

2012 Customer Satisfaction Survey Final Report

June 28, 2013

**Building Customer Loyalty
Through**

Convenience; Courtesy; Cleanliness;
Communication; and Personal Security



Portfolio Associates, Inc.

Table of Contents

		Slide #
1	Methodology	2
2	Demographics	4
3	Key Findings & Interpretations	6
4	Overall Performance by Mode	8
5	Key Drivers of Satisfaction	10
6	Service Category Performance	12
7	Service Component Performance	13
8	Customer Expectation	17
9	Likelihood to Recommend SEPTA	18



Methodology

1. Conducted Phone Survey

- A. Surveyed random sample of households in Region for non-riders and riders
- B. Intercepted SEPTA riders at various locations to request phone numbers
- C. Quality control procedures to ensure data validity and reliability
- D. 1,210 riders provided 2,416 responses on individual modes

2. Survey Questions

- A. Matched 2010 questions
- B. Focus groups, phone tests and best practices research identified additional questions
- C. Riders were asked about experience in last seven days
- D. Survey was translated into Spanish for Spanish-speaking households



Completed Mode Interviews

Mode	Intercepts	Completions	Target
City Non-Rider		204	200
Suburban Non-Rider		202	200
Non-Rider Subtotal		406	
Broad Street Line	830	420	400
Market Frankford Line	804	415	400
City Bus	705	411	400
Suburban Trolley	353	210	200
Frontier Bus*	628	138	200
Victory Bus	528	202	200
City Trolley	403	216	200
Regional Rail	666	404	400
Rider Subtotal		2,416	
TOTAL	4,917	2,822	2,800

* Did not reach target



Rider Demographics

Location	%	N
Philadelphia	71%	858
Suburbs	29%	352
TOTAL	100%	1,210
Suburban Counties		
- Delaware	14%	167
- Montgomery	12%	139
- Chester	2%	28
- Bucks	1%	18
Suburban Total	29%	352

Age	%	N
18 to 25	19%	232
26 to 35	22%	264
36 to 45	20%	242
46 to 55	22%	262
56 to 65	12%	147
66 to 75	4%	50
75 or Older	1%	9
Refused	0%	4
TOTAL	100%	1,210



Rider Demographics

Household Income	%	N
Under \$15,000	13%	153
\$15,000 to <\$25,000	14%	165
\$25,000 to <\$35,000	14%	169
\$35,000 to <\$50,000	20%	239
\$50,000 to <\$75,000	14%	169
\$75,000 or More	14%	169
Don't Know/Refused	11%	146
TOTAL	100%	1,210

Ethnicity	%	N
White	27%	321
African-American/Black	57%	692
Asian	3%	33
Hispanic/Latino	5%	61
Other/Refused	8%	103
TOTAL	100%	1,210

Gender	%	N
Female	64%	780
Male	36%	430
TOTAL	100%	1,210



Key Findings

1. The average satisfaction rating for all modes is greater than 2008 (7.2 vs. 7.7)
2. Satisfaction with service is down since 2010
 - The average satisfaction rating for all modes decreased (from 7.9 to 7.7)
 - All overall service categories decreased (4Cs and Personal Security)
 - 24 out of 25 overall service components decreased (for those common to all modes)
 - City Bus experienced the greatest decrease in satisfaction for any mode (from 7.4 to 7.0)
 - Regional Rail experienced an increase in satisfaction (from 7.9 to 8.3)
3. Key drivers of satisfaction
 - The Convenience service category was the most important driver of overall satisfaction for a given mode
4. Almost 1 in 2 riders (45%) expect more from SEPTA than they did two years ago
 - Those who expect more ranked SEPTA lower (7.1 – rating of overall general performance)
 - Those who expect the same ranked SEPTA higher (7.8 – rating of overall general performance)
5. Likelihood to recommend SEPTA to a family member, friend, or co-worker
 - Both ratings from Riders and Non-Riders increased from 2010 to 2012
 - Ratings from Riders increased from 8.3 to 8.4 and ratings from Non-Riders increased from 7.5 to 7.9

