

2015 MiWay Customer Satisfaction Survey Results - Executive Summary

May 2016



Ipsos Loyalty



Background


Objectives

- The purpose of the 2015 MiWay Customer Satisfaction Survey project is to support MiWay's strategic business goal to grow ridership by developing market intelligence. The project has three objectives:
 - Measure customers' overall satisfaction with MiWay as well as their satisfaction with five key service aspects: 1) Transit Operators; 2) Vehicles; 3) Routes, Schedules and Stops; 4) Fares; and 5) Communication and Information Access, including Customer Service.
 - Measure and evaluate MiWay performance and opportunities for improvement relative to previous results (2013 and 2011).
 - Identify service improvement insights to guide transit business area planning.

Summary of Findings

Summary

- Overall Satisfaction with MiWay and satisfaction with various services provided by MiWay are high.
- One-third of MiWay customers would recommend MiWay to others.
- Since 2013, slight changes ($\pm 1\%$ to -3%) in customer satisfaction occurred in three of the five service delivery areas: Transit Operators, Vehicles, and Routes, Schedules and Stops.
- Modest improvements ($+4\%$ to $+6\%$) occurred in the fares area and modest declines (-4% to -2%) were seen in Communication/Information Access and Customer Service).
- 82% of customers who used the Mississauga Transitway since 2014 are satisfied with it. MiWay service to the first four transitway stations (Central Parkway, Cawthra, Tomken and Dixie) began in Nov. 2014.
- While potential for improvement exists in each area, service expectations among customers could also be increasing.

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- A decorative graphic consisting of three vertical bars of increasing height from left to right, located to the left of the list.
- Data collection: paper-and-pencil, self-complete, on-board/at stop survey instrument.
 - Sampling: random selection of customers on buses / at terminal. Survey length: 5 - 8 minutes.
 - Field dates: Nov. 3 – Dec. 1, 2015.
 - This is MiWay's third customer satisfaction survey since the brand launch in October 2010.
 - A key requirement of this project was to ensure statistically valid representation across as many routes as possible within the minimum required sample size of 10,500 completed interviews. The total sample achieved a 95% confidence level with 1% margin of error.
 - Total of 11,172 complete, valid surveys were obtained.

Overall Satisfaction

High Satisfaction



- Overall Satisfaction with MiWay remains at 82%, unchanged since 2013. Overall Satisfaction is consistent across all three service types - MiExpress and MiLocal and school routes.
- Most customers report their level of Overall Satisfaction has not changed over the past six months.

Mission Delivery



- The majority of customers (87%) agree that MiWay is delivering on its mission to provide a customer-focused transit service that offers safe, accessible and efficient transportation options for all citizens. Agreement has increased since 2013.

Delivering Value



- Seven in ten customers are satisfied with the value received for fare paid. The satisfaction with the value for fare paid has increased significantly since 2013.

Understanding the Results

- a) OSAT = Overall Satisfaction;
- b) Risk is the percentage of customers who are currently satisfied with MiWay who may become dissatisfied if performance on a given attribute declines. Opportunity is the percentage of those customers who are not currently satisfied with MiWay who could become satisfied if MiWay's performance on a given attribute increases;
- c) T3B is a summary metric for satisfaction measurement. Satisfaction is measured on a 7-point scale, with '7' meaning 'Very Satisfied' and '1' meaning 'Very Dissatisfied' and T3B is the sum of the top 3 (most positive) points of the scale;
- d) Arrows indicate significant increases or decreases compared to previous wave in 2013. A green up arrow means significantly higher than compared data point; a red down arrow means significantly lower than compared data point. The absence of arrows mean the current measurement is on par with that from 2013 - the change was not statistically significant.

