



STAFF REPORT ACTION REQUIRED

2015 Customer Satisfaction Survey Results (including Wheel-Trans)

Date:	February 25, 2016
To:	TTC Board
From:	Chief Executive Officer

Summary

2015 proved to be an exceptional year for the TTC. Customer satisfaction reached an all-time high in Q3 of 81% and the year over year average was significantly higher than 2014 (77% versus 72%), despite the significant decline in Q4 (72%, down 9 points from Q3). The decline in satisfaction is directly linked to the decline of three key drivers of customer satisfaction; customer perceptions of wait times, trip duration and crowding.

There were two notable factors that likely played a major role in affecting customer perceptions of our service; over the last three years there has been a noticeable decline in satisfaction in the fourth quarter of each year, suggesting seasonality has an effect. The other major factor specific to 2015, was the discontinuation of additional service and increased presence of customer service support staff during the Pan Am Games.

Pride in the TTC and what it means to Toronto did not decline as significantly and the Q4 2015 score was higher than the result observed a year ago (71% versus 66%, respectively). Perceptions of value for money remain high, with 95% of TTC customers providing 'average', 'good', and 'excellent' ratings.

Customer satisfaction with Wheel-Trans services continued to be very high in 2015 (85%, the same score as last year) and is consistent across all vehicle types (accessible minivan, Wheel-Trans bus, and sedan taxi). Such a positive Wheel-Trans customer satisfaction score has had a similar impact on perceptions of Pride - the majority of Wheel-Trans customers (92%) are proud of the TTC and what it means to Toronto.

Recommendations

It is recommended that the Board:

1. Receive the 2015 Customer Satisfaction Survey Results (including Wheel-Trans).

Financial Summary

There are **no** financial implications resulting from the adoption of this report.

Accessibility/Equity Matters

The recommendations have **no** accessibility or equity impacts at this time.

Contact

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Attachments

2015 Customer Satisfaction Survey Results (including Wheel-Trans)

2015 CUSTOMER SATISFACTION SURVEY RESULTS (INCL. WHEEL-TRANS)

February 25th 2016

Arthur Borkwood – Head of Customer Development





- Top Line Results
- Summary
- Appendix





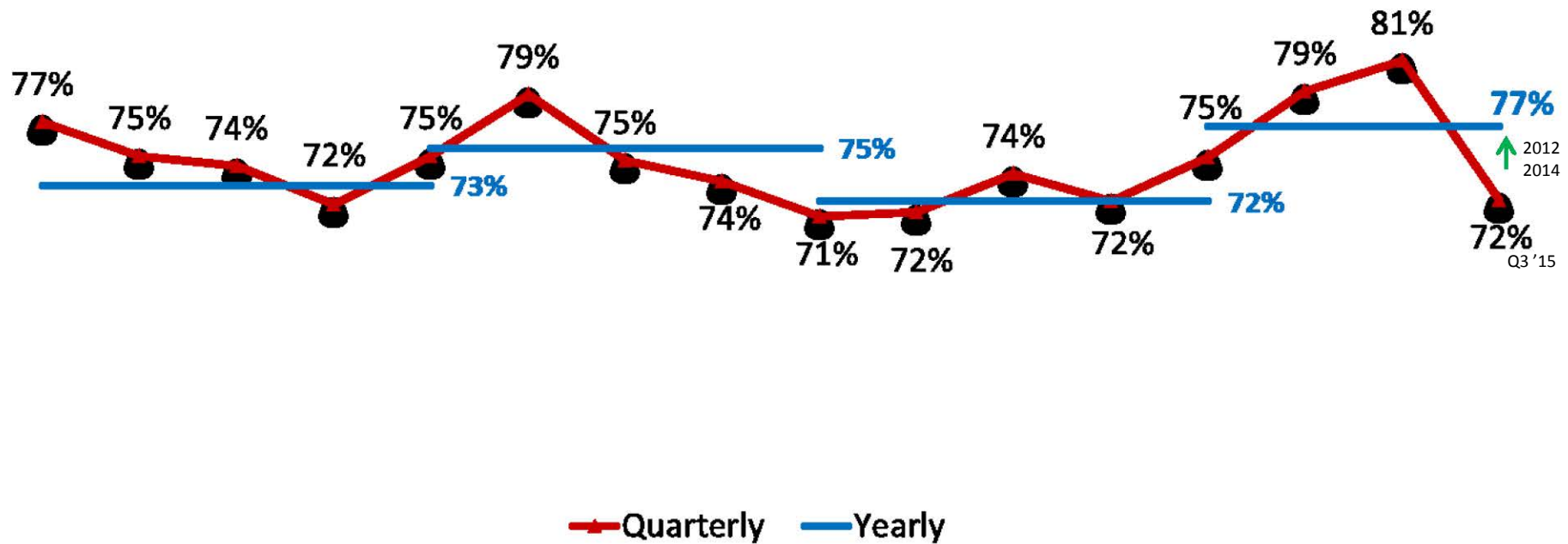
TOP LINE RESULTS



OVERALL SATISFACTION—YEAR OVER YEAR COMPARISON

The overall 2015 satisfaction score is higher than in previous years, despite the decline in Q4'15

