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The Regional Municipality of Durham Report

To:	Durham Region Transit Executive Committee
From:	General Manager, Durham Region Transit
Report:	#2025-DRT-08
Date:	June 4, 2025

Subject:

Customer Satisfaction Survey

Recommendation:

That the Transit Executive Committee recommends

That this report be received for information.

Report:

1. Purpose

1.1 The purpose of this report is to provide details on the Durham Region Transit (DRT) 2025 Customer Satisfaction (CSAT) survey, conducted from December 2024 through March 2025.

2. Background

2.1 Customer satisfaction survey's benefit the organization and it's customers. Including the following.

a. Identify areas of dissatisfaction and lead to proactive solutions
b. Improve services based on insights into customer needs, preference, and concerns,
c. Identify areas where innovation or upgrades are needed
d. Demonstrate to customers that their opinions matter and build trust
e. Continuously align with customer expectations based on satisfaction trends
f. Measure organizational progress and performance for the issues most meaningful to customers.

2.2 In 2024 HarrisX was awarded a contract to conduct qualitative and quantitative analysis of customer satisfaction related to DRT's delivery of scheduled and On Demand services.

2.3 The outcomes from this survey will inform DRT's 2026 business plans and budget.

3. Qualitative Insights

3.1 One-on-one detailed interviews (45 minutes each) were conducted with current (15 interviews) and potential (10 interviews) DRT users living or working in Durham Region. The survey sample included a mix of ages, cities, household types, transit usage, travel purposes, ethnicities, and accessibility needs, with current users including both scheduled and On Demand services. The purpose of this phase was to understand, at a high-level, customer perceptions of DRT, their motivations/barriers to taking transit, as well as what the end-to-end travel journey in the region typically looks like.

3.2 These current and potential customers openly shared their thoughts, such as the following.

a. The transit system is seen as efficient, clean, safe and user friendly.

b. A few notable barriers were highlighted by users.
- Lack of baggage storage
- Lack of and more timely communication about service delays
- Need for more consistent weekend service
- Overcrowding at busy times
- Need better coverage in residential areas

c. While most users are generally content with the service they receive, many express concern that Durham Region Transit won't keep up with the growing transit needs of the Region.

d. As the population of Durham grows, and geography expands, users expect DRT to expand their infrastructure and services accordingly – particularly in terms of frequencies, expanded service, and greater route options.

e. On Demand user findings:
- Booking is seen as easy and user friendly.
- The first step is to call to book; during this call, they may be directed to the app to make a 'booking'.
- Pick-up times are accurate – the service comes when it says it is going to come.
- The price feels fair for the service that is offered.

3.3 Highlights of the qualitative findings from non-users are summarized below.

a. Non-Users tend to be extremely habitual, with transit options securing little, if any, conscious consideration. “I just get into my car – I don’t even give it a second thought.”

b. Many currently avoid the DRT because it is an unknown experience and they are intimidated by the learning curve related to routes and stops. Taking DRT feels daunting to non-users. “I don’t even know where I would get it or how I’d get to where I need to go.”

c. These concerns are likely grounded in a few key causes:

- Influential effect from other transit systems influence non-users perceptions that DRT is unclean, crowded, and dangerous. (e.g., travellers hear in the media that other transit systems can be unsafe and assume DRT is the same.)
- Many are unsure as to how they would learn to use the system. There is extremely limited awareness of the Transit app and other resources that Durham Region transit offers.
- “Important” trip occasions, such as the commute to work or school, has a little room for error and lateness. As such, it is currently seen as risky to DRT for commuting purposes.

d. On Demand non-users findings:

- There is very limited awareness about the service. Few know it exists.
- Many have misinformed assumptions about the service. For example, some think it is just for senior citizens or those with severe accessibility challenges.

3.4 The qualitative survey clarified the main reasons people are using DRT services, or in other words the purpose of their transit trips. Below are the types of trips used by customers, from most to least frequent.

- Work or School, daily activity
- Errands (e.g. grocery store), 1-3 times per week
- Activities (e.g. gym or kids activities like soccer or playdate), weekly occurrence
- Appointments, weekly or bi-weekly and occasionally impromptu
- Social – visiting family and friends, typically bi-weekly occurrence
- Entertainment (e.g. concerns, sports games, bar nights), bi-weekly or monthly occurrence and more likely in warmer months

4. Quantitative Results

4.1 The quantitative survey included a 12-minute online survey, made up of 46 questions. The total number of online surveys completed was 788 across several platforms. To qualify to complete the survey, respondents had to be 16 years of

age or older, live, work, and/or go to school in Durham Region, and be someone who would consider using DRT, even if they do not currently use DRT services.

4.2 The overall sample composition was weighted to reflect normalized proportion of DRT and non-DRT riders. Due to the nature of survey recruitment, without weighting, the results would have reflected a high percentage of DRT users, resulting in inaccurate overall findings.

4.3 Overall satisfaction is modestly strong but trails other public transit agencies. While 70 per cent of those who used DRT for their most recent trip were satisfied with their experience, satisfaction levels trailed both GO and TTC, particularly in the group responding that they are extremely satisfied with their experiences. Given the amount of cross-transit usage in the region, many customers benchmark their service expectations to other transit options.

4.4 When focusing on the specific elements of the journey, satisfaction is strong. Riders are most satisfied with three key elements.

a. Safety of the ride.
b. Boarding/getting off the bus.
c. Comfort of the ride.

4.5 The top three factors rated by riders as below average satisfaction/performance and but of high level of importances, including the following.

a. On-Time Performance.
b. Wait times.
c. Real-time communication.

These are already three of DRT's top operational priorities.

5. Focus areas for action based on survey outcomes

Real Time Communication

5.1 Enhance real-time communications to customers. Customers want to be informed when service changes or experiences delays, allowing them to make informed decisions. This includes information communicated through social media, web, and potentially platforms information displays.

5.2 By Spring 2026, Transit Control will be enhanced to included staff resources dedicated to communicating real-time information to customers, through a variety of media, the DRT website, social media, and the Transit app.

5.3 DRT is also pursuing innovative information displays for terminals and stations, and seeking to collaborate with Metrolinx to provide real-time information at GO Stations.

Public Awareness of DRT Services

5.4 Only one-third of people surveyed indicated that they had used DRT in the past year. However, 63 per cent of people who did use DRT within the past year indicated they would consider it again, which indicates an opportunity among occasional users.

5.5 To attract this group of riders with greater frequency, DRT will evaluate opportunities to enhance marketing activities and public awareness campaigns, with a focus on DRT's services as convenient, safe and easy to access for various trip purposes.

5.6 As previously reported, the primary contributors to increasing ridership and the transit modal share are convenient access, and frequent and reliable services. Continued investments will expand the DRT network, improve on-time performance and reliability while operating in increasingly congested traffic condition, and bring service stops closer to residents and businesses.

6. Relationship to Strategic Plan

6.1 This report aligns with/addresses the following Strategic Direction(s) and Pathway(s) in Durham Region's 2025-2035 Strategic Plan:

a. Connected and Vibrant Communities

- C1. Align Regional infrastructure and asset management with projected growth, climate impacts, and community needs.
- C3. Improve public transit system connectivity, reliability, and competitiveness.
- C4. Improve road safety, including the expansion and connection of active transportation networks to enhance the range of safe mobility options.
- C5. Improve digital connectivity and multi-channel access to information, resources, and service navigation.

b. Healthy People, Caring Communities

- H5. Provide services for seniors and work with community partners to support aging in place.

c. Resilient Local Economies

- R2. Support the growth of new business startups and small to medium local businesses.
- R3. Develop, attract, and support a skilled and qualified workforce, including youth and newcomers.

6.2 This report aligns with/addresses the following Foundation(s) in Durham Region's 2025-2035 Strategic Plan:

a. People: Making the Region of Durham a great place to work, attracting, and retaining talent.
b. Processes: Continuously improving processes to ensure we are responsive to community needs.
c. Technology: Keeping pace with technological change to ensure efficient and effective service delivery.

7. Conclusion

7.1 The recent customer satisfaction survey demonstrated a strong satisfaction level with customers. Opportunities to improve customer satisfaction can be realized by focussing on factors important to them and residents considering public transit. It is critical to continuously improve customer satisfaction, with long-term impacts including increased ridership, public support for more funding, and transforming mobility across the Region through advanced transit projects and infrastructure.

7.2 Through continued investment in service hours for growth, reliability and real-time customer information, DRT will be able to better respond to customer expectations, as well as attract new customers to a clean, efficient and easy-to-use transit service into the future.

7.3 An annual Customer Satisfaction scorecard will be produced in advance of the next survey, to track progress on several key factors of customer satisfaction.

8. Attachments

Attachment #1: DRT Qualitative Findings

Attachment #2: DRT Quantitative Findings

Prepared by: Anthony Pezzetti, Deputy General Manager Operations, DRT, at 289-927-1660.

Respectfully submitted,

Original Signed by

Bill Holmes
General Manager, DRT

Recommended for Presentation to Committee

Original Signed by

Elaine C. Baxter-Trahair
Chief Administrative Officer

ATTACHMENT # 1

January 2025

Durham Region Transit

Customer Satisfaction, Customer Experience, and Non-User Understanding

Qualitative Findings

Table of Contents

- Research Objectives and Methodology
- Executive Summary of Key Findings
- General Travel Behaviour
- Durham Region Transit Perceptions, Barriers and Entry Points
- Customer Journey Experience

RESEARCH METHODOLOGY AND OBJECTIVES

Research Objectives and Methodology

Objectives

To build a framework that outlines the key milestones along the transportation journey within the region:

- To explore in detail a recent journey that each particular traveler has taken and determine why they did the things they did/made the choices they did along the way.
- Among current customers: provide initial direction as to what aspects of the DRT journey are working well and what could be improved
- Among non-customers: better understand familiarity with the service and barriers to current consideration and usage, and potential changes to increase consideration

Methodology

One-on-one in-depth interviews among current DRT customers and prospective customers.

- 45 minutes each
- 15 among current DRT users (inclusive of those who have used specialized and on-demand service)
- 10 among non-DRT users (non-rejectors of DRT)
- Must live and/or work in Durham Region
- Mix by city, age, HH composition, frequency of usage of different transit modes, ethnicity, purpose of travel, accessibility needs, etc.

The findings from this qualitative phase will be the foundation for initial hypotheses related to the Durham transit journey and to build a quantitative instrument to size & validate these findings, particularly key inflection points along the journey

Executive Summary: Key Findings

Executive Summary of Key Findings: Users

Among Users

- Durham Region Transit is positively regarded by its users.
  - The transit system is seen as efficient, clean, safe, and user friendly.
- Users identify a few notable barriers to the transit system that present an opportunity for DRT to improve their service. These include:
  - Baggage storage
  - Increased and more timely communications about delays
  - More consistent weekend service
  - Reducing overcrowding at busy times
  - Better coverage in residential areas
- While most users are generally content with the service they receive, many express concern that Durham Region Transit won't keep up with the growing needs of the area.
  - As the population of Durham grows, and geography expands, users want the DRT to expand their infrastructure accordingly – particularly in terms of frequencies, more buses and greater route options.

Executive Summary of Key Findings: Non-Users

Among Non - Users

- Non-Users tend to be extremely habitual, with transit options securing little, if any, conscious consideration. *"I just get into my car – I don't even give it a second thought."*
- Many currently avoid the DRT because it is an unknown experience and are intimidated by the learning curve related to routes and stops. Taking the DRT feels daunting to non-users. *"I don't even know where I would get it or how I'd get to where I need to go. I guess I would Google it?"*
- This concern is grounded in a few key causes:
  - Halo effect from other transit systems makes non-users assume that the DRT is unclean, crowded, and dangerous. (E.g., Travelers hear/have experienced that the TTC can be unsafe and assume the DRT is the same.)
  - Many are unsure as to how they would learn to use the system. There is extremely limited awareness of the Transit app and other resources that Durham Region transit offers. ***Increasing awareness of these resources could help mitigate this sense of uncertainty.***
  - "Important" trip occasions, such as the commute to work or school, has a little room for error and lateness. As such, it is currently seen as risky to DRT for commuting purposes. ***Rather, many are open to trying DRT for a "destination" trip – such as to a mall – where they do not have to worry about being on time.***

Executive Summary of Key Findings

More Frequent Occurrence

Less Frequent Occurrence

Travel Occasions	Transit mode used Most Often	
	Users	Non-Users
Work		
School		
Shopping (Groceries, household goods, pharmacy, general errands etc.)	**Bus to, Ride Share from*	
Activities (The gym, yoga class, soccer practice, etc.)		
Appointments (Doctors, dentist, nail salon, hair salon, etc.)		
Social (Visiting friends and family, going out for dinner)		
Entertainment (Sports games, the movies, concerts.)		

When considering how to travel to a destination, travellers experience a tension between productivity, responsibility, and control

- Some travellers prefer to take a more hands-on approach to their journey.
  - They value the flexibility and freedom that being in-control offers them – such as in a personal car or an Uber
- On the other side, some enjoy their journey more when they defer the responsibility to another individual
  - Those who are anxious drivers, have been in car accidents, or just generally don't enjoy driving, appreciate deferring the responsibility of their commute onto another such as a bus driver or an Uber driver.
  - This also allows them more time to be productive. They can multi-task on their journey and finish work or homework.

a) Hands-Off Transportation

- Passive role/responsibility.
- Responsibility (timing, route, manoeuvring traffic, etc.) are in in another's hands.
- The traveller does not take an active role in their journey.

b) Hands-On Transportation

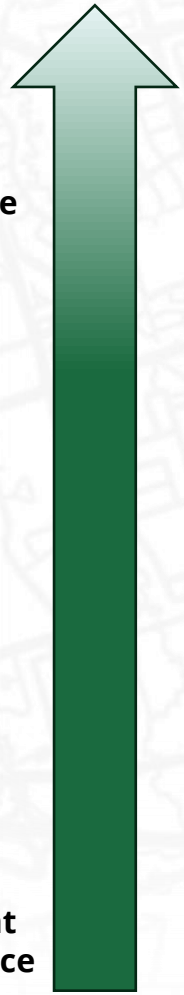
- Active role/responsibility.
- Traveler feels they are fully responsible for entire journey (even when many circumstances – such as traffic and availability of parking – are outside of their control)

General Travel Behaviour

Travelers have mixed reviews on travel within Durham region

- Some feel as though they can conveniently travel from point A to point B while others feel the opposite.
- All agree that Durham Region is expanding both in population size and geographic boundary which is likely to negatively impact the ability to navigate the region (more traffic, congestion, etc.).
- Given the proximity to the city, most think about traveling within Durham in relation to traveling in Toronto. This is a positive comparison that elicits contrasting thoughts such as “Less-crowded” and “less-interruptions”.

Top trip occasions/triggers for regional travel are work & errands



Work or School
Frequency: *Daily activity*
Group size: *Solo*

Errands (e.g. grocery store)
Frequency: *Typically occurs 1-3 times/week*
Group size: *1-2 people*

Activities (such as the gym, or kid's activities like soccer or a playdate)
Frequency: *Weekly occurrence*
Group size: *1-2 people*

Appointments
Frequency: *Reoccurs weekly/bi-weekly, occasionally impromptu*
Group size: *Solo*

Social - Visiting family and friends
Frequency: *Typically occurs bi-weekly*
Group size: *2-3+*

Entertainment (concerts, sports games, bar nights)
Frequency: *Bi-weekly to monthly. There is also a seasonal element with this occurring more in the warmer months*
Group size: *2+ (Potential for large group travel)*

A complete list of most-recent trips

*"Yesterday, I got a ride to **school**."*

*"Today I left to go to my **volunteer** job."*

*"I left my house this morning at 6am to go to **a catering job**."*

*"I took my son to a **soccer game**."*

*"I met friends for a **drink after work**."*

*"I took my **kid to his dad's house** for the week."*

*"My partner and I went to go **visit a friend** in Bowmanville."*

*"I went to **the LCBO** to grab a bottle of wine."*

*"**Pickering Town Centre** to do some Christmas shopping."*

*"I went from **Scarborough Town Centre to Pickering Town Centre** to do some Christmas shopping."*

*"I went took the bus to **work**."*

*"I booked the on-demand to go to **Pickering Town Centre**."*

*"To **school** for my final exam."*

*"To go to my **parents house**."*

*"**The mall** with friends."*

*"To run an **afterschool program** at an elementary school."*

*"Took the bus to the **Go-Station** to go downtown."*

*"To **work**."*

*"Took the bus to the **Go-Station** to go downtown."*

*"Today for **work**."*

*"This morning for **work**."*

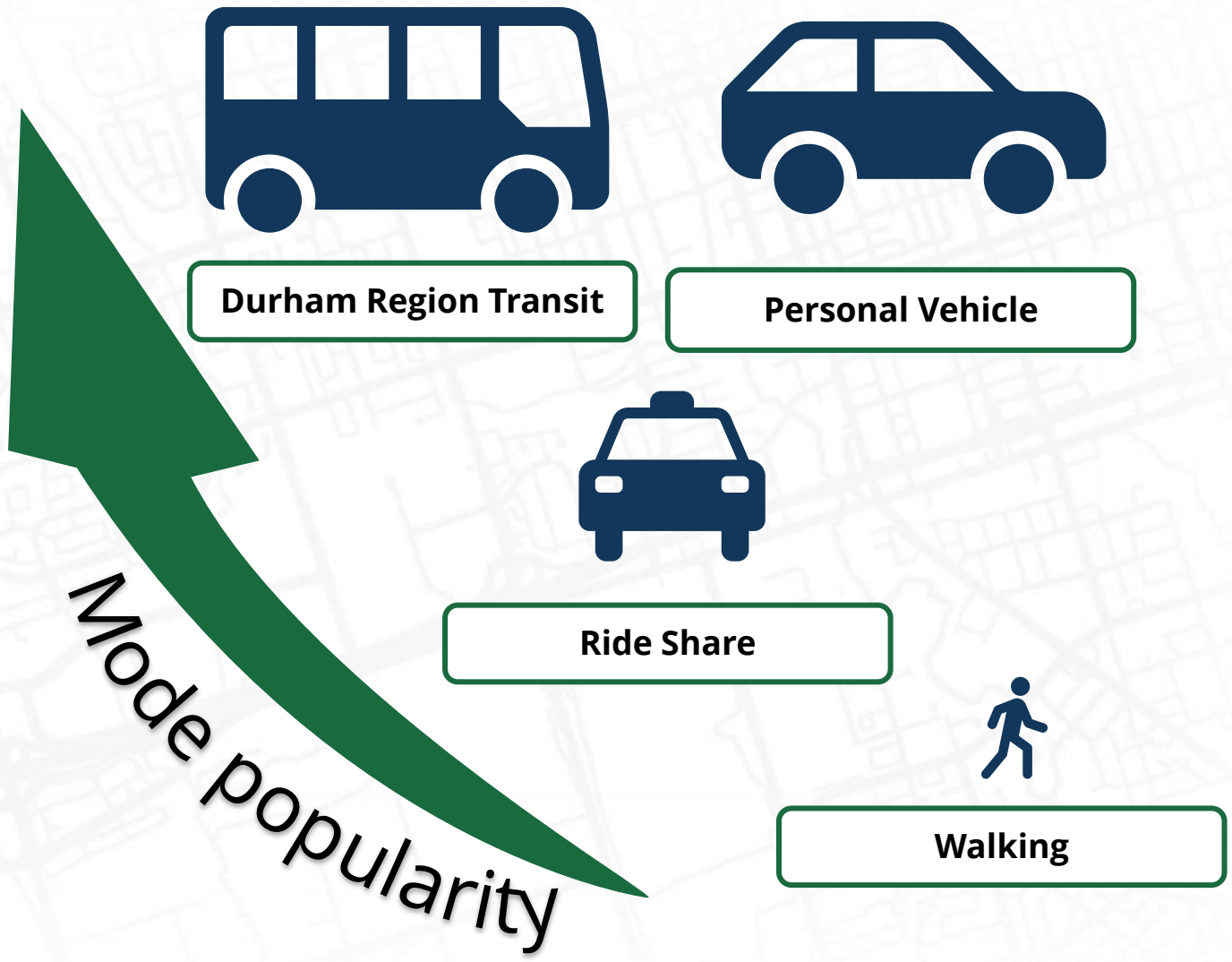
*"I went to the store for some **groceries**."*

*"I had an evening shift at **work**."*

*"I Was going to **school**."*

*"Yesterday and I went to **work**."*

The main modes of transportation within Durham Region are:



*Biking was not done by these respondents

Travelers choose mode via a combination of **circumstance** and **preference**

Circumstances (in descending order of importance):

- Budget
- # of stops
- Safety – *road conditions, time of day, stranger danger, etc.*
- Weather
- Vehicle availability
- Timing – *will there be traffic?*
- # of travellers in groups

Preference:

- *Hands-on* travel experience
- *Hands-off* travel experience
- **The perception of control plays a large role in why travellers select one mode over another with car seen as providing the greatest sense of control (can leave when they want, can stop where and when they want)**

> *"I don't have car access right now, so I always take the bus."*
>
> ***- DRT User***

> *"If there is good weather, I am happy to take the public transit."*
>
> ***- DRT User***

> *"I like being in control of my commute and having the flexibility to leave whenever I would like."*
>
> ***- DRT Non-User***

The number of stops needed to complete a journey is a top consideration/driver of choice for travellers…

- The bus feels less desirable when riders need to make 2 or more stops.
  - Having to make multiple stops feels time consuming to riders.
  - While the bus may take time to get from Point A to Point B, adding a Point C or even D increases the time spent in travel – particularly waiting for the next bus.
  - In addition, many of the bus routes are not direct, so that adds time to the journey.
  - Meanwhile, a car is seen as much more direct, reducing overall travel time (particularly when taking into account the waiting time).
- For individuals with a car, when they know they have to make multiple stops most won't even investigate the DRT as an option – particularly if it is not a solo trip (e.g., many trips include "tacking on" running a few errands before or after dropping a child off at school).
- For individuals without a car at home, many will take the DRT for one or two of the stops but take an Uber home or ask to borrow a car from a friend or family member if there are more stops required.

