



Conventional Transit Customer Satisfaction Survey 2008

Presentation to York Region Transit Committee
by
Environics Research Group



May 14, 2009

- **Overview**
- **Profile of Riders**
- **Transit Use**
- **Satisfaction with YRT/Viva**
- **Areas for Improvement**
- **Conclusions**

Overview

- **Environics was commissioned by York Region Transit to conduct a usage and satisfaction survey with YRT and Viva riders.**
- **The fieldwork was conducted by Advitek.**
- **The survey updated the results from surveys conducted in 2002, 2003, 2004 and 2006.**
- **The objectives of this research are the following:**
 - Provide a demographic profile of YRT and Viva riders;
 - Provide a snapshot of usage patterns;
 - Assess rider satisfaction with vehicles, drivers, specific routes traveled, contractors and support services;
 - Assess changes in rider satisfaction in the past three to four years;
 - Provide insight into whether service contractors are attaining their contracted service obligations;
 - Determine the drivers of satisfaction;
 - Determine areas and opportunities for service optimization.

Research Methods

- The survey was conducted through an on-board/at stop survey instrument.
- It was administered using rider self-complete paper and pencil questionnaires.
- The survey was conducted among 7,040 riders.
- It was conducted between November 25 and December 17, 2008.

- The sample was structured to ensure statistically valid representation across as many routes as possible.
- The chart below shows the number of completed surveys by Division, which are very close to the actual ridership proportions.

Contractor	Average Weekday Boardings (Sept 07-08)	As a % of Overall Ridership	Number of Completed Surveys	As a % of Completed Surveys
Miller-Markham	9,630	9%	670	10%
Miller-Richmond Hill	9,509	9%	642	9%
Laidlaw	5,997	6%	402	6%
CanAr	26,869	26%	1,860	26%
TTC	14,919	14%	1,010	14%
Veolia	34,821	34%	2,456	35%
YRT/Viva Total	101,745	98%*	7,040	100%

*Note that a few routes were not surveyed (mostly GO shuttles and community buses). These routes account for 1,826 average weekday boardings or 2% of overall ridership.

Profile of Riders

Profile of YRT and Viva Riders

- The profile of YRT and Viva riders is quite similar.

YRT

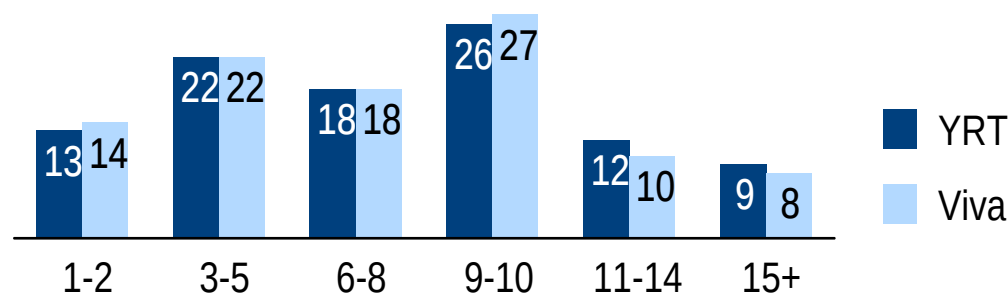
- YRT riders are more likely to be women (56%).
- Skew towards younger riders under 25 years of age (56%),
- But 18-24 age group is the largest concentration of riders (35%).
- Most employed (52%), but large proportion of students – high school, college and university (40%).
- Similar proportions report household incomes of under \$25,000 (39%) and \$50,000 or more (36%).
- Do not own cars (79%).
- Most born in Canada (54%)
- But large proportion born outside Canada (46%).

Viva

- Viva riders evenly split between women (52%) and men (48%).
- Skew towards younger riders under 25 years of age (56%),
- But 18-24 age group is the largest concentration of riders (42%).
- Most employed (52%), but large proportion of students – high school, college and university (39%).
- Similar proportions report household incomes of under \$25,000 and \$50,000 or more (35% each).
- Do not own cars (75%).
- Most born in Canada (56%)
- But large proportion born outside Canada (44%).