Good/Excellent Satisfaction Ratings Over Time

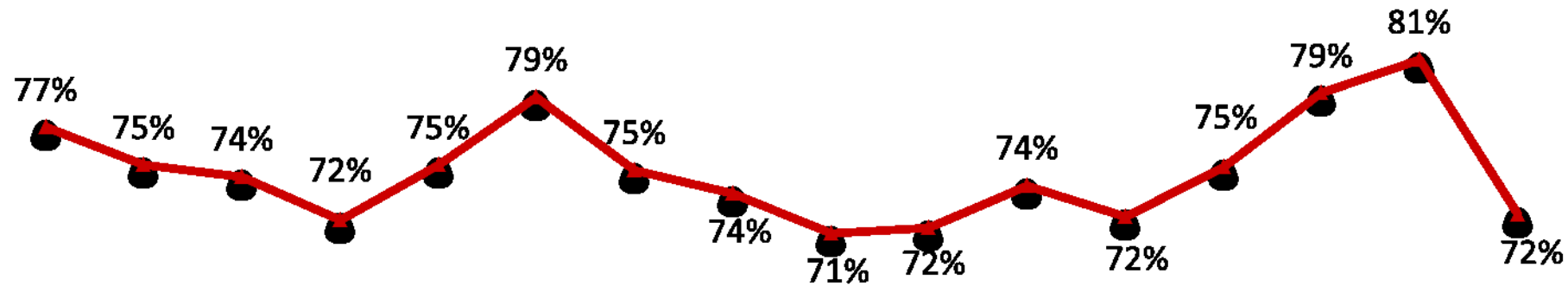


↑ ↓ = significantly higher or lower than previous wave or year at C.I. = .95



OVERALL SATISFACTION AND KEY DRIVERS

Good/Excellent Satisfaction Ratings Over Time



- ↓ Wait time 
- ↓ Trip duration  
- ↓ Crowding  

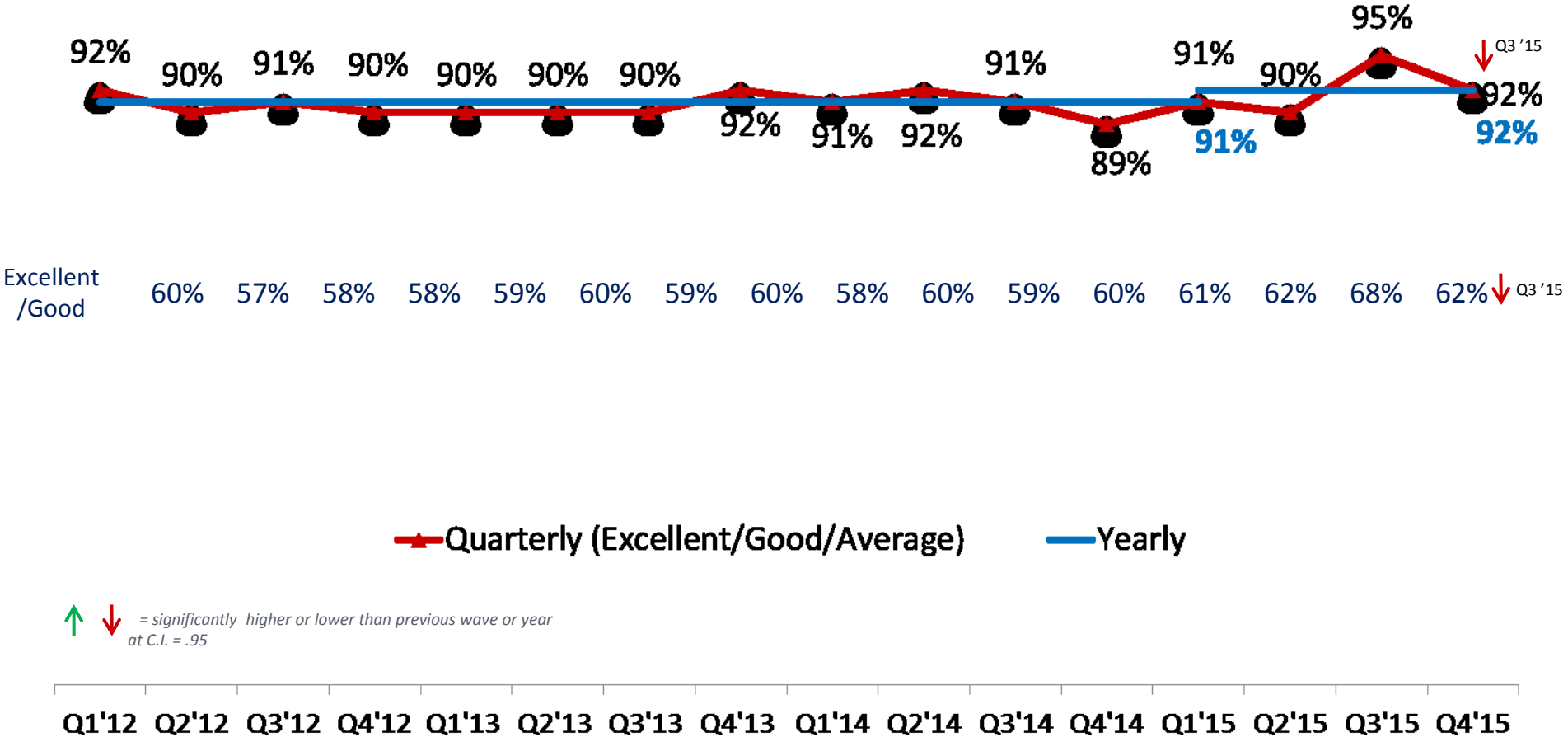
Q1'12 Q2'12 Q3'12 Q4'12 Q1'13 Q2'13 Q3'13 Q4'13 Q1'14 Q2'14 Q3'14 Q4'14 Q1'15 Q2'15 Q3'15 Q4'15



