

2017 Annual Report

Edmonton Transit Service Customer Satisfaction Tracking Survey

Edmonton



MUSTEL GROUP
MARKET RESEARCH

Executive Overview

Introduction

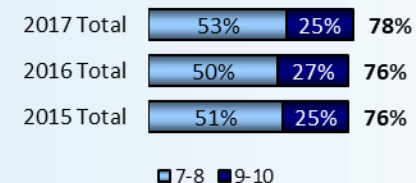
- To monitor customer satisfaction and assess the impact of future changes in service delivery, a new tracking study for the Edmonton Transit Service (ETS) was implemented in October 2014. Initially conducted with **past year** customers, this continuous, random probability telephone survey was re-focused in October 2015 primarily to capture satisfaction among **past 4 week** riders. Accordingly, a total of 1,600 interviews annually (400 per quarter) are completed with past 4 week customers. The research provides an on-going, up-to-date reflection of satisfaction with and perceptions of ETS throughout all seasons of the year.
- Usage frequency among past 4 week riders is defined as:
 - High frequency** **25 or more one-way trips**
 - Low frequency** **1-24 one-way trips**
- Highlights of the findings for the 2017 calendar year are summarized in this *Executive Overview* with more complete, illustrated results in the *Detailed Findings* section of this report. Comparisons are made to both the 2015 and 2016 calendar years.
- Satisfaction overall and for specific attributes is measured on a 10-point scale where 1 means “**not at all** satisfied” and 10 means “**completely** satisfied”.
- For the purpose of this tracking study satisfaction is defined as follows:
 - ‘Satisfied’ = a rating of 7 to 10 on the 10-point scale**
 - ‘Extremely satisfied’ = a rating of 9 or 10**

Key Findings

Overall Satisfaction with ETS

- Satisfaction with Edmonton Transit Service was evaluated on the basis of customers’ experiences in the previous 4 weeks taking into consideration all of their interactions and access before, during or after their trips.
- As in the two previous years, over three-quarters of past 4 week customers are satisfied overall with the Edmonton Transit Service. Results are also stable in terms of the proportion who are ‘extremely satisfied’ (25% rate their overall satisfaction as 9 or 10 out of a possible 10).
- Over the past 12 months satisfaction has been statistically consistent across seasons. Opinions are largely similar by mode type (bus, LRT), geography, demographics and rider frequency.

Overall Satisfaction



- A majority within each customer segment is satisfied, including the larger segments—workplace commuters, families, post-secondary students and special event riders (75-86%). Ratings are highest for secondary students (93%) and lowest for riders with a disability (71%). Seniors aged 65+ express strongest appreciation (40% are extremely satisfied).

➤ Executive Overview (cont.)

Satisfaction with Service Attributes

- Satisfaction was measured on 30 specific attributes covering nine stages of the customer experience.

Customer Experience Stages

Stage 1: Trip Planning

Stage 2: Fare Purchase

Stage 3: Go to Stop/ Station

Stage 4: Wait at Stop/Station

Stage 5: Boarding

Stage 6: In Transit (On Board)

Stage 7: Transfer

Stage 8: Arrival

Stage 9: Post-trip Reflection



- Customer satisfaction continues to be generally favourable, ranging from almost two-thirds to nearly everyone satisfied on various aspects of service delivery and engagement.
 - Highest: 'LRT operator driving smoothly', 94% satisfied
 - Lowest: Overall with Park and Ride Facilities, 63% satisfied
- **Year to Year:** Among the 30 attributes measured, satisfaction levels are largely consistent with the previous years, but two attributes see improvement while four see some weakening.
 - Declines: Although still among the top ratings, 2017 sees a softening in satisfaction for clean and tidy LRT stations, LRT interiors and bus interiors, as well as Park & Ride facilities.

Service Attributes, cont.