Usage of YRT/Viva

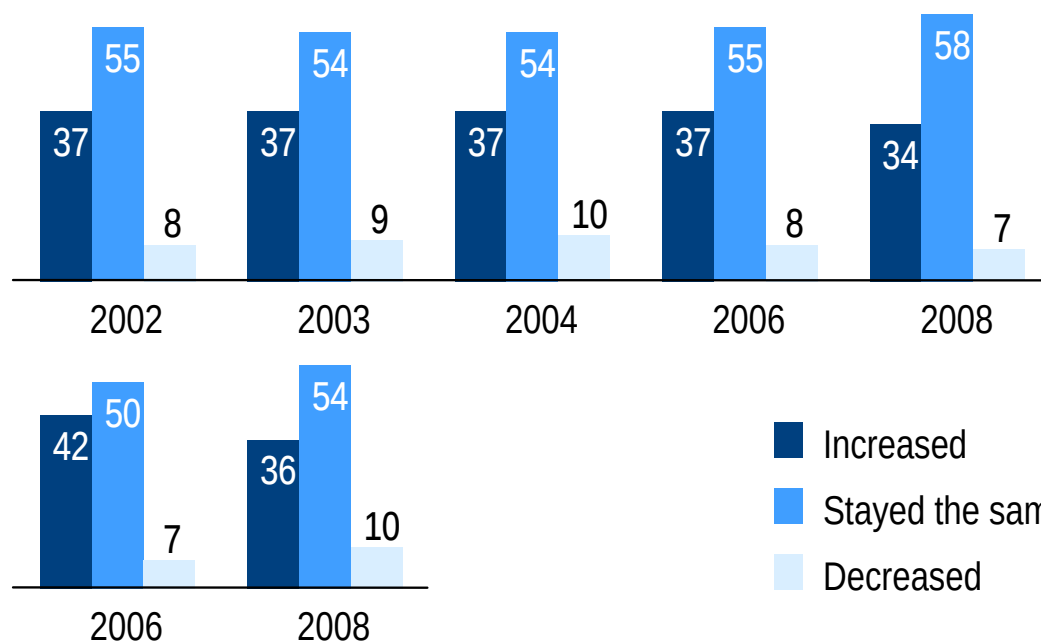
- Most riders on YRT and Viva are commuters, taking nine or more one-way trips per week (47% YRT, 45% Viva). Slight declines since 2006.



- About one-third of YRT (34%) and Viva (36%) riders say they have increased their average number of trips over the past six months.

- Both YRT and Viva riders are far more likely to report that their usage has increased than to say it has decreased.

- However, since 2006, both YRT and Viva riders are less likely to report that their usage has increased.



Q.8 How many one-way trips do you typically make per week (i.e., to work and back would count as 2 trips)?

Q.9 Over the past six months, has your average number of transit trips taken on the YRT/Viva system increased, decreased or stayed the same compared to the previous six months?

Satisfaction with YRT/Viva

Satisfaction with Specific Services

- Satisfaction with cost of fare down dramatically for both YRT and Viva; also considerable declines, particularly for YRT, for hours of service.
- Viva performs better than YRT in nearly all areas, most noticeably on frequency of buses, hours of service and how well bus stops are lit.
- YRT outperforms Viva on walking distance to bus stop.
- YRT and Viva are on par on drivers driving safely and on purchasing from ticket vending machines.

	YRT		Viva	
	2006	2008	2006	2008
Drivers drive safely	88	87	89	87
Vehicles are in good condition	80	86	97	95
Drivers are knowledgeable about the overall system	84	84	89	89
Vehicles are clean	77	79	92	88
Drivers are friendly and helpful	80	78	86	84
The area this route covers	80	75	82	80
Purchasing from ticket vending machines	76	74	75	74
Walking distance to your YRT/Viva bus stop	74	73	66	66
Cleanliness of bus stops, shelters and terminals*	n/a	70	n/a	80
Availability of waste and recycling containers	62	64	69	74
How well bus stop areas are lit	60	60	80	76
When the route operates (hours of service)	64	53	79	72
Frequency of buses arriving at your stop	47	43	76	72
Cost of the fare	52	33	67	39

* In 2006, the services were asked as separate questions, so the tracking data is not directly comparable.

Q.3 Please indicate how satisfied you are with this route you are currently travelling on/about to travel for the following ...
Q.5 Again, thinking about your experience travelling on this route, please rate your satisfaction with ...