PERCEIVED VALUE FOR MONEY OVER TIME

The overall perception of Value for Money has remained consistently high

Value for Money Over Time

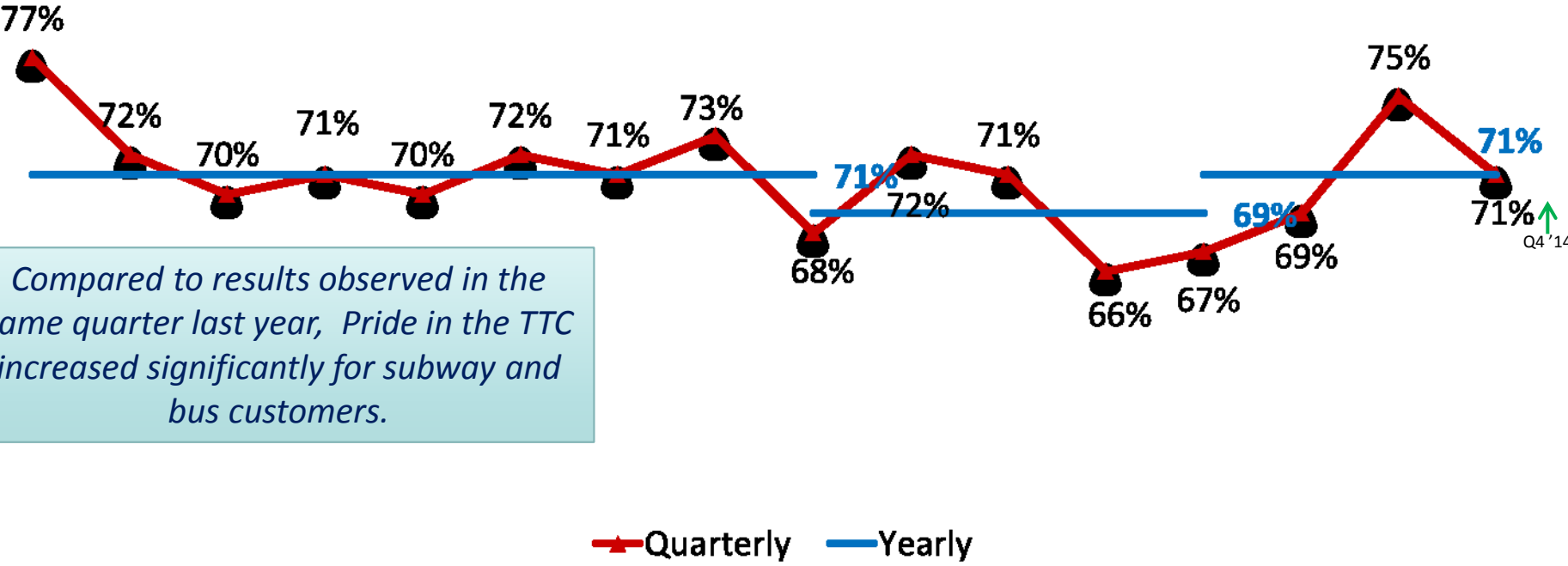


PRIDE IN THE TTC OVER TIME



Decrease in overall satisfaction has not impacted Pride in the TTC

Pride in the TTC Over Time
(Pride in the TTC and what it means to Toronto)



Compared to results observed in the same quarter last year, Pride in the TTC increased significantly for subway and bus customers.

