



Edmonton
Transit
Service



Executive Summary

2025 Rider Research Program



Prepared by



CANADIAN RESEARCH
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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 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 transit.



Overall Satisfaction with ETS Services: 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 rider 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 transit 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 (3,074 responses in 2025)

Monthly data collection through online panel surveys

- **Monthly Surveys:** Feedback was collected monthly from riders of ETS’s conventional transit services, including buses, Light Rail Transit (LRT), and On Demand Transit. Respondents to the survey are residents of the Edmonton area who used ETS services in the three months prior to completing the survey.

DATS Riders (Dedicated Accessible Transit Service):



n=288 DATS riders/year

Annual data collection online and via telephone

One qualitative research studies involving 27 participants in total

- **Annual Survey with DATS:** 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.
- **Deep-Dive Qualitative Research:** Prior to the 2025 annual survey, ETS conducted one qualitative research study with DATS riders to gain a deeper understanding of their experiences.

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 2025, **3,074** surveys were completed. Monthly, quarterly and annual quotas are calibrated to ensure that the final sample of respondents and corresponding demographics are inclusive of the various demographics within the Edmonton area. Data was collected using an online panel* to understand riders’:

- Trip characteristics, including reasons for choosing transit, how they travel to their first stop, and trip purpose;
- Key satisfaction metrics, including overall transit experience and value for money, and the key drivers of satisfaction; and
- Satisfaction with transit on various aspects along the journey and amongst different groups.

Conventional Rider Trip Characteristics

- In 2025, affordability (40%) and convenience (38%) emerged as the leading reasons riders rely on transit, alongside a consistent top factor from 2024—the elimination of parking costs (37%).
- The majority of riders continue to walk (69%) to their first stop or station before boarding transit.
- Commuting to or from work (25%) remains the most frequently mentioned purpose for taking transit.

Key Satisfaction Metrics

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.



Overall Transit Experience : 71% were somewhat satisfied, satisfied, or extremely satisfied (73% in 2024, n=3,000).

How satisfied are you with your overall transit experience?



Satisfaction With Value For Money: 64% were somewhat satisfied, satisfied, or extremely satisfied (66% in 2024, n=3,000).

How satisfied are you with the value for money received from your fare?

**Transit riders aged 15+ residing in Edmonton census metropolitan area (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 (n=3,074) has an estimated margin of error (which measures sampling variability) of +/- 2.3%, 99 times out of 100.*