> *"If I am running errands and have multiple stops, I will sometimes take the bus to the first location but then take an uber home or in-between."*
>
> ***- DRT User***

> *"If I have to make multiple stops, I'm probably going to borrow a car because it's just such a headache."*
>
> ***- DRT User***

> *"The car just works so well for shopping at different stores. I just did my Christmas shopping, and I can't imagine doing that on the bus."*
>
> ***- DRT Non-User***

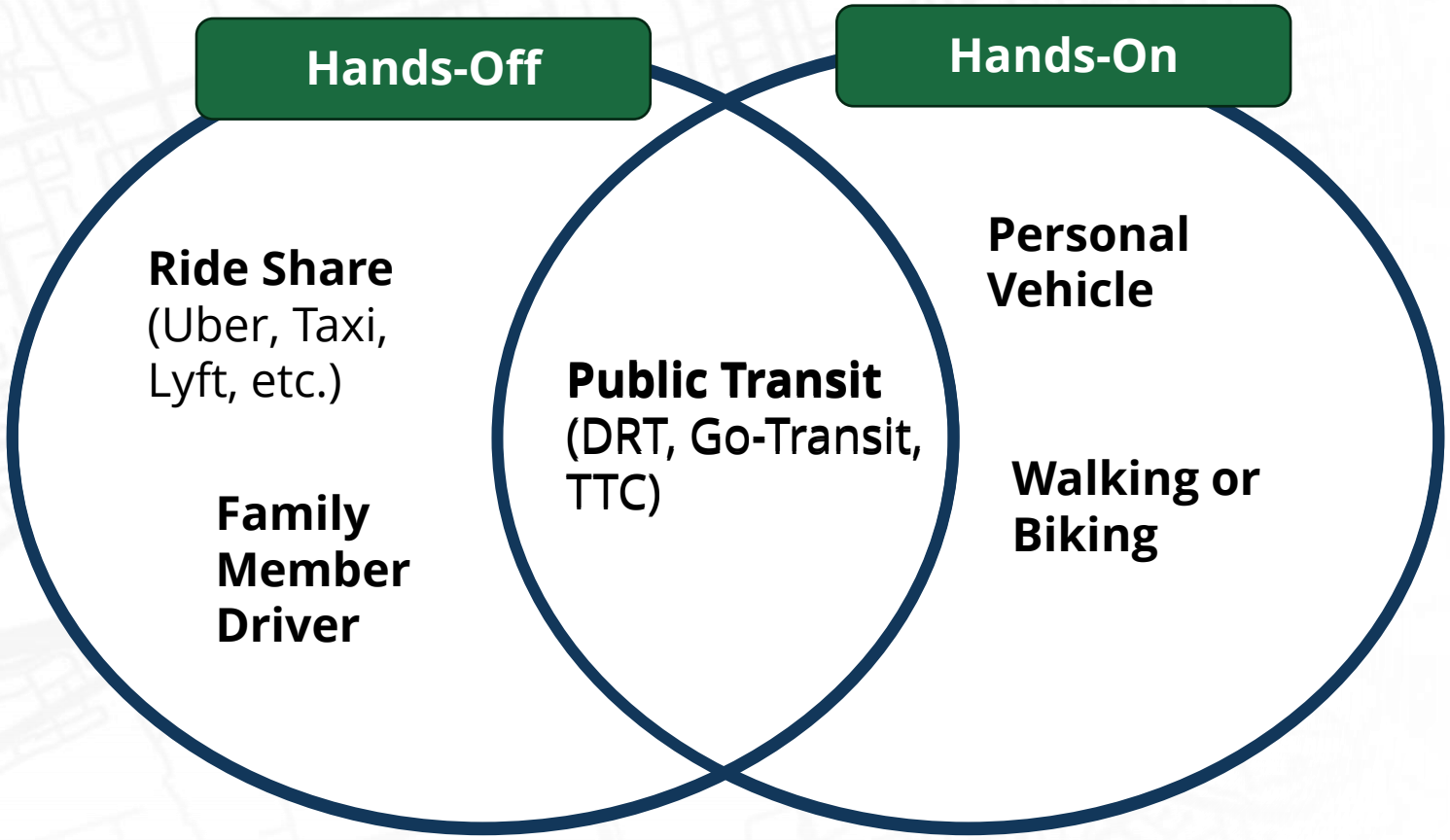
Commuting falls into two main categories:

a) Hands-Off Transportation

- Passive role/responsibility.
- Responsibility (timing, route, manoeuvring traffic, etc.) are in in another's hands.
- The traveler does not take an active role in their journey.

b) Hands-On Transportation

- Active role/responsibility.
- Traveler feels they are fully responsible for entire journey (even when many circumstances – such as traffic and availability of parking – are outside of their control)



It is usually personal decision whether Travelers prefer to take a passive or active role in their journey…

a) Hands-Off Transportation

- Passive role/responsibility.
- Responsibility (timing, route, manoeuvring traffic, etc.) are in in another's hands.
- The traveller does not take an active role in their journey.

- Deferring the control of their journey to another (such as a bus driver) relieves stress.
- These individuals prefer to entrust their travel with another individual.
- They also enjoy the spare time this allows them – by not driving, they can spend their time reading, sleeping, finishing work/homework – extending their productivity.

b) Hands-On Transportation

- Active role/responsibility.
- Traveler feels they are fully responsible for entire journey (even when many circumstances – such as traffic and availability of parking – are outside of their control)

- For others, they find their journey less stressful when they take a more active role in getting there.
- These individuals prioritize flexibility and feeling in-control. This is more important than productivity.

Durham Region Transit use-cases:

Commonly Used By individuals...

- Who grew up in the region and learned the system at a young age
- Without consistent car access
- Trying to save money
- Who are anxious drivers
- Without reliable/affordable parking
- Like a hands-free journey

Ideal Conditions For Ridership

- Daytime
- Expected/routine trip (i.e. ample time to prepare)
- Temperate weather
- Light/limited baggage
- Access & egress points on a main bus route

Likely to be used for...

- Regular daily trips such as work, school, and activities like going to the gym
- Transit to the GO Station
- Travel to the mall/a specific destination
- Group travel with friends or family or with children when the destination/trip is designed to feel like an “adventure”

Less likely to be used for...

- Long distance travel throughout the region (more than 30 minutes)
- Late night travel
- Grocery store
- Group travel with small kids – particularly those who “take a long time to get ready” (too rushed/likely to miss bus)
- Access/egress off main routes

Personal Car use-cases:

Commonly Used By individuals...

- Who have consistent access to a car (personally own a vehicle, can regularly borrow one from a family member, or has a friend who has a car and is willing to drive them)
- Who are not confident using the public transit system
- Prefer a private experience
- Have accessible and affordable parking
- Make multiple stops

Ideal Conditions For Ridership

- Low traffic times. E.g. Middle of the day
- Ability to avoid busy roads during rush hour (e.g., 401, Highway 2)
- Safe driving weather
- Need to make multiple stops

Likely to be used for...

- Work/school commutes
- Grocery shopping
- Errands (which require multiple stops)
- Taking children to activities around
- A trip to a “far” city in Durham (30+ minutes away)
- Driving to the GO station

Less likely to be used for...

- School commutes made by a teenager (unless a parent is driving)
- Travel to downtown GTA (GO Train strongly preferred to avoid traffic and parking)

Ride Share use-cases:

Commonly Used By individuals...

- Who don't have consistent access to a car (i.e. they don't have a car, or another family member needs the car)
- Who need a back-up method of transportation
- Like/need a hands-free journey
- That have accessibility concerns or needs
- Who have lots/heavy baggage
- Who have the budget flexibility

Ideal Conditions For Ridership

- Late-night rides
- Car is broken down or bus has delays and needs to be at a specific destination at a specific time
- Bad weather (i.e. don't want to wait for the bus)

Likely to be used for...

- Late nights with friends – getting home safely
- Transporting heavy items
- Bad weather (rain, wind, snow, etc.)
- As a back-up when there are delays
- First-last mile solution when taking public transit

Less likely to be used for...

- A primary option for daily/weekly trips (e.g. work)
- Longer trips (seen as too expensive)

Walking use-cases:

Commonly Used By individuals…

- Who enjoy fresh air
- Who enjoy time with family and friends outdoors
- Who have leisure time

Ideal Conditions For Usage…

- Temperate weather
- Warmer months
- Short trips

Likely to be used for…	• An activity in and of itself (exercise, being social) • When a destination is very close by
Less likely to be used for…	• A main method of transportation • Any destination that is longer than a 10-minute walk • A destination that is along a busy road/not safe for pedestrians (e.g., no sidewalks)

Google maps is the top information source when planning a journey within the region

Format: App if on-the-go, sometimes web-browser

Usage: Exploring the quickest route by car. Some use it to explore which alternative method of transportation is fastest. The first "go to" source among those not familiar with DRT routes if they wanted to use the service

Format: App and DRT Website Route Planner

Usage: Exploring point A to point B on DRT and other transit systems

Format: App

Usage: Quickest driving route information + delays + traffic

Format: App if on-the-go, sometimes web-app

Usage: Exploring the quickest route by car. Some use it to explore which mode of transportation is fastest.

Format: TV (only used from home and used by few)

Usage: General delays + traffic information

Format: Radio (Mostly used from car)

Usage: General delays + traffic information

Durham Region Transit Perceptions, Motivators and Barriers

Users:

Perceptions, Motivations, and Barriers

General Perceptions From Users

- Among users, Durham Region Transit gets largely positive reviews.
- Typically, users see the DRT as an efficient, easy to use, safe, and a clean experience.
  - Most are aware of, and anticipate, reasonable delays (<15 min) – this does not detract from their perceptions of the transit system because it feels inevitable for any transit system.
- Many perceive the DRT in relation to the TTC – with Durham Region Transit benefiting.
  - Most users have experienced the TTC or, at the very least heard about the TTC on the news, and see it as overcrowded, dangerous, dirty, delayed, etc.
  - By comparison, the DRT feels clean, safe, less crowded, timelier, etc.
  - The exceptions, however, are related to frequency (TTC runs much more frequently), more routes, and late-night service (TTC, on some routes, runs 24-hours).

> *"The public transit in Durham Region is fairly good. I don't really have any complaints."*
>
> ***- DRT User***

> *"There are occasionally delays, but I feel like these are to be expected with any transit system and they are very infrequent."*
>
> ***- DRT User***

> *"Most of the time, I have to say it's pretty seamless. And I think seamless is a very important thing from a public transportation system."*
>
> ***- DRT User***

General Perceptions From Users who have accessibility needs

- For physical accessibility needs, such as chronic pain and mobility challenges, the DRT is mostly accommodating when it is not too busy.
    - Most riders are willing to give up their seat and/or keep the accessible seating clear.
    - The bus lowering at boarding and disembarking is helpful.
- That said, some mention that when the bus system is busy it is harder to navigate their accessibility concerns.
    - Without a visible disability, such as someone who suffers from chronic pain, it can be harder to access a seat.
    - Further, it can be harder to manoeuvre the bus when there are lots of people compared to an emptier bus.
- Generally, users are widely unaware that there is an on-demand service. Most have not even heard about it. When mentioned, it does spike interest.

> *"I suffer from chronic backpain. It can be hard to find a seat sometimes."*
>
> ***- DRT User***

> *"I like that the bus lowers so it's a gentler step down."*
>
> ***- DRT User***

> *"Sometimes there is like a big stroller in the way of the accessible seats."*
>
> ***- DRT User***

Users – Motivators for Taking the DRT

- **Cost**
  - Users are aware of the cost saving they gain from taking public transit (gas, insurance, parking).
  - Most feel as though the DRT is a service that offers good value for money.
- **Productivity**
  - Many transit users enjoy their time on the bus and view it as an opportunity to be productive or enjoy some leisure time.
  - Some do homework, listen to podcasts, read a book, enjoy the scenery, etc.
- **Reliable**
  - Generally, DRT users view the service as reliable granting it some grace when it comes to tolerable delays (under 15 minutes)
- **Avoid parking**
  - With a rise in parking cost and car related crime, Travelers are concerned about parking their cars in public areas.
- **Social**
  - Some users enjoy being around others while they ride the bus. They find the experience to be community-building.
- **Safe**
  - Generally, the DRT is seen as a safe mode of transportation. Many users are nervous driving their own personal vehicles or have had bad experiences in cars that make them feel as though cars are unsafe.
- **Freedom (for non-drivers)**
  - For those who don't drive, such as teenagers and young adults, the service the DRT provides offers a sense of freedom and independence.
- **Fun/adventure**
  - Particularly with kids, taking the bus is an activity in and of itself. It is a part of an adventurous outing on a weekend or day off school.

> *"It feels safe and clean and comfortable, all those things. There's only ever been one experience with my daughter by guardianship where she experienced chaos on the bus."*
>
> ***- DRT User***

> *"These days the 401 can feel dangerous driving on it so I definitely feel like the bus is a safer option."*
>
> ***- DRT User***

> *"My husband and I needed a second car but it was just so expensive. We said let's give the bus a try and see if we can go without buying one and we could. We save so much money not owning a second car."*
>
> ***- DRT User***

Users – Barriers for Taking the DRT

General barriers for taking Durham Region Transit include (in descending order of importance):

- **Crowded times of day** – morning and evening rush hours, end of school time, etc.
  - When the bus is crowded, riders feel uncomfortable with their personal space being invaded, claustrophobic, and concerned about germs being spread.
- **Bad weather** – rain, snow, and ice are top concerns.
  - Aside from general discomfort with being cold and wet, riders are concerned about appearance. Waiting at the bus stop when it is raining could ruin a work outfit or make riders feel dishevelled.
- **Late-night travel** – perceived as a combination of time and daylight hours (seasonal).
  - Late night travel feels more dangerous. Riders are concerned about encountering dangerous individuals or walking from the bus alone in the dark.
- **Travel off main routes** – travel away from main thoroughfares is seen as less convenient than major lines due to increased walk times. DRT could improve its coverage throughout residential neighbourhoods. 15minute+ walk times to the bus stop pose as a barrier.

> *"If it is late at night and I've been drinking with friends there is no way I am taking the bus."*
>
> ***- DRT User***

> *"I always have CP24 on in the background and if the weather is looking bad then I will take an Uber to work. I don't need to stand at a stop in the rain."*
>
> ***- DRT User***

> *"If I have to walk for more than 15 minutes, I'll probably either Uber to the stop or Uber the whole way."*
>
> ***- DRT User***

Users – Barriers for Taking the DRT cont.

General barriers for taking Durham Regional Transit include:

- **30min+ wait times** – if there is a 30+ min wait for the next bus, users are more likely to explore other options.
- **Large baggage** – when travellers have more than 1-2 bags, they are less inclined to take the DRT due to physical and social barriers.
- **Inconsistent schedules/routes** – users express frustration with "weekend routes" or "night schedules" that cause their typical route to have an inconsistent schedule. The unpredictability causes stress and annoyance.
- **Multi-destination travel** – when users have multiple destinations in one journey, they are less likely to take the DRT as the logistics can become complicated and stressful in addition to the additional time required waiting at stops for another bus. Further, there is greater room for error and lateness should there be a delay.

> *"If there was somewhere to store your bags I would definitely use that. I always feel rude having large bags on the bus."*
>
> ***- DRT User***

> *"After 30 minutes of waiting I start to get really annoyed."*
>
> ***- DRT User***

> *"The bus route that is most helpful for me only runs on weekdays. On the weekend I have to take a much longer route which is just annoying."*
>
> ***- DRT User***

Non-Users:

Perceptions, Motivations, and Barriers

Non – Users: General Perceptions

- Most non-users have very limited familiarity with the DRT. Most do not know:
  - The coverage/routes
  - The schedule/frequency
  - The cost
  - The “look” or “design” of the buses
  - Etc.
- While often the TTC comparison works in favour for users, the TTC “infamy” acts as a negative halo for Durham Region Transit.
  - Non-users are apprehensive to try the transit system because they assume that, like the TTC, it could be unsafe, crowded, and dirty.

> *“I actually think I would just get lost, and it would be a waste of time.”*
>
> ***- DRT Non- User***

> *“I just hear really bad stories on the news about unstable people on transit. I haven’t heard about it in Durham, but I think it would be the same.”*
>
> ***- DRT Non-User***

> *“I just don’t know where it goes or where to catch it. My car is right outside my house so it’s pretty easy to just get in the car.”*
>
> ***- DRT Non-User***

Non-Users – Potential Motivators for Taking the DRT

Pull Factors
Compelling reasons to use the DRT

- **Back-up transportation**
  - Right now, most non-users consider rideshare (Uber) as their main back-up transportation if their car is unavailable.
- **Role Modelling**
  - Some mention that when their kids reach teen years, they would familiarize themselves with the bus system to teach their teenagers.
- **Hands-Free**
  - Some could be interested in taking on a more passive form of transportation if they need to do work or take a call while in transit.

Push Factors
Reasons to not rely on a car

- **Cost Save**
  - Many have not calculated how much they would save if they took the DRT more frequently.
  - That said, drivers are acutely aware of how expensive it is to maintain a car and pay for gas.
- **Parking (Price and Car-Safety)**
  - Many complain about parking cost and availability – especially at the GO station.
  - Further, drivers are concerned about their cars' safety when parked in public areas. Travelers have heard about an uptick in car thefts and are anxious about parking.

These are factors that we will explore further in the quant survey.

> *"I will probably learn to take it when my kids get a bit older. I would want them to be comfortable with it when they are teenagers."*
>
> ***- DRT Non-Users***

> *"I could see myself taking it to the GO station. I do get a bit nervous leaving my car at the station."*
>
> ***- DRT Non-Users***

> *"I'm sure it would be a lot cheaper than driving a car."*
>
> ***- DRT Non-User***

Non-Users – Barriers to Taking the DRT

- The **top barriers to ridership are poorly informed assumptions, deep-seated habits, a fear of the learning curve, and extremely limited familiarity – even of how to learn about the service**.

Misinformed Assumptions

- Most non-users assume that the bus system offers a negative experience, like other regional transit systems they are familiar with (such as the TTC and YRT).
- Most common assumptions are that the DRT is unsafe, over-crowded, inefficient (not direct), and all around and unpleasant experience.

Deep-Seated Habits

- For individuals who have a car in their driveway (vast majority), their instinct is to use it – it is seen as the easiest, fastest and most direct mode of transportation within the region.
- Many fall into the routine of using their car.
- For individuals who did not grow up in Durham, many moved to the area under the assumption that they needed a car and have never challenged this assumption.

> *"I think I just assume it would take me forever to get to work."*
>
> ***- DRT Non-User***

> *"I moved to Durham knowing that it was more car friendly, so I always just used my car."*
>
> ***- DRT Non-User***

> *"I used to use the TTC, and it was so crowded, so I just assumed that the DRT was the same."*
>
> ***- DRT Non-User***

Non-Users – Barriers to Taking the DRT cont.

Limited Familiarity

- There are too many unknowns to make using it feel attractive - in terms of cost, schedule, routes, general experience etc.
- Given these unknowns, **there is general reluctance to "just try it" – given the convenience of driving, they simply aren't willing to take a risk or spend time learning new options given that they don't see a strong benefit or reason to take DRT**

Fear of the learning curve

- For some, trying out the DRT feels daunting.
- They don't know where to go to learn how to use it.
- It feels as though it could be a lot of work to learn how to use Durham Region Transit.
- ***Even among some users of the service, they rely on family members to determine the route/times of DRT and would be uncomfortable navigating the service themselves.***

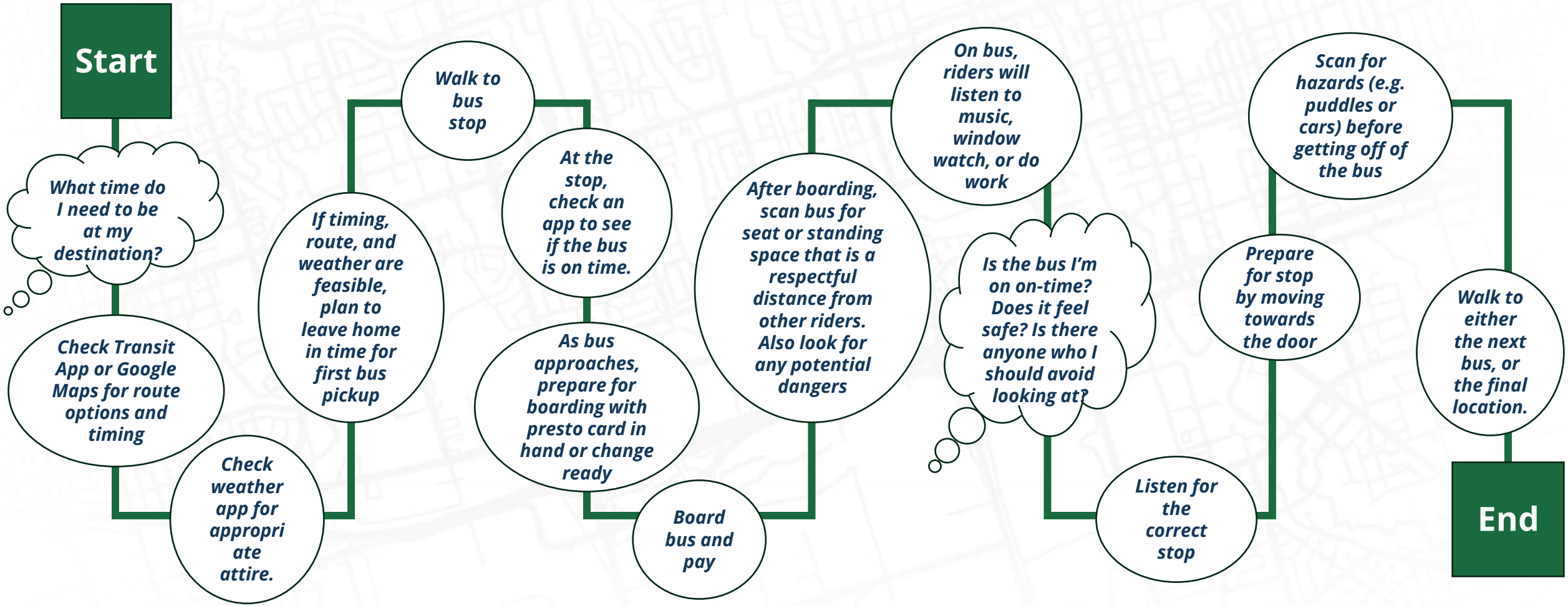
> *"I just don't even know where to start with the bus."*
>
> ***- DRT Non-User***

> *"I feel like it could mess up my schedule. I know what time I need to leave and what time I need to be there right now with the car."*
>
> ***- DRT Non-User***

