PIVOTAL RESEARCH Inc.TM



Customer Satisfaction Tracking Report (April 2023 – June 2023)

DIVOTAL RESEARCHine

Responsibility for Local Transit System

Current Reporting Quarter: Q2 2023 (APR - JUNE)

	Total n = 2032	Victoria CMA n = 592	Central Fraser Valley n = 152	Kamloops n = 142	Kelowna n = 133	Nanaimo n = 138	Prince George n = 147	Whistler n = 46	Chilliwack n = 97	Campbell River n = 67	ComoxValley n = 80	Cowichan Valley n = 99	Penticton n = 92	Vernon n = 93	Tier 3 n = 154
BCTransit	79%	88%	68%	80%	84%	74%	83%	71%	78%	78%	81%	81%	71%	77%	59%
Local/municipal government	29%	26%	32%	24%	28%	31%	27%	46%	39%	35%	21%	23%	26%	24%	41%
TransLink	8%	7%	7%	3%	7%	6%	13%	28%	7%	10%	7%	7%	9%	9%	7%
Other	2%	2%	6%	1%	1%	1%	0%	3%	3%	7%	2%	1%	4%	3%	4%
Don't know	5%	2%	9%	10%	4%	7%	5%	2%	5%	3%	6%	7%	5%	9%	11%

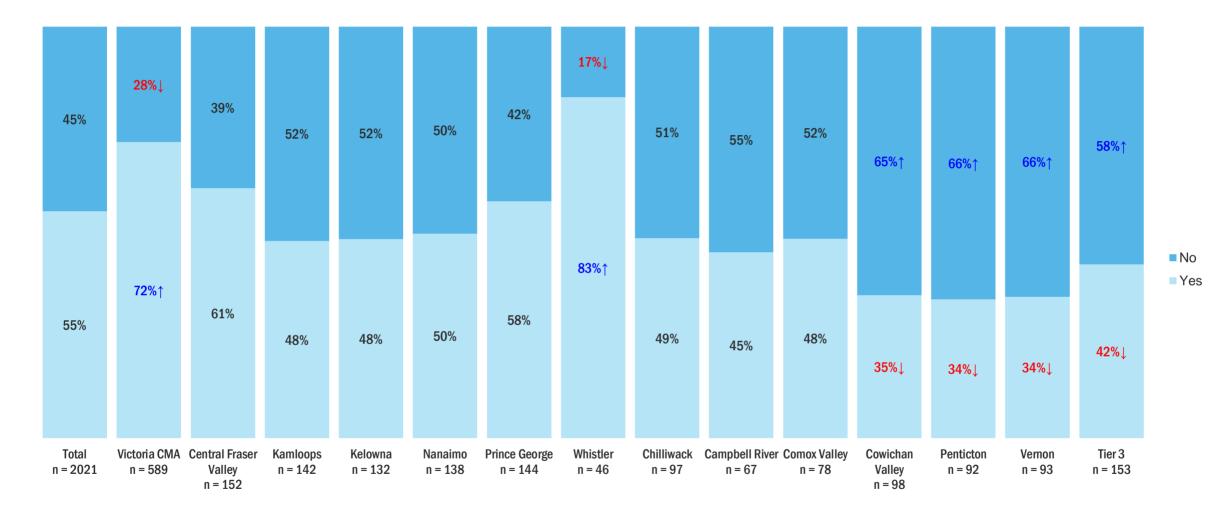
Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



Q1 Who do you think is responsible for your local transit system?

Past Year Local Transit Use

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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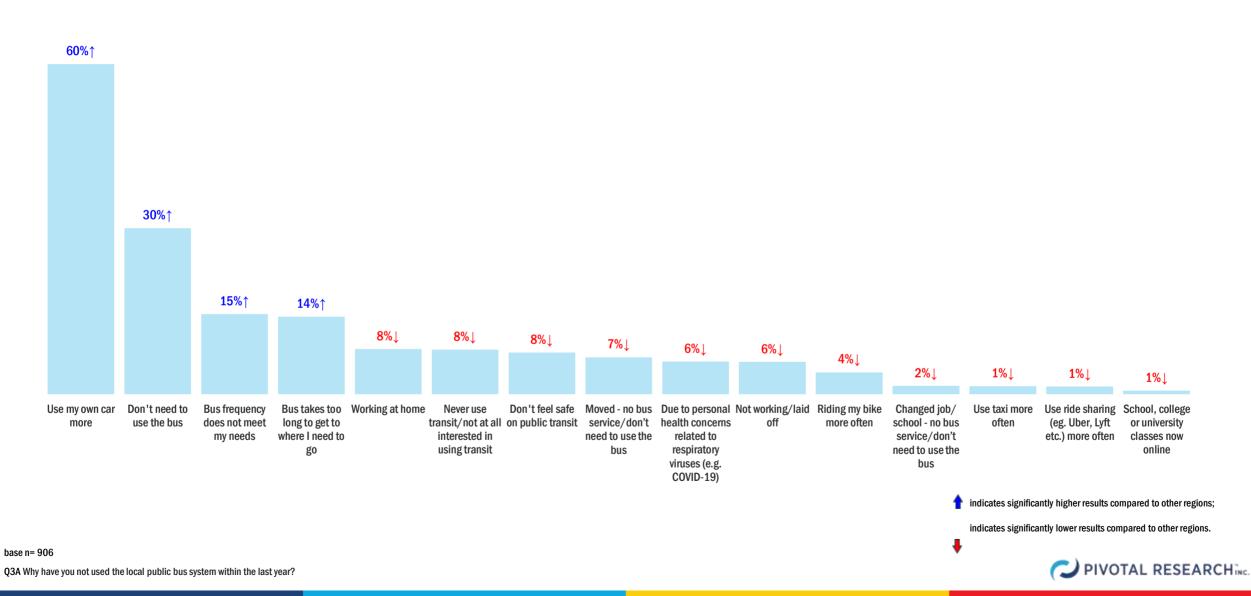


Q3 Have you used the local public bus system within the last year?

*Don't know and Prefer not to answer is excluded from the graph

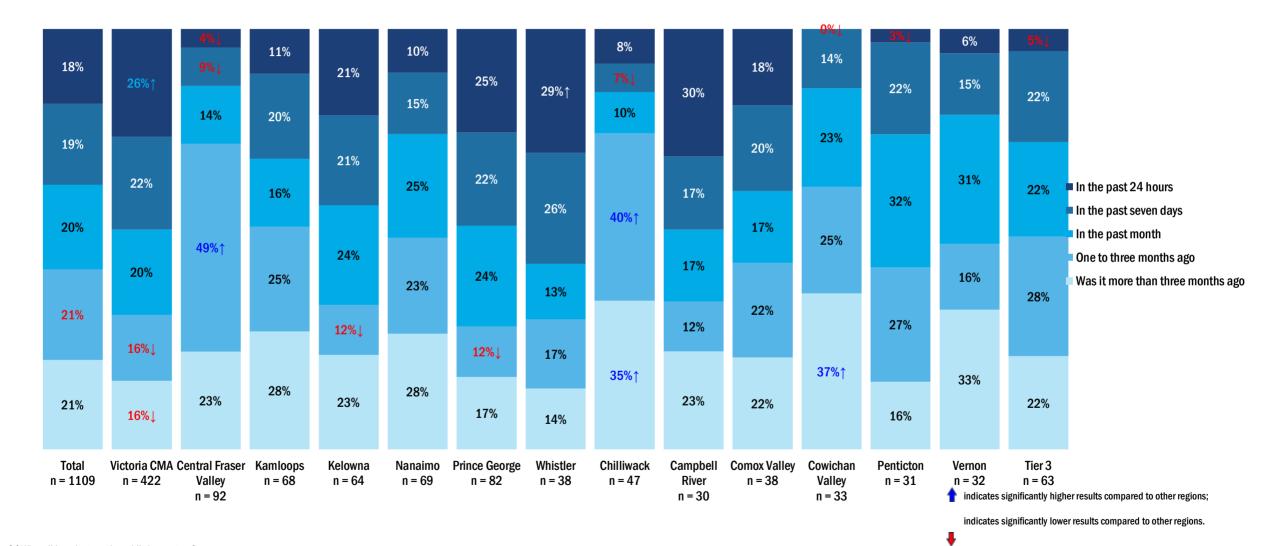
Reasons Not to Use the Local Public Bus System

