



2010 Customer Satisfaction Survey SEPTA Overall Report

Building Customer Loyalty
Through

Convenience; Courtesy; Cleanliness;
Communication; and Personal Security



Portfolio Associates, Inc.

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Executive Summary



- All modes and SEPTA overall experienced similar or higher satisfaction from 2008
- Perceptions of *Convenience* were generally more important to customer satisfaction than were the other four customer service categories (*Cleanliness, Communication, Courtesy, Personal Security*). *Convenience* was generally a strength to leverage on SEPTA overall and across modes, though it was a critical issue in need of attention on Frontier Bus and City Bus.
- *Security* components are particularly critical on the urban modes. All three components (*On Board, Stations in Center City, Stations Outside Center City*) are critical issues for the Market Frankford and Broad Street Lines.
- *Informing about Delays/Disruptions* was identified as a critical issue in need of attention on every mode except Suburban Trolley. While it experienced relatively high increases in satisfaction ratings from 2008 on five modes, it was also the component which most frequently experienced the lowest satisfaction rating in the 2010 survey.



Executive Summary



- *Clarity of Stop Announcements* was important across modes, though satisfaction levels vary. This was a critical issue for Broad Street Line, City Bus and Regional Rail, and it was a strength to leverage for Frontier and Victory Bus, the Market Frankford Line, and Suburban Trolley. This component experienced relatively high satisfaction increases from 2008 for the two suburban bus modes.
- Customers report different experiences for morning and evening cleanliness. *AM Vehicle* and *AM Station Cleanliness* were frequently strengths to leverage, and these components saw relatively high satisfaction increases from 2008. *PM Vehicle* and *PM Station Cleanliness* were frequently critical issues in need of attention in 2010.
- Cleanliness is particularly critical for the two subway lines, though their challenges are different. *Vehicle Cleanliness*, both in the AM and PM, were critical issues for Market Frankford, while *Station Cleanliness*, both in the AM and PM, were critical issues for Broad Street.
- *Purchasing Fare* was one of the highest rated components across multiple modes, though it experienced some of the smallest increases in ratings from 2008.



Methodology



- Conducted Phone Survey
 - Surveyed random sample of households in Region for riders and non-riders
 - Surveyed SEPTA riders
 - Intercepted at stations/stops and asked for phone numbers
 - Surveyed customers within three days of intercept
 - Quality control procedures to ensure data validity and reliability
- Survey Questions
 - Matched 2008 questions where possible
 - Focus groups, phone tests and best practices research identified additional questions
 - Riders were asked about experience in last seven days



Completed Mode Interviews



Mode	Intercepts	Completions	Target
City Non-Rider		203	200
Suburban Non-Rider		200	200
Broad Street Line	698	402	400
Market Frankford Line	771	406	400
City Bus	374	414	400
Suburban Trolley	571	201	200
Frontier Bus*	703	74	200
Victory Bus*	658	148	200
City Trolley	466	209	200
Regional Rail	812	402	400
TOTAL	5053	2659	2800

* Did not reach target



Rider Demographics



Location	%	N
Philadelphia	66%	935
Suburbs	34%	477
TOTAL		1,412
Suburban Counties		
- Delaware	18%	252
- Montgomery	12%	169
- Chester	2%	28
- Bucks	2%	28
Suburban Total	34%	477



Rider Demographics



Category	Subcategory	%	N
Household Income	Under \$15,000	15%	209
	\$15,000 to <\$25,000	15%	210
	\$25,000 to <\$35,000	16%	230
	\$35,000 to <\$50,000	18%	261
	\$50,000 to <\$75,000	12%	172
	\$75,000 or More	13%	190
	Don't Know/Refused	11%	140
	TOTAL		1,412



Rider Demographics



Category	Subcategory	%	N
Age	18 to 25	22%	309
	26 to 35	20%	280
	36 to 45	19%	263
	46 to 55	21%	304
	56 to 65	12%	171
	66 to 75	4%	51
	75 or Older	2%	27
	Refused	--	7
	TOTAL		1,412



Rider Demographics



Category	Subcategory	%	N
Ethnicity	White	29%	416
	African-American/Black	56%	784
	Asian	3%	36
	Hispanic / Latino	4%	60
	Other/Refused	8%	116
	TOTAL	100%	1,412
Gender	Female	63%	894
	Male	37%	519
	TOTAL	100%	1,412



