

A wide-angle photograph of the Calgary skyline at dusk. Numerous skyscrapers are illuminated with warm yellow and blue lights, reflecting on the glass facades. The sky is a deep blue with some light clouds.

Calgary Transit – 2018 Monthly Tracker Presentation

Prepared for The City of Calgary by:

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enrg RESEARCH GROUP

Tracking period: Jan-18 to date

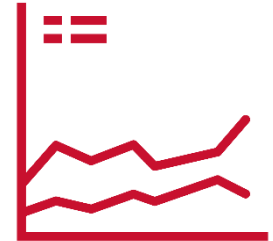
Survey duration: 13 minutes

Monthly sample: Stage 1 n=400 (all public); Stage 2 n=200 (transit users)

Target respondent: Used Calgary Transit in the past 7 days

Data collection/weighting: n=200 transit users. Calling is closely based on the distribution of transit users identified in stage 1 and where needed weights are used to ensure each month's sample is representative of Calgary Transit users within the population of Calgary.

Note: Due to a shift from annual to ongoing tracking, weighting data to the transit user base and collecting results from users who have specifically made a trip in the past week (as opposed to making at least one trip a week on average in the 12 months prior), results gathered from 2018 onwards are not directly comparable to previous years. As such, results for Q1 to Q4 have not been compared to historical data. Based on the first full year of tracking, it is evident the previous method over-estimated the proportion of the Calgary public using transit, and under-estimated the levels of satisfaction with services (which commonly occurs when clients average their ratings over an extended time period).



2018 Transit Usage Profile

2018 Calgary Transit Usage

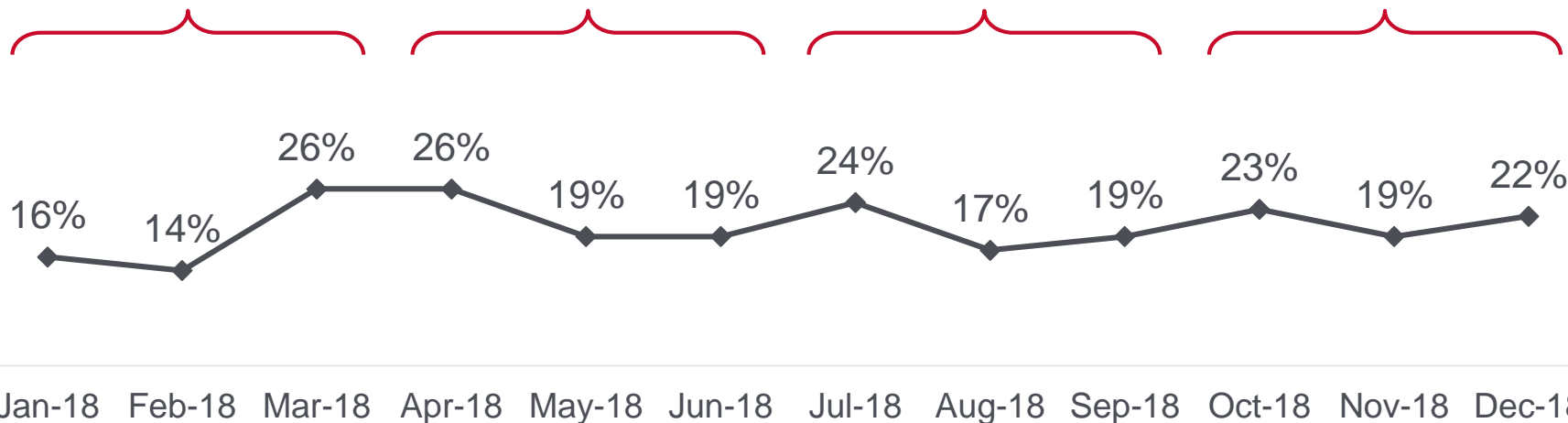
**Usage is calculated as the proportion of qualifying survey respondents. When taking into account those who hold passes or other pre-paid tickets the figures around transit users may be higher. These numbers are therefore reflective of active users. (Base n = 600 / month)*

Q1 Average:
17%

Q2 Average:
21%

Q3 Average:
20%

Q4 Average:
21%



~20%
of Calgarians
use Transit

Some fluctuations in usage do occur:

- Major events (i.e, in July for Stampede, 24%)
- Extreme cold and snow (generally results in lower usage)

Trip profile characteristics – 2018

Q. Approximately what time of day did you leave your place of origin / How long did the trip take from the time you left your place of origin till you arrived at your destination?
On which day of the week did you make your last trip?

Time of day left point of origin for trip

FIRST TRIP OF THE DAY

LAST TRIP OF THE DAY

5-7am 23%

7%

7-9am 23%

12%

9am-3pm 52%

20%

3-5pm 7%

52%

5-7pm 4%

10%

After 7pm

Base (2018 to date): n=1141

Base (2018 to date): n=1211

Total trip duration (minutes)