Current Reporting Quarter: Q2 2023 (APR - JUNE)



Most Recent Local Transit Use

Current Reporting Quarter: Q2 2023 (APR - JUNE)

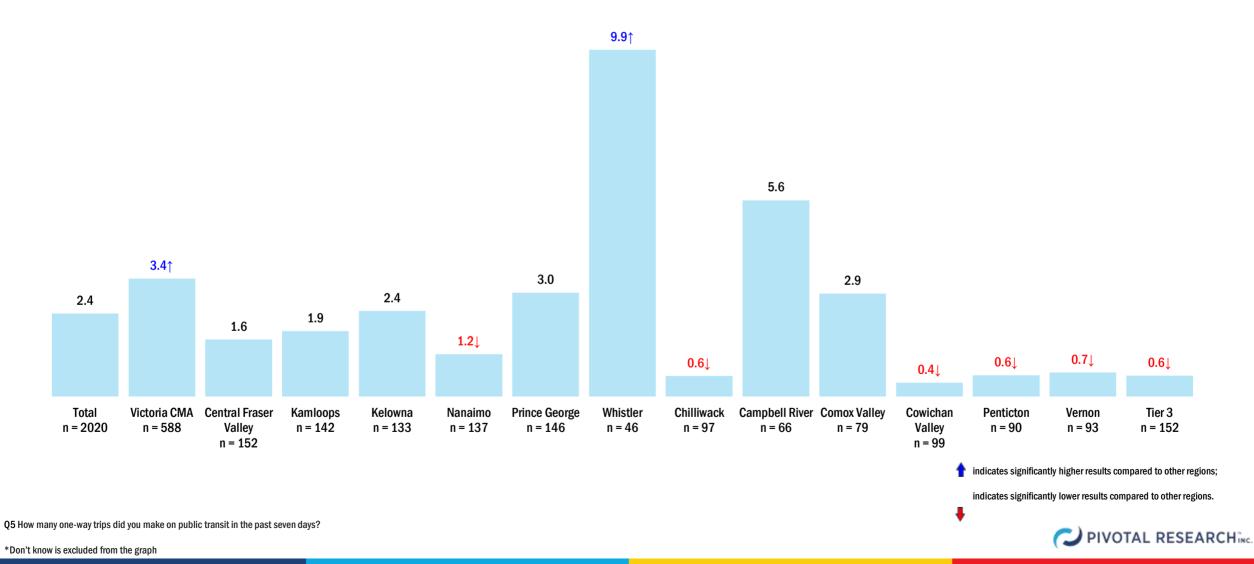


Q4 When did you last use the public bus system?

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Average Number of One-way Trips in the Past Seven Days

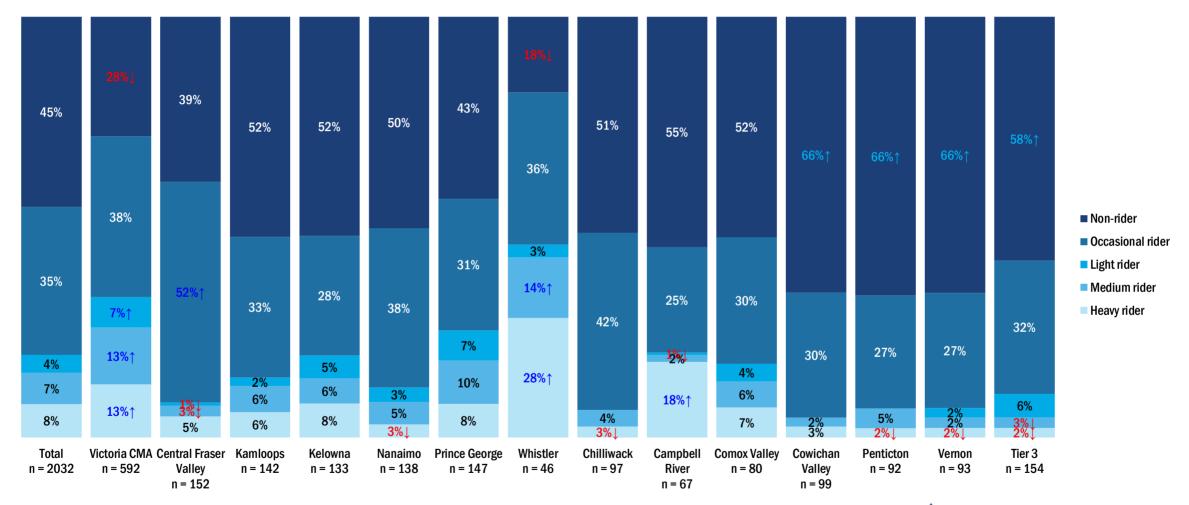
Current Reporting Quarter: Q2 2023 (APR - JUNE)



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Rider Usage Group

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

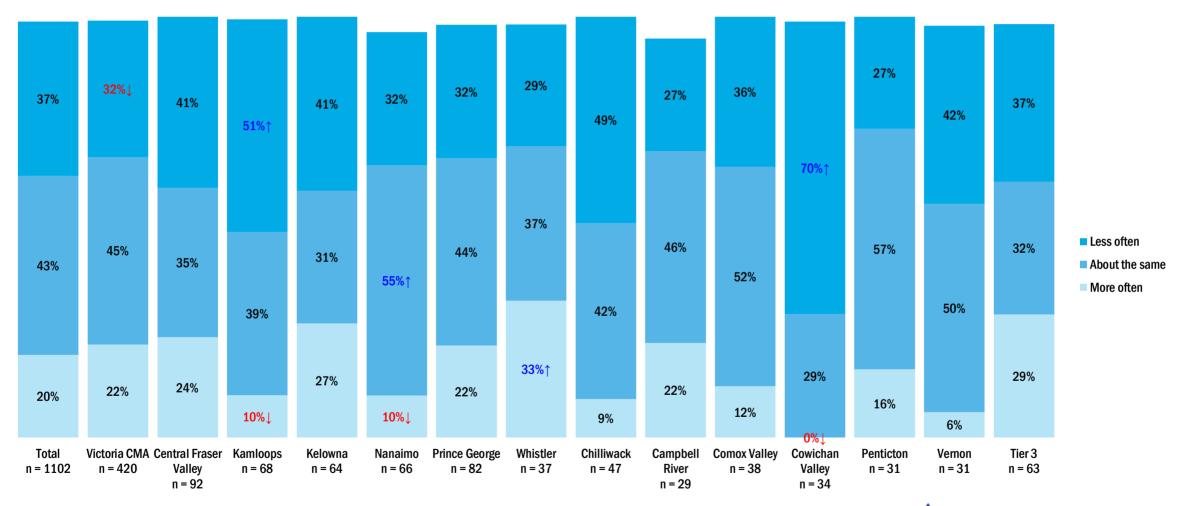
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Q5 How many one-way trips did you make on public transit in the past seven days?

Past Year Change in Local Bus System Use

Current Reporting Quarter: Q2 2023 (APR - JUNE)



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indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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Q6A Compared to a year ago, would you say that you use the local bus system more often now, less often or about the same?

