

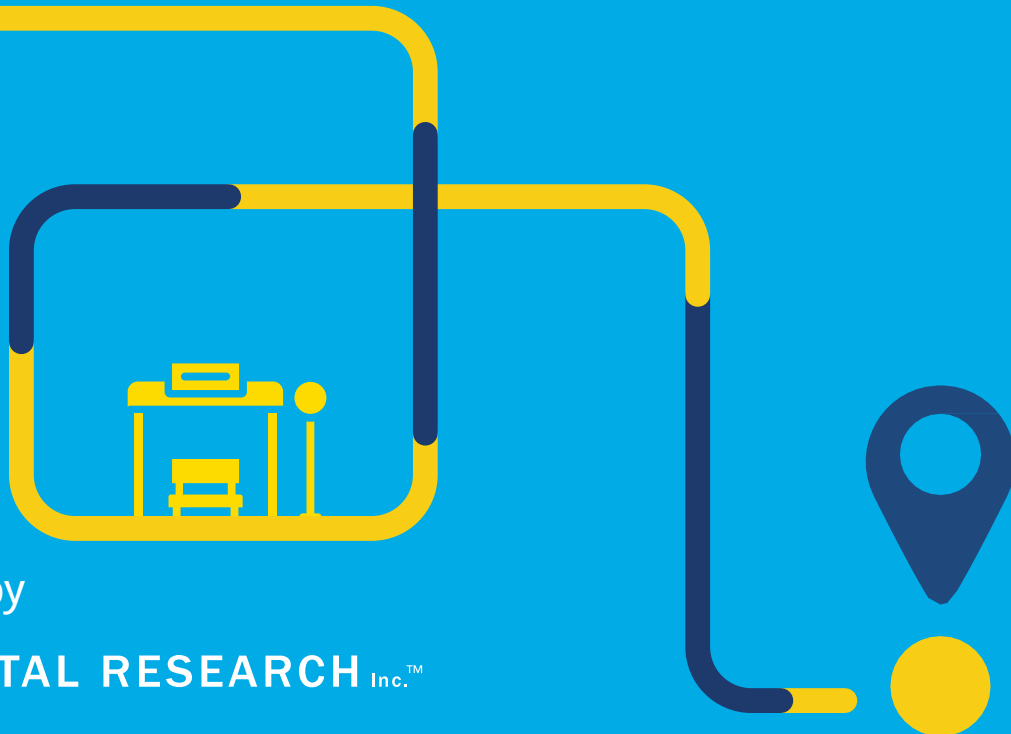


Edmonton
Transit
Service

Edmonton

Executive Summary

2024 Rider Research Program



Prepared by

 PIVOTAL RESEARCH Inc.™



CANADIAN RESEARCH
INSIGHTS COUNCIL
LE CONSEIL DE RECHERCHE
ET D'INTELLIGENCE
MARKETING CANADIEN



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TABLE OF CONTENTS

Background	Page 3
Objectives of The Research Program	Page 4
Data Collection Methodology	Page 5
Conventional Riders	Page 6
Dedicated Accessible Transit Service (DATS)	Page 14
Non-Riders	Page 18
Appendix A: Demographics	Page 21

Background

Edmonton Transit Service (ETS) plays a crucial role in the daily lives of Edmonton residents, providing accessible and reliable public transit options across the city. The **ETS Rider Research Program** was established to help ETS understand the evolving needs of its riders and non-riders as part of its commitment to continuous improvement.

This program involves the systematic collection and analysis of feedback from transit riders, offering valuable insights into their experiences and identifying areas for service enhancement. The program combines both quantitative and qualitative research to capture a comprehensive view of rider satisfaction and overall transit experience.

In addition to surveying current users of conventional transit services (buses, LRT, and On Demand Transit), ETS also conducts research with non-riders and riders of the Dedicated Accessible Transit Service (DATS). This holistic approach ensures that ETS can address the diverse needs of the entire community, from regular commuters to those with specialized transit requirements. ETS commissioned Pivotal Research Inc., an independent third-party organization, to conduct the research.

The findings from the research program inform strategic decisions that support a thriving, accessible public transit system and help ETS enhance its services, improve rider satisfaction, and ultimately, make public transit a more attractive option for all Edmontonians.



Objectives of the Research Program



Ridership Profile: Understand the demographic makeup of ETS ridership, including factors that may create different experiences or needs based on gender, race, ethnicity, age, ability, and other intersecting identities.



Ridership Trends: Explore ridership trends such as travel times, travel purpose, travel frequencies, and motivations for using ETS.



Overall Satisfaction with ETS: Evaluate overall satisfaction with ETS services, as well as satisfaction with each stage of the transit journey (pre-trip, on-trip and post-trip), among riders of both conventional transit and DATS.



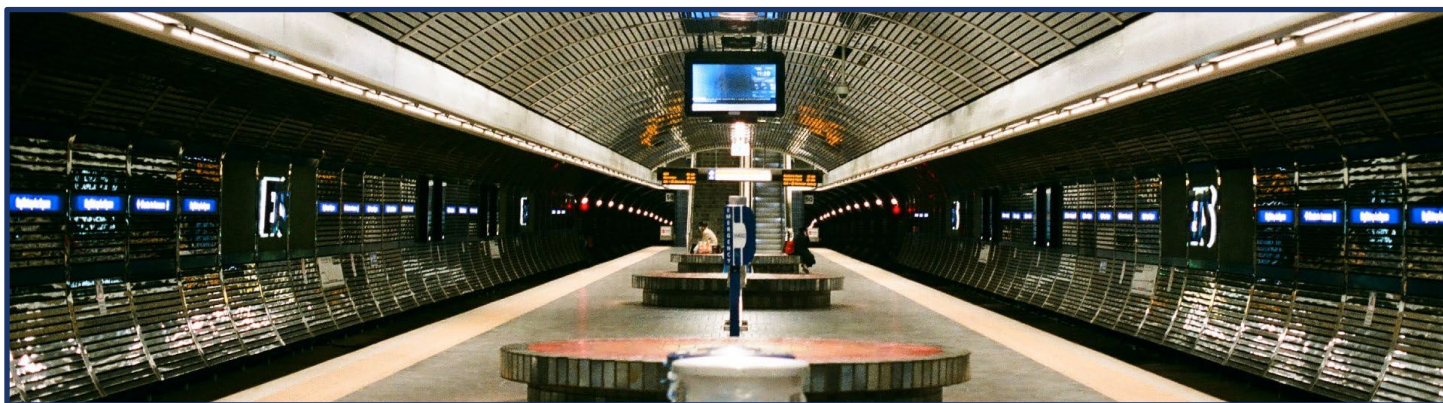
Rider Loyalty: Gauge factors affecting customer loyalty and determine issues of importance to riders and overall service provision priorities.



