

# ETSAB: The Edmonton Transit User Experience

## Improvements to Consider for Implementation

### **Recommendation:**

That Community and Public Services Committee recommend to City Council:

1. Create a Code of Conduct for riders and transit operators outlining expectations and responsibilities, in consultation with transit users;
2. Develop a formal ETS statement of principles of commitments to the public;
3. Develop a comprehensive reporting mechanism which provides the public with daily, weekly, and monthly feedback against metrics based upon industry best practices and metrics of key concern to user's daily experiences with the system, including a clear response mechanism for 311 complaints to be resolved; and, develop and employ consistent reporting programs and mechanisms which specifically identify quality of customer service, on a regular basis;
4. Assign specific managers responsible for the overall function, operation, and cleanliness of transit facilities/groups of facilities, and publicize this;
5. Work to expand the inclusion of ETS fare with tickets to major sporting events and other special events;
6. Actively engage with other mobility providers such as bike share, ride for hire services, and others, which could complement transit use and make a user's entire journey more convenient and accessible;
7. Review and update the approach to Public Consultation to ensure that programs and projects are proactive to public needs and requests, represent the demography and geography of Edmonton, and utilize proven best practices in municipal Public consultation;
8. Ensure that transit operators and other public-facing personnel receive regular updated training and qualification in customer service, dealing with individuals with mobility issues and vulnerable persons, and other useful information to assist passengers.

### Report Summary

The Edmonton Transit System Advisory Board has compared key elements that affect the transit customer experience in cities similar to Edmonton. Based on this analysis, the Board believes there is value in the City of Edmonton exploring the possibility of implementing improvements as recommended on Edmonton Transit System.

### Report

Major transit systems are increasingly becoming aware that a comprehensive understanding of their customer's experience with the system is crucial to meaningful approaches for investments, to attract and retain riders, and to entice the choice rider to the system. From a functional perspective, understanding what matters most to the transit user helps a city and its transit system triage and target spending, maintenance, and upgrades where they will have the greatest impact on one's experience, and therefore on the rider's likelihood of using transit. Similarly, operating a system which is responsive to customer feedback and which respects the user builds goodwill for the system, which is important for promoting and expanding ridership as well.

A detailed list of desired improvements to the user experience in Edmonton could fill volumes. The Transit Strategy currently under development and set for completion by spring 2017 should address items which relate to the configuration and operation of the overall transit network. As well, the electronic fare project which is underway may address one aspect of ease of use of the transit system. ETSAB's objectives with this report are to:

1. Identify the elements by which a transit system is judged by its users, and how the users experience a system;
2. Determine how the transit users' experiences and feedback are incorporated into the system;
3. Present examples of effective programs and practices from other transit systems which could be implemented in Edmonton.

### Policy

Conduct of Transit Passengers Bylaw 8353

### Justification of Recommendation

1. Create a Code of Conduct for riders and transit operators outlining expectations and responsibilities, in consultation with transit users – Refer to Section D
2. Develop a formal ETS statement of principles of commitments to the public – Refer to Section C
3. Develop a comprehensive reporting mechanism which provides the public with daily, weekly, and monthly feedback against metrics based upon industry best practices and metrics of key concern to user's daily experiences with the system, including a clear response mechanism for 311 complaints to be resolved; and, develop and employ consistent reporting programs and mechanisms which specifically identify quality of customer service, on a regular basis – Refer to Section C
4. Assign specific managers responsible for the overall function, operation, and cleanliness of transit facilities/groups of facilities, and publicize this – Refer to Section C
5. Work to expand the inclusion of ETS fare with tickets to major sporting events and other special events – Refer to Section E, item 3
6. Actively engage with other mobility providers such as bike share, ride for hire services, and others, which could complement transit use and make a user's entire journey more convenient and accessible - Refer to Section E, item 4 & 5
7. Review and update the approach to Public Consultation to ensure that programs and projects are proactive to public needs and requests, represent the demography and geography of Edmonton, and utilize proven best practices in municipal Public consultation – Refer to Section H
8. Ensure that transit operators and other public-facing personnel receive regular updated training and qualification in customer service, dealing with individuals with mobility issues and vulnerable persons, and other useful information to assist passengers – Refer to Section J

### Attachment

1. ETSAB: The Edmonton Transit User Experience

### Table of Contents

A. Introduction	
Objectives of this Report.....	2
What is the “User Experience”? .....	2
Maturing from a System to a <i>Service</i> .....	4
B. Tracking the User Experience: ETS	
311 Data.....	6
Customer Satisfaction Surveys .....	7
C. Tracking the User Experience: What Other Cities Do	
1. The Station Manager .....	7
2. Rider Evaluators .....	8
3. Customer Service Reporting.....	9
D. Communicating to Improve the User Experience	
1. Codes of Conduct.....	10
E. Transit and Private Sector Partnerships	11
1. Partnerships with Hotel Industry in Edmonton.....	11
2. Partnership with Major Employers in Edmonton.....	12
3. Transit Ticket for Special Events and City Attractions .....	12
4. Partnerships with other Mobility Providers .....	13
5. Partnering with Ridesourcing Apps and Providers .....	14
F. Real-Time Social Media Communication	
G. Use of Contactless and Mobile Payment Systems	
H. Public Consultation	
I. Public Safety	
J. Role of Transit Operators in User Experience Delivery	
1. Role of Transit Operators.....	17
2. Best Practices in Transit Operator Training and Conduct .....	19
APPENDIX 1 - Operator Selection - American Public Transit Association	
APPENDIX 2 - Codes of Conduct	