*Prefer not to answer is excluded from the graph but included in calculating the percentage

Modes of Transportation Now Used (More often)

Current Reporting Quarter: Q2 2023 (APR - JUNE)

	Total n = 409	Victoria CMA n = 137	Central Fraser Valley n = 38	Kamloops n = 34	Kelowna n = 26	Nanaimo n = 22	Prince George n = 26	Whistler n = 11	Chilliwack n = 23	Campbell River n = 8	ComoxValley n = 13	Cowichan Valley n = 24	Penticton n = 8	Vernon n = 13	Tier3 n = 24
Drive alone (car/truck)	56%	54%	55%	68%	62%	71%	45%	67%	49%	50%	34%	62%	60%	56%	54%
Carpool or share a ride as driver	11%	7%	7%	16%	13%	3%	12%	46%	8%	12%	27%	8%	0%	18%	9%
Carpool or share a ride as passenger	18%	19%	18%	23%	25%	3%	13%	23%	25%	12%	13%	19%	22%	17%	12%
Taxi	12%	7%	34%	14%	2%	26%	8%	15%	16%	12%	8%	9%	19%	7%	11%
Bicycle	14%	16%	5%	6%	8%	0%	22%	12%	13%	38%	10%	3%	19%	24%	35%
Motorcycle/moped/s cooter	4%	2%	3%	4%	2%	5%	5%	15%	8%	0%	0%	13%	0%	0%	3%
Walking/rollerblading /skateboarding/joggi ng	32%	35%	38%	30%	25%	37%	48%	42%	37%	0%	29%	12%	0%	30%	39%
Ride share (e.g. Uber, Lyft, etc.)	5%	1%	6%	3%	0%	3%	4%	34%	24%	12%	8%	3%	0%	12%	10%
Other	6%	9%	0%	4%	0%	3%	4%	6%	0%	8%	10%	17%	0%	9%	6%
Don't know	0%	1%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Q6B Now that you are using the local bus system less often, what mode(s) of transportation are you using more?

Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



Modes of Transportation Now Used (Less often)

Current Reporting Quarter: Q2 2023 (APR - JUNE)

	Total n = 219	Victoria CMA n = 94	Central Fraser Valley n = 22	Kamloops n = 7	Kelowna n = 17	Nanaimo n = 7	Prince George n = 18	Whistler n = 12	Chilliwack n = 4	Campbell River n = 7	ComoxValley n = 5	Cowichan Valley n = 0	Penticton n = 5	Vernon n = 2	Tier 3 n = 19
Drive alone (car/truck)	56%	62%	50%	33%	67%	33%	47%	37%	56%	84%	78%	NaN	42%	0%	61%
Carpool or share a ride as driver	11%	15%	13%	11%	4%	14%	6%	14%	0%	0%	0%	NaN	14%	0%	6%
Carpool or share a ride as passenger	19%	21%	21%	32%	25%	23%	0%↓	8%	0%	46%	48%	NaN	42%	0%	5%
Taxi	34%	28%	32%	29%	41%	18%	70% ↑	55%	44%	31%	48%	NaN	58%	36%	11%↓
Bicycle	15%	17%	3%	11%	12%	9%	0%	33% ↑	26%	47% ↑	22%	NaN	28%	0%	12%
Motorcycle/moped/s cooter	6%	5%	0%	9%	15%	0%	0%	0%	0%	31% ↑	48% ↑	NaN	0%	0%	0%
Walking/rollerblading /skateboarding/joggi ng	29%	34%	10% ↓	32%	36%	49%	25%	8%	45%	47%	0%	NaN	28%	0%	27%
Ride share (e.g. Uber, Lyft, etc.)	15%	12%	11%	46% ↑	17%	0%	33% ↑	19%	0%	31%	48% ↑	NaN	0%	0%	0%
Other	1%	0%	2%	14% ↑	0%	0%	0%	0%	0%	0%	0%	NaN	0%	64% ↑	0%
Don't know	1%	0%	0%	0%	0%	0%	0%	6% ↑	0%	0%	0%	NaN	0%	0%	6% ↑

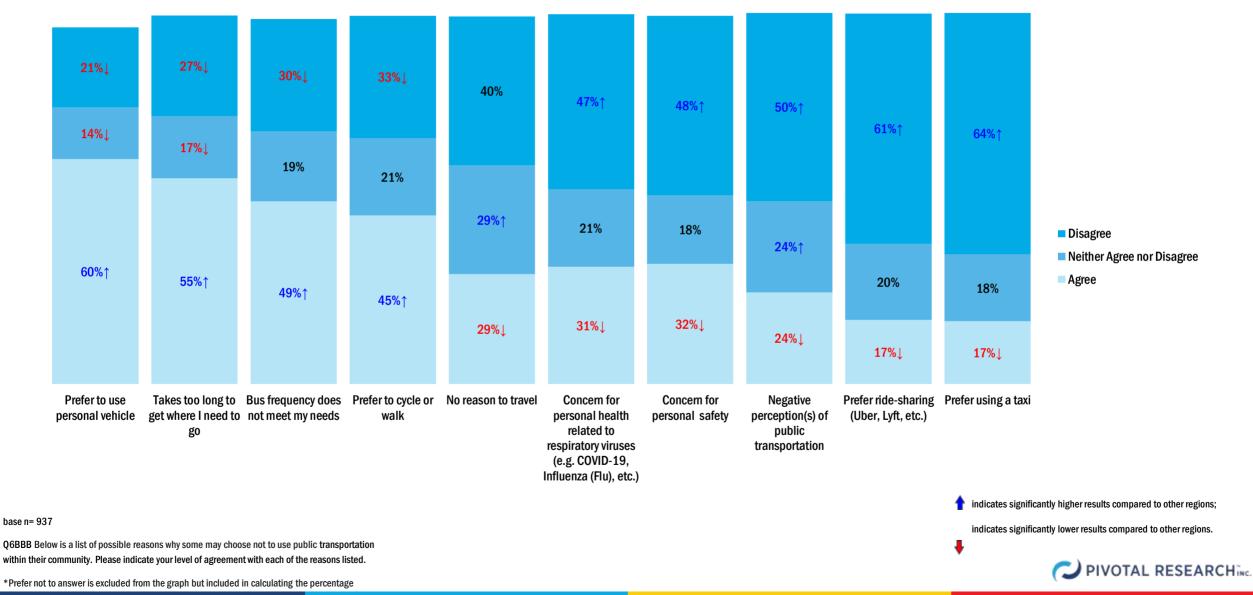
Q6B Now that you are using the local bus system less often, what mode(s) of transportation are you using more?

Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



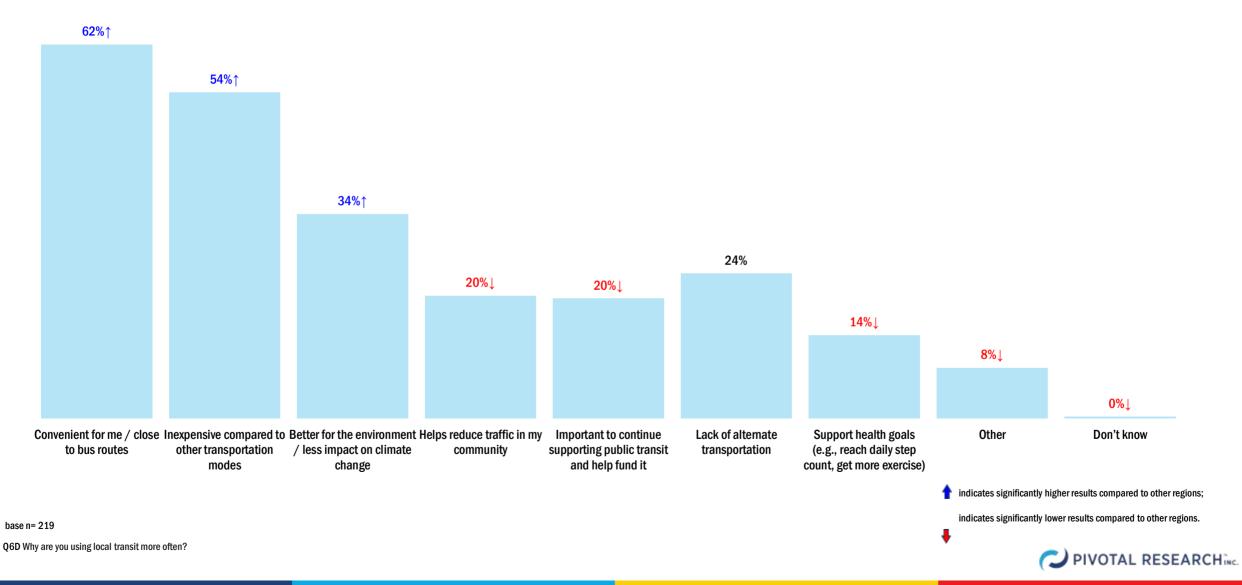
Likelihood of Reasons to not use Public Transportation