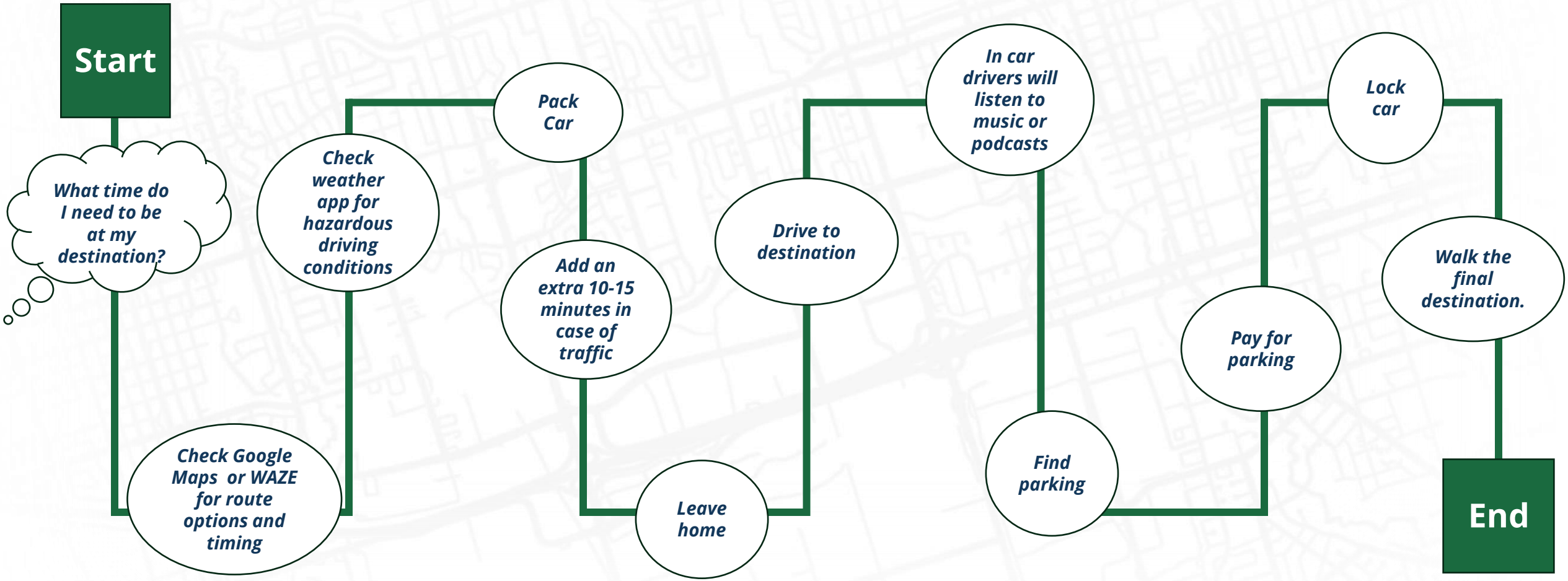
> *"I'm sure they (DRT) have a website, I just haven't used it. I would probably start there if I wanted to look into using the bus system."*
>
> ***- DRT Non-User***

Durham Region Transit Customer Journey Experience

Customer Journey – Users



Customer Journey – Non- Users



Pre-Journey:
Trip Preparation

General Behaviour:

- Most individuals plan their trip backwards.
  - They start with the time they need to be somewhere and work backwards to their time of departure.
- Transit users generally fall into two stages of preparation:

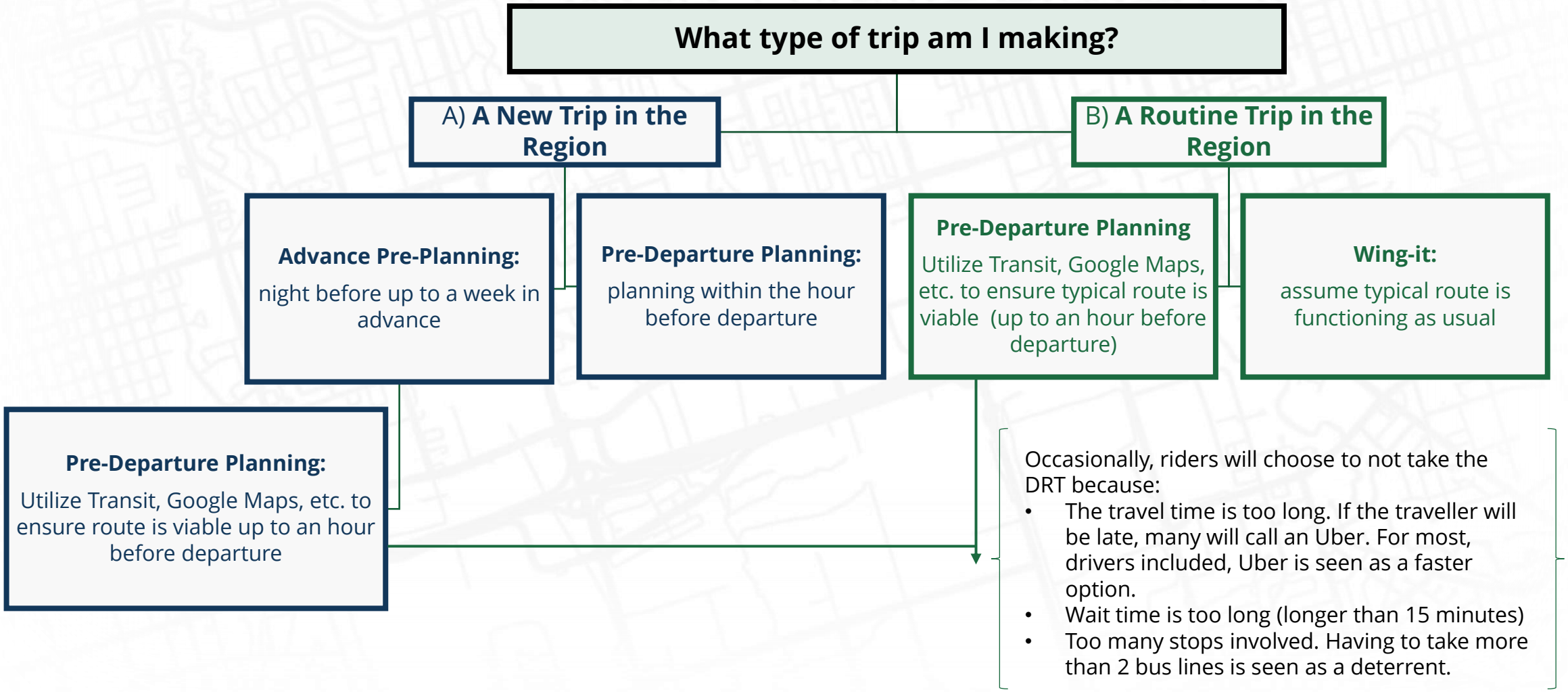
Pre-Planning
- For new destinations or multi-modal travel -

- Pre-planning occurs well in advance – the night prior up to a week before.
- Common when traveling to a new location, when connecting to multiple transit systems or using multiple transit modes.
- Involves multiple information sources: transit app/planner, google maps, the weather app, etc. Many do not rely on a single information source as the “voice of truth”

Checking (shortly before departure)
- Verifying known/planned routes -

- Occurs closer to the time of departure or at time of departure
- Last chance to select and alternative route before departure
- Circumstances that could impact their mode choice: weather, traffic, delays, etc.

General Behaviour by Trip Type:



Room For Improvement

- There is exceedingly low awareness among users of the Transit app and/or it's full capabilities:
- Among the few who use it, those who do – love it.
  - They feel that it is user friendly, reliable, and accurate.
- Those who use the Transit trip planner function on the DRT website like and appreciate the functionality.
  - Most aren't aware that there is an app format that offers similar functionality.
  - There is interest in an app interface for the trip planner.
- Finally, nearly all have low awareness that the Transit app connects with other transit systems outside of Durham Region.

> *"I used to use the trip planner on the Durham Transit website, but I feel like it's hard to use on my phone."*
>
> ***- DRT User***

> *"Oh I didn't know it existed in app format. I'll have to check that out."*
>
> ***- DRT User***

> *"I usually just use google maps which is mostly accurate but can be wrong. I do wish there was a more accurate tool."*
>
> ***- DRT User***

Barriers to Using DRT

Occasionally, riders will choose to not take the DRT because:

- *The travel time is too long* - if the traveller will be late, many will call an Uber. For most, drivers included, Uber is seen as a faster option.
- *Wait time is too long* (longer than 15 minutes)
- *Too many stops involved* - having to take more than 2 bus lines is seen as a deterrent.
    - Further, there is anxiety about missing one of the connecting buses and being late.
- *The route is not direct* – meaning they have to walk a distance to get to their destination (longer than 15 minutes is a deterrent).
- *Early or late arriva*l – when they are likely to arrive over 20 minutes early or any form of late, many will explore other options.

Trip Journey:
Step 1: Waiting for the Bus

What Works: Waiting for the Bus

- The Durham Region Transit bus stops currently align with what users expect from a bus stop.
  - They are clearly marked with obvious signage.
  - Most agree that the shelters are clean with a comfortable seat.
- Many have a bus stop within a 10-minute walk from there house which is seen as an acceptable and reasonable distance.
- At large stops, such as GO Stations, most agree that it is easy to find the DRT pick-up zone from the GO platforms.

> *"I have a strop right outside my house, so it is so easy to wait for the bus because I basically wait from my house and then come out when it arrives."*
>
> ***- DRT User***

> *"It's pretty easy to see where the bus picks you up from the GO Station."*
>
> ***- DRT User***

> *"The signage is good at the bus stops. It's pretty clear where they are."*
>
> ***- DRT User***

Room For Improvement : Waiting for the Bus

- As the region expands, many express concern that some individuals won't be close enough to certain bus stops – there is a desire for more routes and stops to be added.
- The bus stops have a few opportunities for improvement:
  - Better lighting, particularly in the evenings
  - More visible non-smoking signs to deter people from smoking in the shelters
- While travellers appreciate that delays will occur, most are unwilling to wait longer than 15 minutes; at this point, they will switch modes (likely call a rideshare).
- Some mention a desire for electronic signage that can be updated with bus arrival times
- At Go Stations, it would be helpful to have a full DRT route map and detailed information about the upcoming bus times.

> *"The city is expanding, and the public transit system has expanded over the past decade, but I think it could be better still."*
>
> ***- DRT User***

> *"I don't like waiting at my stop at night because it can be kind of dark."*
>
> ***- DRT User***

> *"I'm not sure what the public transit could do about this, but I always have people smoking in the bus shelters which makes me not want to wait inside them."*
>
> ***- DRT User***

Trip Journey:
Step 2: Boarding the Bus

What Works: Boarding the Bus

- Most feel as though boarding the bus is a smooth and acceptable experience.
- The bus pulls up at a good distance to the curb allowing for a safe step-up onto the bus.
- Some note that the bus lowers when it stops.
- Many are aware of the new-one fare policy on Presto and appreciate this policy change.

Room For Improvement : Boarding the bus

- There is some confusion regarding payment for the bus when it comes to cash.
- Many are unaware that it is more expensive to pay using cash.
  - This policy is frustrating is some teenage riders who may not have access to a Presto card or consistent funds to pre-load a card.

> *"I usually just pick up the change I need before I leave the house for school. I don't have enough money to load a Presto."*
>
> ***- DRT User***

> *"I like that the bus lowers to me so if I have a big bag, it's less of a step up."*
>
> ***- DR User***

> *"I do like the new one fare policy. Makes taking public transit downtown to work a bit more attractive."*
>
> ***- DRT User***

Trip Journey:
Step 3: Riding the Bus

What Works: Riding the Bus

- When not crowded, users have a mostly positive experience riding Durham Region Transit.
  - **Seats:** users find the seats to be comfortable.
  - **Cleanliness:** most say that the buses are very clean especially in the mornings. Many do note that towards the end of the day the cleanliness deteriorates slightly – this is understood and accepted by users.
  - **Drivers:** There is a strong degree of trust between users and drivers.
    - Many trust the drivers to deliver them to their destinations safely and to help them should the need arise.
    - Most say the drivers are generally pleasant and courteous.
  - **Safety:** most say they feel safe riding the DRT. The other passengers feel like safe individuals. Again, on this metric, the DRT benefits from a comparison to the TTC's reputation.

> *"I feel like it's very comfortable. I just do my homework and listen to music."*
>
> ***- DRT User***

> *"I trust the drivers a lot. They are professional drivers so I believe that they will get me somewhere safely."*
>
> ***- DRT User***

> *"It's actually very clean. You can really tell that they clean it every night."*
>
> ***- DRT User***

Room for Improvement : Riding the Bus

- **Though mostly positive, there are opportunities that could improve the ride experience on Durham Region Transit.**
  - **Storage:** Some users express interest in having larger/more storage compartments.
    - Having groceries, luggage, or other bulky items is a large detractor from taking Durham Region Transit.
    - Beyond being heavy, there is a social concern with baggage. Many feel like their baggage is inconvenient for other riders – causing stress.
    - Some suggest that an overhead storage compartment, such as on a plane, or under seat compartment, could mitigate these issues.
  - **Public curtesy:** While many feel as though riders can be courteous and respectful, there are also a number of riders who are pushy, put their feet on the seat, don't take their backpack off, etc.
    - Further, most say they have not seen Durham Region Transit publicize or post any communications about public transit etiquette (as they have seen on GO Transit).
  - **Poor communication related to delays:** Users greatly appreciate consistent, honest, and timely announcements about delays and why they are happening. Many say they are more forgiving of delays when they are adequately informed.
    - Use think that DRT drivers could more consistently and in better time update them on why delays are happening.

> *"I wish there was a storage space like on a coach bus, so I didn't bump other people."*
> ***- DRT User***

> *"There is always a teenager or two who puts their feet on the seat or does something unpleasant."*
> ***- DRT User***

> *"Most of the time I am forgiving of a delay as long as I know about it and get consistent and honest updates."*
> ***- DRT User***

Trip Journey: Step 4: Disembarking and Arrival at Destination

What Works: Arrival at Destination

- Most say that the bus typically arrives on time.
- The bus often lowers to allow for a smooth disembarking.
- Typically, other riders move to allow for others to exit the bus before they enter – though some say there could be more signage to ensure this expectation is clearer.
- Mostly, their stop is within a 10–15-minute walk of the destination. This is seen as an acceptable time, particularly in good weather conditions.

Room For Improvement : Arrival at Destination

- A few mention that bus drivers do not always look at barriers near the back door (e.g., telephone poles, puddles) making it difficult to get off the bus, particularly with bags/back-packs.
- Some mention that the bus hits their breaks too quickly causing them to lose balance.
- If the distance to their final destination is more than a 15-minute walk, they would not consider the bus.

> *"I feel like It's easy to get off. People are usually courteous to give me space."*
>
> ***- DRT User***

> *"Sometimes they stop with the door lining right up with a pole or something, so I think the driver just needs to be a bit more mindful sometimes."*
>
> ***- DRT User***

> *"I hate when they slam on the breaks and the whole bus of people just fall over a bit."*
>
> ***- DRT User***

On – Demand Service

What Works: On-Demand Service

- Among the minority who use this service, experiences with the On-Demand Service are very positive.
- Booking is seen as easy and user friendly.
- The first step is to call to book; during this call, they are directed to the app to make a 'booking'.
- Pick-up times are accurate – the service comes when it says it is going to come.
- The price feels fair for the service that is offered.

Room For Improvement: On-Demand Service

- There is very low awareness about this service. Few know it exists.
- Many have misinformed assumptions about the service. For example, some think it is just for senior citizens or those with severe accessibility challenges.
- Sometimes there is limited room for companions.
- The ride itself is seen as very "rough" – particularly for those who are in wheel-chairs and require a tie-down.

> *"It has been a lifesaver for me after I tore my ACL. With my surgery I can bend my knee, so the extra space is essential."*
>
> ***- DRT User***

> *"I haven't had an issue with the schedule. They have always come at the time they said they would."*
>
> ***- DRT User***

> *"I find it really easy to book. The first time I gave them a call and they directed me to the app which I've been using since."*
>
> ***- DRT User***

Appendix: Travel Outside of Durham Region

When the GO Train Makes Sense…

- For travel from Durham into areas in the GTA, GO Transit is a “no-brainer” for all Travelers – users and non-users alike.
  - Most mention that they use GO Trains more frequently than GO buses.
  - To many, it feels “crazy” to even conceive of driving in downtown Toronto due to traffic and parking stressors.
- Among users and non-users, GO receives strongly positive reviews.
  - While being public transit, most view the service that is offered as best-in-class.
  - The trains feel extremely clean, very safe, and consistently reliable – more so than the DRT.
- Non-DRT users don’t express any qualms about taking the GO Train.
- Users are likely to take the DRT to the GO Station, an experience that most say is easy and seamless.
- Non-users are more likely to drive and park at the station. Driving works well for many. Some do get anxious about the safety of their car in the parking lot. Also, at the “end of a long day” they just want to get home and not have to wait for a train. Finally, some arrive too late/past the point of when the buses stopped running.

> *I mostly take the GO train because it's just you're on one track off all the way downtown. It’s very efficient.”*
>
> ***- DRT User, Alicia***

> *“I wouldn’t take the bus to the GO station because you need your timing to be really spot-on to catch the train.”*
>
> ***- DRT Non-User, Rose***

> *“For getting downtown the GO Train is a lot more predictable than driving. Driving is bound to delay you.”*
>
> ***- DRT User, Paul***

When the GO Train does not make sense…

- When traveling outside of Durham, but not to the GTA, many say they are more likely to consider driving a personal car or taking a rideshare – especially if they are traveling with multiple people.
    - For example, on weekends, some say they will visit family or take their kids to a playdate outside of Durham. A car is most desirable for this kind of trip because it is a more direct route.
- Many Durham residents will travel into the GTA for social events that could run late or involve alcohol consumption, such as sports games or concerts.
    - During these circumstances, Travelers are more likely to take an Uber for at least their trip home to Durham.
    - Interestingly, some users say that they are more comfortable taking the GO Train home late at night, but not comfortable taking Durham Region transit from the GO station. For late night travel into the city, the GO Train has more lights on than the bus – the darkness of the DRT bus makes people nervous.

> *"If I am going to see my parents in Scarborough with the kids we would probably just drive because it would be cheaper and less of a headache."*
>
> ***- DRT User***

> *"Sometimes I go out to the bars in Toronto with my girlfriends. I'm not about to get on the Go late at night if I've been drinking. It's not the safest option."*
>
> ***- DRT Non-User***

> *"I'm more comfortable on the Go Train late at night than I am the DRT. I don't like that they turn the lights off. I understand it helps them drive but it makes it feel more eerie."*
> ***- DRT User***

Thank You!

Durham Region Transit

Understanding travel behaviour within the region & benchmarking DRT customer satisfaction

Quantitative Findings

RESEARCH OBJECTIVES AND METHODOLOGY

Background

Durham Regional Transit (DRT) was looking to partner with a market research agency to help develop and launch its first ever annual wave of Customer Satisfaction Tracking.

As part of this initiative, the team at DRT was looking for guidance as to how best to design the methodology and approach to align with key milestones along the 'transportation journey' and capture a robust sample of current and potential DRT riders for statistical analysis.

The requisites for this initiative included:

- Creating a visual representation of the Customer Journey map – the key milestones will provide a framework from which to measure and monitor key inflection points/moments of truth along the journey
- Create a robust framework and survey process and distribution plan to collect and analyze existing and future customer feedback about DRT services
- Develop a questionnaire instrument (customer service survey) that allows DRT to measure progress against a suite of customer satisfaction metrics
- Launch & field the initial survey
- Obtain feedback on key factors within the customer's experience with transit
- Analyze the feedback/results (collect, analyze and summarizing the data) to provide the organization with tangible actions to improve customer satisfaction moving forward

Objectives & Methodology

Objectives

More specifically, this research was designed to address the following objectives:

- Provide an initial benchmark of DRT customer satisfaction across key touchpoints of the transit experience
- Assess motivations and barriers to using DRT among both current and potential riders
- Analyze feedback to identify actionable insights that will inform service improvements and enhance the rider experience

In order to meet these objectives, HarrisX developed a 2-phase approach including both qualitative and quantitative methodologies.

Methodology

Phase 1: Qualitative Deep Dive

- 25 one-on-one interviews (45 mins each) were conducted with current (15) and potential (10) DRT users living or working in Durham Region. The sample included a mix of ages, cities, household types, transit usage, travel purposes, ethnicities, and accessibility needs, with current users including both specialized and on-demand riders. The purpose of this phase was to understand the perceptions of DRT, motivations/barriers to consideration, as well as the travel journey in the region.

Phase 2: Quantitative Survey

- 12-minute online survey conducted by HarrisX
- The total number of completions was 788, broken down by sources:

Panel	Social Media	Website	Email/Text Outreach	QR Code
367	41	34	190	156

- To qualify, respondents had to be 16 years of age or older, live, work, and/or go to school in Durham Region, and be a non-rejector of DRT.
- The overall sample composition was weighted to reflect more normal regional and DRT ridership proportions.
- Statistical Testing:
  - Total vs. Subgroups: Green / Red = Findings which are 95% statistically

Recap of the Qualitative Phase Key Findings

Learnings

Among Users

- Durham Region Transit is positively regarded by its users.
  - •The transit system is seen as efficient, clean, safe, and user friendly.
- Users identify a few notable barriers to the transit system that present an opportunity for DRT to improve their service. These include:
  - •Baggage storage
  - •Increased and more timely communications about delays
  - •More consistent weekend service
  - •Reducing overcrowding at busy times
  - •Better coverage in residential areas
- While most users are generally content with the service they receive, many express concern that Durham Region Transit won't keep up with the growing needs of the area.
  - •As the population of Durham grows, and geography expands, users want the DRT to expand their infrastructure accordingly – particularly in terms of frequencies, more buses and greater route options.

Recap of the Qualitative Phase Key Findings (continued)

Learnings

Among Non-Users

- Non-Users tend to be extremely habitual, with transit options securing little, if any, conscious consideration. *"I just get into my car – I don't even give it a second thought."*
- Many currently avoid the DRT because it is an unknown experience and are intimidated by the learning curve related to routes and stops. Taking the DRT feels daunting to non-users. *"I don't even know where I would get it or how I'd get to where I need to go. I guess I would Google it?"*
- This concern is grounded in a few key causes:
    - Halo effect from other transit systems makes non-users assume that the DRT is unclean, crowded, and dangerous. (E.g., Travelers hear/have experienced that the TTC can be unsafe and assume the DRT is the same.)
    - Many are unsure as to how they would learn to use the system. There is extremely limited awareness of the Transit app and other resources that Durham Region transit offers. *Increasing awareness of these resources could help mitigate this sense of uncertainty.*
    - "Important" trip occasions, such as the commute to work or school, has a little room for error and lateness. As such, it is currently seen as risky to DRT for commuting purposes. *Rather, many are open to trying DRT for a "destination" trip – such as to a mall – where they do not have to worry about being on time.*

Quantitative Respondent Overview

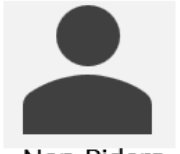
There are key subgroup audiences we focus on throughout the report, which are broken down based on Ridership as well as Age cohort:

Recent Riders
n=130

Taken DRT in the past week

Infrequent Riders
n=51

Taken DRT within the past 2 weeks – 6 months



Non-Riders
n=608

Taken DRT 6 months ago, or never

16-24 (Student)
n=63

People aged 16-24 currently enrolled in school

18-69 (Employed)
n=482

People aged 18-69 who are employed.

60+ (Retired)
n=150

People aged 60+ who are retired.

EXECUTIVE SUMMARY

Key Takeaways: Mode Choice Drivers and Satisfaction Priorities

Mode Choice Factors & Implications

Travel time/trip length, destination, and weather are the top stated considerations for mode choice in the region.