### A. Introduction

Major transit systems are increasingly becoming aware that a comprehensive understanding of their customer's experience with the system is crucial to meaningful approaches for investments, to attract and retain riders, and to entice the choice rider to the system. From a functional perspective, understanding what matters most to the transit user helps a city and its transit system triage and target spending, maintenance, and upgrades where they will have the greatest impact on one's experience, and therefore on the rider's likelihood of using transit. Similarly, operating a system which is responsive to customer feedback and which respects the user builds goodwill for the system, which is important for promoting and expanding ridership as well.

### Objectives of this Report

A detailed list of desired improvements to the user experience in Edmonton could fill volumes. The Transit Strategy currently under development and set for completion by spring 2017 should address items which relate to the configuration and operation of the overall transit network. As well, the electronic fare project which is underway may address one aspect of ease of use of the transit system.

ETSAB's objectives with this report are to:

1. Identify the elements by which a transit system is judged by its users, and how the users experience a system;
2. Determine how the transit users' experiences and feedback are incorporated into the system;
3. Present examples of effective programs and practices from other transit systems which could be implemented in Edmonton.

### What is the "User Experience"?

The "user experience" is not defined in one standard way within the transit industry, and is indeed a subjective approach to evaluating the human side of transit. It is increasingly becoming one of the priorities for high-functioning transit systems globally, with a rapid evolution in application and approach in North America as transit becomes increasingly important to growing urban centres. Part of the importance of understanding the constitution of the user's experience is a transit agency's attempt to capture the choice rider; however, it is also recognized that the entire rider base should be considered- a transit agency should not only pursue gimmicks to attract non-riders, but serve all users at a high standard. This is part of the fundamental change in transit systems becoming *services*, rather than simply *systems*.

How to define “user experience”? The approach seems to differ depending on your perspective. The elements that users tend to identify as most important are not necessarily the same as what transit systems identify.

In our research, the most common user-side elements which define a good, well-performing transit system are that it is:

- Easy and convenient to use
- Fast
- Safe
- Clean
- Affordable

These are paralleled by other specific factors:

- The primary factor is Frequency and Path of service (frequent, fast, direct to destinations);
- Codes of Conduct which describe appropriate passenger behaviour;
- Passenger Safety on the system, at stations, and travelling to stops/stations;
- High quality of human-scale infrastructure: the pedestrian realm, sidewalks, amenities, a high degree of protection for pedestrians from vehicles and weather; crosswalks, and bus stop amenities;
- Fare media: it is easy to purchase tickets/cards everywhere and anywhere; electronic payment is accepted.

Recognizing these, transit systems have begun adopting customer charters and commitments to mandate the service they provide.

Calgary Transit’s commitments are:

- Safe: We’ll plan, design and operate a safe transit system.
- Reliable: We’ll provide a dependable transit service by minimizing delays and being on time.
- Helpful: We’ll provide a service that is friendly and helpful.
- Informative: We’ll provide customers with accurate, consistent and timely information.
- Easy to use: We’ll make it easy to get around on Calgary Transit.
- Clean: We’ll keep our vehicles, stops and stations clean.

The Toronto Transit Commission (TTC) introduced a Customer Charter in 2015, with the pillars:

- Accessible
- Clean
- Informative
- Modern

- Renewal
- Responsive

### Maturing from a System to a *Service*

Creating a system that focuses on the rider’s experience shifts how we deliver transit to users as a city. Edmonton’s transit system is one to be proud of- however there is always room to improve. As a result, ETSAB has looked into why it is important to work on the “service” aspect of transit.

The day to day operations are a strong component of what matters to riders. A passenger does not know the background of everything that goes into making a transit system successful. They *do* notice when their bus is late, if the signage is wrong, or if there is a foul smell in the station. We believe that there are ‘quick wins’ that can be implemented to help transform Edmonton Transit System into a true *service*.

The graph below from the *International Journal of Quality Innovation* outlines what transit riders are looking for. When people know what to expect and when to expect it, they can consistently rely on ETS to get them where they need to be safely and on time. These are important factors in a person’s consideration of which mode of transportation to use.