Current Reporting Quarter: Q2 2023 (APR - JUNE)



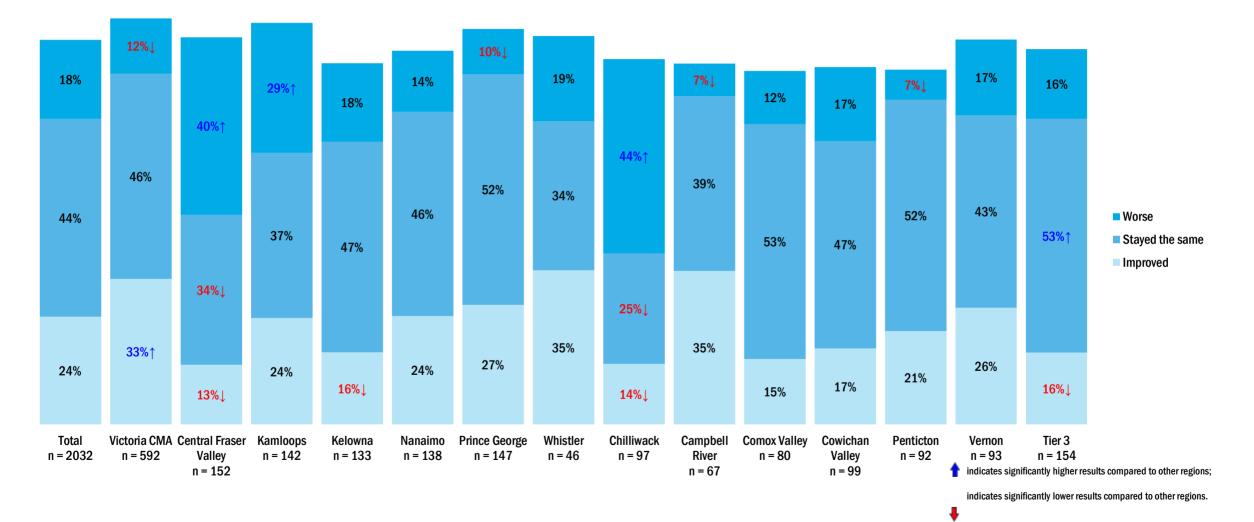
Reasons to use Local Transit More Often

Current Reporting Quarter: Q2 2023 (APR - JUNE)



Past Year Change in Local Bus System

Current Reporting Quarter: Q2 2023 (APR - JUNE)



Q7 Compared to a year ago, would you say that the local bus system has improved, stayed the same or become worse?

*Don't know is excluded from the graph but included in calculating the percentage



Perceptions of Transit Service (% Rating 4 or 5)

Current Reporting Quarter: Q2 2023 (APR - JUNE)

	Total n = 2032	Victoria CMA n = 592	Central Fraser Valley n = 152	Kamloops n = 142	Kelowna n = 133	Nanaimo n = 138	Prince George n = 147	Whistler n = 46	Chilliwack n = 97	Campbell River n = 67	Comox Valley n = 80	Cowichan Valley n = 99	Penticton n = 92	Vernon n = 93	Tier3 n = 154
Fare prices are reasonable	49%	50%	50%	47%	49%	51%	50%	46%	38%	47%	52%	42%	61%	54%	47%
Bus drivers are courteous	62%	64%	62%	63%	54%	62%	70%	47%	50%	59%	65%	56%	71%	63%	64%
Frequency of scheduled service	36%	42%	32%	27%	23%	31%	47%	37%	24%	39%	31%	28%	47%	39%	35%
Buses run on time/on schedule	47%	46%	38%	43%	40%	48%	62%	40%	28%	51%	51%	53%	60%	51%	49%
Buses are clean/well-maintained	54%	57%	52%	52%	49%	51%	60%	55%	35%	60%	58%	46%	68%	62%	52%
Availability and accuracy of schedule information	49%	51%	48%	44%	48%	46%	58%	41%	33%	50%	48%	43%	66%	47%	49%
Buses not being overcrowded	47%	33%	50%	43%	45%	51%	67%	34%	49%	59%	58%	49%	66%	67%	52%
Buses have a direct route	41%	45%	34%	33%	36%	36%	45%	40%	33%	41%	35%	39%	58%	32%	48%
Bus fare payment options are convenient and easy to use	47%	48%	53%	47%	46%	42%	56%	52%	39%	43%	39%	41%	50%	50%	42%
Buses have good connections with reasonable wait times	36%	41%	33%	31%	31%	39%	45%	24%	21%	39%	34%	27%	43%	36%	33%
Bus stops have enough amenities such as shelters, benches, information and trash cans	33%	37%	33%	29%	38%	27%	34%	34%	32%	45%	32%	22%	39%	27%	28%
Bus stops are clean and well maintained	40%	45%	40%	40%	35%	35%	41%	43%	21%	49%	45%	27%	54%	40%	40%
Trip duration, that is the time from when you boarded to the time you got off the bus	44%	48%	42%	36%	42%	34%	51%	33%	32%	56%	44%	44%	57%	36%	45%
Sense of safety and security	44%	47%	37%	40%	35%	40%	52%	53%	34%	46%	53%	37%	52%	48%	42%
Overall	46%	53%	42%	39%	38%	39%	47%	59%	29%	56%	49%	37%	55%	42%	41%

Q11 and Q12 Based on your own experience or what you may have seen or heard, we would like you to rate the local transit system on several areas. Using a scale of 1 to 5 where 1 means extremely poor and 5 means excellent, please indicate your level of agreement with each of the following statements. Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



*Prefer not to answer is excluded from the table but included in calculating the percentage

Perceptions of Transit Service (Mean Scores)

Current Reporting Quarter: Q2 2023 (APR - JUNE)

Average	Total n = 1821	Victoria CMA n = 565	Central Fraser Valley n = 135	Kamloops n = 125	Kelowna n = 122	Nanaimo n = 123	Prince George n = 135	Whistler n = 39	Chilliwack n = 83	Campbell River n = 55	Comox Valley n = 66	Cowichan Valley n = 85	Penticton n = 71	Vernon n = 82	Tier3 n = 135
Fare prices are reasonable	3.5	3.5	3.5	3.4	3.6	3.5	3.6	3.3	3.4	3.7	3.6	3.5	3.9	3.6	3.5
Bus drivers are courteous	3.8	3.8	3.8	3.8	3.6	3.7	4.0	3.6	3.5	3.8	3.9	3.8	4.2	3.8	3.9
Frequency of scheduled service	3.1	3.3	3.0	2.9	2.9	3.0	3.4	3.0	2.8	3.2	3.1	2.9	3.5	3.1	3.1
Buses run on time/on schedule	3.4	3.3	3.2	3.2	3.3	3.3	3.7	3.2	3.0	3.5	3.5	3.6	3.8	3.6	3.5
Buses are clean/well-maintained	3.6	3.6	3.5	3.6	3.4	3.5	3.7	3.7	3.2	3.8	3.8	3.5	3.9	3.7	3.6
Availability and accuracy of schedule information	3.4	3.4	3.4	3.3	3.6	3.3	3.7	3.4	3.1	3.5	3.5	3.5	3.9	3.4	3.4
Buses not being overcrowded	3.4	3.0	3.5	3.3	3.3	3.4	3.9	3.3	3.4	3.9	3.7	3.6	4.0	3.9	3.7
Buses have a direct route	3.2	3.3	3.0	3.0	3.2	3.1	3.3	3.0	3.0	3.3	3.2	3.2	3.6	3.1	3.4
Bus fare payment options are convenient and easy to use	3.5	3.4	3.6	3.5	3.5	3.3	3.7	3.6	3.3	3.6	3.3	3.4	3.7	3.6	3.4
Buses have good connections with reasonable wait times	3.1	3.3	3.0	3.0	3.1	3.1	3.3	2.9	2.8	3.1	3.1	3.0	3.4	3.1	3.1
Bus stops have enough amenities such as shelters, benches, information and trash cans	3.0	3.1	3.1	2.9	3.2	2.8	3.0	3.3	2.9	3.3	2.8	2.6	3.1	2.9	2.9
Bus stops are clean and well maintained	3.2	3.3	3.2	3.1	3.1	3.0	3.2	3.4	2.8	3.4	3.2	2.9	3.5	3.3	3.3
Trip duration, that is the time from when you boarded to the time you got off the bus	3.4	3.5	3.3	3.1	3.4	3.2	3.6	3.0	3.2	3.7	3.4	3.4	3.7	3.3	3.4
Sense of safety and security	3.3	3.4	3.1	3.0	3.1	3.0	3.4	3.7	3.1	3.4	3.5	3.2	3.6	3.3	3.3
Overall	3.4	3.6	3.2	3.2	3.2	3.2	3.5	3.6	3.0	3.7	3.4	3.1	3.8	3.4	3.3