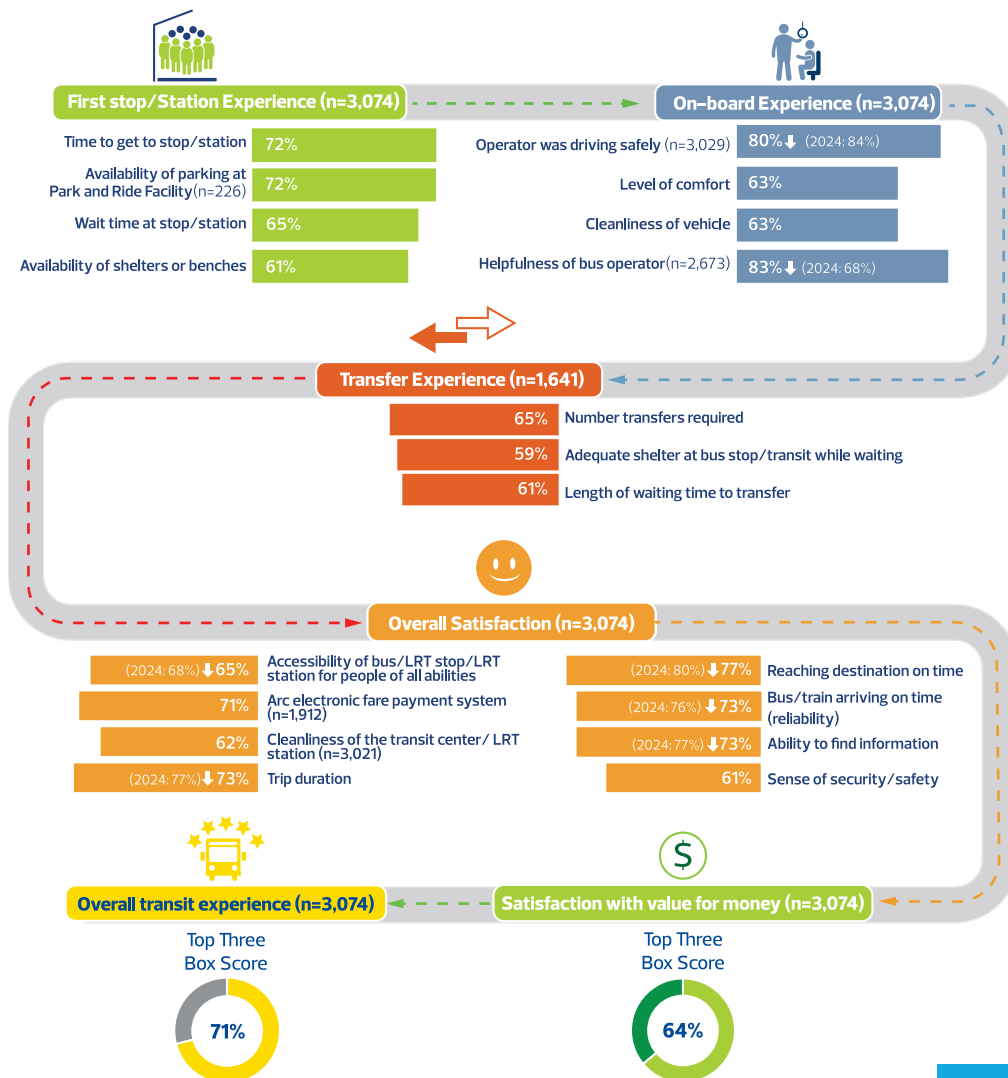
Satisfaction Along the Transit Journey

This infographic summarizes riders' satisfaction scores in 2025 along the transit journey where respondents were asked: "how satisfied are you with ETS...?" along various aspects of the journey.

In 2025, riders were least satisfied with the sense of safety and security (61%), the cleanliness of the vehicle (61%) and length of waiting time to transfer (61%), while they were more most satisfied with the safe driving of operators (81%) and reaching their destinations on time (77%).

Overall, rider satisfaction in 2025 was consistent with 2024 attributes in the first stop/station, overall experience and value for money, however all other stages of the journey faced a decline in certain attributes, as shown in the chart below.

Note that if no arrow appears, the difference from 2024 is not statistically significant.* Sample size is smaller at the 'transfer experience' stage, as only respondents who had a transfer during their most recent trip were asked about it.



* Based on a 99% confidence significance testing.

Overall Satisfaction with Transit Among Various Groups

Overall satisfaction differ by demographic groups in 2025.

- Satisfaction was higher among the following rider groups compared to the overall score of 71%:
 - Older adults, 65 years or older (88%)
 - Riders who have higher annual income (\$100,000+) (78%)
- Satisfaction was lower among the following rider groups, which are consistent with findings from 2024:
 - Youth and young adults, those aged 15 to 34 (61%)
 - Low-income (<\$30,000) earners (63%) and students (61%)
 - Riders with disabilities (59%) and 2SLGBTQIA+ riders (59%)
- Consistent with 2024, satisfaction remained highest among commuters (76%), who primarily use transit for work or school. Notably, all-purpose riders (64%), who rely on transit for a wider range of trips, reported lower satisfaction levels in 2025.



Key Findings from Conventional Rider Monthly Survey

Overall satisfaction remained stable in 2025, with about 71% of riders reporting they were satisfied with the service. The following attributes are key drivers of satisfaction and present an opportunity for enhancement.