#### Demand side effects and their equivalence on the supply side

	Dimensions of user perceptions	Operator specified measures
<b>Getting to the bus Stop quality</b>	ease, safe, time (distance), knowing where the bus stop is	frequency, availability of bus shelter and seats
<b>Wait quality</b>	wait time at stop, punctuality of bus	frequency
	wait comfort, wait safety	availability of bus shelter and seats
<b>Trip quality</b>	time to board a bus	frequency, % of low floor buses
	time to get a seat	number of seats available
	moving to your seat	average speed, network shape

	travel time	travel time
	trip cost	fare
<b>Vehicle quality</b>	cleanliness	hours of vehicle cleaning/vehicle
	comfort of seats (types), spaciousness	percent of buses with cloth seats
	temperature control (ventilation)	percent of buses with air conditioning
	noise	visual surveillance
	safety	average age of the fleet
	modernity	wheelchair access (yes/no)
	ease of use for those with disabilities	
<b>Driver quality</b>	appearance-helpfulness	years of driving experience
		money spent on driver training
<b>Information quality</b>	pre-trip information	availability of timetable/destination signs

Found at <https://jqualityinnovation.springeropen.com/articles/10.1186/s40887-015-0003-9>

Creating a “Service” is a mindset of the industry. So far Edmonton has done a decent job of moving people from point A to B. However, as the city moves forward we need to consider how Edmonton’s transit system will evolve. Edmonton should begin taking into consideration what will create a positive experience for a rider from the moment they leave their starting point until

the time they arrive at their destination. This will ensure that public transit remains a competitive mode of transportation, and likewise sustains a competitive city.<sup>1</sup>

## B. Tracking the User Experience: ETS

### 311 Data

Currently ETS keeps comprehensive data on 311 issues. It is summarized in the ETS Customer Feedback Analysis Year-End Report. When ETS responds to these 311 issues, this is inherently a reactive approach. However, when taken as a whole, it gives an excellent overview on where efforts could be targeted to ensure a proactive response to designing and delivering a high-quality user-experience.

There are two main ways to submit a customer issue to ETS. The first is to dial 311 and go through a mixture of automated prompts and human interaction. The second is online through the 311 online portal, there you can type the issues and submit it. Both processes will give you a ticket number where you can follow-up with the status of your issue. Edmonton's 311 phone service is very similar to other cities 311 service; ease of use is about the same. Online, submitting a 311 issue takes 3 clicks from the ETS website. Once again compared to other cities, this is either the same or better for ease of finding the prompts to get to the 311 page.

In 2015, 1.1 million tickets generated by 311 inquiries were transit related. 22,784 of them were forwarded to ETS- and 90% of those are complaints. 6,306 of those complaints required a response to the complainant. Just over half- 53%- were Operator-related complaints, followed by Bus Facilities, Fleet, and then Security. Of those Operator complaints, 62% were related to missed-zone boarding, meaning the bus was too full and the bus driver didn't stop for the people waiting for their bus.

*There is no data stating if there were corrective actions issued to address these complaints.*

A note about the low number of fleet and security 311 tickets- currently, ETS recommends calling a separate number called "Transit Watch" for security concerns. Therefore, the low number of tickets related to security does not indicate that it isn't an issue for the transit system.

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<sup>1</sup> References

London, U.K.

<http://www.thedrum.com/news/2016/06/09/transport-london-teams-twitter-launch-instant-tube-alerts-service>  
CityLab

<http://www.citylab.com/commute/2013/01/what-really-matters-increasing-transit-ridership/4275/>

Human Transit

<http://humantransit.org/2015/07/mega-explainer-the-ridership-recipe.html>

When looking at a year-over-year lens, bus facilities received the greatest increase of complaints, at 32%. 74% of 311 tickets are resolved within 7 days. There was no data on what constitutes resolved, since as stated before, there is no data provided on if a corrective action was taken.

A reasonable conclusion that can be drawn from the data is that missed-zone boarding is the largest generator of transit complaints. This is most likely due to full busses not able to make their stops. This issue will hopefully be dealt with through the forthcoming Transit Strategy and action on “The Way We Move: Transportation Master Plan”. However, taking one example of a customer complaint:

*“The bus driver drove by the bus stop without letting anyone board the bus. There was room on the bus. He tried to get the attention of the bus driver. She ignored and said no and drove on.” Issue ID: 232725*

It would seem the passenger is more upset with the fact that the bus driver didn’t attempt to put more people on, or at least stop and communicate with the user that they cannot fit any more people on the bus.

## Customer Satisfaction Surveys

ETS also runs a customer satisfaction survey every quarter where they actively canvass riders at Transit Centres. Detailed and extensive data is obtained from those surveys. The surveys back up the data from 311 calls, the most prominent concern of which is over-crowded buses.

## C. Tracking the User Experience: What Other Cities Do

Several methods employed by other transit systems have caught our attention as high profile and effective strategies.

### 1. The Station Manager

As part of a change in leadership and overhaul of the management of the Toronto Transit system, one of the first initiatives undertaken in 2013 was the Group Station Manager program. The Group Station Manager program assigns a manager for a set of 4-6 stations in the subway network. The manager is identified by signs in the stations with their name, picture, and direct contact information to their office. This provides a visible ownership and responsible presence for the functioning, cleanliness, and safety of the station.



## 2. Rider Evaluators

Beginning in 2013, the Société de transport de Montréal (STM) has used 'mystery shoppers' on a regular basis to evaluate service quality. These 'mystery shoppers' provide qualitative feedback for regular reports on items such as the service provided by operators and the ease of obtaining and using information on the transit system.