Q11 and Q12 Based on your own experience or what you may have seen or heard, we would like you to rate the local transit system on several areas. Using a scale of 1 to 5 where 1 means extremely poor and 5 means excellent, please indicate your level of agreement with each of the following statements. Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



*Prefer not to answer is excluded from the table

Reason for using Transit Current Reporting Quarter: Q2 2023 (APR - JUNE)

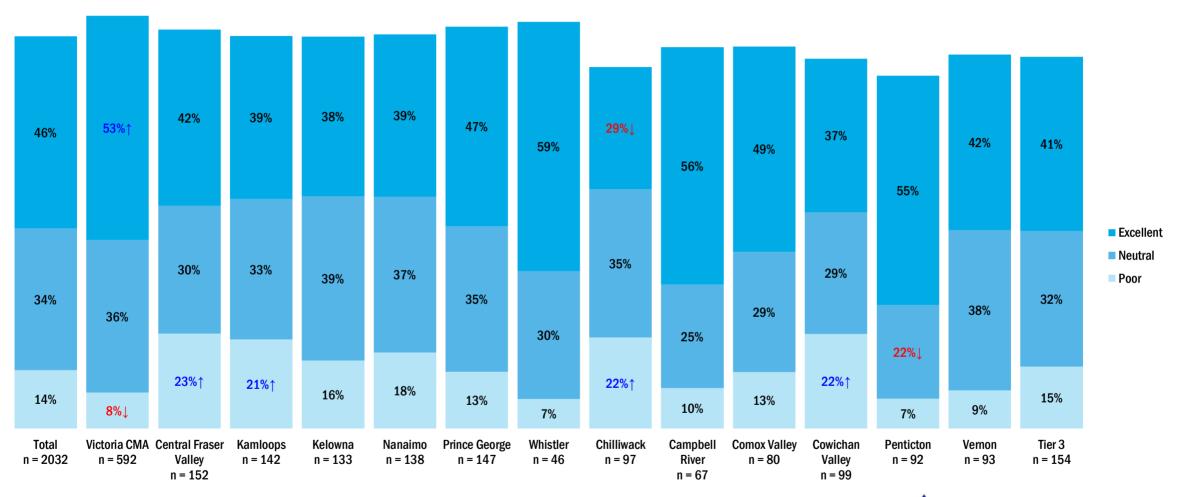
	Total n = 1115	Victoria CMA n = 424	Central Fraser Valley n = 92	Kamloops n = 68	Kelowna n = 64	Nanaimo n = 69	Prince George n = 83	Whistler n = 38	Chilliwack n = 47	Campbell River n = 30	Comox Valley n = 38	Cowichan Valley n = 34	Penticton n = 31	Vernon n = 32	Tier3 n = 65
Going to or from work	24%	25%	22%	15%	27%	16%	35%	50%	36%	25%	10%	12%	15%	11%	13%
Going to or from school	6%	6%	5%	15%	8%	3%	7%	4%	1%	6%	5%	0%	2%	4%	4%
Going to or from shopping	19%	13%	28%	21%	27%	14%	26%	15%	23%	16%	35%	25%	21%	17%	20%
Conducting personal business (such as going to the doctor or bank, etc.)	19%	16%	27%	17%	14%	22%	16%	5%	21%	10%	22%	29%	29%	32%	24%
Entertainment or social reasons (such as visiting friends or relatives)	19%	20%	15%	21%	13%	21%	11%	21%	18%	26%	17%	19%	31%	11%	23%
Going to the ferry terminal/airport	9%	13%	1%	3%	0%	20%	1%	5%	1%	17%	5%	8%	0%	16%	7%
Other	4%	5%	1%	4%	11%	3%	3%	0%	0%	0%	6%	8%	2%	8%	9%
Don'tknow	1%	0%	0%	4%	0%	1%	1%	0%	0%	0%	0%	0%	0%	2%	0%

Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



Overall Transit Experience

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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Q12 Using the following scale where 1 is extremely poor and 5 is excellent, how would you rate the local transit system overall?

*Don't know/not sure is excluded from the graph but included in the percentage calculation

Safety in Transit

Current Reporting Quarter: Q2 2023 (APR - JUNE)

	Total n = 1115	Victoria CMA n = 424	Central Fraser Valley n = 92	Kamioops n = 68	Kelowna n = 64	Nanaimo n = 69	Prince George n = 83	Whistler n = 38	Chilliwack n = 47	Campbell River n = 30	ComoxValley n = 38	Cowichan Valley n = 34	Penticton n = 31	Vernon n = 32	Tier3 n = 65
Feltsafe	71%	73%	69%	63%	61%	66%	72%	80%	62%	69%	79%	59%	80%	63%	78%
Felt unsafe	25%	24%	26%	29%	32%	29%	25%	12%	30%	28%	10%	33%	15%	26%	21%
Don't know/not sure	5%	3%	5%	8%	7%	5%	4%	8%	8%	3%	10%	8%	5%	12%	1%

Q13 During your most recent trip, were there parts of the trip where you felt unsafe?

*Don't know/not sure is excluded from the table

Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



NPS Score of Transit

Current Reporting Quarter: Q2 2023 (APR - JUNE)

	Total n = 1892	Victoria CMA n = 571	Central Fraser Valley n = 143	Kamloops n = 135	Kelowna n = 123	Nanaimo n = 127	Prince George n = 141	Whistler n = 44	Chilliwack n = 86	Campbell River n = 60	ComoxValley n = 73	Cowichan Valley n = 90	Penticton n = 74	Vernon n = 87	Tier3 n = 139
Detractors	50%	41%	61%	58%	65%	61%	43%	42%	56%	43%	49%	58%	43%	53%	53%
Passive	14%	14%	12%	7%	16%	14%	17%	18%	21%	12%	17%	15%	11%	12%	20%
Promotors	35%	45%	27%	35%	19%	25%	40%	40%	23%	45%	34%	28%	45%	35%	27%
NPS Score	-14.7	3.7	-33.3	-22.8	-45.3	-35.7	-3.3	-2.5	-32.8	2.4	-15.1	-29.6	2.3	-17.8	-26.1

Q16 How likely are you to recommend BC Transit to a friend or family member using a scale of 0 to 10 where 0 is "not at all likely" and 10 is "extremely likely"?