Non-Rider Perceptions: Determine reasons that resulted in loss of ridership and ways to encourage the return of current ETS non-riders.



Real-time Insights: Examine in-the-moment experiences of transit riders pertaining to specific transit aspects.



Data Collection Methodology

Conventional Riders



n=250 riders/month (**3000** responses yearly)

Monthly data collection through online panel surveys

Two qualitative research studies involving **55 participants** in total

- **Monthly Surveys:** Feedback was collected monthly from riders of ETS's conventional transit services, including buses, Light Rail Transit (LRT), and On Demand Transit. The survey targeted residents of the Edmonton area who used ETS services in the three months prior to completing the survey.
- **Deep-Dive Qualitative Research:** In addition to the monthly surveys, ETS conducted two qualitative research studies involving youth and regional transit riders to gain a deeper understanding of their experiences.

DATS Riders



n=250 DATS riders/year

Annual data collection online and via telephone

- **Annual Survey with DATS (Dedicated Accessible Transit Service):** Research was conducted with riders of DATS, ETS's transit service for individuals who cannot use regular transit because of a physical and/or cognitive disability.

Non-Riders



n=400 non-riders/year

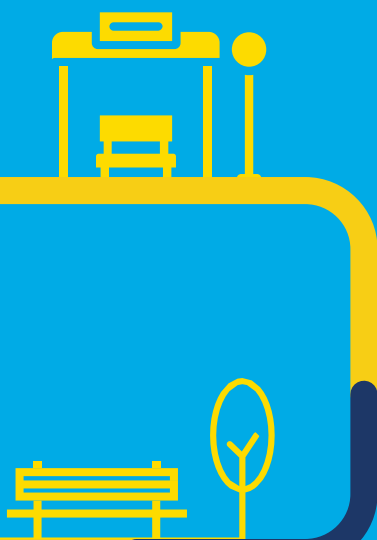
Annual data collection through online panel surveys

- **Survey with Non-Riders:** ETS also conducted an annual survey with those who have not used transit or have used transit very infrequently in the past year prior to completing the survey to understand why some chose not to access the service and to identify ways to encourage future usage.





Conventional Riders



Conventional Riders Monthly Survey

In 2024, 3,000 surveys were completed. Monthly, quarterly and annual quotas are calibrated to ensure that the final sample of respondents and corresponding demographics is inclusive of the various demographics within the Edmonton area. Data was collected using an online panel* to understand riders':

- Usage and perceptions of ETS
- Satisfaction with ETS on various aspects along the transit journey including: first stop, on-board and transfer experience as well as fare, trip duration, reliability, and safety and security
- Overall transit experience, value for money, and likelihood to recommend ETS
- Demographics

*Satisfaction metrics shown throughout this section are based on a “**Top 3-Box**” calculation which refers to the sum of percentage of respondents who chose one of the top three options (e.g., the highest three ratings) on a seven-point satisfaction scale.*

Conventional Rider Trip Characteristics

- In 2024, the top reasons riders continue to rely on ETS remain the elimination of parking costs (23%) and that ETS is their only means of transportation (22%).
- The majority of riders continue to walk (70%) to their first stop or station before boarding ETS.
- A quarter of riders (25%) indicated that the main purpose of their most recent ETS trip was commuting to or from work.

Key Satisfaction Metrics



Overall Transit Experience : **73%** (73% in 2023)

On a scale of 1-7, where 1 is extremely dissatisfied and 7 is extremely satisfied, how satisfied are you with your overall transit experience?



Satisfaction With Value For Money: **66%** (67% in 2023)

On a scale of 1-7, where 1 is extremely dissatisfied and 7 is extremely satisfied, how satisfied are you with the value for money received from your fare?

*Transit riders aged 15+ residing in Edmonton CMA were randomly selected from an online panel of pre-recruited individuals who have agreed to participate in surveys. As this is a non-probability sampling methodology, a margin of error cannot be reported. For comparison purposes, a probability sample of this size has an estimated margin of error (which measures sampling variability) of +/- 1.8%, 19 times out of 20.

Statistical testing was performed to identify whether the observed differences in scores are statistically significant and are not due to random variation within the samples. Scores marked with a double asterisk () are significantly lower than 2023 scores.