Frequency of Experience

- Frequency of encountering specific situations on YRT has remained essentially stable since 2006 in nearly all areas, but there has been a considerable deterioration in the area of buses being more than 5 minutes late (26% say they always or most of the time encounter this situation using this route, up from 17% in 2006).
- Frequency of experiencing nearly all these situations on Viva is also stable since 2006, but is up slightly in the area of buses being more than 5 minutes late (10% say they always or most of the time encounter this situation using this route, up from 5% in 2006).

Always/most of time

	YRT					Viva	
	2002	2003	2004	2006	2008	2006	2008
Buses arriving on schedule	59	58	55	61	58	83	80
Buses being more than 5 minutes late	26	21	20	17	26	5	10
Overcrowding	22	21	21	18	21	23	20
Buses arriving ahead of schedule	17	16	16	13	13	11	11

Q.4 How often do you encounter the following situation(s) using this route ...

Overall Performance Ratings Given to YRT & Viva by Riders

- Seven in ten YRT riders offer positive performance ratings for YRT (rate it as good, very good or excellent).

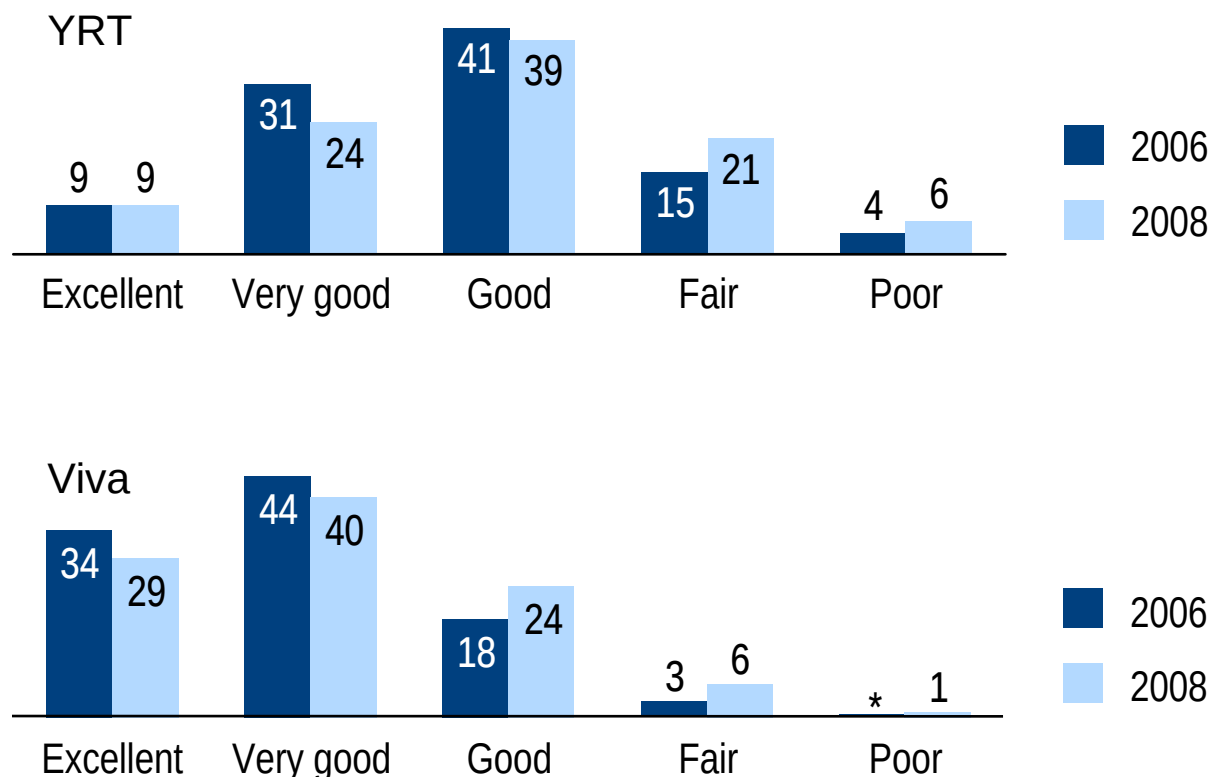
- This figure is down noticeably from 2006 (72% vs. 81%).

- This decline is found mostly in the ratings of very good.

- Nine in ten Viva riders offer positive performance ratings for Viva.

- This figure is similar to that found in 2006.