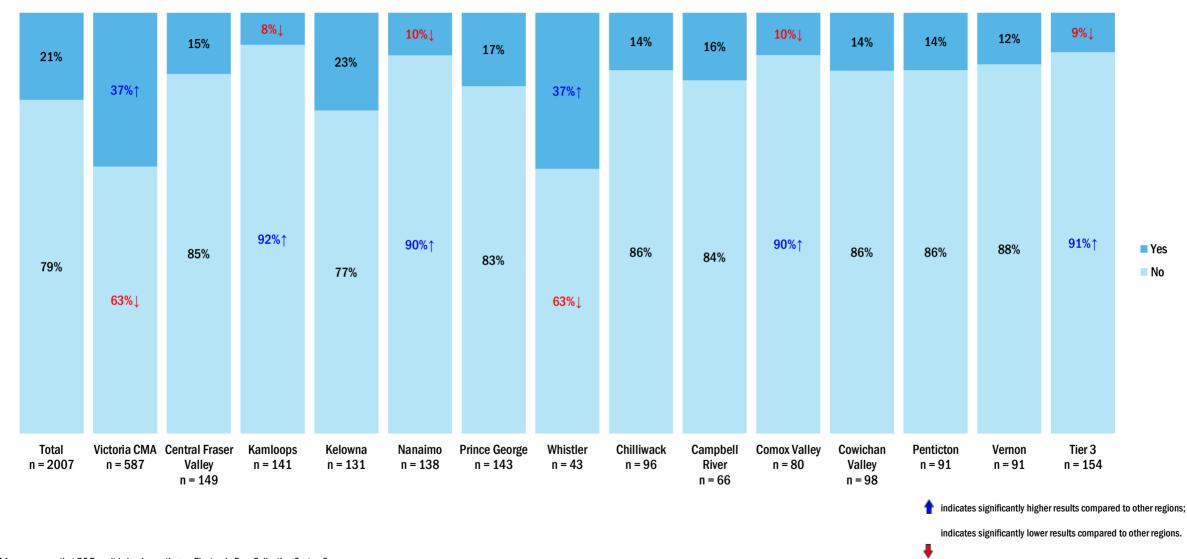
*Don't know/not sure is excluded from the table

Green highlighted cells indicates significantly higher results compared to other regions. Red highlighted cells indicates significantly lower results compared to other regions.



Awareness of Electronic Fare Collection System

Current Reporting Quarter: Q2 2023 (APR - JUNE)

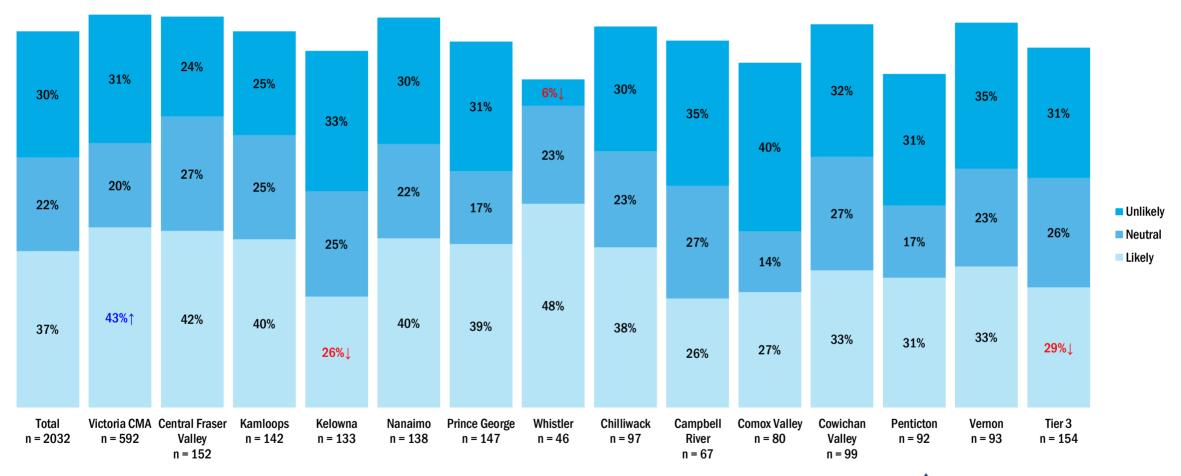


Q17 Are you aware that BC Transit is implementing an Electronic Fare Collection System?



Electronic Fare Impact

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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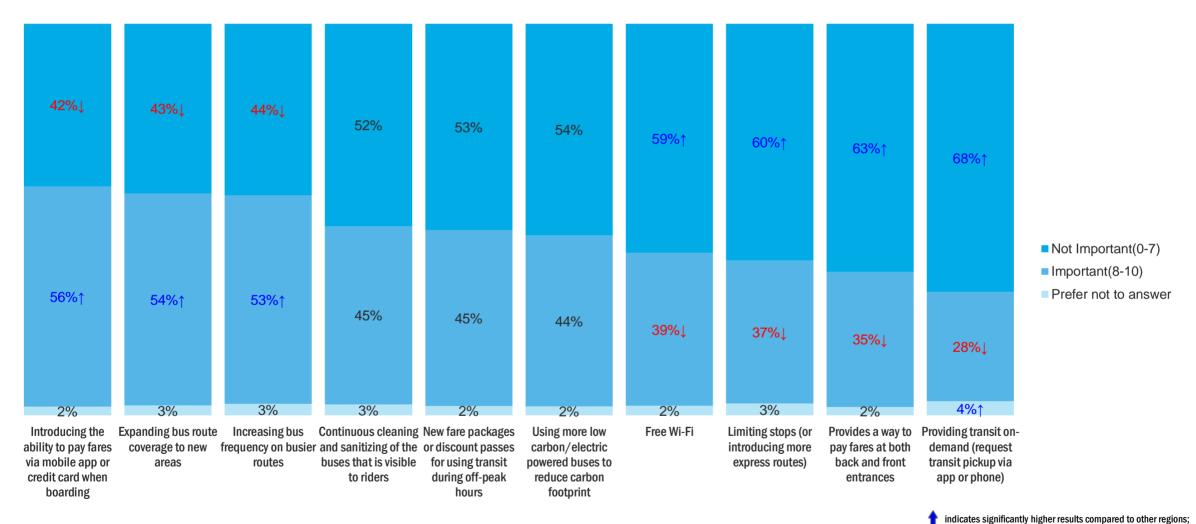


Q18 On a scale of 1 to 5 where 1 is Very Unlikely and 5 is Very Likely, how likely is it that the new electronic fare payment system will increase your future usage of public transport?

*Don't know/unsure is excluded from the graph but included in the percentage calculation

Key Improvements to Encourage use of Transit

Current Reporting Quarter: Q2 2023 (APR - JUNE)



base n= 2032

Q14 BC Transit is interested in understanding what key improvements they could make to encourage people to use transit more frequently. The following is a list of actions they are considering taking. On a scale of 1 to 10 where 1 is not at all important and 10 is extremely important, please rate how important each item would be in terms of encouraging you to take transit more often.

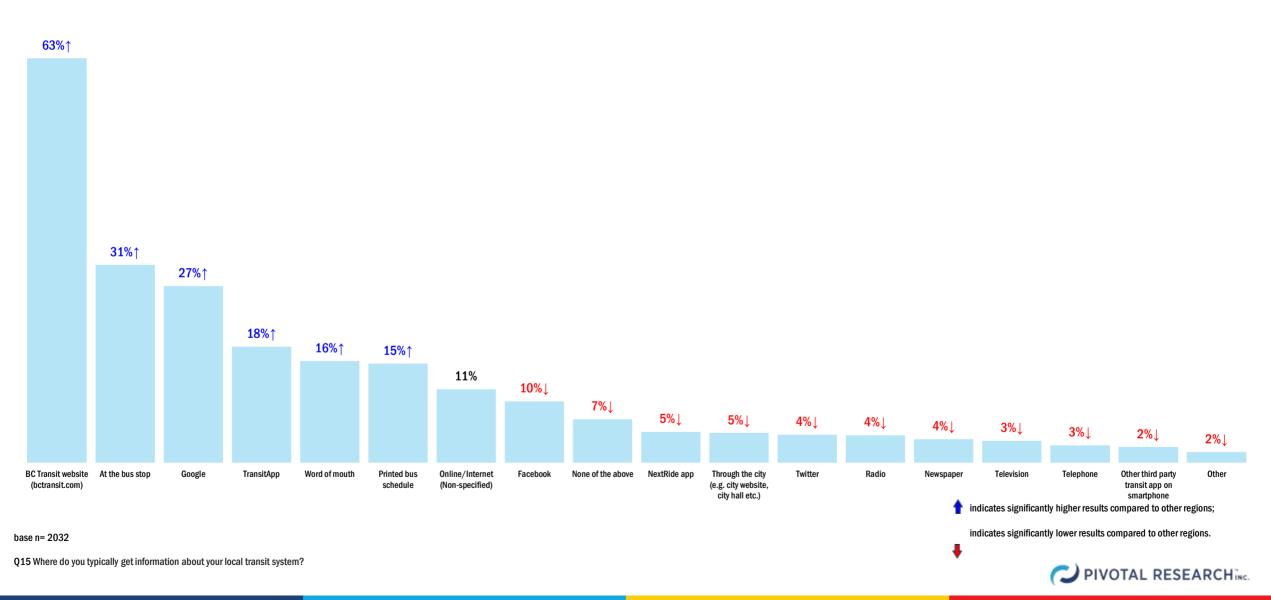
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indicates significantly lower results compared to other regions.