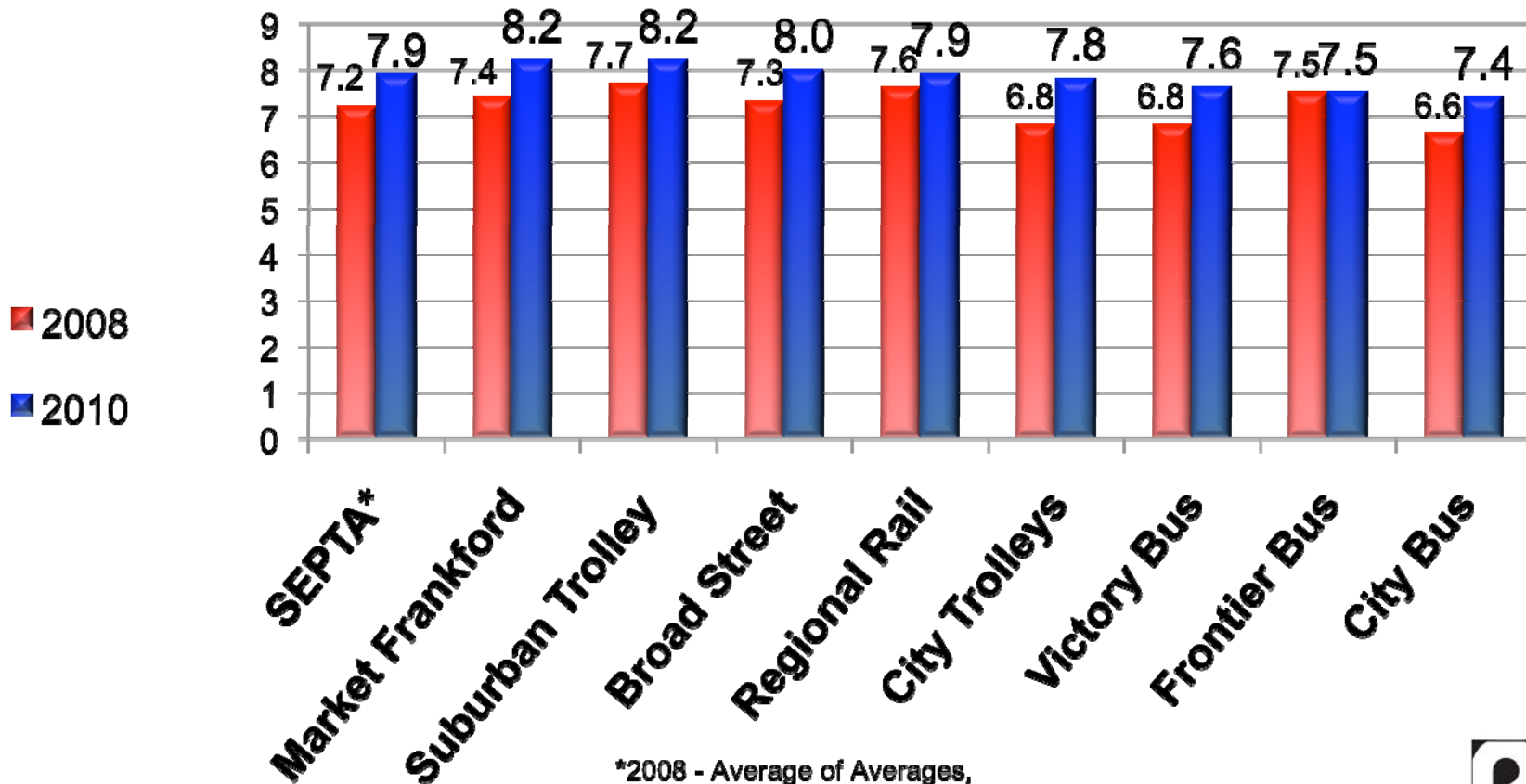
Modes Overview



Comparison to 2008	SEPTA Overall and all modes experienced higher or similar satisfaction ratings
Greatest Rating Increase	City Trolleys
Smallest Rating Increase	Regional Rail
Highest Rating	- Suburban Trolley - Market Frankford Line
Lowest Rating	City Bus