Reporting Scores on a Rating Scale

Top 3 Box [T3B]

VERY DISSATISFIED			NEITHER			VERY SATISFIED
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7

Top Box [TB]



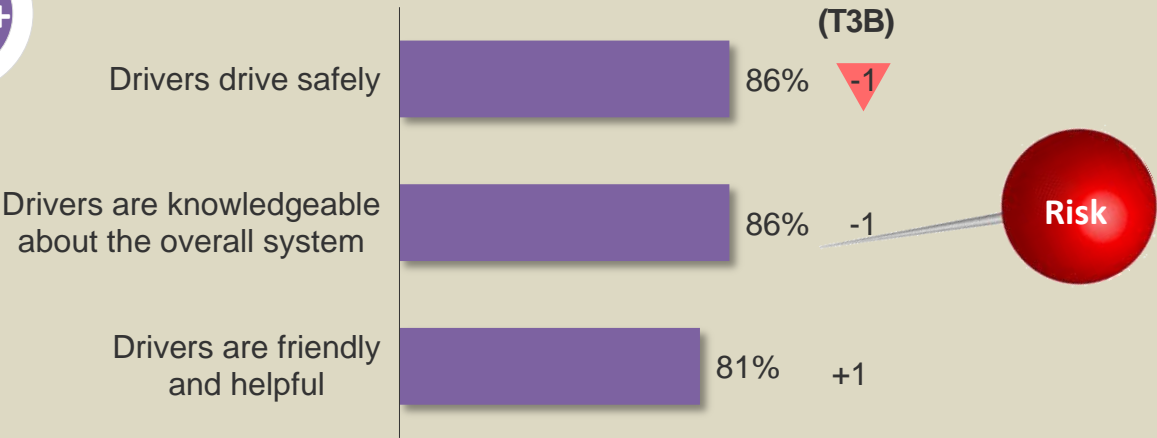
Indicates a significant increase or decrease compared to previous wave.

Transit Operators

Satisfaction with operator-related attributes remains high. These ratings are among the highest positive ratings MiWay received.

Satisfaction

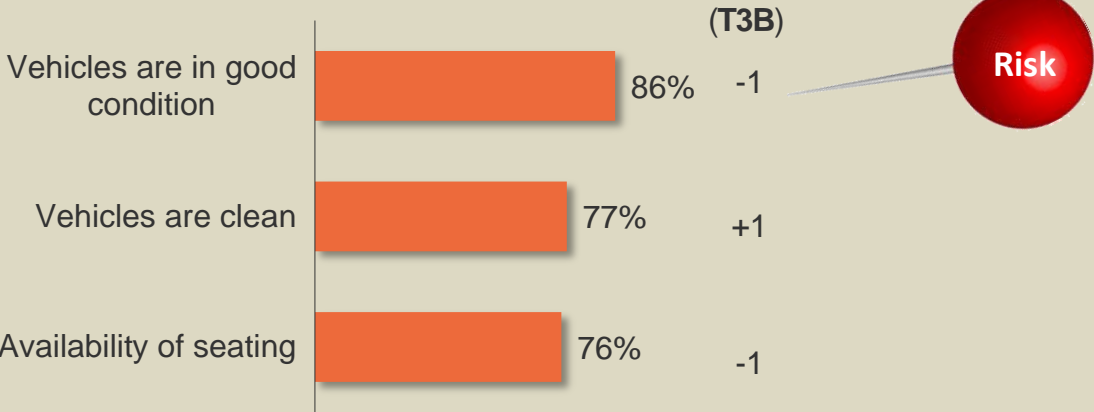
81%+



Vehicles

Satisfaction with vehicle-related attributes remains relatively high with no significant changes compared to 2013.