↑ ↓ = significantly higher or lower than previous wave or year at C.I. = .95

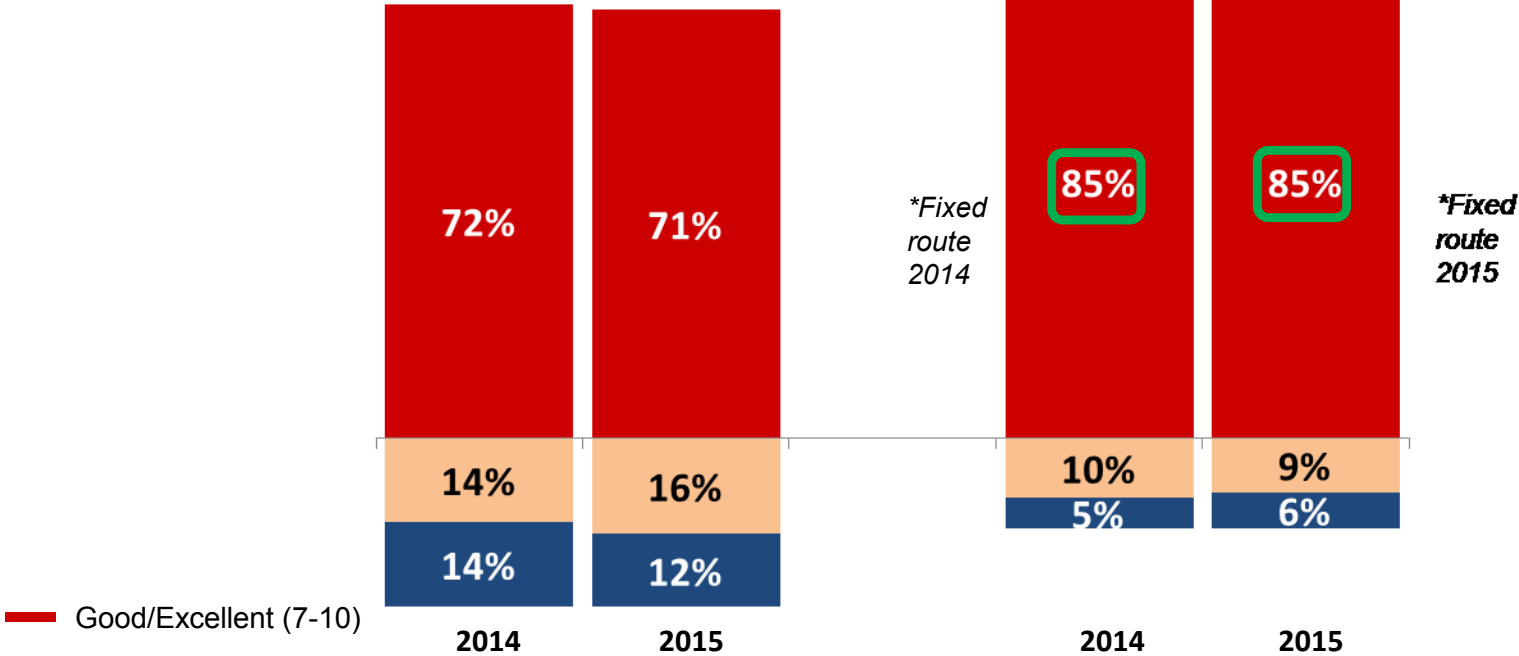


SATISFACTION WITH WHEEL-TRANS SERVICES

Vast majority of customers continue to be satisfied with Wheel-Trans services

Fixed route by WT riders

Wheel-Trans by WT riders



Good/Excellent (7-10)

Middling/No Opinion (5,6,DK)

Poor (1-4)

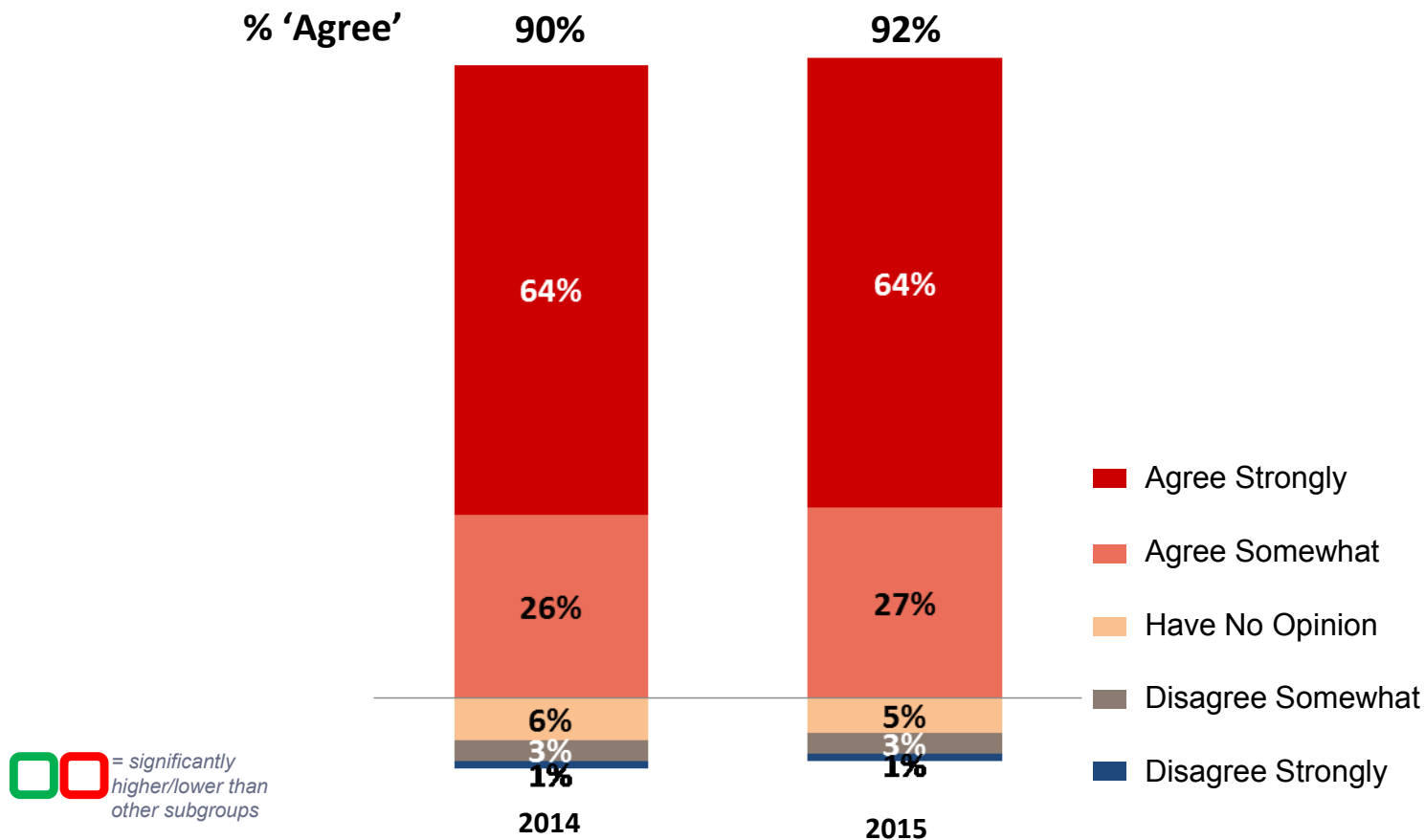
85% 85% = significantly higher/lower than other subgroups