Overall Mode Averages

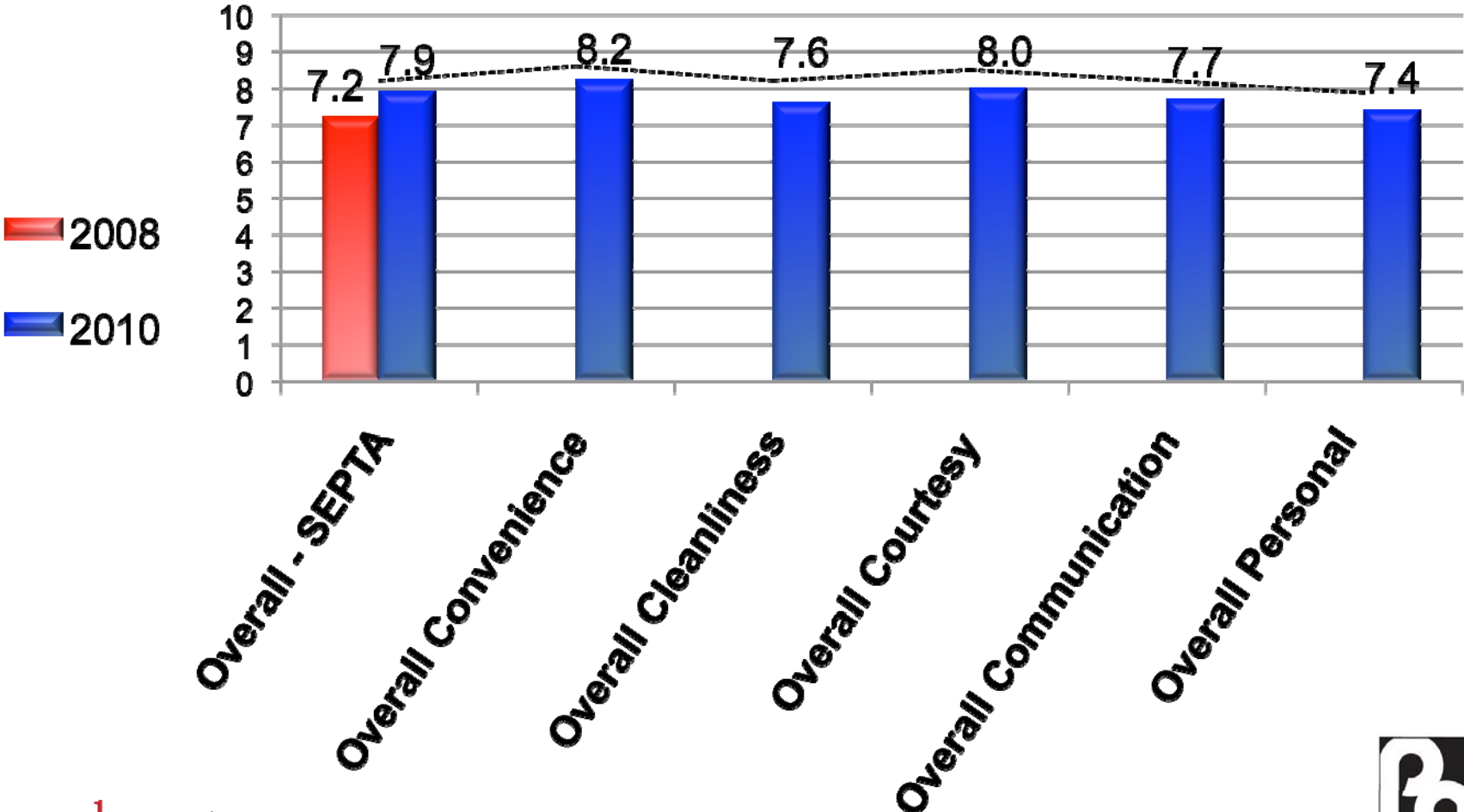


■ 2008
■ 2010

*2008 - Average of Averages,
2010 - Average of Ratings



SEPTA Overall Service Categories



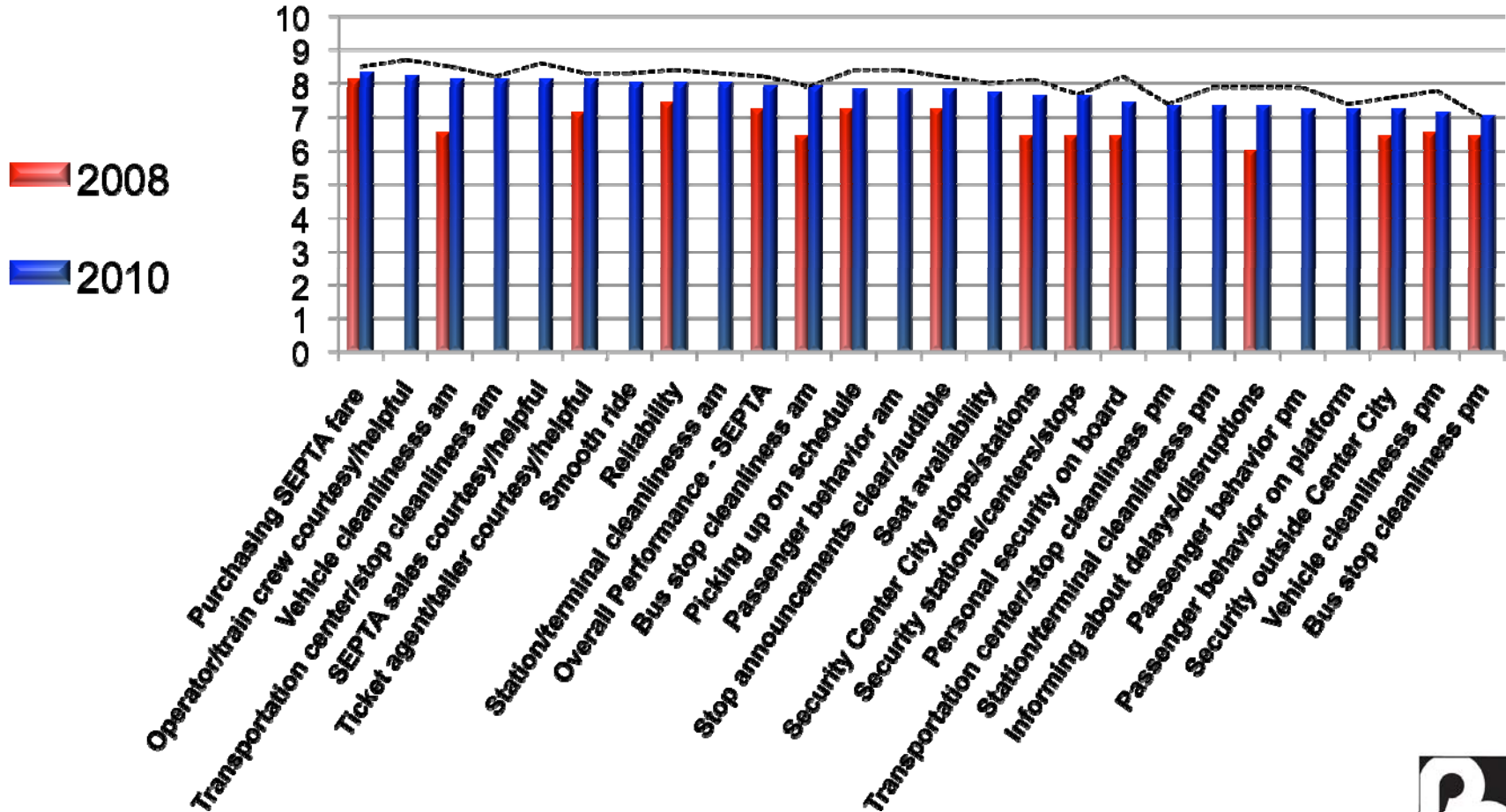
SEPTA Overall Service Components



Comparison to 2008	All comparable components received increased ratings
Greatest Rating Increase	Vehicle cleanliness am
Smallest Rating Increase	Purchasing SEPTA fares
Highest Rating	Purchasing SEPTA fares
Lowest Rating	Bus stop cleanliness pm
Highest Score of All Modes	Operator/train crew courtesy/helpfulness
Biggest Gap from Highest Score	- Vehicle cleanliness pm - Passenger behavior pm