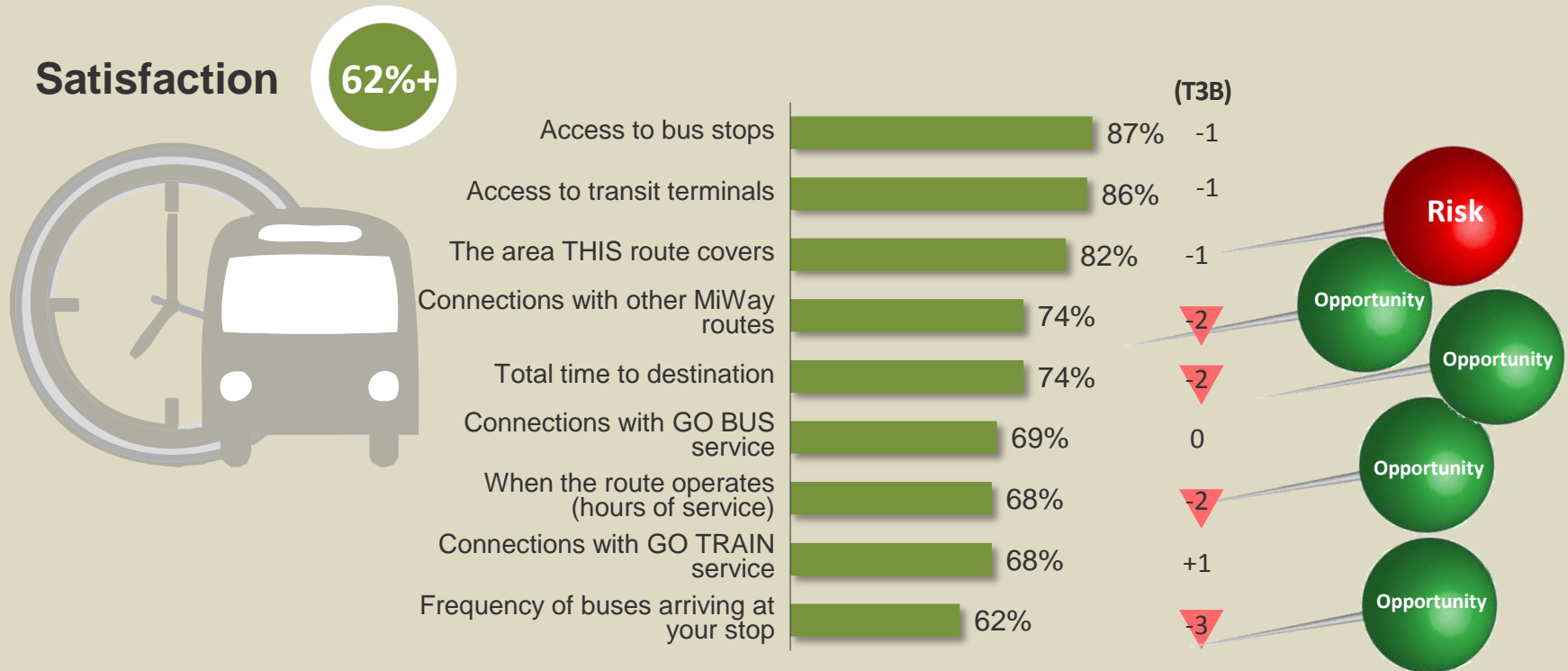
Satisfaction



Customer Experience

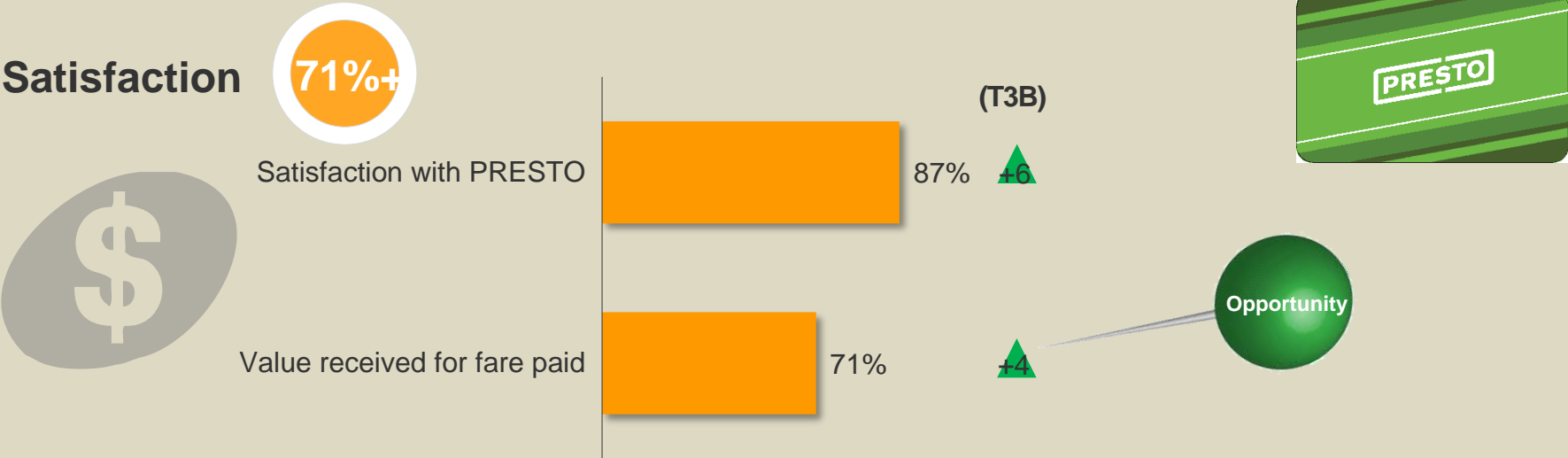
Routes, Schedules and Stops

Satisfaction with route-related factors remains generally high and consistent with 2013 scores, even though some slight declines are seen.



Fares

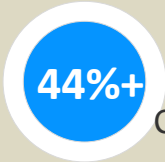
