

2018 Annual Report

Edmonton Transit Service Customer Satisfaction Tracking Survey

Edmonton



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MARKET RESEARCH

Executive Overview

Introduction

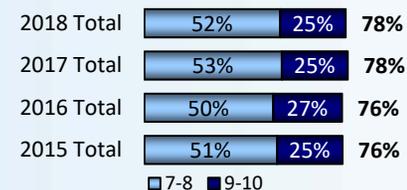
- To monitor customer satisfaction and assess the impact of future changes in service delivery, a new tracking study for the Edmonton Transit Service (ETS) was implemented in October 2014. Initially conducted with **past year** customers, this continuous, random probability telephone survey was re-focused 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 2018 calendar year are summarized in this *Executive Overview* with more complete, illustrated results in the *Detailed Findings* section of this report. Comparisons are made where applicable to previous measures.
- 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.
- Similar to past three years, over 75% of the 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).

Overall Satisfaction



- Seasonally, the fourth quarter registers the lowest level of satisfaction (significantly lower than Q1 & Q2). Opinions are largely similar by mode type (bus, LRT), geography and demographics, but high frequency riders are more satisfied this year.
- A majority within each customer segment is satisfied, with highest ratings reported by secondary students (89%), and the lowest by riders with a disability (66% 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: 'Bus frequency' and 'Park and Ride Facilities', 63% satisfied each
- Year to Year:** Among the 30 attributes measured, satisfaction levels are largely consistent with previous years, but two attributes see improvement while four see some weakening.
 - Declines: Although still among the top ratings, 2018 sees a softening in satisfaction for fare purchase options, duration of the trip, convenient bus stop locations and for safety while waiting at LRT stations, at transit centres and while onboard LRT's (likely due to safety incidents/ issues regarding LRT's and buses, particularly in the fall season).

Service Attributes, cont.

- Improvements: Meanwhile, ease of trip planning has regained strength and gradual improvement continues for bus on-time reliability.
- Top rated attributes** see the highest satisfaction levels with 81% or more customers satisfied in total and with 35-62% 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:** Results are mostly consistent between quarters; however, declines are registered in Q4 regarding bus on-time reliability, overcrowding and enough shelters. In addition, lower Q4 proportions of 'extremely satisfied' are seen for safety onboard LRT, waiting at transit centres and at bus stops (likely due to safety incidents/ issues regarding LRT's and buses, particularly in this season).

➤ 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:** Most service attributes where ETS finds success have only moderate influence on overall satisfaction and none exert a strong influence. However, the following attributes are at or slightly above average in importance to customers:
 - **Convenient bus stop locations** (0.46)
 - **LRT on-time reliable service** (0.46)
 - **Safety on board LRT** (0.45)
 - **Safety on board bus** (0.44)
- 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 and of highest priority (in order of importance):
 - **Good connections** (0.54, most important)
 - **Bus frequency** (0.54, most important)
 - **Trip duration** (0.52)
 - **Bus on-time reliability** (0.52)
 - **Value for fare** (0.51)
 - **ETS hours of operation** (0.49)
 - **ETS communications with customers** (0.44)

Executive Overview (cont.)

Loyalty

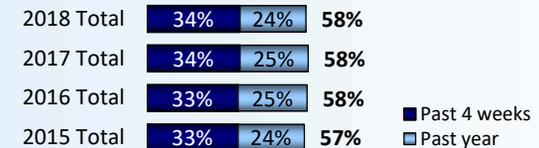
- Likelihood to recommend ETS** to a friend or colleague (assuming routes are suitable for them) serves as a measure of satisfaction and loyalty. This measure is highly correlated with overall service satisfaction, as it is an outcome of overall experiences and perceptions about ETS. Attributes most 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 (40% and 42% respectively), while 18% are detractors. Detractors are most unhappy with ETS value for fare, bus frequency, connections, bus on-time reliability, overcrowding on buses, communications, not enough shelters and total trip duration.