- Students are highly influenced by trip duration, cost, and schedule convenience.
- Among seniors, they are more likely than the average to state that their trip purpose, knowledge of the route, and number of people traveling with them are factors that influence which mode they choose. *This suggests that building familiarity with DRT's service routes/offering will be key in helping seniors become more comfortable and consider DRT in the future.*

Drivers of Satisfaction & Focus Areas

Satisfaction is modestly strong but trails other public transit options.

- 70% of those who used DRT for their most recent trip are satisfied with their experience.
- However, satisfaction trails both GO and TTC, particularly in the proportion saying they are extremely satisfied with their experiences. *Given the amount of cross-transit usage in the region, many will benchmark their service expectations on other transit options – in this case, GO Transit in particular.*

When focusing on the specific elements of the journey, satisfaction is strong.

- Riders are most satisfied with: the safety of the ride, boarding/getting off the bus, and the comfort of the ride.

Top areas of opportunity for DRT (below average satisfaction/performance and above-average importance) are specifically related to poor OTP, long wait and transfer times, and poor communication related to delays and on-route changes.

- *These are top priorities for DRT to focus on improving, as they are the most likely to drive satisfaction.*

Key Takeaways: DRT Brand Health Strengths and Conversion Challenges

Durham Regional Transit – Brand Health KPIs

DRT is currently well-positioned for growth but currently fails to convert from familiarity to ridership.

- Overall familiarity is strong, with nearly 80% of those living/working in Durham Region at least somewhat familiar with the service.
  - DRT riders demonstrate strong conversion at each stage of the funnel — from familiarity to recent use, past-week usage, and future consideration — *indicating a stable and engaged rider base*.
  - Despite the high level of familiarity with the service, this hasn't translated into ridership, with only one-third of those surveyed saying they have taken DRT in the past year. That said, *63% of those who did use DRT within the past year say they would consider it again — indicating an opportunity among occasional users.*
    - This is heavily skewed by age – while nearly three-quarters of students report taking DRT in the past year, this decreases to 40% among employed adults and then to 20% among seniors. *This suggests that targeting by age segment will likely be necessary.*
- Residents view DRT positively, with the service most strongly associated with: being safe, modern form of transportation, an excellent way to get around and good value.

Among riders, perceptions are clouded by overcrowding and delays, leading to lower satisfaction that could impact ridership long term.

- Nearly two-thirds of recent riders report that DRT has a lot of delays and nearly 60% feel that it is overcrowded, *suggesting that given the opportunity for alternatives, current riders may switch modes – particularly given that duration of trip is a top driver of mode choice.* In fact, among those who are dissatisfied with their recent DRT experience, nearly 50% spontaneously mentioned delays and unreliable service as the top reason.

Key Takeaways: Past Week Travel Behaviour Patterns

Past Week Travel Behaviour

- On a regional level, **the top 3 trip purposes, by far, are: running errands, shopping/retail and work**. This is followed by a wide margin by social visits and attending doctor's appointments.
  - Among **employed adults, over 80% report traveling for work in the past week**, far overshadowing any other type of trip.
  - For **students, 90% took a trip for school.**
  - Among **retired seniors, running errands (74%) and shopping (68%) are the top two trip purposes**, while 56% report a past-week trip to the doctors.

- **Personal vehicles are the top mode of transportation** across all occasions (exception: school trips are primarily serviced by DRT).

- Nearly one-quarter of those who live/work in Durham did use public transit to commute to/from work; for most other trip purposes, ~10% take public transit.
  - The main exception is when dropping a child off at school – only 2% use public transit for this purpose.

- Interestingly, nearly 50% report that their volunteering and social plans tend to happen within the region but outside of their city – *suggesting a communication opportunity for DRT.*

- Among those who have taken DRT in the past week, more than half used it as part of a multi-public transit connection – specifically with GO Transit. *Given this extremely high level of cross-usage, aim for seamless integration with GO Transit – including DRT signage/route details at key GO stations, drop-off times that coincide with GO train times, etc.*

Key Takeaways: Most Recent Travel Behaviour Patterns

Most Recent Trip Details

- When asked specifically about their most recent trip within the region, the top purposes are work, errands and shopping/retail. Among students, their most recent trip purpose was actually for entertainment while.
  - *Worth noting is that 66% of students took DRT for their most recent trips, suggesting that they are using DRT for purposes beyond to and from school.*
  - However, only 23% of employed adults used public transit for their most recent trip, *suggesting that public transit has been pigeon-holed for only specific purposes (work), reinforcing the need to give them a 'reason to believe' DRT would be an appropriate choice for a wider range of trip purposes.*

- The average length of time for a trip using public transit is 38 minutes versus 18 minutes for driving their personal vehicle.

- Over 80% of recent DRT riders brought a backpack/shoulder bag/small briefcase with them – *suggesting the importance of having space to store these items on the bus, particularly in poor weather conditions.*
  - Those who took a personal vehicle for their most recent trip are much more likely than public transit users to have a purse or grocery bags with them – aligning with their trip purpose differences (work vs. shopping/errands).

- Three-quarters of travelers are habitual – they always use the same mode *suggesting it could be challenging to change behaviour, given that travel mode is not a high priority decision.*
  - DRT riders are slightly less habitual (62%), 15% saying they make the transportation decision a day or more in advance, *suggesting the importance of convenient and user-friendly scheduling resources.*

Additional Recommendations

1. Strengthen Familiarity – which will result in increased consideration

- Focus outreach on **infrequent riders and older adults (60+),** who show the lowest familiarity.
- Car-dependent non-riders are less viable targets, with nearly half stating nothing would motivate them to take DRT.

2. Improve Service Reliability & Convenience

- Prioritize improvements on key **drivers of satisfaction**:
  - Wait times at stops
  - Delay communication
  - Transfer timing
  - Punctuality and speed

Make real-time communication through apps such as Google Map to manage expectations and reduce perceived unpredictability. Increase awareness, usage and information available through the DRT app.

3. Motivate Ridership Through Service Enhancements

- Consider improving those areas that are top motivators cited by riders and potential riders:
  - Closer stops to home/destination (30%)
  - More frequent buses (20%)
  - Faster trips (18%)
  - Longer operation hours (especially evenings/weekends)

Additional Recommendations (continued)

4. For Marketing - Tailor Messaging by Segment & Trip Purpose

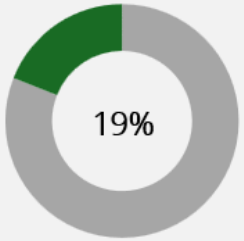
- Highlight speed, reliability, and affordability in messaging – particularly for students/youth and seniors.
- Emphasize coverage and ease of use for older adults and those with accessibility needs.
- Promote DRT as a viable option for commuting to work and school, where transit already plays a key role.
- Promote DRT for non-'standard' travel purposes such as entertainment or social events.

5. Monitor and Adapt Through Ongoing Research

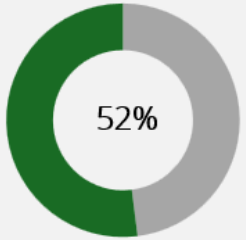
- Implement periodic tracking of satisfaction on key service attributes to monitor performance.
- Conduct annual mode choice studies to understand shifting travel patterns and barriers.

Durham Regional Transit KPIs

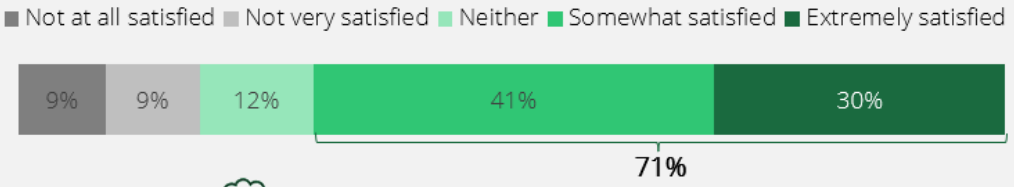
DRT Usage
– Most Recent Trip
(n=788)



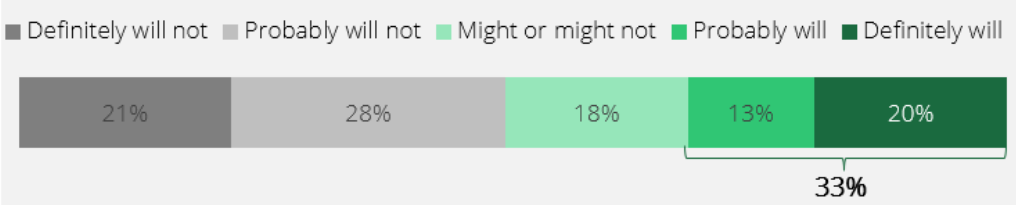
DRT Future Consideration
(%definitely/probably will n=788)



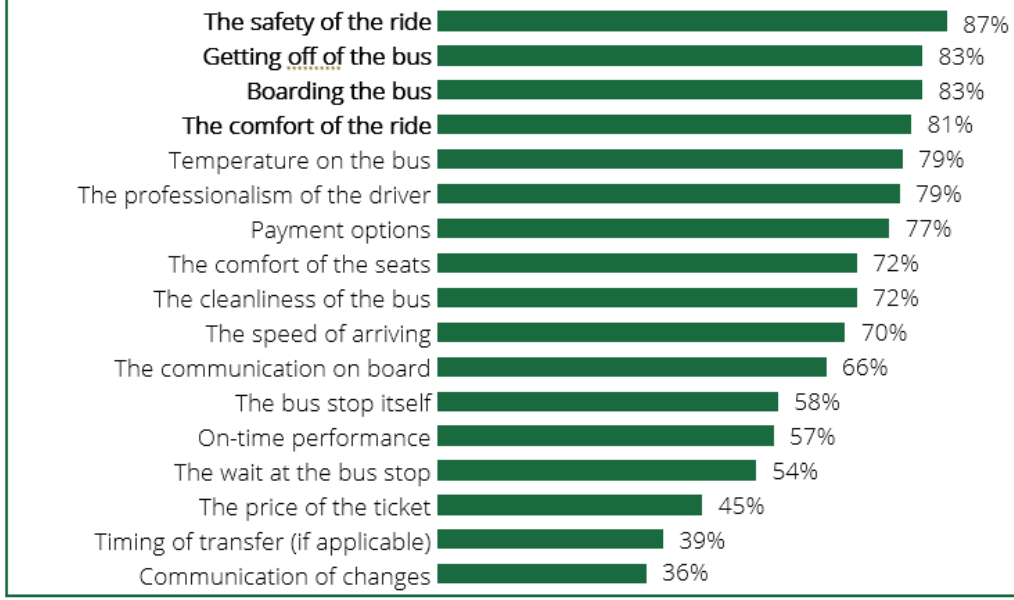
DRT Satisfaction
– *For The Most Recent Trip*
(n=151)



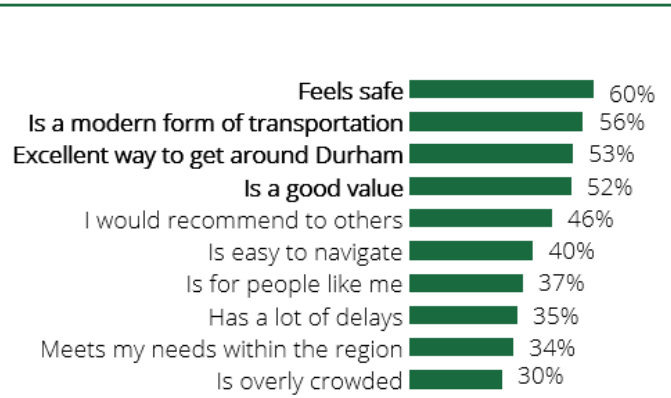
DRT Future Consideration
- For the exact type of trip
(n=788)



DRT Satisfaction (specific elements)
– *For The Most Recent Trip*
(% very/somewhat satisfied n=151)



DRT Associations
(% strongly/somewhat agree n=788)



Recent Riders	Non-riders
130	608
73%	**55%**
63%	55%
54%	53%
62%	**49%**
57%	**43%**
64%	**34%**
68%	**29%**
65%	**28%**
60%	**27%**
56%	**24%**

Customer Journey Maps

29% of people used car for running errands

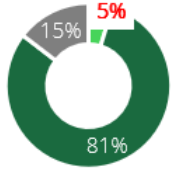
for their most recent trip within Durham Region

n = 167

1st Pre-Trip

Time Plan in Advance

- 1 hour before / Last minute
- Habitual
- 2 hour to days before



Top 5 Factors Considered When Choosing Mode

Travel time	65%
The weather conditions	60%
Location of your final destination	55%
Length of your trip	55%
Convenient schedule	49%

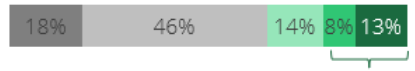
Satisfaction With The Mode

- Not at all satisfied
- Not very satisfied
- Neither
- Somewhat satisfied
- Extremely satisfied

96%

Future Consideration for Same Purpose

- Definitely will not
- Probably will not
- Might or might not
- Probably will
- Definitely will



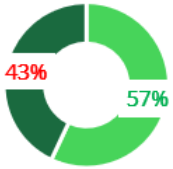
21%

2nd Trip Details

Average travelling time: 18.9 minutes

Travel Companions

- Alone
- With companion



Partner/spouse	44%
Children aged 10 and below	31%
Other Adults	33%
Teens/pre-teens	13%
Business colleagues	3%

Items Carried

3rd Looking Ahead...

Top 5 Reasons Not Using DRT

Prefer driving	48%
Prefer door-to-door transportation modes	25%
Needed a car at my destination	24%
Takes too long	22%
Did not want to spend the time waiting for the bus	22%

Top 5 Motivators For Using DRT In Future

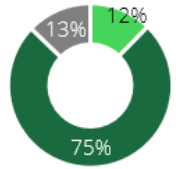
Stops closer to my home/final destination	31%
Make it easier for me to learn about DRT	16%
Make fares less expensive	15%
Increase the number of buses along my route	13%
Make the trip faster	10%

Durham Region Transit harrisx

26% *of people* **used car for Shopping**
for their most recent trip within Durham Region
n = 150

1st Pre-Trip

Time Plan in Advance

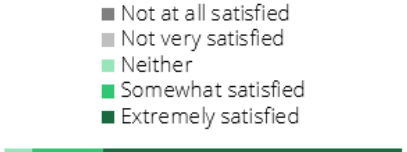


- 1 hour before / Last minute
- Habitual
- 2 hour to days before

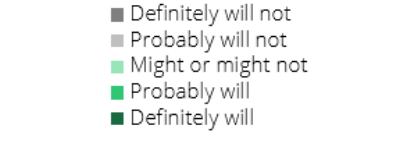
Top 5 Factors Considered When Choosing Mode

The weather conditions	59%
Travel time	59%
Location of your final destination	56%
Reliability	49%
Time of day	49%

Satisfaction With The Mode



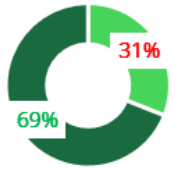
Future Consideration for Same Purpose



2nd Trip Details

Average travelling time: 19.7 minutes

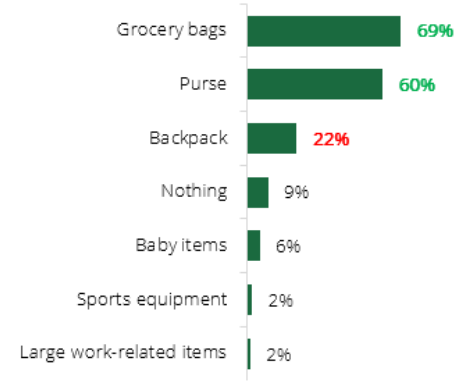
Travel Companions



- Alone
- With companion

Partner/spouse	47%
Other Adults	38%
Children aged 10 and below	26%
Teens/pre-teens	16%
Business colleagues	2%

Items Carried



3rd Looking Ahead...

Top 5 Reasons Not Using DRT

Prefer driving	43%
Did not want to spend the time waiting for the bus	28%
Takes too long	25%
Needed to bring a lot of items on this trip	22%
Departure / arrival times do not fit my schedule	16%

Top 5 Motivators For Using DRT In Future

Stops closer to my home/final destination	36%
Nothing - there is nothing that Durham can do	31%
Make fares less expensive	19%
Make it easier for me to learn about DRT	17%
Increase the number of buses along my route	17%

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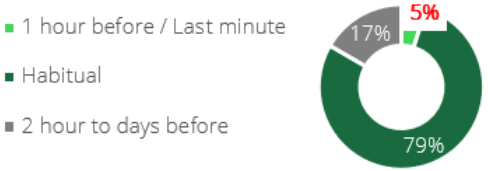
25% of people used car to go for Work
for their most recent trip within Durham Region
n = 143

1st Pre-Trip

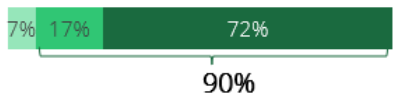
Time Plan in Advance



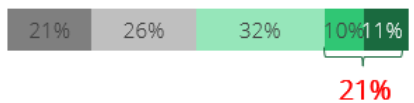
Top 5 Factors Considered When Choosing Mode

Location of your final destination	61%
Convenient schedule	57%
Reliability	56%
Travel time	55%
Time of day	52%

Satisfaction With The Mode



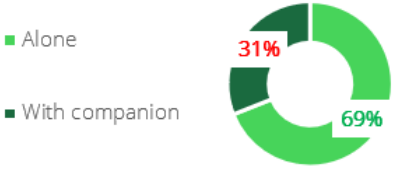
Future Consideration for Same Purpose



2nd Trip Details

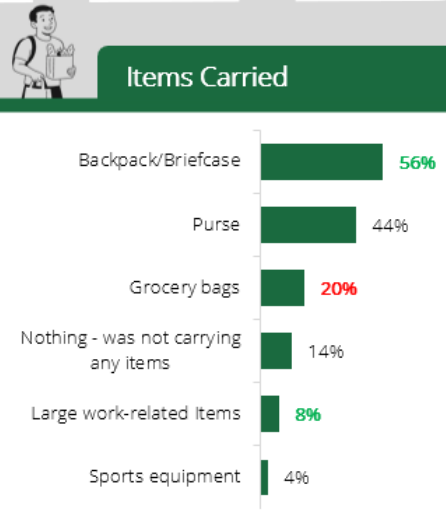
Average travelling time: 21.4 minutes

Travel Companions



Partner/spouse	48%
Other Adults	29%
Children aged 10 and below	20%
Business colleagues	17%
Teens/pre-teens	6%

Items Carried



3rd Looking Ahead...

Top 5 Reasons Not Using DRT

Prefer driving	47%
Takes too long / other modes of transportation are faster	33%
Prefer door-to-door transportation modes	26%
Departure / arrival times do not fit my schedule	24%
Bus does not travel to the destination(s) I need	15%

Top 5 Motivators For Using DRT In Future

Stops closer to my home/final destination	36%
Nothing - there is nothing that Durham can do	30%
Make the trip faster	29%
Increase the number of buses along my route	18%
Expand the hours of operation	14%

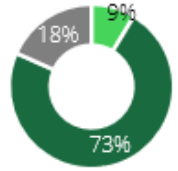
50% *of people* ***used DRT to go for Work***

for their most recent trip within Durham Region

n = 76

1st Pre-Trip

Time Plan in Advance

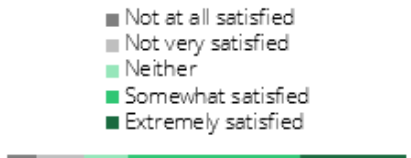


- 1 hour before / Last minute
- Habitual
- 2 hour to days before

Top 5 Factors Considered When Choosing Mode

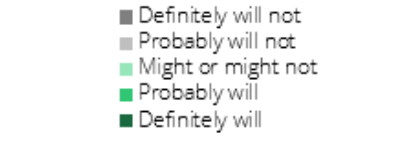
Travel time	64%
Reliability	**60%**
Waiting time	58%
Length of your trip	54%
Convenient schedule	48%

Satisfaction With The Mode



70%

Future Consideration for Same Purpose



92%

2nd Trip Details

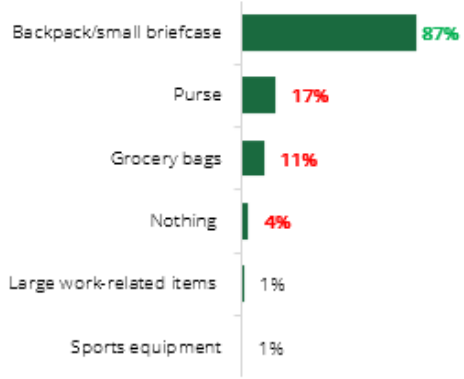
Average travelling time: 36.4 minutes

Travel Companions

- Alone
- With companion

Other Adults	**46%**
Business colleagues	**22%**
Teens/pre-teens	17%
Partner/spouse	**8%**
Children aged 10 and below	**4%**

Items Carried



3rd Looking Ahead...

Top 5 Satisfied Elements with DRT

(%very/somewhat satisfied)

The safety of the ride	88%
Getting off of the bus	86%
Payment options	**85%**
Boarding the bus	85%
The comfort of the ride	81%

Top 5 Dissatisfied Elements with DRT

(%very/somewhat dissatisfied)

Communication related to any changes	34%
Timing of transfer (if applicable)	31%
The wait at the bus stop	30%
On-time performance	29%
The speed of arriving at your final destination	23%

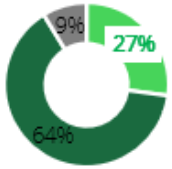
Durham Region Transit harris

31% of people used DRT for School
for their most recent trip within Durham Region
n = 47

1st Pre-Trip

Time Plan in Advance

- 1 hour before / Last minute
- Habitual
- 2 hour to days before



Top 5 Factors Considered When Choosing Mode

Travel time	66%
Reliability	61%
Waiting time	56%
Overall cost	55%
Length of your trip	52%

Satisfaction With The Mode

- Not at all satisfied
- Not very satisfied
- Neither
- Somewhat satisfied
- Extremely satisfied

67%

Future Consideration for Same Purpose

- Definitely will not
- Probably will not
- Might or might not
- Probably will
- Definitely will

89%

2nd Trip Details

Average travelling time: 40.2 minutes

Travel Companions

- Alone
- With companion

Other Adults	48%
Partner/spouse	29%
Children aged 10 and below	22%
Teens/pre-teens	8%
Business colleagues	2%

Items Carried

3rd Looking Ahead...