Satisfaction with value received for fare paid and with PRESTO increased since 2013.



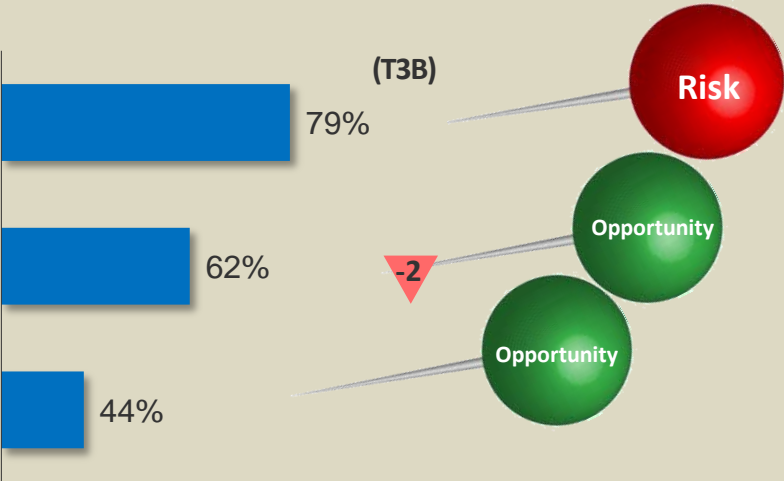
Customer Service

Satisfaction with customer service received by phone declined compared to 2013. Customer service at the City Centre Transit Terminal received a high satisfaction rating and is considered one of the most helpful services provided by MiWay.

