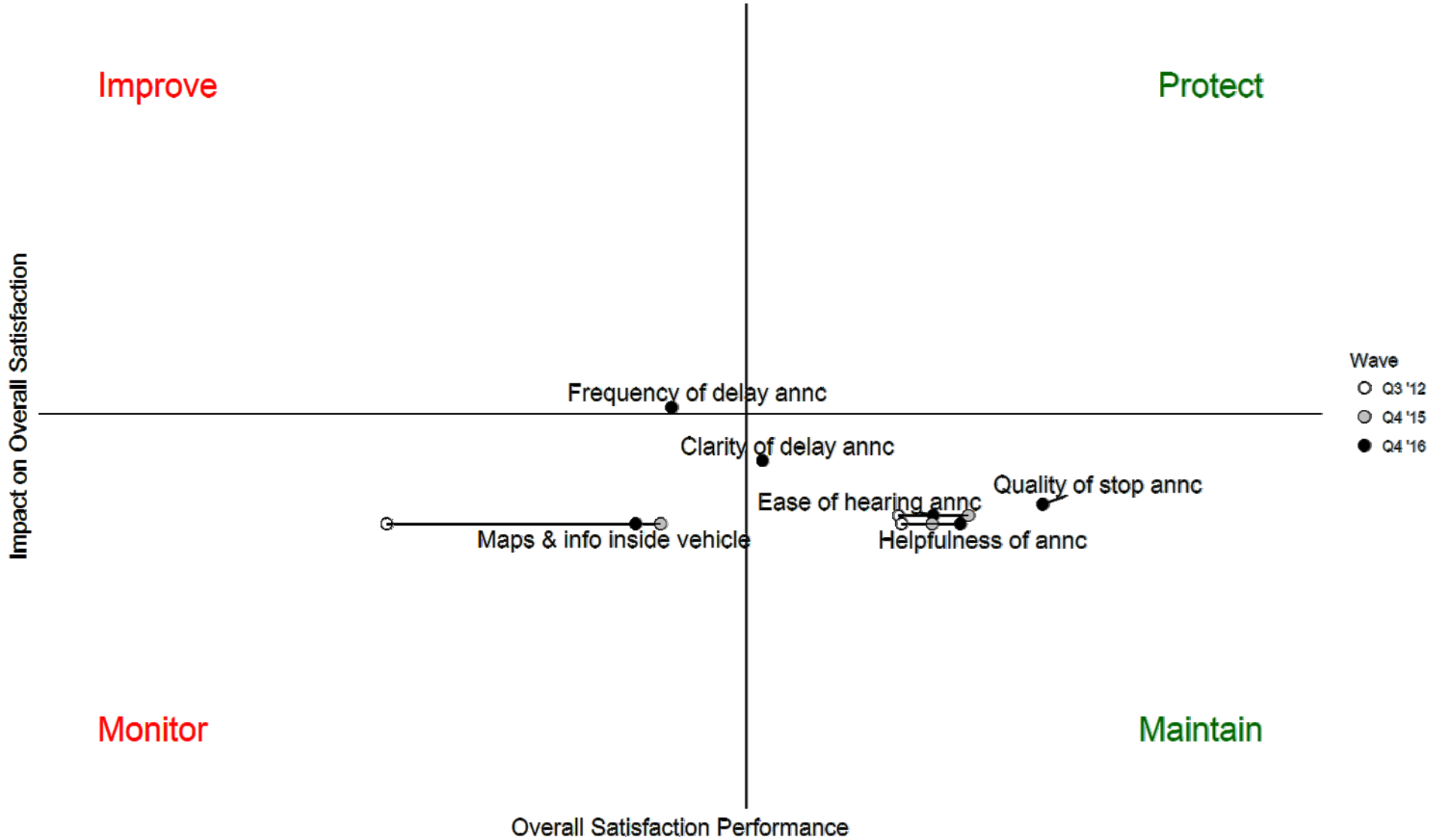


Overall Satisfaction – Importance vs. Performance Maps: Subway



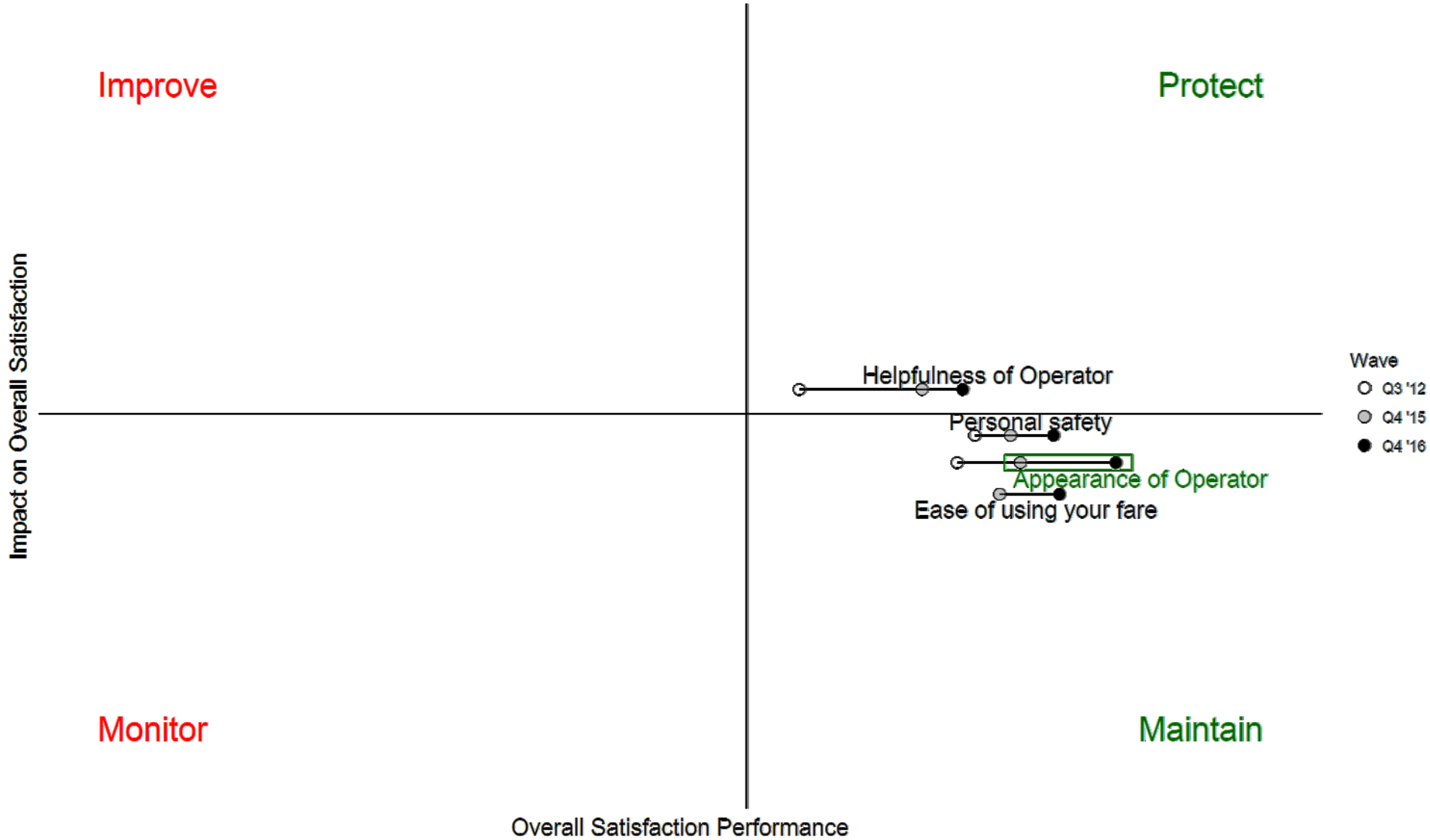


Overall Satisfaction – Importance vs. Performance Maps: Subway





Overall Satisfaction – Importance vs. Performance Maps: Subway

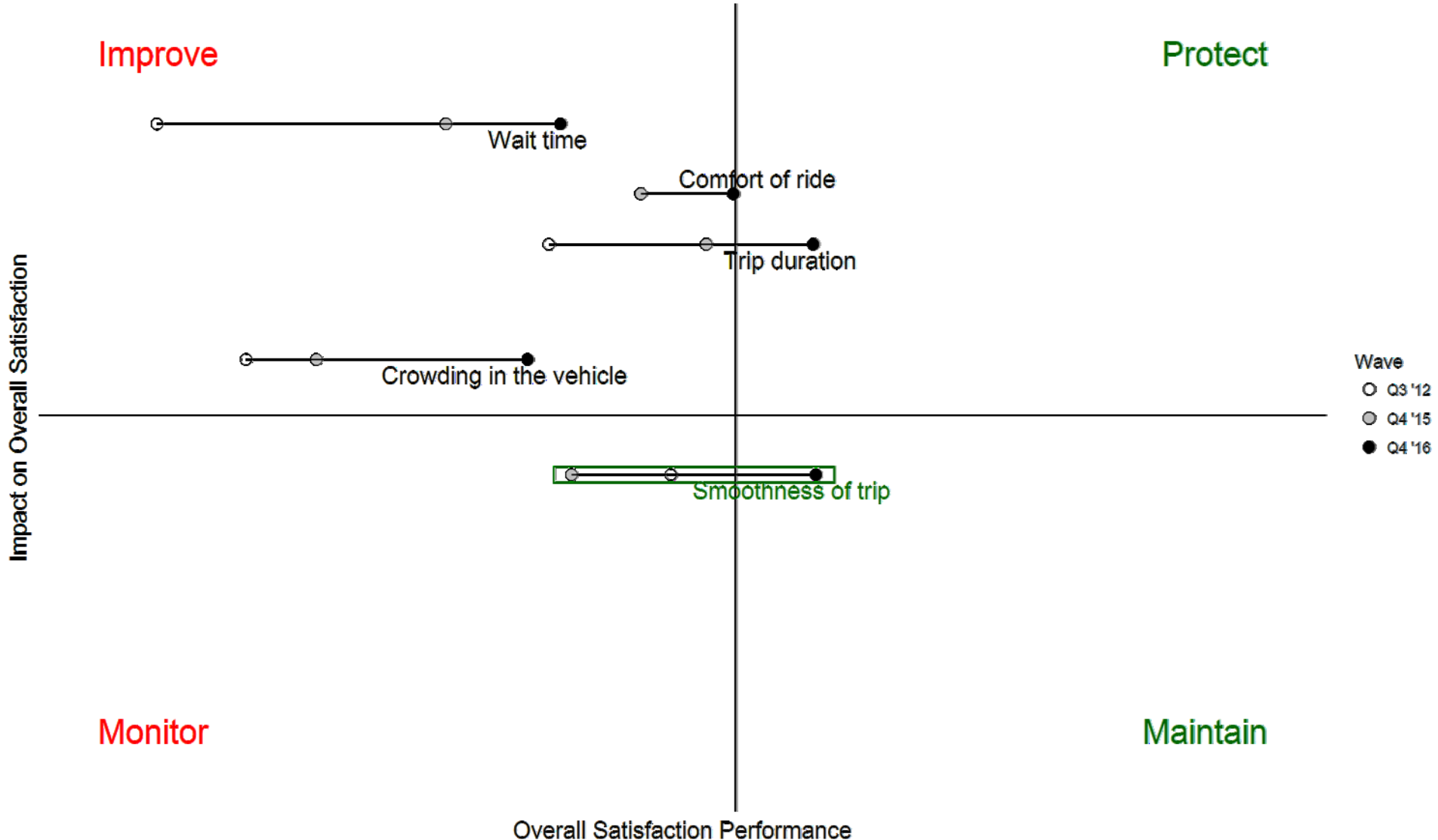




STREETCAR: COMFORT & CONVENIENCE



Overall Satisfaction – Importance vs. Performance Maps: Subway

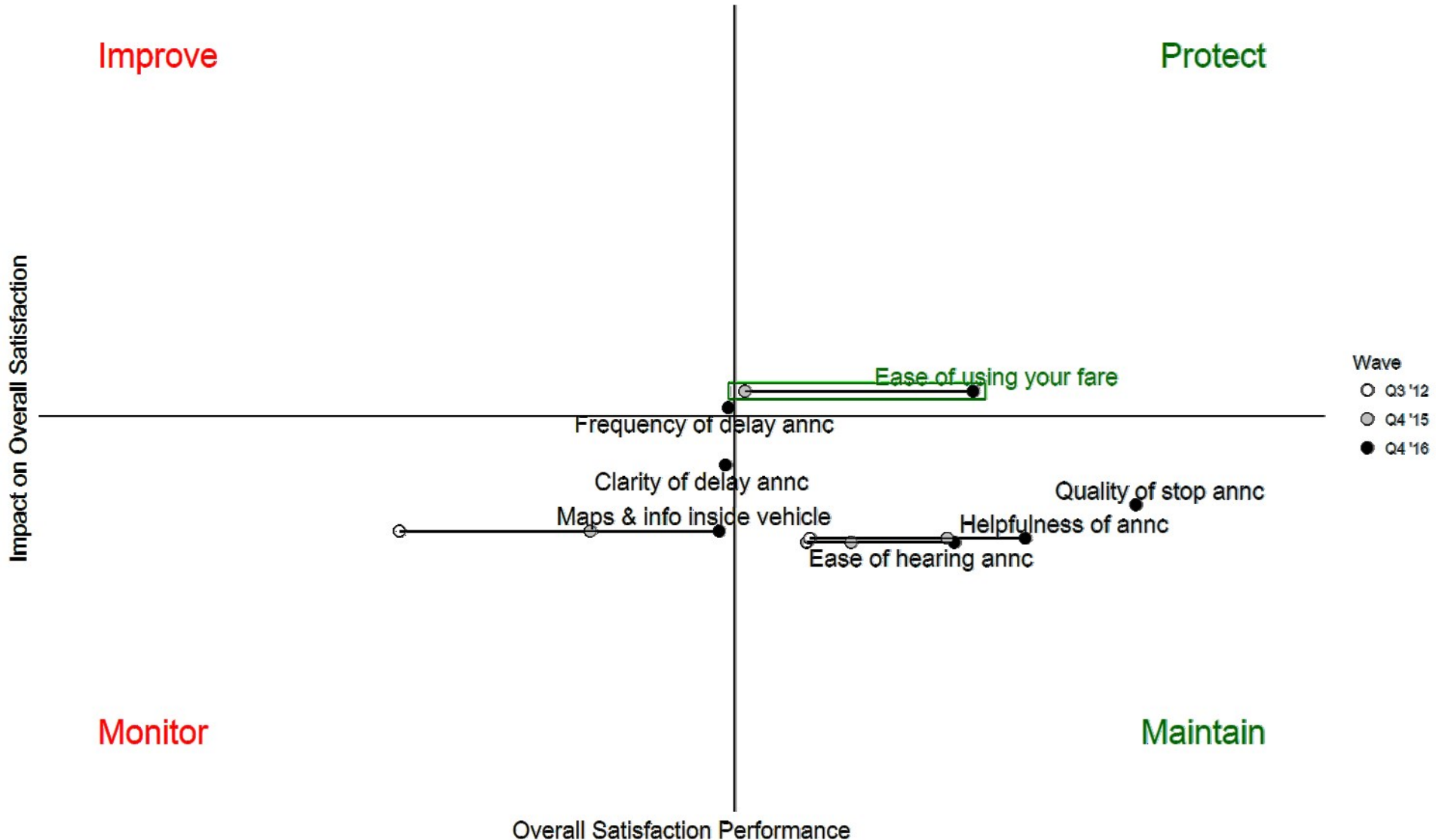




STREETCAR: INFORMATION



Overall Satisfaction – Importance vs. Performance Maps: Subway

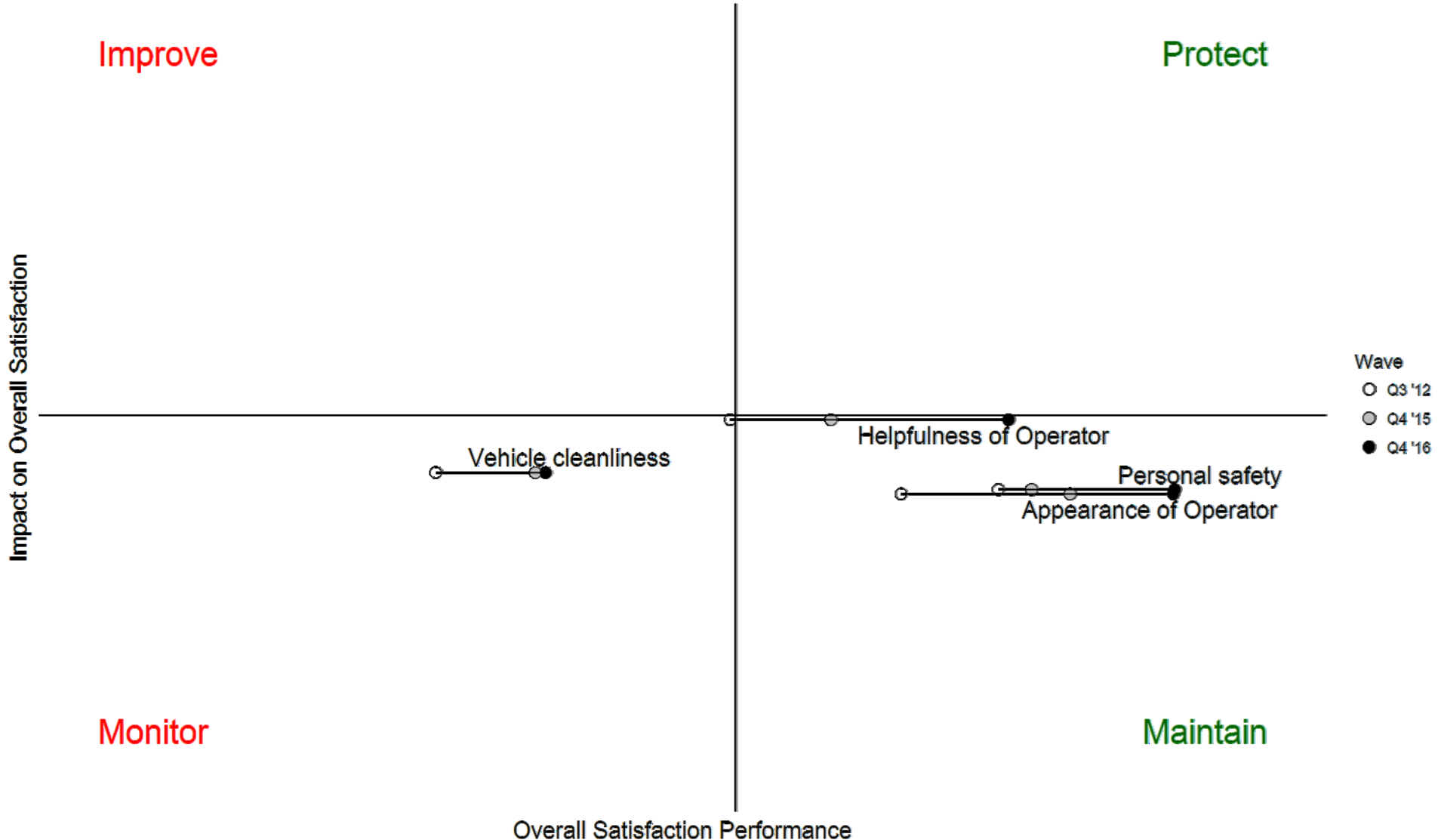




STREETCAR: STAFF SERVICE



