

2016 Annual Summary Report

Edmonton Transit Service Customer Satisfaction Tracking Survey

Edmonton



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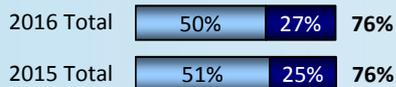
Executive Overview

Key Findings

Overall Satisfaction with ETS

- Satisfaction with Edmonton Transit Service (ETS) 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 found in 2015, 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' (27% 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



7-8 9-10

- A majority within each customer segment is satisfied, including the larger segments—workplace commuters, families, post-secondary students and special event riders (72-85%). Ratings are highest for secondary students (92%) and lowest for riders with a disability (63%). Seniors aged 65+ express the strongest level of appreciation (41% are extremely satisfied).

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



- Year to Year:** Among the 30 attributes measured, satisfaction levels are largely consistent with 2015
- Top rated attributes** see the highest satisfaction levels with 80% or more customers satisfied in total and with 42-64% 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, trip length), **safety** (onboard bus & LRT), **cleanliness** (LRT station & interior) and easy to use **trip planning** information.



➤ Executive Overview (continued)

Service Attributes, cont.

- Seven variables fall into the lowest tier of attributes with total satisfied levels falling in the 63-69% range, including:
 - Bus-related time factors (connections, bus reliability and 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.

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.
- **Success:** ETS has found some degree of success from the following service attributes, which are found to be of some importance to customers. However, while these are well regarded, all could still use further improvement. Continuing to reinforce or expand these aspects of service should help to increase overall satisfaction with ETS.
 - **Ease of trip planning information**
 - **Helpful, considerate bus driver**
 - **Bus stop convenience**
 - **LRT frequency**
 - **LRT on-time, reliable service**
- **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 likely to net greatest return on overall satisfaction:
 - **Good connections** (the most important this year)
 - **Bus on-time reliability** (2nd most important)
 - **Trip duration**
 - **Bus frequency**
 - **Value for fare**
 - **ETS communications**
- Note that a number of changes implemented by ETS in late 2016 may assist in such efforts (SMART Bus technology on all buses, bus route changes to address overcrowding, wait times and connectivity). Continued monitoring of these attributes is likely to reveal the impact of changes.



➤ Overall Satisfaction

Scale and Definitions of Satisfaction

Customers evaluated their satisfaction with ETS overall and for a series of selected attributes* using a 10-point rating scale where 1 means 'not at all satisfied' and 10 means 'completely satisfied'. The following terms are defined and used in this report:

Total Satisfied = positive scores (7 through 10)

Extremely Satisfied = highest scores (9 or 10)

** Note, one exception is for likelihood of recommending ETS using scale anchors of 1 not at all likely and 10 extremely likely.*

Overall Satisfaction

Customers were asked to reflect on their own experience with Edmonton's public transit system over the past 4 weeks.

Unchanged from 2015, a majority of customers are satisfied with ETS overall. In total, just over three-quarters of customers give ETS a score of 7 to 10 out of 10.