Satisfaction

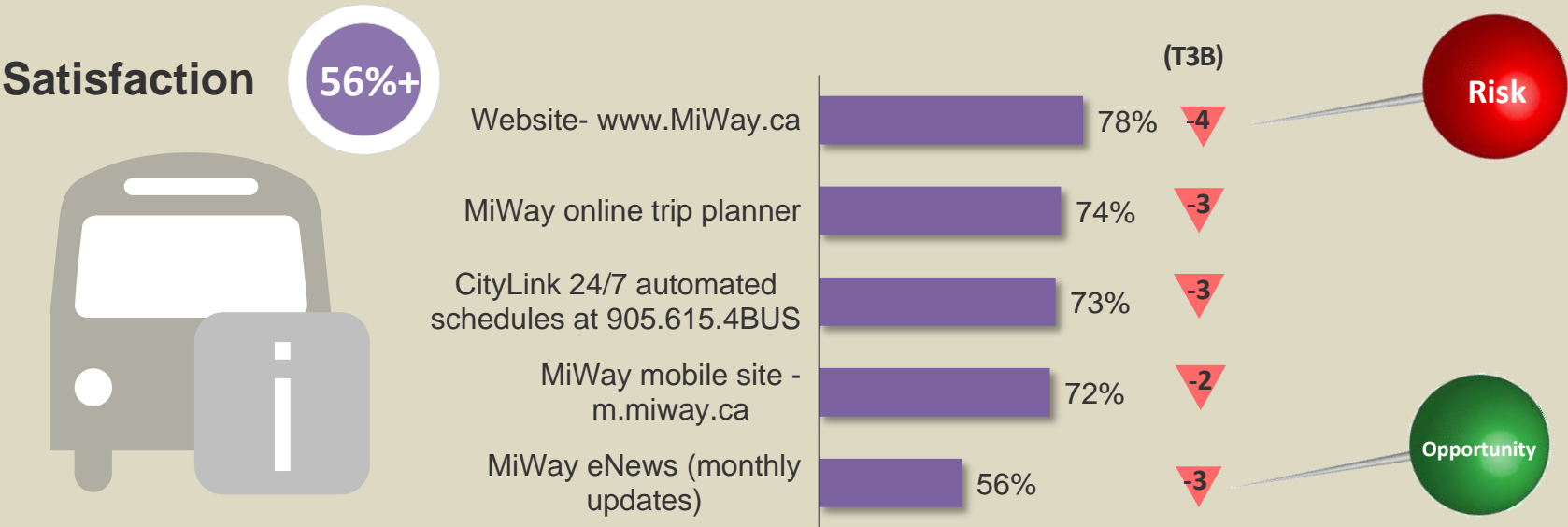


- Customer service received in person at City Centre Transit Terminal
- Customer service received by phone
- Customer service received through Twitter (@MiWayHelps)



Communication and Information Access

Satisfaction for both the MiWay website and MiWay eNews declined modestly compared to 2013. Most of these services are rated among the top 5 most helpful services provided by MiWay.

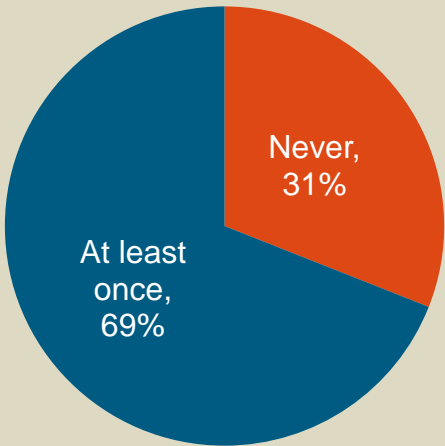


Mississauga Transitway

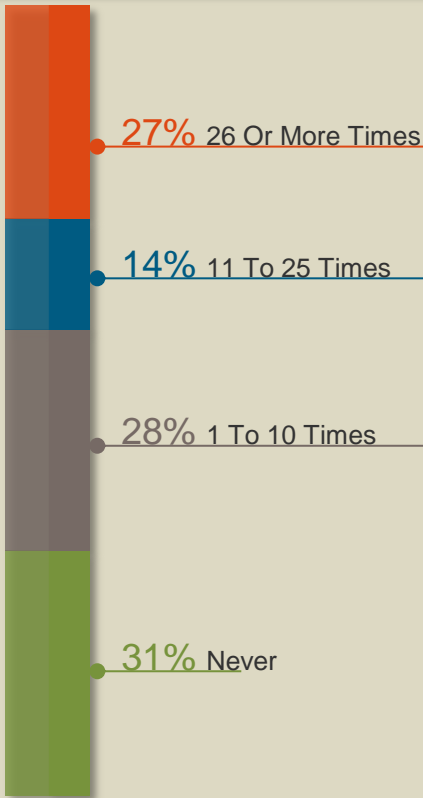
82%* of customers are satisfied with the Mississauga Transitway.