Overall Satisfaction – Importance vs. Performance Maps: Subway



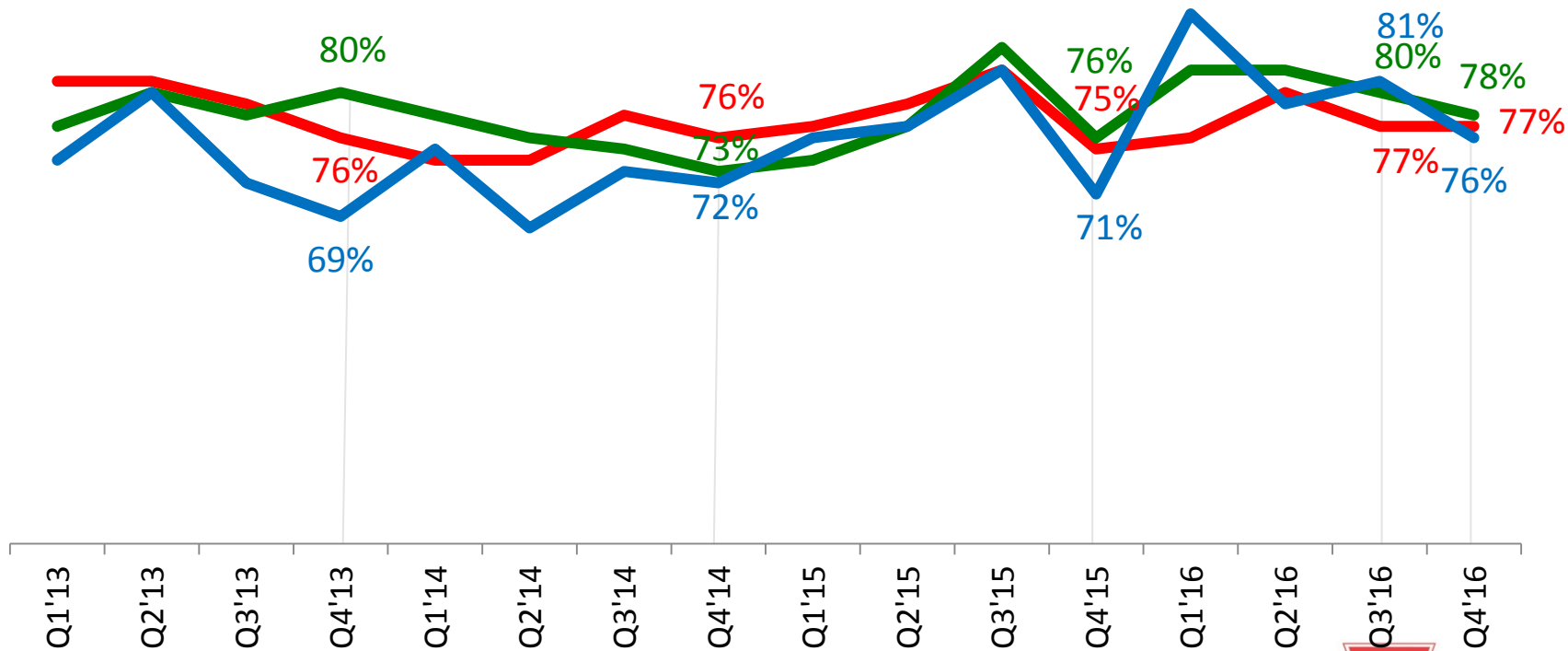
TRENDING CHARTS



THE LENGTH OF TIME YOUR TRIP TOOK



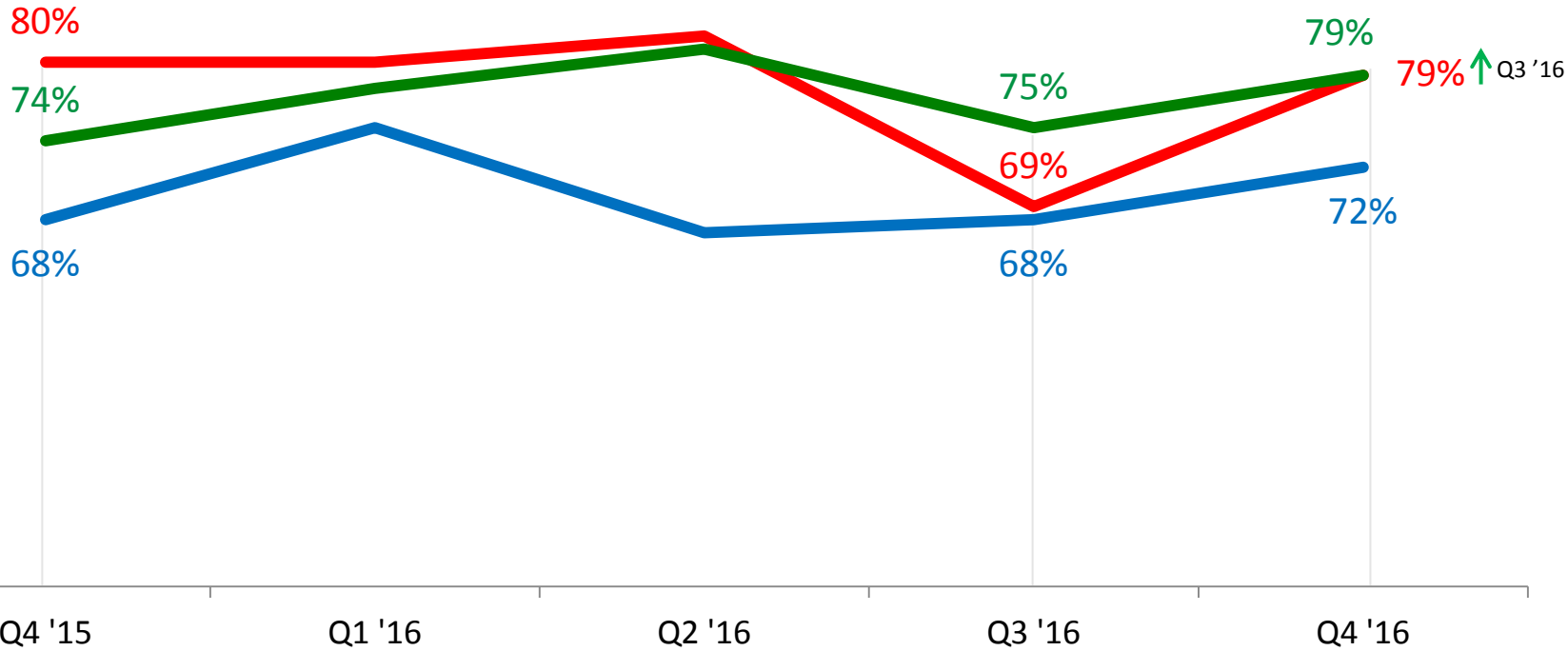
% of Respondents Rating 7-10



COMFORT OF YOUR RIDE



% of Respondents Rating 7-10



THE LENGTH OF TIME YOU WAITED FOR THE VEHICLE



SUBWAY

(n=725)



BUS

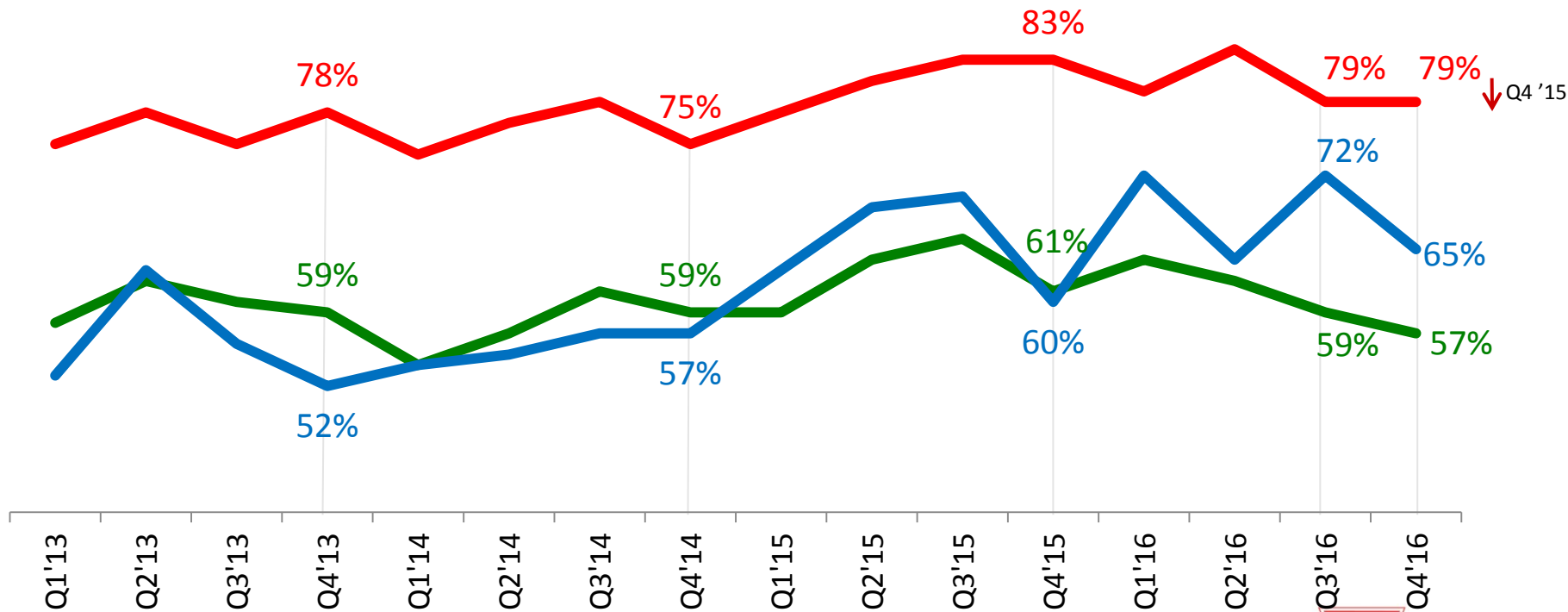
(n=547)



STREETCAR

(n=213)

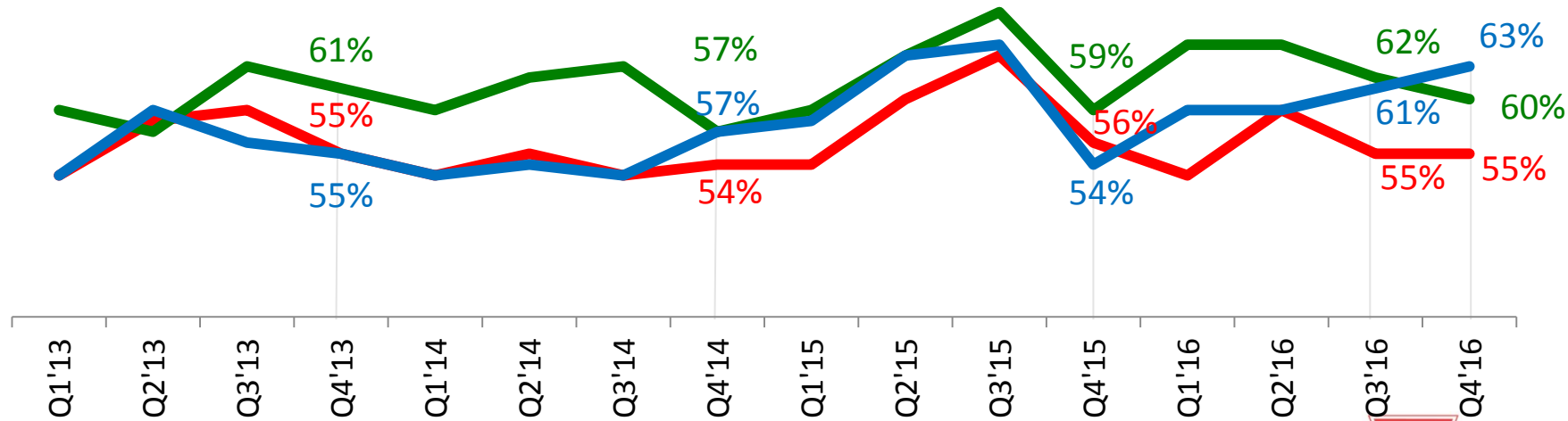
% of Respondents Rating 7-10



THE LEVEL OF CROWDING INSIDE THE VEHICLE



% of Respondents Rating 7-10



THE SMOOTHNESS & FREEDOM FROM JOLTING DURING THE TRIP



SUBWAY

(n=725)