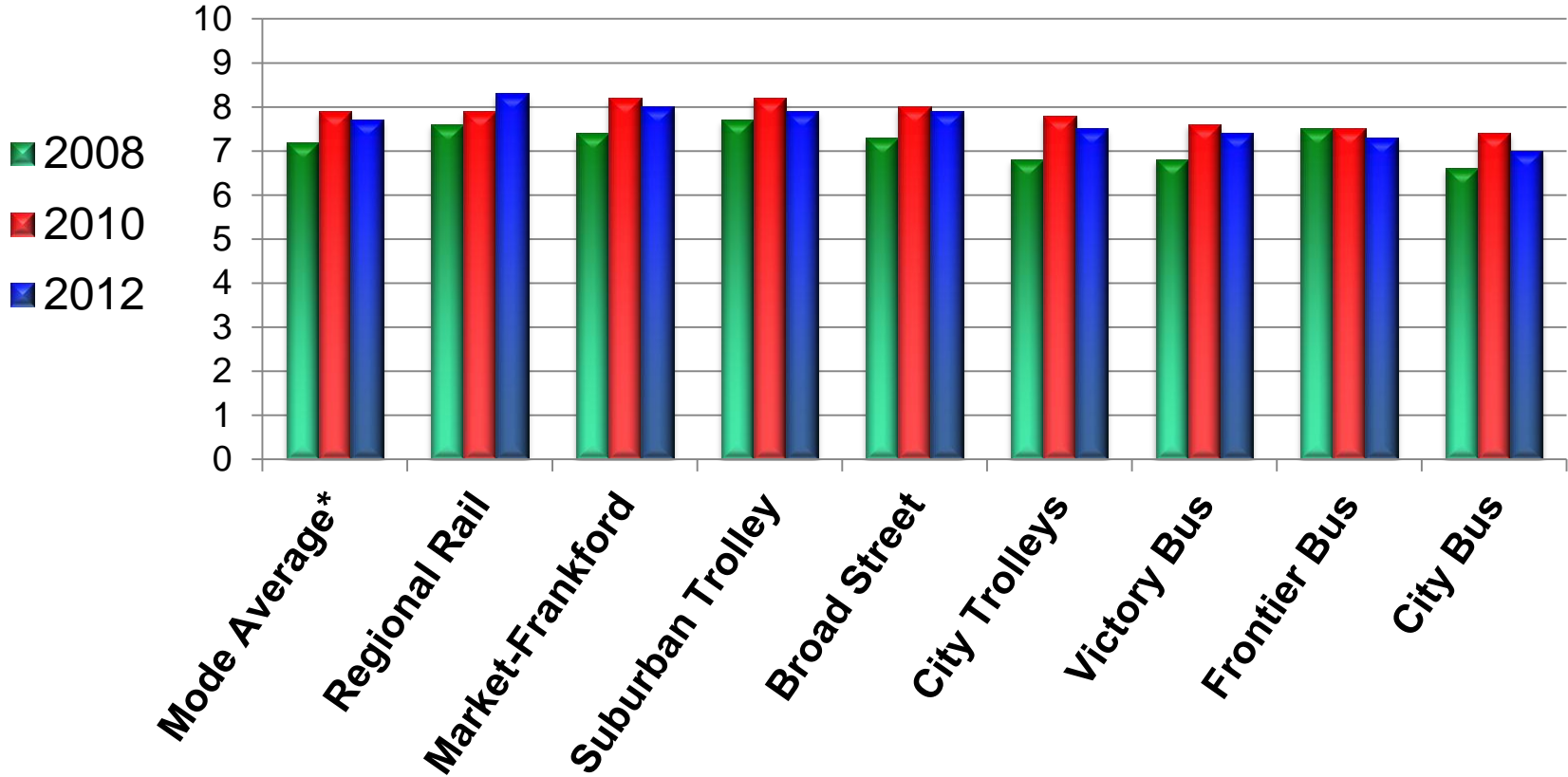


Interpretations

1. Capital improvements can increase satisfaction
 - Satisfaction ratings increased for Regional Rail, where new rail cars and key stations upgrades came online
 - The 2010 survey showed satisfaction increases for Market-Frankford and Suburban Trolley after major improvements to infrastructure
2. Higher customer expectations are linked to lower satisfaction ratings