0-15, 18%



16-30, 34%



31-45, 25%



46-60, 14%



Over 60, 9%

52%

Base (2018 to date): n=2400

Day of the week travelled

13%

17%

17%

19%

23%

5%

4%



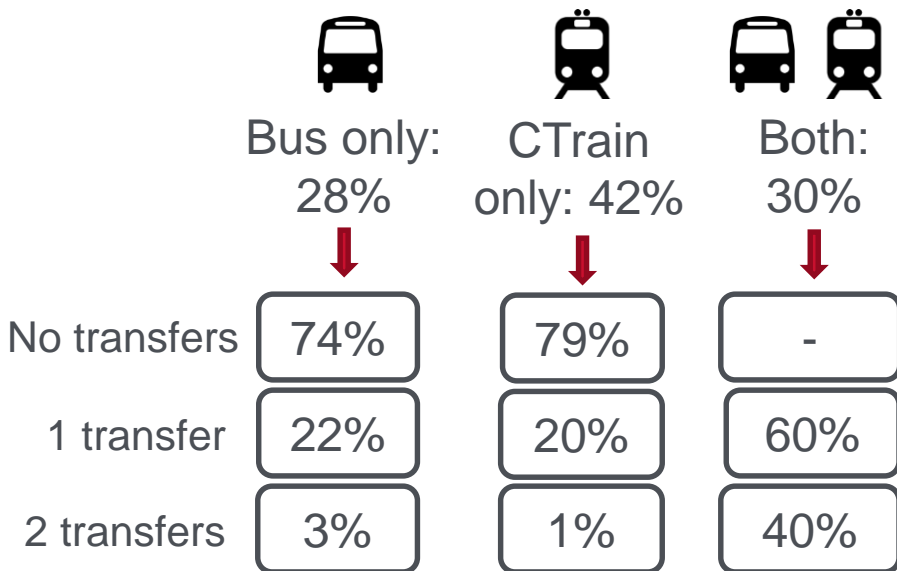
Base (2018 to date): n=2402

Trip profile characteristics – 2018 (continued)

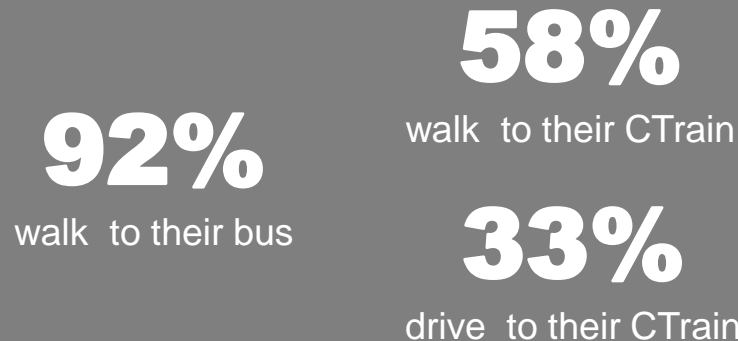
Q. On this trip did you use.. a bus (how many___), a CTrain (how many___)? How did you get to (Bus/CTrain) / Number of transfers used? / Which transit fare did you use to make your trip?

Transit types used / number of transfers

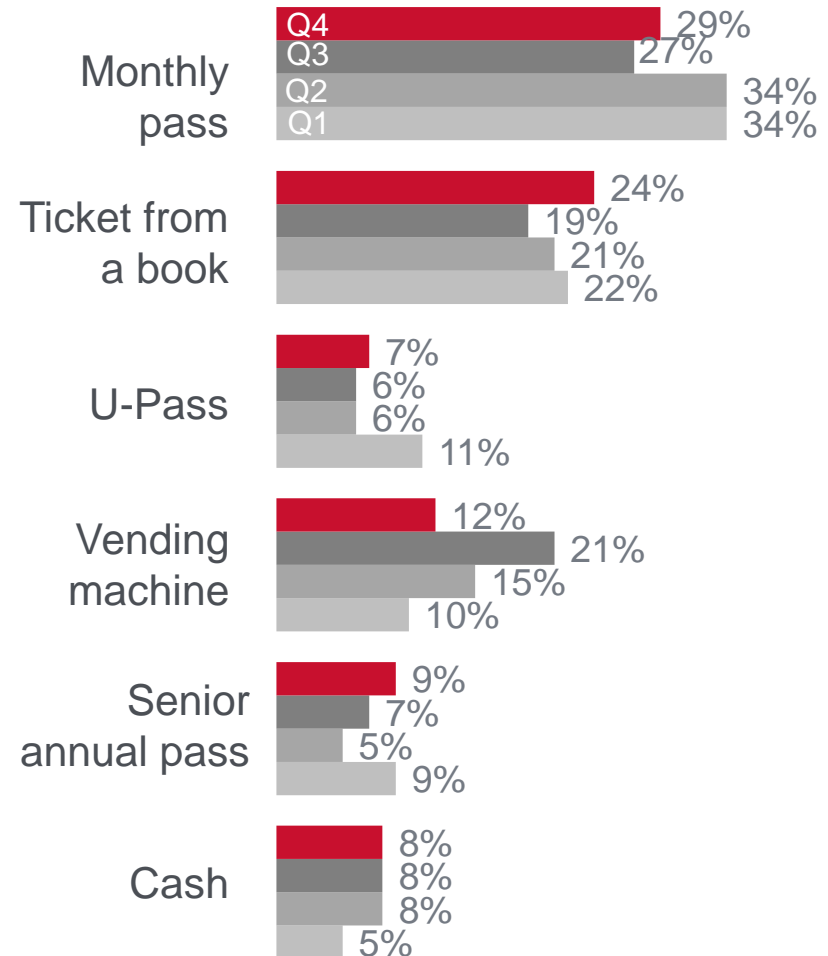
Base (2018 to date): n=2402



Mode of getting to first transit vehicle



Transit fares used



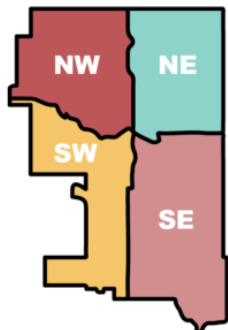
Base: Q1; n=601, Q2; n=598; Q3; n=601, Q4; n=599

Differences emerged between choice riders (users with access to a vehicle) and captive riders (users without access to a vehicle) in 2018.