BUS

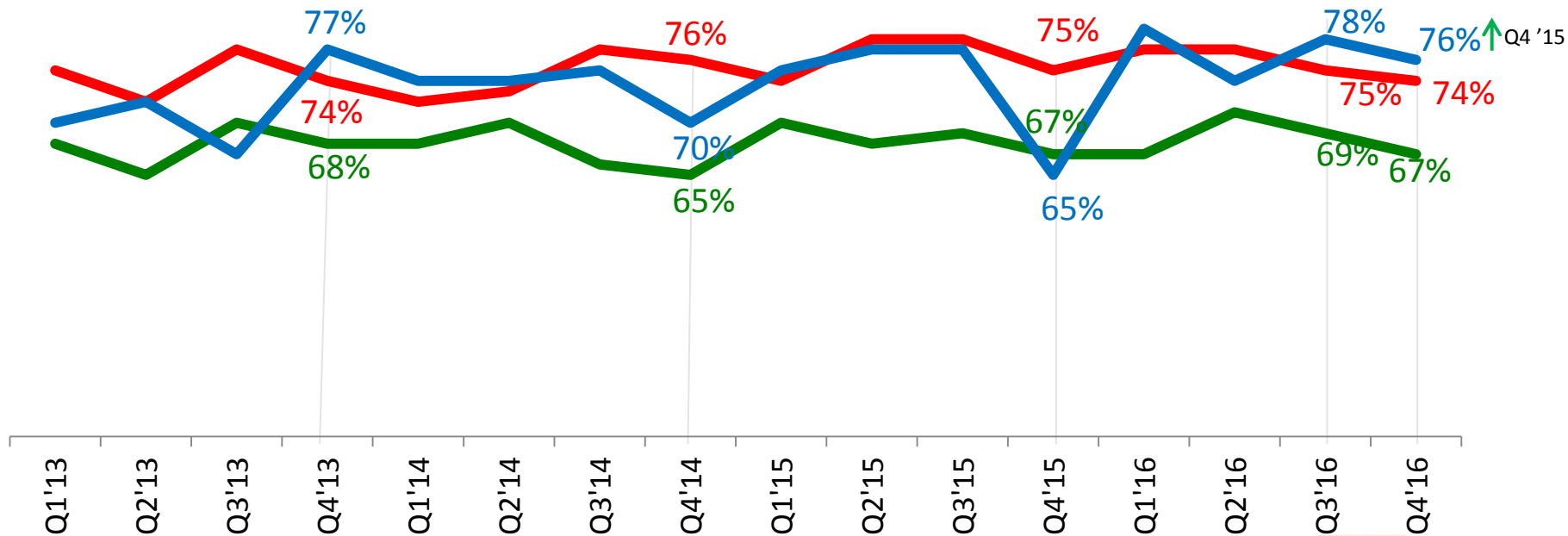
(n=547)



STREETCAR

(n=213)

% of Respondents Rating 7-10



YOUR PERSONAL SAFETY DURING THE TRIP



SUBWAY

(n=725)



BUS

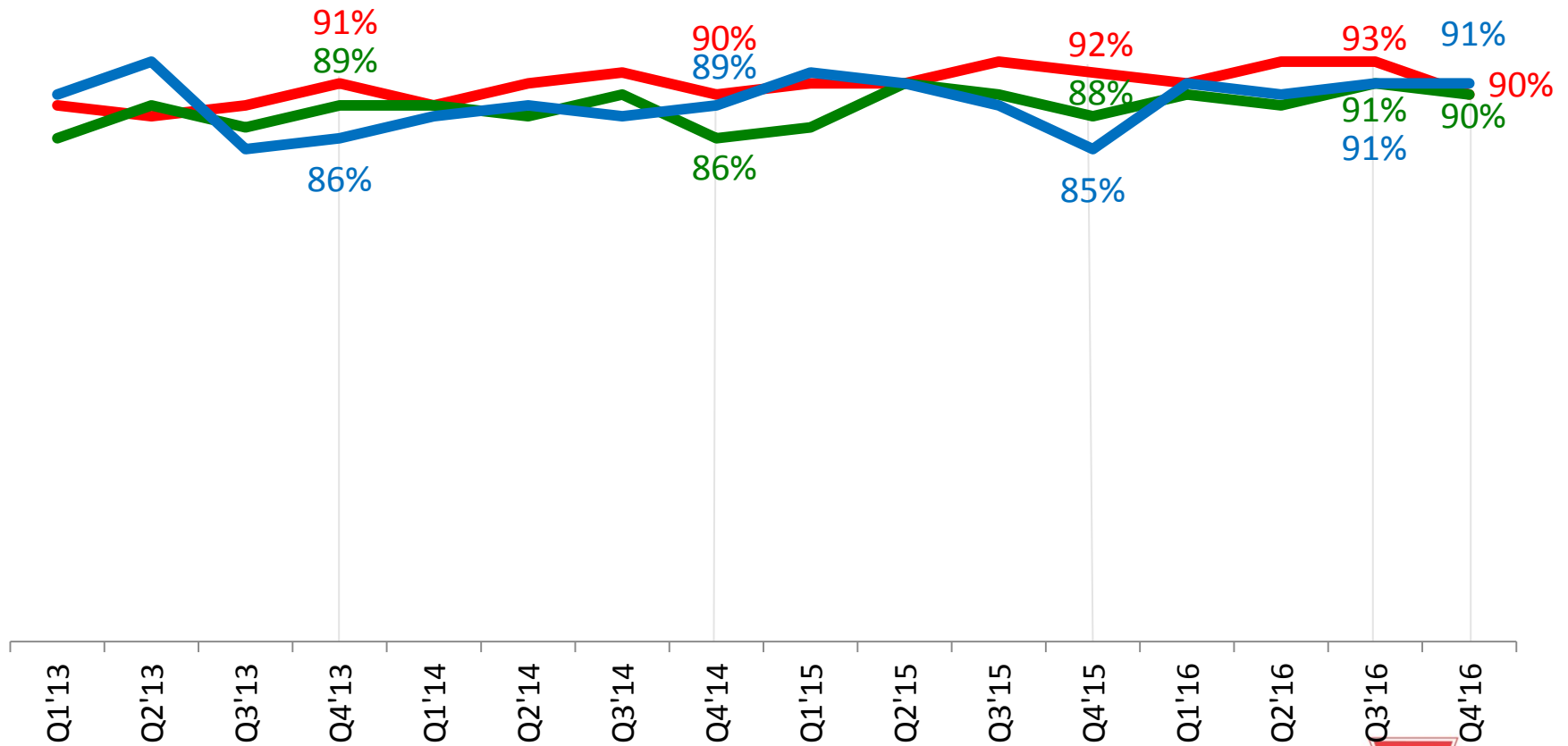
(n=547)



STREETCAR

(n=213)

% of Respondents Rating 7-10



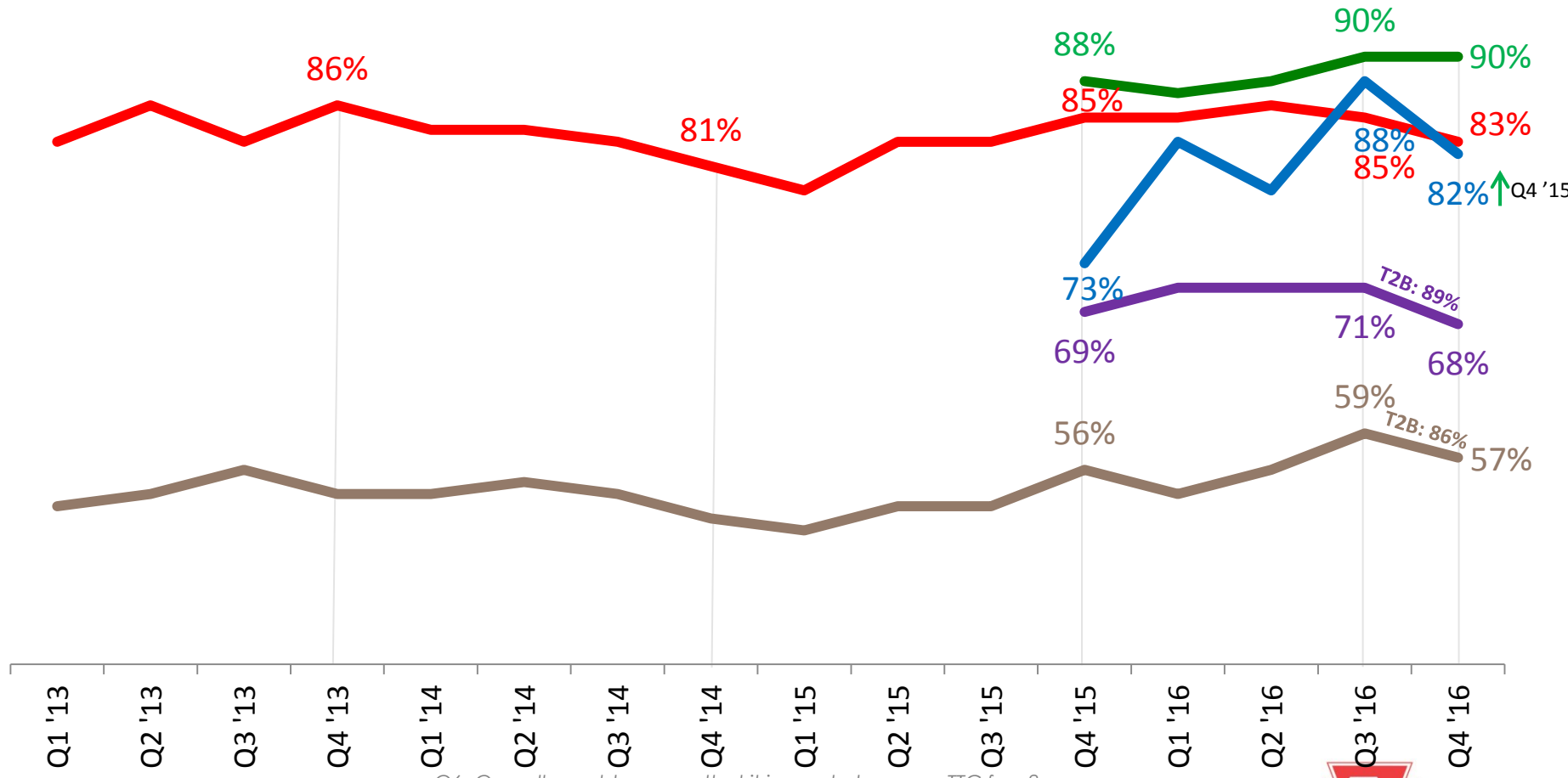
EASE OF USING OR PAYING YOUR FARE (TOKEN/TICKET, METROPASS, PRESTO, ETC)

% of Respondents Rating 7-10



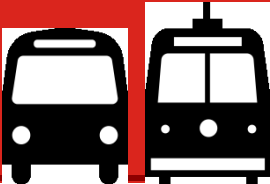
Very Easy (T1B)
Buy - Overall (n=1001)

Very Easy (T1B)
USE - Overall (n=1001)



Q6. Overall, would you say that it is ____ to buy your TTC fare?
Q6A. Overall, would you say that it is ____ to use your TTC fare?





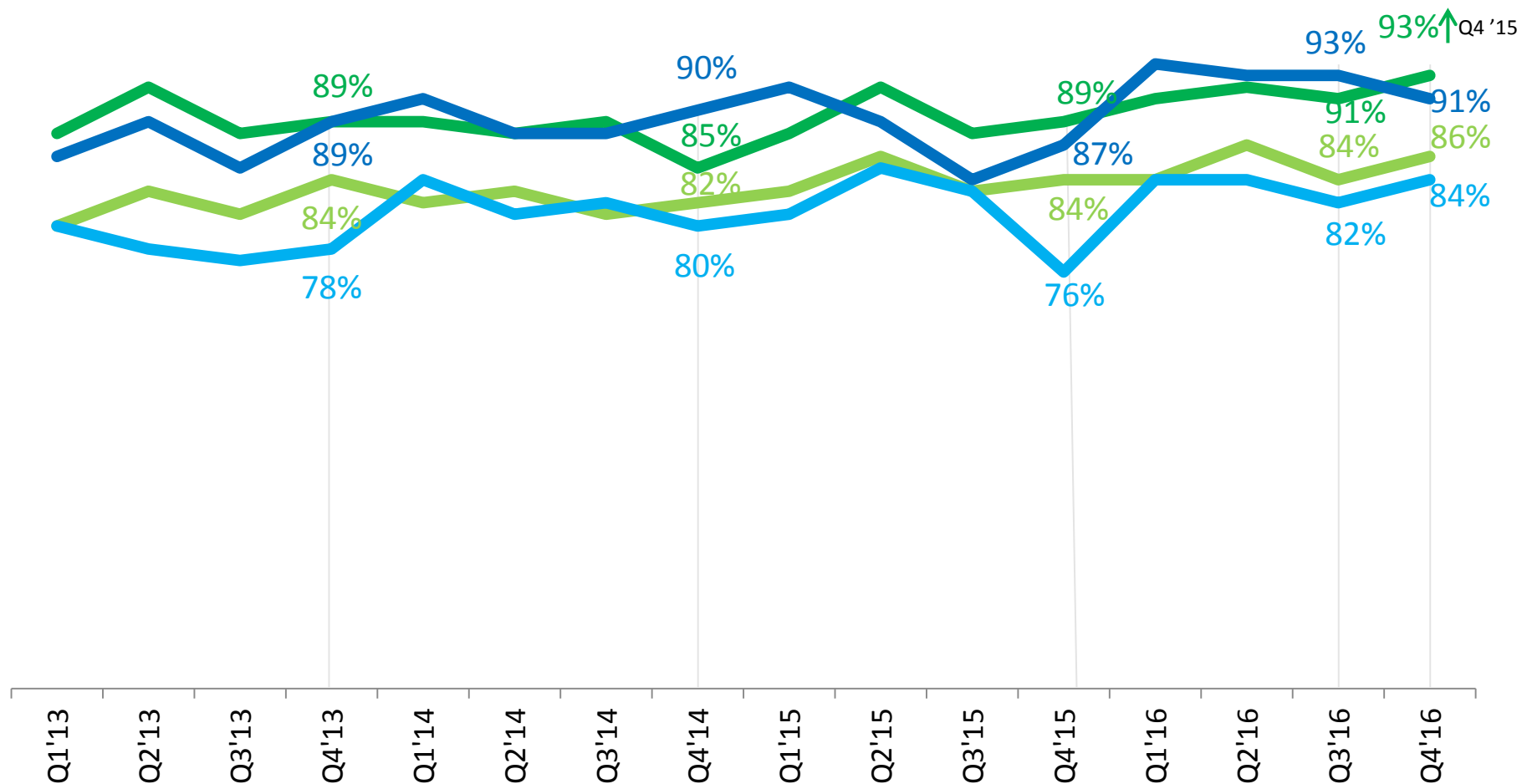
BUS/STREETCAR OPERATORS



Bus - Appearance of operator (n=547)
Streetcar - Appearance of operator (n=213)

Bus - Helpfulness of operator (n=547)
Streetcar - Helpfulness of operator (n=213)

% of Respondents Rating 7-10



THE CLEANLINESS & FREEDOM FROM LITTER INSIDE THE VEHICLE



SUBWAY

(n=725)