There is a positive relationship between the satisfaction levels with Mississauga Transitway and Overall Satisfaction with MiWay.

About seven in ten customers have travelled on the Mississauga Transitway at least once since November, 2014.

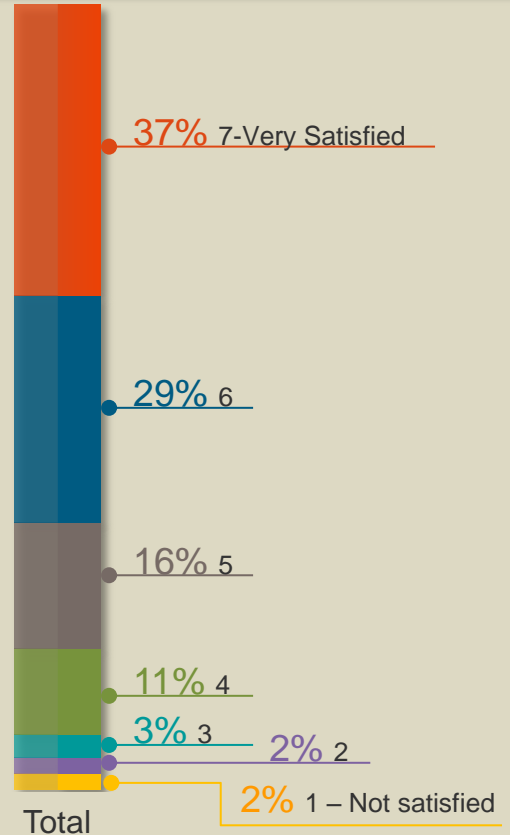


Just over one quarter of respondents report having used the Mississauga Transitway more than 25 times since it opened.



Total 2015
(n=11042)

Satisfaction with this new rapid transit service is high.