### 3. Customer Service Reporting

A daily Customer Service Report is published by the TTC with specific performance measures, including service reliability, and elevator and escalator status:

**Customer Service**

Five-Year Corporate Plan 2013-2017

Customer Charter

Meet the Managers

Complaints, compliments, and suggestions

**Daily Customer Service Report**

Customer Satisfaction Survey Results

Customer Liaison Panel

Customer Communications Process

AC on Line 2 Subway Cars

TTC Customer Town Hall

Transit Talk - By TTCriders

Video Cast

Cellular Service

Wi-Fi In Our Stations

Customer Information Initiatives

Investing in service

## Daily Customer Service Report

Check out our score card

Welcome to the Daily Customer Service Report, the score card with the latest information about our performance. This score card is one of many initiatives underway to increase accountability and transparency at the TTC about how well we are serving our customers.

This daily report shows at a glance how we did on the previous business day to meet our commitment to provide punctual subway/RT, bus and streetcar service as well as reliable up-time availability of elevator and escalator service in subway stations.

Report for Thursday, September 1, 2016

Service:	Our objective:	Our target:	Actual:	How we did:
Yonge-University -Spadina Subway	Deliver a punctual service <sup>1</sup>	96%	96%	✓
Bloor-Danforth Subway	Deliver a punctual service <sup>1</sup>	97%	96%	✗
Sheppard Subway	Deliver a punctual service <sup>1</sup>	98%	98%	✓
Scarborough RT	Deliver a punctual service <sup>1</sup>	96%	95%	✗
Bus	Deliver a reliable headway <sup>3</sup>	65%	N/A	N/A
Streetcar	Deliver a reliable headway <sup>3</sup>	70%	57%	✗
Elevator	Provide easy access <sup>2</sup>	98%	100%	✓
Escalator	Provide easy access <sup>2</sup>	97%	98%	✓

**Legend**

<sup>1</sup> % of Service (up to Headway + 3 minutes)

<sup>2</sup> % of devices available

<sup>3</sup> % of service (+/- 3 minutes)

From: [https://www.ttc.ca/Customer\\_Service/Daily\\_Customer\\_Service\\_Report/index.jsp](https://www.ttc.ca/Customer_Service/Daily_Customer_Service_Report/index.jsp)

Monthly and quarterly reports are generated and published based on these daily reports.

## **D. Communicating to Improve the User Experience**

### **1. Codes of Conduct**

Important to a good user experience is the removal of the unknown. Knowing what is expected from you, and what to expect of other Users and the transit Operators, increases one's comfort and confidence levels.

A web search for 'User Codes of Conduct' produced cookie cutter documents throughout the North American transit industry, none varying far from our own<sup>2</sup>. User expectations for the Edmonton Transit System (ETS) are spelled out in Bylaw 8353<sup>3</sup>, "Conduct of Transit Passengers", passed by Council in 1987 and last amended in 2011. Though updated in some areas this document makes no mention of accessibility, ramps, or priority seating.

Bylaw 8353 is virtually unknown to transit users. A search of the Edmonton.ca web site found that other than the bylaw itself, Bylaw 8353 is only referenced in the Disabled Adult Transit System (DATS) Code of Conduct<sup>4</sup>. No link can be found under regular transit. Bylaw 8353 is also referenced in the (very) small print on ETS tickets (see Appendix 2). This may reduce the effect of programs such as the ETS Etiquette program 'Thanks', where users are thanked for doing something they were not aware they were supposed to be doing.

No code of conduct exists for Operators.

The DATS Code of Conduct is an exception to the rule setting out conduct for both Users and Operators specific to DATS. The code builds on Bylaw 8353 and covers a comprehensive list of thirty-two (32) areas of conduct.

ETSAB recommends the following:

- Create a "Code of Conduct" for ETS Users, based upon the one used in DATS;

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<sup>2</sup> <http://winnipegtransit.com/en/rider-guide/public-transit-by-law-and-code-of-conduct>  
<http://www.metrotransit.org/code-of-conduct>

<sup>3</sup> [http://www.edmonton.ca/bylaws\\_licences/PDF/C8353.pdf](http://www.edmonton.ca/bylaws_licences/PDF/C8353.pdf)

<sup>4</sup> <http://www.edmonton.ca/ets/dats/dats-code-of-conduct.aspx>  
<http://www.edmonton.ca/transportation/PDF/DATS%20Code%20of%20Conduct%20and%20Expectations%20Brochure%202016.pdf>

- Create a “Code of Conduct” for ETS Operators that must be signed as part of their terms of employment;
- Post both the User and Operator “Codes of Conduct” on buses, trains, and in Transit Centers;
- Preface each code with the phrase ‘I Will’ to personalize and create ownership of the codes.

For example:

- I will respect my fellow passengers
  - I will keep my music to myself
  - I will occupy only one seat
- Regular review and update of Bylaw 8353 to reflect the current Transit system.