BUS

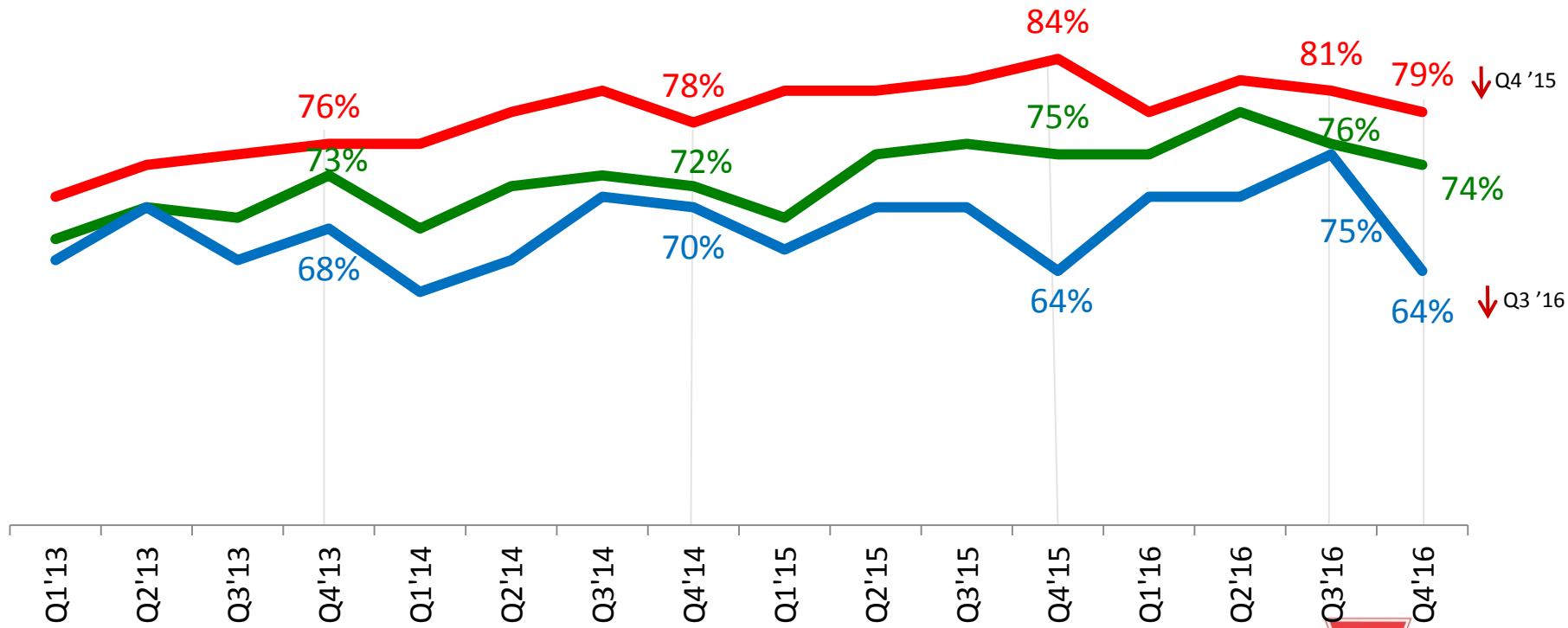
(n=547)



STREETCAR

(n=213)