Top 5 Satisfied Elements with DRT
(%very/somewhat satisfied)

The safety of the ride	90%
Temperature on the bus	82%
Boarding the bus	79%
The comfort of the ride	78%
The professionalism of the driver	78%

Top 5 Dissatisfied Elements with DRT
(%very/somewhat dissatisfied)

The wait at the bus stop	44%
On-time performance	37%
The price of the ticket	36%
Timing of transfer (if applicable)	35%
Communication related to any changes	33%

Durham Region Transit harrisx

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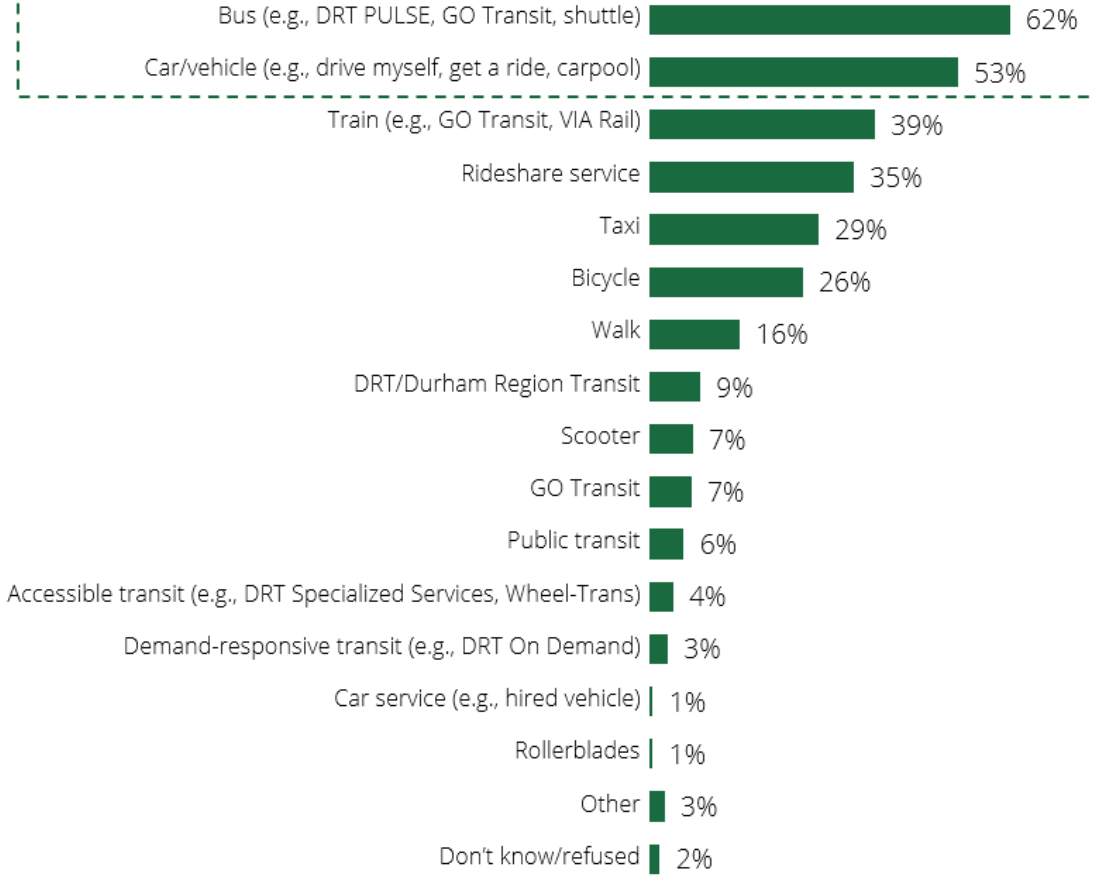
- BRAND HEALTH
- TRIP BEHAVIOUR: PAST WEEK TRIPS
- TRIP BEHAVIOUR: MOST RECENT TRIP
- BARRIERS TO CONSIDERATION
- TRIP BEHAVIOUR: DOOR-TO-DOOR SERVICE
- RIDER PROFILES

DRIVERS OF MODE CHOICE

Bus and car are the most top-of-mind transportation options in Durham. Note that currently, unaided awareness of DRT-specific services like On Demand or Specialized Transit is extremely low (≤4%)—highlighting a critical visibility and brand awareness gap.

Modes of Regional Transportation (open-ended)

Base: Total n=788



	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
	130	51	608	63	482	150
Bus (e.g., DRT PULSE, GO Transit, shuttle)	69%	72%	60%	76%	65%	54%
Car/vehicle (e.g., drive myself, get a ride, carpool)	38%	53%	56%	57%	51%	61%
Train (e.g., GO Transit, VIA Rail)	39%	45%	38%	46%	41%	30%
Rideshare service	25%	41%	37%	10%	37%	30%
Taxi	19%	43%	30%	13%	29%	33%
Bicycle	24%	27%	27%	36%	28%	18%
Walk	16%	16%	15%	27%	15%	13%
DRT/Durham Region Transit	10%	10%	8%	11%	9%	13%
Scooter	8%	4%	8%	7%	9%	4%
GO Transit	7%	12%	7%	5%	8%	9%
Public transit	5%	5%	6%	9%	6%	2%
Accessible transit (e.g., DRT Specialized Services, Wheel-Trans)	3%	3%	4%	1%	2%	12%
Demand-responsive transit (e.g., DRT On Demand)	12%	2%	1%	6%	4%	2%
Car service (e.g., hired vehicle)	1%	3%	0%	3%	0%	1%
Rollerblades	0%	0%	1%	0%	1%	0%
Other	2%	2%	3%	3%	2%	6%
Don't know/refused	3%	3%	1%	5%	2%	1%

Q8. What are some of the different modes of transportation that a person could use when traveling within Durham Region? Please type in your response below and be as specific as possible.

Travelers primarily choose transportation modes based on travel time, destination, and weather. Recent DRT riders are more influenced by waiting time and reliability, while students prioritize trip duration, convenient schedules, and overall cost.

Factors considered in choosing transportation mode

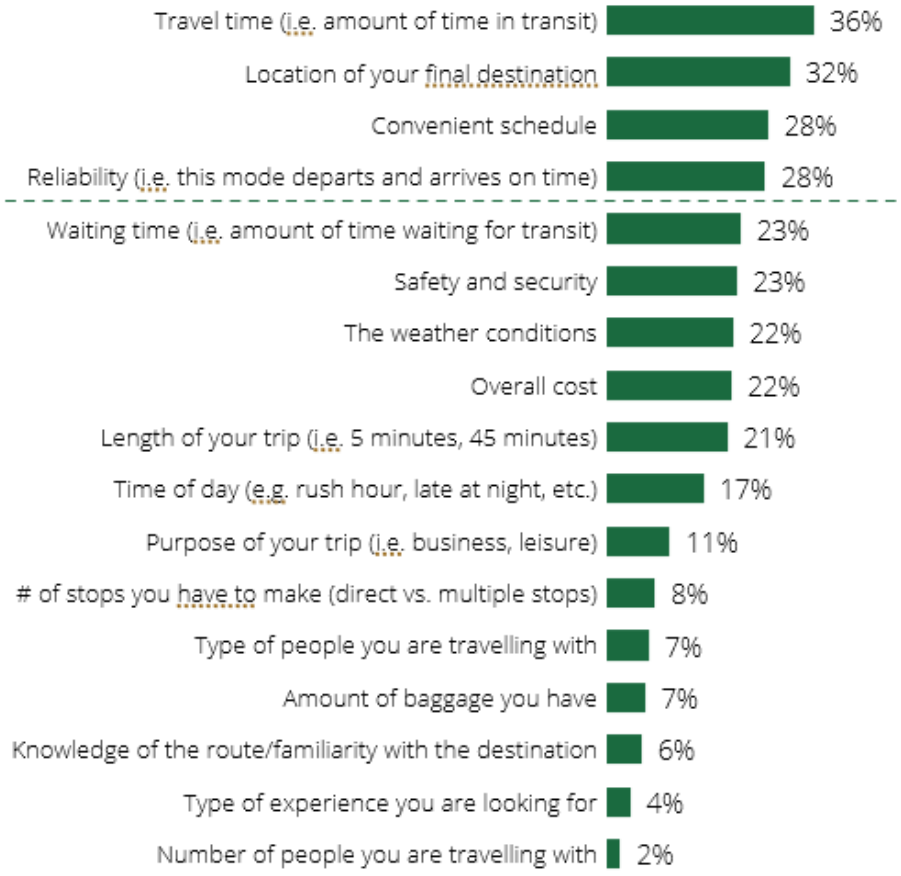
Select all that apply Base: Total n=788

	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
	130	51	608	63	482	150
Travel time	59%	54%	58%	62%	59%	66%
Location of your final destination	50%	57%	54%	51%	55%	58%
The weather conditions	42%	47%	52%	51%	47%	55%
Length of your trip	50%	48%	47%	60%	49%	46%
Waiting time (i.e. amount of time waiting for transit)	57%	56%	45%	48%	52%	47%
Reliability	54%	45%	46%	47%	49%	47%
Convenient schedule	52%	43%	45%	63%	47%	46%
Time of day (e.g. rush hour, late at night, etc.)	39%	50%	45%	40%	45%	46%
Overall cost	47%	35%	39%	57%	40%	36%
Safety and security	25%	31%	36%	32%	35%	35%
Purpose of your trip (i.e. business, leisure)	25%	31%	33%	19%	32%	43%
Knowledge of the route/familiarity with the destination	34%	34%	28%	32%	27%	40%
# of stops you have to make	31%	30%	28%	28%	26%	34%
Amount of baggage you have	17%	24%	27%	27%	25%	29%
Number of people you are travelling with	12%	24%	27%	22%	21%	34%
Type of experience you are looking for	16%	15%	20%	9%	20%	24%
Type of people you are travelling with	8%	17%	20%	6%	18%	17%

When asked to rank the key factors of mode choice, travel time and final destination are reinforced as the most influential factors, with convenient schedule and reliability emerging as followed key inputs, driven by recent riders. *This validates the qual finding that travel time and arrival time are top drivers of importance when selecting a mode of transportation.*

Top 3 Ranked Factors In Choosing Mode (Ranked 1-3)

Base: Those who selected more than 3 factors n=634



	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
	108	43	483	51	398	126
Travel time (i.e. amount of time in transit)	37%	34%	36%	43%	36%	35%
Location of your final destination	25%	36%	33%	12%	29%	48%
Convenient schedule	35%	25%	27%	37%	29%	25%
Reliability (i.e. this mode departs and arrives on time)	40%	20%	26%	29%	30%	21%
Waiting time (i.e. amount of time waiting for transit)	34%	34%	20%	41%	27%	11%
Safety and security	13%	19%	25%	23%	21%	25%
The weather conditions	14%	31%	23%	12%	21%	31%
Overall cost	25%	21%	21%	38%	20%	13%
Length of your trip (i.e. 5 minutes, 45 minutes)	25%	17%	20%	28%	24%	15%
Time of day (e.g. rush hour, late at night, etc.)	11%	19%	18%	12%	17%	13%
Purpose of your trip (i.e. business, leisure)	7%	11%	12%	4%	12%	17%
# of stops you have to make (direct vs. multiple stops)	5%	10%	9%	4%	5%	16%
Type of people you are travelling with	2%	3%	9%	1%	7%	5%
Amount of baggage you have	7%	6%	7%	7%	6%	10%
Knowledge of the route/familiarity with the destination	10%	8%	5%	3%	6%	10%
Type of experience you are looking for	3%	4%	5%	1%	5%	4%
Number of people you are travelling with	3%	2%	2%	5%	1%	0%

When asked to rank factors influencing mode choice, the location of the final destination consistently ranks highest—whether looking at top 1st, 2nd, 3rd ranks or overall scores.

Top 3 Ranked Factors In Choosing Mode

Base: Those who selected more than 3 factors n=634

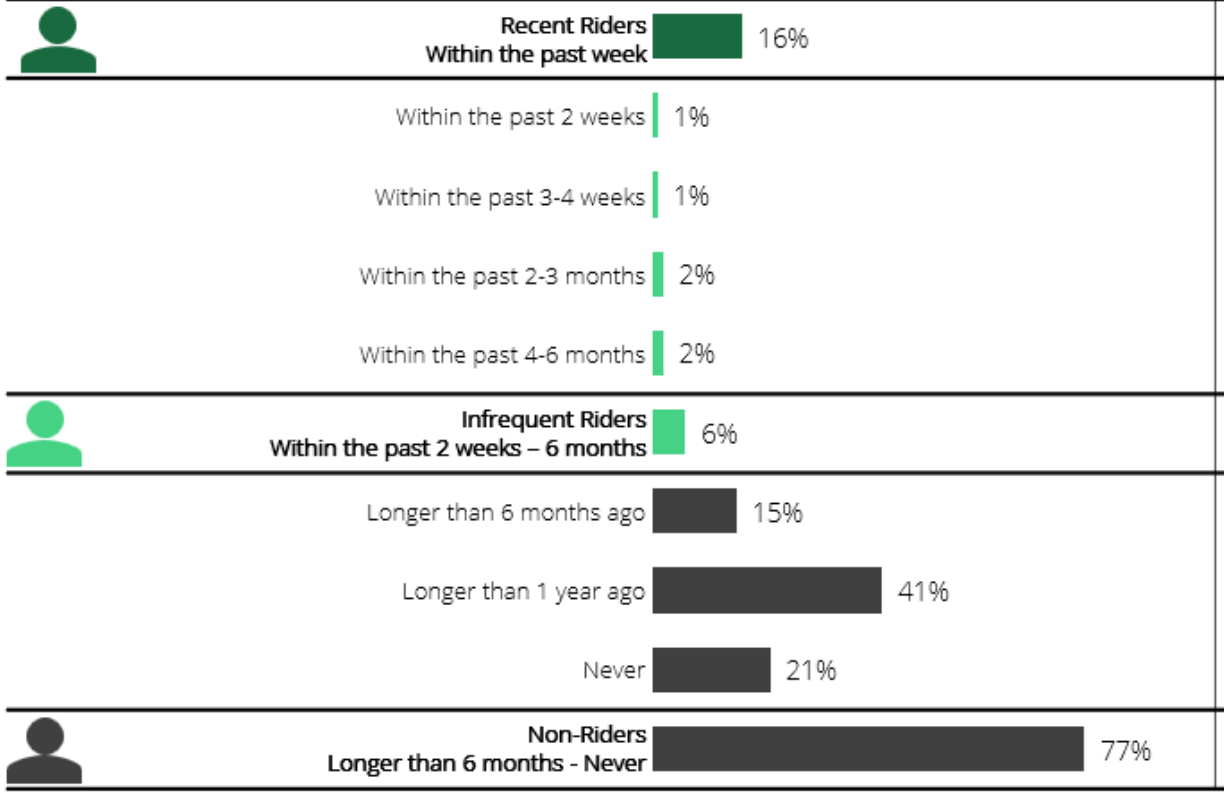
	1	2	3	RANK 1-3
Travel time (i.e. amount of time in transit)	12%	12%	13%	36%
Location of your final destination	14%	8%	10%	32%
Convenient schedule (i.e. schedule fits with my travel needs)	12%	8%	8%	28%
Reliability (i.e. this mode departs and arrives on time)	11%	8%	8%	28%
Waiting time (i.e. amount of time waiting for transit)	5%	9%	9%	23%
Safety and security	9%	7%	7%	23%
The weather conditions	6%	8%	8%	22%
Overall cost	10%	6%	6%	22%
Length of your trip (i.e. 5 minutes, 45 minutes)	4%	9%	8%	21%
Time of day (e.g. rush hour, late at night, etc.)	2%	8%	7%	17%
Purpose of your trip (i.e. business, leisure)	4%	3%	4%	11%
# of stops you have to make (direct vs. multiple stops)	3%	4%	1%	8%
Type of people you are travelling with	4%	2%	1%	7%
Amount of baggage you have	1%	3%	3%	7%
Knowledge of the route/familiarity with the destination	2%	3%	2%	6%
Type of experience you are looking for	1%	1%	3%	4%
Number of people you are travelling with	0%	1%	1%	2%

BRAND HEALTH PERFORMANCE

Snapshot of current ridership: Across the region, approximately 16% say they have taken DRT in the past week – however, this is heavily skewed towards students, with ridership declining with age (18% of employed adults report taking DRT in the past week compared with only 5% of those who are 60+ and retired).

Recency of DRT usage – ridership

Base: Total n=788



	Age		
	16-24 Student	18-69 Employed	60+ Retired
	63	482	150
Recent Riders Within the past week	**51%**	18%	**5%**
Within the past 2 weeks	4%	1%	1%
Within the past 3-4 weeks	2%	1%	1%
Within the past 2-3 months	3%	2%	1%
Within the past 4-6 months	0%	3%	3%
Infrequent Riders Within the past 2 weeks – 6 months	10%	6%	5%
Longer than 6 months ago	15%	16%	11%
Longer than 1 year ago	**20%**	40%	**53%**
Never	**4%**	19%	26%
Non-Riders Longer than 6 months - Never	**39%**	75%	**90%**

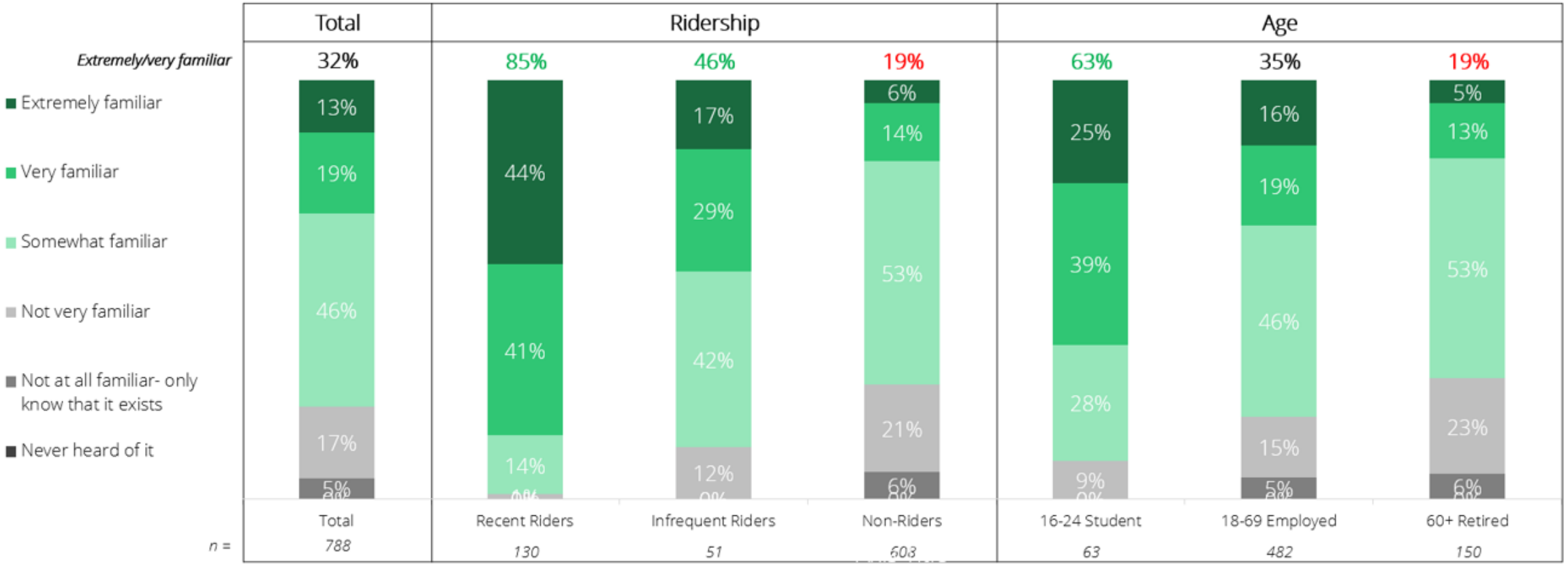
Q6. How recently, if ever, have you taken Durham Region Transit?

Familiarity is relatively strong across the region, with nearly 80% being at least somewhat familiar with the service. Regionally, those who live, work, or study in Ajax tend to have higher familiarity with DRT, while those in Pickering under index. As expected given their ridership behaviour, familiarity is strongest among students and then declining with age.

*Only **17%** in Pickering are very/extremely familiar with DRT—the lowest across all regions.*

Familiarity with DRT

Base: Total n=788

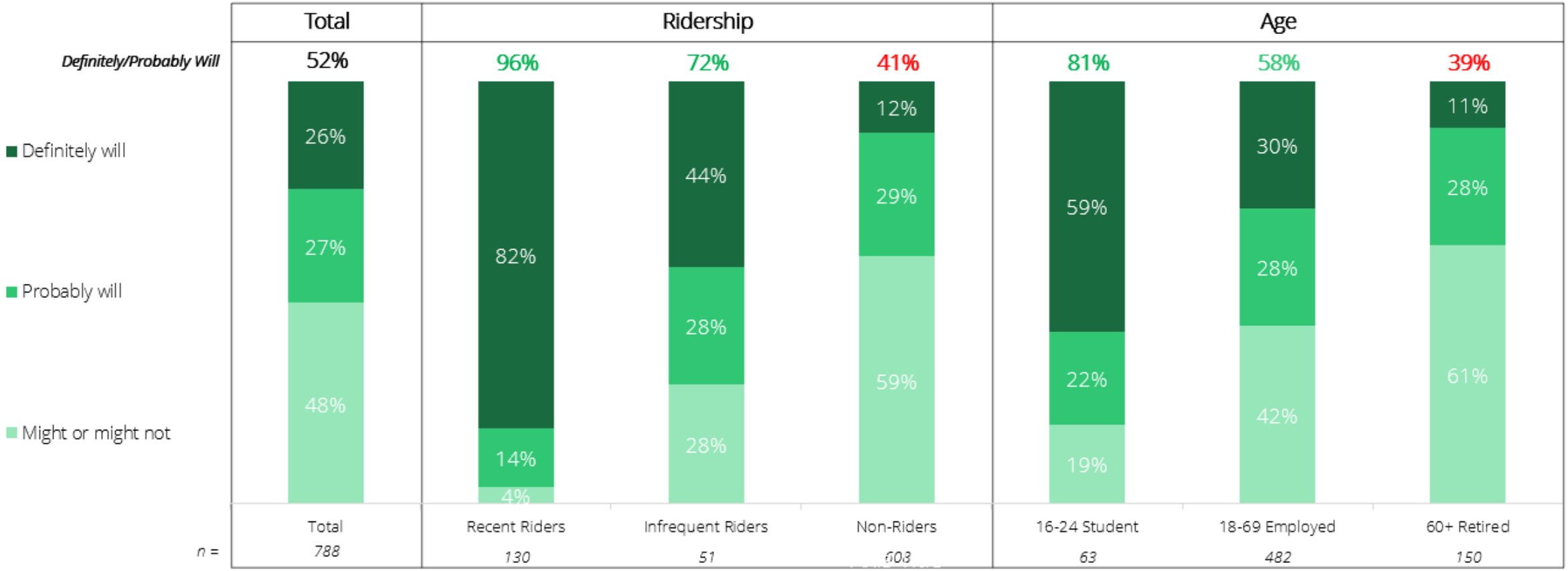


Q9. How familiar are you with Durham Region Transit?