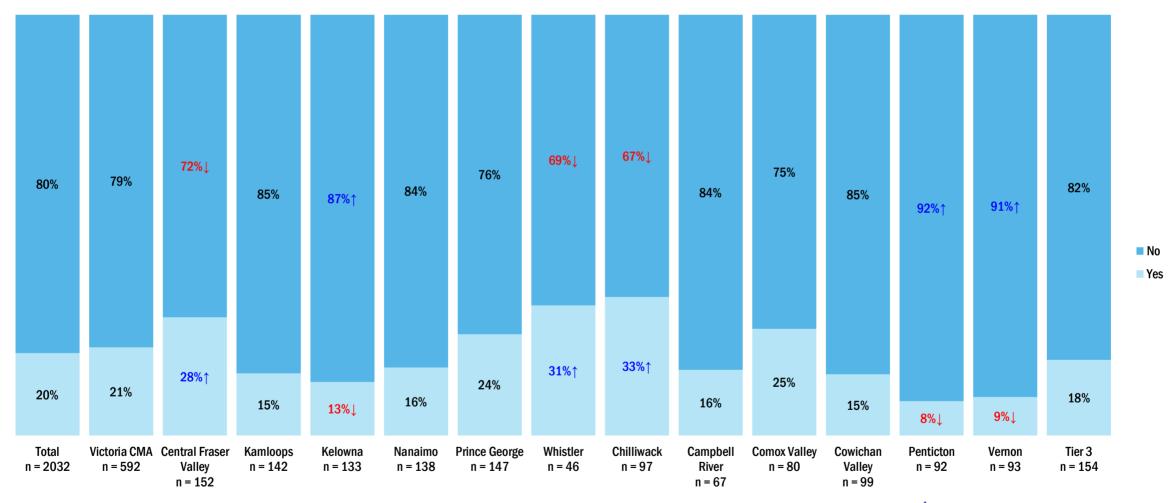
Source of Information on Local Transit

Current Reporting Quarter: Q2 2023 (APR - JUNE)



Taking Care of Children Aged 12 and Under

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

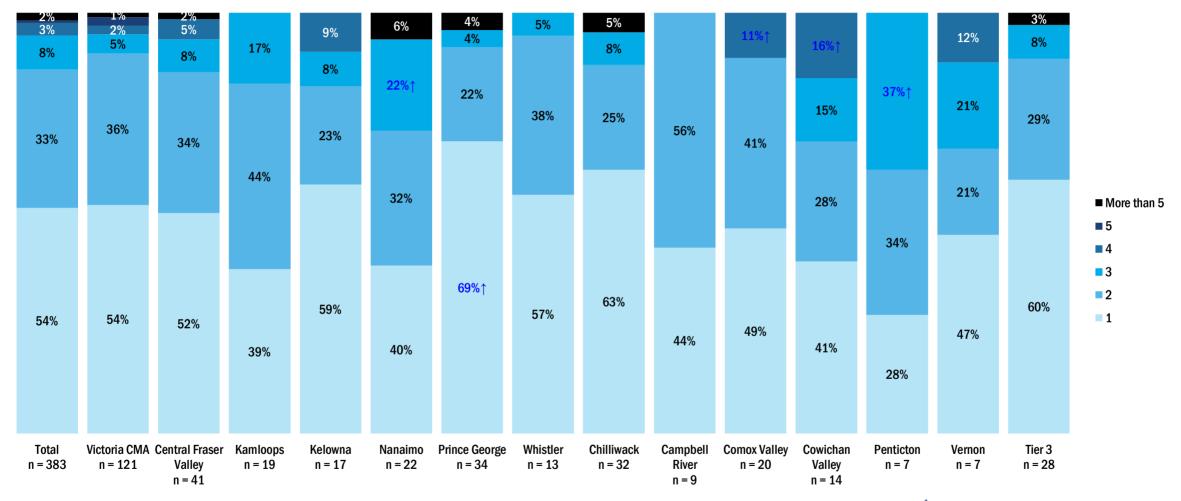
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X1 Are you taking care of children aged 12 and under (including anyone responsible for childcare e.g. parent, guardian, childcare provider, etc.)?

Average Number of Children Aged 12 and Under

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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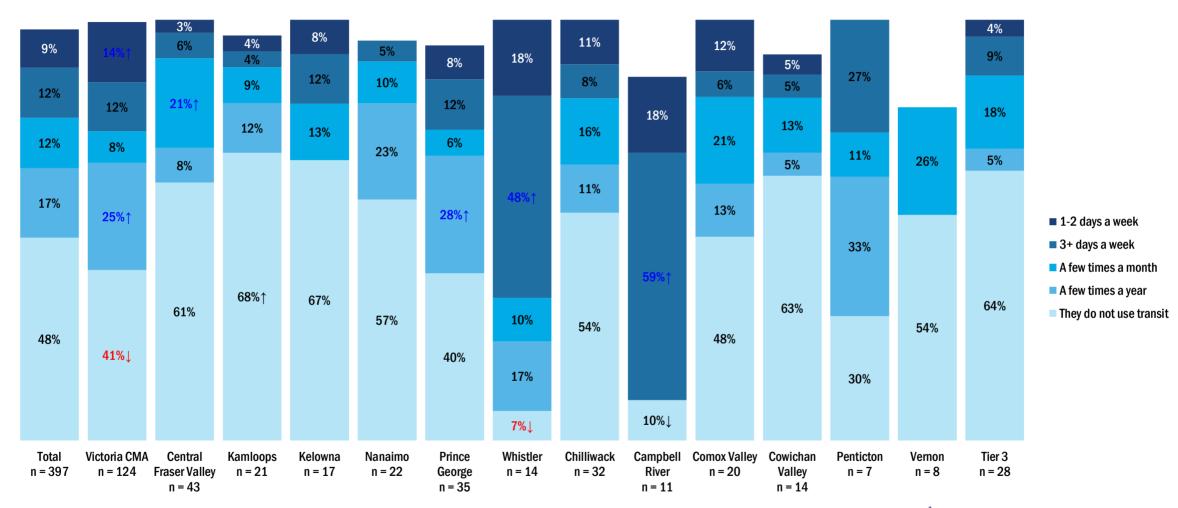


X2 How many children, age 12 and under, are in your care?