- Improvements: Meanwhile, gradual improvement is seen for bus on-time reliability, as well as a recovery for LRT on-time reliability following a decline in 2016.
- **Top rated attributes** see the highest satisfaction levels with 80% or more customers satisfied in total and with 40-62% extremely satisfied.
 - Top attributes: **vehicle operator** attributes—skill driving (LRT and bus), attention to safety and customer service.
 - Other top attributes include: **time** factors (LRT reliability, LRT frequency, convenient bus stops), **safety** (onboard bus & LRT), **cleanliness** (LRT station & interior) and easy to use **trip planning** information.
- Seven variables fall into the lowest tier of attributes with total satisfied levels falling in the 63-69% range, including:
 - Time related factors (connections, bus frequency)
 - Comfort (overcrowding and enough bus shelters)
 - Convenience (Park & Ride facilities)
 - How ETS communicates also could be improved.
- **Seasonally:** Findings tended to be largely stable across seasonal quarters. While there were some fluctuations between quarters, there are no sustaining trends in the past year, indicating general stability.

➤ Executive Overview (cont.)

Critical Moments of Truth



- When designing this customer satisfaction tracking program, qualitative research was conducted with customers and operators to create a map of the customer experience and identify Critical Moments of Truth, or moments that have greatest potential to trigger strong positive or negative feelings about the customer experience. These moments were incorporated and aligned with selected service attributes in the tracking study. Three key factors emerged from the Customer Experience Mapping exercise: Access to information, Time and Security.
- The customer satisfaction tracking indicates that ETS continues to do a good job addressing these key factors—in particular, **safety and security** (operators driving safely, professionally and smoothly when starting and stopping, personal safety onboard bus and LRT and while waiting), **time-related factors** (LRT frequency and on-time/reliable service) and **access to information** (helpful/ considerate bus operators and ease of trip planning).

Key Drivers of Customer Satisfaction

- Key drivers are attributes that have greater potential to influence overall satisfaction. To reveal areas of success and opportunity for ETS, key drivers analysis was used to create Priority Charts, plotting customer satisfaction and importance for the 30 service attributes. Importance is derived from the extent to which each attribute rating is statistically correlated with overall satisfaction.

Key Drivers of Customer Satisfaction, cont.

- **Success:** No service attributes where ETS finds success stand out with a strong influence on overall satisfaction. A number of highly regarded attributes are of moderate importance with the following slightly above average in importance to customers:
 - **Bus onboard safety**
 - **LRT frequency**
 - **Safe, professional bus driving**
- **Opportunity:** Overall satisfaction can be improved the most by attributes that are highly important to customers but where performance is relatively weaker. These are the most influential:
 - **Good connections** (the most important this year)
 - **Bus frequency** (2nd most important)
 - **Trip duration** (equally 2nd most important)
 - **Value for fare**
 - **Bus on-time reliability**
 - **ETS communications**

Another possible opportunity is for

 - **Hours of operation** (relatively important with a moderate satisfaction score)
- Some changes that ETS has implemented in 2016 and 2017 may take time to assist in strengthening these attributes over time.

➤ Executive Overview (cont.)

Loyalty

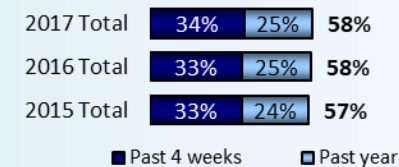
- **Likelihood to recommend ETS** to a friend or colleague (assuming routes are suitable for them) serves as a measure of satisfaction and loyalty. This measure is highly correlated with overall service satisfaction, as it is an outcome of overall experiences and perceptions about ETS. Attributes most strongly correlated with a positive likelihood to recommend are: value for fare (the most important), trip duration and good connections—all are among the key opportunities identified for increasing customer satisfaction.
- The likelihood to recommend measure identifies customers who are highly likely to recommend ETS—that is, ETS Promoters; those least likely to recommend ETS are Detractors and those in between are called Passives. The proportion of promoters and passives are about equal (43% and 42% respectively), while 16% are detractors. Detractors are most unhappy with ETS value for fare, bus frequency, connections, bus on-time reliability, communications and not enough shelters.