- However, ratings of excellent and very good are both down, while that for good and fair are up.



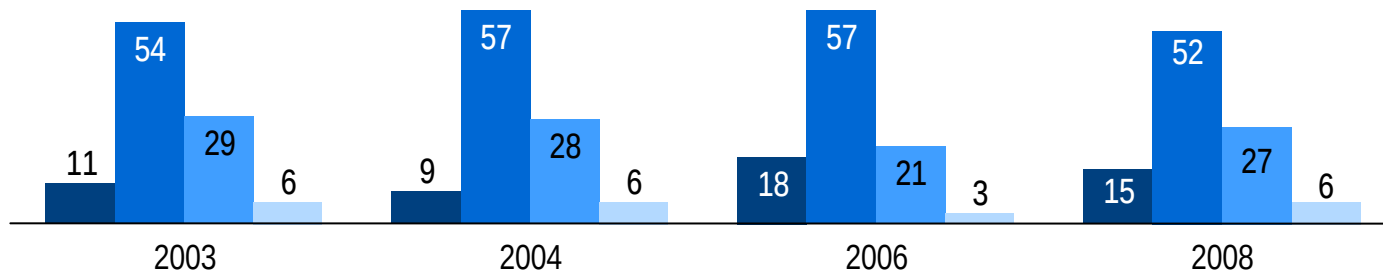
* Less than one percent

Q.1 Thinking about your overall experience with YRT and Viva, how do you rate each transit service for their overall performance.

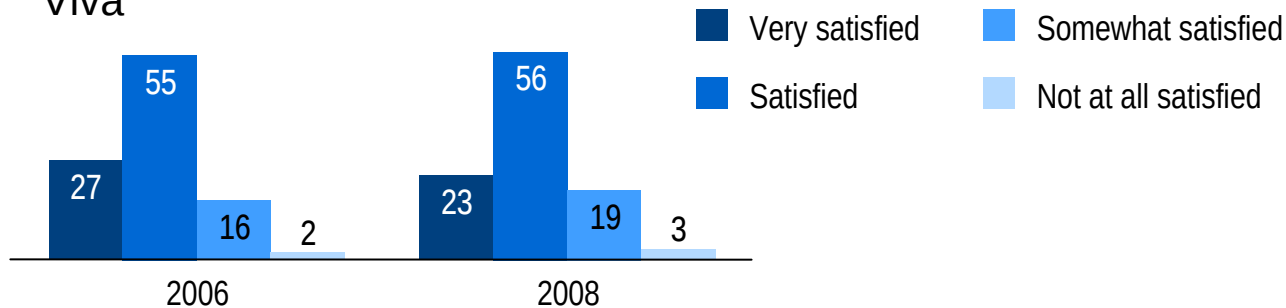
Overall Satisfaction with Public Transit in York Region

- Two-thirds of YRT respondents are satisfied with public transit in York Region, a decline from 2006 (67%, down from 75% in 2006). More than one in ten (15%) say they are very satisfied.
- The higher figure in 2006, may have been that the introduction of Viva in 2005 produced a halo effect, increasing satisfaction throughout the region.
- Eight in ten Viva respondents continue to be particularly satisfied – 56% are satisfied and 23% are very satisfied.