More than half of respondents say they would be likely to consider using DRT in the future, with consideration strongest among recent riders and students, and notably lower among older and non-rider segments—highlighting clear opportunities for targeted outreach. (Note that rejectors were excluded from the research)

DRT Consideration

Base: Total n=788



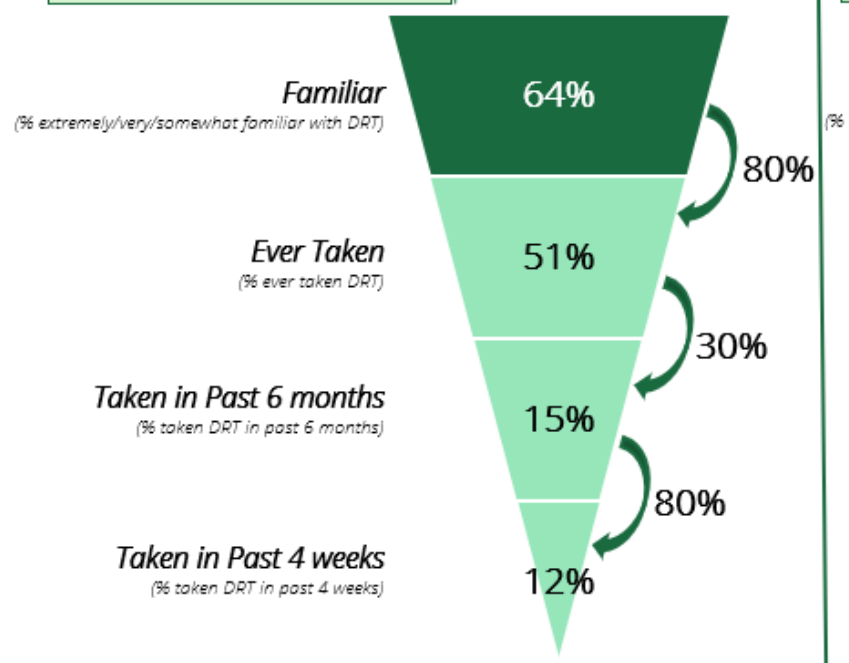
Q10. How likely would you be to take Durham Region Transit in the future, for any reason?

DRT riders demonstrate strong conversion at each stage of the funnel — from familiarity to recent use, past-week usage, and future consideration — indicating a stable and engaged rider base. However, only 36% of ever-used non-riders have taken DRT in the past year. Still, 63% of those who did use it within the past year say they would consider it again — indicating an opportunity to boost awareness and drive future consideration among occasional users.

- ***For people live/work/go to school in Durham Region:***
- *Among those familiar with DRT,* ***Half (80%)*** *have taken it before.*
- *Of those,* ***30%*** *have also used it in past 6 months, and* ***80%*** *of P6M suers have used in the past 4 weeks.*

n=788

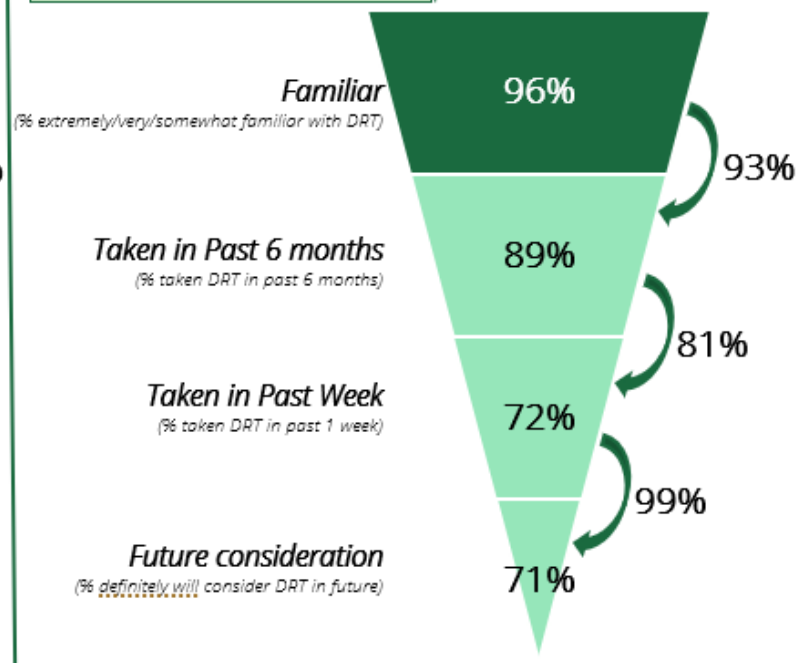
Total



- ***Riders*** *are defined as those who have ever taken DRT.*
- *Among familiar riders,* ***93%*** *have taken DRT in the past 6 months.*
- *Of those,* ***81%*** *have also used it in the past week.*
- *Encouragingly,* ***99%*** *of past-week riders say they would definitely consider using DRT again in the future.*

n=180

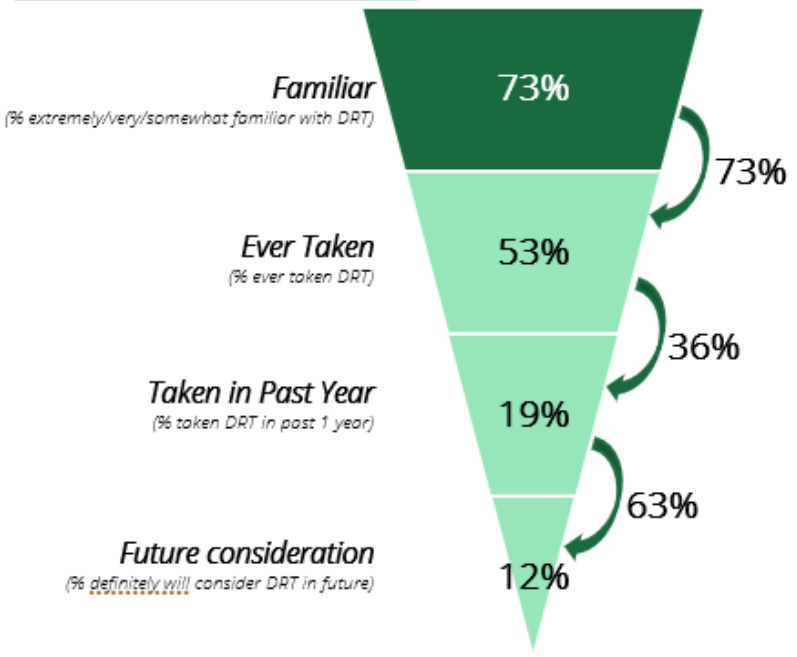
Riders



- ***Non-riders*** *are those who have ever taken DRT longer than 1 year.*
- *Among familiar non-riders,* ***73%*** *have ever taken DRT*
- *Of those,* ***only 36%*** *have used it in the past year.*
- *However,* ***63%*** *of past-year users say they would definitely consider using DRT again in the future.*

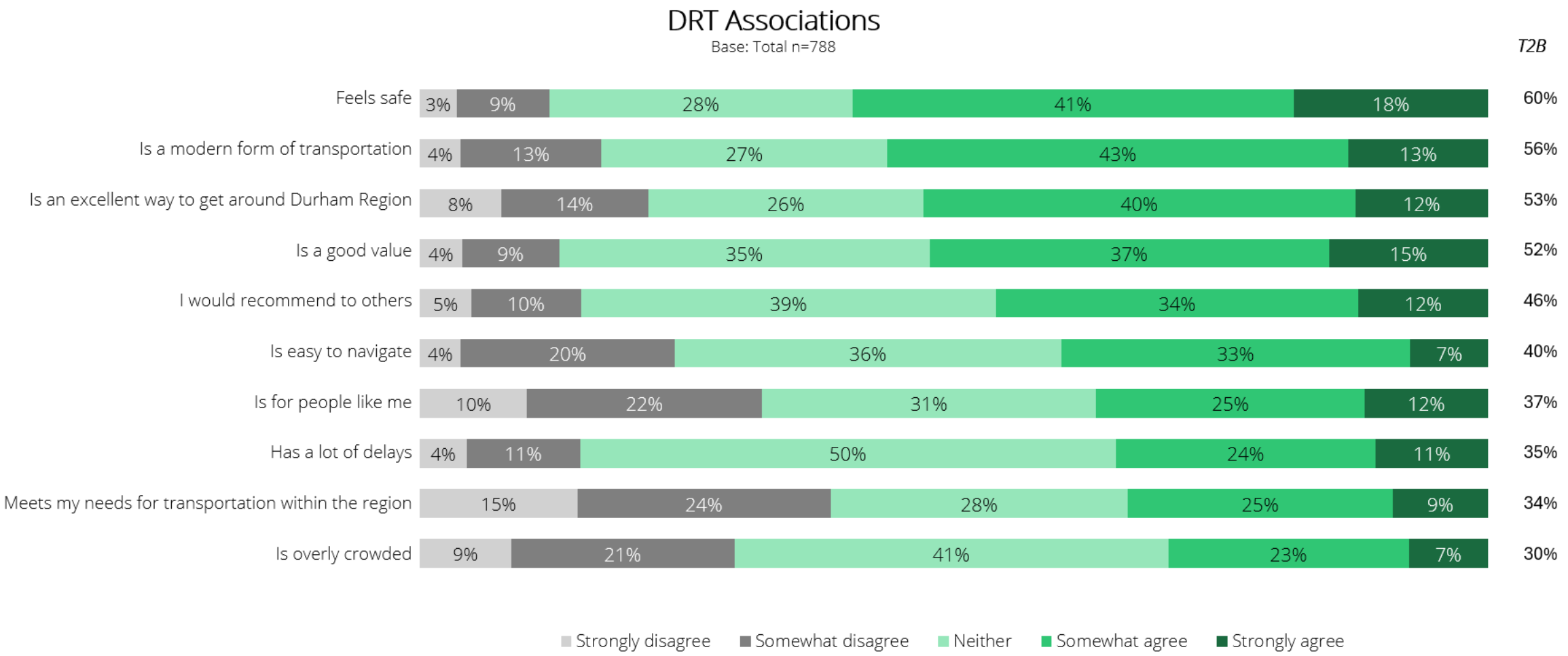
n=608

Non-Riders



Q9. How familiar are you with Durham Region Transit? Q10. How likely would you be to take Durham Region Transit in the future? ***Note that rejectors (those who say they definitely/probably would not take DRT in the future were excluded from this study)***

DRT is generally seen as safe and modern, but perceptions of personal relevance, navigation ease, and meeting transportation needs remain weaker with a significant proportion of residents saying that these phrases do not describe DRT —pointing to opportunities to better tailor messaging and improve functional delivery.

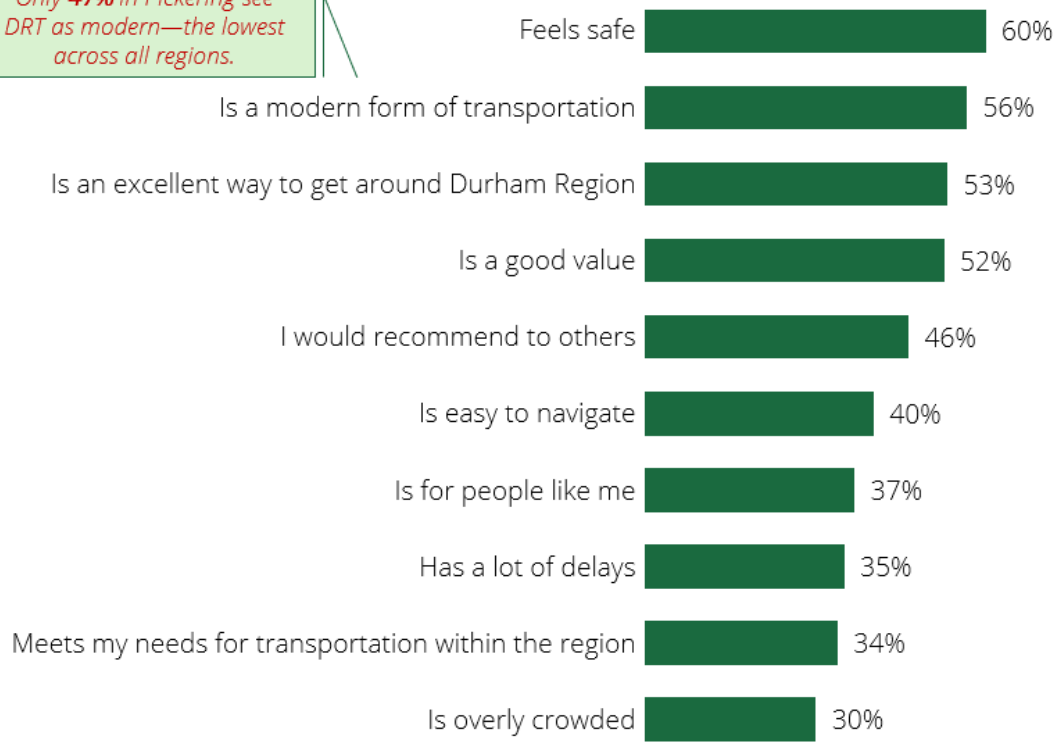


All sub-groups agree that DRT is safe, modern, an excellent way to get around and good value. However, recent riders are far more likely than others to associate delays and overcrowding with the service.

DRT Associations (% strongly/somewhat agree)

Base: Total n=788

*Only **47%** in Pickering see DRT as modern—the lowest across all regions.*

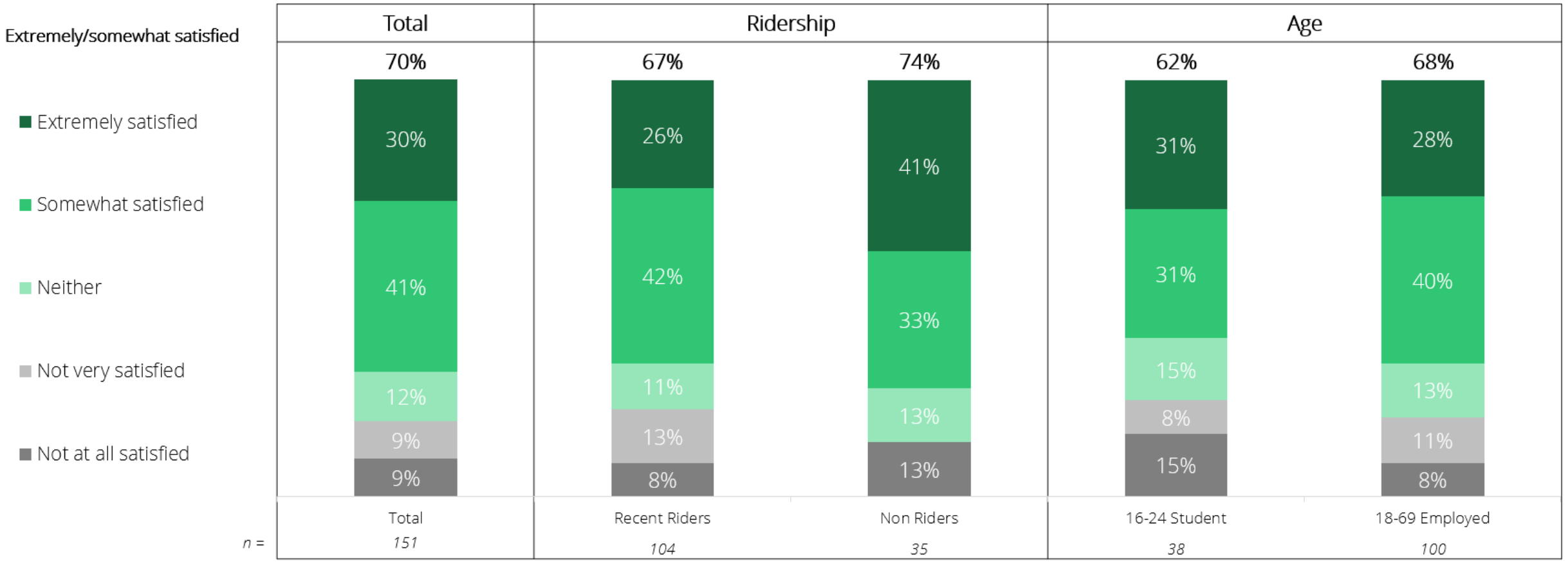


Ridership			Age		
Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
130	51	608	63	482	150
73%	75%	55%	64%	62%	60%
63%	59%	55%	63%	55%	59%
54%	49%	53%	48%	54%	54%
62%	62%	49%	51%	55%	55%
57%	58%	43%	44%	49%	42%
64%	50%	34%	60%	44%	32%
68%	50%	29%	67%	38%	31%
65%	42%	28%	62%	38%	14%
60%	44%	27%	48%	38%	20%
56%	35%	24%	58%	31%	11%

Overall satisfaction with DRT is strong, with 70% saying they are satisfied of which nearly one-third are extremely satisfied. However, 15% of students and 21% of retirees are extremely dissatisfied, suggesting that additional efforts are required to ensure the service is meeting their unique needs.

Satisfaction with DRT for the most recent trip

Base: Riders who used DRT for there most recent trip n=151



*only showing data for trip purpose with base size >30

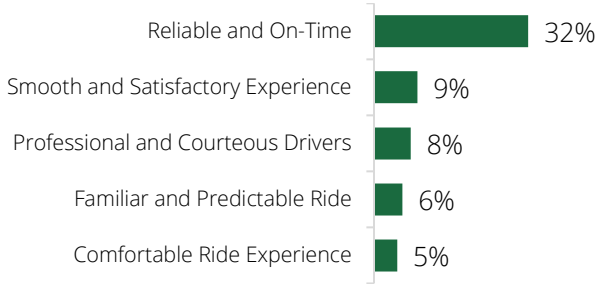
Q27. How satisfied were you with the transportation mode you used during this most recent trip?

*Small base size. Interpret with caution

While many satisfied DRT users cite reliability, smooth service, and courteous drivers as key positives, their counterparts in the dissatisfied group overwhelmingly point to unreliability and poor route accessibility as major pain points – ***revealing that timeliness and coverage are key drivers of sentiment on both ends of the experience spectrum. This is consistent with qualitative findings that show those living near a stop are generally more satisfied than those living further from DRT routes.***

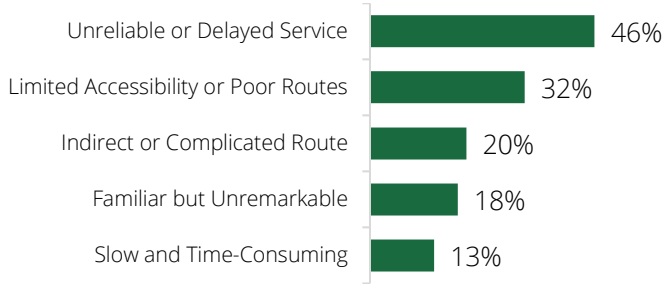
Reasons for satisfaction on most recent trip with DRT

Base: DRT user for the Most Recent Group (T2B Satisfaction) n=106



Reasons for dissatisfaction on most recent trip with DRT

Base: DRT user for the Most Recent Group (B3B Satisfaction) Total n=28*



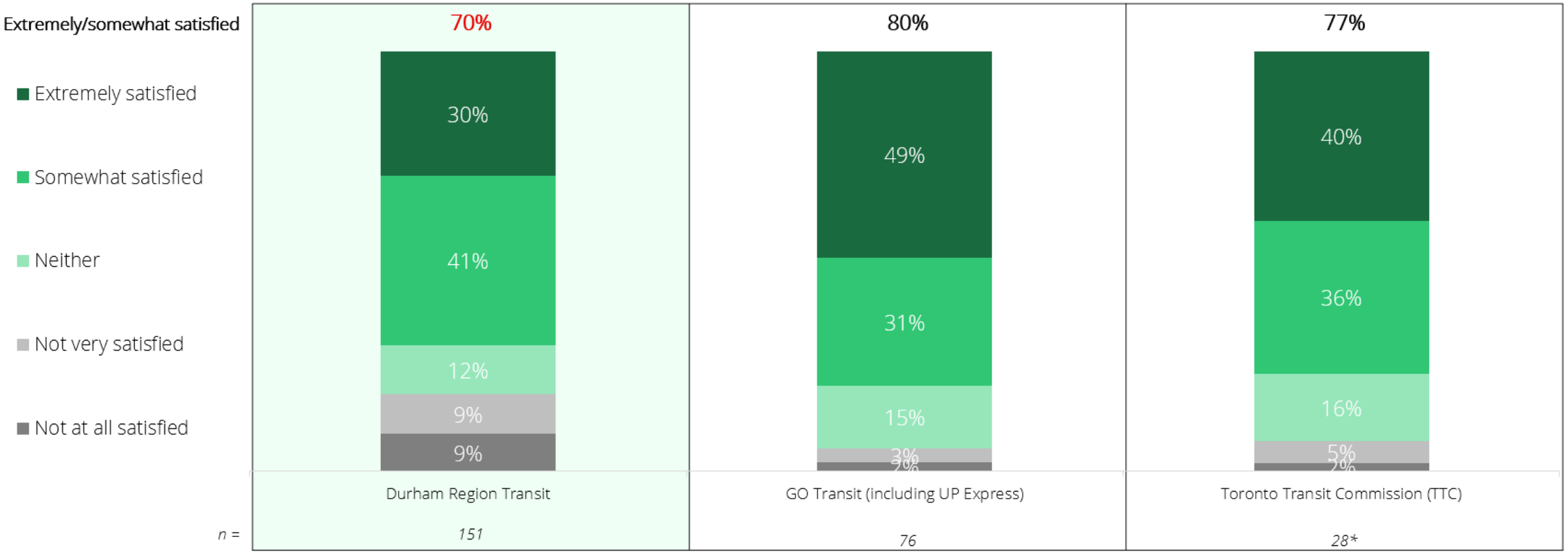
Q28. And why would you say you were (INSERT RESPONSE FROM Q27) with your most recent trip – specifically thinking about the mode of transportation you used? Please type in your response below and be as specific as possible.

Compared with other transportation options, DRT trails in terms of satisfaction, particularly vs. GO with nearly half of riders reporting being extremely satisfied with their most recent experience (versus 30% for DRT).

