

INFORMATION REPORT

TO:	Mayor and Members General Issues Committee
COMMITTEE DATE:	January 24, 2020
SUBJECT/REPORT NO:	(Re)envision the HSR Updates (PW20005) (City Wide)
WARD(S) AFFECTED:	City Wide
PREPARED BY:	Jay Adams (905) 546-2424 Ext. 6242
SUBMITTED BY:	Debbie Dalle Vedove Director, Transit Public Works Department
SIGNATURE:	

COUNCIL DIRECTION

N/A

INFORMATION

In 2019 (January-April), the Transit Division (HSR) conducted a comprehensive survey of its customers and Hamilton residents across the city (considered as potential new customers, from the perspective of transit ridership). The goal of the research was to measure our customers' perceived quality of transit service as it exists today in Hamilton, and to understand what current and potential customers desire from the service in the future. This information will enable us to focus our improvement efforts on the key drivers of customer satisfaction, and to look for new ways to increase our ridership to meet the objectives of our 10-Year Transit Strategy.

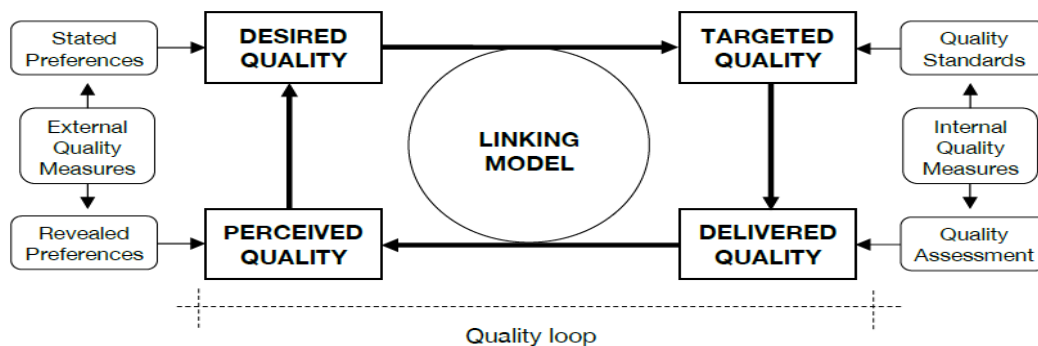


Figure 1: The Quality Loop Model

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The survey was administered and analysed by researchers within McMaster University's Department of Civil Engineering and the McMaster Institute for Transportation and Logistics (MITL). The Principle Investigator was Dr. Moataz Mohamed, Assistant Professor of Smart Systems and Transportation.

A comprehensive marketing campaign was undertaken to ensure broad awareness of the survey across all wards of the city. The response rate to the survey was tremendous, with 5,781 responses to the survey, which took on average 27 minutes to complete. This underscores a tremendous dedication on behalf of HSR customers and Hamilton residents to provide their feedback in support of the development of transit in their communities. Responses were statistically representative across various demographic profiles and locations in the city.