PRIDE IN THE TTC AND WHAT IT MEANS TO TORONTO



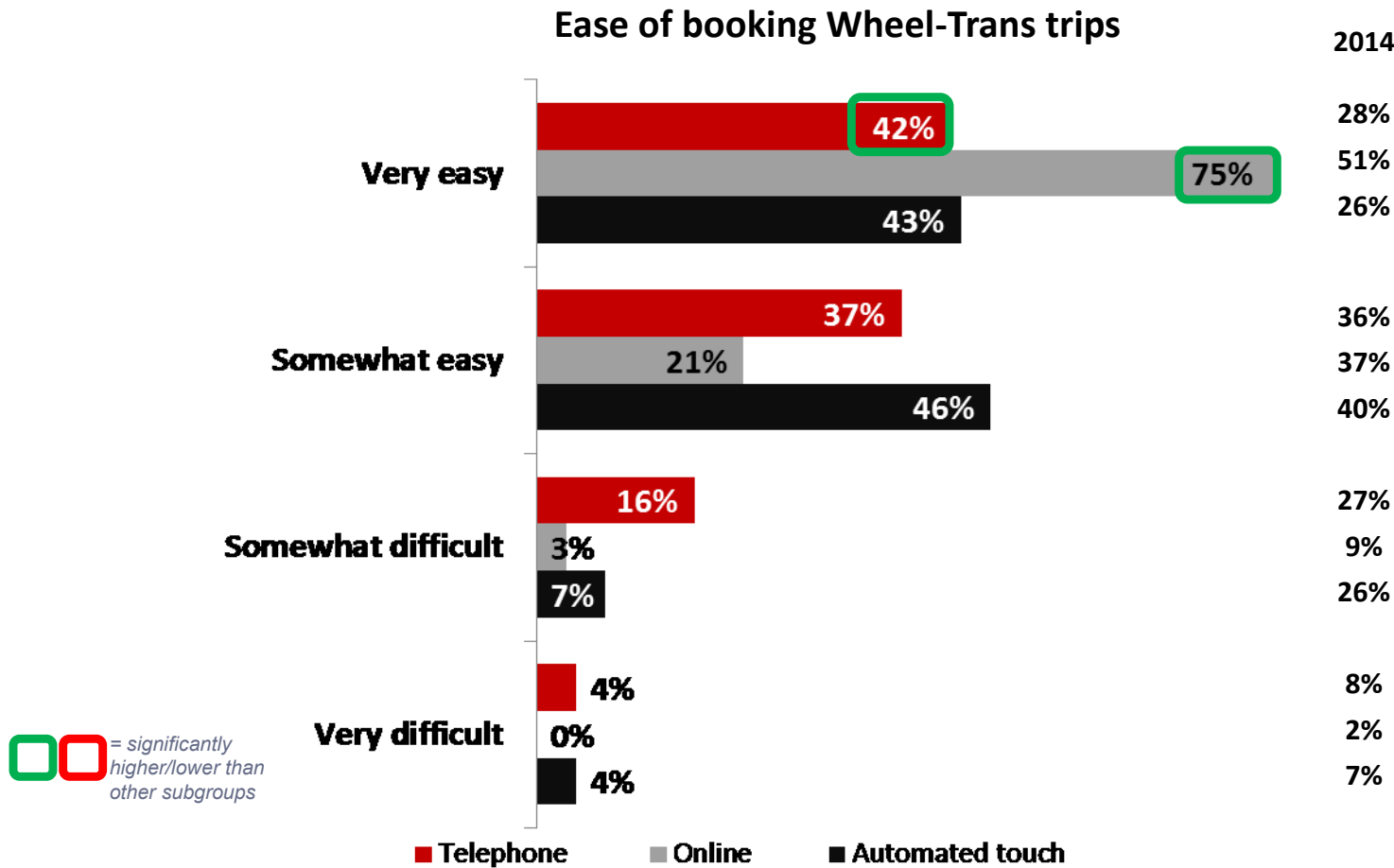
Pride in the TTC is exceptionally high among Wheel-Trans customers and consistent across all vehicle types



EASE OF BOOKING WHEEL-TRANS TRIPS



The ease of booking Wheel-Trans trips over the phone and online has improved compared to last year