Choice riders are more likely to;

- Be male (55% vs. 39% for captive riders)
- Be 35-54 (47% vs. 27%)
- Be employed full time (65% vs. 36%)
- Commute between 5-7am (18% vs. 11%)
- Use the CTrain exclusively (51% vs. 19%)
- Travel directly (i.e. 0 transfers 59% vs. 40%)
- Travel between 16 and 45 minutes (62% vs. 50%)



Differences also emerged in relation to the area of the city:

- Northeast
 - More likely to have trips with 2+ transfers (22% vs. 10-14% in other areas)
 - Trips involving both CTrains and buses (37%)
- Southeast:
 - Trips longer than 45 minutes are more typical (31%)
- Southwest:
 - Most likely to travel only on the CTrain (48%)

2018 Key Insights

88%

of users are
satisfied with
their trip (YTD)

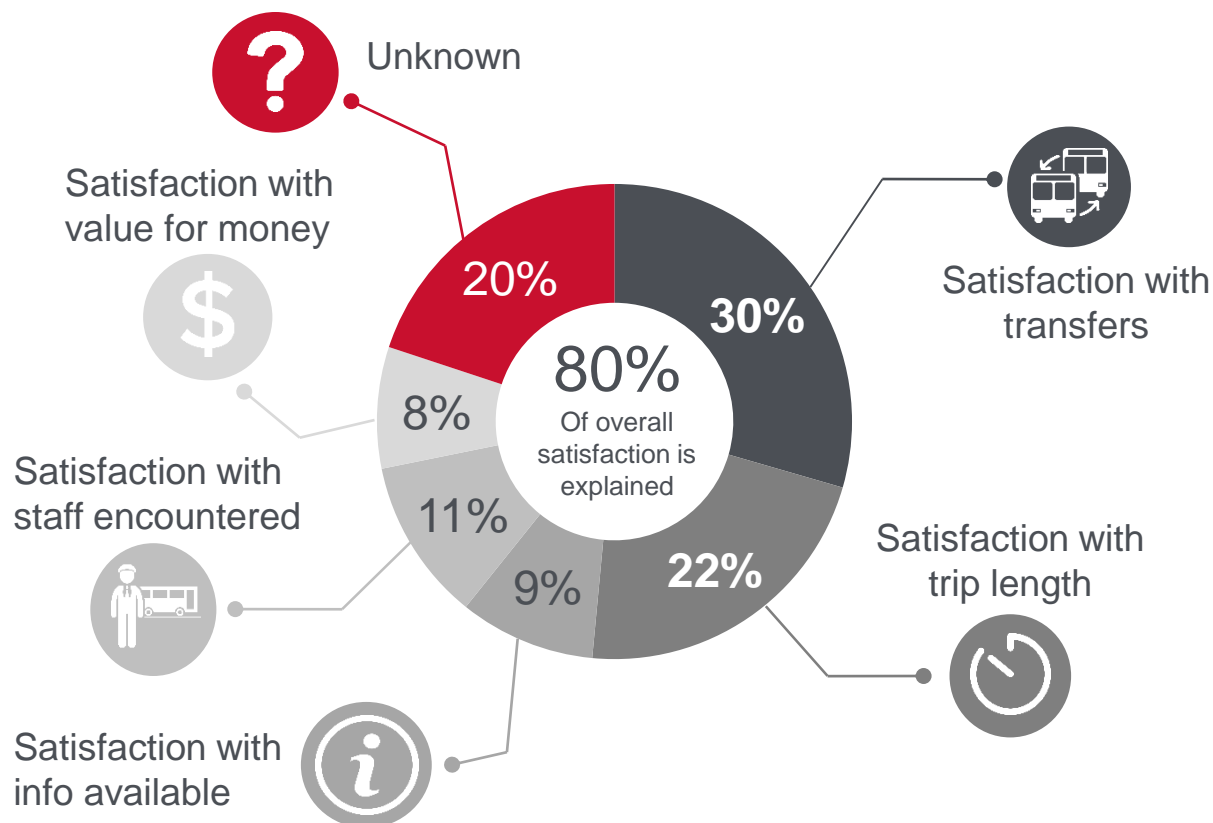
86%
Q1; n=599

90%
Q2; n=600

88%
Q3; n=598

88%
Q4; n=600

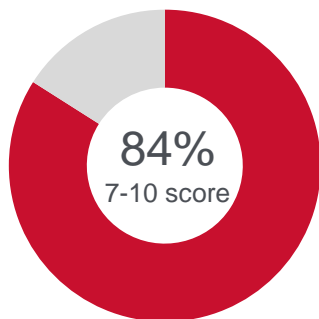
Key Drivers of Overall Satisfaction



Shapley regression analysis was used to look at the strength of the relationship between overall satisfaction with the trip and ratings for various dimensions of transit. Values reflect the % of the outcome that is explained by the variable (i.e., satisfaction with transfers explains 30% of overall trip satisfaction)