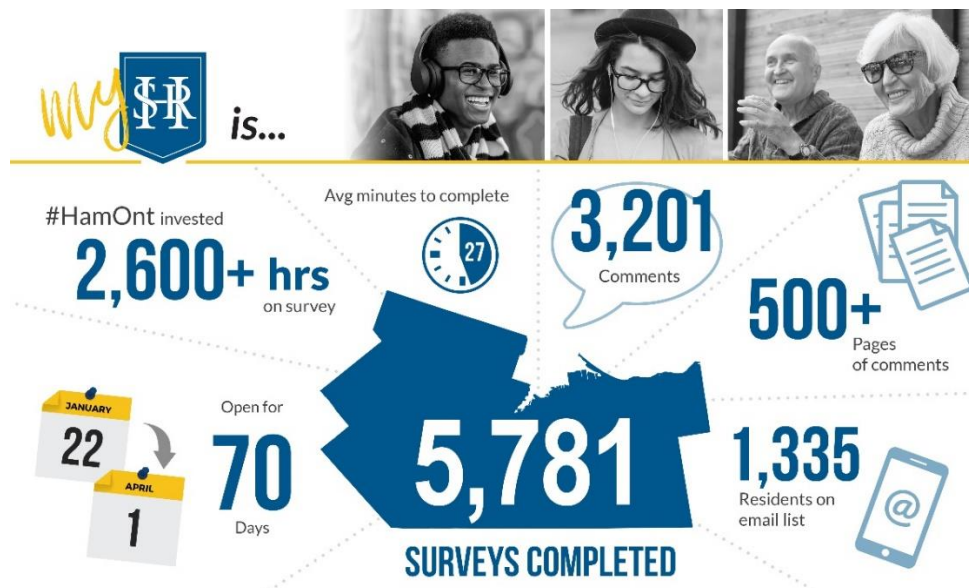


Figure 2: Response rate to survey.

The analysis of these survey results is now complete, with the following highlights being shared in this report as staff begin the next phases of the *(Re)envision the HSR* project. These phases include a robust analysis of the transit network's health and performance against our target service quality metrics. Staff will also be continuing public engagement activities across the city, to add further context to the survey results and to explore the beneficial and adverse impacts of proposed network reconfigurations for our customers.

This project will culminate in a further report and recommendations that would come forward to Council beginning in spring 2020. Approved recommendations would then become part of a workplan, with implementation of a potentially reconfigured network targeted for summer 2021. Where opportunities exist to implement improvements earlier, the Division would seek to fast-track those opportunities for the benefit of customers.

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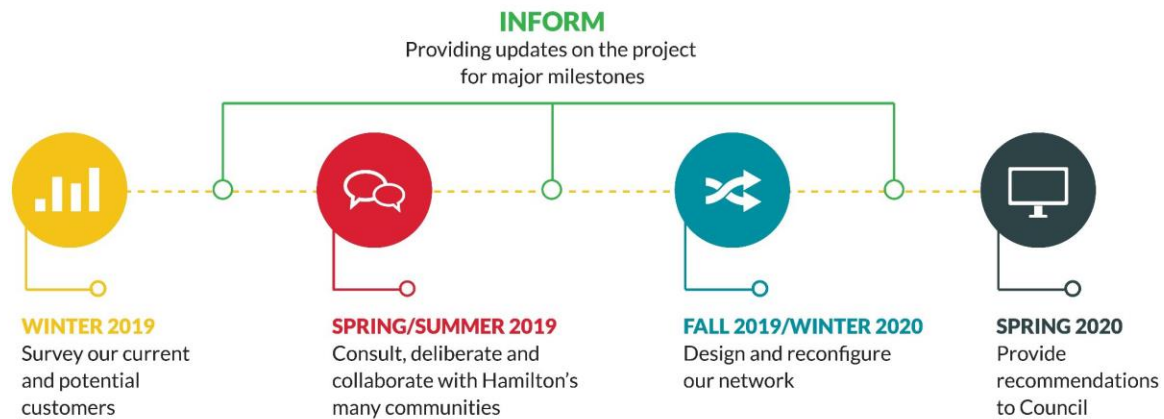


Figure 3: Project timeline

SURVEY METHODOLOGY

Participants in the survey were asked to provide information regarding:

- Socioeconomics and demographics
- Travel behaviour and mobility options (including their primary mode of travel and their frequency of travel on transit)
- Perceived and desired quality of HSR service:
 - by customers, related to perceived quality (e.g. satisfaction) of the criteria with respect to HSR service
 - by all survey respondents, related to the importance of the criteria in choosing transit as a mode of travel

Stated preferences:

- 'Unlabelled' choices were presented to compare various models of HSR service adjusting for variables such as fare price, time spent on bus, walking distance, transfers and provision of real-time info
- 'Labelled' choices were presented to compare HSR service to car and ride-share modes of travel, using the same variable factors
- Attitudinal and behavioural orientations

GENERAL SATISFACTION

The survey highlighted that overall satisfaction with the service is relatively high, but there is definite room for improvement. Approximately 56% of respondents reported positive levels of satisfaction (score = 7 to 10), while 26% of respondents reported neutral satisfaction (5 or 6) and 17% reported being relatively unsatisfied (1 to 4).