## E. Transit and Private Sector Partnerships

Transit partnership objectives are to facilitate, promote, and integrate sustainable public transportation solutions that encourage Edmonton’s economic development, improve citizens’ quality of life, and increase connections among communities. Providing good access to transit is a critical component of assessing services to employment, health, education, wellness and recreation activities. It also serves employment and promotes social inclusion by allowing people to stay connected to communities. Edmonton Transit System should continue developing strategies to support coordinated transit opportunities throughout Edmonton by working in partnership with community stakeholders, industry, and local businesses on a number of important initiatives.

### 1. Partnerships with Hotel Industry in Edmonton

Edmonton Transit System (ETS) can look for partnerships with local business entities which include hotels, hostels, and local business to promote and provide transit services to visitors to Edmonton.

One such example is Geneva, Switzerland. On arrival at Geneva airport you can obtain a free transit ticket from the automatic vending machine for travel in Geneva. It is valid for 80 minutes and is available only to arriving passengers holding a valid flight ticket.

In Geneva, when you stay in a hotel, a youth hostel, or a campsite in the region, you will receive a "Geneva Transport Card" free of charge. With this card, public transport in Geneva is free for the full duration of your stay. This personal and non-transferable card will be given to you when you arrive at your accommodation. It permits unlimited travel on Geneva's public transport network that includes bus, train, and boat.

## **2. Partnership with Major Employers in Edmonton**

The ETS@WORK program provides the opportunity for employees to have their transit passes automatically paid and provided via their employer, at a reduced rate. We recommend expanding outreach and advertising efforts to increase employer/employee participation, especially among private employers. This is similar to the U-Pass program.

The U-Pass is a mandatory service offered by the post-secondary institutions in Edmonton. It provides students with discounted transportation during the school year. ETS has partnered with various post-secondary institutions in Edmonton. The Universal Transit Pass (U-Pass) provides eligible students with unlimited and affordable access to regular Edmonton transit services on a term-by-term basis. The success of the program relies on a bulk purchase so that students pay per month which is a significant discount in comparison to the retail price for a typical transit pass. The U-Pass can be claimed as a tax credit under the Federal Transit Tax credit.

The ETS@WORK program is available for the employees of major public and private employers in Edmonton including the City of Edmonton, Government of Alberta, University of Alberta, NAIT, MacEwan University, and Alberta Health Services. The program is intended to promote transit adoption and ridership.

## **3. Transit Ticket for Special Events and City Attractions**

Special events present a challenge for service providers in that they may be non-recurring events without a consistent transit demand; or, in the case of sporting events, produce major swells in ridership at very specific times. It is vital that transit agencies must work cooperatively with other stakeholders, and provide supplemental service in addition to normal transit services. Special events are big attractors of non-regular riders, presenting a unique opportunity to market the transit agency's services to the community.

Currently, Edmonton Eskimos football game tickets act as a transit ticket for a period before and after the football game. From the user's perspective, this is a convenient arrangement, which also alleviates Transit from policing fare payment at Commonwealth LRT Station/Park-and-Ride bus lot. This arrangement exists with other select special event hosts.

ETS should work towards obtaining similar arrangements with more special event hosts and venues. This will not only promote transit ridership but will also mitigate parking, traffic and other related issues. The same approach can be applied for many other City attractions and venues.

### 4. Partnerships with other Mobility Providers

In recent years transportation planning has become more mixed modal and comprehensive, considering a wider range of options and impacts. Currently, there are numerous opportunities in which the manufacturing sector can engage in public transportation and transportation improvement programs.

One such example is of 'Tern', manufacturers of folding bicycles. Tern recently collaborated with Hamburg's transit authority to encourage greater use of portable bicycles with the city's transit network. The goal of the program is to encourage transit use by allowing portable bicycles on public transit network, including trains, subways, buses, and ferries. Within just the past year, Tern partnered with transit authorities in Munich, Stuttgart, and Italy's national railway operator to offer similar programs.

Mixed modal transport is the best way to leverage existing public transport systems and instead of investing into building a network that reaches everywhere, cities can promote the use of bikes, which can bridge the gap between the user's home and the nearest bus/train station. A person can easily take a portable bike on public transport and use it when they get off to ride to their final destination.



## **5. Partnering with Ridesourcing Apps and Providers**

When ride-hailing apps like Uber and Lyft burst onto the scene, they were talking about disrupting the decades-old mobility networks that preceded them. Instead of competing for the same riders, public transit and ridesourcing complement one another by serving different trip types. Public transit agencies including ETS should view new forms of shared mobility as complementary to existing systems.

According to the American Public Transportation Association, companies like Lyft and Uber are integral to creating a dynamic multimodal lifestyle. Some cities have gone further with outright partnerships with these upstart service providers. Atlanta, Dallas, St. Petersburg, and Florida are experimenting with ways to encourage customers to use ride apps to get to and from transit stations. This part of the journey is often referred to as the “Last-mile problem”.

## **F. Real-Time Social Media Communication**

A prime example is from London where Transport for London (TfL) has teamed up with Twitter to deliver real time updates on the service.