Safety - 61% of respondents reported feeling safe during their transit journey, unchanged from 2024. This attribute consistently receives the lowest ratings among all service aspects.

Riders' sense of safety and security was influenced the most by their experiences as they waited to board their first transit vehicle (bus or LRT) and while on-board, consistent with 2024.



Onboard comfort - 65% of respondents reported being satisfied with the level of comfort, consistent with 2024. Riders define comfort in terms of vehicle cleanliness, safety and security measures, and seating quality, including legroom and seat comfort.



Value for money - While satisfaction for value remained stable at 64%, satisfaction amongst all-purpose riders specifically, decreased in 2025. Overall riders' appreciated the value associated with the various Arc Card products, however this attribute was a key driver for both all-purpose and occasional riders.



Shelters - The adequacy of shelters at bus stops or stations while waiting for transfer is a primary opportunity to increase satisfaction (63%), especially among riders who take transit for work or school.





Dedicated Accessible Transit Service (DATS)



Qualitative Research With DATS Riders

The DATS Annual Survey, conducted as part of the ETS Rider Research Program, gathers feedback from DATS riders and their caregivers to assess satisfaction across key touchpoints of their most recent trip. In 2025, a qualitative research phase took place prior to the annual survey. The objectives of the qualitative research were to understand DATS riders' and caregivers' day-to-day experiences with the service in greater depth, including how different vehicles meet their needs, the barriers they face in using the service, and their reactions to possible service enhancements.

Feedback and recommendations from this study guided updates to the annual survey as well as informed recommendations to enhance DATS and the overall transportation experience for people with limited ability to ride conventional transit in Edmonton.

Methodology

Between July 14 and August 4, 2025, a total of 27 riders and caregivers, including parents and guardians, participated across four focus groups and five interviews. The focus groups were designed to understand experiences across different ridership frequency levels (high, medium, and low), and an exclusive group with non-ambulatory riders who face unique mobility needs and the more limited availability of DATS service vehicles. Participants who fit multiple categories were ultimately assigned to the group that best matched their availability.

Key Learnings

Overall, participants expressed strong appreciation for DATS as an accessible transit option that supports their independence and daily mobility, noting they will continue to rely on the service. Newer buses were valued for their stability, comfort, and safety features, while minivans were often preferred for more direct routes and shorter travel times.

Participants identified the following areas for improvement that could further enhance their experience, including:

- **Trip Booking:** Many participants described the booking system as restrictive and unreliable, citing the three-day advance booking window limit, long telephone hold times, and booking errors can make planning trips stressful.
- **Trip Duration:** Although DATS aims for trip duration under 90 minutes, riders frequently reported journeys lasting two hours or more due to perceived inefficient routing.
- **Trip Routing:** Riders expressed concerns with some routes being illogical and inefficient, leading to long travel times and ineffective trip pairings.



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 November 6 and November 27, 2025. In total, **288** respondents participated in the survey; 75% were riders who had used DATS in the prior 12 months and 25% were caregivers who either had booked and/or accompanied riders on their trips.

Respondents were asked about:

- Their usage and perceptions of DATS;
- Satisfaction with DATS on 20 aspects along the transit journey, including their overall experience; and
- Suggestions for improvements

The results of the study were accurate with a margin of error of +/- 5.6%, 19 times out of 20.

DATS Riders Trip Characteristics

A majority of respondents (76%) continue to use DATS as their primary mode of transportation, an increase from 2024. While around half of respondents continue to view DATS as safe (60%), affordable (56%), reliable (48%), and comfortable (45%), perceptions in each of these areas have increased compared to 2024.

Over a quarter (28%) of respondents indicated that they, or the DATS rider they book for, would not have been able to complete their most recent trip without the service.

Overall Satisfaction Metrics



Overall DATS Experience : 91% were somewhat satisfied, satisfied, or extremely satisfied (87% in 2024, n=320).