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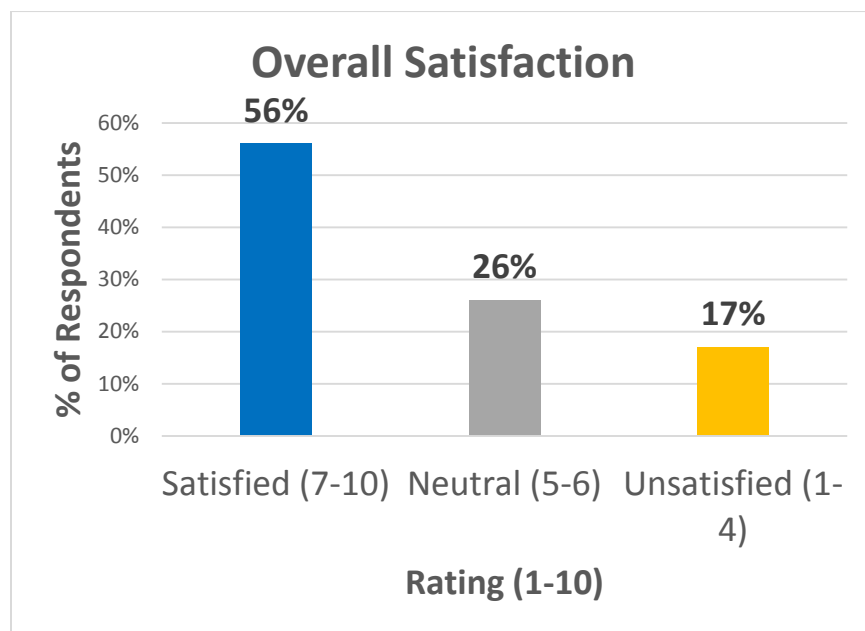


Figure 4: Results of overall satisfaction rating

DRIVERS OF SATISFACTION

In conducting the survey, the HSR had two related but distinct motivations:

1. Retain existing riders on transit by understanding what drivers of satisfaction are not currently meeting customers' expectations; and
2. Attract new ridership by understanding what would motivate potential customers to choose transit as one of their transportation choices in the future.

In order to understand the current customer experience, we need to determine what factors are most important to customers, and then measure how well we're performing against the desired quality that customers expect from the service. In order to understand what may motivate new customers to choose transit, we need to understand what is important to potential customers, and then work toward establishing and communicating those benefits within our service delivery model.

Factors that are performing well today, but which are not critical to driving satisfaction may be areas in which the HSR is sufficiently meeting expectations or possibly over-serving. Conversely, factors that are performing poorly today and that are critically important to making transit a preferred choice are areas where the service needs to focus to improve performance to retain and attract customers.

This relationship can be viewed within the following Importance / Performance Analysis (IPA) framework:

