

TORONTO TRANSIT COMMISSION REPORT NO.

MEETING DATE: February 24, 2014

SUBJECT: Customer Satisfaction Survey – 2013 Results

INFORMATION ITEM

RECOMMENDATION

It is recommended that the Board receive a presentation *Customer Satisfaction Survey – 2013 Results*, for information. The presentation provides the Board with the Customer Satisfaction Survey results for 2012 and 2013.

February 10, 2014
1-58
Presentation



CUSTOMER SATISFACTION SURVEY – 2013 RESULTS

TTC Board – February 24, 2014





- Background and methodology
- Respondent profile
- Overview of results
- Next steps





- Measure customer satisfaction with TTC service performance on a number of key attributes
- Track changes in customer satisfaction over time
- Use results as input to assess current service/initiatives, and to identify priorities for future action





- Respondents rate quality of key aspects of TTC service, and also for each mode they used on their last trip
- 12 station and 10 vehicle attributes:

Station:
Cleanliness
Ease of hearing announcements
Helpfulness of announcements
Maps/signs at station
Personal safety in station
Ease of getting to platform
Ease of buying token / ticket
Value for Money
Platform crowding
Station staff available when needed
Help and appearance of staff around station
Help and appearance of collector booth

Vehicle:
Cleanliness
Ease of hearing announcements
Helpfulness of announcements
Maps/information
Personal safety on vehicle
Crowding
Length of journey
Length of time waited for vehicle
Smoothness of ride
Help and Appearance of Operator



BACKGROUND AND METHODOLOGY



Method 10 minute telephone survey

Respondents City of Toronto residents
From 13 years to 70 years of age
TTC user at least once every few weeks or more frequently

Timing Has been conducted each Quarter since Q1 2012

Sample Size 1000 respondents for each Quarter
(except for Q1 2012 = 551)