*“The pilot means that customers will be automatically alerted of severe delays on major London Underground and TfL rail services as soon as they occur, with the aim of avoiding disruption.”*

This helps riders know if they need to make alternate plans and can also be used as a two-way communication platform.

*“The partnership marks the first time the social network has partnered with a transport authority to give travellers line updates.”*

This is a positive example of strong communication and a useful partnership that can be made with public transit to improve the rider's experience.

The aim of all these suggestions is to move towards creating a seamless experience for visitors and local residents.

## **G. Use of Contactless and Mobile Payment Systems**

There is great potential in contactless and mobile payments to make urban transit systems work more efficiently and user friendly.

There are many examples around the world. Currently MasterCard is working with transit authorities from Philadelphia, USA to Gujarat, India to integrate credit card payment options. According to MasterCard's analysis and research, transit is one of the largest cash dominated markets, which amounts to approximately \$200 billion dollars per year around the world.

This monetary scale should encourage financial institutions, major credit card companies and transit authorities to explore further avenues of partnerships and ventures.

For example, MasterCard has partnered with Cubic Transportation Systems, which is a leading integrator of payment and intelligent travel solutions worldwide. MasterCard and Cubic Transportation Systems are working on a contactless smart card payment solution for public transit. Mobile ticketing for public transit has been in use in various cities around the globe for many years. Studies have shown that in cities where mobile ticketing has been deployed for transit, users' adoption levels have increased and in some cases over 50% of tickets are sold via the mobile app.

ETS can explore technology solutions that make city transport smarter by simplifying ticketing, validation and management for transport authorities and operators around the globe, enabling passengers to use what they have in their pocket to travel. Companies like Masabi are already providing such services to various transit agencies around the world.

## H. Public Consultation

The Edmonton Transit System is inherently susceptible to the needs of the public population whom uses it. With this in mind, it is only logical to consult with that group to understand what exactly those needs are. The City of Edmonton currently has a well-established public consultation program based on the IAP2 Public Consultation Framework, and actively seeks out public input on a multitude of issues. The intent of this report is not to analyze those operations, but rather, to identify additional opportunities for public input.

In order for ETS to stay with current transit trends, and endeavor to be an industry leader, continuous and real-time feedback is essential to efficient development as the system-based industry adopts more of a service-based mindset. It is evident that ETS agrees with this concept when considering the fact that this very board providing this report is itself a product of a public consultation initiative to solicit feedback from stakeholders.

One of the challenges with public consultation is effectively accessing as many members of a stakeholder group as possible. The above image shows the transition from a system mentality, to a partnership mentality. This partnership is the ultimate reality of a strategic

approach to public consultation, and a service based mindset is the first step in the path to public partnership in involvement and influence in Edmonton Transit.

If a form of on-site instant feedback only requiring a very short time to complete were available in high traffic areas, this could greatly increase the amount of feedback received. In essence the service provides the tool for the user to then complete the task. This is starting to pop up in other industries. It's becoming common to see a tablet in a fast-food restaurant asking a few short questions with yes or no answers in the area where you wait for your food. This same tactic could be employed at LRT platforms and large transit hubs. As people wait for the train or bus, if there is an electronic device there providing a mechanism to give feedback, there is a greater chance that a wider range of riders will provide valuable feedback that otherwise would not have been received. This would likely increase the amount of relevant, non-negative feedback, therefore increasing the quality of input.

## I. Public Safety

Public Safety, as it relates to public transit, is a frequent topic of interest to members of the public and the media. For that reason ETSAB feels the need to regularly review and discuss the issues and successes around public safety with our transit program.

In 2014 ETSAB produced a report on ETS Public Safety, which reviewed identified issues and suggested solutions. Some recommendations were implemented, and have given some ETS employees the awareness and skills to deal with sexual harassment related incidents. Additionally, other minor changes have been made to encourage incident reporting; such as removing the "misuse will result in a disciplinary fine" line from beside the "Help" button on the LRT. These have been positive steps in the right direction, and more can be done to change negative perceptions of safety and safety related programs.

It could be argued that the current *perception* of insecurity towards using ETS is one of the major issues negatively affecting ridership numbers. To ensure this perception matches reality, it is critical to communicate transit related crime statistics, referencing locations and types of incidents, to either disprove these insecurities or aid in transit public safety situational awareness.

As our transit system grows, so do the complexities around public safety. This increase in complexity creates an opportunity to engage frontline emergency services and City of Edmonton Emergency Management branches to incorporate public safety elements that would aid in the efficient delivery of these services (Police, Fire, and EMS). Currently this consultation is not taking place, resulting in design conflicts with the operations of frontline emergency services. When a fire alarm activates on a LRT platform no one understands his

or her responsibility or what he or she should do; if there is a need to evacuate, there is no safe way to do so. These issues, and more, can be addressed by the emergency planning professionals already employed by the city to increase the safety of Edmonton Transit System users.