TRANSFER ISSUES

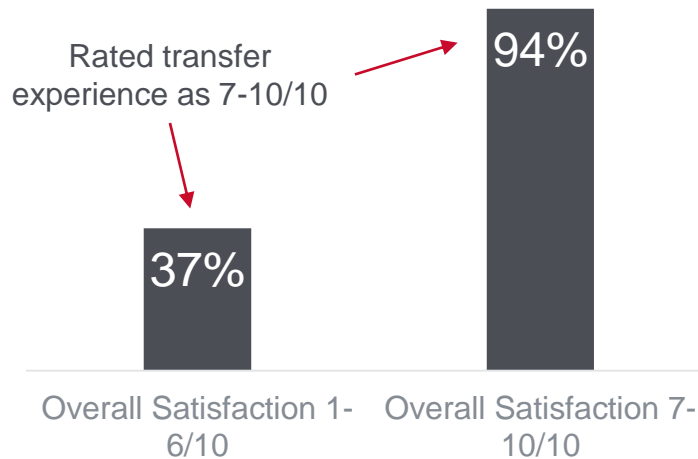
Q. On a scale of 1 to 10 where 1 is 'Very poor' and 10 is 'Very good', please rate your overall transfer experience on this trip



Base (2018 to date rotated): n=338

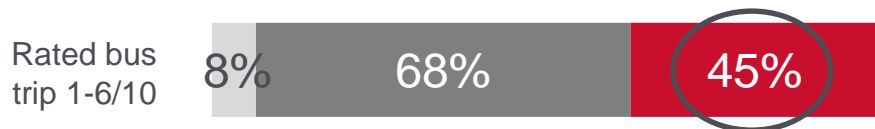
Trips with no transfers are more satisfying (91%) than those with multiple transfers (79% for 2 or more transfers)

Rated transfer experience as 7-10/10



PUNCTUALITY

Q. Please tell us if the bus was early, on-time, or late



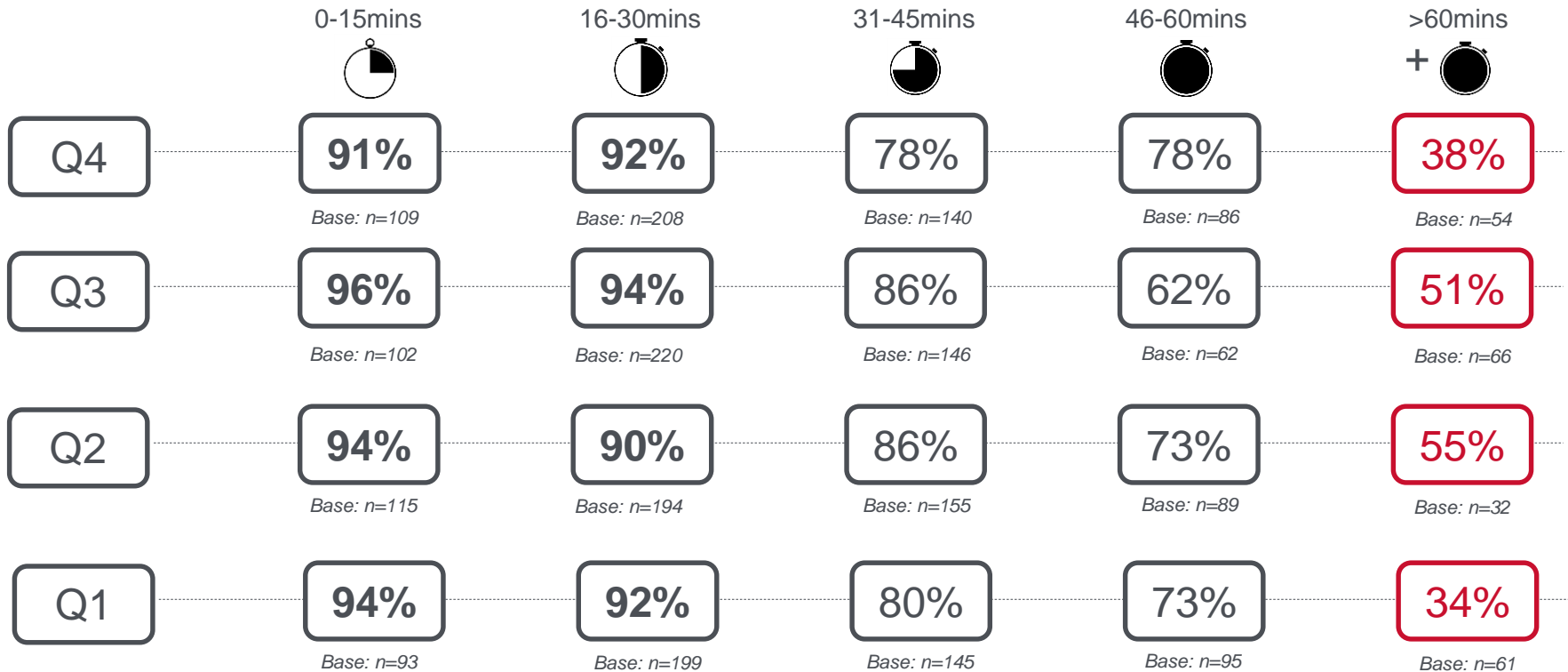
■ Early ■ On time ■ Late

Q. Did the CTrain(s) arrive on-time?



■ On time ■ Not on time

Satisfaction with trip length by time taken



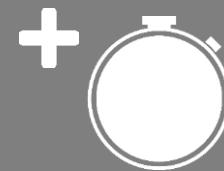
83%

are satisfied with the duration of their trip



94%

are satisfied with their overall trip experience for trips 15 minutes or less



68%

are satisfied with their overall trip experience for trips over 60 minutes

84%

of users are
satisfied with
their bus trip
(YTD)