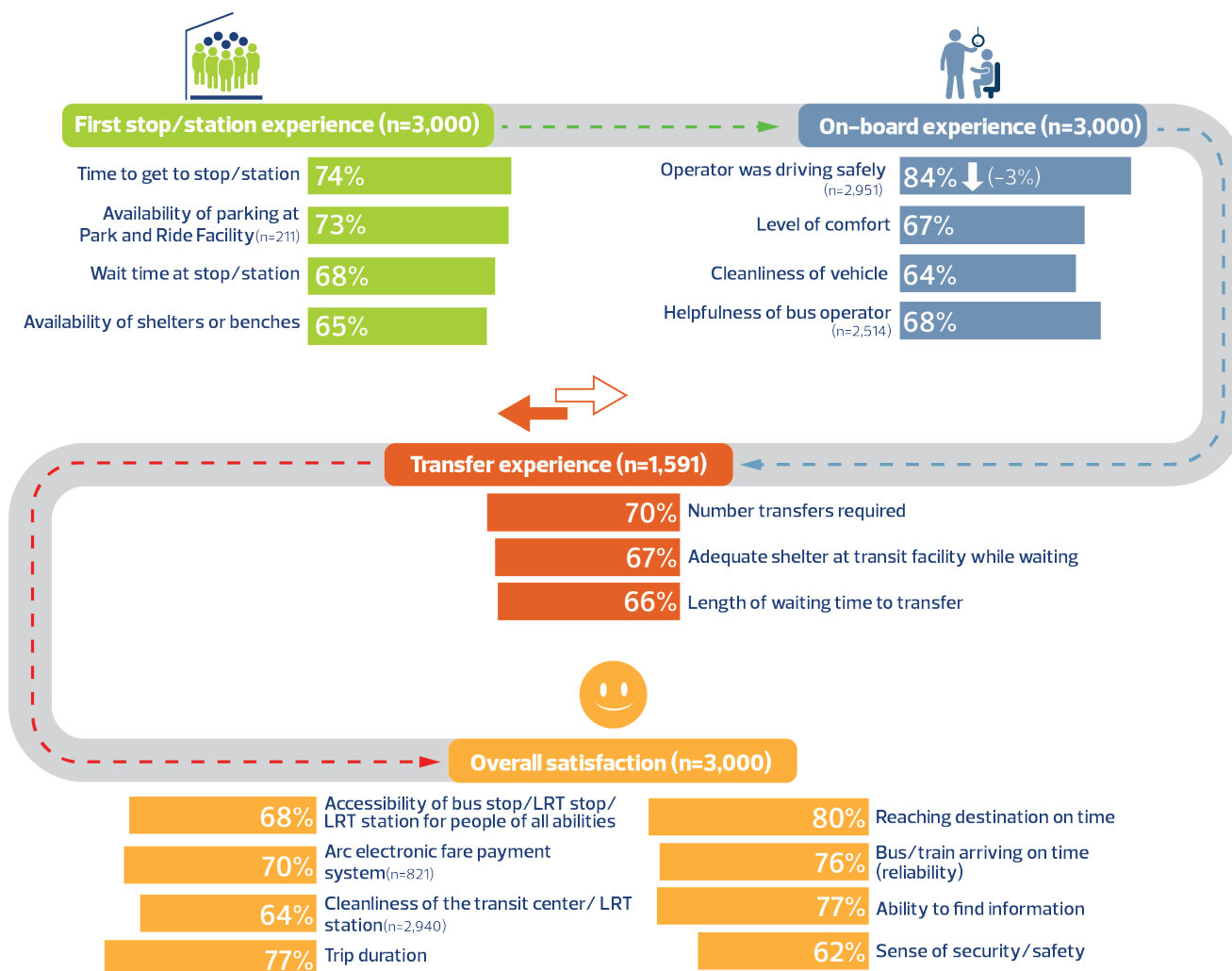
Satisfaction Along the Transit Journey

This infographic summarizes riders' satisfaction scores in 2024 along the transit journey where respondents were asked: "On a scale of 1 to 7, where 1 is extremely dissatisfied and 7 is extremely satisfied, how satisfied are you with ETS" along various aspects of the journey.

An upward or downward arrow is shown when the difference from 2023 is statistically significant, along with the corresponding percentage point increase or decrease in brackets. If no arrow appears, the difference from 2023 is not statistically significant.*

In 2024, riders were least satisfied with the sense of safety (62%) and equally (64%) with cleanliness of the vehicle and transit center/LRT station, while they were more most satisfied with the safe driving of operators (84%) and reaching their destinations on time (80%).

Overall, rider satisfaction in 2024 was consistent with 2023 across nearly all aspects of the transit journey, as shown in the chart below.



Overall Satisfaction with ETS Among Various Groups

The survey identified differences in overall satisfaction among various demographic groups in 2024, which are consistent with findings from 2023:

- Younger adults, particularly those aged 15 to 34, continue to report lower overall satisfaction (62%) compared to older adults aged 65 and over, who remain the most satisfied riders (87%).
- Riders with disabilities (66%) and 2SLGBTIA+ riders (62%) reported below-average satisfaction, compared to the overall rate of 73%.
- Non-students report higher overall satisfaction (76%) compared to full-time (65%), part-time post-secondary (59%), and high school students (58%).
- Overall satisfaction is highest among commuters (75%), who primarily use transit for travel to work or school, followed closely by occasional riders (74%), and all-purpose riders (71%) who rely on transit for a variety of trip types beyond commuting.



Key Findings from Conventional Rider Monthly Survey

Overall satisfaction remained stable in 2024, with about three-quarters or 73% of riders reporting they were satisfied with the service— highlighting the convenience and accessibility of public transit. However, beneath this overall satisfaction, specific areas called for attention.



Safety remained a key driver of overall satisfaction, yet it consistently received the lowest ratings among all service aspects. In 2024, only 62% of respondents reported feeling safe during their transit journey, a figure unchanged from 2023.

Riders' sense of safety was influenced the most by their experiences as they waited to board their first transit vehicle (bus or LRT) and while on-board.



Cleanliness of the transit centres and LRT stations is a significant driver of overall satisfaction and was the second lowest rated aspect of service in 2024, alongside vehicle cleanliness. Nearly two-thirds of riders (64%) reported being satisfied with the cleanliness of each.



Onboard comfort remains a key factor in overall satisfaction. In 2024, 67% of respondents reported being satisfied with the level of comfort.

Riders define comfort in terms of vehicle cleanliness, safety and security measures, and seating quality, including legroom and seat comfort.



Reliability remains a core element of any transit system, and ETS is no exception. In 2024, 76% of riders reported being satisfied with reliability. However, some noted delays and inconsistencies, underscoring the need for continued improvements in this area.



Affordability remains an important factor in transit use. In 2024, satisfaction with value for money held steady at 66%. Notably, riders who used Arc fare products reported higher satisfaction (71%) compared to those using non-Arc fares (63%).