Motivators

- The most common reason for choosing transit over other modes of transportation is affordable cost, consistent with 2017 but higher than in 2016 and 2015. Also mentioned are not having to worry about parking or driving (consistent over time) and that no other option is available (lower than the 2015 benchmark).
- 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:** As in 2017, there are more high frequency riders (37% vs 33% in 2015). The total average trip rate is statistically unchanged, but there is a directional increase among low frequency riders (6.9 to 7.3 this year).



- Average = 20.3 one-way trips per past 4 week customer**
- Low frequency rider: 7.3 trips vs. High frequency rider: 43.2 trips**
- Combined use of bus and LRT in the same trip is similar to 2017 past 4 week trip volume (32%) and remains higher than the 28% in reported in 2015.
- Perceived change in usage:** Similar to previous measures, past four week riders tend to think their transit use is about the same as one year ago (60%). The remainder are evenly divided between using transit less regularly and using it more often (20% each).
- Services used in past year:** The incidence of using LRT and bus in the past year is identical (87% each).

➤ Executive Overview (cont.)

Current Usage, cont.

■ Services used in past year

- A total of 68% of riders looked at or asked for ETS route information in 2018, consistent with 2017 results (67%) and mirroring 2015 levels after a decline in 2016 (61%). **ETS' online trip planner** is the primary source (65%, higher than the past two years), followed by Google Maps (up significantly over time and now 62%). As well, use of poster/info at the stop/station has again increased (41%).
- Park and Ride is used by 23% of past 4 week customers.

■ Trip characteristics among past 4 week riders

- The most popular trip purposes are personal business (65%), social/ recreational (62%), and special events (58%). This is followed by work commuting (56%) and shopping (42%), then post secondary school (24%) and grade school (10%).
- The 'most frequent' trip is reported to be in the weekday p.m. peak (60%), followed by the a.m. peak (51%) and the midday and weekend travel (46% and 41% respectively).
- Payment methods among past 4 week customers are split about equally between tickets (30%) and monthly passes (28%), compared with cash used by 21%.
- Most past 4 week riders walk to their stop (83%, higher than in 2017), averaging six and a half minutes to arrive at the system start point (at a bus stop 66% vs. 34% at LRT/transit centre). Only 17% use a car to get to the start point. 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 2017.

Past 4 Week Customer Profiles

- **Demographic differences** between past 4 week ETS riders and all Edmonton residents in this year's survey:
 - Younger (27% are 15-24 years old vs. 14% in population)
 - Fewer seniors 65+ (10% vs. 15% of population)
 - More enrolled students (27% vs. 13% of population)
 - More transit users aged 15+ in the household (average of 2.0 vs. 1.3 in general population)
- **Disabilities among ETS past 4 week riders:** Consistent with previous years, 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 (also similar to past years), meaning that the large majority of disabled riders use the conventional ETS service.
- **Vehicle access among ETS past 4 week riders:** Unchanged over time, 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 by mode type, geography, demographics and rider frequency. However, a significantly lower rating is provided in the fall compared to other seasons throughout the year.
- 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 35% to 62% for the most well-regarded/top tier attributes.
- 3. Improvements:** Gradual improvement continues for bus on-time reliability (65% in 2015 to 72% currently) and recovery for ease of trip planning (84% in 2015, down to 81% and 82% in the following two years, but now at 85%).
- 4. Weakening:** Although still among the top ratings, statistical weakening seen for fare purchase options (80% in 2015 to 76% currently), convenient bus stop locations (87% in 2015 to 84% this year), safety while waiting at LRT stations and at transit centres (both from 79% in 2015 to 74% currently), safety onboard LRT's (86% in 2015 to 83% this year) and duration of the trip (81% in 2015 to 77% currently). Incidents and issues that occurred with regards to safety with ETS in 2018 are likely the cause for the declines in safety attributes cited above.