Overall Performance by Mode





*2008 – Average of Averages,
2010, 2012 – Average of Ratings



Overall Performance by Mode

	'08	'10	'12	Diff.	Statistical Significance
Mode Average - SEPTA	7.2	7.9	7.7	-0.2	*
 Regional Rail	7.6	7.9	8.3	0.4	*
Market-Frankford	7.4	8.2	8.0	-0.2	NS
Suburban Trolley	7.7	8.2	7.9	-0.3	NS
Broad Street	7.3	8.0	7.9	-0.1	NS
City Trolleys	6.8	7.8	7.5	-0.3	NS
Victory Bus	6.8	7.6	7.4	-0.2	NS
Frontier Bus	7.5	7.5	7.3	-0.2	NS
 City Bus	6.6	7.4	7.0	-0.4	*

The Statistical Significance column notes whether the change in rating falls within the statistical margin of error based on the number of survey respondents who answered that question.

 Greatest increase from '10
 Greatest decrease from '10

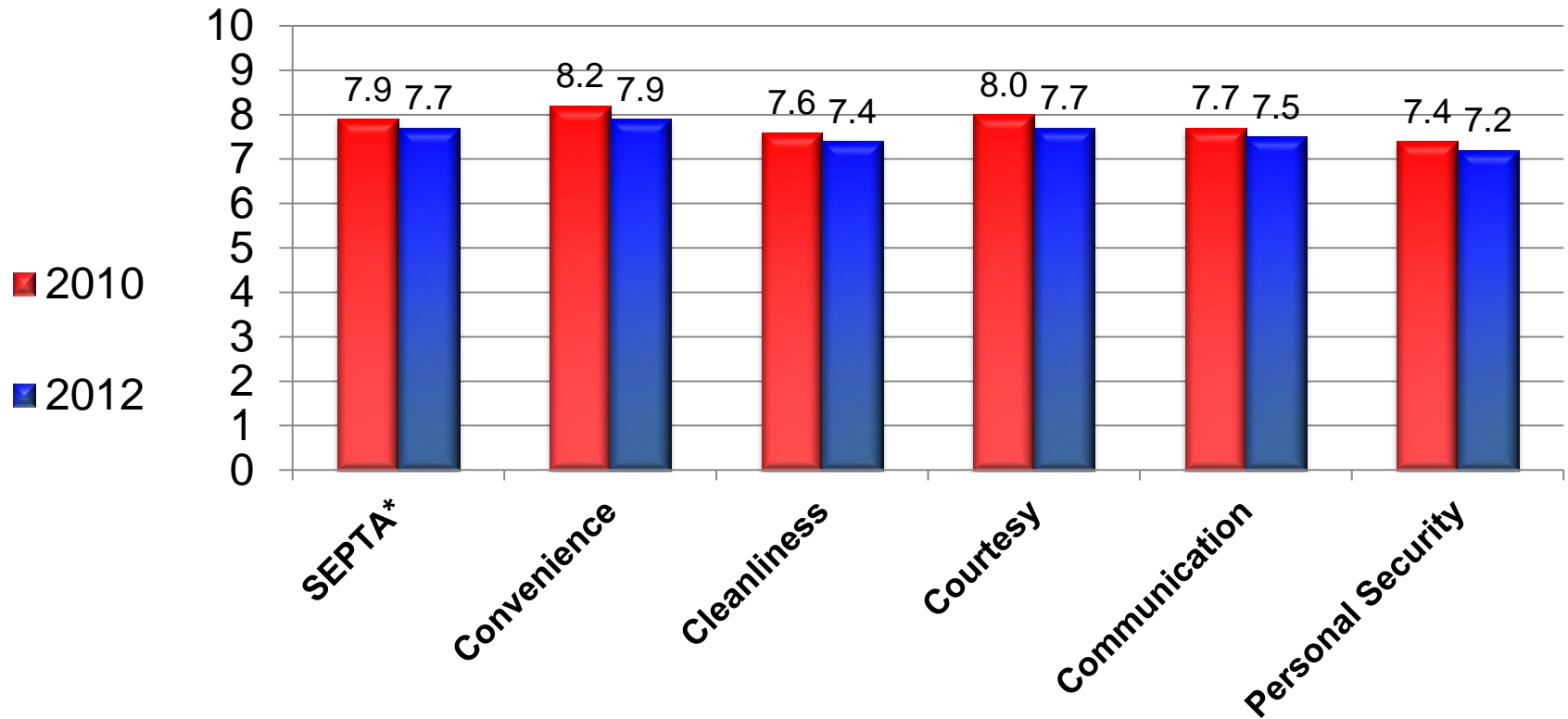
Key Drivers of Satisfaction (Importance)

1. The Convenience service category was the most important driver of overall satisfaction for a given mode. The greatest key drivers of Convenience were:
 - Reliability
 - Picking up According to Schedule
2. Courtesy is a more important driver of satisfaction than two years ago, and is a significant key driver for four modes.