*Of the 244 people who took public transit for their most recent trips, **83%** used DRT, **45%** used GO Transit and **23%** used TTC.*

Satisfaction with public transit used for the most recent trip

Base: Those who used each public transit for their most recent trip

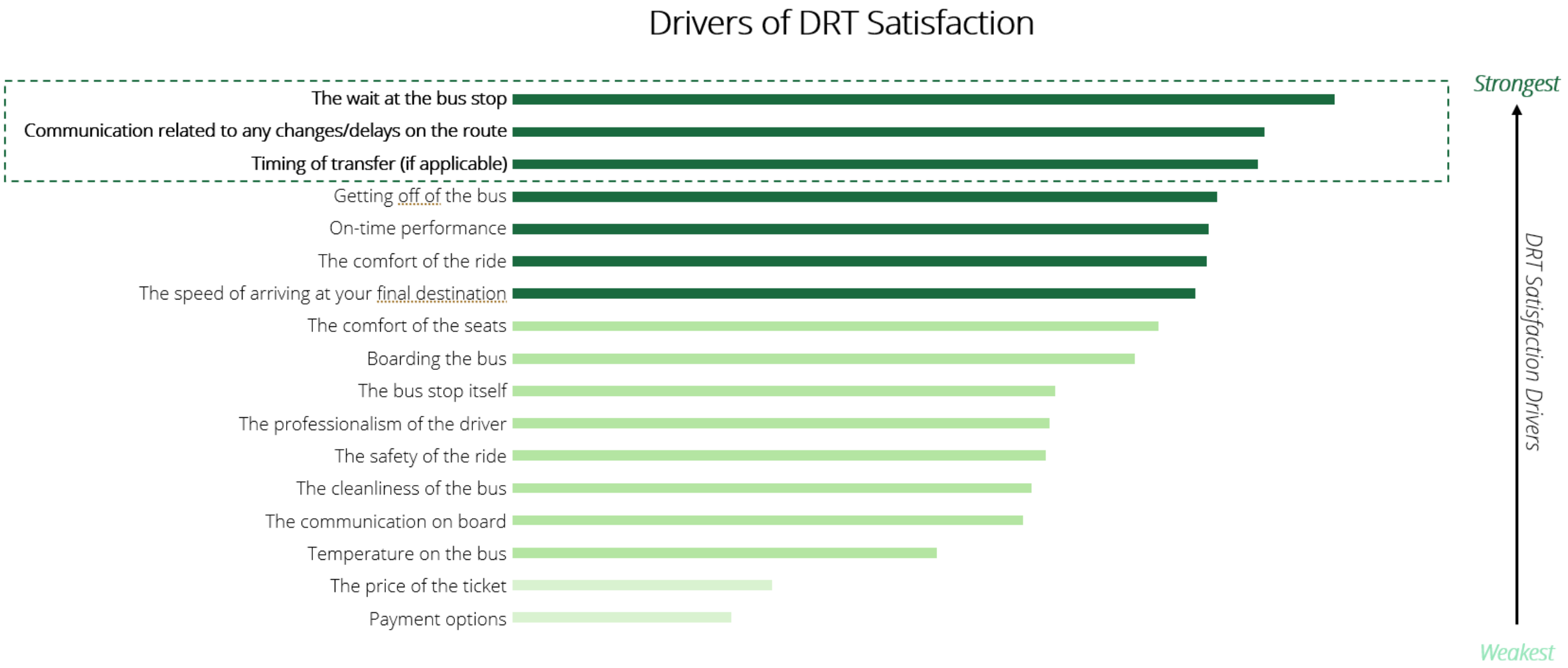


Q27. How satisfied were you with the transportation mode you used during this most recent trip?

Note: statistical testing is among the three transportation modes.

Which DRT elements drive satisfaction?

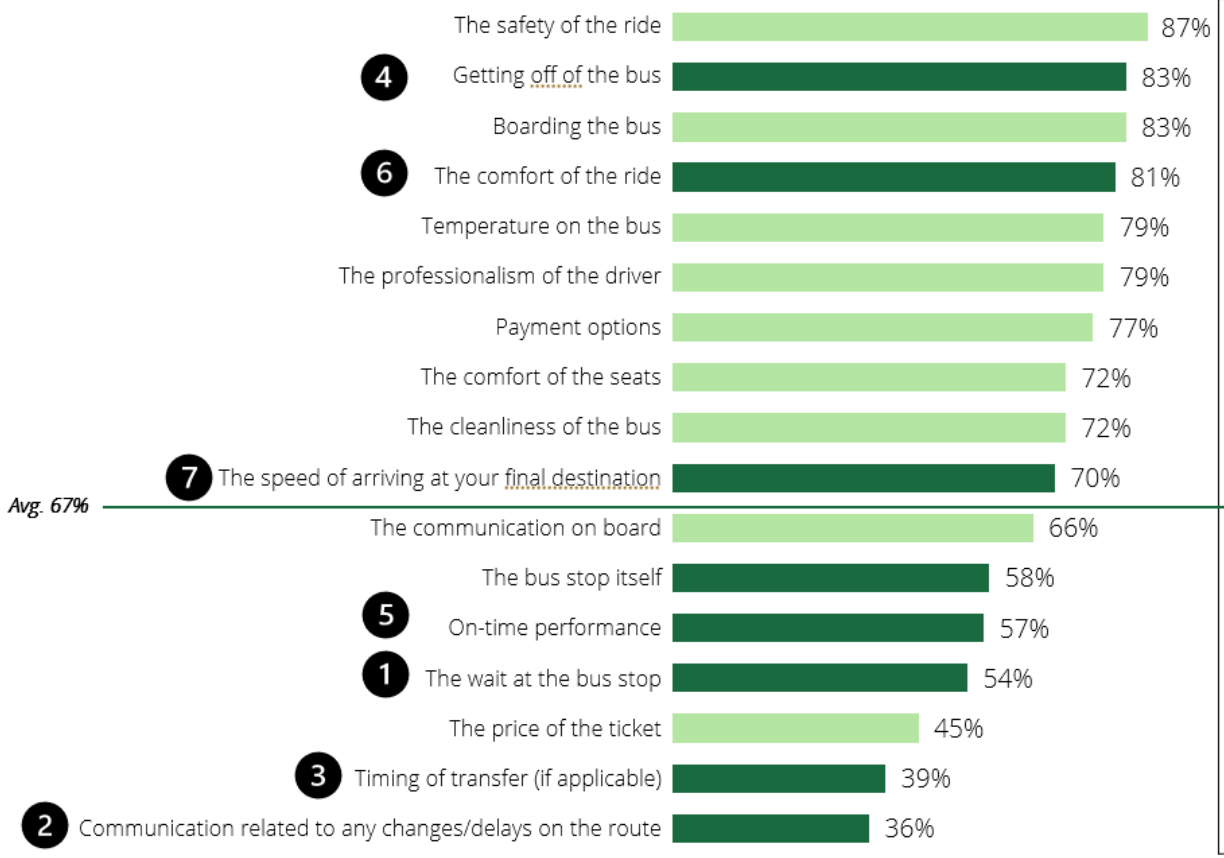
Key drivers of DRT satisfaction center on timing – wait times, delay communication, transfer timing, punctuality, and ride speed – *highlighting areas to prioritize for improving the rider experience.*



Those who used DRT for the most recent trip are most satisfied with safety, boarding, and ride comfort. However, several key drivers of satisfaction underperform, such as delay communication, transfer timing, and wait times. The major rider group (students aged 16–24) reports lower satisfaction with wait times and on-time performance. Interestingly, infrequent riders express overall higher satisfaction, ***suggesting DRT may struggle with consistency, impacting frequent riders more.***

Satisfaction with most recent DRT trip–across key factors (T2B)

% very/somewhat satisfied Base: Those who used DRT for their most recent trips n=151



	Ridership		Age		
	Recent Riders	Infrequent Riders	16-24 Student	18-69 Employed	60+
	104	12*	92	250	13*
The safety of the ride	84%	94%	91%	87%	77%
Getting off of the bus	84%	82%	78%	85%	69%
Boarding the bus	85%	94%	79%	82%	75%
The comfort of the ride	80%	90%	79%	81%	76%
Temperature on the bus	78%	87%	80%	78%	63%
The professionalism of the driver	79%	89%	84%	78%	69%
Payment options	80%	91%	70%	80%	63%
The comfort of the seats	69%	90%	77%	71%	66%
The cleanliness of the bus	74%	80%	68%	75%	71%
The speed of arriving at your final destination	70%	76%	71%	69%	79%
The communication on board	66%	70%	71%	69%	40%
The bus stop itself	58%	72%	61%	58%	57%
On-time performance	59%	62%	45%	60%	72%
The wait at the bus stop	54%	58%	41%	55%	66%
The price of the ticket	49%	73%	37%	47%	63%
Timing of transfer (if applicable)	35%	47%	36%	43%	16%
Communication related to any changes/delays on the route	33%	46%	33%	37%	16%

*only showing data for trip purpose with base size >30

*only showing data for trip purpose with base size >30

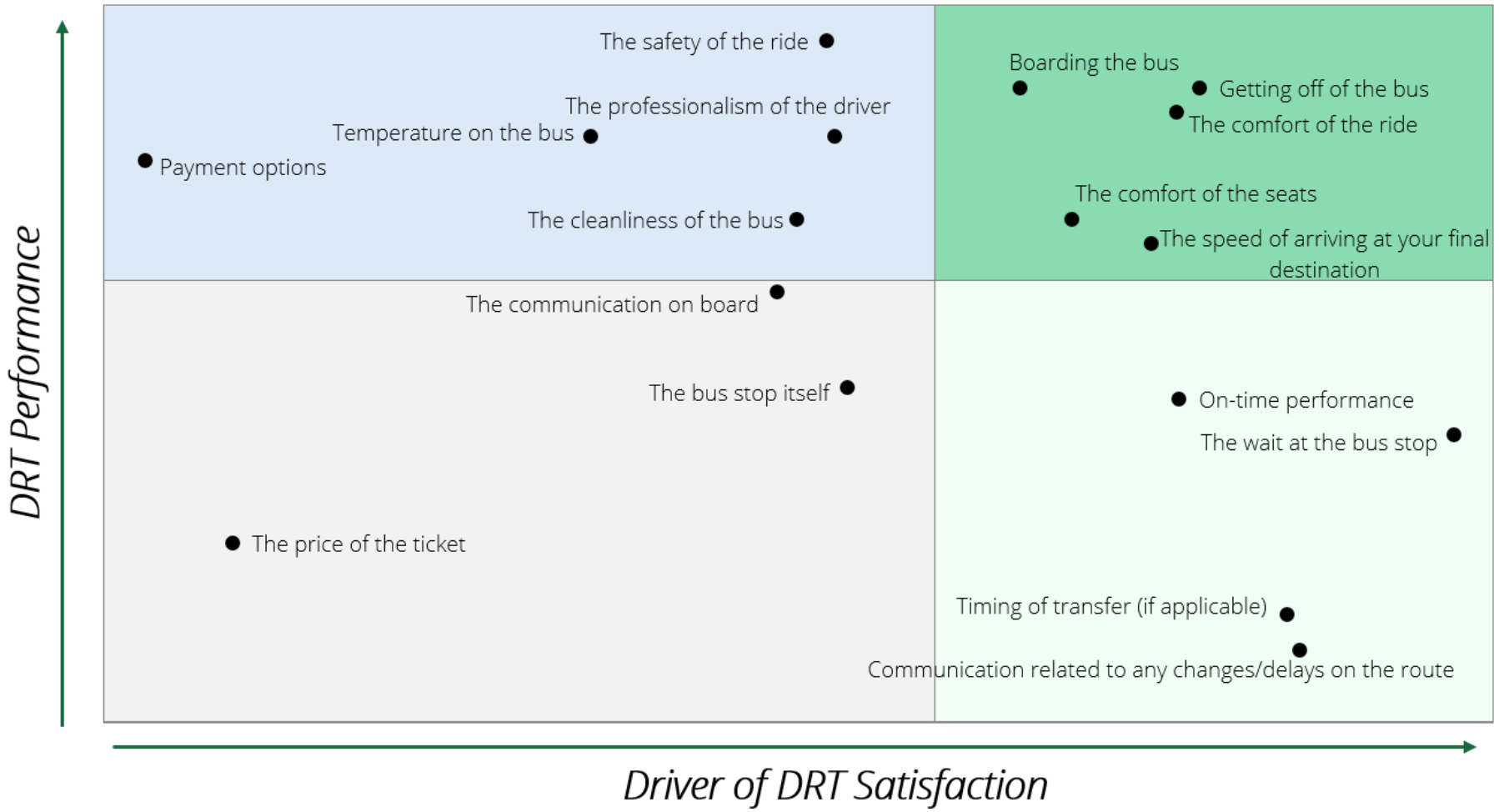
Q31. How satisfied were you with the following specific elements of your most recent trip on Durham Region Transit?

*Infrequent riders and 60+ are shown despite low weighted bases; unweighted bases (n=44 and n=43) support directional reporting.

*Includes all 60+, regardless of employment status, due to low base among 60+ retirees.

DRT performs well on key drivers like boarding, comfort, and speed, but *improving on-time performance, wait times, transfer timing, and delay communication could significantly boost overall satisfaction.*

Among those who used DRT for their most recent trips n=151



Cherish Above average performance, but lower importance	**Maintain** Above average performance, and higher importance
Low priority Below average performance, and lower importance	**Invest** Below average performance, but higher importance

TRIP BEHAVIOUR: PAST WEEK TRIPS

In past-week trips, running errands, shopping, and work emerge as the top three purposes. DRT recent riders are most likely to travel for work and school, while non-riders are heavily skewed toward trips for errands such as grocery shopping or dry cleaning. Retirees aged 60+ are more likely to take trips for shopping and appointments.

Trips taken in the past week – by purpose

Base: Total n=788

	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
	130	51	608	63	482	150
Running errands (grocery shopping, dry cleaning, etc.)	27%	55%	65%	30%	55%	74%
Shopping/retail	31%	53%	62%	23%	54%	68%
Work	62%	54%	49%	24%	81%	4%
Social (visiting friends or family at their home)	22%	35%	38%	32%	32%	41%
Attend a doctor's appointment (including dentist)	15%	26%	36%	19%	26%	56%
Entertainment (going out to dinner, attending movies)	13%	24%	32%	13%	28%	33%
Attend a personal appointment (nails, hair salon, etc.)	15%	21%	30%	12%	28%	40%
To go to the gym/recreation	13%	11%	22%	20%	22%	19%
To drop off a child at school/day care/recreation	5%	19%	19%	0%	20%	9%
Attend school	34%	13%	8%	90%	7%	0%
To volunteer	5%	9%	7%	4%	4%	9%

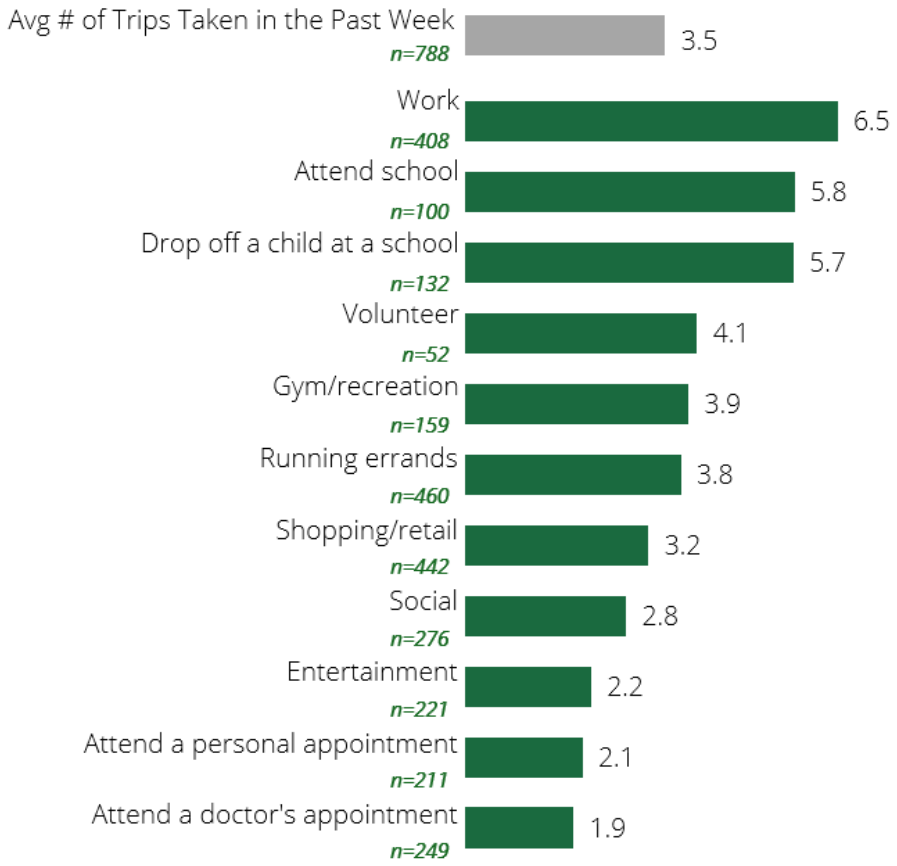
Q12. In the past week, how many trips would you say you took for the following purposes? Please count each way as a single trip. In other words, if you went from your home to school and then back home, that would count as two trips.

*Small base size. Interpret with caution

In the past week trips, work is the most common trip purpose, followed by school-related travel. Non-DRT riders report slightly more weekly trips than DRT users, with work and school as top destinations – *highlighting a strong opportunity for DRT to attract these travelers by addressing their commuting needs.*

Avg. # of trips taken in the past week – by purpose

Base: Varied base per different purpose of the trips made in the past week



Ridership			Age		
Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
2.4 *130*	3.2 *51*	3.7 *608*	2.7 *63*	3.6 *482*	3.6 *150*
6.5 *81*	5.8 *27**	6.6 *299*	3.9 *15**	6.7 *389*	2.8 *7**
5.8 *44*	5.5 *7**	5.2 *49*	6.7 *57*	5.7 *33*	2.0 *0**
5.7 *6**	5.2 *10**	5.8 *116*	2.8 *0**	5.6 *96*	4.9 *13**
4.1 *6**	3.4 *5**	4.2 *41*	2.6 *3**	3.8 *19**	5.4 *14**
3.9 *17**	2.9 *6**	4.0 *136*	5.7 *13**	3.7 *106*	3.5 *28**
3.8 *35*	3.3 *28**	3.9 *398*	2.6 *19**	3.9 *266*	3.1 *112*
3.2 *41*	3.2 *27**	3.2 *374*	3.6 *15**	3.2 *260*	3.2 *103*
2.8 *29**	2.4 *18**	2.9 *229*	3.2 *20**	2.9 *155*	3.0 *61*
2.2 *17**	2.6 *12**	2.2 *192*	3.0 *9**	2.4 *134*	1.7 *50*
2.1 *19**	1.9 *11**	2.1 *181*	2.2 *8**	2.0 *135*	2.0 *60*
2.4 *20**	2.1 *13**	1.8 *216*	2.3 *12**	2.0 *128*	1.6 *85*

Q12. In the past week, how many trips would you say you took for the following purposes? Please count each way as a single trip. In other words, if you went from your home to school and then back home, that would count as two trips.

*Small base size. Interpret with caution

With the exception of attending school, personal vehicles are the top mode of transportation across all occasions. Nearly one-quarter of those who live/work in Durham did use public transit to commute to/from work; for most other trip purposes, ~10% take public transit. The main exception is when dropping a child off at school – only 2% use public transit for this purpose.

Top trip purposes for each transportation mode - past week trips

Base: varies per the purpose of trip taken

How to read this chart:
3% *of those who traveled to work in the past week walked, while* ***58%*** *drove themselves (personal vehicle as a driver).*

	Work	Attend school	Drop off a child at a school	Volunteer	Gym/recreation	Attend a personal appointment	Attend a doctor's appointment	Shopping/retail	Entertainment	Running errands	Social
Walk	3%	12%	10%	11%	7%	4%	3%	4%	2%	4%	6%
Personal vehicle (as a driver)	58%	20%	80%	54%	66%	71%	63%	67%	62%	68%	63%
Personal vehicle (as a passenger)	10%	5%	7%	14%	11%	12%	19%	16%	21%	17%	16%
Rideshare (e.g., Uber, Lyft	2%	0%	0%	4%	2%	2%	2%	3%	3%	2%	5%
Public Transit	25%	63%	2%	11%	13%	9%	10%	9%	11%	7%	10%
n	*408*	*100*	*132*	*52*	*159*	*211*	*249*	*442*	*221*	*460*	*276*

Q13. Still thinking about the past week, for each of the following trips, what mode of transportation did you use? If you used multiple modes of transportation when travelling to/from your destination, please select the primary mode used.

*Small base size. Interpret with caution

Trips related to errands, gym, personal appointments and errands (including shopping) tend to be local while other trip purposes (particularly work and school) extend into Toronto. Interestingly, nearly 50% report that their volunteering and social plans tend to happen within the region but outside of their city – ***suggesting a communication opportunity for DRT.***

Modes taken for most recent trip (by purpose)

Base: Those taking the following trips in the most recent trip n = 788

	Work	Attend school	Drop off a child at a school	Gym/recreation	Attend a personal appointment	Attend a doctor's appointment	Shopping/retail	Entertainment	Running errands	Social
Personal vehicle (as the driver)	53%	11%	86%	78%	80%	59%	70%	66%	67%	67%
Public Transit	36%	76%	3%	8%	8%	16%	7%	20%	6%	19%
Walk	17%	21%	2%	8%	5%	13%	11%	11%	11%	14%
Personal vehicle (as a passenger)	14%	13%	6%	18%	12%	17%	22%	15%	23%	18%
Rideshare (e.g., Uber, Lyft)	6%	2%	1%	2%	5%	2%	4%	4%	5%	11%
n	230	66	46	52	61	82	169	72	194	49

**only showing data for trip purpose with base size >30*

Among those who took DRT in the past week, most destinations were within their own city; the main exceptions are work which is most likely to be located within the region but not in their own city.

Destination Location for Past Week Trips

Base: **People who took DRT for their past week trip**

Example for interpretation: ***28%*** *of those who traveled to work and took DRT in the past week had destination in their city, while* ***45%*** *was in Durham Region (not their cities).*

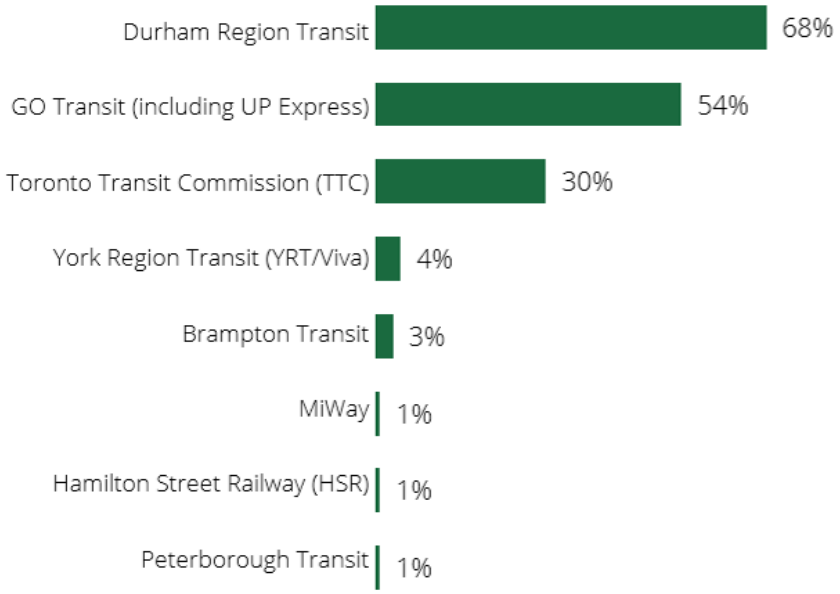
	Work	Attend school	Shopping/retail	Running errands
In your city	28%	42%	65%	71%
In Durham region (not your city)	45%	28%	30%	21%
In Toronto	26%	29%	4%	2%
n	*83*	*43*	*46*	*45*

**only showing data for trip purpose with base size >30*

Among those who took public transit in the past week, DRT leads followed by GO Transit. Among those who took DRT in the past week, over half report multi-public-transit connections – particularly with GO Transit.