Regional Transit Research Study

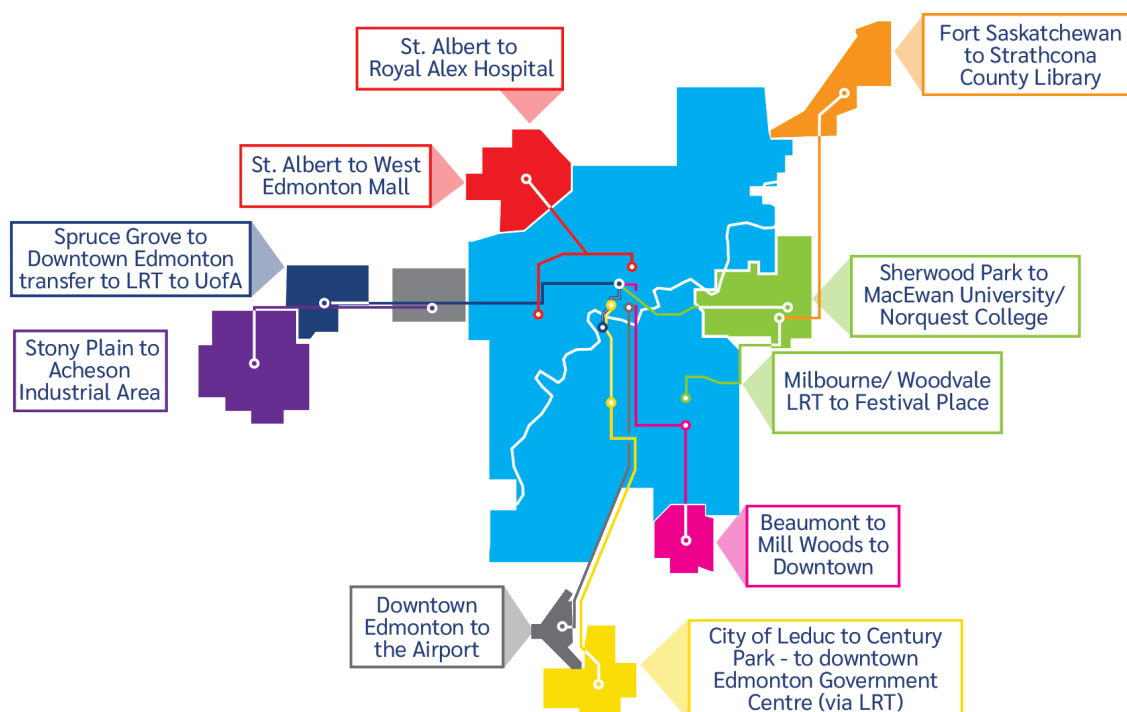
As one of the qualitative research focuses, ETS commissioned a study to explore transit riders' experiences across 10 regional routes connecting Edmonton and its surrounding communities. The study aimed to provide ETS and its regional partners valuable insights into riders' lived experiences, highlighting both barriers to usage and opportunities to improve the system.

Findings from this research will be leveraged to support efforts to:

- Increase awareness and promotion of regional transit routes
- Identify and prioritize service enhancements; and
- Inform future research and planning across the regional transit network.

Methodology

Twenty-two individuals participated in the study between November 25 to December 2, 2024. Participants completed up to 12 activities, including trip planning, sharing real-time experiences at various stages of their transit journey, and post-trip reflections. For each activity, they provided a rating and shared their experiences through videos, screen recordings, pictures, and text. Post-trip reflection activities aimed to gather deeper insights into participants' trip highlights, challenges, and suggestions for improvements. The map below highlights the 10 regional routes taken by participants across the study.



Key Learnings

Overall, regional transit riders expressed general sense of satisfaction with their experiences, particularly appreciating the comfort of regional buses. Features such as cushioned seating, clean interiors, and a stress-free commute—especially during peak hours or winter driving conditions—were frequently cited as strengths. These positive experiences encouraged new and occasional regional riders to view transit as a viable alternative to driving. However, participants also offered several suggestions to further enhance their experience, including:

- **Seamless Arc Card integration** across all transit systems and clearer communication about fare details would greatly enhance the regional transit experience. Inconsistent card usability and limited fare transparency created confusion and frustration for some participants.
- **A centralized transit information hub**, consolidating ETS and regional partner schedules, route planning tools, fare information, and live updates, was highly recommended. Currently, navigating multiple websites and apps is seen as cumbersome, with some users relying on phone support to confirm their trips.
- **Improving the coordination between local feeder routes and regional buses** was identified as a key way to improve transit accessibility and reduce reliance on personal vehicles for first-mile connections. Riders from outside Edmonton noted that local and regional route misalignment often adds inconvenience and discourages use.
- **Comfort during cold weather conditions** emerged as a significant issue. Riders reported long waits at exposed stops and shelters lacking sufficient protection. Suggestions included installing enclosed, heated shelters to improve the rider experience in winter and make regional transit more attractive year-round.



In-depth Research With Youth on Transit

Survey data from the ETS Rider Research Program in 2023 revealed that youth consistently reported lower satisfaction across all aspects of the transit experience compared to other rider groups. In response, ETS launched a qualitative study exploring the motivations, attitudes and barriers that influence transit use among youth, aiming to better understand the reasons behind their lower satisfaction.

The research delved into youth perceptions of ETS, their motivations for using transit, the barriers they face in accessing it, and strategies to support retention. It also explored their awareness of fare and safety programs, as well as preferred ways to reach youth through social media.

Methodology

A total of 33 youth participants, defined as individuals aged 12 to 24, took part in this research between August 7 and August 23, 2024. Participants were recruited through the Edmonton Insight Community, an online panel, and a network of community-based contacts in Edmonton. The study included a mix of focus groups and in-depth interviews with youth transit riders.

	Number of Sessions	Number of Participants
Young Adults (18-24 Years) Focus Groups	2	15
High School Students* Focus Groups	2	12
Junior High Students* Interview	6	6
Total	10	33

*High school and junior high students as of Fall 2024/2025 school year.

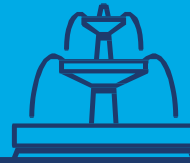
Key Learnings

Youth riders in the Edmonton area recognize the value of public transit, especially in terms of affordability and accessibility. For many, ETS serves its core purpose: getting them where they need to go safely and efficiently.

Whether it's confusion around the Arc card, feelings of anxiety when navigating routes, or concerns about safety, these challenges limit how confident youth feel using the system. Despite these barriers, youth also offer clear, actionable ideas for improvement that could make transit more inclusive, appealing, and functional for the next generation of riders.