SEPTA Overall Service Categories – Importance

	Imp. '10	Imp. '12	Diff.
Overall Convenience	0.47	0.49	0.02
Overall Cleanliness	0.14	0.10	-0.04
Overall Courtesy	0.11	0.17	0.06
Overall Communication	0.08	0.08	0
Overall Personal Security	0.08	0.07	-0.01

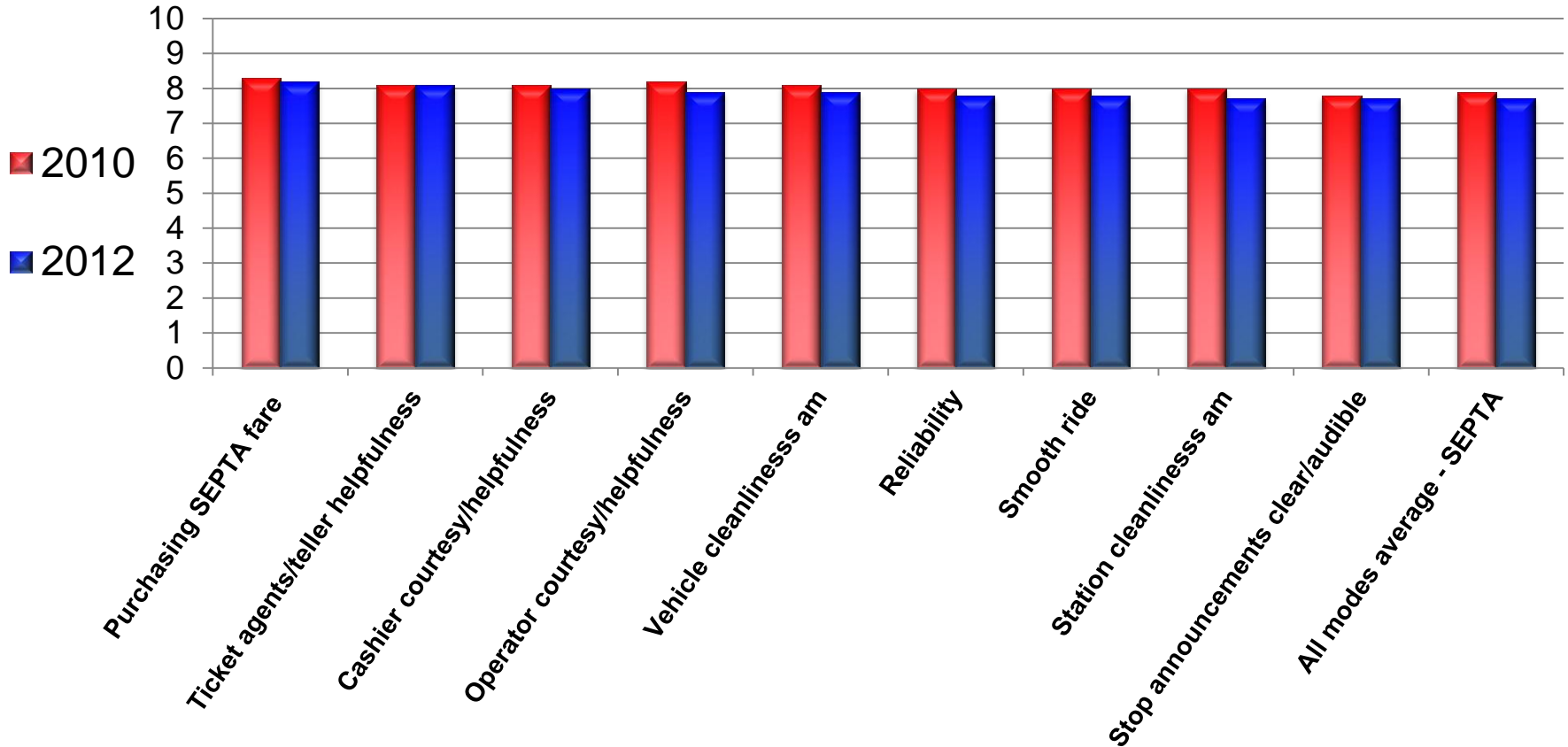
SEPTA Overall Service Categories – Satisfaction Rating