## J. Role of Transit Operators in User Experience Delivery

In this section of the report, ETSAB sought to identify industry-recognized best practices with regard to how transit operators can provide great customer service. Given that no ETSAB members have undergone the significant training that ETS operators receive, we cannot comment on the extent to which customer service is emphasised and promoted amongst other priorities. Rather our intent is to provide some evidence-based information for ETS to consider when evaluating their recruitment and selection approach, training and re-training programs, operating protocols, codes of conduct, and recognition and disciplinary mechanisms.

### 1. Role of Transit Operators

As the customer-facing front line, transit operators play an integral role in ensuring passengers consistently receive a great customer service experience while riding with ETS. Customers rely on operators/drivers to provide route and schedule information, relay information about service delays or schedule disruptions, and accommodate reasonable requests where possible. Ultimately, ETS operators are the single biggest determinant in how passengers perceive our transit system from a customer experience point of view.

#### **ETS' Commitment to Customer Service and Current Satisfaction Levels**

ETS' Customer Service Model identifies that everyone in the organization has a responsibility to look after, listen to and provide high quality service to customers. ETS recognizes that customer service is essential to maintaining citizen support and the overall success of Edmonton Transit.

Given that the majority of ETS customer trips take place on the bus network, bus drivers play an especially important role in meeting ETS' commitment to delivering exceptional customer service. In 2015, ETS accommodated an annual ridership of approximately 88.7

million linked passenger trips (bus and LRT). Of the estimated 34.7 million annual LRT boardings, a majority of those trips either started or ended with a bus trip.

Based on the April 2016 ETS Customer Satisfaction Research report, the following statistics are relevant to consider:

- 12-month average overall satisfaction rates with ETS is 76%
- 44% are likely to recommend ETS, and only 14% are 'detractors'
- 86% feel transit operators are 'helpful and considerate'
- One of the top tier attributes was Operator's driving, attention to safety and customer service
- The key reasons for some of the lower satisfaction ratings were bus-related time factors (reliability, frequency and connections), overcrowding, and how ETS communicates.
- ETS concluded that although work remains to improve satisfaction in several key areas, results show commitment to ETS' mission statement.

In reviewing the key areas for improvement identified by ETS, most of these factors fall outside of operators' control, such as increasing bus frequency, improving reliability and on-time performance, improving connections, and improving value for fare.

To gain a better understanding of what the opportunities for improvement are, we examined the 311 summary report of operator related commendations and complaints. The following are some key findings from the 2015 ETS Customer Feedback Analysis based on data from the 311 call centre:

- Operator-related tickets comprised 53% of all tickets received
- 13% of these tickets were commendations, a 6% annual increase
- The most frequent complaint was operators missing zone boarding (11%), followed by general driving manner and departing late (9% each).
- The top 20 of all Operator-related Complaints (6%) were received by 1% of Operators

Based on this research and feedback analysis conducted by ETS, it is evident that overall operators provide excellent service, and are a key reason why customers are generally satisfied with ETS.

## 2. Best Practices in Transit Operator Training and Conduct

The training that operators receive greatly influences the type of service customers receive as this training equips drivers with the necessary knowledge to understand what customers expect, how to anticipate needs, and how to provide great service.

Based on our research of best practices in operator training, the following are most significant:

- Training programs should be continually evaluated and updated to ensure alignment with industry standards, best practices and community requirements and expectations.<sup>5</sup>
- Customer service is identified as one of the key topics to develop safe and professional operators. Typical components include communication skills, disability and sensitivity training, and customer/community relations.
- Having a process for targeted retraining and probationary review
- Developing a comprehensive and consistent refresher training program to refresh operator skills on a periodic basis whether that skill is for new equipment, or being out of service for more than 60 days<sup>6</sup>
- Periodic retraining is recommended every 2 years for drivers
- Having an incentives/rewards programs to encourage and reward the right types of behaviour
- Bring in people with disabilities to share experiences/video
- Have operators experience firsthand through simulation a “disability” to understand the types of needs customers with certain disabilities may have.

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<sup>5</sup> <http://www.apta.com/resources/standards/Documents/APTA-BTS-BO-RP-001-07.pdf>

<sup>6</sup>

<http://www.wstip.org/Radio%20Spots/A%20Best%20Practice%20for%20Operator%20Training%202012%2007%2017.pdf>

The following 4 over-arching principles of conduct are identified as key success factors in providing quality customer service:

- Always put service over schedule
- Where possible assist customers with directions/information
- Don't pre-judge customers on past experiences
- Provide explanations for delays/disruptions if known

### **Case Study: The Value and Potential of Benefits of Industry Leading Training**

In 2013, National Express (a UK Coach operator) developed an industry-leading training program that won the 2013 Learning Project of the Year. It gained the full support of management, staff and the Union. The implementation of the programme has changed the culture and attitude at all levels within the organisation.<sup>7</sup>

Since its launch, National Express Bus has recorded a 50% reduction in passenger injuries during a 12-month period where more than 274 million passengers have been transported over 70 million miles.

### **Best Practices in Recruitment / Selection**

The American Public Transportation Association (APTA) researched and developed a process for selecting reliable, safe and customer-oriented bus operators. Their Bus Operator Selection Survey (BOSS) consists of a pre-employment screening survey and structured interview process.