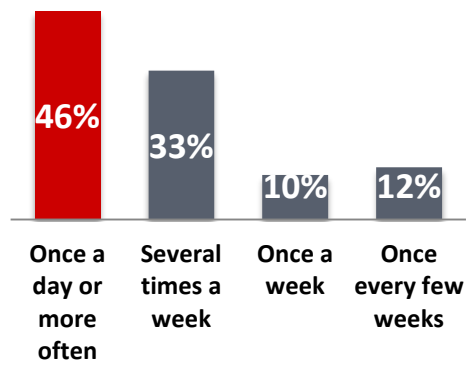
RESPONDENT PROFILE



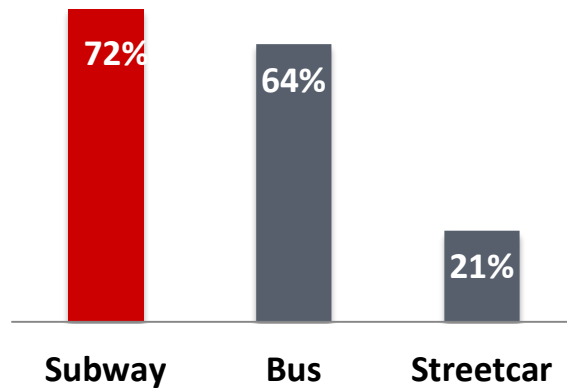
RESPONDENT PROFILE – Q4 2013



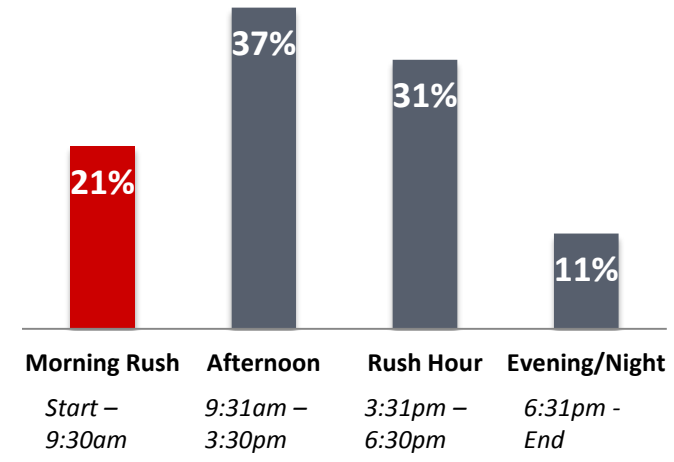
FREQUENCY OF TTC USAGE



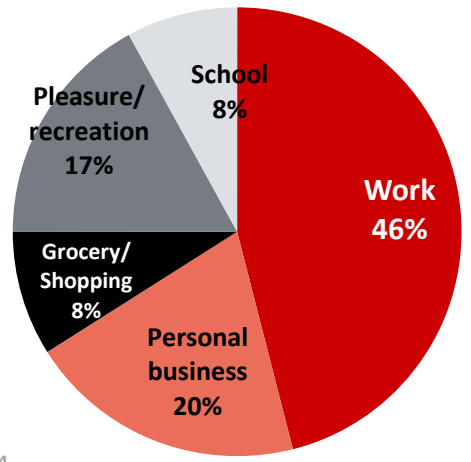
MODE OF TRANSPORTATION OF MOST RECENT TRIP ON TTC



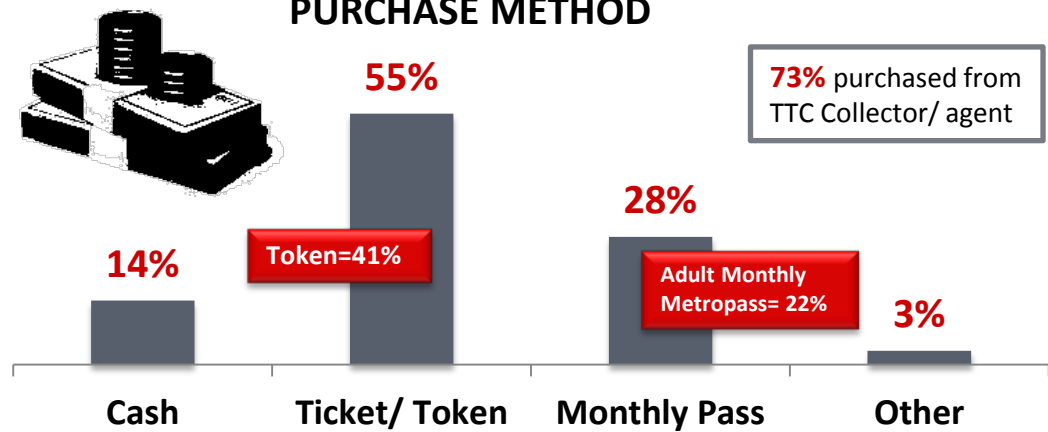
TIME OF DAY OF LAST TRIP



PURPOSE OF LAST TTC TRIP



PURCHASE METHOD





SUMMARY OF RESULTS





Overall, Customer Satisfaction has remained consistent over the last year:

- 72% in Q4 2012 vs. 74% in Q4 2013

Several areas have improved significantly from Q4 2012 to Q4 2013, including:

- Cleanliness of the subway station
- Wait time for subway trains
- Cleanliness and freedom from litter inside the subway trains and buses
- Level of crowding in bus
- Subway station staff available for help
- Duration of trip for bus

There were no significant declines for any of the subway, bus, or streetcar service attributes from Q4 2012 to Q4 2013.





Areas of highest customer satisfaction include (+ 80% for Q4 2013):

- Personal safety while travelling on subway, bus, or streetcar
- Quality of subway announcements at each stop
- Ease of getting to subway train platform
- Appearance of bus operator
- Maps and information inside the subway train

Areas of lowest customer satisfaction include ($\leq 60\%$ for Q4 2013):

- Frequency and clarity of announcements about subway delays
- Availability, helpfulness and appearance of subway station staff
- Level of crowding inside subway train/streetcar
- Wait time for bus/streetcar
- Maps and information inside bus/streetcar

Perceived value for money has remained consistent, with $\approx 90\%$ rating values as “average” or better.

Over 70% of respondents are proud of the TTC and what it means to Toronto.





RATINGS OF OVERALL TTC SERVICE

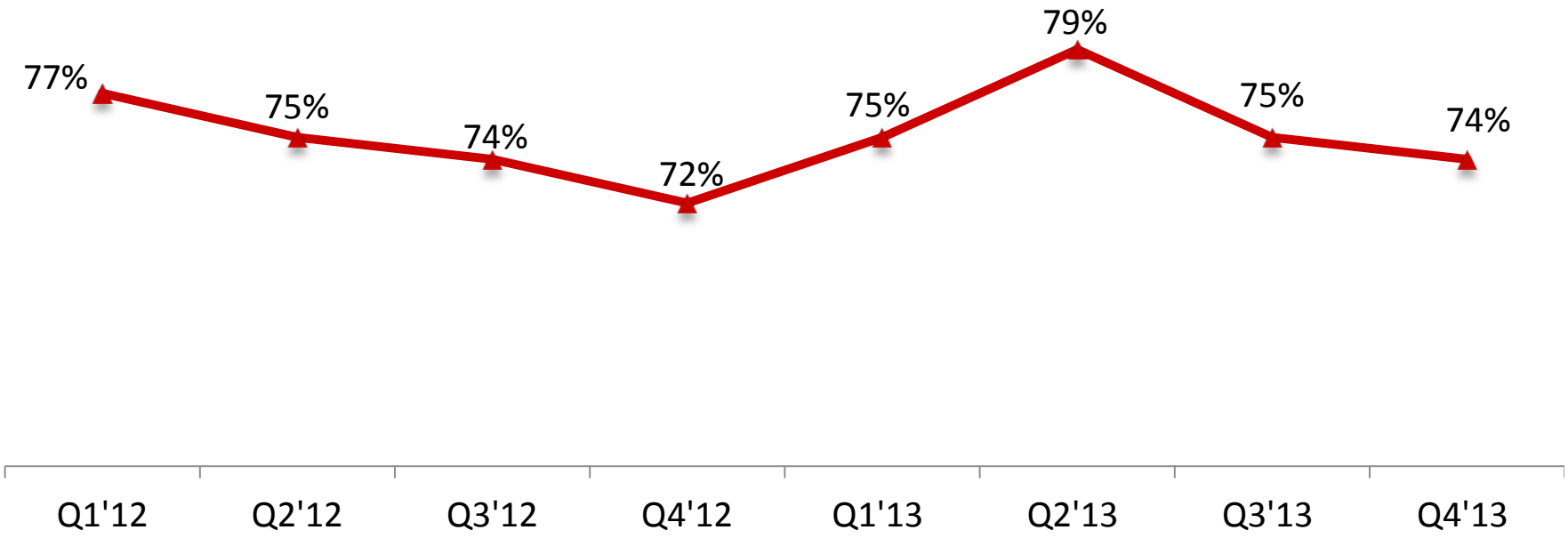


CUSTOMER SATISFACTION OVER TIME



Customer Satisfaction : 2012-2013

**Q1'12-Q4'13
Average Score: 75%**



▲ Customer Satisfaction (Good/Excellent ratings*)