*Prefer not to answer is excluded from the graph

Frequency of Riding the Bus by Children 12 and Under

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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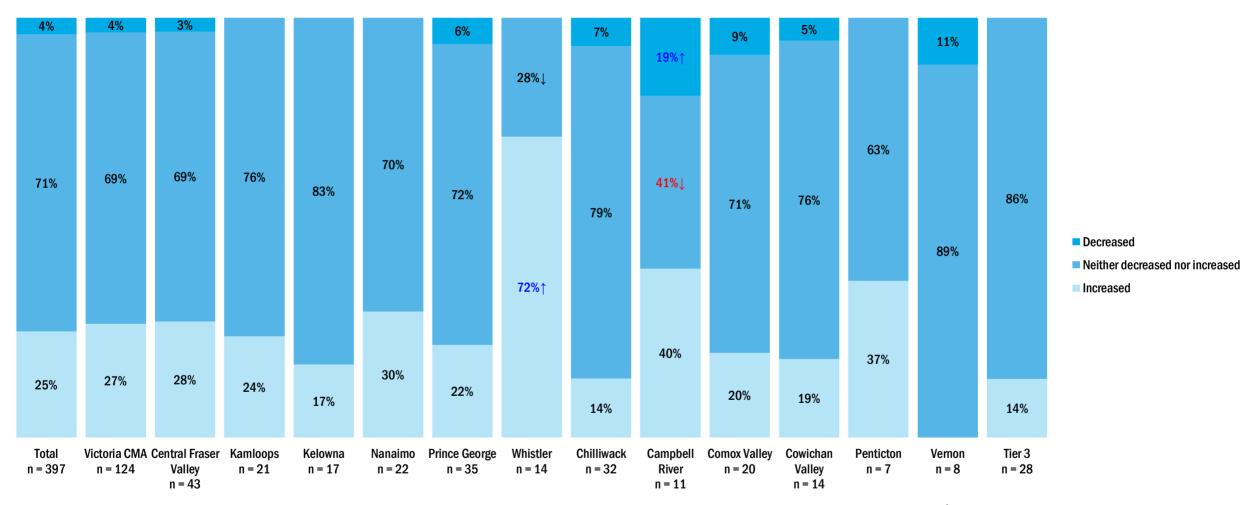


X3 How frequently does/do your child/children, 12 and under, ride the bus with or without you?

*Prefer not to answer is excluded from the graph but included in the percentage calculation

Impact of Free Transit on Transit Usage for Children 12 and Under

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

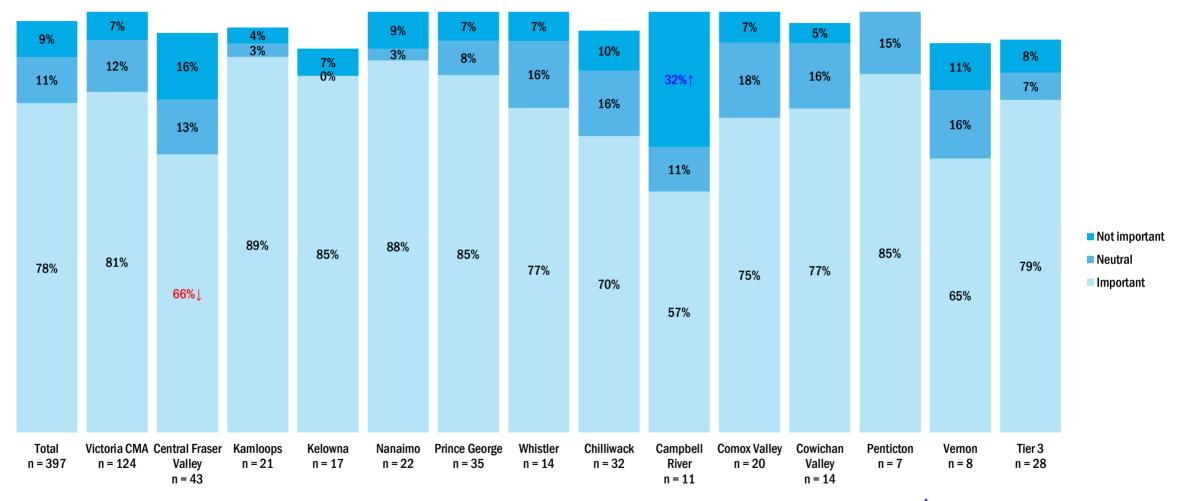
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X4 To what extent has the implementation of the Free Transit for Children 12 and Under program, impacted the frequency with which your child/children uses public transit?

Importance of Free Transit for Children 12 and Under

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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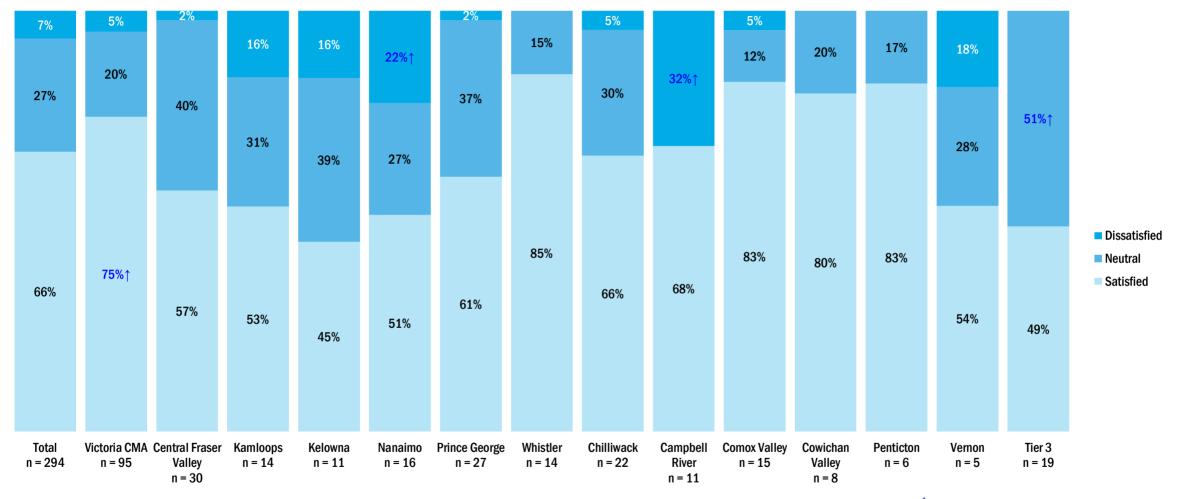


X5 How important do you think the Free Transit for Children 12 and Under program is to your community?

*Don't know is excluded from the graph but included in the percentage calculation

Satisfaction of Free Transit for Children 12 and Under

Current Reporting Quarter: Q2 2023 (APR - JUNE)



indicates significantly higher results compared to other regions;

indicates significantly lower results compared to other regions.

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X6 How satisfied were you with the service your child/children experienced while taking transit?

*Don't know is excluded from the graph

Demographics

Current Reporting Quarter: Q2 2023 (APR - JUNE)

Income	%	Age
Less than \$20,000	13%	19-24
\$20,000 - \$29,999	12%	25-34
		35-44
\$30,000 - \$39,999	10%	45-54
\$40,000 - \$49,999	8%	55-64
\$50,000 - \$59,999	9%	65 and older
		Prefer not to answer
\$60,000 - \$69,999	7%	
\$70,000 - \$99,999	16%	Gender
+10,000 +00,000	10/0	Male
\$100,000 - \$149,999	12%	Female
\$150,000 or more	6%	Other
Prefer not to answer	7%	Prefer not to answer

Age	%
19-24	12%
25-34	18%
35-44	17%
45-54	14%
55-64	17%
65 and older	21%
Prefer not to answer	0%
Gender	%
Male	43%

55%

1%

0%

Employment	%
Employed full time (30 hours or more per week)	41%
Employed part time (less than 30 hours per week)	17%
Unable to work	7%
Unemployed	7%
Stay at home parent	4%
Retired	23%
Prefer not to answer	2%

Schooling	%
Not currently a student	85%
Yes, High school student	1%
Yes, Full time postsecondary student	6%
Yes, Part time postsecondary student	3%
Yes, Student in vocational college	1%
Prefer not to answer	4%

Visible minority	%
Racialized minority	8%
Persons with disabilities (including physical and/or mental health disability)	22%
Indigenous (as defined in Canada as First Nations, Métis or Inuit)	8%
New to Canada (less than 1 year)	2%
LGBTQ2S+	8%
None of the above	58%
Prefer not to answer	4%

base n= 2032





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PivotalResearch is headquartered on the ancestral land of the Nêhiyawak (Cree), Anishinaabe (Saulteaux), Niitsitapi (Blackfoot), Métis, Dene and Iyãhé Nakoda (Nakoda Sioux) in Treaty 6 Territory and Métis Region 4.