How satisfied are you with your overall DATS experience?

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.

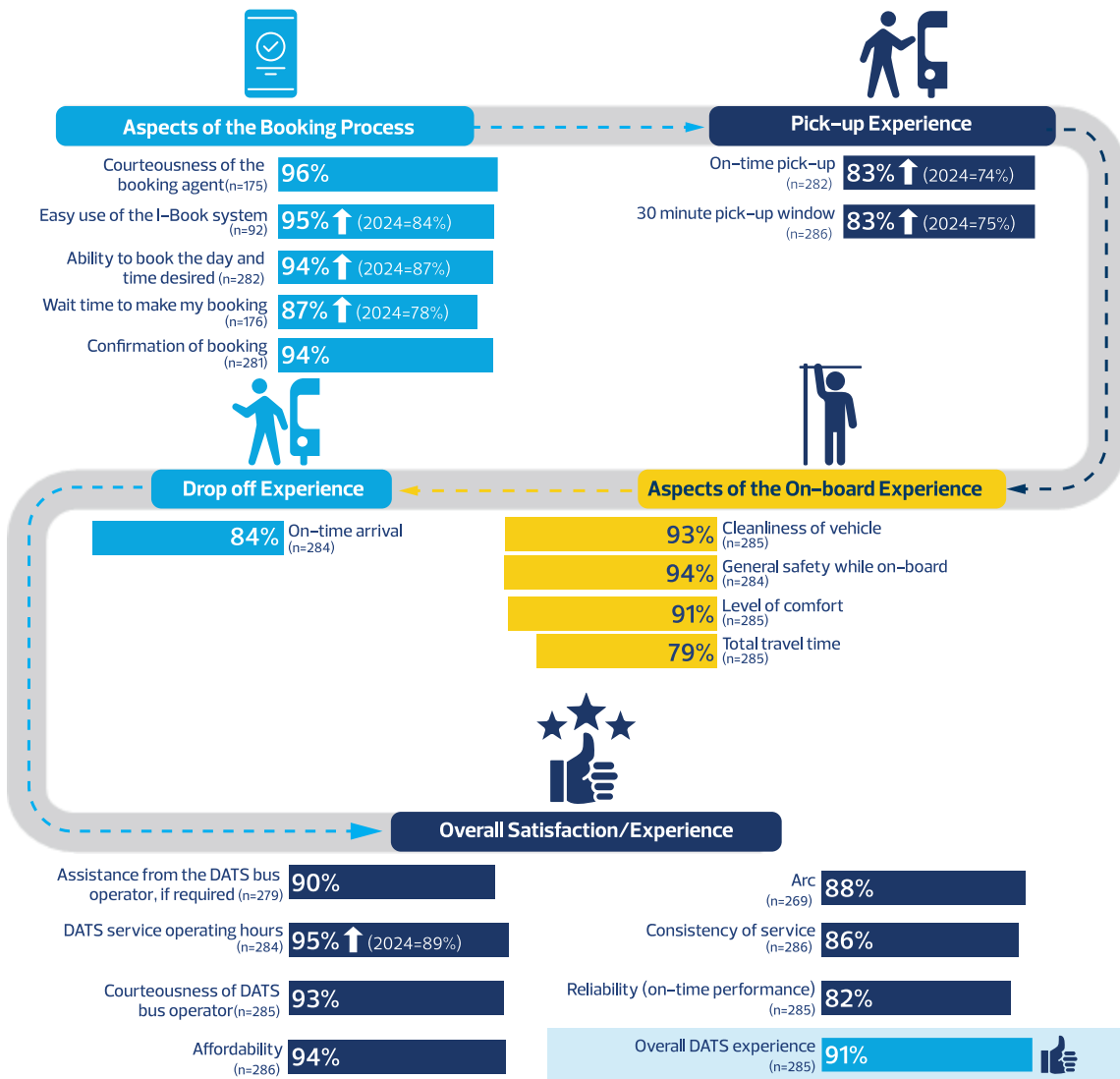


Satisfaction Along the Transit Journey (DATS)

This infographic summarizes riders' satisfaction scores in 2025 along the transit journey where respondents were asked: how satisfied are you with the following aspect of DATS?