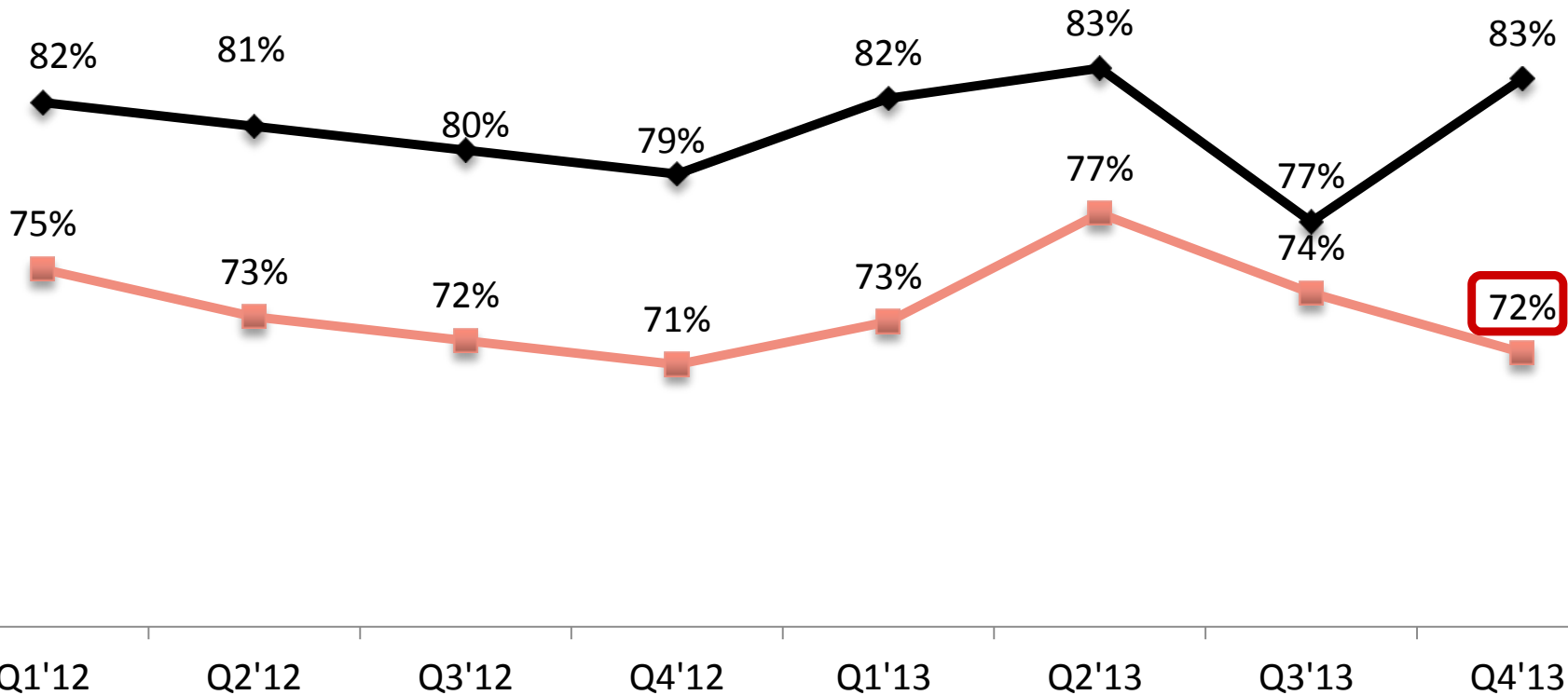
* Good/Excellent ratings refer to scores of 7-10 on a 1-10 scale.

Q10. How satisfied were you overall with the quality of the TTC's service on the last TTC trip you took, on a scale of 1 to 10 where 10 is extremely satisfied and 1 is extremely dissatisfied? How would you rate the service on a scale of 1 to 10 for your last trip?



GAP IN SATISFACTION BETWEEN FREQUENT AND OCCASIONAL RIDERS OVER TIME

**Good/Excellent Satisfaction Ratings* Based on Frequency of TTC Usage:
2012-2013**



◆ Occasional: Once a week or less ■ Frequent: Daily to Several Times a week

□ = sig. higher/ lower than other subgroups

↑ ↓ = sig. higher/ lower than other waves at .95

* Good/Excellent ratings refer to scores of 7-10 on a 1-10 scale.

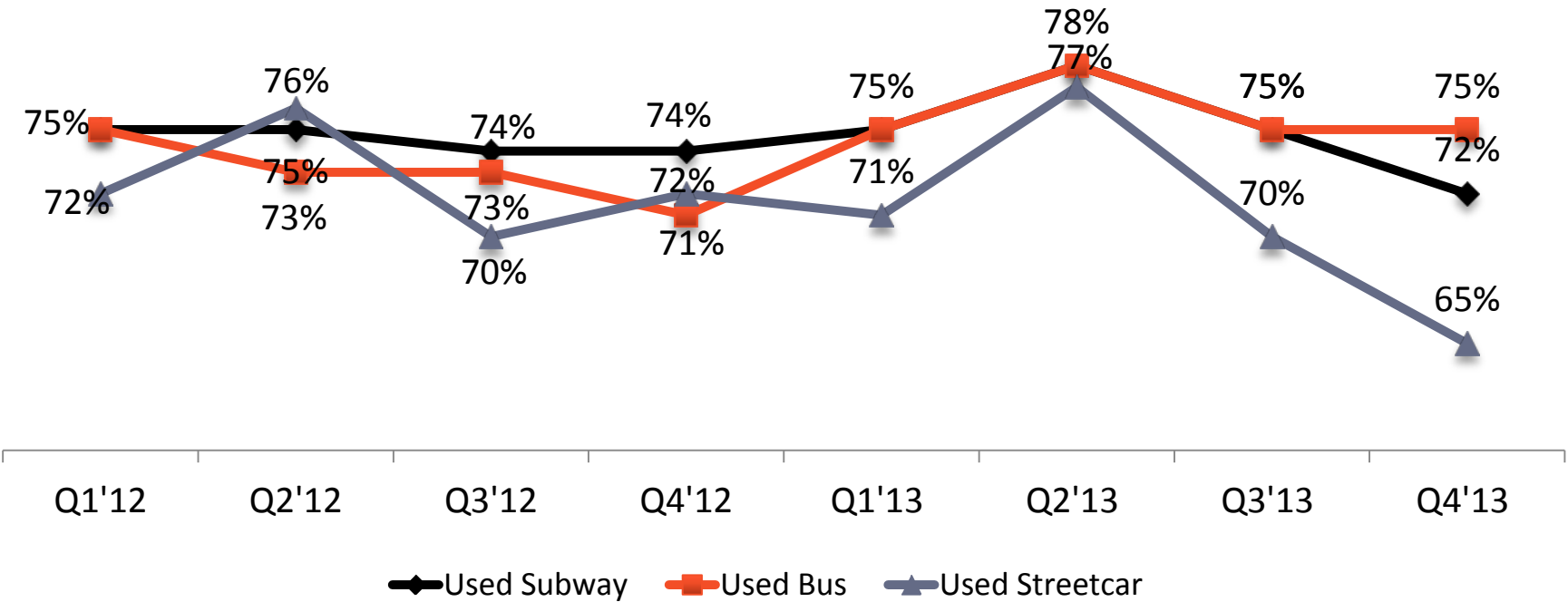
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SATISFACTION BY MODES