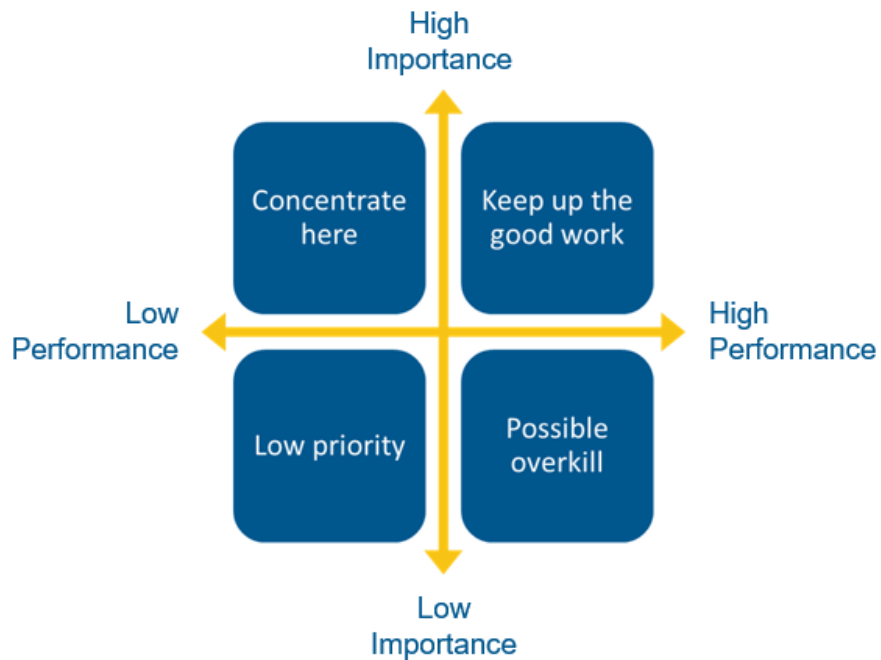


Figure 5: Importance / Performance Analysis (IPA) framework.

Applying this framework to the survey, current customers were asked to rate the level of performance (e.g. satisfaction) with 29 factors shown to impact perceived quality of transit service, based on studies done in other jurisdictions. Additionally, all survey participants were asked to rate the level of importance of 30 factors shown to motivate choice of transit over other transportation modes.

Plotting these factors on the IPA framework, the dominant drivers of customer dissatisfaction with HSR service includes:

- Service reliability
- Weather protection at bus stops
- Waiting times at transfer / connection points
- Frequency of service on weekends and holidays
- Bus crowdedness
- (Cleanliness of bus stops and comfort amenities at stops / shelters were on the borderline)

These are all areas of critical importance to evaluate for improvements as part of the (Re)envision project, if we're to achieve positive ridership growth.

Current customers were also asked to rate their satisfaction with the routes they commonly ride. Shorter and more local routes typically were rated with higher levels of satisfaction. The five routes with the highest levels of dissatisfaction all run on the

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mountain and travel longer distances. Route #44 had the highest level of dissatisfaction, followed (in order) by routes #41, #20, #27 and #43.

WILLINGNESS TO PAY (WTP)

An additional focus of the survey was to research which quality assessment and choice statistical models are most appropriate to predict future ridership strength for the HSR. These models focus on a “willingness to pay” context, that assesses the relative value that a person associates with a specific factor of service (e.g. frequency, total trip time, walking time, etc.), by measuring that factor against fare price as a baseline. Using this approach, it is possible to associate the impact of adjusting various attributes, by quantifying a correlated monetary cost in the form of a fare increase or decrease, that would be tolerated by customers if that attribute were adjusted.

The results of this aspect of the research will enable the division to improve ridership prediction estimates based on the evolving factors of service delivery over time. They will also enable better identification of market segments more likely to be motivated to choose transit as a form of transportation, in order to focus our efforts on increasing ridership.

Regarding these choice scenarios (choosing between different transit options), the general model shows that:

- Hamiltonians in general prefer shorter journey and walking times, lower fares, and higher service frequencies (i.e. shorter headways);
- Hamiltonians appreciate on-board real-time information more than at-stop real-time information, and both are more preferred to no real-time provision at all; and
- Hamiltonians express a high preference for direct trips (i.e. zero transfers) over multiple transfer trips.

ATTITUDINAL AND BEHAVIOURAL ORIENTATIONS

The survey assessed respondents’ perspectives related to pro- and anti-transit attitudes, perceived behavioural control, social norms, car-reliance, ride-hailing preferences and behavioural intentions.

These assessments have a significant bearing on the way residents choose to travel and are considered key influential factors for transportation mode choice. The results indicate a good perception associated with using transit from respondents. Transit is not perceived as “old fashioned,” nor do respondents believe transit is only for those who are less fortunate. Most notably, there is a willingness to use transit for current and potential customers if the service is significantly improved. That said, there is a predominant car-reliant attitude indicated in the results as well.

Together, these indicators would demonstrate meaningful positive attitudes toward transit adoption that are conditional on service quality improvements. They would also emphasize the importance of a targeted focus on market segments who are more likely to consider transit as a transportation mode, versus attempting a one-size-fits-all approach to marketing transit to all Hamilton residents.