An upward or downward arrow is shown when the difference from 2024 is statistically significant, along with the corresponding percentage point increase or decrease in brackets. If no arrow appears, the difference from 2024 is not statistically significant. * Overall, satisfaction with DATS across most aspects of the journey remained high, with many measures scoring above 90% and increased in 2025.

Sample sizes vary across aspects as questions are non-mandatory and those who selected the option 'don't know/unsure' were excluded from analysis.

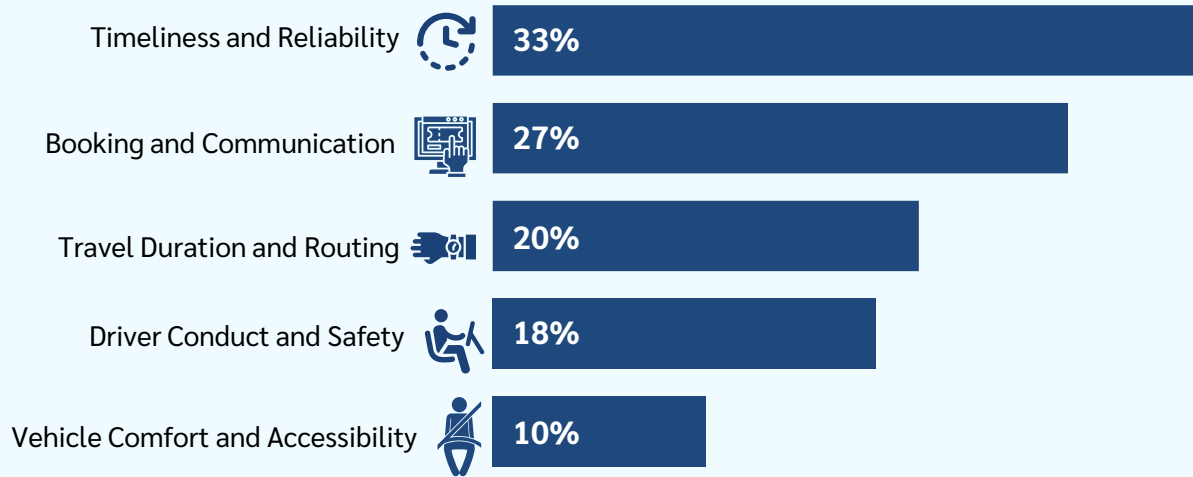


* Based on a 95% confidence significance testing.

Suggestions for Improvement

Of the survey respondents who used DATS and provided suggestions for improvement (n=122), the most commonly mentioned theme was related to timeliness and reliability (33%), consistent with 2024 results. Comments in this category focused on late pick-ups, unreliable scheduling, long wait times, and inconsistent arrival or drop-off times. Another common suggestion related to booking and communication (27%) which included comments on difficulties with the booking process, challenges using the online and phone systems, limited communication about ride status, and concerns about responsiveness.

Suggestions for Improvement (n=122)





Non-Riders



Non-Riders Annual Survey

The 2025 ETS Non-Rider Survey was conducted from November 5 to December 4, 2025. The objective of this research was to understand why individuals stopped using transit and to identify potential service improvements that could encourage them to return.

Data was collected from 400 respondents through an online panel*. The survey included individuals who last used ETS services between November 2024 and December 2025, used transit infrequently (once a month or less), or those who had not used ETS in the past 4 years.

Respondents were asked about:

- Experience and perceptions of transit;
- Main reason for stopping transit use; and
- Suggestions for improvements to influence future usage.