82%
Q1; n=264

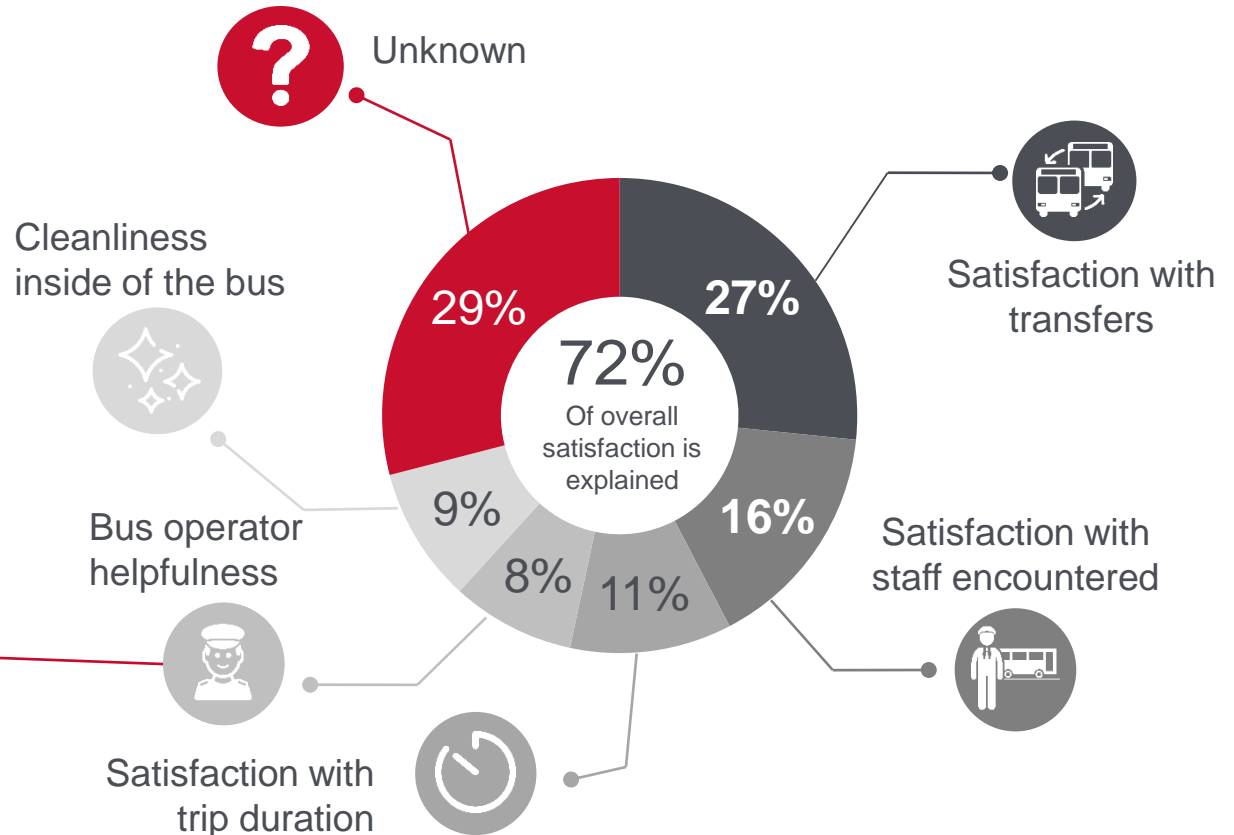
86%
Q2; n=238

85%
Q3; n=263

84%
Q4; n=273

Key Drivers of Bus Trip Satisfaction

89%
satisfaction with
staff encountered



Shapley regression analysis was used to look at the strength of the relationship between overall satisfaction with the bus trip and ratings for various dimensions of transit. Values reflect the % of the outcome that is explained by the variable (i.e., satisfaction with transfers explains 27% of overall trip satisfaction)

87%

of users are
satisfied with
their CTrain trip
(YTD)