Motivators

- Consistent with the past two years, the most common reason for choosing transit over other modes of transportation is affordable cost, but also not having to worry about parking or driving and that no other option is available.
- Routes and schedules continue to be the most widely requested single change to ETS—e.g., more buses/improved frequency, improved schedule reliability and expanded LRT/ bus routes and off-peak service.

Current Usage

- **Incidence in population:** Nearly 6-in-10 Edmonton residents aged 15+ travelled on ETS in the past year (58%) with 34% riding in the past 4 weeks. Results are stable since 2015.



- **Frequency among past 4 week customers:** This year sees more high frequency riders (37% vs 33% in 2015). The total average trip rate is statistically unchanged, but a gradual upward trend may be emerging (20.5 this year vs. 19.2 in 2015). Significantly more trips were found among middle aged, secondary students and families segments.



- Average = 20.5 one-way trips per past 4 week customer
 - Low frequency rider: 6.9 trips vs. High frequency rider: 44.0 trips
 - Combined use of bus and LRT in the same trip increased since 2015 (32% of past 4 week trip volume vs. 28% in 2015).
- **Perceived change in usage:** Similar to 2015 and 2016, past four week riders tend to think their transit use is about the same as one year ago (58%). The remainder are evenly divided between using transit less regularly and using it more often (20-21% each).
- **Services used in past year:** The incidence of using LRT and bus in the past year remains about equal (87% and 84%, respectively).

➤ Executive Overview (cont.)

Current Usage, cont.

■ Services used in past year

- Two-thirds of past 4 week customers sought route information (67%, a return to the 2015 level after a drop last year). **ETS' online trip planner** is the primary source (stable at 59%), followed by Google Maps (growing and now 50%). Poster/info at the stop/station is also up this year (32%).
- Park and Ride is used by 25% of past 4 week customers.

■ Trip characteristics among past 4 week riders

- The most popular trip purposes are social/ recreational (65%), personal business (61%), and special events (61%). This is followed by work commuting (53%) and shopping (40%), then post secondary school (24%) and grade school (10%).
- The 'most frequent' trip is reported to be in the weekday p.m. peak (62%), followed by the a.m. peak and midday (51% and 45%, respectively).
- Payment methods among past 4 week customers are split about equally between tickets (29%) and monthly passes (28%), compared with cash used by 22%.
- Most past 4 week riders walk to their stop (80%), averaging just over six and a half minutes to arrive at the system start point (at a bus stop 61% vs. 38% at LRT/transit centre). About one in five uses a car to the start point (19%). Just under 6-in-10 make a transfer with most making just one transfer.
- Aside from a smaller proportion paying with cash, results are in line with 2016.

Past 4 Week Customer Profiles

■ Demographic differences between past 4 week ETS riders and all Edmonton residents in this year's survey:

- Younger (31% are 15-24 years old vs. 17% in population)
- Fewer seniors 65+ (8% vs. 14% of population)
- More enrolled students (28% vs. 15% of population)
- More transit users aged 15+ in the household (average of 2.1 vs. 1.3 in general population)

■ Disabilities among ETS past 4 week riders: This year 6% of riders surveyed self-identified as having a disability that would limit their ability to take conventional transit. Of these, 18% said they use DATS, meaning that the large majority of disabled riders use the conventional ETS service.

■ Vehicle access among ETS past 4 week riders: The large majority (72%) of riders own or have access at home to a vehicle that could be used for trips made by transit. About three-in-ten are captive riders (28%).

➤ Executive Overview — Key Takeaways

Customer Satisfaction

1. **Overall satisfaction:** General stability versus past years and across seasons, by mode type, geography, demographics and rider frequency.
2. **Satisfaction across specific attributes:** Continued general stability, ranging from almost two-thirds to nearly everyone satisfied with service delivery and engagement attributes measured. Extremely satisfied levels reach 40% to 62% for the most well-regarded/top tier attributes.
3. **Improvements:** Gradual improvement for bus on-time reliability (65% in 2015 to 70% currently) and recovery for LRT on-time reliability (88% in 2015, down to 82% in 2016 but now back to 87%).
4. **Weakening:** Statistical weakening seen for clean and tidy LRT stations (89% in 2015 to 86% currently), LRT interiors (89% in 2015 to 85% in 2017), bus interiors (79% in 2015 to 75% currently), and Park & Ride facilities trending down (72% in 2015 to 63% this year).