**Non-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 (n=400) has an estimated margin of error (which measures sampling variability) of +/- 6.4%, 99 times out of 100.*



Overall Non-riders Perceptions of Transit

Although current transit use was limited among non-riders, 65%* reflected positively on their overall past experience with the service, consistent with 2024 results.

- Three quarters (74%)* were satisfied with the reliability of transit when they last used it, consistent with 2024 results.
- Half (53%) had used transit previously to avoid parking costs and one-third (32%) recalled it as being convenient, consistent with 2024 results.
- Less than one in five (16%) indicated that ETS services was previously their only means of transportation.

Main Reasons for Non-usage of Transit



Life changes (64%): Discontinued transit use was due to a change in circumstances, including choosing to drive or having acquired a vehicle or they had only used it previously based on circumstance.



Personal Safety (24%): Non-riders cited security concerns as a reason for stopping their use of transit.



Limited Options/Scheduling (21%): One in five (21%) non-riders pointed to service delivery 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 Transit



Improve Safety and Security (47%)



Fare Reduction (28%)



More Direct Service (23%)



Add More Routes (23%)

*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: Demographics



Conventional Riders Survey Respondent Profile (n=3,074)

In which of the following age categories do you fall?

Age Group	Percent
15 - 24 years	17%
25 - 34 years	23%
35 - 44 years	25%
45 - 54 years	15%
55 - 64 years	12%
65 - 74 years	6%
75 years or older	2%
Prefer not to answer	<1%

Where do you currently reside?

Municipality	Percent
City of Edmonton	91%
St. Albert	3%
Sherwood Park	2%
Leduc	1%
Fort Saskatchewan	1%
Spruce Grove	1%
Beaumont	1%

Do you have children or grandchildren, 18 years old or under, living at home?

Parental Status	Percent
Yes	35%
No	63%
Prefer not to answer	2%

Do you identify as any of the following?
[Select all that apply]

Identity	Percent
Racialized minority	21%
Persons with disabilities	15%
Born outside of Canada	15%
New to Canada (less than 1 year)	2%
New to Canada (1-5 years)	8%
Indigenous	9%
2SLGBTQIA+	7%
Other	1%
None of the above	38%
Prefer not to answer	3%

What gender do you identify as? [Select all that apply]

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

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

Employment Status	Percent
Employed full time (30 hours or more per week)	49%
Employed part time (less than 30 hours per week)	14%
Retired	9%
Student	10%
Not employed	7%
Unable to work	6%
Stay at home parent	3%
Prefer not to answer	2%

Indicate which of the following represents your total household income per year before taxes.

Household Income	Percent
Under \$20,000	11%
\$20,000 to under \$29,999	10%
\$30,000 to under \$39,999	8%
\$40,000 to under \$49,999	9%
\$50,000 to under \$59,999	9%
\$60,000 to under \$74,999	10%
\$75,000 to under \$99,999	14%
\$100,000 to under \$149,999	13%
\$150,000 or more	10%
Prefer not to answer	6%

Are you currently attending school?

Student Status	Percent
Not currently a student	77%
Yes, Full time postsecondary student	8%
Yes, Part time postsecondary student	4%
Yes, High school student	5%
Yes, Student in vocational college	3%
Prefer not to answer	3%



DATS Respondent Profile (n=288)

In which of the following age categories do you fall?

Age Group	Percent
18 - 64 years	51%
65 - 74 years	22%
75 years or older	25%
Prefer not to answer	1%

Do you have children, 18 years old or under, living at home?