YRT



Viva

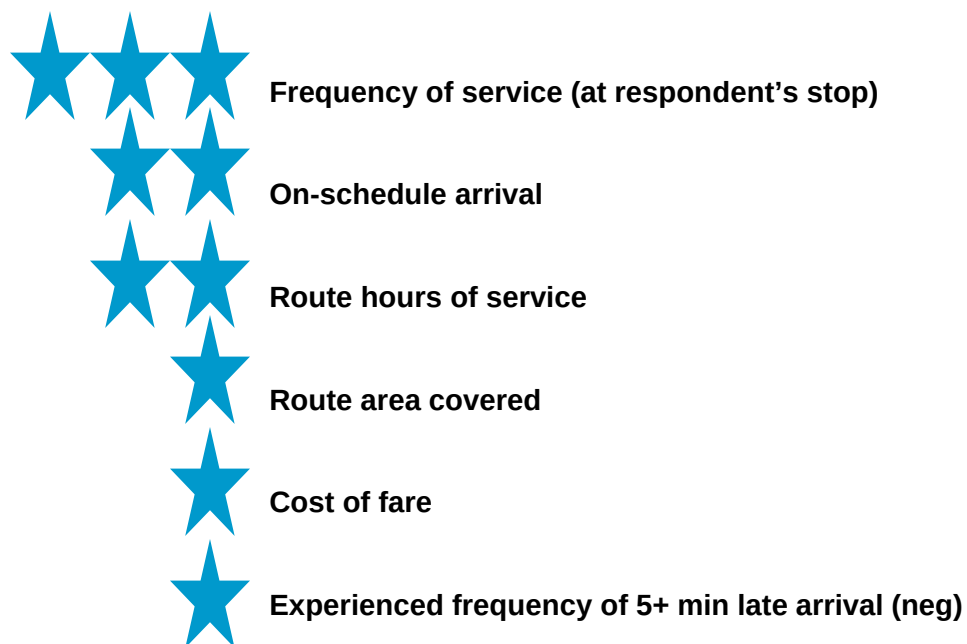


Q.10 On a scale from 1 to 8, how satisfied are you with public transit within York Region?

Areas for Improvement

Drivers of Satisfaction Analysis

- A drivers of satisfaction analysis was conducted on the results of the conventional transit satisfaction research to see what a the key drivers of overall satisfaction.
- Using a star system (3 three being the most important; 1 being the least) we can rank the key drivers as follows:



Opportunities for Service Optimization

- Based on the Drivers Analysis, YRT scores lower (60% or less) on four out of the six drivers of overall satisfaction with YRT/Viva.
 - Frequency of service
 - On schedule arrival
 - Route hours of service
 - Cost of fare
- Moreover, YRT scores lower on the most important drivers of overall satisfaction frequency of service (3-star), on-schedule arrival (2-star) and route hours of service (2-star).
- Hence, any improvements that can be made in these areas, within YRT's budget limitations, could see movement in overall satisfaction with YRT.
- In contrast, Viva receives excellent scores (80% or more) on three out of the six drivers of overall satisfaction:
 - On schedule arrival
 - Route area covered
 - Experience frequency of more than 5 minutes late arrival
- Viva scores lower on one driver of overall satisfaction:
 - Cost of fare

Conclusions

- The profiles of YRT and Viva riders are similar. Hence, similar communications methods can be used to reach both sets of riders.
- The 18-24 year age cohort represents the largest proportion of both YRT and Viva riders.
- Viva continues to outperform YRT in most areas of service, but this is to be expected given the different mandates for the two services.
- Hence, it is not surprising that Viva continues to receive higher overall performance ratings than does YRT.
- The analysis of the results indicate that there are six drivers of overall satisfaction with public transit in York Region.
- YRT is not performing as well on four drivers of satisfaction, including the three most important ones – frequency of service, on-schedule arrival and route hours of service. The other is cost of fare.
- Other than cost of fare, if York Region Transit was to address the other areas, within budget limitations, this may improve overall satisfaction with public transit in York Region and, specifically, with the YRT service.



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Rider Segmentation

May 2009

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- Environics Research Group did a customer satisfaction survey in November 2008
- Environics Analytics' tools allow us to gain further insight into the segments that are YRT riders:
 - Demographics
 - Location
 - Social Values
 - Media Habits
- The added insight helps YRT:
 - Guide marketing strategies
 - Locate segments
 - Develop targeted segment messaging
 - Provide focused and efficient communication plans
 - Understand conversion opportunities from cars to public transit

PRIZM is ...

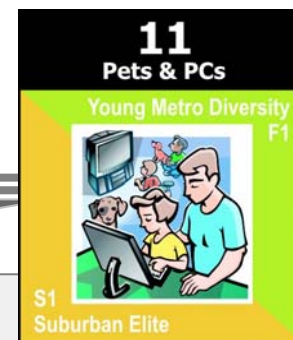
- A system that classifies Canada's 54,000 neighbourhoods into 66 types
- The first (and only) geodemographic system to combine values with demographics
- Linked to 800,000 postal codes
- Linked to all major marketing and media databases in Canada
- With colourful names like Lunch at Tim's and La Vie est Belle

Used to ...