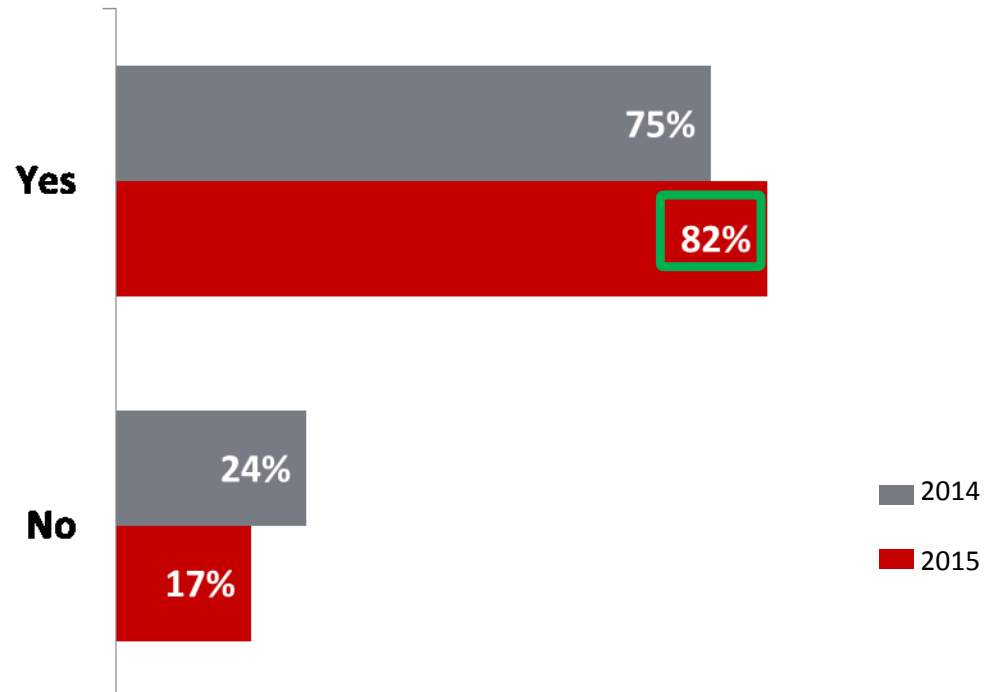




PERCEPTIONS OF SCHEDULING



Perceptions of scheduling improved over last year

Did you receive the pick-up/drop-off time you requested?



  = significantly higher/lower than other subgroups





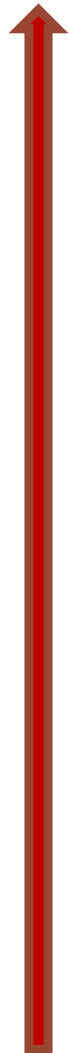
SUMMARY



WHAT DRIVES CUSTOMER SATISFACTION?

Key Drivers

Most Influential Factor



= sig. increase over past three years (Q3'12-Q4'15)

Less Influential Factor

Subway

- Trip duration
- Wait time
- Trip smoothness
- Vehicle crowding
- Staff helpfulness
- Personal safety

Bus

- Wait time
- Trip duration
- Operator helpfulness
- Vehicle crowding
- Operator appearance
- Personal safety
- Trip smoothness

Streetcar

- Wait time
- Trip duration
- Vehicle crowding
- Operator helpfulness
- Trip smoothness
- Helpfulness of announcements

Wheel-Trans

- Driver punctuality
- Driver courtesy
- Trip duration
- Driver helpfulness
- Comfort of your ride
- Driver appearance
- Trip smoothness
- Vehicle cleanliness





- Improving service reliability continues to be our primary focus as it is likely to increase levels of customer satisfaction in key areas, such as ***wait time, trip duration and crowding inside vehicles***
- Consistency is key to customer perceptions of the service we provide and of the TTC as an organization
- Changes to Wheel-Trans eligibility may have a significant impact on customer perceptions



APPENDIX





Background

- TTC Customer Satisfaction Survey (CSS) has been conducted since 2012,
- The CSS is one of the critical measures of perceptions about the TTC (other studies include: Wheel-Trans Customer Satisfaction Survey, Mystery Shopper Survey, Employee Engagement Survey and Stakeholder Satisfaction Survey),
- The survey 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 (pride in the TTC and what it means to Toronto),
- Identifying and prioritizing critical areas for improvement.





Method 10 minute telephone survey

Respondents

- City of Toronto residents
 - At least 13 years old
 - Use TTC at least once every few weeks or more frequently
-

Timing

- Quarterly
 - Data is collected continuously on a quarterly basis, over a period of 3 months to ensure sample is equally distributed by month.
-

Sample Size 1,000 completed surveys



WHEEL-TRANS - OBJECTIVES



Background

As one of the Customer Charter commitments and in an effort to improve the accessibility of transit services, the TTC conducts an annual survey among the Wheel-Trans customers to better understand their needs, concerns, and obstacles that prevent them from using the conventional service.

Objectives

- Measure overall satisfaction with Wheel-Trans Services,
- Get a better understanding of the challenges faced by Wheel-Trans customers and use this information to identify areas for improvement,
- Identify major obstacles that prevent customers with physical disabilities from using conventional services.

Insights will be used to develop action plans and improve customer satisfaction with the TTC's Wheel-Trans services.