- **Arc card:** Many students, especially in high school, shared concerns that rising fares or the removal of cash payment options would make transit less accessible. For those without access to debit or credit cards, cash serves as an important backup—its absence could create unintentional barriers.
- **Speed and Connectivity:** Young adults emphasized that speed matters. When travel times are long or unreliable, they're more likely to choose driving over transit. More efficient service could shift that equation, especially for those juggling work, school, and other commitments.
- **Security:** Participants shared a desire for a stronger, more visible presence of trained security personnel and greater support for drivers to help create a safer environment—particularly for younger riders traveling alone.
- **Communications:** Youth expressed a clear preference for information delivered through social media, especially platforms like Instagram and TikTok, where they already engage with content daily. At the same time, junior high students noted that physical posters inside buses and LRT cars catch their attention more than digital messages or signage at stations.





Dedicated Accessible Transit Service (DATS)





DATS Annual Survey

An annual survey with DATS riders/caregivers was conducted to gain a comprehensive understanding of their experiences along the travel journey. A random sample of DATS riders and caregivers was selected to participate in the survey and was administered online and via telephone between October 1, 2024, and November 7, 2024. In total, 320 respondents participated in the survey (279 in 2023); 82% were riders who had used DATS in the prior 12 months and 18% were caregivers who had who booked and/or accompanied riders on their trips.

Respondents were asked about:

- Usage and perceptions of DATS
- Booking of DATS trips
- Satisfaction with DATS on 18 aspects along the transit journey
- Overall transit experience and likelihood to recommend ETS
- Demographics

The results of the study were accurate with a margin of error of +/- 5.9%, 19 times out of 20.

Satisfaction metrics shown throughout this section are based on “Top 3-Box” calculation which refers to the sum of percentage of respondents who chose one of the top three options (e.g., the highest three ratings) on a seven-point satisfaction scale.

DATS Riders Trip Characteristics

A majority of respondents (64%) continue to use DATS as their primary mode of transportation. While most respondents continue to view DATS as convenient (49%), safe (45%), and affordable (43%), perceptions in each of these areas have declined compared to 2023.

At the same time, reliance on the service has increased. In 2024, 32% of respondents indicated that they, or the DATS client they book for, would not have been able to complete their most recent trip without the service, up from 23% in 2023.

Overall Satisfaction Metrics



Overall Transit Experience : 87% (93% in 2023)**

On a scale of 1 to 7, where 1 is extremely dissatisfied and 7 is extremely satisfied, how satisfied are you with your overall transit experience

Although overall satisfaction declined in 2024 to 87%, it still remains a strong figure compared to conventional riders.

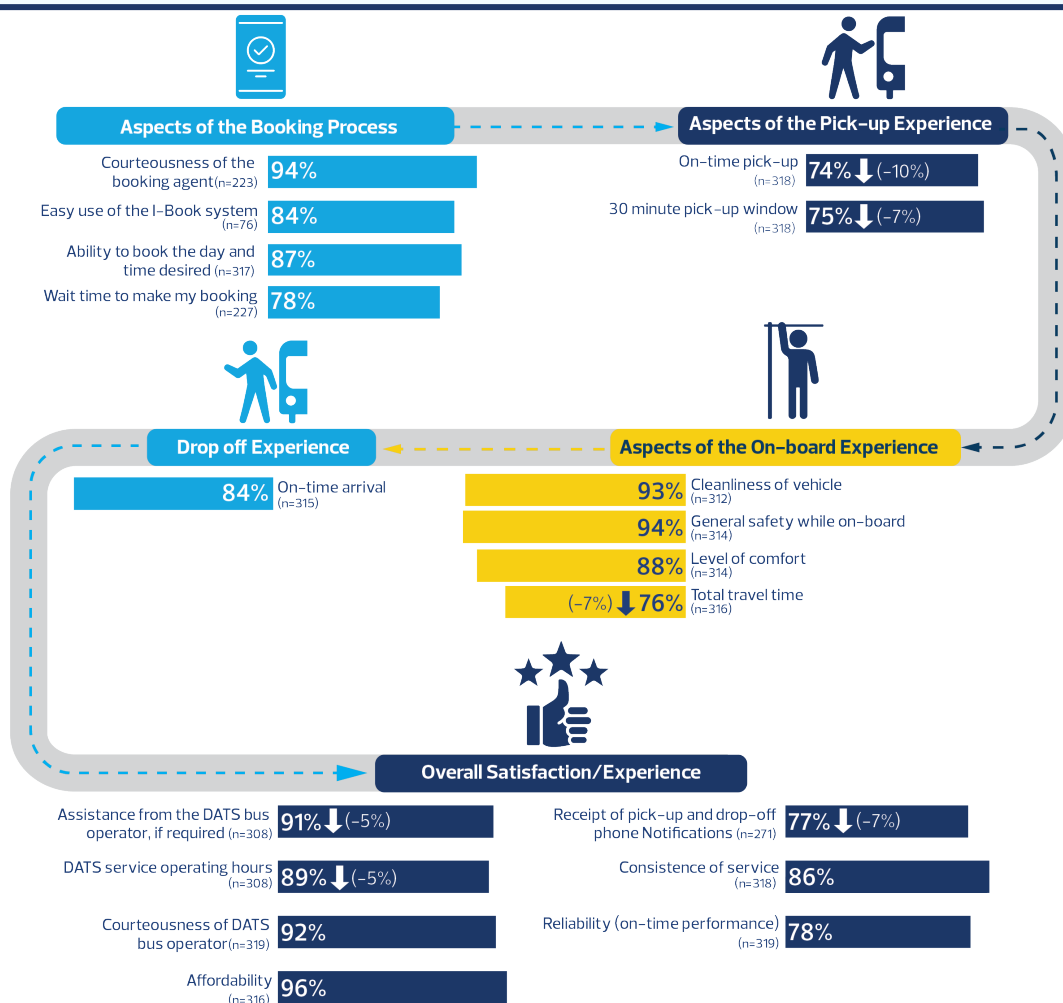


Satisfaction Along the Transit Journey (DATS)

This infographic summarizes riders' satisfaction scores in 2024 along the transit journey where respondents were asked: On a scale of 1 to 7, where 1 is extremely dissatisfied and 7 is extremely satisfied, how satisfied are you with DATS.