Parental Status	Percent
Yes	7%
No	87%
Prefer not to answer	6%

Are you a member of any of the following? [Select all that apply]

Identity	Percent
Racialized / visible minority	12%
Persons with disabilities	69%
Indigenous	3%
New to Canada (less than 1 year)	0%
New to Canada (1-5 years)	<1%
Born outside of Canada	15%
2SLGBTQIA+	2%
Other	0%
None of the above	13%
Prefer not to answer	7%

What gender do you identify as? [Select all that apply]

Gender	Percent
Woman	63%
Man	35%
Non-binary	0%
Transgender	0%
Two-spirit	0%
Prefer not to answer	2%
Woman	63%

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

Employment Status	Percent
Employed full time (30 hours or more per week)	6%
Employed part time (less than 30 hours per week)	9%
Not employed	7%
Unable to work	26%
Stay at home parent	<1%
Retired	45%
Prefer not to answer	6%

Indicate which of the following represents your total household income per year before taxes.

Household Income	Percent
Under \$20,000	17%
\$20,000 to under \$29,999	22%
\$30,000 to under \$39,999	4%
\$40,000 to under \$49,999	5%
\$50,000 to under \$59,999	2%
\$60,000 to under \$74,999	3%
\$75,000 to under \$99,999	2%
\$100,000 to under \$149,999	2%
\$150,000 or more	1%
Prefer not to answer	42%

Are you currently attending school?

Student Status	Percent
Not currently a student	92%
Yes, High school student	0%
Yes, Full time postsecondary student	1%
Yes, Part time postsecondary student	1%
Yes, Student in vocational college	<1%
Prefer not to answer	6%



Non-Rider Respondent Profile (n=400)

In which of the following age categories do you fall?

Age Group	Percent
15 - 17 years	1%
18 - 24 years	14%
25 - 34 years	20%
35 - 44 years	23%
45 - 54 years	18%
55 - 64 years	12%
65 - 74 years	10%
75 years or older	3%
Prefer not to answer	0%

Where do you currently reside?

Municipality	Percent
City of Edmonton	78%
Sherwood Park	8%
Spruce Grove	5%
St. Albert	4%
Leduc	3%
Beaumont	1%
Fort Saskatchewan	1%

Do you have children or grandchildren, 18 years old or under, living at home?

Parental Status	Percent
Yes	38%
No	62%

Are you a member of any of the following? [Select all that apply]

Identity	Percent
Persons with disabilities	15%
Racialized minority	15%
Indigenous (as defined in Canada as First Nations, Métis or Inuit)	10%
2SLGBTQIA+	7%
New to Canada (1-5 years)	3%
New to Canada (less than 1 years)	1%
Other	0%
None of the above	56%
Prefer not to answer	4%

What gender do you identify as? [Select all that apply] (

Gender	Percent
Woman	59%
Man	38%
Non-binary	3%
Transgender	2%
Two-spirit	1%
Another gender not listed above	<1%
Prefer not to answer	1%

Indicate which of the following represents your total household income per year before taxes.

Household Income	Percent
Under \$20,000	8%
\$20,000 to under \$29,999	6%
\$30,000 to under \$39,999	5%
\$40,000 to under \$49,999	10%
\$50,000 to under \$59,999	8%
\$60,000 to under \$74,999	10%
\$75,000 to under \$99,999	16%
\$100,000 to under \$149,999	21%
\$150,000 or more	13%
Prefer not to answer	5%

Are you currently attending school?

Student Status	Percent
Not currently a student	82%
Yes, high school student	3%
Yes, part time postsecondary student	3%
Yes, full time postsecondary student	5%
Yes, student in vocational college	2%
Prefer not to answer	6%

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

Employment Status	Percent
Employed full time (30 hours or more per week)	52%
Employed part time (less than 30 hours per week)	12%
Not employed	11%
Retired	15%
Stay at home parent	3%
Unable to work	6%
Prefer not to answer	3%





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Pivotal Research Inc. respectfully acknowledges that our office is headquartered on the traditional and ancestral land of the Nêhiyawak (Cree), Anishinaabe (Saulteaux), Niitsitapi (Blackfoot), Métis, Dene and Iyâhé Nakoda (Nakoda Sioux) in Treaty 6 Territory and Métis Region 4.