SEPTA Overall



SEPTA Overall Priorities

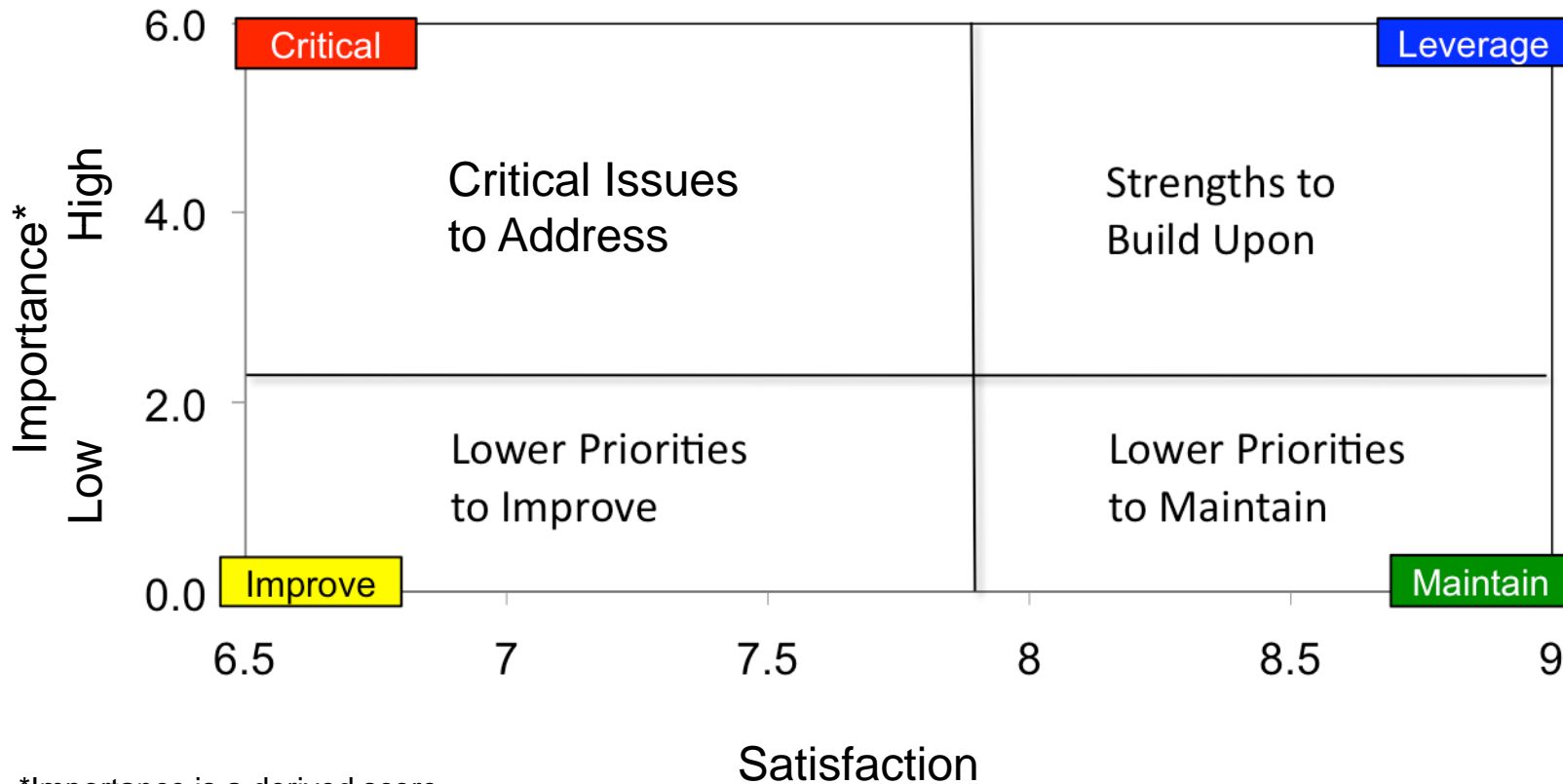


High Importance Customer Service Category	- Convenience
Critical Components in Need of Attention	<ul style="list-style-type: none"> - PM Vehicle Cleanliness - PM Passenger Behavior - AM Passenger Behavior - Informing about Delays/Disruptions - Clarity of Stop Announcements
Strengths to Leverage	<ul style="list-style-type: none"> - Reliability - AM Vehicle Cleanliness

Improvement Priorities Chart for Personal Security is not included in SEPTA Overall because only one common question was asked across all modes.