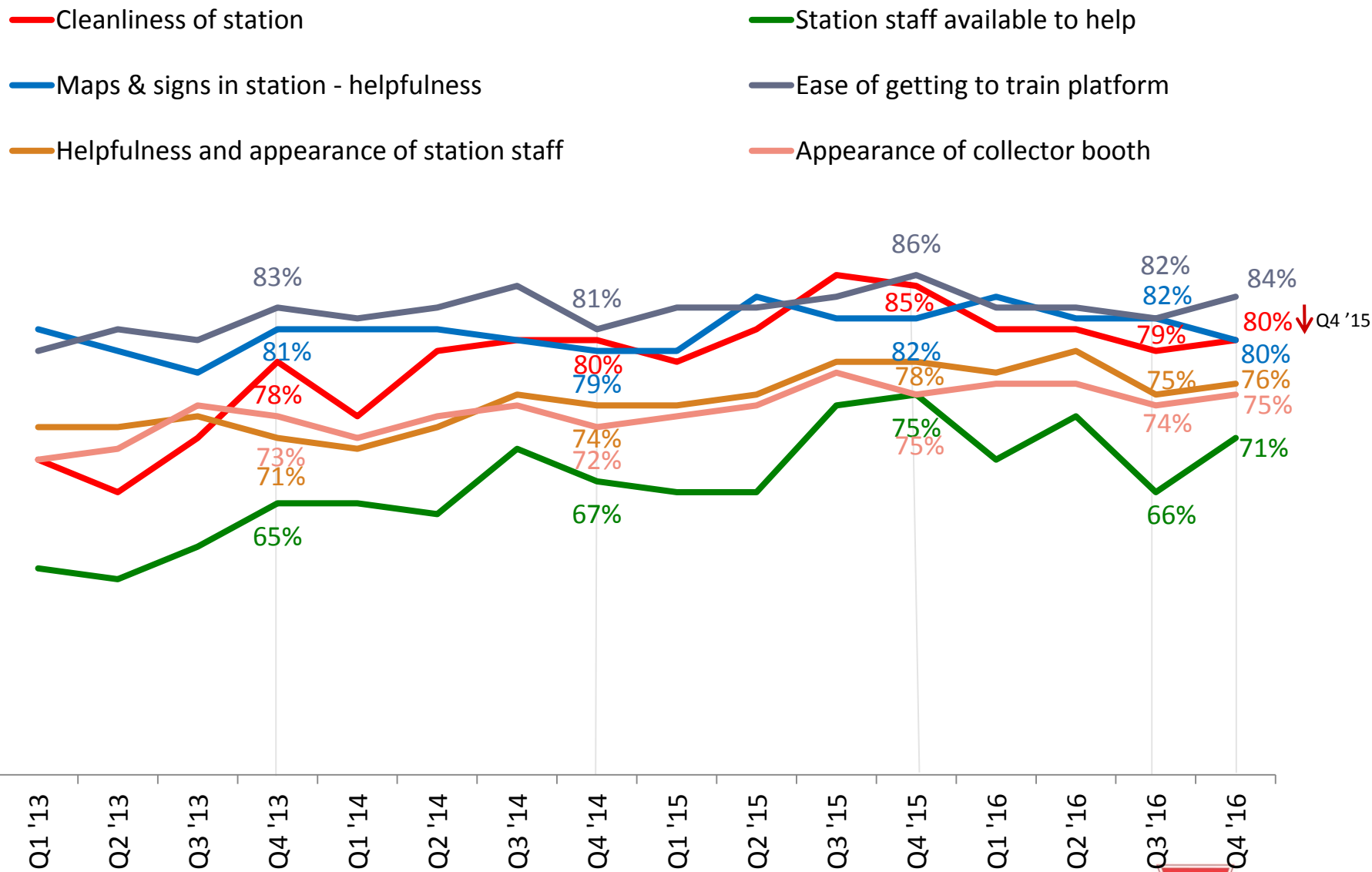
% of Respondents Rating 7-10





SUBWAY: STATION SPECIFIC ATTRIBUTES

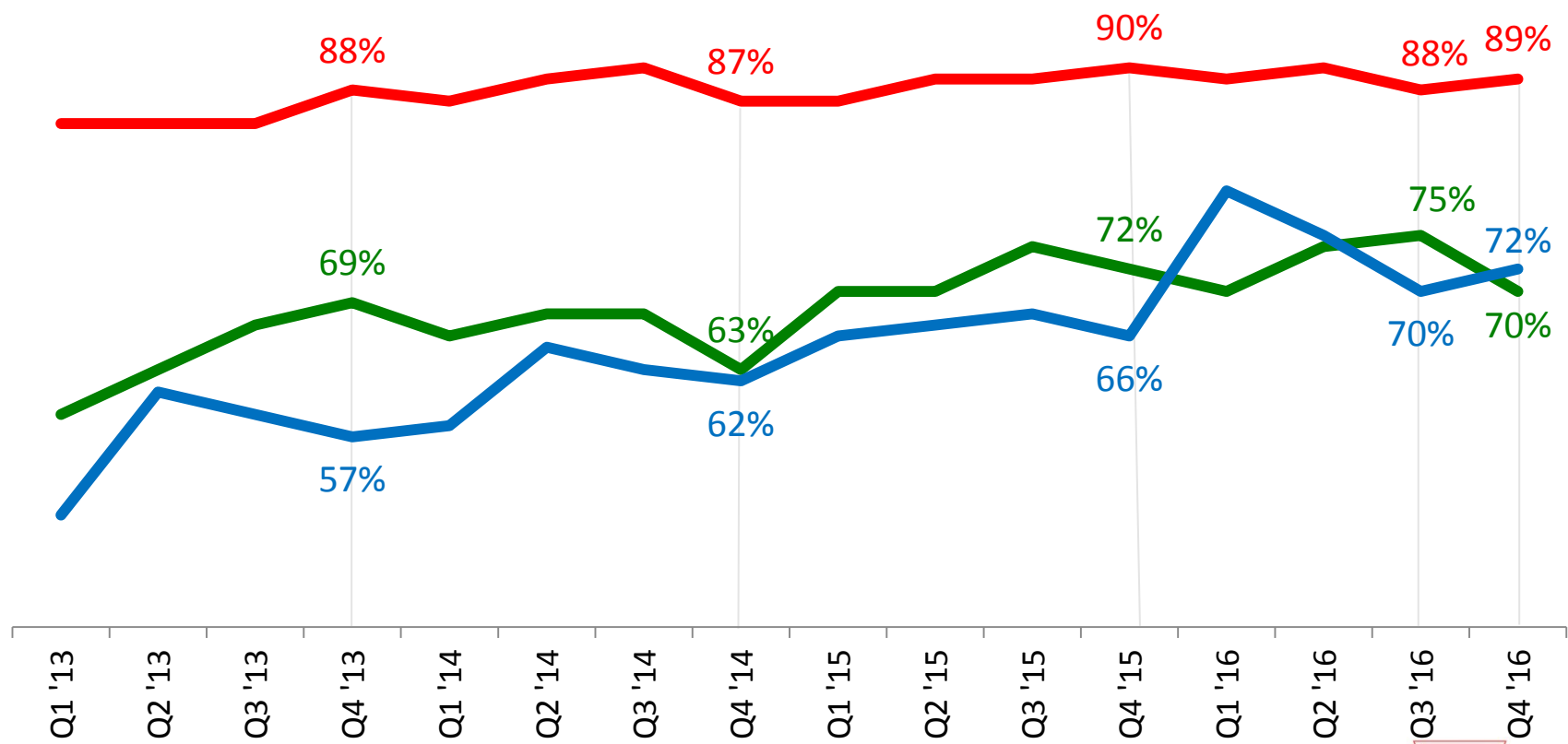
% of Respondents Rating 7-10



THE MAPS & INFORMATION INSIDE THE VEHICLE



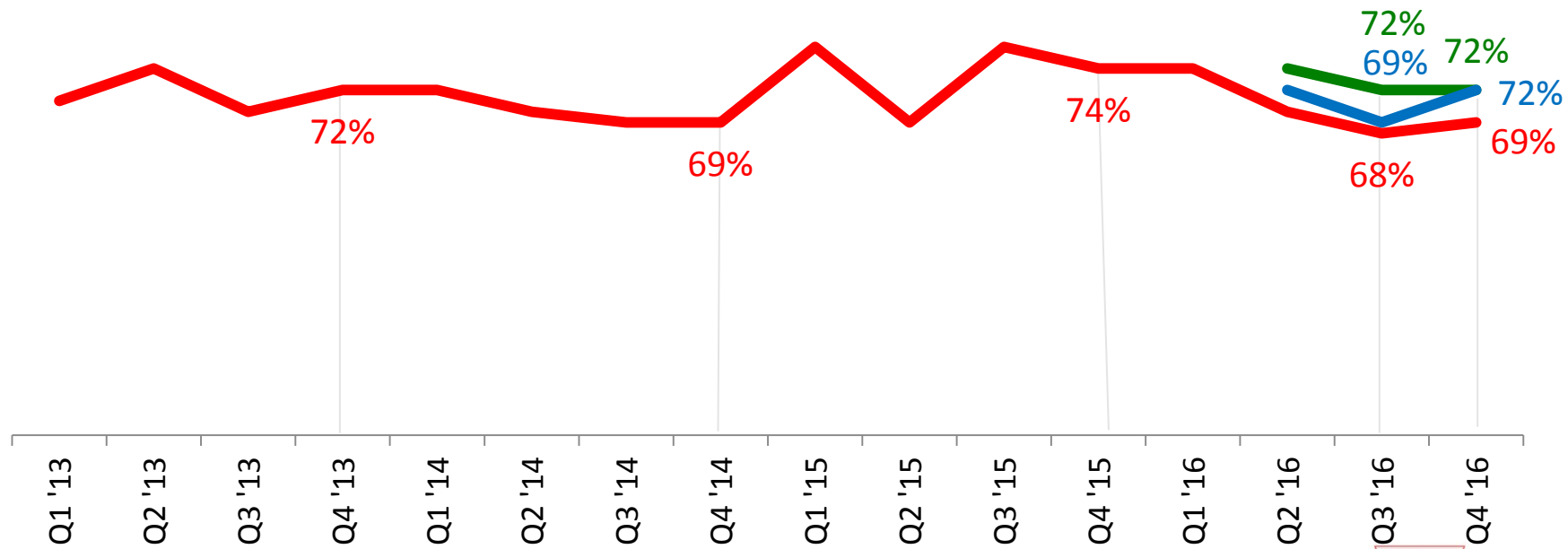
% of Respondents Rating 7-10



FREQUENCY OF DELAY ANNOUNCEMENTS



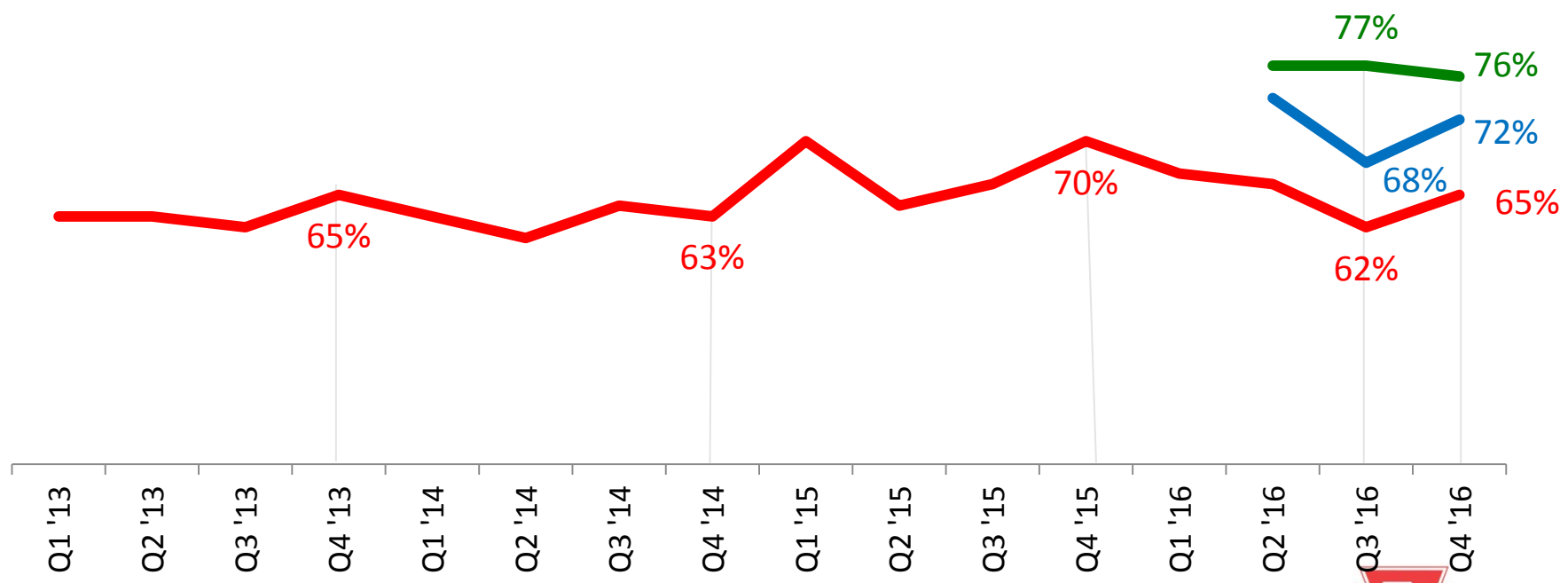
% of Respondents Rating 7-10



CLARITY OF ANNOUNCEMENTS



% of Respondents Rating 7-10



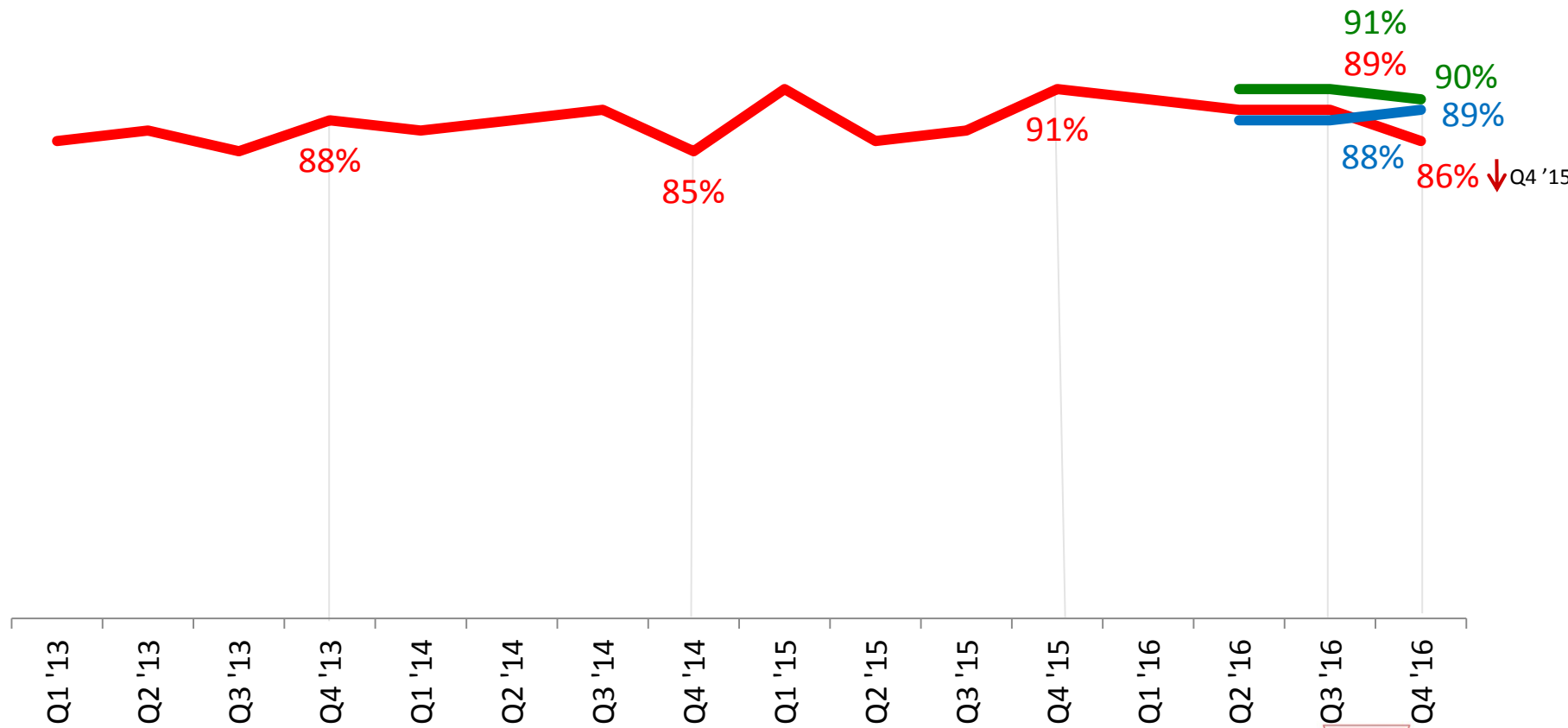
QUALITY OF STOP ANNOUNCEMENTS

% of Respondents Rating 7-10


SUBWAY
(n=725)

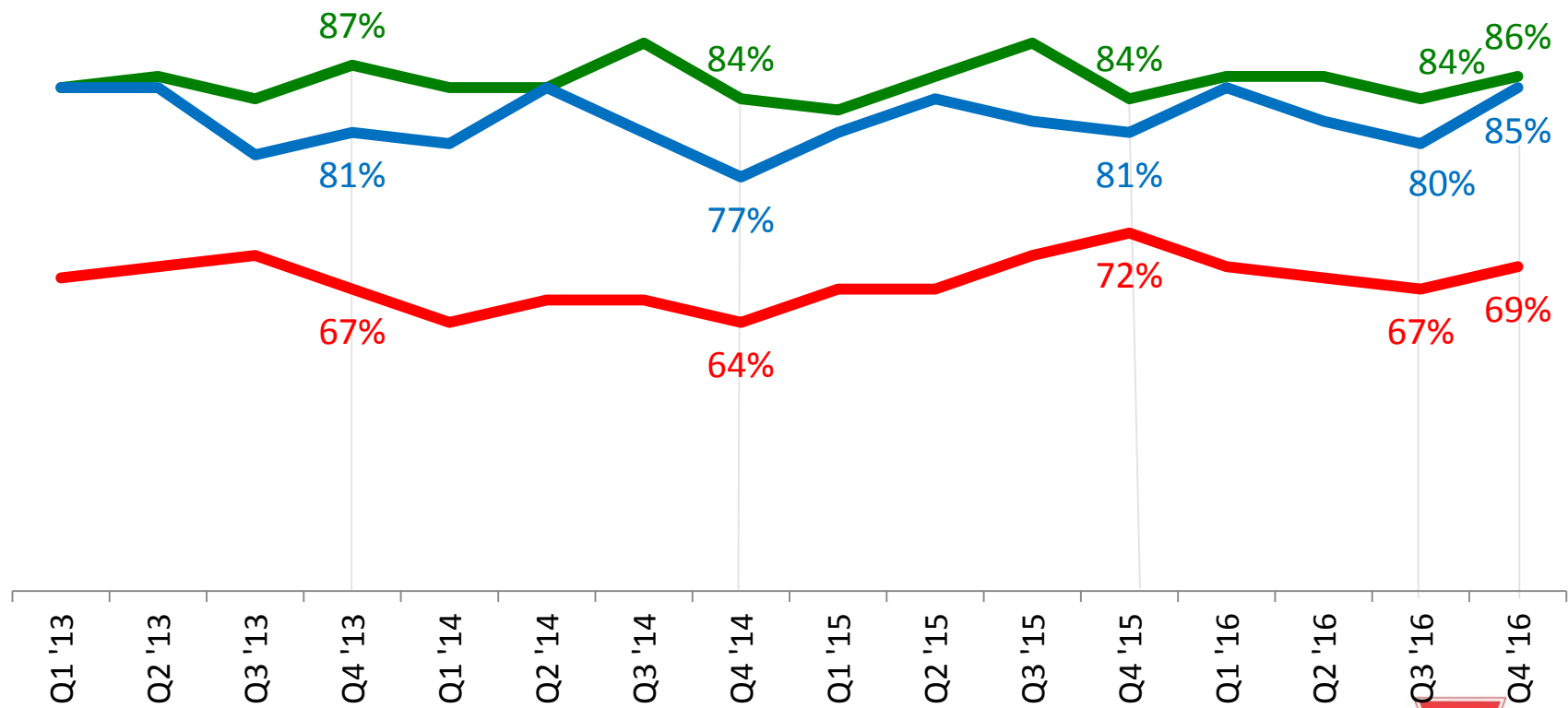

BUS
(n=547)


STREETCAR
(n=213)



HELPFULNESS OF ANNOUNCEMENTS

% of Respondents Rating 7-10



EASE OF HEARING ANNOUNCEMENTS



SUBWAY
(n=725)

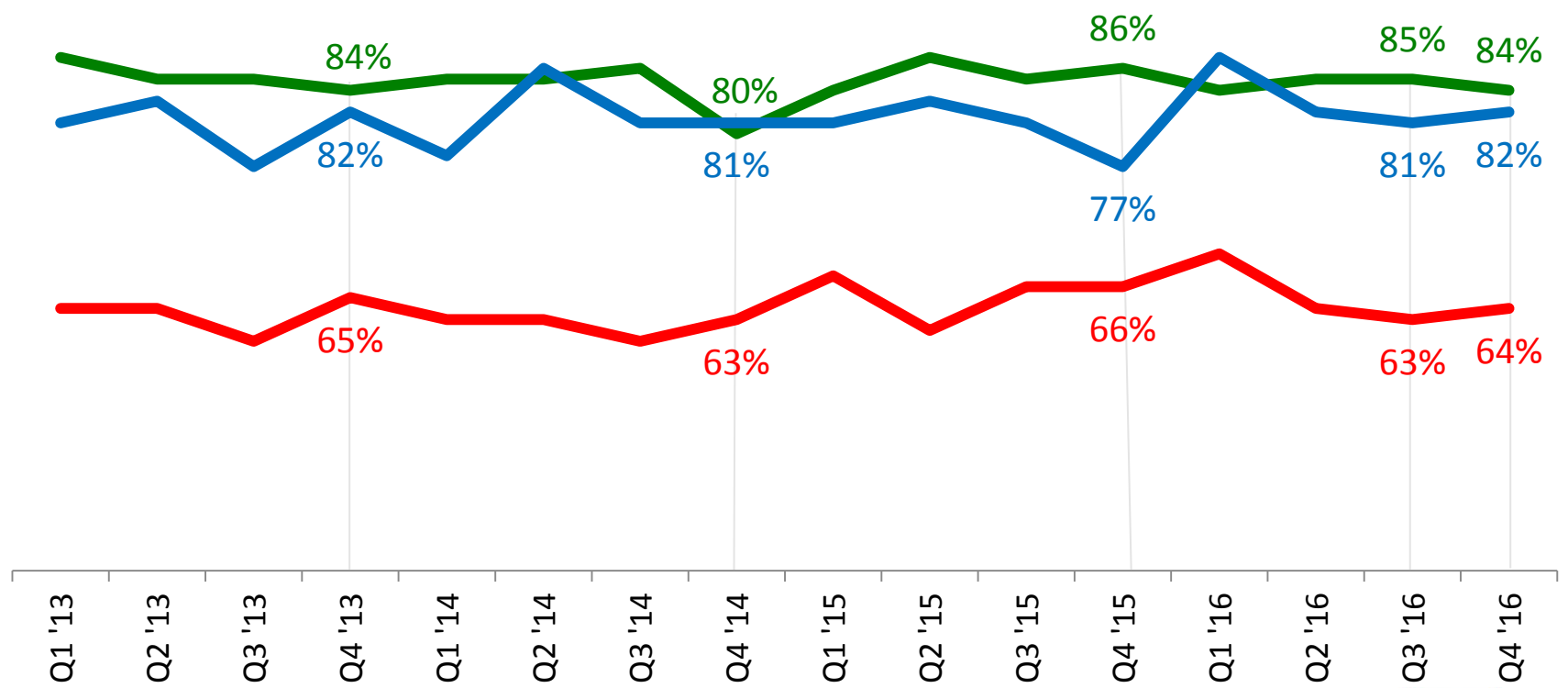


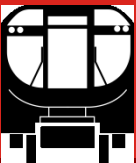
BUS
(n=547)



STREETCAR
(n=213)

% of Respondents Rating 7-10



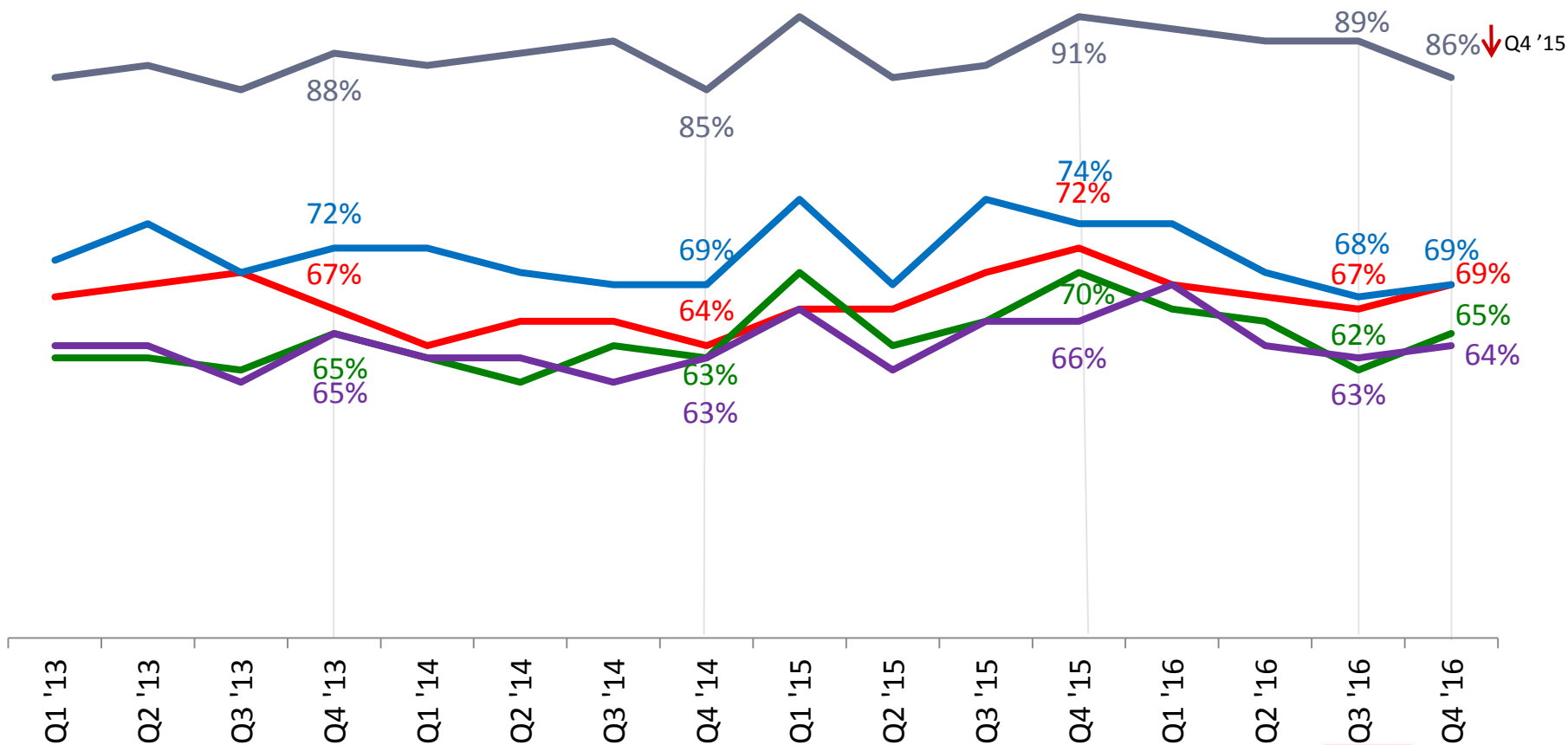


SUBWAY: ANNOUNCEMENTS



- Helpfulness of announcements
- Frequency of announcements (delays)
- Ease of hearing announcements (station)
- Clarity of announcements (delays)
- Quality of announcements (stop)