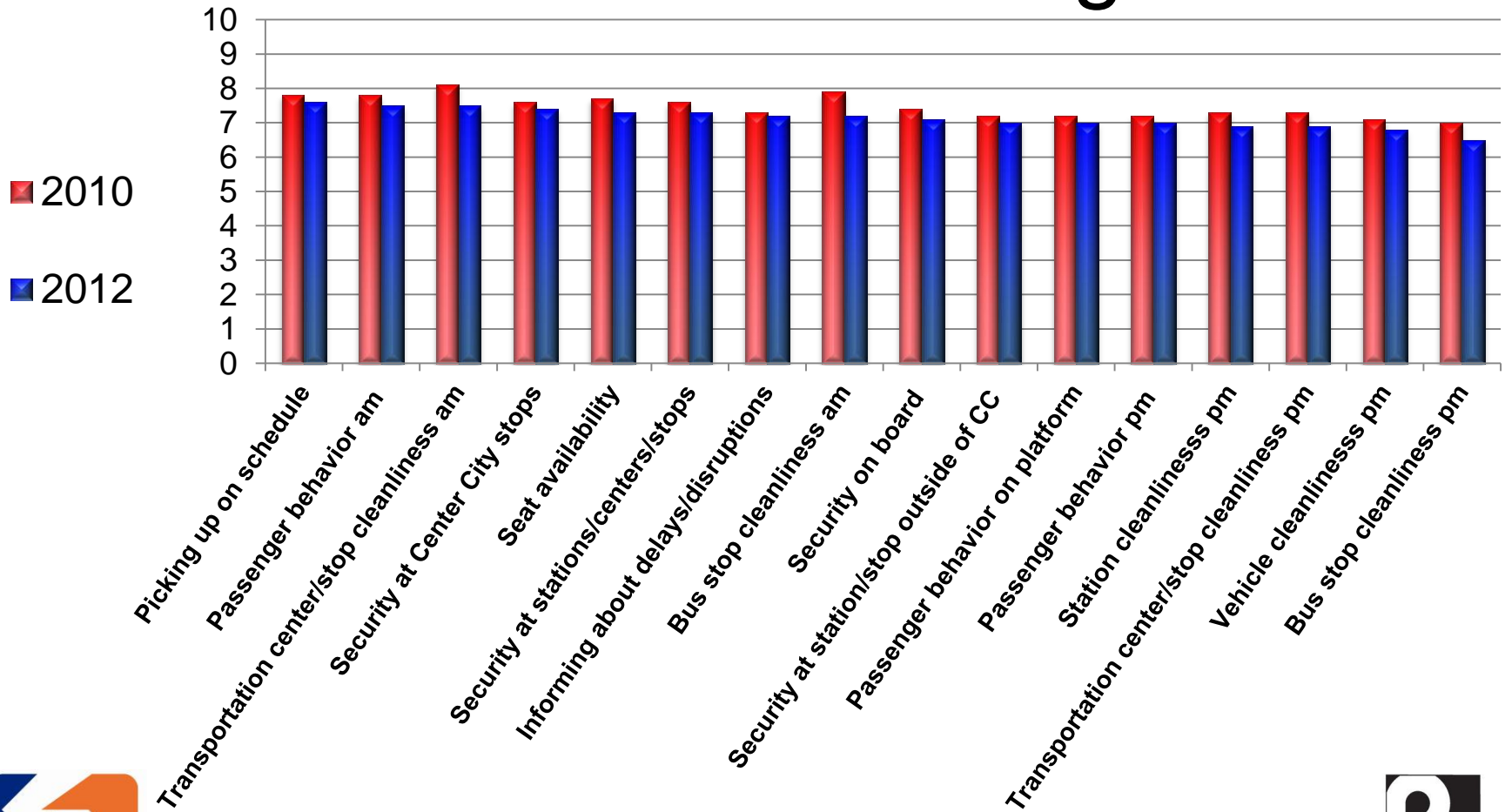
*All modes average



SEPTA Overall Service Components – Satisfaction Rating



SEPTA Overall Service Components – Satisfaction Rating



SEPTA Overall

	Imp.	'10	'12	Diff.
Mode Average - SEPTA		7.9	7.7	-0.2
Overall Convenience	0.49	8.2	7.9	-0.3
- Reliability	0.30	8.0	7.8	-0.2
- Picking up on schedule	0.23	7.8	7.6	-0.2
- Seat availability	0.18	7.7	7.3	-0.4
- Purchasing SEPTA fare	0.15	8.3	8.2	-0.1

	Imp.	'10	'12	Diff.
Overall Cleanliness	0.10	7.6	7.4	-0.2
- Vehicle am	0.45	8.1	7.9	-0.2
- Vehicle pm	0.43	7.1	6.8	-0.3
- Station/terminal am		8.0	7.7	-0.3
- Station/terminal pm		7.3	6.9	-0.4
- Bus stop pm		7.0	6.5	-0.5
- Bus stop am		7.9	7.2	-0.7
- Transportation center/stop am		8.1	7.5	-0.6
- Transportation center/stop pm		7.3	6.9	-0.4

Imp. – Importance

Diff. – 2010 vs. 2012

Importance column includes only attributes asked of all modes

SEPTA Overall

	Imp.	'10	'12	Diff.
Overall Courtesy	0.17	8.0	7.7	-0.3
- Passenger behavior pm	0.34	7.2	7.0	-0.2
- Smooth ride	0.33	8.0	7.8	-0.2
- Passenger behavior am	0.21	7.8	7.5	-0.3
- SEPTA sales		8.1	8.0	-0.1
- Ticket agent/teller		8.1	8.1	0
- Operator/train crew		8.2	7.9	-0.3
- Passenger behavior on platform		7.2	7.0	-0.2

	Imp.	'10	'12	Diff.
Overall Communication	0.08	7.7	7.5	-0.2
- Inform delays/disruptions	0.46	7.3	7.2	-0.1
- Stop announce clear	0.44	7.8	7.7	-0.1
Overall Personal Security	0.07	7.4	7.2	-0.2
- On board	0.85	7.4	7.1	-0.3
- Center City stops		7.6	7.4	-0.2
- Outside of CC		7.2	7.0	-0.2
- Stations/centers/stops		7.6	7.3	-0.3