Key Drivers of Satisfaction

1. **Success:** While no service attributes where ETS achieves some success exert strong influence on overall satisfaction, the following have slightly above average importance: **Bus onboard safety, LRT frequency, Safe, professional bus driving and Trip planning ease.** Maintaining these successes may help improve overall satisfaction.
2. **Opportunity:** Overall satisfaction can be improved the most by attributes that are highly important to customers but where performance is relatively weaker. These are the most influential:
 - **Good connections** (the most important this year)
 - **Bus frequency** (2nd most important)
 - **Trip duration** (equally 2nd most important)
 - **Value for fare**
 - **Bus on-time reliability**
 - **ETS communications**

Key Drivers, continued

3. **Loyalty:** Most correlated with loyalty (likelihood to recommend) are: **value for fare paid** - the most important, but also trip duration and good connections are key drivers.

ETS Usage Monitoring

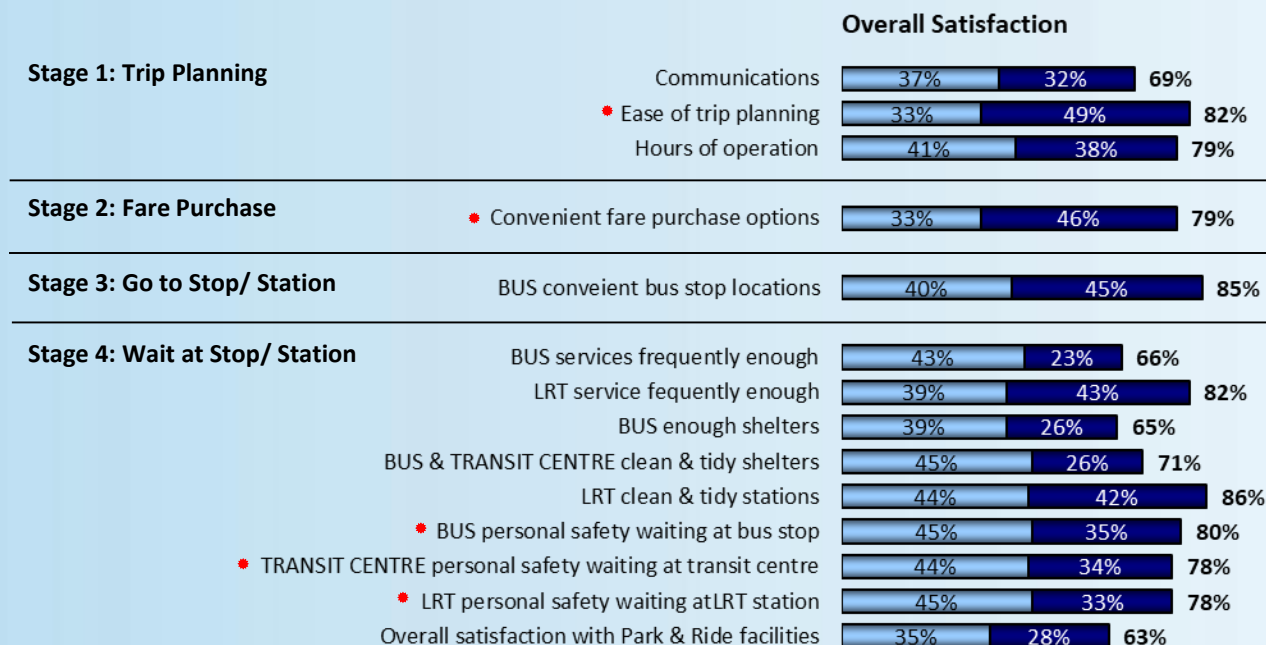
1. **Ridership incidence stable** for past year and past 3-year
2. **Trip rate** improvements among past 4-week customers:
 - Past 4-week ratio of high frequency to low frequency ridership up significantly (37% now high frequency riders compared to 33% in 2015).
 - Average trip rate in past 4 weeks up directionally from 19.2 trips in 2015 to 20.5 in 2017.
 - Significantly higher trip rates among middle-aged, secondary students and families segment.
3. **ETS services** use improvements/changes:
 - Combined use of LRT + Bus on same trip higher this year (6.5 average trips) than in 2015 (3.6 trips).
 - Increase from 2016 in use of both Google Maps (39%, up to 50% this year) and posters/info stop or station (28% in 2016 and now at 32%).