Based on APTA's study of over 800 bus operators hired using the BOSS system, they cite the following results<sup>8</sup>:

- 20% fewer accidents per year
- An average of seven fewer missed days per operator
- Transit staff indicated they saved \$2,500 per operator in the first year's costs for absenteeism, tardiness, accident/incident liability, training drop-outs, and by interviewing fewer candidates to fill the positions.

This may be something to explore further or try as a pilot project given the tremendous benefits boasted by APTA.

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<sup>7</sup> <http://www.trainingzone.co.uk/lead/culture/the-learning-award-winners-2013>

<sup>8</sup> <http://www.apta.com/members/memberprogramsandservices/Pages/boss.aspx>

### Opportunities for ETS to Consider

- Partner or collaborate with other leading transit agencies to exchange information on their training programs, such as learning objectives in key areas, scope of curriculum, and frequency of retraining or refresher training.
- Benchmark with comparable Canadian transit agencies as to the level of training provided to operators, both initially and ongoing, to ensure ETS operators are given the knowledge and skills necessary to provide exceptional service in any circumstance.
- Given the tremendous benefits boasted by APTA, their BOSS selection process may be something worthwhile to explore or consider piloting in the future.
- Examine existing rewards/incentives programs for operators to further encourage providing great customer service.

### APPENDIX 1 - Operator Selection - American Public Transit Association

APTA BTS-BO-RP-001-07

Document Number Changed June 2009

Part 10: Customer Service Training

#### 10.1 Role of professional transit operator

1. Understanding the role of mass transit in meeting the individual customer needs.
  - Transit dependent
  - Discretionary rider
  - Modal choices
2. Come to work ready to work
  - Attitude
  - Appearance
  - Fitness for duty

#### 10.2 Customer basics

1. Who is the customer?
  - Riders and non-riders
  - Internal and external
  - Customers as voters
2. Customer service policy/performance expectations
3. Who are the riders?
  - Different levels of abilities
    - Cognitive
    - Physical
  - Socio-economic status
  - Local or visitor
  - Age
  - Cultural issues/diversity
4. Customer behavior (acceptable vs. un-acceptable)
5. Customer feedback process

#### 10.3 Communications

- Attitude matters
  - Operator sets the tone
  - Be courteous and patient
  - You have a choice
- Active listening skills
- Body language
- Tone of voice
- Make eye contact
- Treat all people with respect, dignity and empathy.
- Communicating with people with special needs

- Alternate communications/Passenger Assistance Cards
- Cultural/Language Awareness

### 10.4 Difficult situations

- 1) Conflict resolution
- 2) Understanding emotional/personal 'hot buttons'
- 3) Common triggers:
  - Fare collection
  - Food or drink
  - Intoxicated/under the influence
  - Stop requests
  - Securement
  - Customer to customer conflicts
  - Lost passengers
  - Bus off route
  - Inflammatory language
  - Pass-up/flagging
  - Service interruptions
  - Priority seating

### 10.5 Customers with disabilities

- 1) Understand disability from first person experience
- 2) Importance of using kneeler and wheel chair lift/ramp
- 3) Customer assistance
- 4) Language sensitivity (politically correct)
- 5) Communicating with people with disabilities      ex. ADA announcements

APPENDIX 2 - Codes of Conduct

ETS Bylaw on Ticket

- Buses/DATS: Show ticket to Operator upon boarding then deposit in farebox. Request a transfer if required.
- LRT: Prior to entering proof of payment area, place ticket in validator to time-date it. The validated ticket is your proof of payment. You must be in possession of your validated ticket within proof of payment areas and while on board the LRT. This ticket is not transferable once validated.
- This ticket remains the property of ETS and must be surrendered upon request.
- ETS does not replace lost or stolen tickets.
- The conduct of transit passengers is subject to Bylaw No. 8353.

312060 - 153 - 5257

**2018 EXPIRY**  
**ADULT**  
 TICKET MUST BE  
 VALIDATED FOR USE ON LRT  
 NOT VALID AFTER  
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- The conduct of transit passengers is subject to Bylaw No. 8353.

### Draft Code of Conduct for ETS Users

In order to ensure that our use of the ETS system is a relaxing and enjoyable experience let us make sure to treat fellow passengers, ETS staff and equipment with care and respect.

To achieve the above goals I will:

- Show respect and consideration to other users, operators and ETS staff,
- Pay the correct fare and have it ready when boarding the bus,
- Allow less mobile passengers priority in seating,
- Hold my bag or backpack in front me while on the bus or train,
- Keep my music and conversations at a low volume,
- Avoid blocking exit doors,
- Avoid eating while on the ETS system (non-alcoholic drinks are permitted providing their container has a spill-proof lid attached),
- Avoid littering or putting my feet on the seats,
- Use the rear doors when exiting the bus,
- Refrain from interfering with other passengers or operators and avoid the use of foul or insulting language,
- Avoid soliciting or distributing materials unless previously permitted by ETS,
- Allow space for LRT passengers to leave the train before I try to board