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: **Convenient bus stop locations, LRT on-time reliability, and safety on board bus and LRT.** 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** (most important)
 - **Bus frequency** (equally most important)

Key Drivers, cont.

- 2. Opportunity (cont.):**
 - **Trip duration**
 - **Bus on-time reliability**
 - **Value for fare**
 - **ETS hours of operation**
 - **ETS communications**
- 3. Loyalty:** Most correlated with loyalty (likelihood to recommend) are: **value for fare paid** - the most important, but good connections and trip duration are also key drivers.

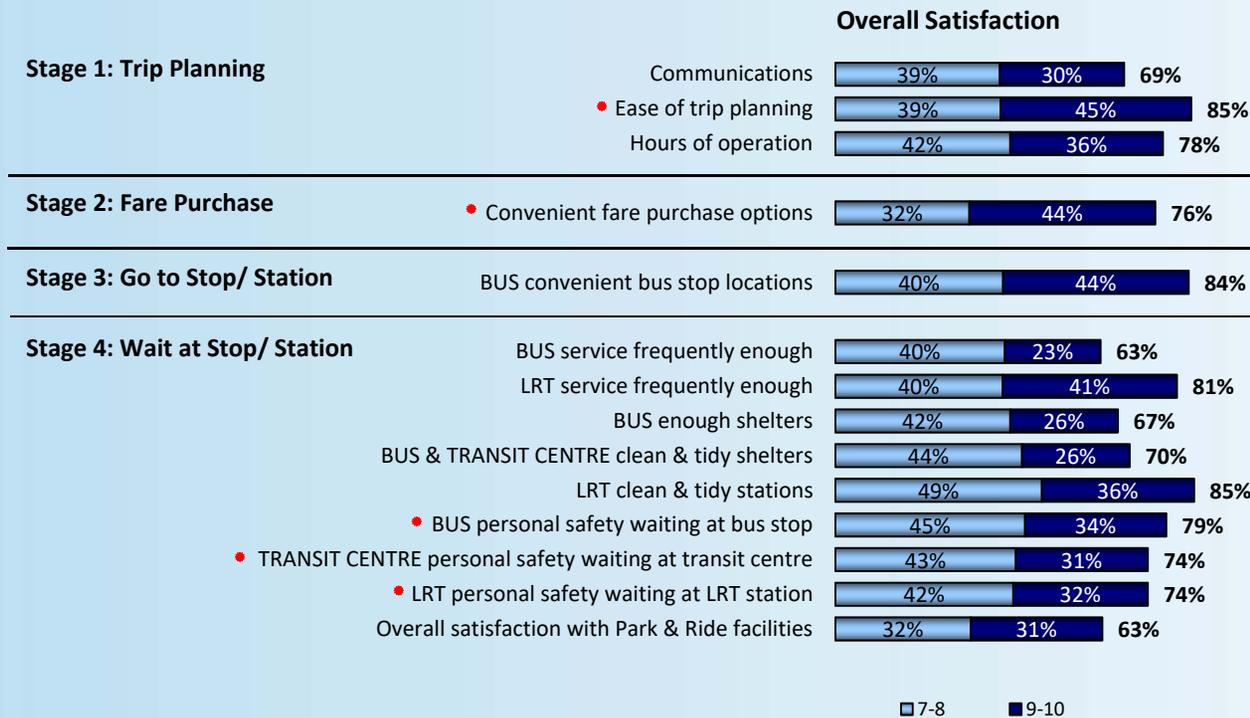
ETS Usage Monitoring

- 1. Ridership incidence stable** for past 3-year customers but past year level on an upwards trend (75%, inching closer to the 77% in 2015).
- 2. Trip rate** also stable among past 4-week customers:
 - Past 4-week ratio of high frequency to low frequency ridership same as in 2017 (37% and 63% respectively).
 - Average trip rate in past 4 weeks relatively unchanged (20.3 currently).
 - Significantly higher trip rates among middle-aged, workplace commuters, secondary and post-secondary students segments.
- 3. ETS services** use improvements/changes:
 - Continued increase in use of both Google Maps (now at 62%, up to from 50% in 2017) and posters/info stop or station (41% in 2018 compared to 32% the previous year).