Trip Characteristics Monitoring

1. **Tracking:** A lot of consistency with past years
2. **Payment method:** Fewer using cash to pay for their most frequent trip, from 27% in 2016 to 22% this year.

➤ Satisfaction with Specific Service Attributes — Detail

ETS performance across the customer experience stages is summarized in the following charts.



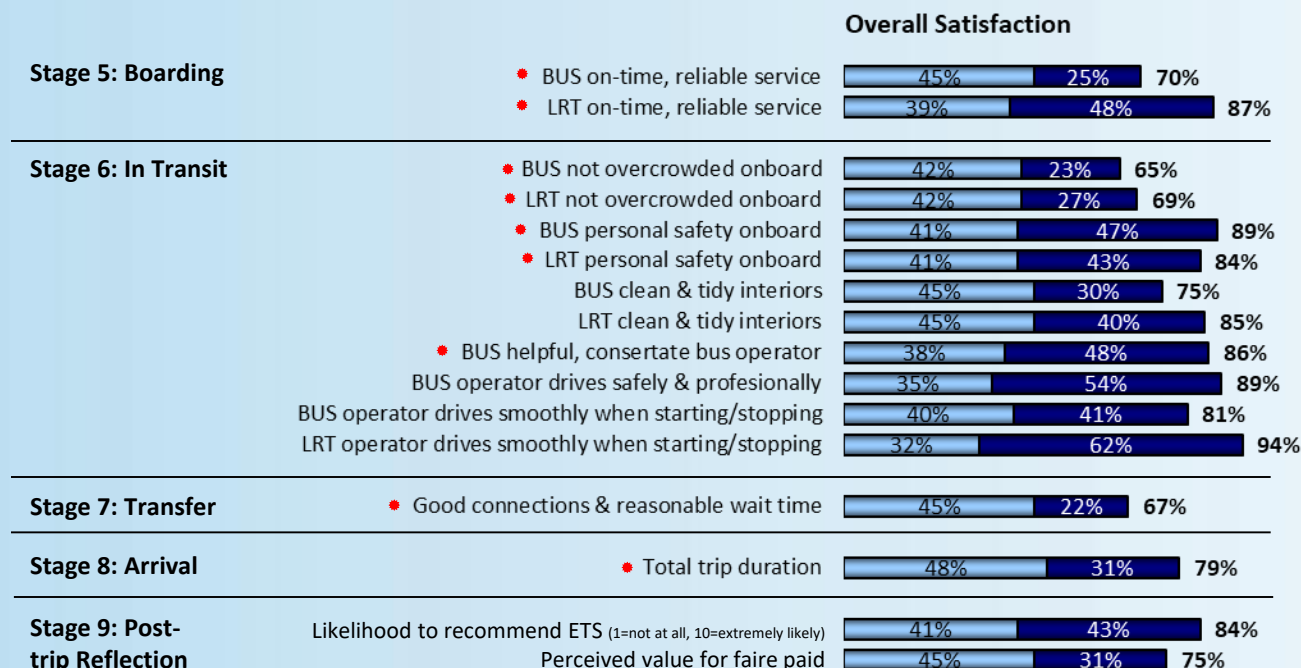
* indicates Critical Moment of Truth

% Satisfied =
Rating 7-10 out of 10

% Extremely satisfied =
Rating 9-10

□ 7-8 ■ 9-10

➤ Satisfaction with Specific Service Attributes — Detail (cont.)