Understand and target:

- lifestyles
- purchase preferences
- media use
- mindsets/motivations

... of target segments



- Profile customer data
 - Profiled YRT and VIVA survey data
- Identify target segments
- Identify priority segments for imaging
 - Based on discussions with YRT
- Identify key NADBank categories to analyze
- Image priority segments
 - Detailed analysis designed to help conjure images of the target households
 - To provide insight and direction for campaigns (spring campaign) and other marketing strategies

- Profiling YRT and VIVA survey responders with PRIZMC2 showed that there were 7 distinct types of people using transit with different travel behaviours
- In review with YRT the four priority rider segments were chosen and renamed to conjure colourful images of who they truly are



On-the-Go Families
Upscale Riders
Asian Travelers
Modest Movers



% of riders

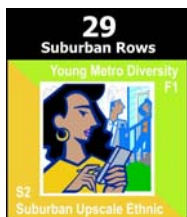
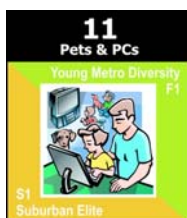
35%

6%

9%

16%

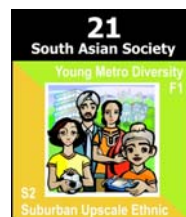
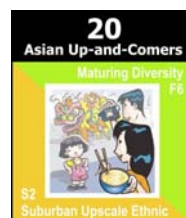
On-the-Go Families