An upward or downward arrow is shown when the difference from 2023 is statistically significant, along with the corresponding percentage point increase or decrease in brackets. If no arrow appears, the difference from 2023 is not statistically significant.*

Overall, satisfaction with DATS across most aspects of the journey remained high, with many measures scoring above 90%. While some ratings declined significantly from 2023, they still reflect strong performance—particularly for service hours (89%) and operator assistance (91%). Notably lower scores were seen for the 30-minute pick-up window (75%), total travel time (76%), on-time pick-up (77%), and phone notifications (77%).



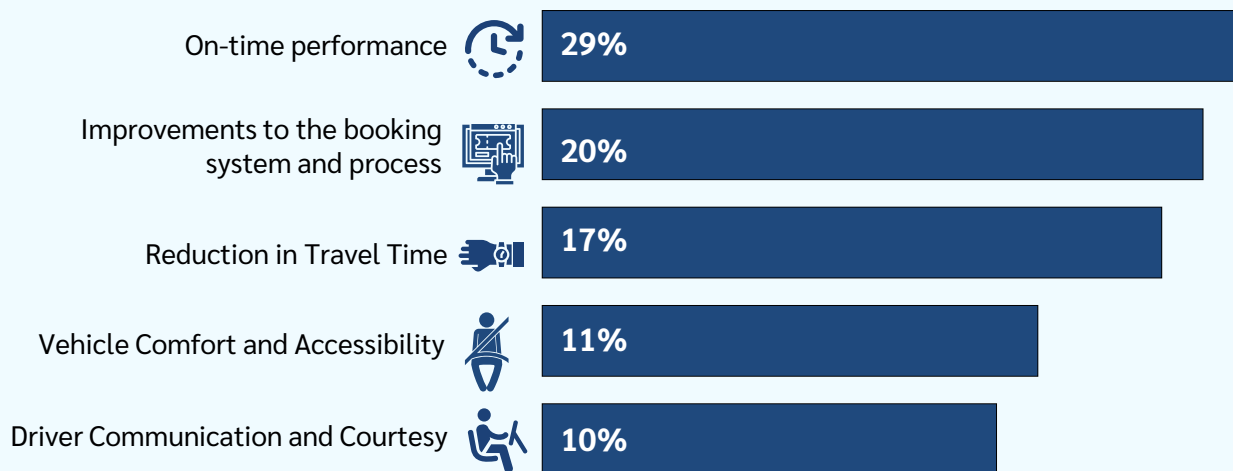
* based on a 95% confidence significance testing.



Suggestions for Improvement

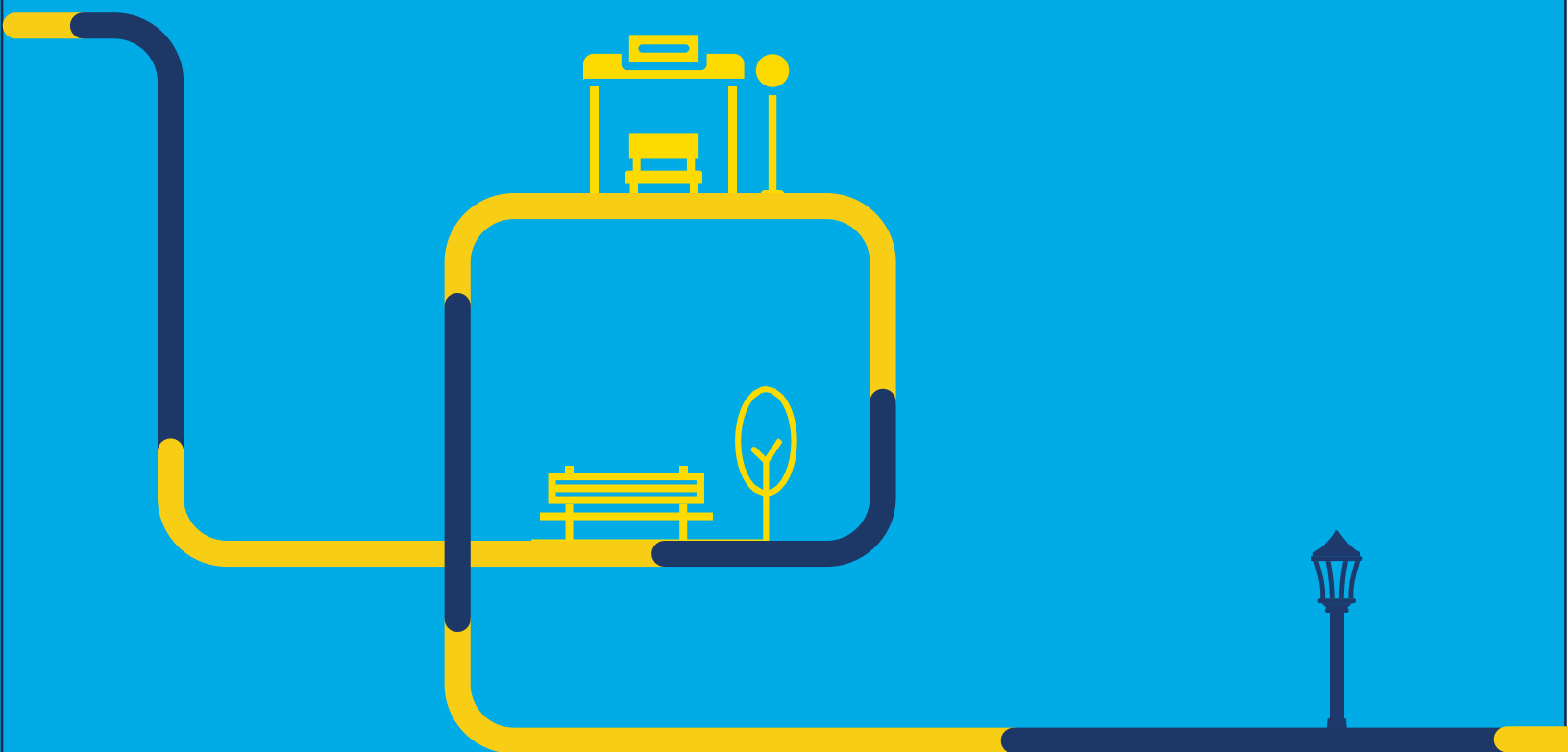
Of the survey respondents who used DATS and provided suggestions for improvement (n=242), about one-in-four (24%) indicated that no changes were needed. Among those who did share suggestions, the most commonly mentioned are for improvement was on-time performance (29%).

