Q1-Q2 Customer Satisfaction Survey Results

September 5, 2017

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Objectives of CSS

Background

• One of the critical measures of perceptions about the TTC
• Measures the overall level of customer satisfaction with key aspects of service provided by the TTC

Objectives

• Tracking customer satisfaction over time
• Identifying and understanding key drivers of customer satisfaction and customer loyalty
• Identifying and prioritizing critical areas for improvement
• Use insights to develop action plans and improve customer satisfaction
## Methodology

<table>
<thead>
<tr>
<th>Method</th>
<th>10-minute telephone survey</th>
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<tbody>
<tr>
<td><strong>Respondents</strong></td>
<td>City of Toronto residents</td>
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<td>13 - 70 years of age</td>
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<td>Frequent users (once every few weeks or more)</td>
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<td>Standard industry exclusions</td>
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<td><strong>Timing</strong></td>
<td>April 2017 - June 2017</td>
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<td><strong>Sample Size</strong></td>
<td>n=1,001</td>
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</table>
Top line results
Overall customer satisfaction

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?

= higher or lower than previous wave or year at C.I. = .95
Customer satisfaction by frequency of use

Occasional: Once a week or less
Frequent: Daily to several times a week

- □ = higher or lower than other subgroups
- ↑↓ = higher or lower than previous wave or year at C.I. = .95
Customer satisfaction by mode

Q1'12  Q2'12  Q3'12  Q4'12  Q1'13  Q2'13  Q3'13  Q4'13  Q1'14  Q2'14  Q3'14  Q4'14  Q1'15  Q2'15  Q3'15  Q4'15  Q1'16  Q2'16  Q3'16  Q4'16  Q1'17  Q2'17

76%  75%  78%  73%  71%  63%  80%  78%  76%  70%  69%  68%  81%  81%  80%  81%  79%  77%  63%  76%  77%  78%  70%  71%  78%  80%  81%

= higher or lower than previous wave or year at C.I. = .95
Perceptions of value for money

On your last TTC trip would you say you received [excellent/good/average/below average/poor] value for your money?

Q1'12 | Q2'12 | Q3'12 | Q4'12 | Q1'13 | Q2'13 | Q3'13 | Q4'13 | Q1'14 | Q2'14 | Q3'14 | Q4'14 | Q1'15 | Q2'15 | Q3'15 | Q4'15 | Q1'16 | Q2'16 | Q3'16 | Q4'16 | Q1'17 | Q2'17

92% | 91% | 90% | 92% | 91% | 91% | 89% | 90% | 95% | 92% | 91% | 90% | 93% | 92% | 91% | 60 | 57 | 58 | 58 | 59 | 60 | 59 | 60 | 58 | 60 | 60 | 61 | 64 | 61 | 64 | 64 | 63 | 63
Pride in the TTC

Can you tell me if you agree, disagree or have no opinion about this statement? “I am proud of the TTC & what it means to Toronto”

Q1'12 Q2'12 Q3'12 Q4'12 Q1'13 Q2'13 Q3'13 Q4'13 Q1'14 Q2'14 Q3'14 Q4'14 Q1'15 Q2'15 Q3'15 Q4'15 Q1'16 Q2'16 Q3'16 Q4'16 Q1'17 Q2'17

72% 72% 72% 69% 73% 71% 71% 73%

↑ ↓ = higher or lower than previous wave or year at C.I. = .95
Pride in the TTC by mode

- **Used subway**
- **Used bus**
- **Used streetcar**

Legend:
- = higher or lower than previous wave or year at C.I. = .95
- = higher or lower than other subgroups
Key Drivers
What Drives Customer Satisfaction?

Key Drivers 2016

Most Influential Factor

Subway
- Trip Duration
- Comfort of Ride
- Wait time
- Vehicle Crowding
- Cleanliness of Station
- Trip Smoothness

Bus
- Wait time
- Comfort of Ride
- Trip Duration
- Vehicle Crowding
- Operator Helpfulness
- Frequency of Delay Announcements
- Personal Safety

Streetcar
- Wait time
- Comfort of Ride
- Trip Duration
- Frequency of Delay Announcements
- Vehicle Crowding
- Ease of Using Fare

Wheel-Trans
- Driver Punctuality
- Driver Courtesy
- Trip Duration
- Driver Helpfulness
- Personal Safety
- Comfort of Ride
- Driver Appearance
- Smoothness of Trip

Indicates a metric with ≥80% satisfaction in Q2’17

Less Influential Factor
Trip duration

% of Respondents Rating 7-10

- Used subway
- Used bus
- Used streetcar

Q1'13 Q2'13 Q3'13 Q4'13 Q1'14 Q2'14 Q3'14 Q4'14 Q1'15 Q2'15 Q3'15 Q4'15 Q1'16 Q2'16 Q3'16 Q4'16 Q1'17 Q2'17

81% 80% 76% 74% 68% 79% 77% 83% 81% 83% 79% 81% 80%
Comfort of Your Ride

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<tr>
<th>% of Respondents Rating 7-10</th>
<th>Q4'15</th>
<th>Q1'16</th>
<th>Q2'16</th>
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<th>Q4'16</th>
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Continuing our focus on understanding key drivers of customer satisfaction and leveraging insights to deliver a service that meets and exceeds expectations