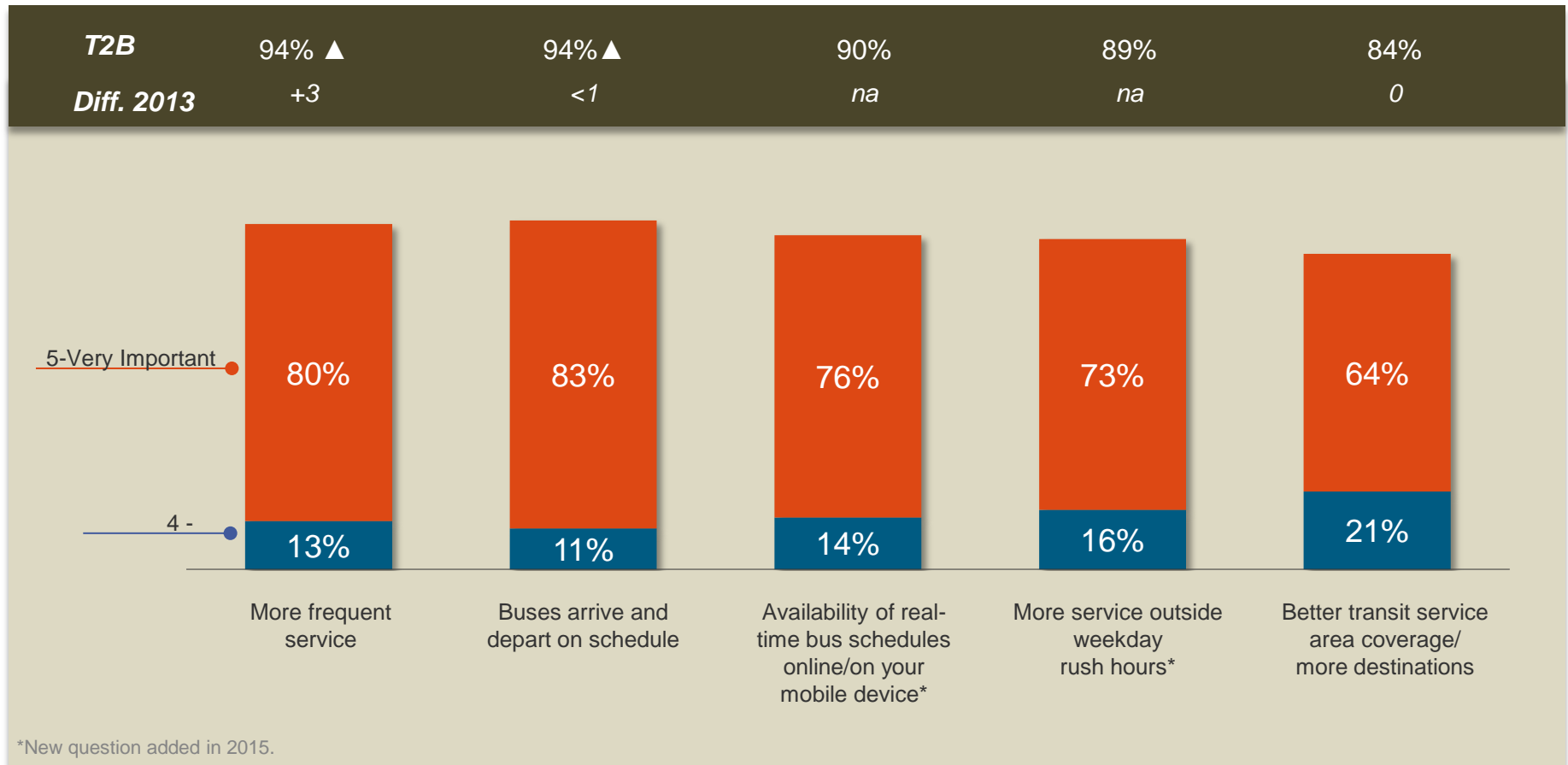


Total

*Base: Those who have travelled on the Mississauga Transitway at least once since November 2014

Top 5 Factors for Increasing Transit Use

More than nine in ten respondents rate more frequent service and buses arriving and departing on schedule as important or very important factors in encouraging use of public transit. These have increased in importance compared to 2013.



▲ ▼ Statistically significant vs. 2013.

Demographic Profile Summary: Total Sample



1/4 are new customers in the past year



44%

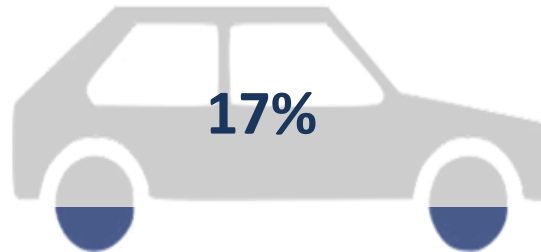


56%

60% are between ages 18 and 34

<18	10%	5%	95%
18-24	36%	51%	4%
25-34	24%	19%	-
35-44	13%	11%	-
45-54	10%	9%	-
55+	7%	5%	-

Car Owner



17%

HH Income

<\$50k



77% live in Mississauga

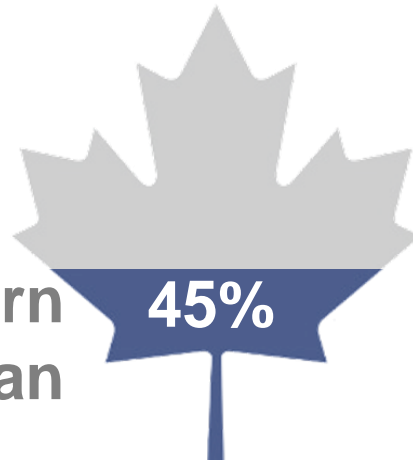


1/3 are students



58% are employed

Born Canadian



45%

40% are new residents (<5 years)