Suggestions for Improvement (n=242)





Non-Riders



Non-Riders Annual Survey

The 2024 ETS Non-Rider Survey was conducted during the fall of 2024. The objective of this research was to understand why individuals stopped using ETS and to identify potential service improvements that could encourage them to return.

Data was collected from 400 respondents through an online panel*. The survey targeted individuals who last used ETS services between April 2022 and September 2023 or who had used ETS infrequently (less than once a month) in the past 12 months.

Respondents were asked about:

- Historical use of ETS
- Current transportation choices
- Perceptions of ETS, and their likelihood of returning to transit use
- Demographics

**Transit riders aged 15+ residing in Edmonton were randomly selected from an online panel of pre-recruited individuals who have agreed to participate in surveys. Note that this is a non-probability sampling methodology and a margin of error cannot be reported. For comparison purposes, a probability sample of this size has an estimated margin of error (which measures sampling variability) of +/- 4.5%, 19 times out of 20.*





Overall Non-riders Perceptions of ETS

Although current ETS use is limited among non-riders, many reflected positively on their past experiences with the system:

- Overall satisfaction with the reliability of ETS among non-riders was 74%, and satisfaction with the overall transit experience was 67%—both measured using top-3 box scores*.
- One-third of non-riders recalled ETS as being convenient, and half had used ETS previously to avoid parking costs.
- One in five (21%) non-riders indicated that ETS was previously their only means of transportation, a notable increase from 14% in 2023.

Main Reasons for Non-usage of ETS

Life changes: For just over two-thirds of non-riders (69%), discontinued ETS use was due to a change in circumstances, meaning they no longer required the service, which included choosing to drive or having acquired a vehicle.

Personal Safety: Personal safety concerns remain a prominent issue, with one in four (26%) citing security concerns as a reason for stopping their use of public transit.

Limited Options/Scheduling: One in five (21%) non-riders pointed to transit related issues, such as long trip durations or schedules that didn't align with their needs, as reasons for discontinued use.

Suggested Improvements Influencing Future Usage of ETS



Improve Safety and Security



Fare Freeze/Reduction



Expand Service Coverage



Enhance Cleanliness and Maintenance

**A "Top 3-Box" calculation refers to the sum of percentage of respondents who chose one of the top three options (e.g., the highest three ratings) on a seven-point satisfaction scale.*





Appendix A

Demographics



Conventional Riders Survey Respondent Profile

In which of the following age categories do you fall? (n=3000)

Age Group	Percent
15 - 24 years	16%
25 - 34 years	22%
35 - 44 years	24%
45 - 54 years	15%
55 - 64 years	14%
65 - 74 years	7%
75 years or older	2%
Prefer not to answer	<1%

Where do you currently reside? (n=3000)

Municipality	Percent
City of Edmonton	89%
Beaumont	1%
Fort Saskatchewan	1%
Leduc	1%
Sherwood Park	1%
Spruce Grove	2%
St. Albert	3%

Indicate which of the following represents your total household income per year before taxes. (n=3000)

Household Income	Percent
Under \$20,000	10%
\$20,000 to under \$29,999	11%
\$30,000 to under \$39,999	8%
\$40,000 to under \$49,999	8%
\$50,000 to under \$59,999	10%
\$60,000 to under \$74,999	9%
\$75,000 to under \$99,999	17%
\$100,000 to under \$149,999	13%
\$150,000 or more	8%
Prefer not to answer	5%

Are you a member of any of the following?
[Select all that apply] (n=3000)

Identity	Percent
Racialized minority	22%
Born outside of Canada	15%
Persons with disabilities	14%
New to Canada (less than 1 year)	4%
New to Canada (1-5 years)	7%
Indigenous	8%
LGBTQ2S+	7%
Other	1%
None of the above	38%
Prefer not to answer	3%

What gender do you identify as? [Select all that apply] (n=3000)

Gender	Percent
Female	52%
Male	46%
Transgender	0%
Non-binary	1%
Two-spirit	<1%
Another gender not listed above	<1%
Prefer not to answer	1%

Are you a parent who has a child under the age of 18 years residing with you? (n=3000)

Parental Status	Percent
Yes	35%
No	65%

Are you currently attending school? (n=3000)

Student Status	Percent
Not currently a student	79%
Yes, high school student	4%
Yes, full time post-secondary student	8%
Yes, part time post-secondary student	4%
Yes, student in vocational college	2%
Prefer not to answer	4%

In terms of employment (including self-employment), how would you describe yourself? (n=3000)

Employment Status	Percent
Employed full time (30 hours or more per week)	50%
Employed part time (less than 30 hours per week)	15%
Student	8%
Retired	9%
Not employed (not related to COVID-19 crisis)	7%
Unable to work	6%
Stay at home parent	2%
Prefer not to answer	2%



DATS Respondent Profile

In which of the following age categories do you fall? (n=320)

Age Group	Percent
18 - 64 years	45%
65 - 74 years	27%
75 years or older	27%
Prefer not to answer	1%

Indicate which of the following represents your total household income per year before taxes. (n=320)

Household Income	Percent
Under \$20,000	18%
\$20,000 to under \$29,999	26%
\$30,000 to under \$39,999	9%
\$40,000 to under \$49,999	7%
\$50,000 to under \$59,999	3%
\$60,000 to under \$74,999	2%
\$75,000 to under \$99,999	2%
\$100,000 to under \$149,999	1%
\$150,000 or more	1%
Prefer not to answer	32%

Are you a member of any of the following? [Select all that apply] (n=320)

Identity	Percent
Racialized minority	11%
Indigenous (as defined in Canada as First Nations, Métis or Inuit)	6%
New to Canada (less than 1 year)	1%
LGBTQ2S+	3%
None of the above	64%
Prefer not to answer	16%