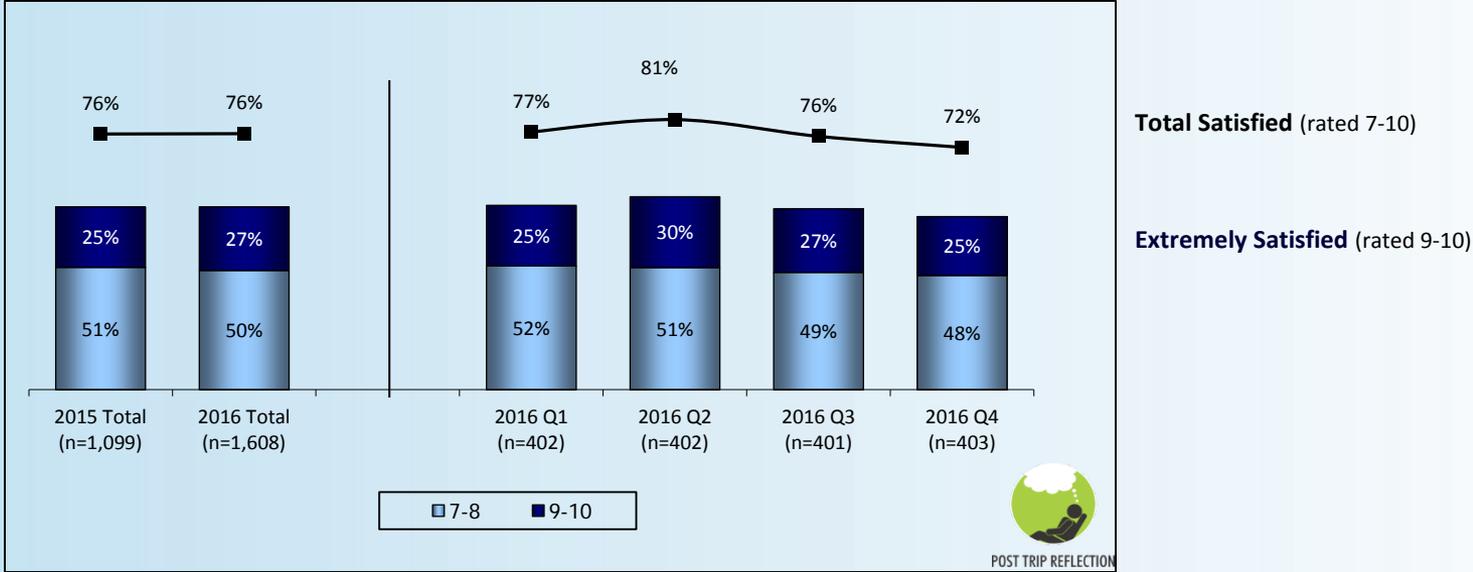
Furthermore, 27% are extremely satisfied (ratings of 9 or 10 out of 10), also similar to 2015. While less than one-quarter give ratings below 7, most of these fall into a neutral range (5 or 6).

- **Seasonally:** Evaluations were relatively consistent throughout the year, but peaked in Q2.
- **Geography:** There are no significant differences across the four City quadrants.

- **Demographics:** Total satisfaction is largely consistent across gender and age, but some difference in strength of satisfaction is noted by age and customer segment.
 - Middle-aged and older customers are more likely to give ETS top scores of 9 or 10 out of 10 (29% and 37%, respectively, vs. 21% for those under 35 years of age).
 - Seniors aged 65+ are especially complimentary (42% extremely satisfied and 85% satisfied in total)—the highest among the customer segments examined.
 - Secondary students are also among the most satisfied (38% extremely satisfied, 82% total satisfied), while somewhat lower satisfaction is seen among work commuters and special event riders (each at 72% satisfied).
- **Rider type differences:** Satisfaction ratings are similar by rider type.
 - **High frequency** (25+ one-way trips per month): 78% total satisfied with 28% extremely satisfied.
 - **Low frequency** (1-24 one-way trips per month): 76% total satisfied with 26% extremely satisfied.



➤ Overall Satisfaction with Edmonton Transit Service



Base: Total transit riders

Q.10) Overall, how satisfied are you with the Edmonton Transit Service?

Please use a scale from 1 to 10 where 1 means 'Not at all satisfied' and 10 means 'Completely satisfied'.



➤ Satisfaction with Specific Service Attributes — Seasonally

- ETS performance across the customer experience stages is summarized in the following tables.
 - Year to Year:** Satisfaction is similar to last year, but dipped for LRT on-time reliability and very slightly for ease of trip planning and LRT service frequency. Improvement was seen in 2016 for bus operator driving smoothly when starting/stopping and bus frequency (extremely satisfied).
 - Seasonally:** While there were some fluctuations between quarters, there are no sustaining trends in the past year, indicating general stability.