* indicates Critical Moment of Truth

% Satisfied =
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□ 7-8 ■ 9-10



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Foreword & Methodology

➤ Foreword

Background

- Edmonton Transit Service (ETS), the City of Edmonton's public transit service, has undertaken a revitalized customer satisfaction research program to monitor and identify areas for improving service delivery to existing customers and to be prepared for growing demand and new ridership in the future. Informed by an initial, in-depth customer mapping research phase*, the tracking study design incorporates measurement of the 'critical moments of truth', as well as a series of other aspects integral to ETS' service delivery.
- A continuous tracking survey, being conducted year-round, collects customer perceptions and usage information. Concurrently, the survey is developing a panel of customers to take part in future research, some of whom participated in a Voice of Customer (VOC) pilot study (reported separately).

Research Objectives

- This new research program has been designed to identify customer needs and expectations on a regular, ongoing basis and provide actionable insights for implementation of service, fare and other customer enhancement strategies in a timely, effective and efficient manner.

- Specific research objectives are as follows:

- Measure ETS service satisfaction overall and for key customer experience touchpoints
- Provide satisfaction evaluations by ETS modes (and annually by market segments and user types)
- Provide detailed insights into reasons for customer dissatisfaction
- Profile customers demographically
- Assess customer loyalty and factors affecting loyalty
- Assess use and frequency of transit services and fare products used
- Determine issues of importance to customers
- Determine customers' overall service provision priorities
- Conduct trend analysis over time

- The survey addresses all aspects of the customer experience, pre-trip, in-trip and post-trip satisfaction, perceived value and future use. As well, the survey enables flexibility to add questions as needed to address topics of interest and emerging issues.
- Findings are presented for the calendar year 2017 in comparison to calendar year 2015.

* Refer to "ETS Customer Experience Mapping & Critical Moments of Truth Research" report (July 2014)

➤ Methodology

- A continuous, random probability telephone sampling method was implemented with Edmonton residents aged 15 years and older to ensure accurate, valid and reliable results projectable to the population.
- Samples were drawn monthly from the sampling frame consisting of both landlines and cell phones, in order to maximize coverage and include harder-to-reach populations such as youth, cell-only households and users of the transit system.
- The tracking questionnaire was developed in collaboration with ETS following review of the Customer Experience Mapping focus group results conducted with transit system users and operators.
- At the interview stage, respondents in households with ETS employees were screened out to remove employment bias. Further steps to address for non-response bias are as follows:
 - random selection of age/gender within the household,
 - minimum of 6 and up to 10 attempts to reach the selected household or individual.
- Finally, a question was asked to identify ETS customers (defined as past 4 week users of ETS) in this research.
- In 2017, a total of 4,980 screener interviews were conducted resulting in 1,608 surveys with past 4 week users of the ETS system.
- Surveys were conducted throughout each month of each quarter with the monthly samples weighted on age within gender and geographic quadrants according to census statistics for the City of Edmonton. This method enables trending analysis using a 'rolling quarter' aggregation of 3-month samples (for the monthly Dashboard reports).
- Margins of Error
 - On a quarterly basis the margin of error on a random sample of 400 customers is ± 4.9 percentage points at the 95% level of confidence and ranging from ± 5.2 to 5.7 among LRT and bus rider samples (approximately 300 to 350 interviews each).
 - For the total 2017 year sample, the margin of error on 1,608 interviews is ± 2.5 percentage points.
 - The margin of error is ± 3.8 percentage points when comparing 2016 results to the 2015 base of 1,099 interviews with past 4 week riders.
- Dates of interviewing for 2017, excluding holidays, were:
 - Q1: January 2 – March 27
 - Q2: April 1 – June 30
 - Q3: July 4 – September 28
 - Q4: October 5 – December 22
- A copy of the questionnaire is appended; detailed data tabulations have been provided separately. NOTE: In Q4 2017 Ad Hoc questions were included (see Appendices).