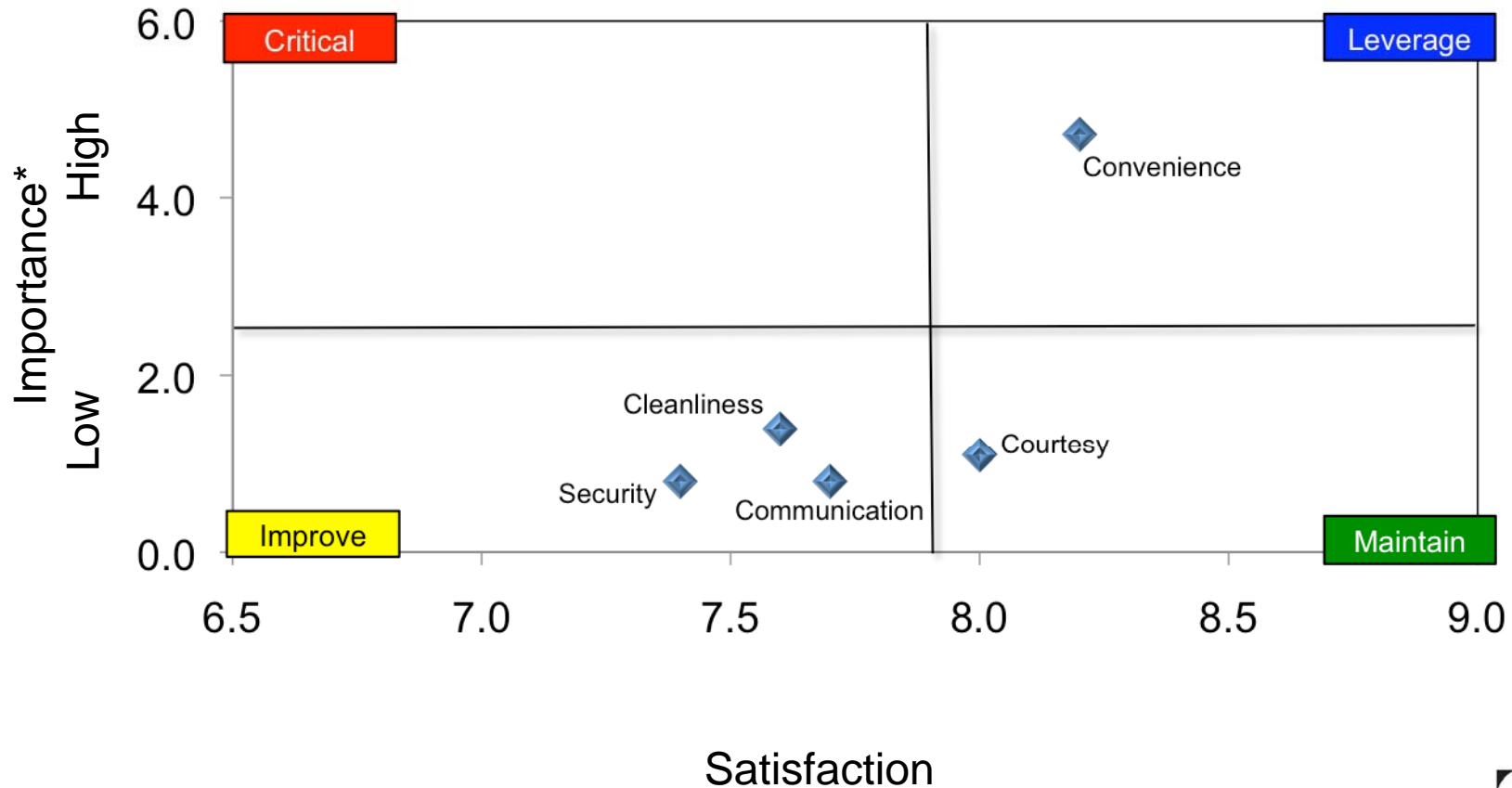
Improvement Priorities Chart Explanation