Good/Excellent Satisfaction Ratings* Based on Modes: 2012-2013



* Good/Excellent ratings refer to scores of 7-10 on a 1-10 scale.

Q10. How satisfied were you overall with the quality of the TTC's service on the last TTC trip you took, on a scale of 1 to 10 where 10 is extremely satisfied and 1 is extremely dissatisfied? How would you rate the service on a scale of 1 to 10 for your last trip?





KEY RESULTS



SERVICE DELIVERY: SUBWAY



- Customer satisfaction with the subway service has improved significantly in several areas:

Service Attributes*	Q4'12	Q4'13
Ease of getting to train platform	78%	83%
The length of time you waited for the vehicle	70%	78%
Cleanliness of the subway station	66%	77%
Cleanliness and freedom from litter inside the vehicle	69%	76%
The maps and information inside the vehicle	75%	80%
Ease of buying token/ticket	69%	74%
Station staff available for help	44%	52%

* Good/Excellent ratings (scores of 7-10 on a 1-10 scale).

Q11. I'd like to ask you about the subway you used during your last TTC trip. Again, using the same 10 point scale where 1 means extremely dissatisfied and 10 means extremely satisfied, how satisfied were you with ____ [ASK FIRST ITEM]? How about ____ [ASK NEXT ITEM]?



SERVICE DELIVERY: BUS AND STREETCAR



- While there were also some positive changes in bus service delivery over the last year, there were no significant improvements for the streetcar service.

Service Attributes*	Q4'12	Q4'13
Bus		
The length of time your bus trip took	74%	79%
The cleanliness and freedom from litter inside the vehicle	66%	71%
The level of crowding inside the vehicle	53%	61%
The maps and information inside the vehicle	50%	55%

* Good/Excellent ratings (scores of 7-10 on a 1-10 scale).

Q12. I'd like to ask you about the bus you used during your last TTC trip. Again, using the same 10 point scale where 1 means extremely dissatisfied and 10 means extremely satisfied, how satisfied were you with ____ [ASK FIRST ITEM]? How about ____ [ASK NEXT ITEM]?





- There were no significant declines for any of the subway, bus, or streetcar service attributes from Q4 2012 to Q4 2013.