WHEEL-TRANS - METHODOLOGY

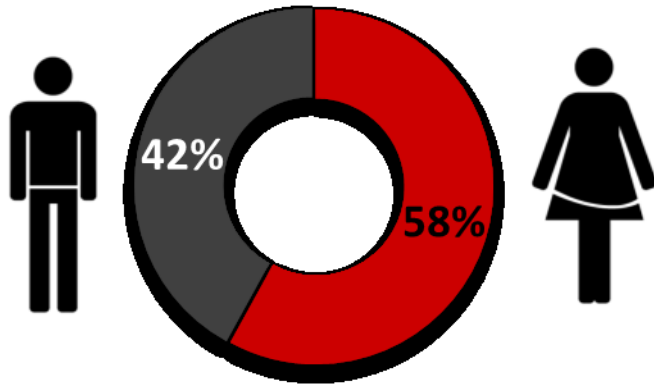


Method	Online survey
Respondents	Wheel-Trans users as per TTC's contact list, and a TTC Wheel-Trans user at least once in the past 12 months or more frequently.
Timing	October 15 th to November 3 rd , 2015
Sample Size	Total sample size $n = 1,554$

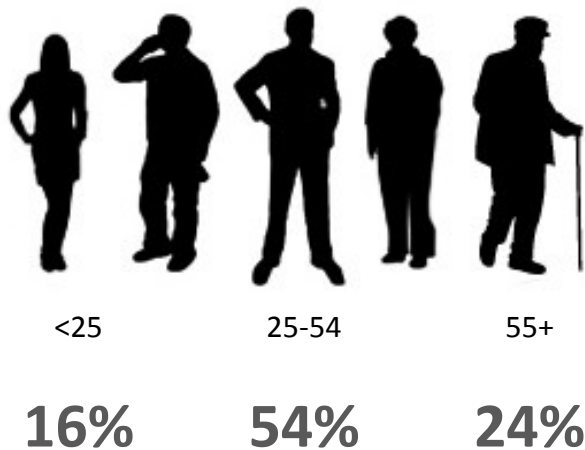


CSS - RESPONDENT *DEMOGRAPHIC* PROFILE


Gender



AGE DISTRIBUTION



HOUSEHOLD INCOME



10% earn <\$30,000
8% earn \$30k – under \$45k
11% earn \$45k to under \$65k
10% earn \$65k – under \$85k
29% earn \$85k +
31% DK/Prefer not to answer



OCCUPATION STATUS

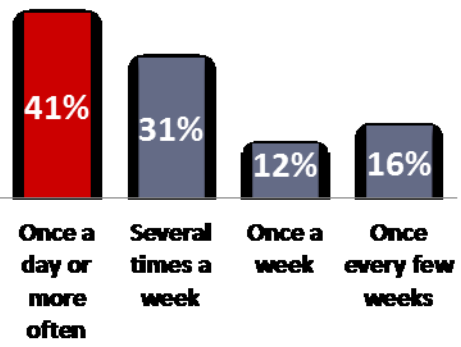
62% work full-time or part-time
8% are unemployed or at home
13% are students
16% are retired