% of Respondents Rating 7-10



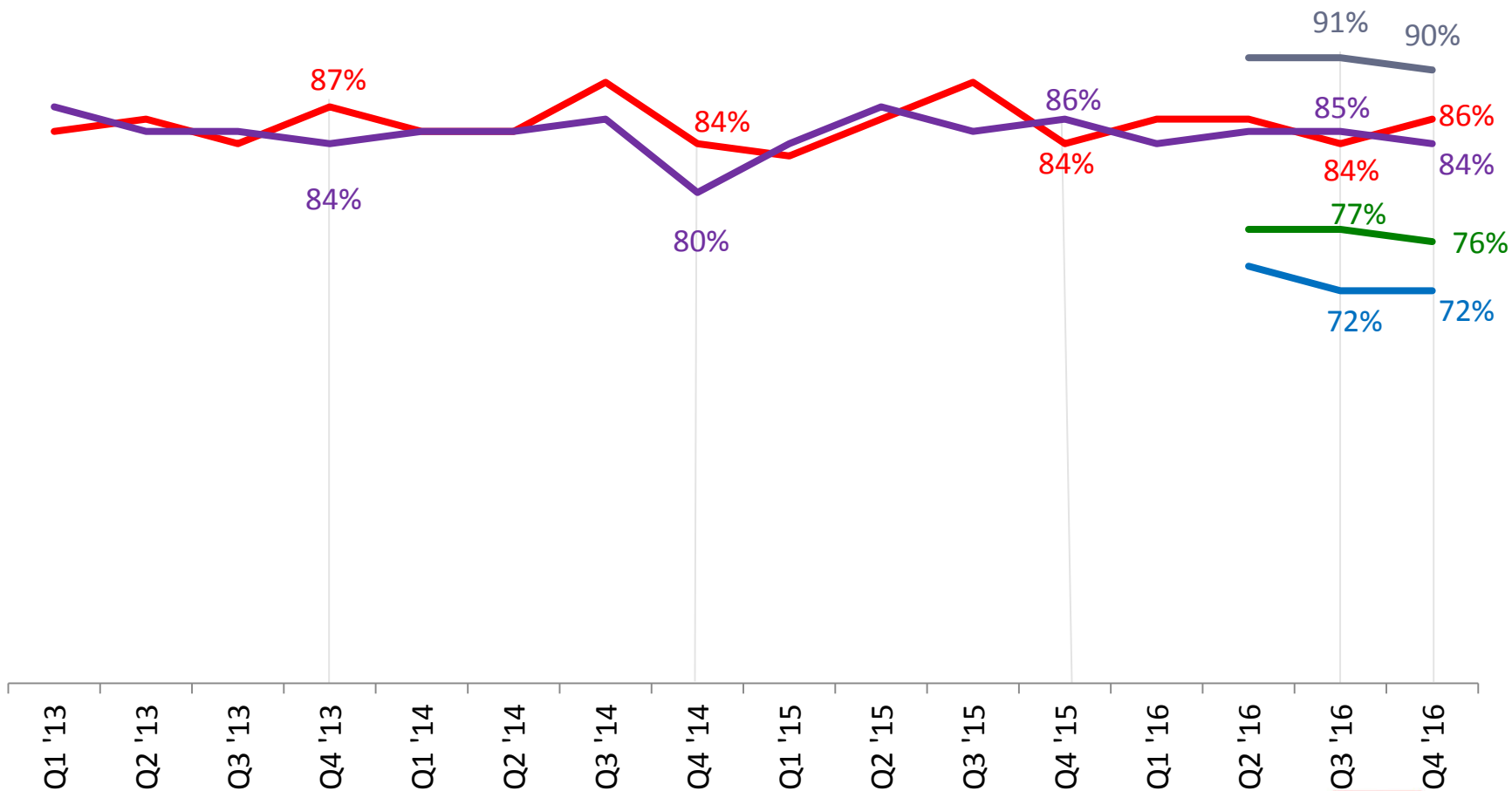


BUS: ANNOUNCEMENTS



- Helpfulness of announcements
- Frequency of announcements (delays)
- Ease of hearing announcements
- Clarity of announcements (delays)
- Quality of announcements (stop)

% of Respondents Rating 7-10



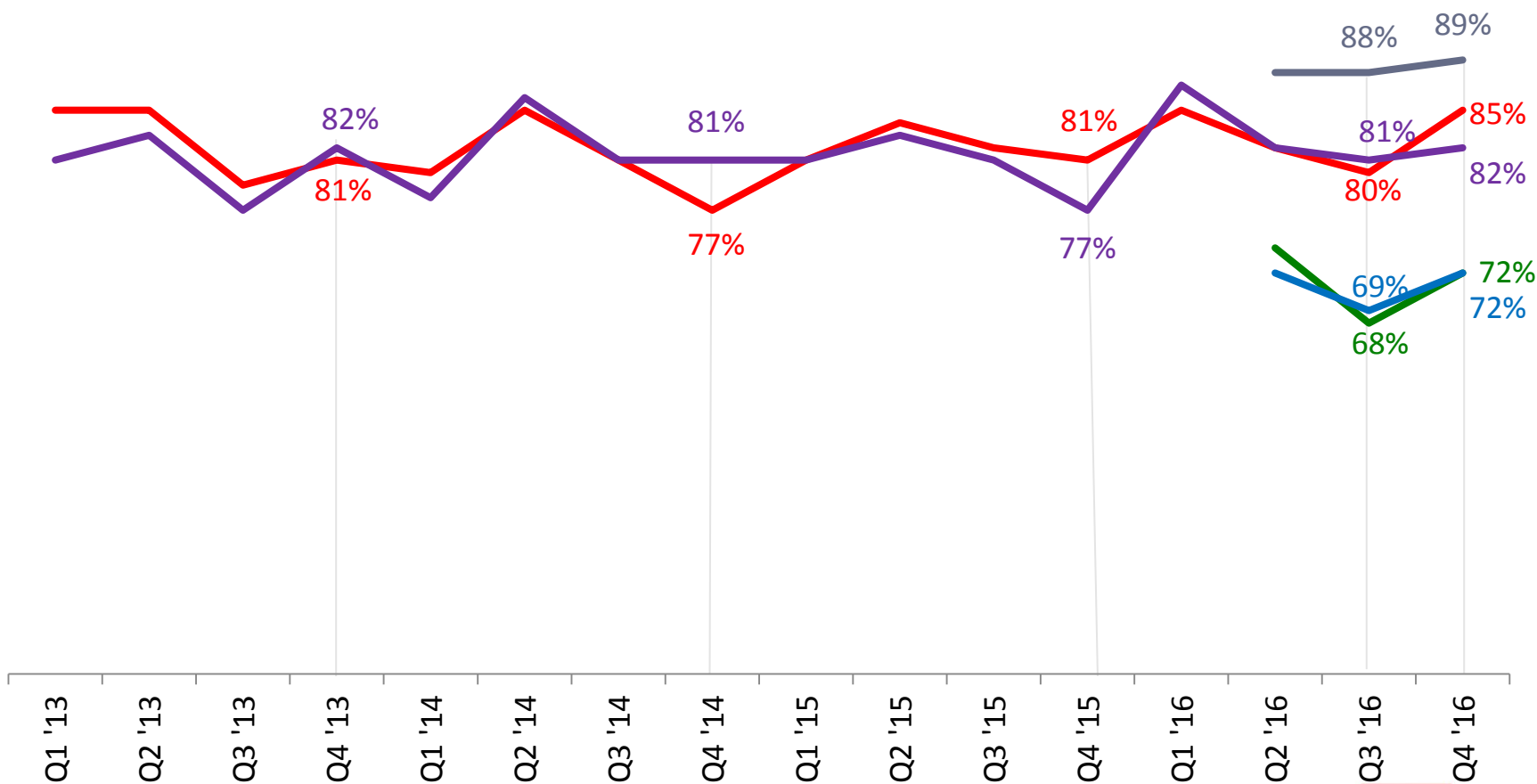


STREETCAR: ANNOUNCEMENTS



- Helpfulness of announcements
- Frequency of announcements (delays)
- Ease of hearing announcements
- Clarity of announcements (delays)
- Quality of announcements (stop)

% of Respondents Rating 7-10





LINE 1 AND LINE 2 RIDERS



SATISFACTION AMONG LINE 2 RIDERS INCREASED THIS WAVE

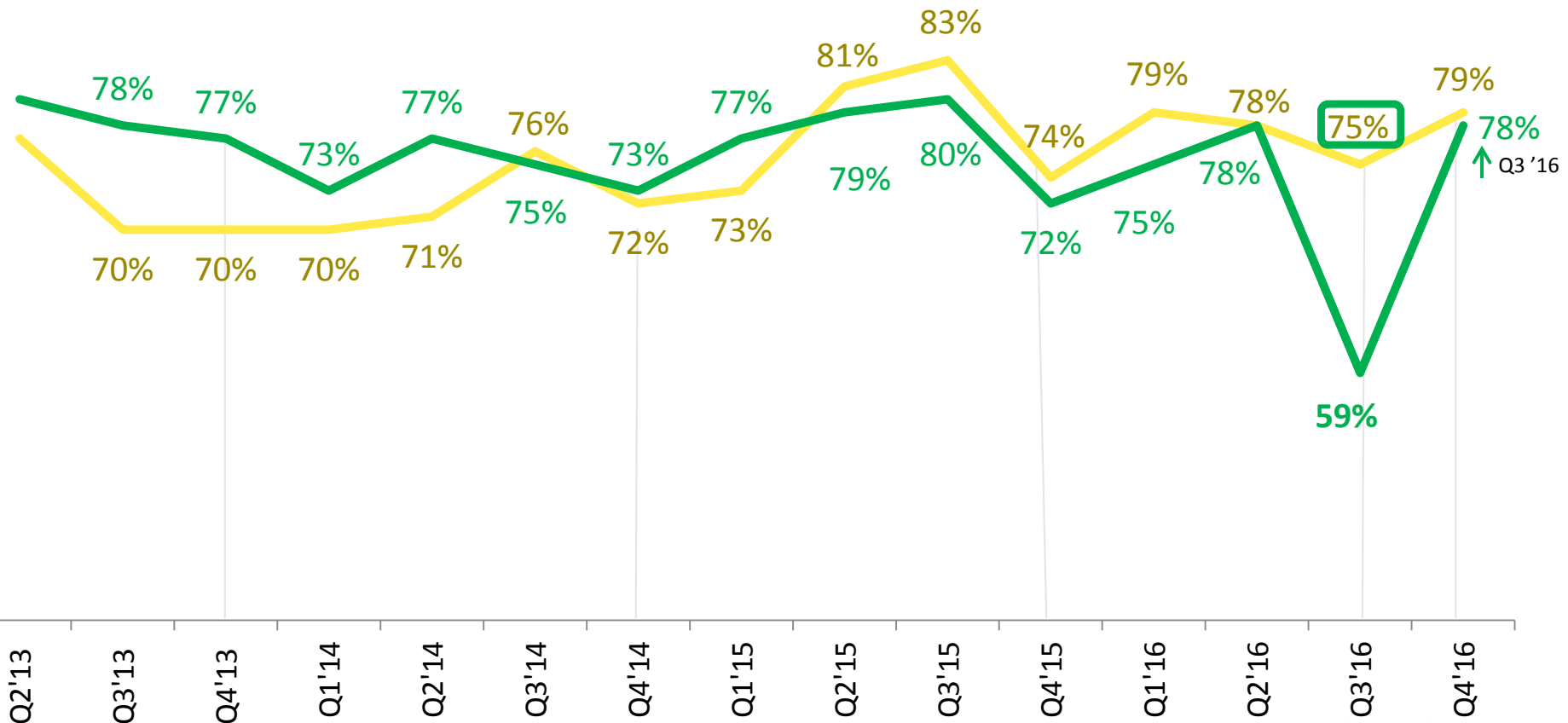
Customer Satisfaction Over Time
(T4B; Q2 2013 – Q4 2016)

Line 1 Line 2

Q4'16 % of
Total Sample

Line 1: 44%

Line 2: 28%



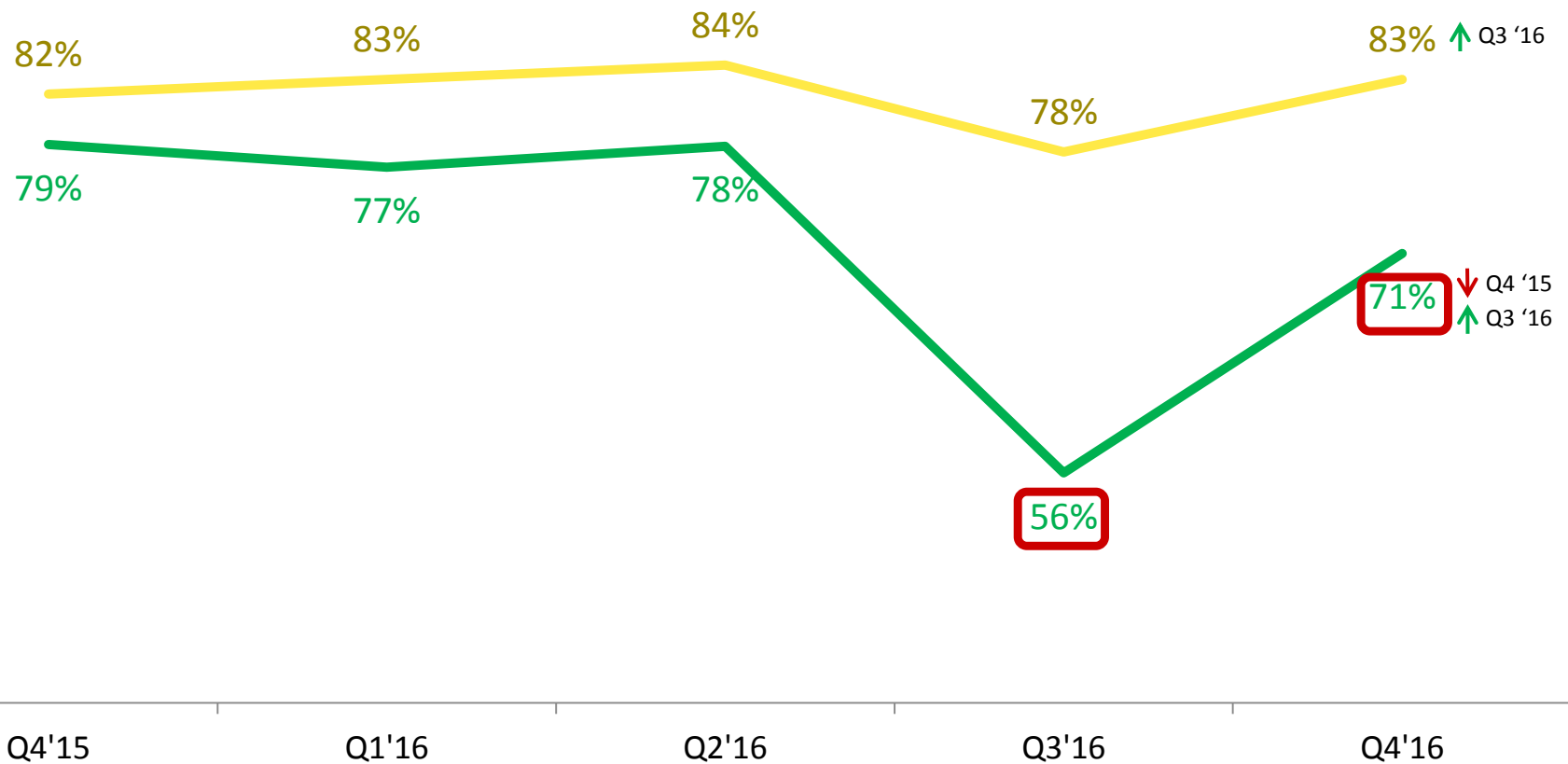
↑ = sig. higher than other subgroups
↓ = sig. lower than other subgroups
↑ = higher or lower than previous wave or year at C.I. = .95
↓ = higher or lower than previous wave or year at C.I. = .95



LINE 2 CUSTOMERS STILL EXPERIENCE A LESS COMFORTABLE RIDE THAN LINE 1, BUT BETTER THAN LAST QUARTER

Comfort of Your Ride (T4B; Q4 2015 – Q4 2016)