| Customer Experience Stage & Service Attribute | 2015 Total | 2016 Total | Jan – Mar 2016 | Apr – Jun 2016 | Jul - Sep 2016 | Oct – Dec 2016 |
|---|------------|------------|-------------------------------------|----------------|----------------|----------------|
| Stage 1: Trip Planning | | | % Satisfied (% Extremely satisfied) | | | |
| Communications | 72% (32%) | 69% (33%) | 70% (34%) | 69% (34%) | 67% (32%) | 68% (32%) |
| *Ease of trip planning | 84% (48%) | 81% (49%) | 81% (49%) | 83% (49%) | 81% (49%) | 80% (48%) |
| Hours of operation | 80% (36%) | 78% (38%) | 78% (40%) | 80% (36%) | 76% (37%) | 77% (38%) |
| Stage 2: Fare Purchase | | | % Satisfied (% Extremely satisfied) | | | |
| *Convenient fare purchase options | 80% (45%) | 78% (46%) | 78% (46%) | 81% (51%) | 78% (44%) | 75% (39%) |
| Stage 3: Go to Stop/Station | | | % Satisfied (% Extremely satisfied) | | | |
| BUS convenient bus stop locations | 87% (44%) | 85% (45%) | 86% (43%) | 90% (50%) | 81% (44%) | 81% (42%) |
| Stage 4: Wait at Stop/Station | | | % Satisfied (% Extremely satisfied) | | | |
| BUS service frequently enough | 62% (22%) | 63% (25%) | 62% (25%) | 62% (27%) | 66% (25%) | 61% (25%) |
| LRT service frequently enough | 85% (46%) | 80% (43%) | 82% (44%) | 84% (42%) | 80% (46%) | 76% (39%) |
| BUS enough shelters | 66% (25%) | 67% (27%) | 65% (26%) | 70% (30%) | 70% (28%) | 65% (25%) |
| BUS & TRANSIT CENTRE clean & tidy shelters | 71% (25%) | 73% (28%) | 73% (26%) | 74% (28%) | 71% (30%) | 75% (28%) |
| LRT clean & tidy stations | 89% (46%) | 88% (44%) | 89% (45%) | 90% (44%) | 84% (42%) | 87% (43%) |
| *BUS personal safety waiting at bus stop | 81% (34%) | 79% (35%) | 76% (31%) | 82% (38%) | 79% (36%) | 79% (35%) |
| *LRT personal safety waiting at station | 79% (34%) | 79% (35%) | 77% (33%) | 78% (37%) | 78% (33%) | 81% (35%) |
| *TRANSIT CENTRE personal safety waiting at transit centre | 79% (35%) | 77% (35%) | 75% (36%) | 78% (35%) | 75% (34%) | 80% (36%) |
| Overall satisfaction with Park & Ride facilities | 72% (34%) | 67% (28%) | 72% (31%) | 72% (27%) | 67% (28%) | 59% (25%) |

* indicates Critical Moment of Truth (times or aspects of the experience that can trigger strong feelings among customers)

% Satisfied = Rating 7-10 out of 10

% Extremely satisfied = Rating 9-10

➤ Satisfaction with Specific Service Attributes — Seasonally, cont.

| Customer Experience Stage & Service Attribute | 2015 Total | 2016 Total | Jan - Mar 2016 | Apr – Jun 2016 | Jul – Sep 2016 | Oct – Dec 2016 |
|---|-------------------------------------|------------|----------------|----------------|----------------|----------------|
| Stage 5: Boarding | % Satisfied (% Extremely satisfied) | | | | | |
| *BUS on-time, reliable service | 65% (27%) | 68% (27%) | 67% (25%) | 72% (31%) | 67% (25%) | 65% (26%) |
| *LRT on-time, reliable service | 88% (51%) | 82% (47%) | 85% (51%) | 82% (47%) | 83% (48%) | 79% (43%) |
| Stage 6: In Transit | % Satisfied (% Extremely satisfied) | | | | | |
| *BUS not overcrowded onboard | 65% (22%) | 65% (23%) | 61% (20%) | 71% (27%) | 63% (23%) | 65% (24%) |
| *LRT not overcrowded onboard | 70% (27%) | 71% (29%) | 71% (29%) | 76% (30%) | 70% (27%) | 66% (28%) |
| *BUS personal safety onboard | 90% (48%) | 89% (48%) | 87% (47%) | 90% (50%) | 86% (46%) | 92% (50%) |
| *LRT personal safety onboard | 86% (43%) | 85% (43%) | 85% (44%) | 83% (44%) | 85% (41%) | 85% (44%) |
| BUS clean & tidy interiors | 79% (32%) | 79% (31%) | 78% (28%) | 83% (29%) | 73% (33%) | 81% (34%) |
| LRT clean & tidy interiors | 89% (44%) | 87% (42%) | 86% (41%) | 90% (42%) | 86% (42%) | 86% (43%) |
| *BUS helpful, considerate bus operator | 88% (48%) | 87% (49%) | 89% (46%) | 87% (51%) | 85% (47%) | 89% (50%) |
| BUS operator drives safely & professionally | 90% (54%) | 92% (57%) | 90% (54%) | 91% (57%) | 91% (57%) | 93% (59%) |
| BUS operator drives smoothly when starting/stopping | 83% (38%) | 83% (43%) | 84% (39%) | 84% (46%) | 83% (47%) | 83% (39%) |
| LRT operator drives smoothly when starting/stopping | 94% (62%) | 94% (64%) | 94% (63%) | 94% (65%) | 96% (68%) | 91% (60%) |
| Stage 7: Transfer | % Satisfied (% Extremely satisfied) | | | | | |
| *Good connections & reasonable wait time | 67% (24%) | 67% (23%) | 70% (20%) | 70% (25%) | 67% (26%) | 63% (22%) |
| Stage 8: Arrival | % Satisfied (% Extremely satisfied) | | | | | |
| *Total trip duration | 81% (33%) | 79% (32%) | 80% (29%) | 78% (34%) | 79% (31%) | 77% (33%) |
| Stage 9: Post-trip Reflection | % Satisfied (% Extremely satisfied) | | | | | |
| Likelihood to recommend ETS (1=not at all, 10=extremely likely) | 87% (43%) | 84% (42%) | 87% (42%) | 86% (44%) | 85% (43%) | 80% (39%) |
| Perceived value for fare paid | 75% (32%) | 78% (32%) | 77% (32%) | 81% (33%) | 78% (34%) | 73% (29%) |