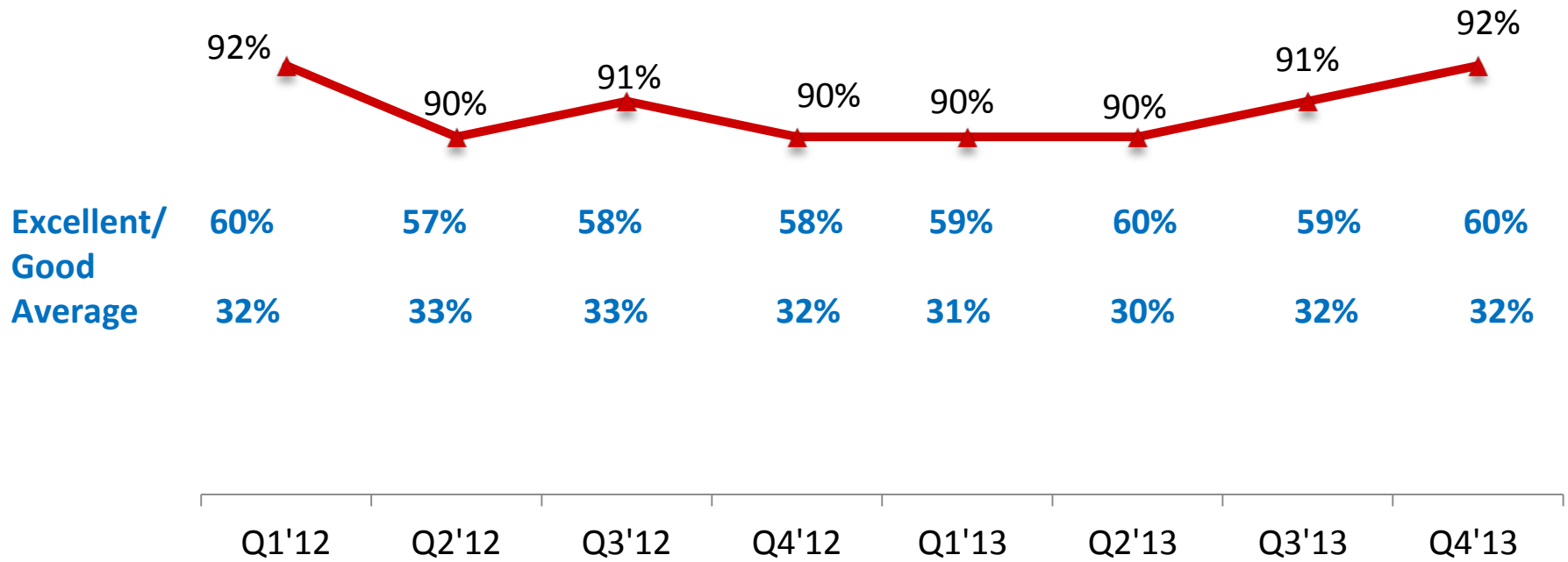
OTHER KEY RESULTS



VALUE FOR MONEY OVER TIME



Perceptions of Value for Money: 2012-2013



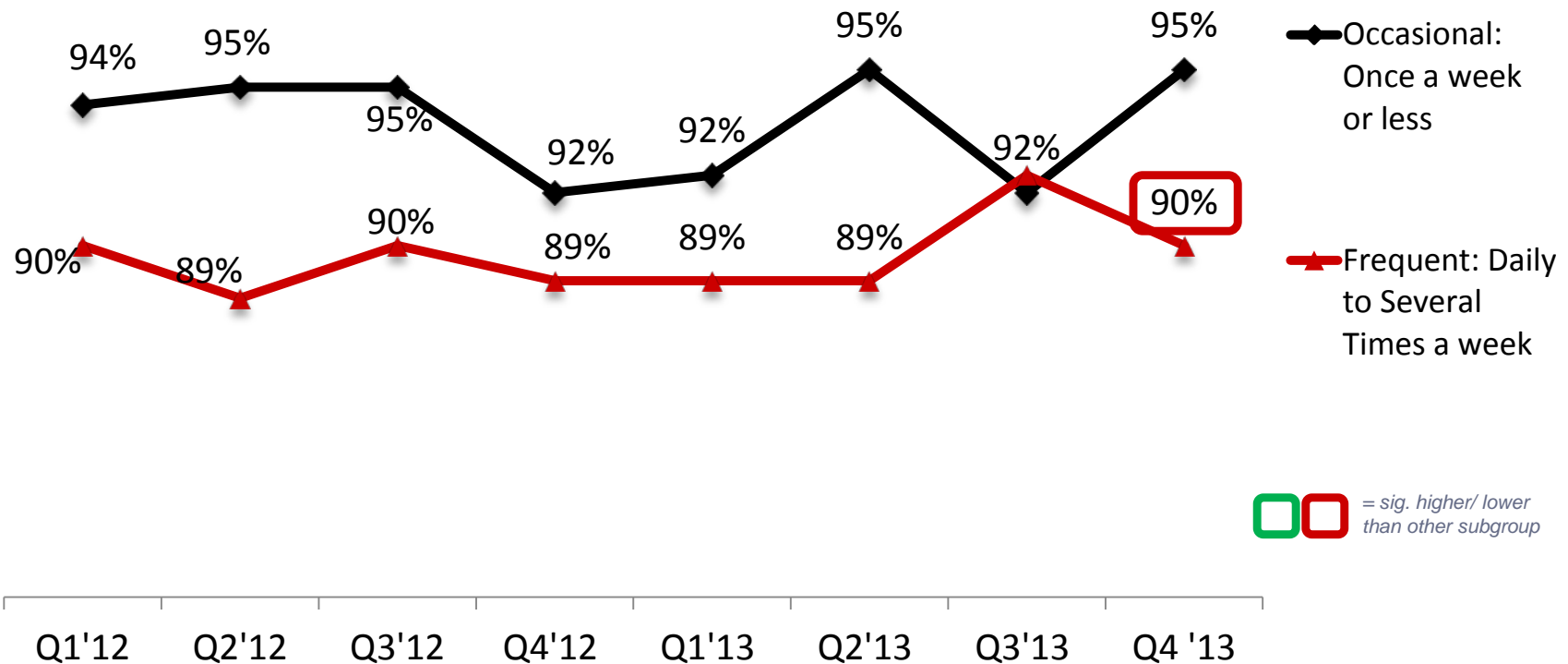
▲ Value for Money (Excellent/Good/Average)