Line 1 Line 2



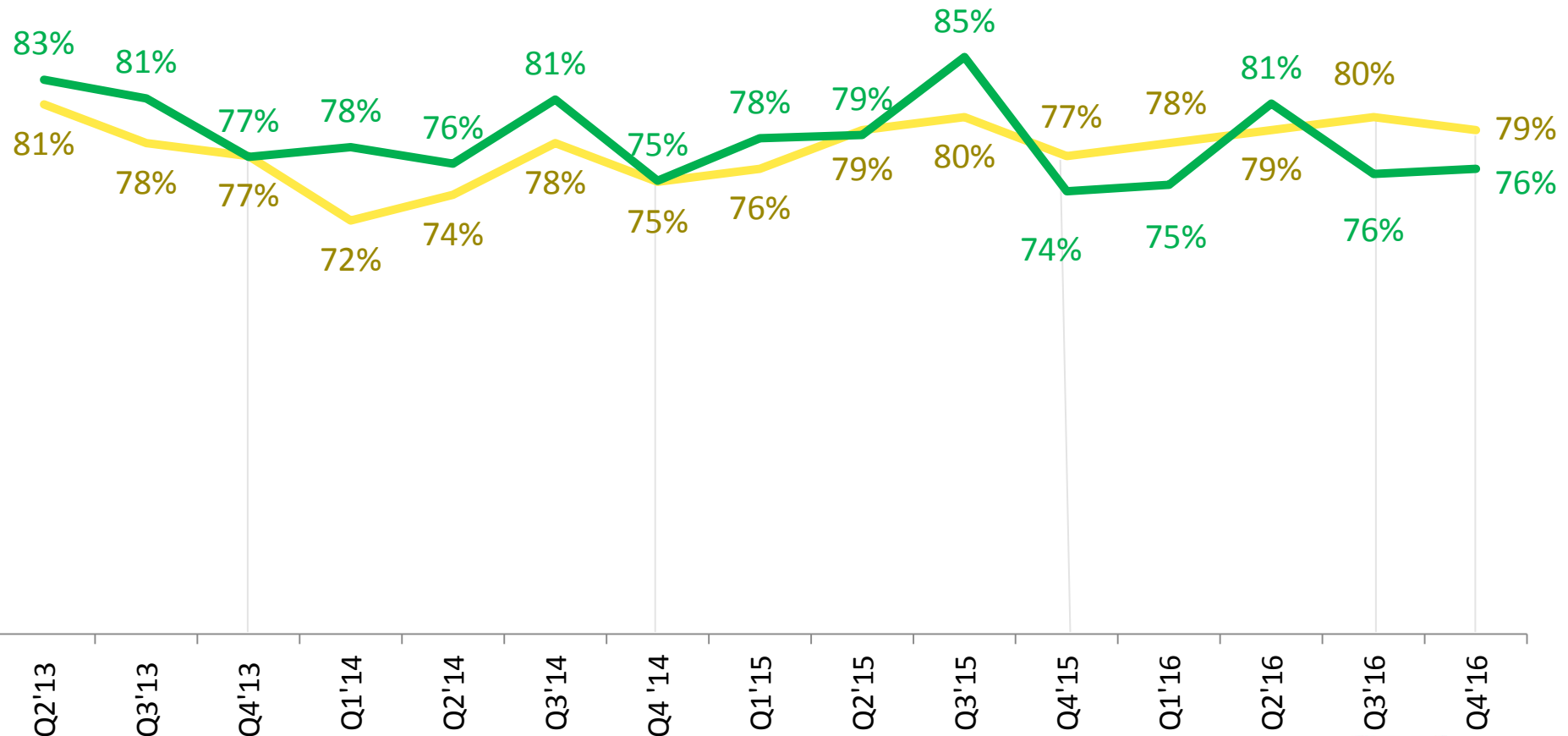
↑ ↓ = sig. higher/lower than other subgroups
↑ ↓ = higher or lower than previous wave or year at C.I. = .95







DIMENSIONS IMPACTING PERCEPTIONS OF SUBWAY SERVICE - QUARTERLY

**Trip Duration
(T4B; Q2 2013 – Q4 2016)**

Line 1 Line 2



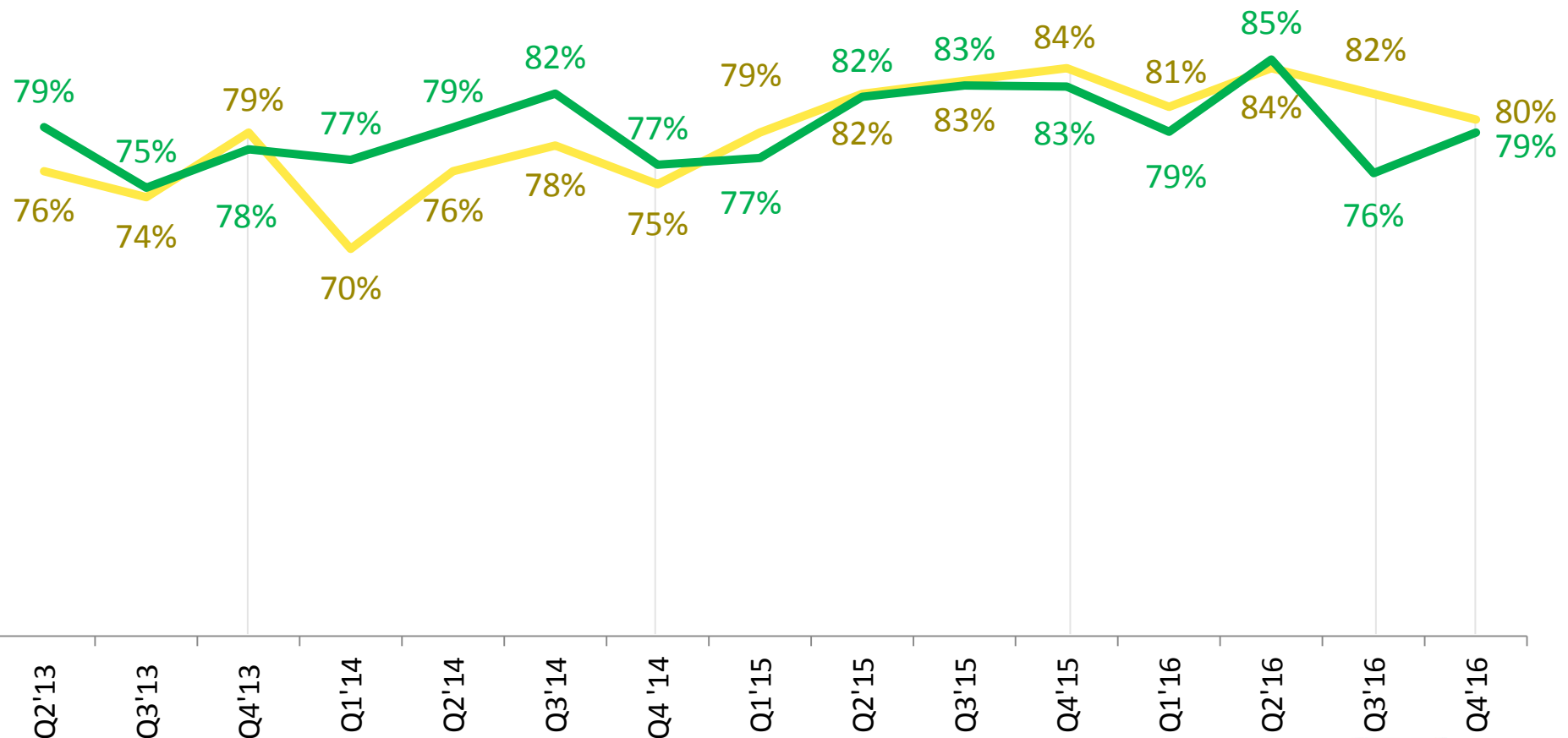
  = sig. higher/lower than other subgroups
  = higher or lower than previous wave or year at C.I. = .95







DIMENSIONS IMPACTING PERCEPTIONS OF SUBWAY SERVICE - QUARTERLY

Wait Time
(T4B; Q2 2013 – Q4 2016)

Line 1 Line 2



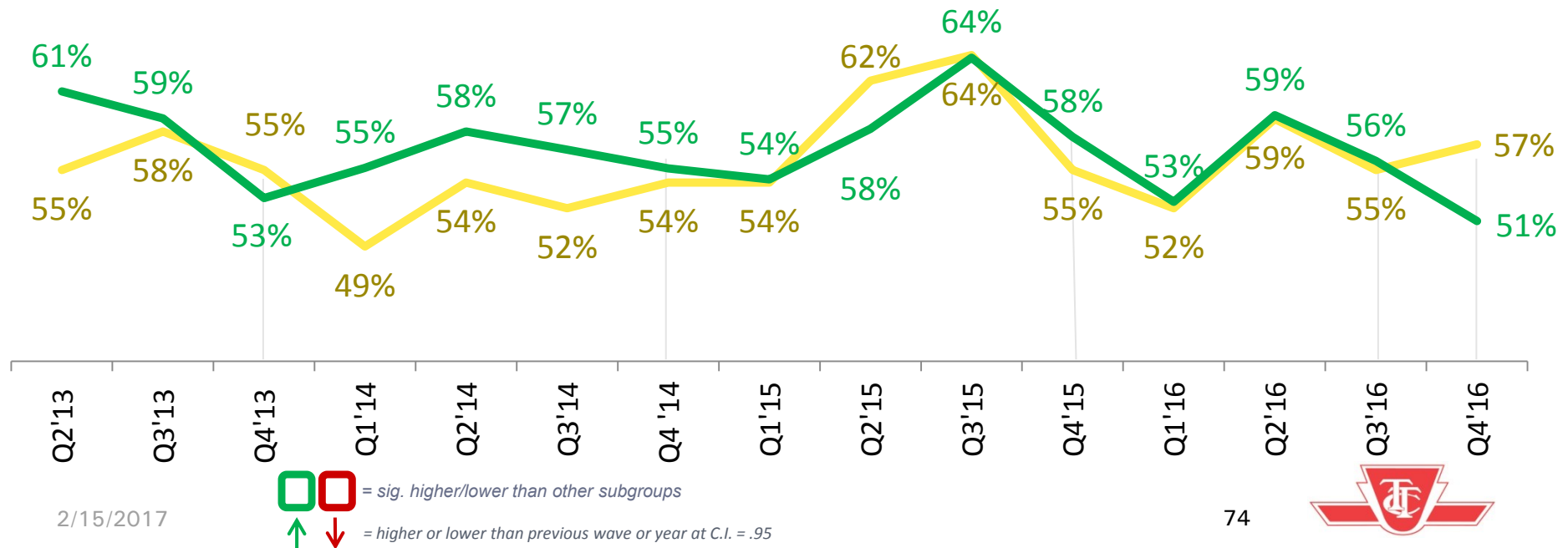
  = sig. higher/lower than other subgroups
  = higher or lower than previous wave or year at C.I. = .95



DIMENSIONS IMPACTING PERCEPTIONS OF SUBWAY SERVICE - QUARTERLY

Level of Crowding
(T4B; Q2 2013 – Q4 2016)

Line 1 Line 2





CONCLUSIONS & IMPLICATIONS



CONCLUSIONS & IMPLICATIONS



1. An update to the key drivers analysis confirmed the factors with the greatest impact on overall satisfaction. Comfort and convenience dimensions (Trip Duration, Comfort of Ride, Wait Time, and Crowding) remain the most impactful drivers of overall satisfaction scores across subway, bus, streetcar. In the coming year, continue to focus on delivering and communicating the best possible experience as it relates to these key dimensions.
2. Pride in the TTC and what it means to Toronto remains consistent, with seven in ten customers being proud. The story differs between mode used, with bus users being more proud (77%) than subway users (70%). This gap increased between the two modes over 2016.

To increase subway customer perceptions of Pride in the TTC and what it means to Toronto, seek to improve the factors identified by the key drivers analysis that have the greatest impact on Pride (e.g. Comfort and Convenience and Staff Service).

3. PRESTO users now equal cash users on the TTC (12% vs 13%). For PRESTO adoption to continue to grow, greater reliability and better communication of PRESTO features and benefits will be required.
4. Perceptions of **fare use** are more positive than perceptions of **fare purchase** suggesting that riders struggle with the current fare purchase environment. The recent Fare Media Customer Experience study identified “a quick and efficient transaction” and “being able to pay the way I want to pay” as the most important factors to customers when purchasing fare media.



CONCLUSIONS & IMPLICATIONS



5. Customer perceptions are driven by the unique experience offered by each mode of transportation:

Subway: Line 2 riders have lower perceptions of Comfort of Ride compared to Line 1 riders.

In 2017, be proactive: make riders aware of any issues ahead of time, suggest alternatives, and share information about improvements.

Streetcar: Customers riding on the new streetcars (509/510/514) report higher overall satisfaction (81% vs. 74%, aggregate 2015-2016) than do riders on other streetcar routes. As well, riders on the new streetcar lines generally express higher satisfaction with Wait Time, Comfort of Ride, Trip Duration, and Crowding over the same period.

As new streetcars continue to deploy, higher levels of satisfaction should be observed on other routes as well.

Bus: Bus riders are less satisfied with Trip Smoothness and Wait Time than are customers on other modes.

Remind operators that they have a direct impact on the perceptions of customers.

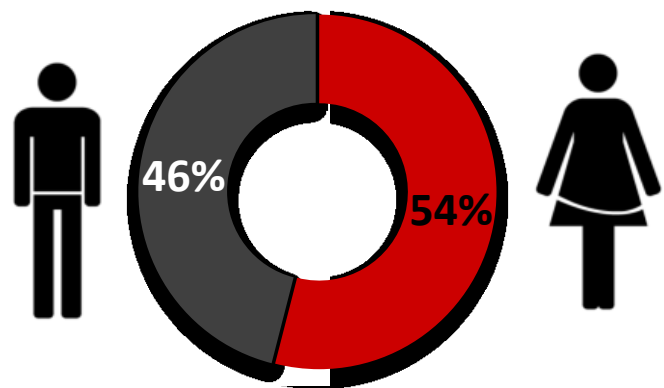




SAMPLE PROFILE

RESPONDENT *DEMOGRAPHIC* PROFILE

Gender

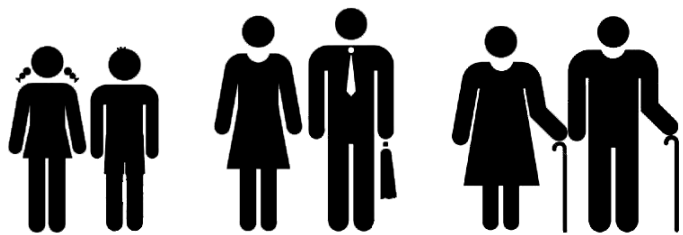


HOUSEHOLD INCOME

21% Under \$45,000
58% \$45,000 +
21% DK/NA



AGE DISTRIBUTION



Age Group	Percentage
<25	20%
25-54	51%
55-70	23%
71+	6%



OCCUPATION STATUS

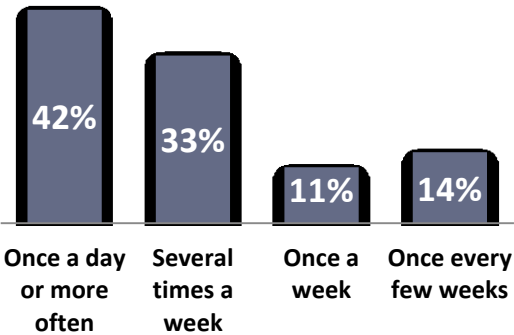
63% Work full-time or part-time
6% Unemployed or at home
16% Student
14% Retired
1% DK/NA