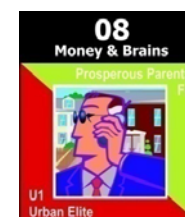
Modest Movers



Asian Travelers



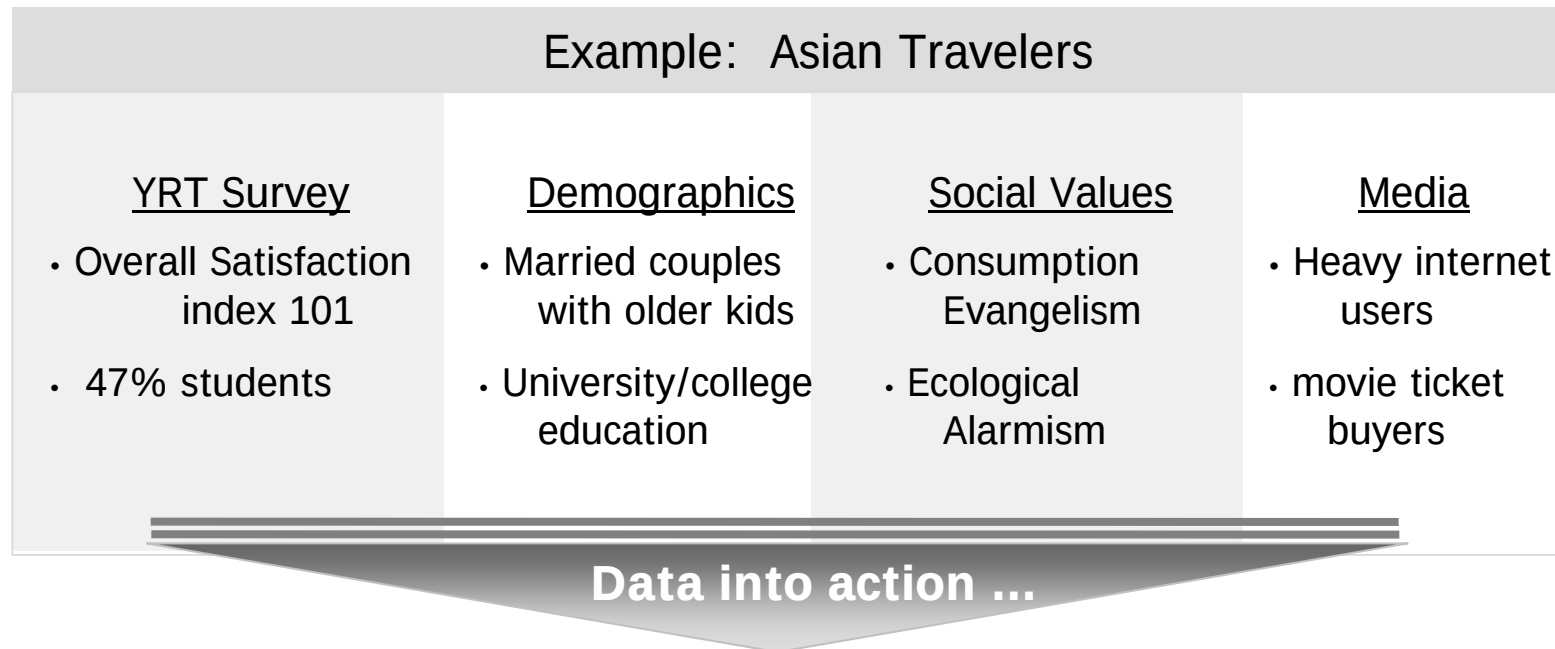
Upscale Riders



66% Riders
50% Pop 12+ in defined area
Index = 130

1. Segments are linked to:
 - a. behaviour, value and demographic data collected from various sources
 - b. YRT survey data
2. Using linked data, a detailed analysis created for each segment to describe what they are like

Example: Asian Travelers			
<u>YRT Survey</u> • Overall Satisfaction index 101 • 47% students	<u>Demographics</u> • Married couples with older kids • University/college education	<u>Social Values</u> • Consumption Evangelism • Ecological Alarmism	<u>Media</u> • Heavy internet users • movie ticket buyers



- ✓ Reach target students online
- ✓ Interact with them at the movies
- ✓ Make good impressions that they'll talk up to friends and family

Sample Imaging
Asian Travelers

Snapshot Demographics

Lifestage: 59% between ages 35-54; married couples with older kids

HH Size: Large; 56% have 4+ members; 13% are multiple family

Housing Type: 91% own; mostly newer, single-detached; high rates for duplex

Education: 34% university; 14% college; 5% trades; 48% high school or less

Job Type: 15% business; 7% sciences; 7% unique to manufacturing

Commuting: 81% drive; 17% public transit

Diversity: 68% immigrant population; 89% visible minority

Mother Tongue: 73% non-official language, 36% Chinese, 8% Tamil

Average HH Income: \$99,042 - York Region average is \$120,013



Social Values Overview

STRONG

Joy of Consumption

- Like to lead in keeping abreast of new products and services that can provide them with enjoyable, exciting experiences
- Will research and compare them in depth

Consumption Evangelism

- What they purchase must be something that they can proudly relate amongst their wide social networks

Ecological Alarmism

- Strong belief environment in grave danger
- High anxiety at prospect of violence

Concern for Appearance

- Purchases must reflect well on their public image

WEAK

New Social Responsibility

- Feelings of attachment to community or openness to others are likewise not decisive influences

Time Stress

- Time-saving, pressures to multi-task, or anxiety due to a sense of being overwhelmed by lack of time, are not priorities for members of the Asian Travelers group

Canadian Identity

- Appeals to being a Canadian are not strong motivators for this group

Media Highlights

Television: Heavy viewers; reality shows, sports, music videos, children's programs, nature, variety specials, sci fi movies, entertainment; spend more time than previous year; 6-7 hours past weekend;

Radio: Light to moderate listeners

Newspapers: Light readers of dailies, heavy for community newspapers; help wanted, careers, merchandise/vehicles for sale, services for home

Magazines: Light readers but are spending more time than last year

Internet: Heavy users; buy movie tickets, computer software, travel arrangements, online banking, read newspaper classifieds; all

Other: Community newspapers



Websites Accessed Past Month ...

- Slightly above average rates for shopping at Markville Mall
- Below average rates for shopping at Power Centres and Vaughan Mills
- 40% visited at least one movie or theatre website in the past month – high rates
- Listening to online radio – high numbers and high rates
- Researching restaurant listings/reviews and travel destinations – large % penetration and high rates

73 % have attended the movies in the past year
43 % attended past month

With the added insight provided by Environics Analytics tools, YRT has been able to:

1. Identify and understand key target segments
2. Identify geographical locations of target households
3. Guide media strategy for connectivity campaign
 - Using media highlight reports
4. Link target segments to valuable syndicated survey data to enhance current available rider data

Next Steps

Creation of Customer Satisfaction Improvement Team

Focus:

- ❑ Frequency of Service
- ❑ Value of current fare structure
- ❑ Customer service training strategy for YRT staff

Next Steps - continued

❑ PLAN09

- 24,600 extra hours of new revenue service

❑ Traveller Information

- Real-time info on web, IVR and email
- More real-time message signs across the system.

Next Steps - continued

Development of Marketing plan that takes into account Environics and Prizm results.