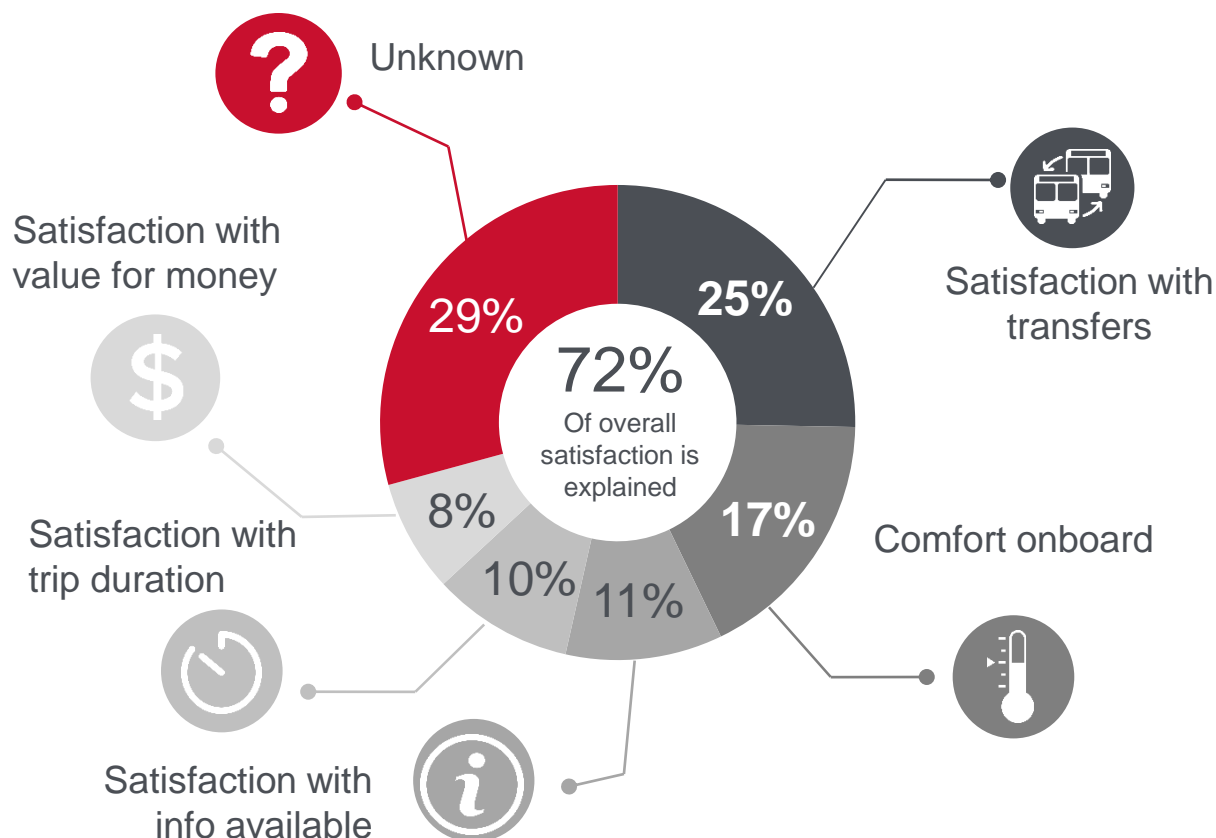
85%
Q1; n=336

89%
Q2; n=362

90%
Q3; n=334

85%
Q4; n=337

Key Drivers of CTrain Trip Satisfaction



Shapley regression analysis was used to look at the strength of the relationship between overall satisfaction with the CTrain trip and ratings for various dimensions of transit. Values reflect the % of the outcome that is explained by the variable (i.e., satisfaction with transfers explains 25% of overall trip satisfaction)

70%

of users are
satisfied with
the value for
money (YTD)

73%
Q1; n=432

70%
Q2; n=418

68%
Q3; n=412

67%
Q4; n=396

Value for Money was Highest Amongst:

Individuals 55+

Monthly pass holders/Book of 10

<15 minutes

Trips with 0 transfers

Buses/CTrains that were early/on-time

Value for Money was Lowest Amongst:

Individuals 18-34

Vending machine tickets

>60 minutes

Trips with 2+ transfers

Buses/CTrains that were late

86%

of users are
satisfied with
the info they
received (YTD)

83%
Q1; n=445

90%
Q2; n=479

87%
Q3; n=468

84%
Q4; n=445



1 in 3 (34%) used at least one tool
or information source to plan their
trip/track arrival times

85%

find the tools/sources
easy to use (rate them
a 7-10/10)



TOP 3 TOOLS/SOURCES USED

Base (2018 to date, valid responses, excludes those who do not use any tools, rotated question): n=289

CT Smartphone App

47%



Google Transit/
Google Maps

25%



Calgary Transit trip
planner/schedules on CT
website/CT Website

15%



2018 Service Division Results

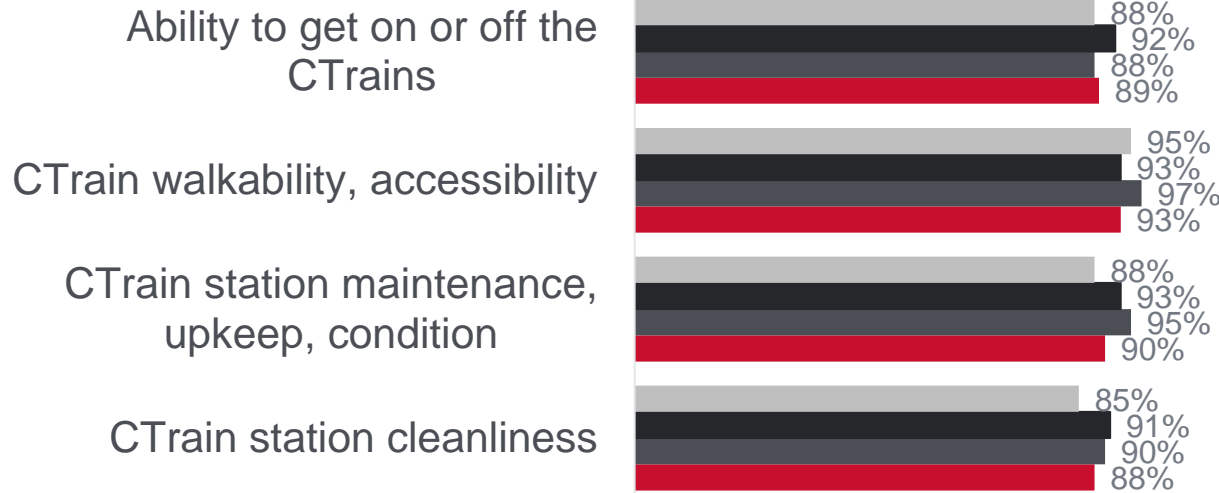
Q. On a scale from 1 to 10 where 1 is extremely poor and 10 is extremely good, please rate the following aspects of your trip