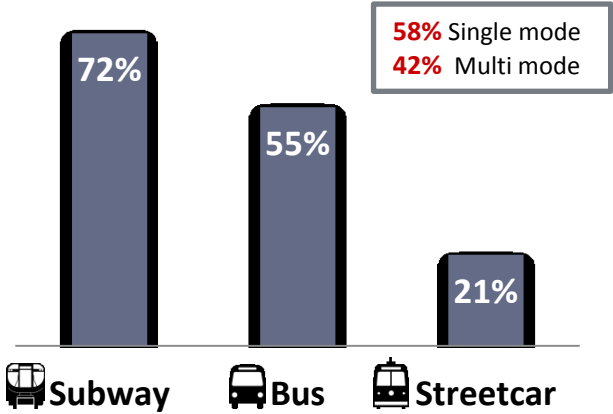
RESPONDENT *BEHAVIOURAL* PROFILE



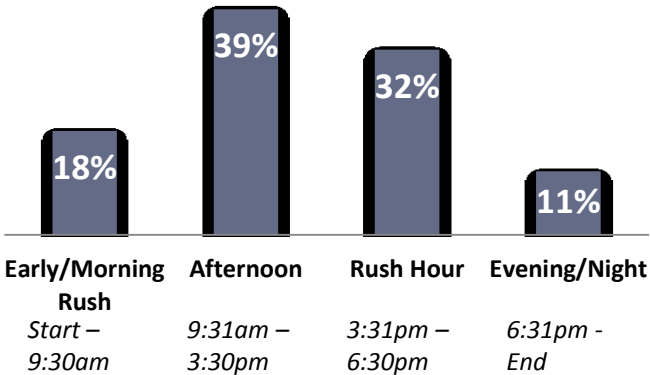
FREQUENCY OF TTC
USAGE



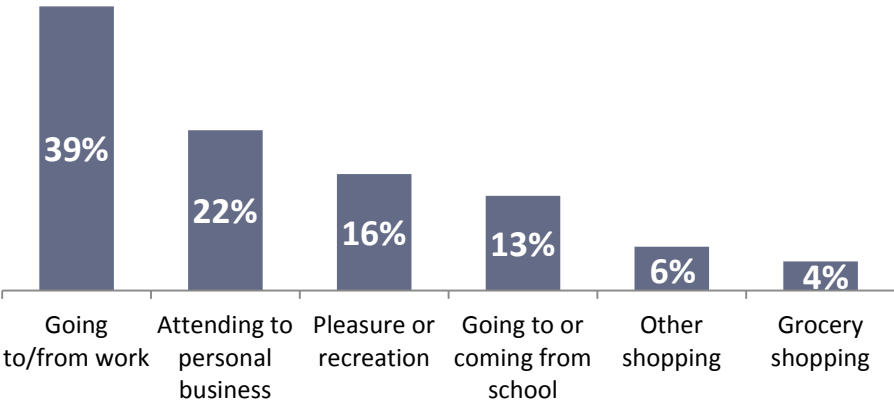
MODE OF TRANSPORTATION OF
MOST RECENT TRIP ON TTC



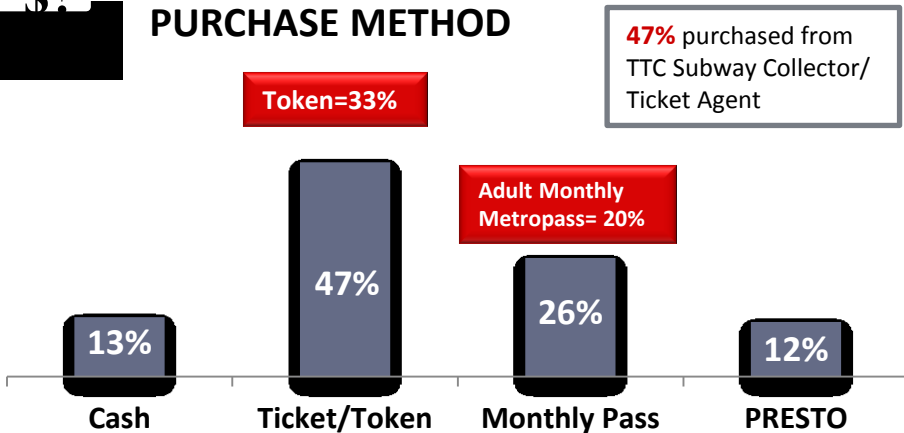
TIME OF DAY OF LAST TRIP



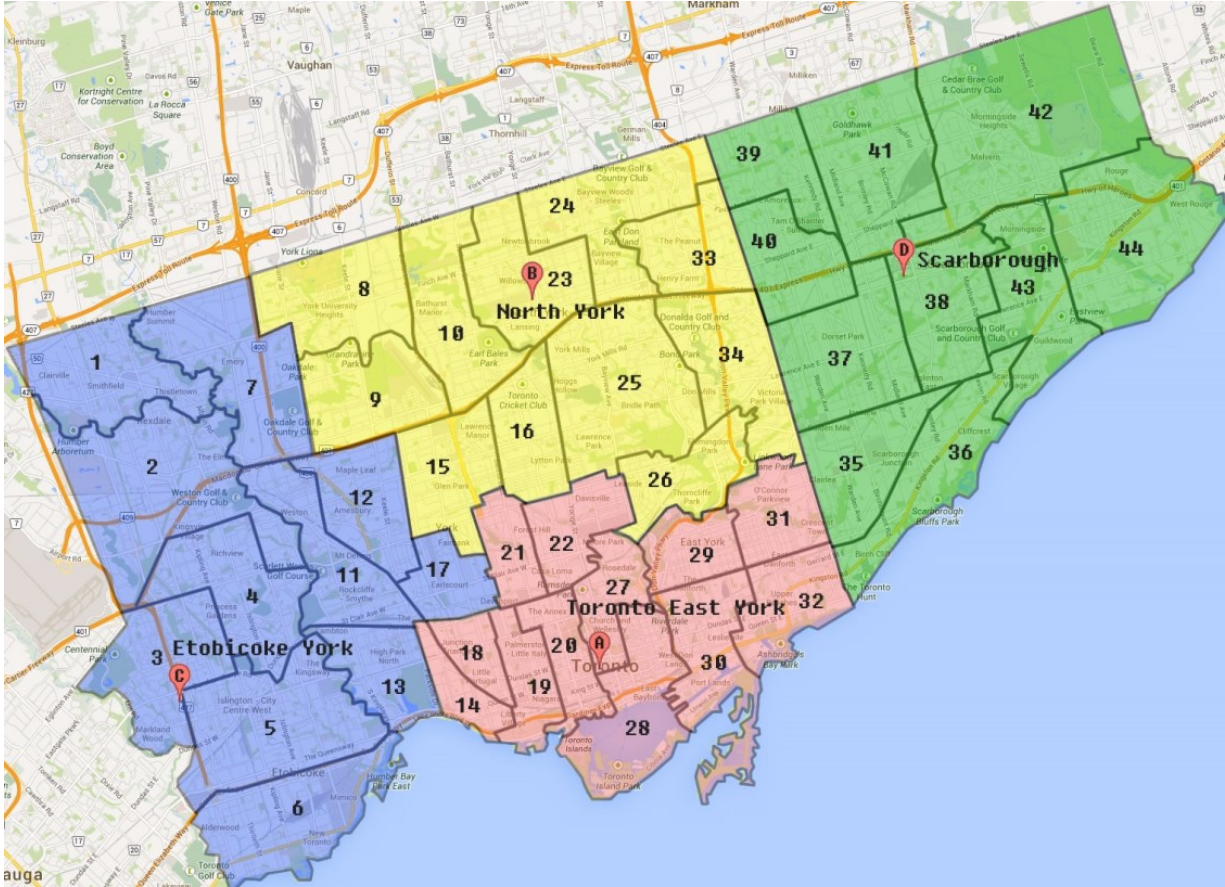
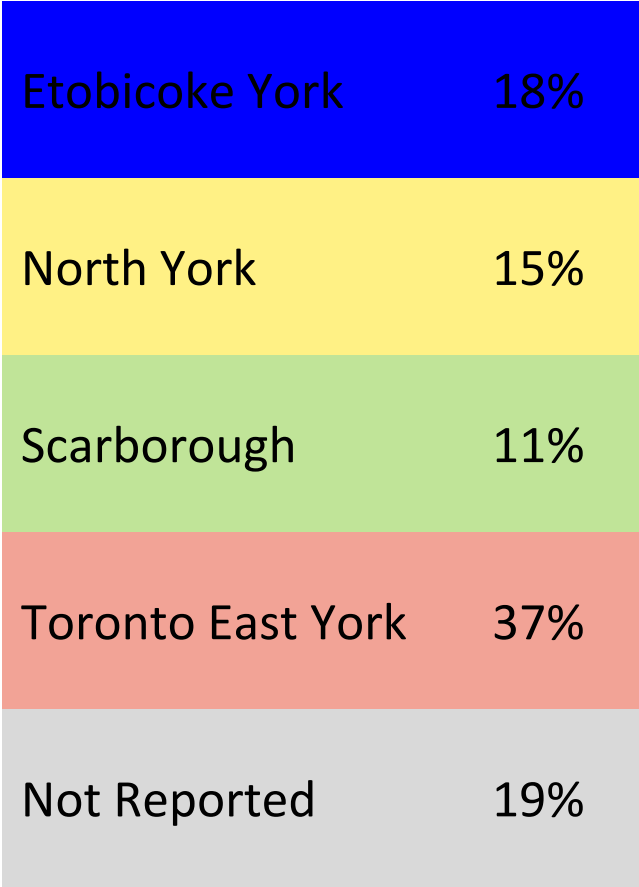
PURPOSE OF LAST TTC TRIP



PURCHASE METHOD



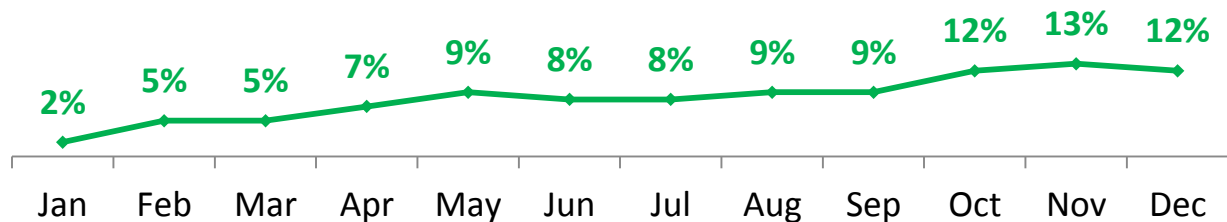
RESPONDENT *GEOGRAPHIC* PROFILE – Q4 '16



%	Landline	Cellphone
Total	79%	21%
Q4'2016	53%	47%



PRESTO USERS



PRESTO usage is higher than last wave. Presto users continue to be a very specific subset of customers.

Fare Type		PRESTO	Metropass	Ticket/Token
Count (n=)		335	999	2044
Age	<25	17%	15%	15%
	25 to 54	67%	61%	49%
	55+	21%	21%	27%
Frequency of Use	Once a day or more often	28%	79%	29%
	Several times a week	40%	18%	40%
	Once a week	13%	2%	13%
	Once every few weeks	18%	2%	17%
Mode Used	Subway	79%	71%	73%
	Bus	28%	64%	55%
	Streetcar	27%	25%	21%
Satisfaction (T4B)	% Satisfied (T4B)	79%	73%	78%
Pride	% Agree (T2B)	64%	74%	72%

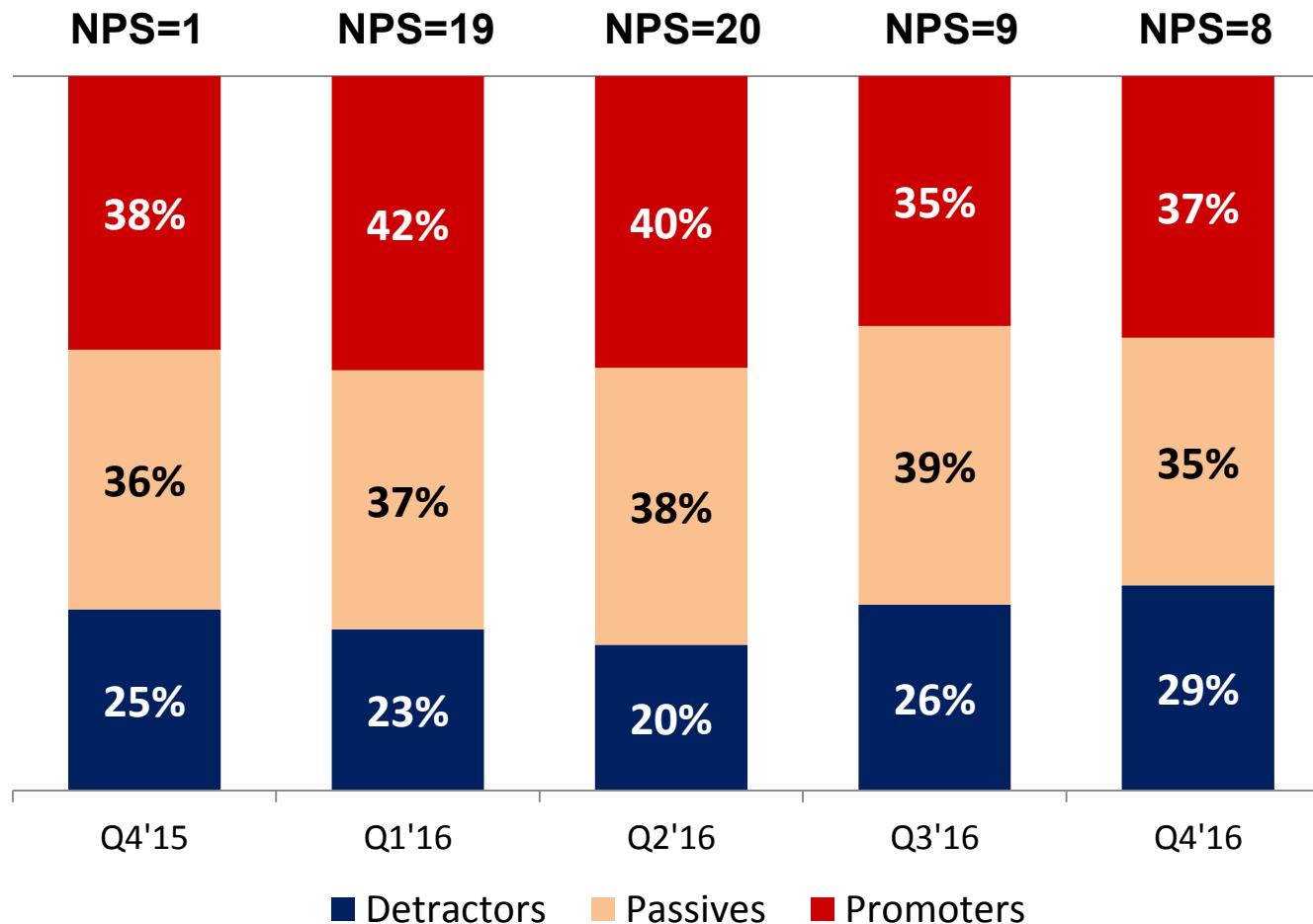
High Satisfaction, but low pride suggests they see the benefits of PRESTO, but do not associate them with the TTC.



APPENDIX



NET PROMOTER SCORE



FACTORS AFFECTING TRIP DURATION AND WAIT TIME MOST MENTIONED AS REASONS TO NOT RECOMMEND THE TTC

Categories:

Top reasons for detracting include:

Delays/
not on time
37%

“You have to wait long time. Not realiable. The fare is expensive compared to other cities.”

“The street cars that run on St.Clair take short turns and we have to wait for buses. It takes a lot of time to reach the destination. ”

Unreliable
service
27%

“It's terrible. The buses are not coming on time and i'm late for everything. The schedule time was at the bus stop so I have to check on the internet and this is inconvenient. Other buses is bad with the timing. ”

“I don't have a lot of confidence in the reliability. ”

Overcrowded
21%

“ttc is very crowded and air conditioning doesnt work in summers. ”

“Because half the time it's crowded, the other half it is delayed. ”

“Temperature inside not comfortable”:

Q3'16: 26%

Q4'16: 4%

System
failures/disrupt
ions/closures
18%

“Very often there are problems on the bloor line and when this happens you have to get off and go upstairs to a shuttle bus. Sometimes the communication when there is service interruption it's not very clear. ”