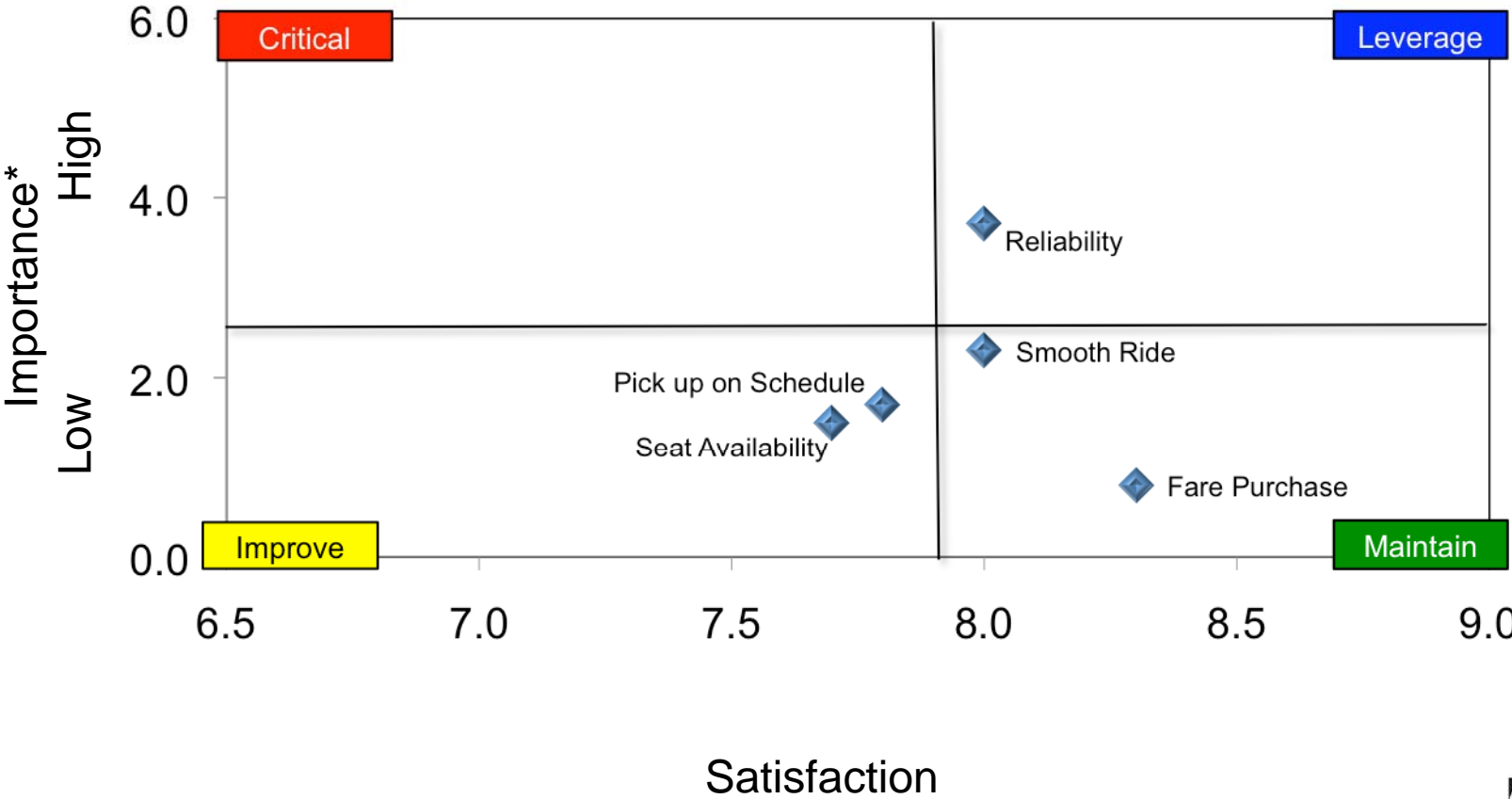
*Importance is a derived score



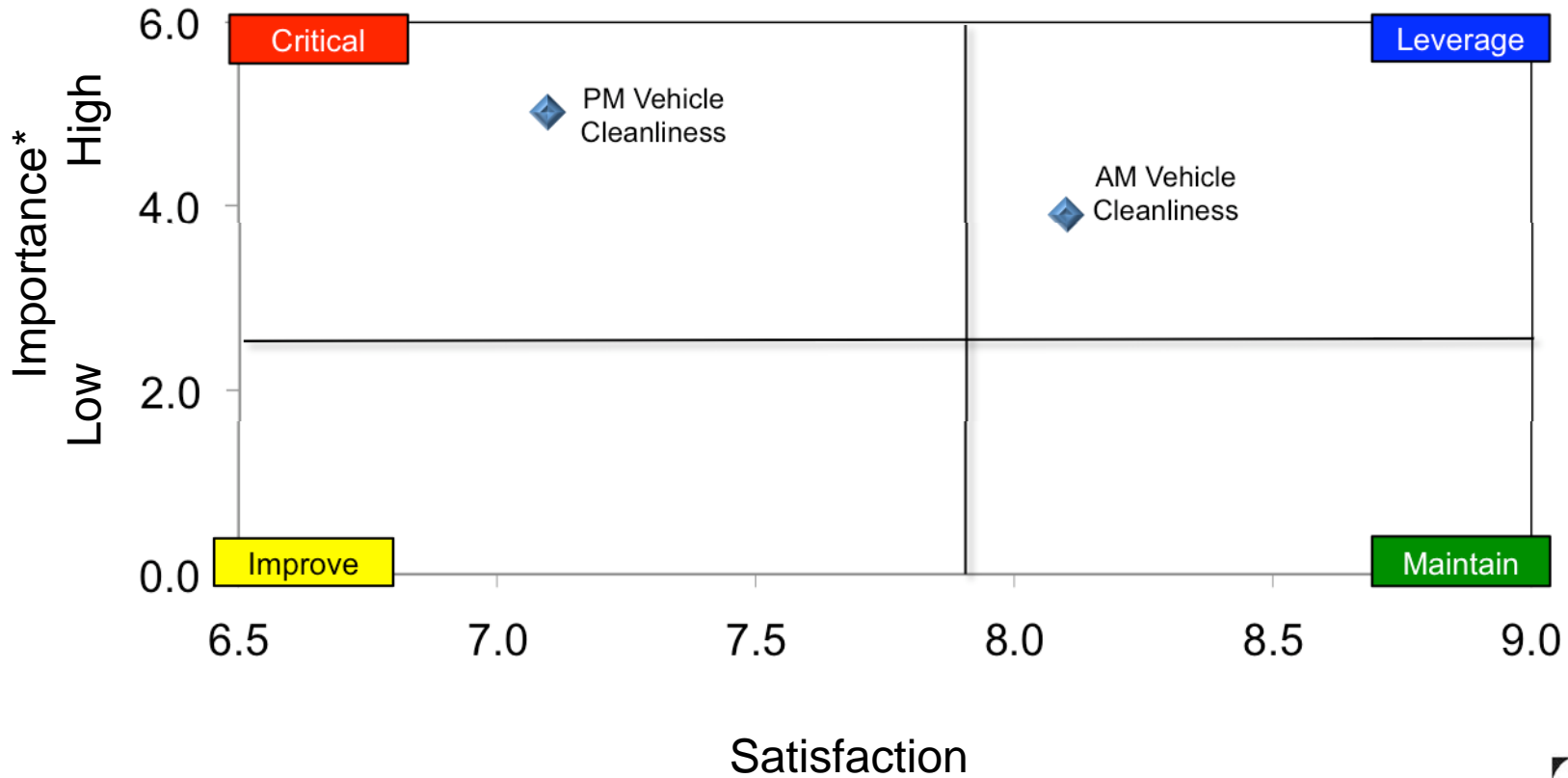
Improvement Priorities SEPTA Overall



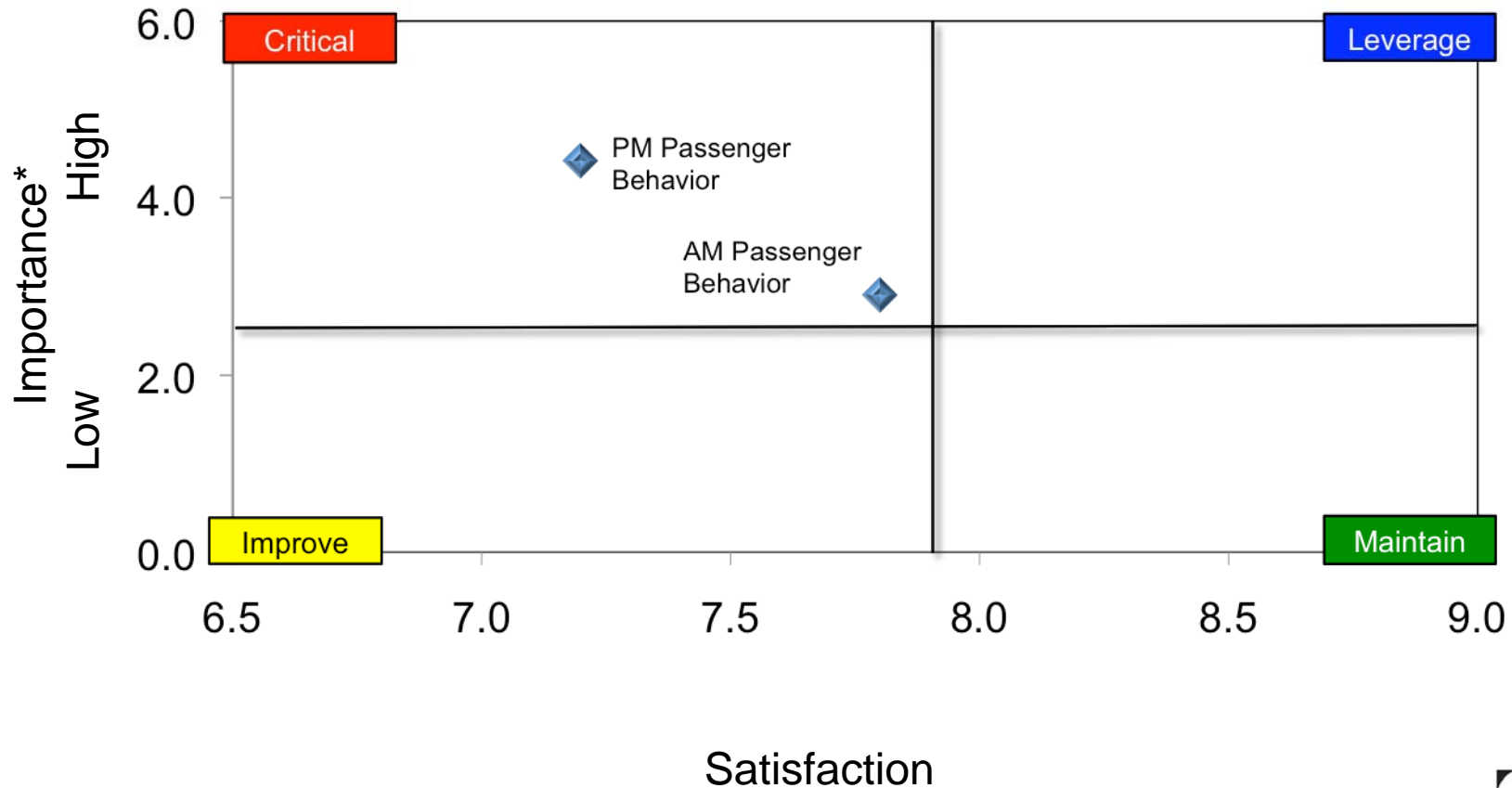
Convenience Priorities SEPTA Overall



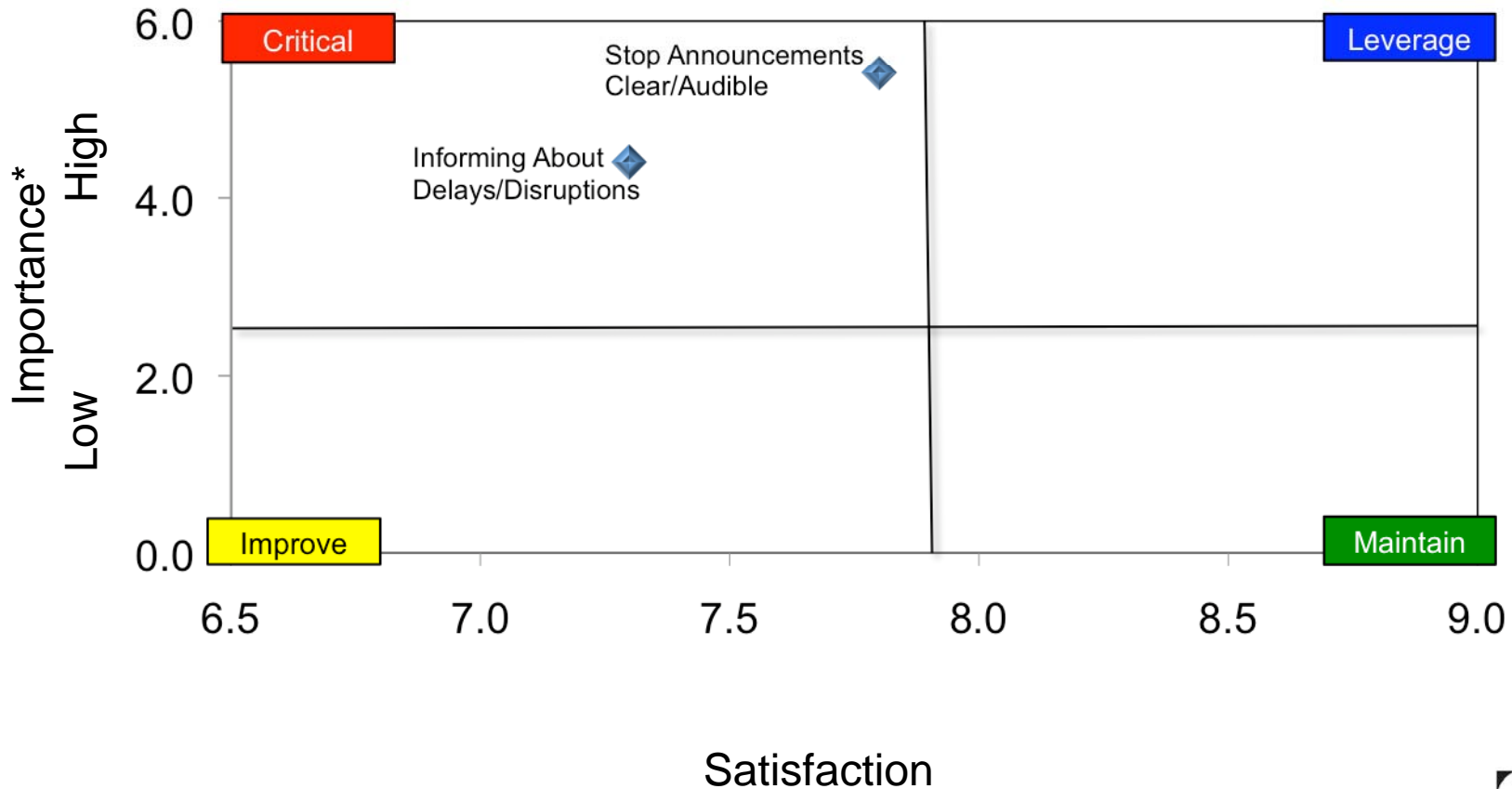
Cleanliness Priorities SEPTA Overall



Courtesy Priorities SEPTA Overall



Communication Priorities SEPTA Overall



Data Table – SEPTA Overall



	Imp	'08	'10	Top	Gap
Overall - SEPTA		7.2	7.9	8.2	0.3
Overall Convenience	4.7		8.2	8.6	0.4
- Picking up on schedule	1.7	7.2	7.8	8.4	0.6
- Reliability	3.7	7.4	8.0	8.4	0.4
- Purchasing SEPTA fare	0.8	8.1	8.3	8.5	0.2
- Seat availability	1.5		7.7	8	0.3