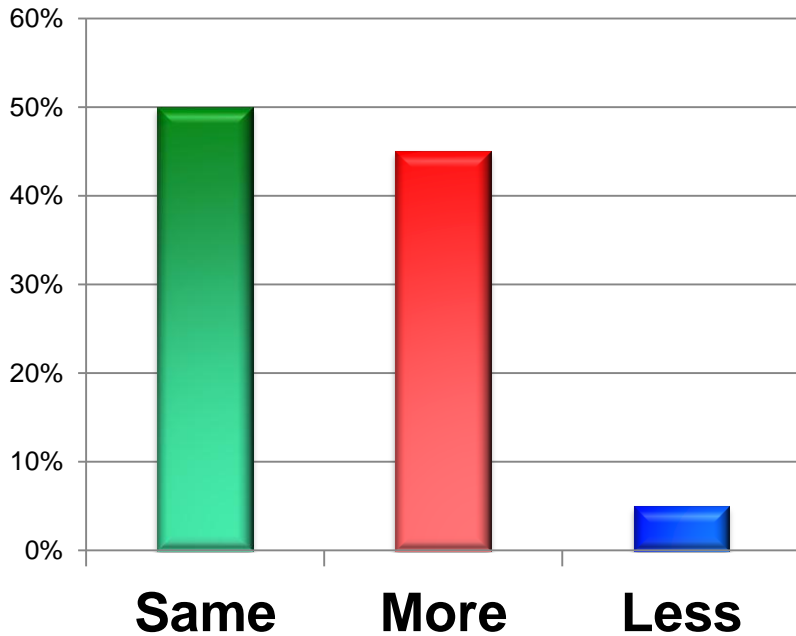
Imp. – Importance

Diff. – 2010 vs. 2012

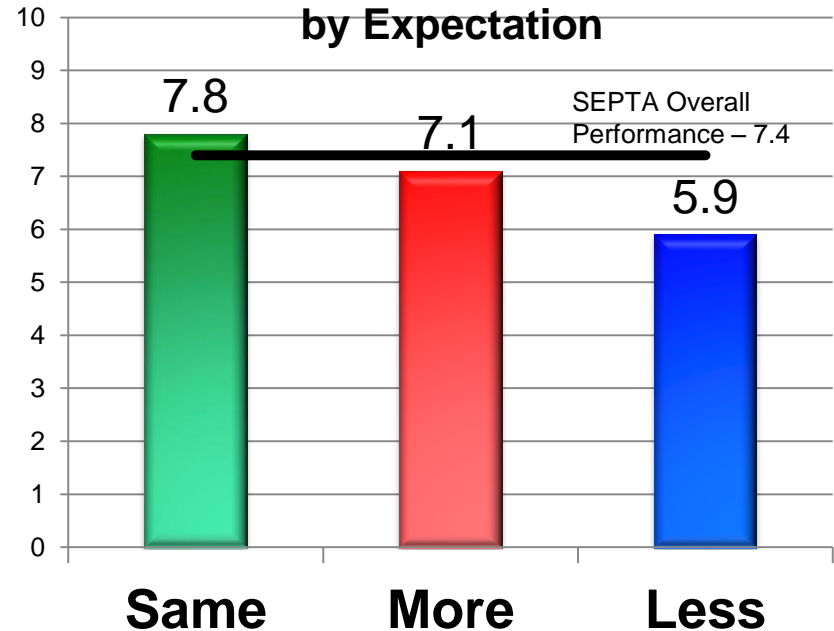
Importance column includes only attributes asked of all modes

Customer Expectation

Expect of SEPTA



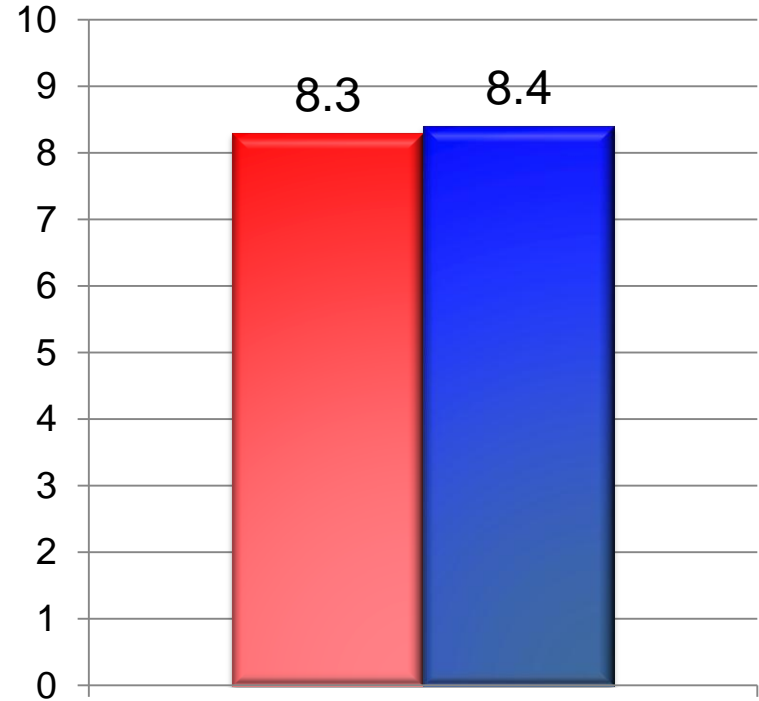
SEPTA Overall General Performance by Expectation



Likelihood to Recommend SEPTA — Riders

	'10	'12	Diff.
Likelihood to recommend SEPTA	8.3	8.4	0.1

Diff. – 2010 vs. 2012



Likelihood to recommend SEPTA

■ 2010 (N=1,412)

■ 2012 (N=1,210)