What gender do you identify as? [Select all that apply] (n= 320)

Gender	Percent
Woman	55%
Man	41%
Transgender	<1%
Non-binary	1%
Two-spirit	1%
Another gender not listed above	0%
Prefer not to answer	3%

Are you currently attending school? (n=320)

Student Status	Percent
Not currently a student	91%
Yes, High school student	0%
Yes, Full time post-secondary student	1%
Yes, Part time post-secondary student	1%
Yes, Student in vocational college	1%
Prefer not to answer	6%

In terms of employment (including self-employment), how would you describe yourself? (n=320)

Employment Status	Percent
Employed full time (30 hours or more per week)	7%
Employed part time (less than 30 hours per week)	8%
Not employed	7%
Unable to work	28%
Stay at home parent	<1%
Retired	46%
Prefer not to answer	5%

Do you have children, 18 years old or under, living at home? (n=320)

Parental Status	Percent
Yes	7%
No	89%
Prefer not to answer	4%



Non-Rider Respondent Profile

In which of the following age categories do you fall? (n=400)

Age Group	Percent
15 - 24 years	12%
25 - 34 years	25%
35 - 44 years	20%
45 - 54 years	15%
55 - 64 years	16%
65 - 74 years	10%
75 years or older	3%

Where do you currently reside? (n=400)

Municipality	Percent
City of Edmonton	76%
Beaumont	3%
Fort Saskatchewan	3%
Leduc	1%
Sherwood Park	6%
Spruce Grove	6%
St. Albert	6%

Indicate which of the following represents your total household income per year before taxes. (n=400)

Household Income	Percent
Under \$20,000	8%
\$20,000 to under \$29,999	7%
\$30,000 to under \$39,999	8%
\$40,000 to under \$49,999	11%
\$50,000 to under \$59,999	9%
\$60,000 to under \$74,999	13%
\$75,000 to under \$99,999	14%
\$100,000 to under \$149,999	14%
\$150,000 or more	12%
Prefer not to answer	4%

Are you a member of any of the following? [Select all that apply] (n=400)

Identity	Percent
Racialized minority	13%
Persons with disabilities	12%
Indigenous (as defined in Canada as First Nations, Métis or Inuit)	9%
New to Canada (less than 1 year)	1%
New to Canada (1 - 5 years)	3%
Born outside of Canada	9%
2SLGBTQIA+	6%

What gender do you identify as? [Select all that apply] (n=400)

Gender	Percent
Woman	57%
Man	43%
Transgender	1%
Non-binary	1%
Two-spirit	<1%
Prefer not to answer	<1%

Are you a parent who has a child under the age of 18 years residing with you? (n=400)

Parental Status	Percent
Yes	31%
No	69%

Are you currently attending school? (n=400)

Student Status	Percent
Not currently a student	88%
Yes, high school student	3%
Yes, full time post-secondary student	5%
Yes, part time post-secondary student	3%
Yes, student in vocational college	1%
Prefer not to answer	1%

In terms of employment (including self-employment), how would you describe yourself? (n=400)

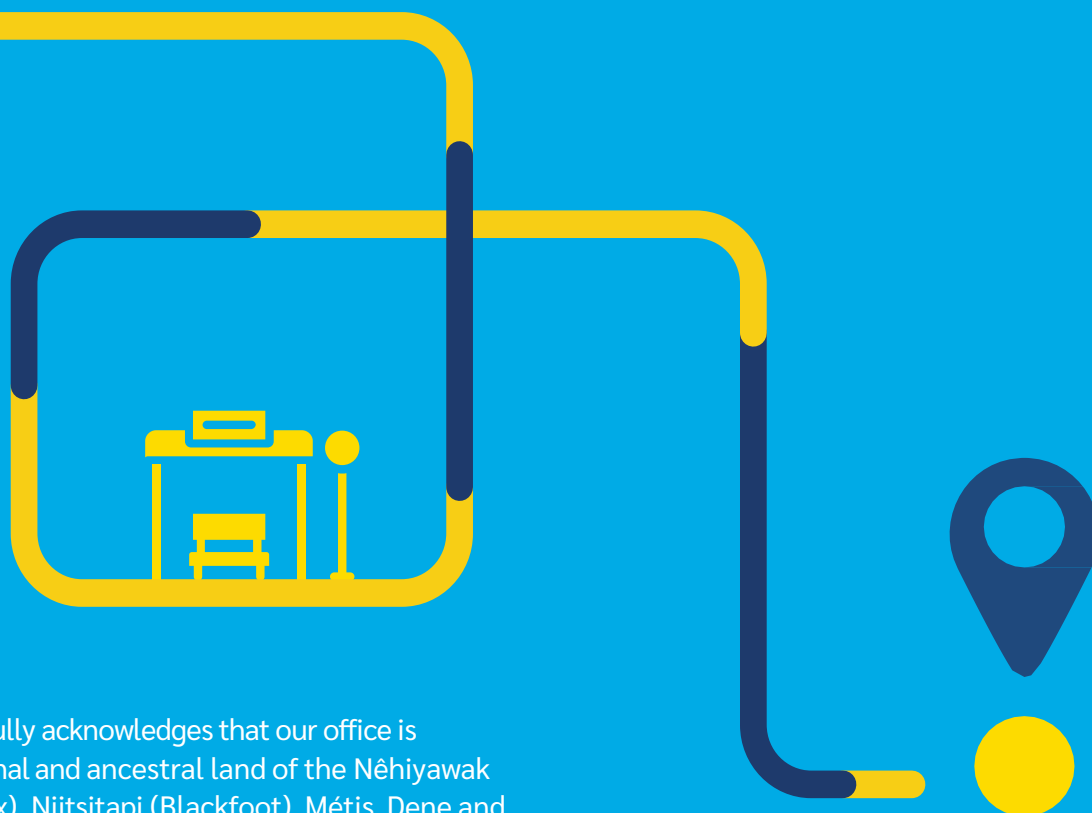
Employment Status	Percent
Employed full time (30 hours or more per week)	45%
Employed part time (less than 30 hours per week)	19%
Not employed	13%
Unable to work	6%
Stay at home parent	4%
Retired	13%
Prefer not to answer	1%



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