OCCASIONAL USERS PERCEIVE HIGHER VALUE FOR MONEY THAN FREQUENT USERS



Value for Money* Based on Frequency of TTC Usage: 2012-2013



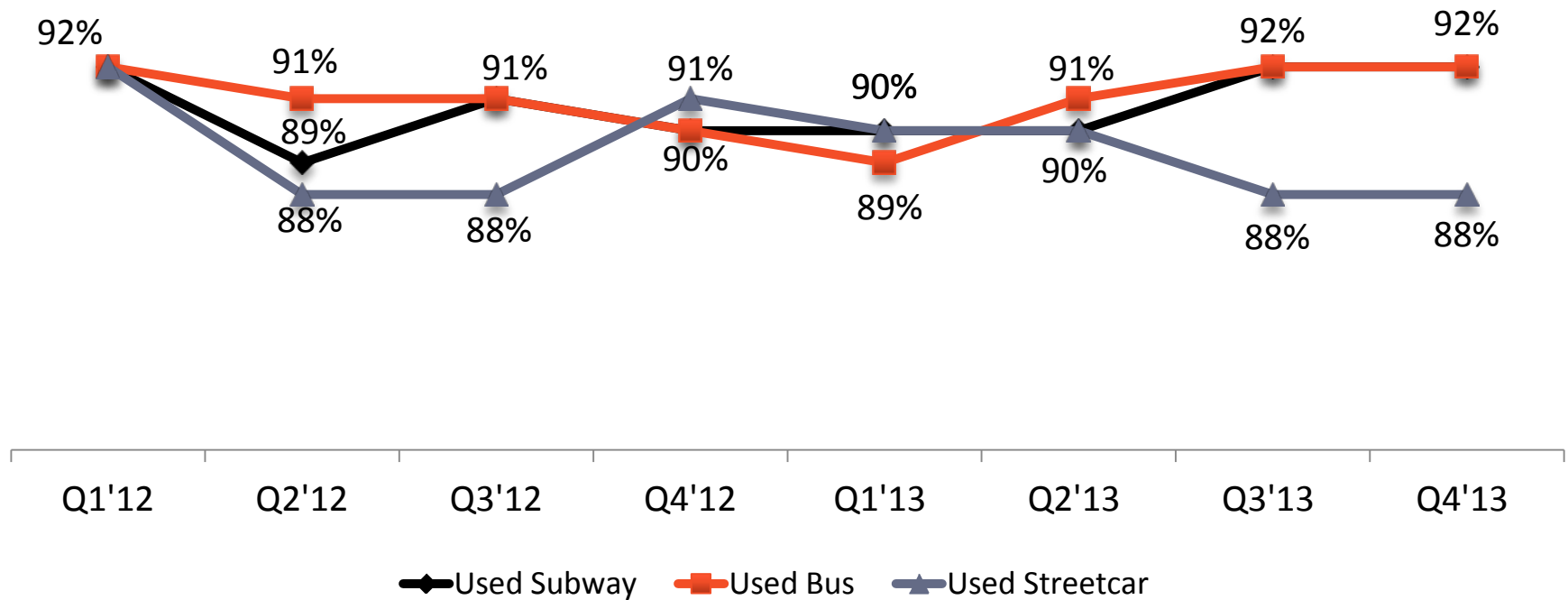
*Excellent/Good/Average Value for Money



VALUE FOR MONEY BY MODES



Value for Money* Based on Modes: 2012-2013



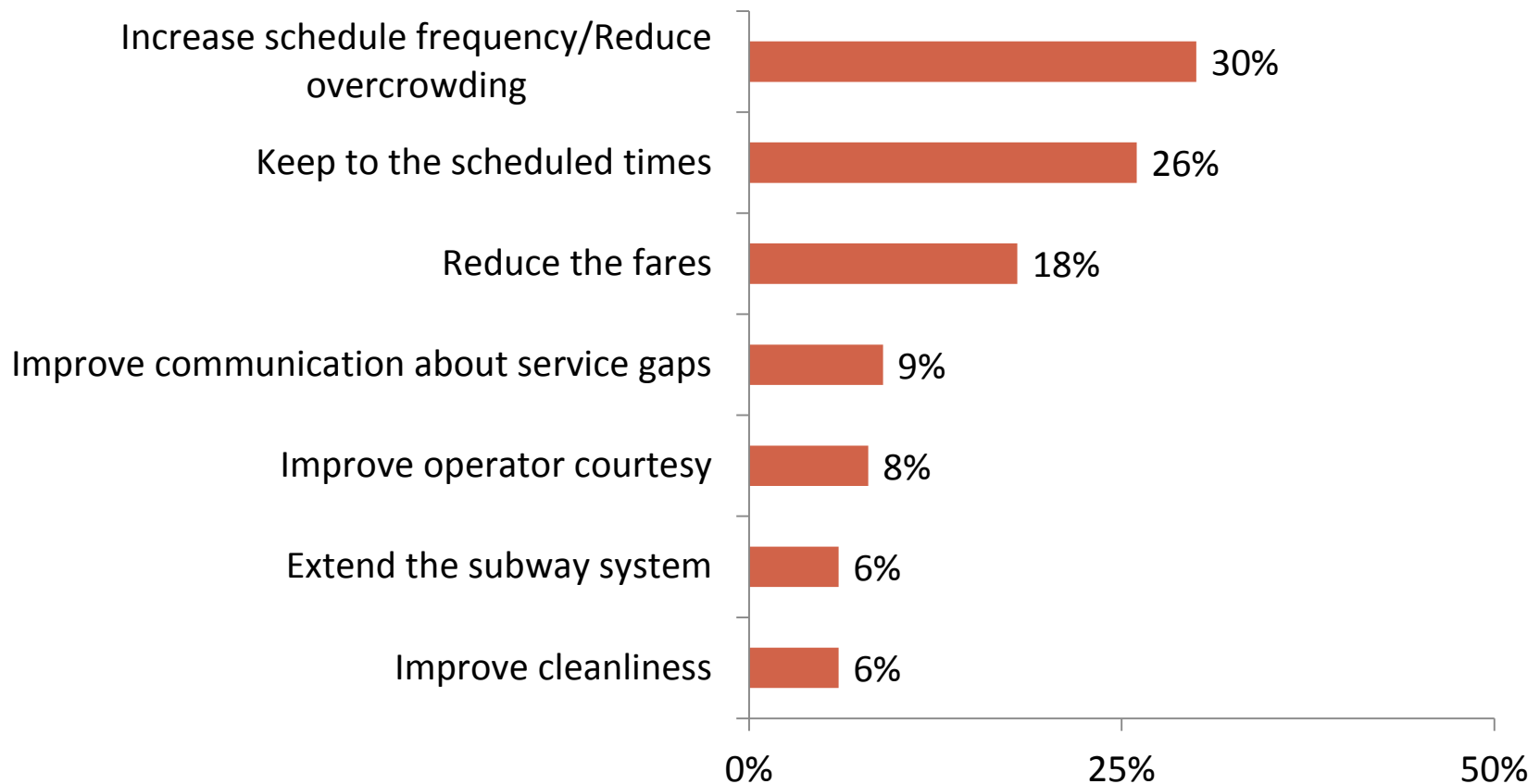
*Excellent/Good/Average Value for Money





Customers felt they would receive better value for money if the schedule frequency was increased, if the TTC kept to the scheduled times, and if fares were reduced.