- Smooth ride	2.3		8.0	8.3	0.3

	Imp.	'08	'10	Top	Gap
Overall Cleanliness	1.4		7.6	8.2	0.6
- Vehicle pm	5.0	6.5	7.1	7.8	0.7
- Vehicle am	3.9	6.5	8.1	8.5	0.4
- Station/terminal am			8.0	8.3	0.3
- Station/terminal pm			7.3	7.9	0.6
- Bust stop pm		6.4	7.0	7.0	0.0
- Bust stop am		6.4	7.9	7.9	0.0
- Transportation center/stop am			8.1	8.2	0.1
- Transportation center/stop pm			7.3	7.4	0.1

Imp. - Importance

Gap - Best mode minus this mode

Importance column includes only attributes asked of all modes

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Data Table – SEPTA Overall



	Imp.	'08	'10	Top	Gap
Overall Courtesy	1.1		8.0	8.5	0.5
- SEPTA sales			8.1	8.6	0.5
- Ticket agent/teller		7.1	8.1	8.3	0.2
- Operator/train crew			8.2	8.7	0.5
- Passenger behavior am	2.9		7.8	8.4	0.6
- Passenger behavior pm	4.4		7.2	7.9	0.7
- Passengers on platform			7.2	7.4	0.2

	Imp	'08	'10	Top	Gap
Overall Communication	0.8		7.7	8.2	0.5
- Inform delays/disruptions	4.4	6.0	7.3	7.9	0.6
- Stop announce clear	5.4	7.2	7.8	8.2	0.4
Overall Personal Security	0.8		7.4	7.9	0.5
- Center City stops		6.4	7.6	8.1	0.5
- Outside of CC		6.4	7.2	7.6	0.4
- Stations/centers/stops		6.4	7.6	7.7	0.1
- On board		6.4	7.4	8.2	0.8

Imp. - Importance

Gap - Best mode minus this mode

Importance column includes only attributes asked of all modes

2/24/11

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