Further information on the methodology and customer insights gathered from the survey are summarized in Appendix “A” to Report PW20005.

ONGOING PUBLIC CONSULTATION ACTIVITIES

The survey results provided a network-wide perspective from customers and non-customers. As the HSR continues its consultation activities, our goal is shifting to understanding more localized impacts of transit service within neighbourhoods, business areas, employers and institutions. This phase of consultation will include visiting areas of the city that currently have limited or no transit service today, to understand what needs may be emerging for future requirements and growth opportunities.

Staff are presently building relationships with many stakeholders across the city, including:

- School boards
- Post-secondary educational institutions
- Hospitals
- Social service providers and networks
- Business improvement areas (BIAs), business parks and chambers of commerce
- Major employers
- Hamilton International Airport
- Hamilton Port Authority
- Organizations working for the environment and sustainability

In some areas of the city, there are limited public spaces available, to support this outreach and engagement. Staff have undertaken two major initiatives to support improving our capacity to meet and engage with as many residents as possible.

- 1) The (Re)envision team has been working with the Chief Digital Officer and Manager of Community Initiatives to introduce a new digital engagement platform for the (Re)envision project, that will support a modern and innovative way to engage customers and Hamilton’s residents.

This new digital tool will help staff gather deeper knowledge and insights from HSR customers about their experiences and ideas. It will also help inform future corporate public engagement strategies and efforts. The HSR is excited to be the first City Division to explore use this new tool which can be accessed at hamilton.ca/myhsr.

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On this website, interested residents can:

- Share ideas, take part in mapping exercises, and discuss HSR's routes and service.
- Find out when the (Re)envision team will be in their community.
- Learn about upcoming HSR projects and announcements.
- Sign-up to receive newsletter updates about the (Re)envision project.
- Connect with the (Re)envision Team for questions and answers about our plans to reconfigure the network.

- 2) As we continue to grow ridership, connecting with Hamilton residents in their own communities is crucial. One of the recommendations in the City of Hamilton's Public Engagement Policy, made by the Hamilton Engagement Committee and endorsed by Council in April 2015, was the creation of a mobile 'one stop' engagement bus.

To support such an innovation, the HSR is taking our public engagement activities on the road. The (Re)envision team will be travelling across all wards throughout the city on our new consultation bus, to meet with residents to find out what we could do to make transit their first choice in transportation.

Quick facts about the consultation bus:

- A retired HSR bus (from 2004) has been given a second life, allowing for a return on investment beyond its expected 12-year lifespan.
- Rechargeable battery cells and solar panels enable the bus to operate as a mobile board room without the ignition running, minimizing our carbon footprint.
- In-house staff completed the majority of the work, with HSR Maintenance staff doing body repairs, revitalization and interior design / construction.
- The refurbishments are expected to enable up to 5 years of additional usage for the consultation bus. (The bus will be used solely for public events and will not run in service.)
- Enthusiastic students from Mohawk College's Architectural Design program helped to design the interior layout using high-tech 3D scanners. The students focused on ensuring accessibility, adaptability and functionality – and they received course credit for their work on the bus.
- On-board touch screen displays enable participants to explore the HSR's website, route design tools, trip planners and the HSR's digital engagement space.
- The consultation bus is outfitted with features like Wi-Fi and colour destination signs, giving HSR staff the ability to test new features and technology, for future possible use in-service.
- The bus is wrapped with an attractive and inviting design, creating a mobile billboard that promotes in-person and digital engagement opportunities.

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- Security features have been installed to protect the on-board equipment from theft and unauthorized access.
- Future enhancements may be added, to increase the quality of the experience that the community can have while engaging with the HSR and the City on important initiatives.
- The bus tour details will be listed on the (Re)envision engagement website, hamilton.ca/myhsr.



Figure 6: Consultation Bus at the Our Future Hamilton event on November 4, 2019.

APPENDICES AND SCHEDULES ATTACHED

Appendix “A” to Report PW20005 – Service Quality and Consumers’ Preferences for Hamilton Street Railway (HSR) Executive Summary