Trip Characteristics Monitoring: No significant changes are reported.

➤ Satisfaction with Specific Service Attributes — Detail

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



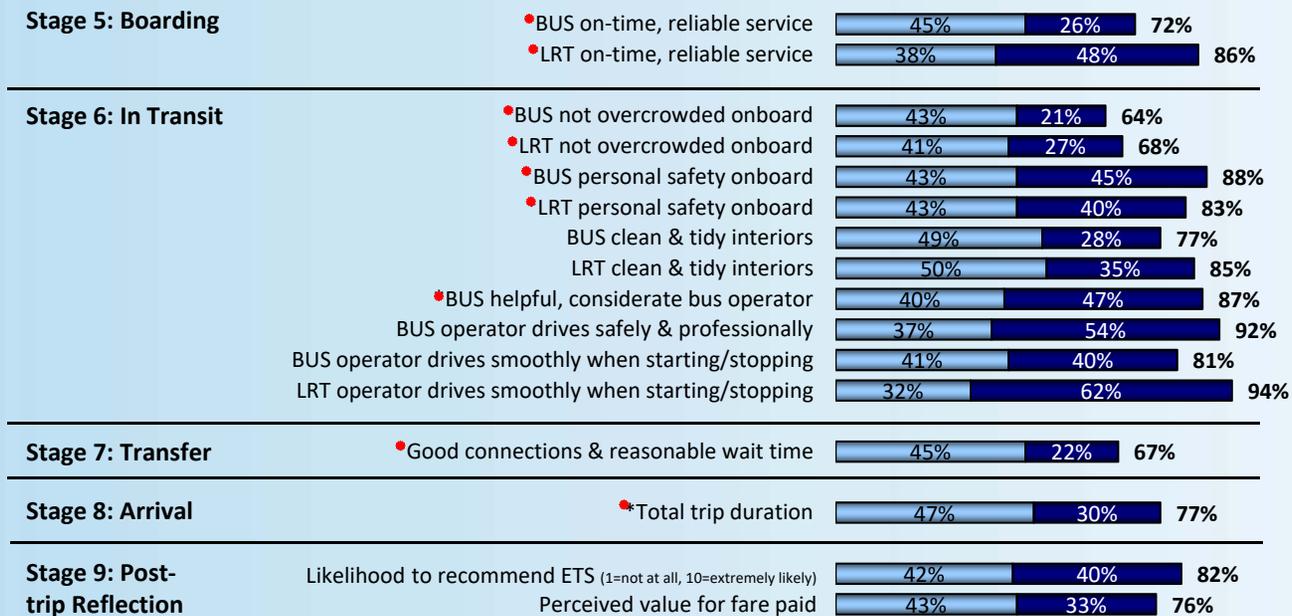
** indicates Critical Moment of Truth*

% Satisfied = Rating 7-10 out of 10

% Extremely satisfied = Rating 9-10

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

Overall Satisfaction



* indicates Critical Moment of Truth

% Satisfied = Rating 7-10 out of 10

% Extremely satisfied = Rating 9-10

□ 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.

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

- 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 2018 in comparison to previous measures.

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 2018, a total of 4,873 screener interviews were conducted resulting in 1,613 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 2018 year sample, the margin of error on 1,613 interviews is ± 2.4 percentage points.
 - The margin of error is ± 3.8 percentage points when comparing 2018 results to the 2015 base of 1,099 interviews with past 4 week riders.
- Dates of interviewing for 2018, excluding holidays, were:
 - Q1: January 1 – March 28
 - Q2: April 1 – June 26
 - Q3: July 3 – September 22
 - Q4: October 1 – December 21
- A copy of the questionnaire is appended; detailed data tabulations have been provided separately.