* indicates *Critical Moment of Truth* (times or aspects of the experience that can trigger strong feelings among customers)

% Satisfied = Rating 7-10 out of 10

% Extremely satisfied = Rating 9-10

| 2016 Customer Experience Stage | Highest Satisfaction Tier (80% satisfaction and above) (% Total, % Extremely Satisfied) | Moderate Satisfaction Tier (70- 79% satisfaction) (% Total, % Extremely Satisfied) | Lower Satisfaction Tier (69% satisfaction and below) (% Total, % Extremely Satisfied) |
|--|---|--|--|
| Stage 1: Trip Planning  | Easy to use trip planning info (81% total, 49% extremely) | Hours of operation (78% total, 38% extremely) | ETS communications (69% total, 33% extremely) |
| Stage 2: Fare Purchase  | | Fare purchase convenience (78% total, 45% extremely) | |
| Stage 3: Go to Stop/ Station  | Bus stop convenience (85% total, 45% extremely) | | |
| Stage 4: Wait at Stop/ Station  | LRT station clean/tidy (88% total, 44% extremely) LRT frequency (80% total, 43% extremely) | Bus stop safety waiting (79% total, 35% extremely) LRT station safety waiting (79% total, 35% extremely) Transit Centre safety waiting (77% total, 35% extremely) Bus stop/Transit Centre clean/tidy (73% total, 28% extremely) | Park & Ride facilities (67% total, 28% extremely) Enough bus shelters (67% total, 27% extremely) Bus frequency (63% total, 25% extremely) |
| Stage 5: Boarding  | LRT on time/reliable (82% total, 47% extremely) | | Bus on time/reliable (68% total, 27% extremely) |
| Stage 6: In Transit  | LRT operator drives smoothly (94% total, 64% extremely) Bus operator drives safely/ professionally (92% total, 57% extremely) Bus safety onboard (89% total, 48% extremely) Bus operator helpful, considerate (87% total, 49% extremely) LRT interior clean/tidy (87% total, 42% extremely) LRT safety onboard (85% total, 43% extremely) Bus operator drives smoothly (83% total, 43% extremely) | Bus interior clean/tidy (79% total, 31% extremely) LRT not overcrowded (71% total, 29% extremely) | Bus not overcrowded (65% total, 23% extremely) |
| Stage 7: Transfer  | | | Good connections (67% total, 23% extremely) |
| Stage 8: Arrival  | | Total trip duration (79% total, 32% extremely) | |
| Stage 9: Post-trip Reflection  | Likely to recommend (84% total, 42% extremely) | Value for fare paid (77% total, 32% extremely) | |



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Appendix



➤ Survey Background

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 2016 in comparison to calendar year 2015.



➤ Survey 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 2016, a total of 4,972 screener interviews were conducted resulting in 1,608 surveys with past four 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 2016 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 2016, excluding holidays, were:
 - Q1: January 5 – March 28
 - Q2: April 4 – July 2
 - Q3: July 4 – October 2
 - Q4: October 3 – December 22