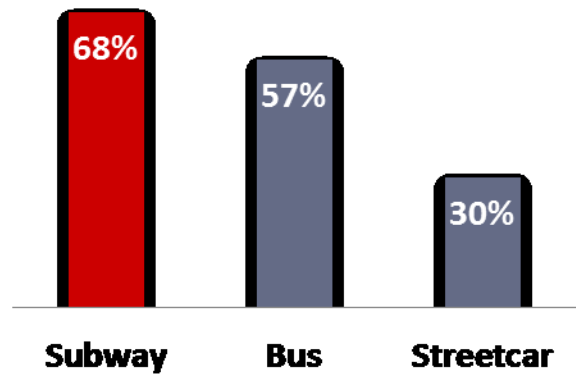
CSS - RESPONDENT BEHAVIOURAL PROFILE



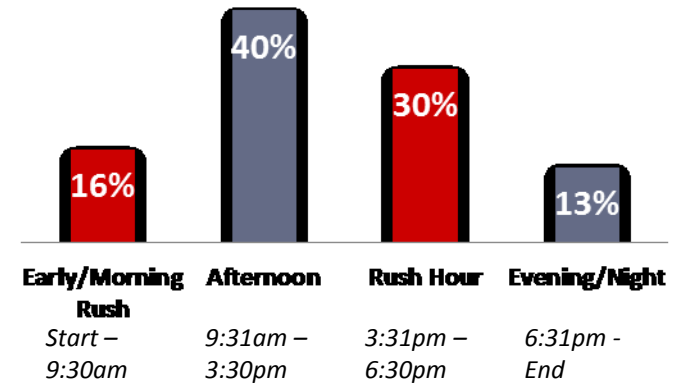
FREQUENCY OF TTC USAGE



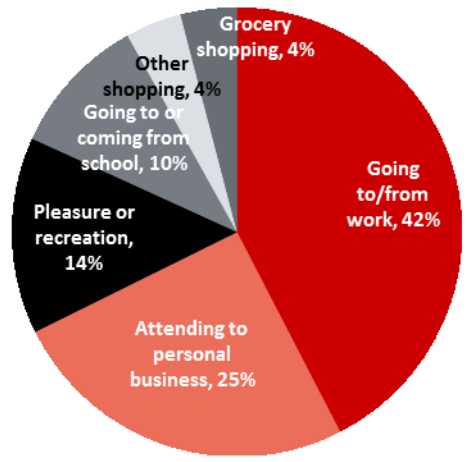
MODE OF TRANSPORTATION OF MOST RECENT TRIP ON TTC



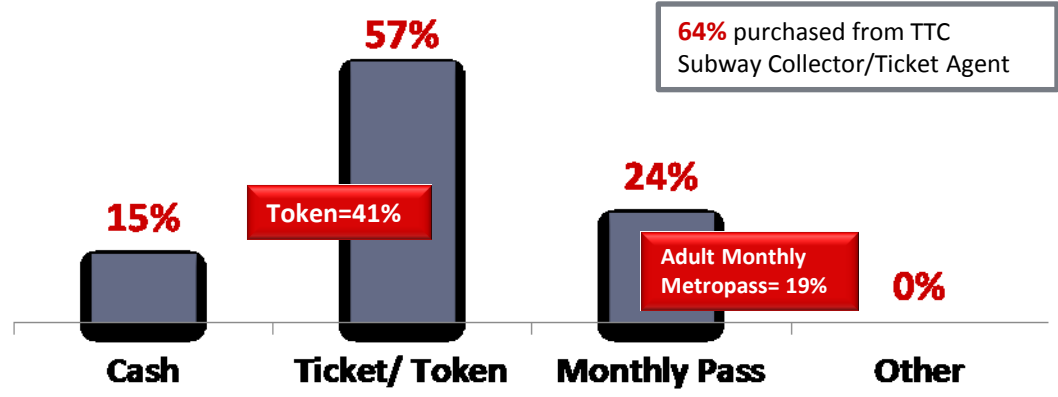
TIME OF DAY OF LAST TRIP



PURPOSE OF LAST TTC TRIP

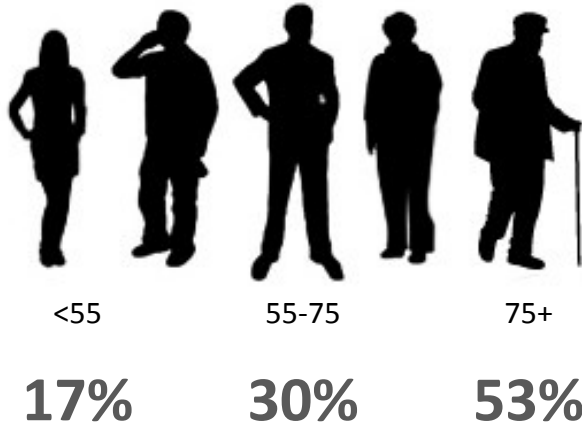


FARE PAYMENT METHOD



WHEEL-TRANS CSS RESPONDENT - DEMOGRAPHIC PROFILE

Age distribution



Household income

65% earn <\$50,000
15% earn \$50k – under \$99k
4% earn \$100k+
16% Prefer not to answer



Employment status

Survey completed by:

74% Wheel-Trans users

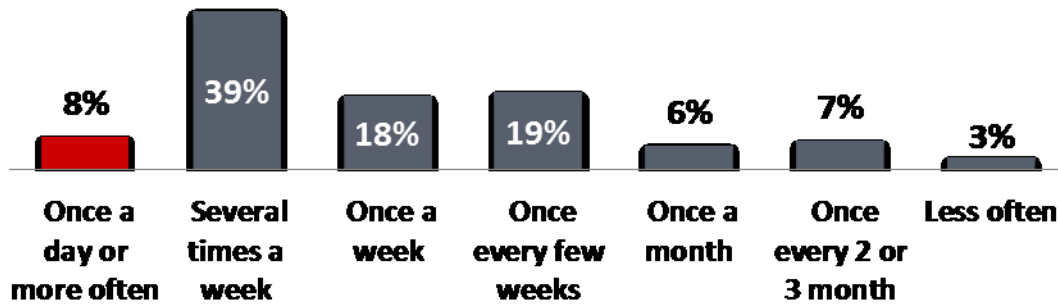
26% Caregivers



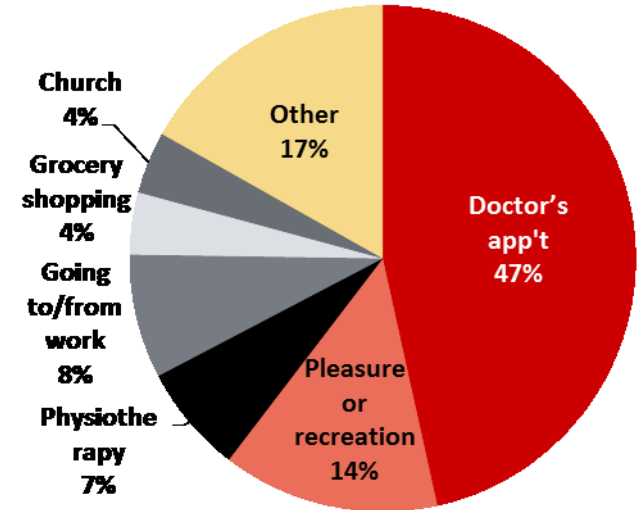
WHEEL-TRANS CSS RESPONDENT - BEHAVIOURAL PROFILE



Frequency of TTC Wheel-Trans usage



Purpose of last Wheel-Trans trip



Mode of transportation of most recent trip on TTC

Usually books Wheel-Trans trips