CTrain

Bases (valid responses): n=332-363

■ Q4 ■ Q3 ■ Q2 ■ Q1



Bus



■ Q4 ■ Q3 ■ Q2 ■ Q1 Bases (valid responses): n=229- 266

Top 4 box scores shown (gave a rating of 7-10/10)

Q. On a scale from 1 to 10 where 1 is extremely poor and 10 is extremely good, please rate the following aspects of your trip

Cleanliness of outside of the CTrains

Condition and mechanical soundness of the CTrains

Digital route signage readability on the front and back of CTrains

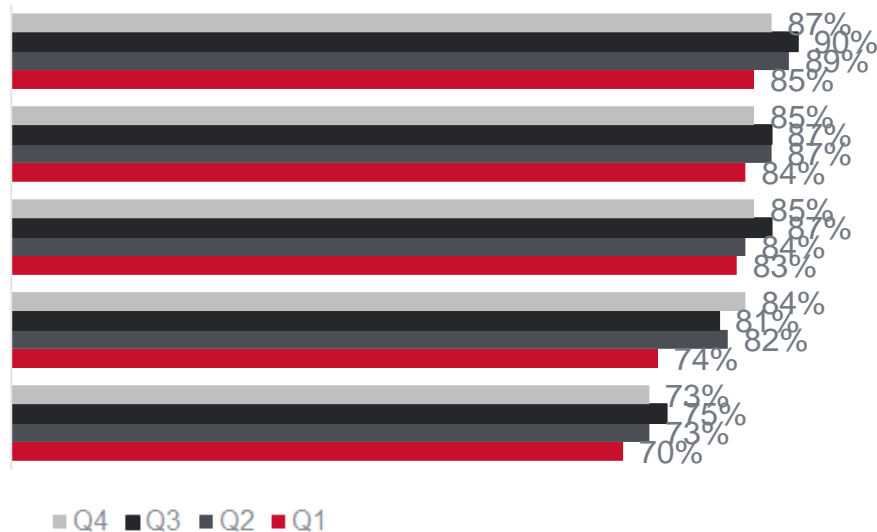
Cleanliness of inside of the CTrains

Audible announcements



CTrain

Bases (valid responses): n=294-363



Bus

Bases (valid responses): n=231-271

Condition and mechanical soundness of the bus or buses

Cleanliness of inside of the bus or buses

Cleanliness of outside of the bus or buses

Audible next stop announcements



Top 4 box scores shown (gave a rating of 7-10/10)

Q. On a scale from 1 to 10 where 1 is extremely poor and 10 is extremely good, please rate the following aspects of your trip



Bases (valid responses): n=164-272

■ Q4 ■ Q3 ■ Q2 ■ Q1

Bases (valid responses): n=62-93

Satisfaction scores shown are those who gave a rating of 7-10/10

Lighting levels/brightness on or in CTrain stations/platform

Sense of safety and security onboard the CTrains

Feeling of safety and security at CTrain stations



CTrain

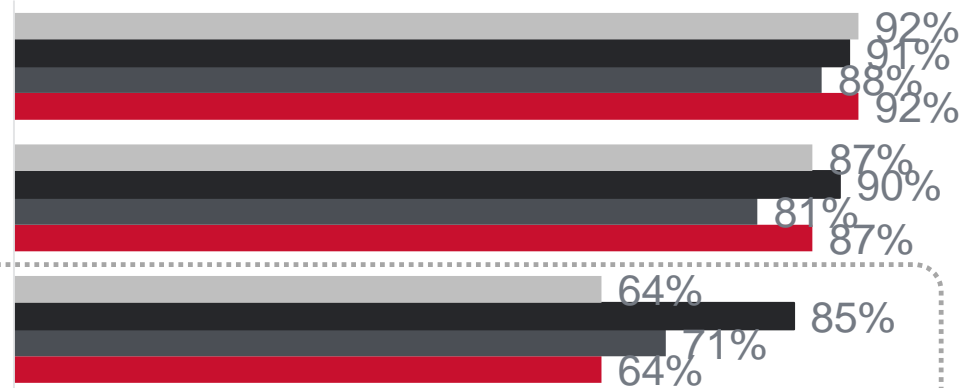
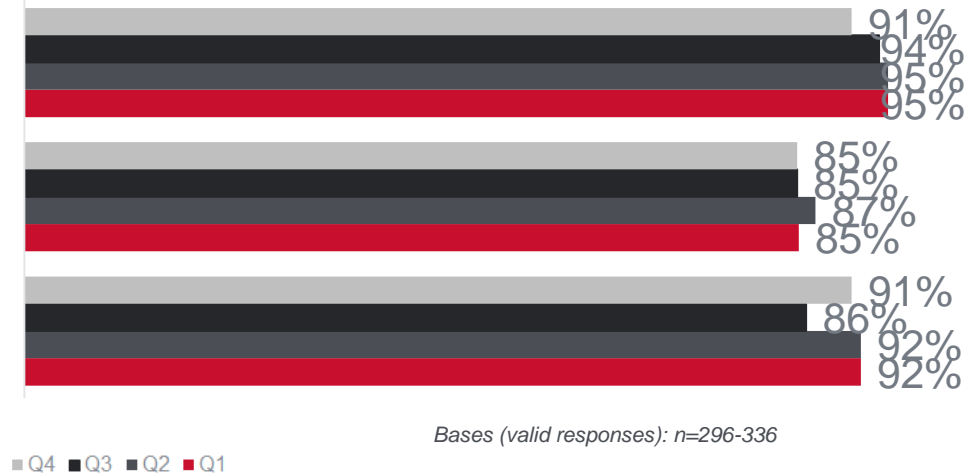