How can the TTC provide better value for money?*



* Categories with less than 6% responses are not shown in this chart.
Q17A. How could the TTC provide better value for money?

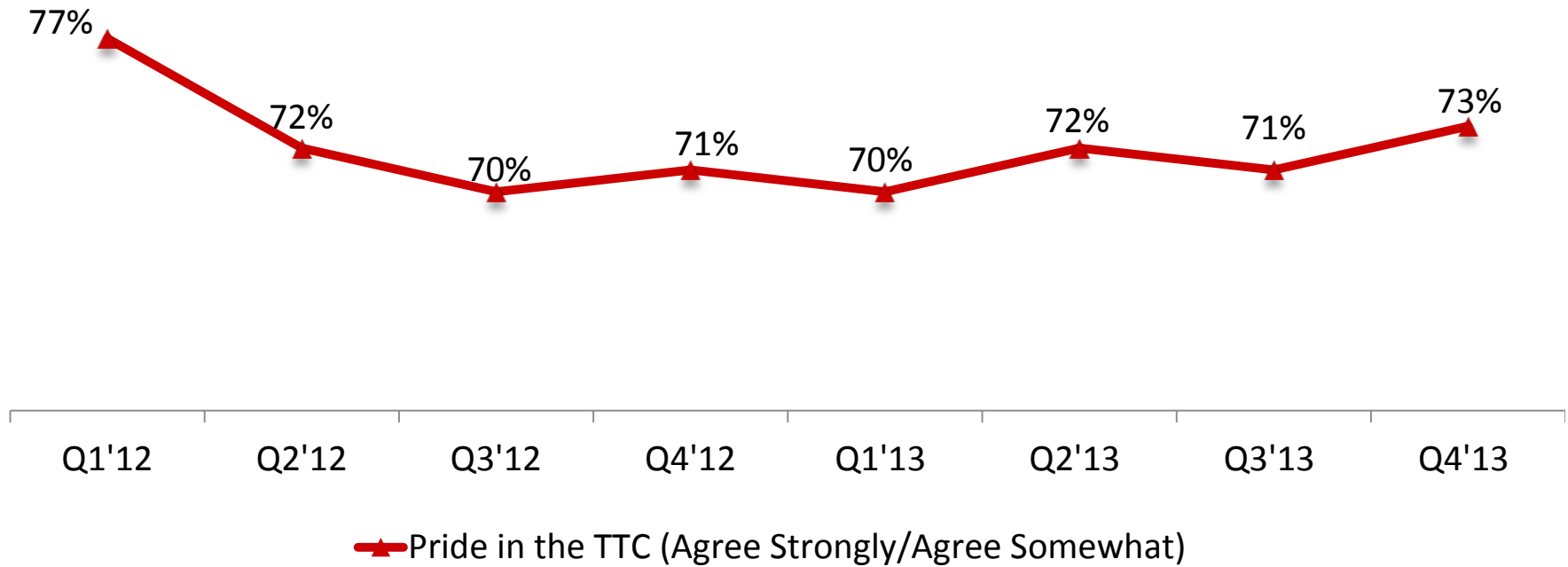


PRIDE IN THE TTC OVER TIME



Pride in the TTC : 2012-2013

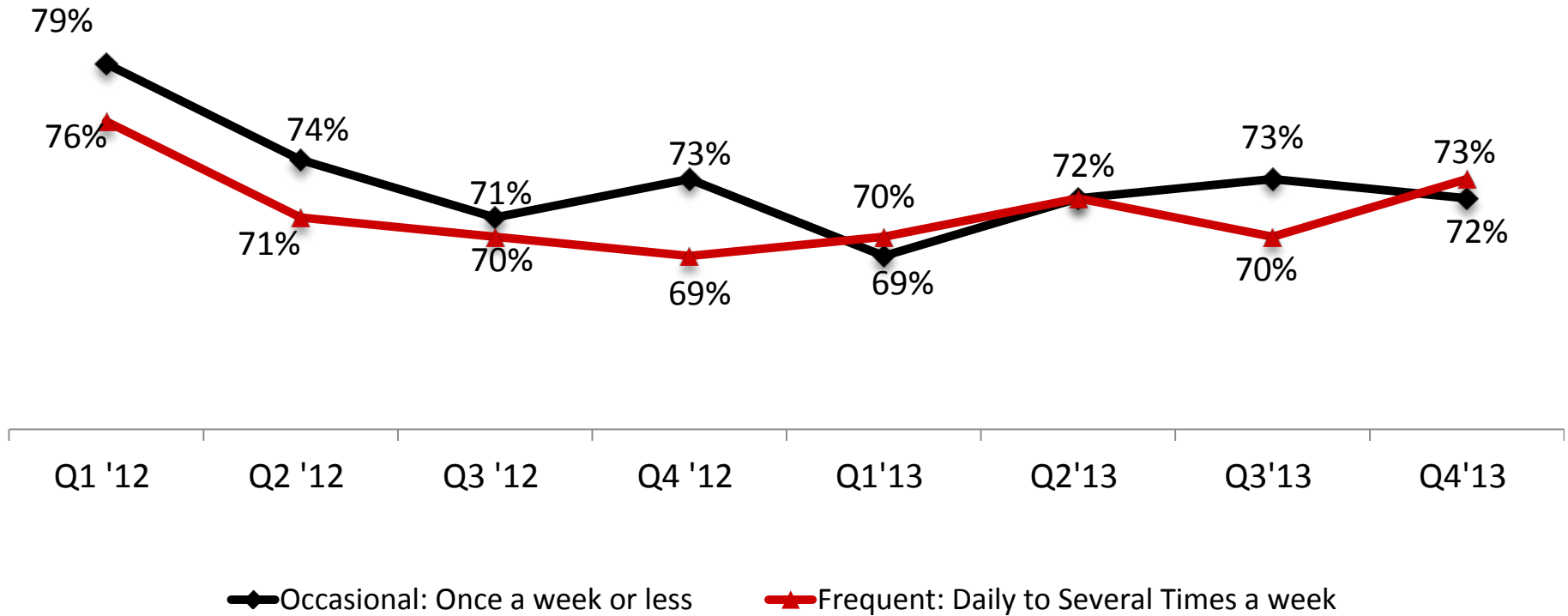
Q1'12-Q4'13
Average Score: 72%



NO SIGNIFICANT DIFFERENCES IN PRIDE BASED ON FREQUENCY OF USAGE



Pride in the TTC Based on Frequency of TTC Usage: 2012-2013*



* Agree Strongly/Agree Somewhat

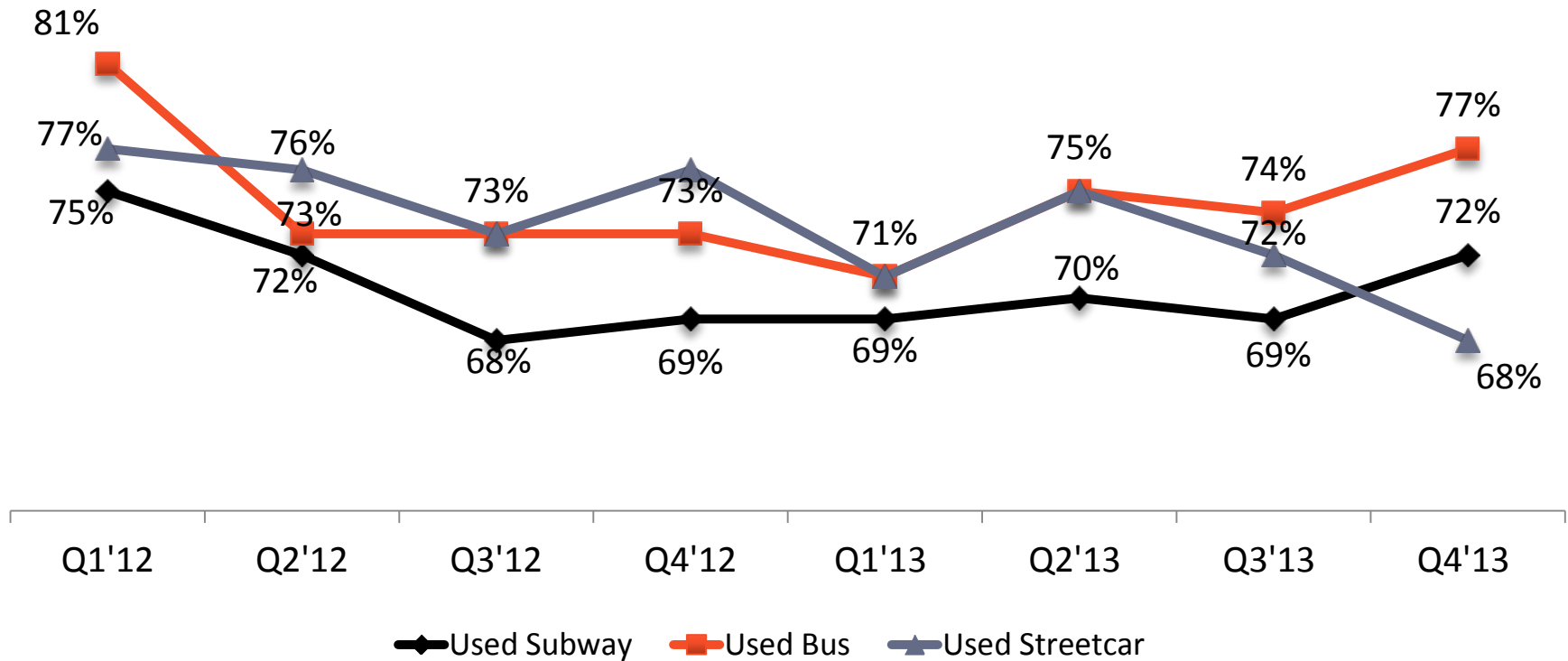
Q18. Can you tell me if you agree, disagree or have no opinion about these statements?
STATEMENT: I am proud of the TTC and what it means to Toronto.



PRIDE BY MODES



Pride in the TTC Based on Modes: 2012-2013*



* Agree Strongly/Agree Somewhat

Q18. Can you tell me if you agree, disagree or have no opinion about these statements?
STATEMENT: I am proud of the TTC and what it means to Toronto.





- Over a quarter of respondents (28%) are strong TTC and transit supporters:
 - Rate TTC a 9 or 10 on Overall Satisfaction and Pride in TTC/its meaning to Toronto,
 - More likely to perceive 'excellent' Value for Money.
- TTC advocates continue to be older, however, are equally likely to be male or female.
- Opportunity to build upon this solid foundation:
 - Monitor changes to size and composition of group over time.





- Reducing the number of service delays and ensuring customers get to their destination on time is key to improving customer satisfaction.
- Improving the streetcar service should remain a priority as it continues to lag behind the subway and bus satisfaction levels and to pull down the overall results.
- Gap in satisfaction between frequent and occasional riders emphasizes the need to ensure the TTC provides consistently good service.





- Continue Customer Satisfaction Survey in 2014
- Update key measures in CEO report on quarterly basis
- Report back to Board twice a year
- Determine options for understanding perceptions of non-TTC customers





QUESTIONS?