Bus

Sense of safety and security onboard the buses

Feeling of safety or security while waiting for the bus to arrive

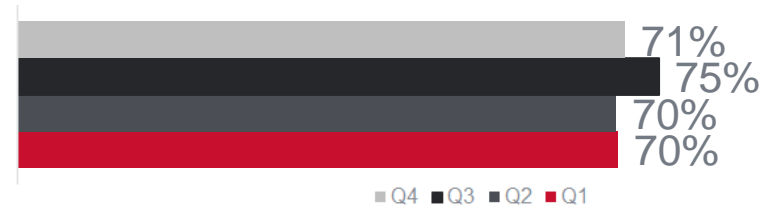
Lighting levels / brightness of bus stop waiting areas





CTrain

Comfort onboard the CTrains
(temperature, seating/standing, etc.)



Bus

Comfort onboard the buses
(temperature, seating/standing, etc.)



Bases (valid responses): CTrains; Q1: n=337, Q2: n=334, Q3: n=363; Q4: n=241. Buses; Q1: n=272, Q2: n=264, Q3: n=236; Q4: n=209

85%

Overall satisfaction
when CTrains are not
perceived as crowded

87%

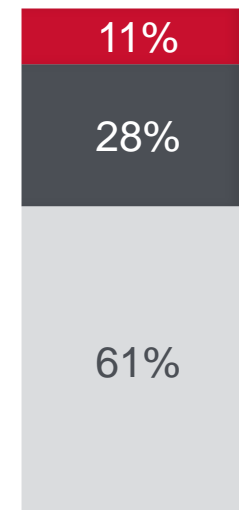
Overall satisfaction
when buses are not
perceived as crowded

Very overcrowded

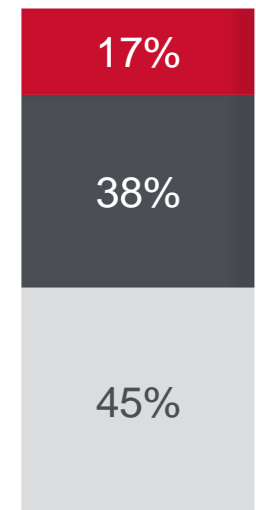
Slightly
overcrowded

Not crowded at all

Perceived
level of bus
crowding



Perceived level
of CTrain
crowding



Bases (valid responses 2018 to date): CTrains; n=1368, Buses; n=1035

Satisfaction scores shown are those who gave a rating of 7-10/10

A wide-angle photograph of the Calgary Bridge, a red steel arch bridge spanning the Bow River. The bridge's structure is prominent in the foreground, with its red steel beams and arches creating a strong geometric pattern. The river flows beneath the bridge, and the Calgary city skyline is visible in the background under a blue sky with scattered white clouds. A semi-transparent red horizontal band is overlaid across the middle of the image, containing the text "Where to Next?".

Where to Next?

What will we continue to explore / explore further in the months ahead?



Trip duration: In 2018, to date, top 4 box satisfaction with trip duration was strongest for trips lasting 30 minutes or less. A distinct pattern does emerge when examining trips lasting longer than 60 minutes. Specifically, top 4 box satisfaction was exceptionally low in Q1 (38%) and Q4 (34%), while it was slightly higher in Q2 (51%) and Q3 (55%). While results across all four quarters for these trips are weak, they do suggest that there may be a slightly higher tolerance for longer trips taken during summer months as compared to winter months (potentially aided by warmer outdoor temperatures).

Value for money: As the weakest performing overall satisfaction area this will be closely tracked for changes in the year ahead, particularly with respect to changes being made to the current transit offering (i.e., MAX routes). Results to date suggest that there are two factors that contribute to perceptions of value for money: personal benefits (i.e., faster and less complex travel, etc.), and financial aspects (i.e., quality of service compared to cost, savings on gas and parking, Transit pass, etc.). Overall, the ease of travel appears to have a significant impact on perceptions of value for money, along with age (which generally coincides with pass type). Value for money will be monitored closely in the following year to further develop key insights into the factors that directly influence value, along with determining the impact that changes to the Transit offering have on perceptions of value.



Punctuality and trip disruptions: Trips where buses/CTrains are not on time and/or riders experience disruptions consistently resulted in negative ratings of overall satisfaction. Specifically, if a rider's trip involved a late bus/CTrain, a delay or change in the trip, or they were in some way unhappy with their overall transfer experience, they were significantly more likely to give a lower overall trip rating. Year to date, results suggest that the ease of travel plays a significant role in overall trip satisfaction. This will be monitored over time to assess the impact of various changes being made.

Lighting/brightness of bus stop waiting areas: While this area greatly improved in Q3, a significant decrease was witnessed in Q4. This provides further support for the notion that shorter days in the winter months directly impact perceptions of lighting/brightness at bus stop waiting areas, as Q1 and Q4 produced comparable results. This suggests that additional lighting options may be considered during winter months to help improve satisfaction ratings.