Public transit used in the past week

Base: Those who used public transit in the past week n=196



	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
	111	15*	70	43	129	10*
Durham Region Transit	100%	0%	0%	70%	71%	47%
GO Transit (including UP Express)	47%	49%	66%	54%	55%	55%
Toronto Transit Commission (TTC)	23%	28%	42%	43%	30%	8%
York Region Transit (YRT/Viva)	3%	5%	7%	3%	3%	0%
Brampton Transit	1%	0%	7%	0%	4%	0%
MiWay	2%	0%	0%	2%	0%	0%
Hamilton Street Railway (HSR)	1%	2%	0%	3%	0%	0%
Peterborough Transit	1%	2%	0%	4%	0%	0%

Multi-public-transit connections in past week

Base: Total n=788

	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
	130	51	608	63	482	150
Yes	54%	24%	12%	49%	23%	4%
No	46%	76%	88%	51%	77%	96%

Q15. Which public transit services did you use in the past week? 16. Did you have to connect to multiple forms of public transit?

*Small base size. Interpret with caution

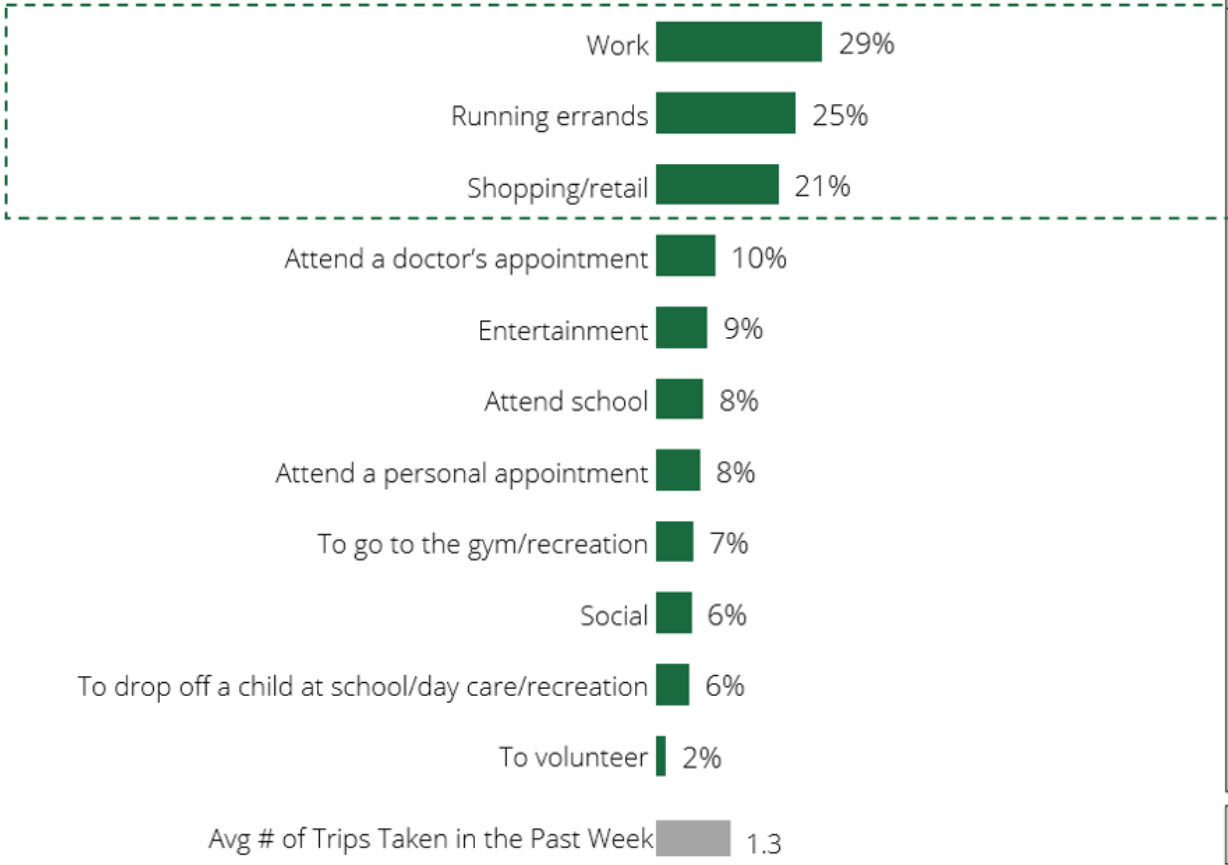
TRIP BEHAVIOUR: MOST RECENT TRIP

WITHIN DURHAM REGION

Similar to past-week trips, running errands, shopping, and work remain the top three purposes for the most recent trip. However, among recent DRT riders, running errands and entertainment take the lead—unlike past-week patterns where work and school are more common. Notably, students aged 16–24 are significantly more likely to cite entertainment as the purpose of their most recent trip.

Most Recent Trip – by purpose

Base: Total n=788



	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+ Retired
	130	51	608	63	482	150
Work	52%	32%	24%	13%	46%	0%
Running errands	5%	14%	30%	7%	18%	43%
Shopping/retail	8%	15%	25%	5%	18%	32%
Attend a doctor's appointment	5%	11%	12%	8%	7%	18%
Entertainment	5%	7%	10%	3%	10%	8%
Attend school	27%	10%	4%	74%	4%	0%
Attend a personal appointment	1%	3%	10%	4%	6%	16%
To go to the gym/recreation	4%	1%	8%	6%	6%	6%
Social	7%	10%	6%	7%	5%	3%
To drop off a child at school/day care/recreation	2%	9%	6%	0%	7%	4%
To volunteer	2%	3%	2%	0%	1%	4%
Avg # of Trips Taken in the Past Week	1.2	1.2	1.4	1.3	1.3	1.4

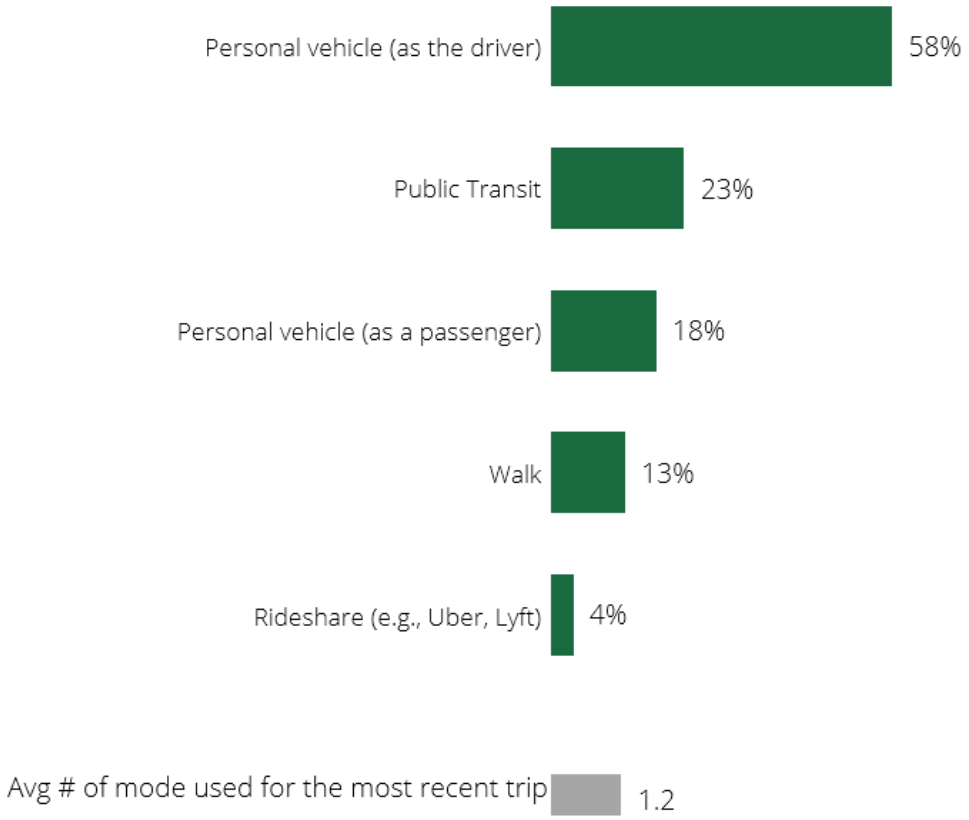
Q19. What would you say was the purpose of this most recent trip within Durham Region? If your trip included multiple purposes/destinations in that single "trip" (for example, if you dropped a child off on your way to work), you would select two purposes below), please select all that apply.

*Small base size. Interpret with caution

Personal vehicle (as the driver) is the most common mode for the most recent trip, largely driven by non-riders. Nearly 9 in 10 recent DRT riders used public transit, and they also skew higher on walking and rideshare compared to infrequent or non-riders. Similarly, students aged 16–24 are more likely to use public transit and walk.

Mode of transit used for the most recent trip

Base: total n=788



	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+
	130	51	608	63	482	223
Personal vehicle (as the driver)	7%	56%	69%	16%	60%	66%
Public Transit	89%	31%	8%	66%	23%	9%
Personal vehicle (as a passenger)	10%	14%	20%	18%	16%	23%
Walk	27%	14%	9%	26%	12%	10%
Rideshare (e.g., Uber, Lyft)	10%	6%	2%	3%	5%	0%
Avg # of mode used for the most recent trip	*1.4*	*1.2*	*1.1*	*1.3*	*1.2*	*1.1*

Q20. What mode of transit did you use on this most recent trip in the region? If you used more than one mode of transportation, please select all that apply.

*Small base size. Interpret with caution

Driving is the dominant mode for most trip purposes, especially for dropping kids off at school, personal appointments, and gym/recreation. Public transit over indexes for commuting to school and work, while under indexing for errands, shopping, personal appointments and recreation. ***Public transit also features modestly for social and entertainment trip purposes, suggesting opportunity areas to steal more share of trips in the region.***

Modes taken for most recent trip (by purpose)

Base: Those taking the following trips in the most recent trip n = 788

	Work	Attend school	Drop off a child at a school	Gym/recreation	Attend a personal appointment	Attend a doctor's appointment	Shopping/retail	Entertainment	Running errands	Social
Personal vehicle (as the driver)	53%	11%	86%	78%	80%	59%	70%	66%	67%	67%
Public Transit	36%	76%	3%	8%	8%	16%	7%	20%	6%	19%
Walk	17%	21%	2%	8%	5%	13%	11%	11%	11%	14%
Personal vehicle (as a passenger)	14%	13%	6%	18%	12%	17%	22%	15%	23%	18%
Rideshare (e.g., Uber, Lyft)	6%	2%	1%	2%	5%	2%	4%	4%	5%	11%
n	230	66	46	52	61	82	169	72	194	49

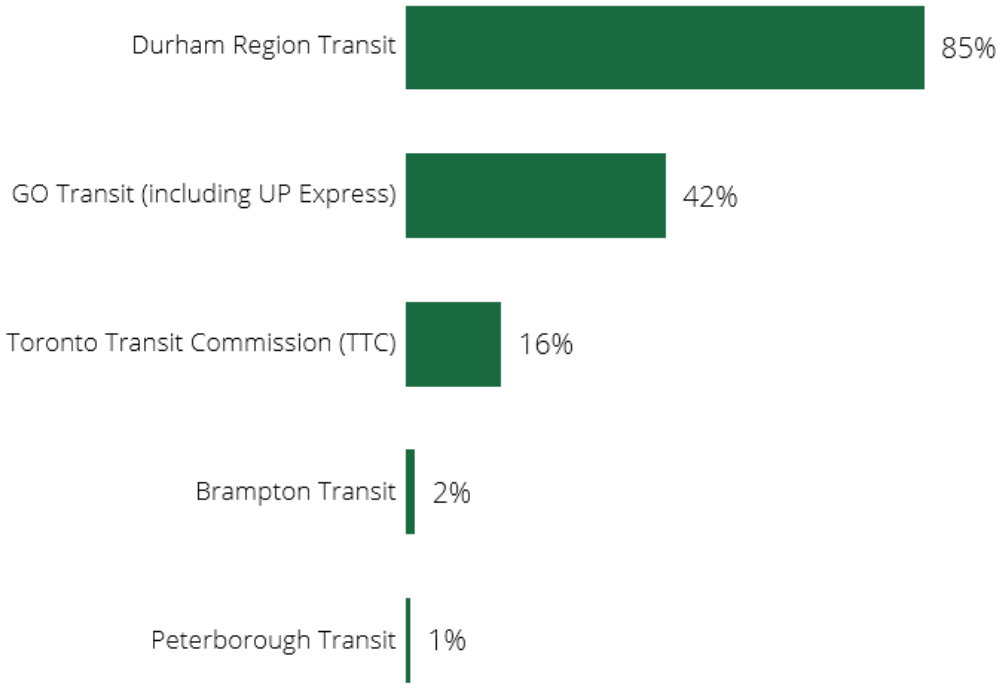
Q19. What would you say was the purpose of this most recent trip within Durham Region? If your trip included multiple purposes/destinations in that single "trip" (for example, if you dropped a child off on your way to work), you would select two purposes below), please select all that apply. | Q20. What mode of transit did you use on this most recent trip in the region? If you used more than one mode of transportation, please select all that apply.

*Small base size. Interpret with caution

Among those whose most recent trip involved public transit, DRT is the most used service, followed by GO Transit — aligning with patterns seen in past-week usage.

Public transit used for the most recent trip

Base: Those who used public transit for their for their most recent trip n=179



	Ridership			Age		
	Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+
	115	16*	48	42	113	21*
Durham Region Transit	90%	0%	0%	91%	88%	64%
GO Transit (including UP Express)	34%	46%	62%	43%	41%	46%
Toronto Transit Commission (TTC)	15%	27%	14%	28%	14%	3%
Brampton Transit	0%	0%	5%	0%	2%	0%
Peterborough Transit	1%	0%	0%	3%	0%	0%

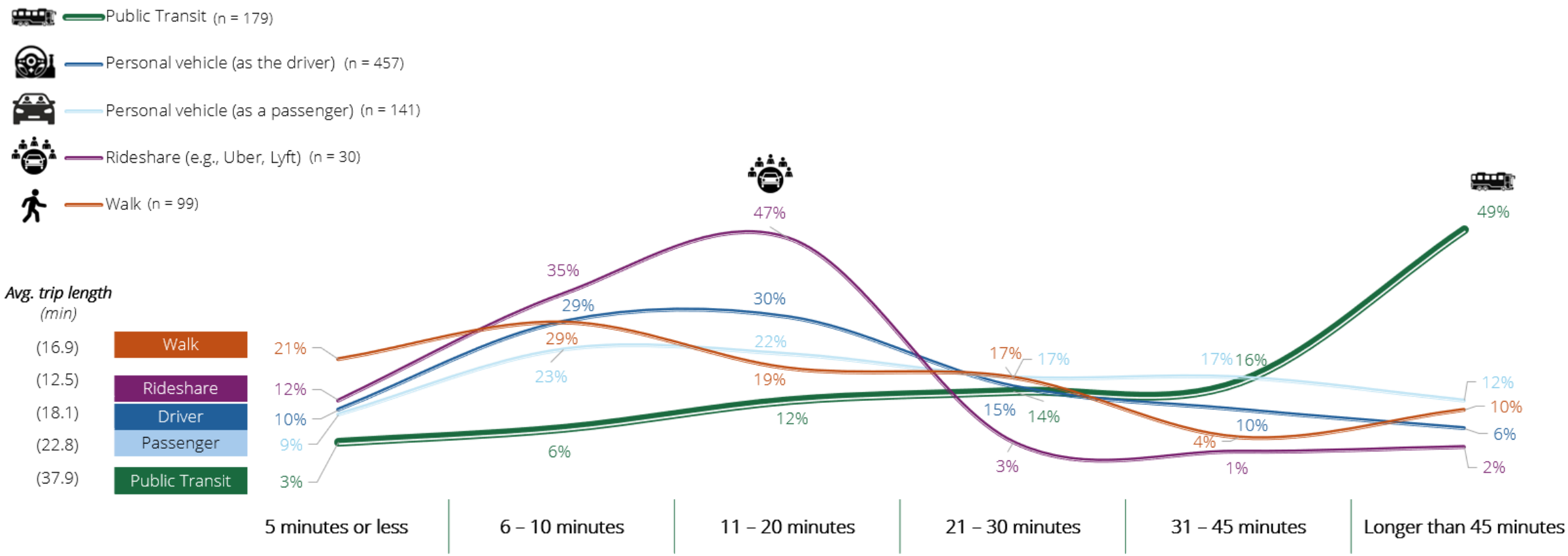
Q22. What mode of transit did you use on this most recent trip in the region? If you used more than one mode of transportation, please select all that apply.

*Small base size. Interpret with caution

Public transit features strongly for longer trips that are over 45 minutes. Mode usage varies more widely in the context of medium-length trips, especially between 6-20 minutes. *There is likely opportunity for DRT to feature more strongly here, where rideshare apps tend to dominate, followed by driving.*

Travel time of the most recent trip – by transportation mode

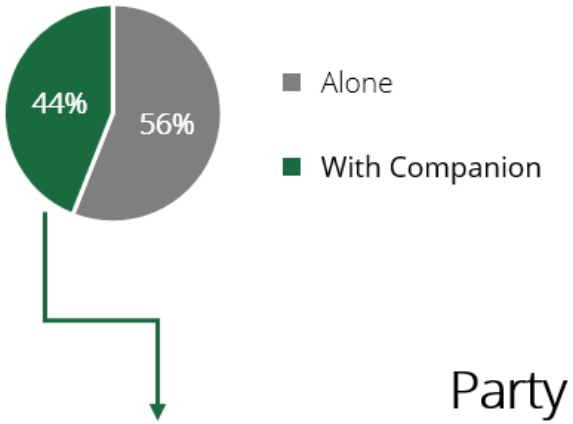
Base: Those who used each transportation mode on the most recent trip



Those traveling by personal vehicle are more likely to have a companion (51%) compared to public transit users (41%) and walkers (26%).

Travel Companion for the most recent trip

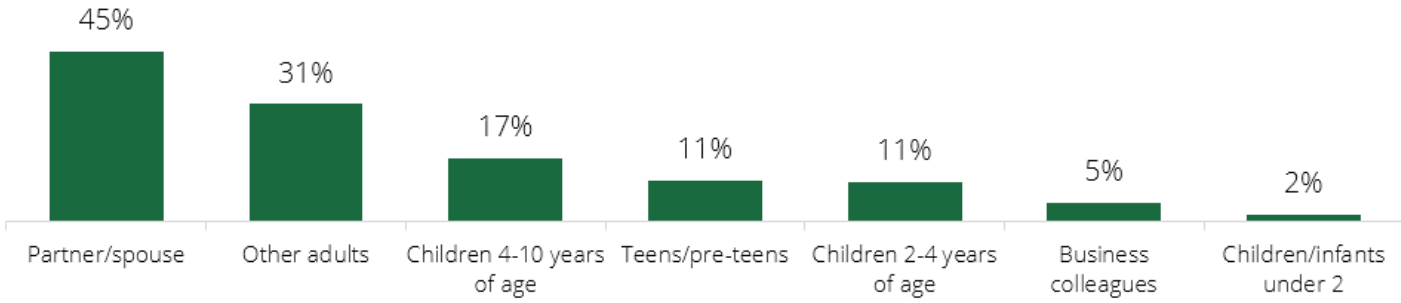
Base: Total n=788



Mode – most recent trip			Age		
Public Transit	Personal Vehicle (driver or passenger)	Walk	16-24 Student	18-69 Employed	60+
179	597	99	63	482	223
59%	49%	74%	72%	56%	38%
41%	51%	26%	28%	44%	62%

Party size for the most recent trip

Base: Riders who travelled with a companion n= 345



1.4
Avg. # of Companions riders travel with

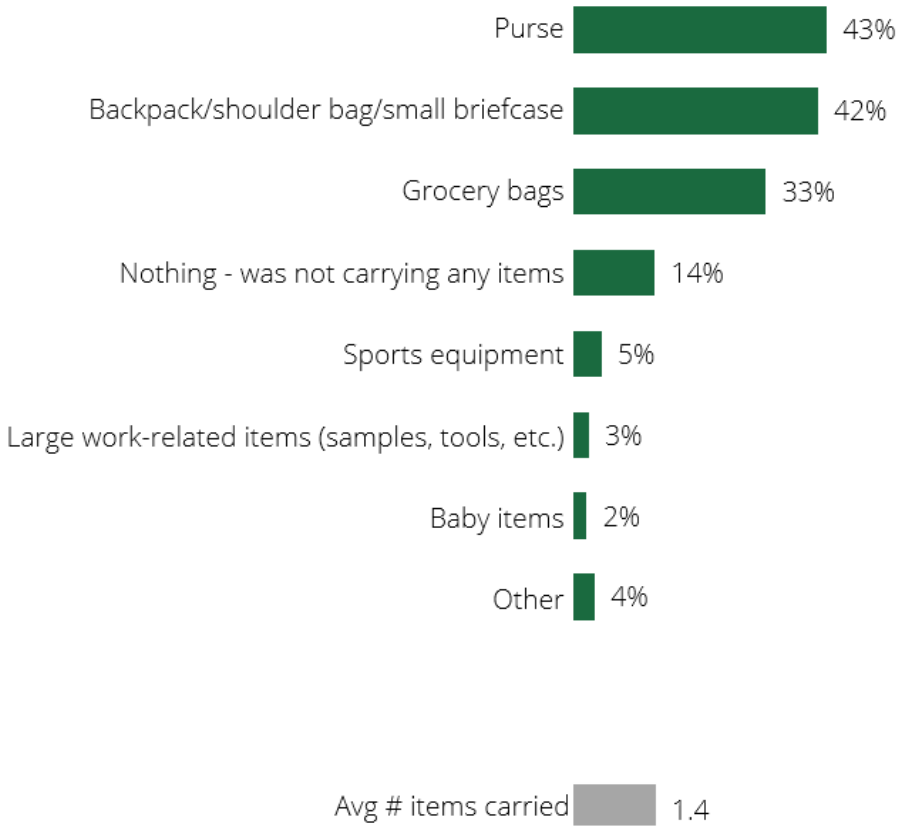
Q23. How many individuals did you travel with on this most recent trip?

*Small base size. Interpret with caution

Close to half of travelers carried a purse (43%) or backpack (42%) on their most recent trip. Backpacks, shoulder bags or brief cases are especially common for those who take public transit for their most recent trip– this lines up with the most common trip purposes being work and school where these types of bags are common.

Items carried for the most recent trip

Base: Total n=788



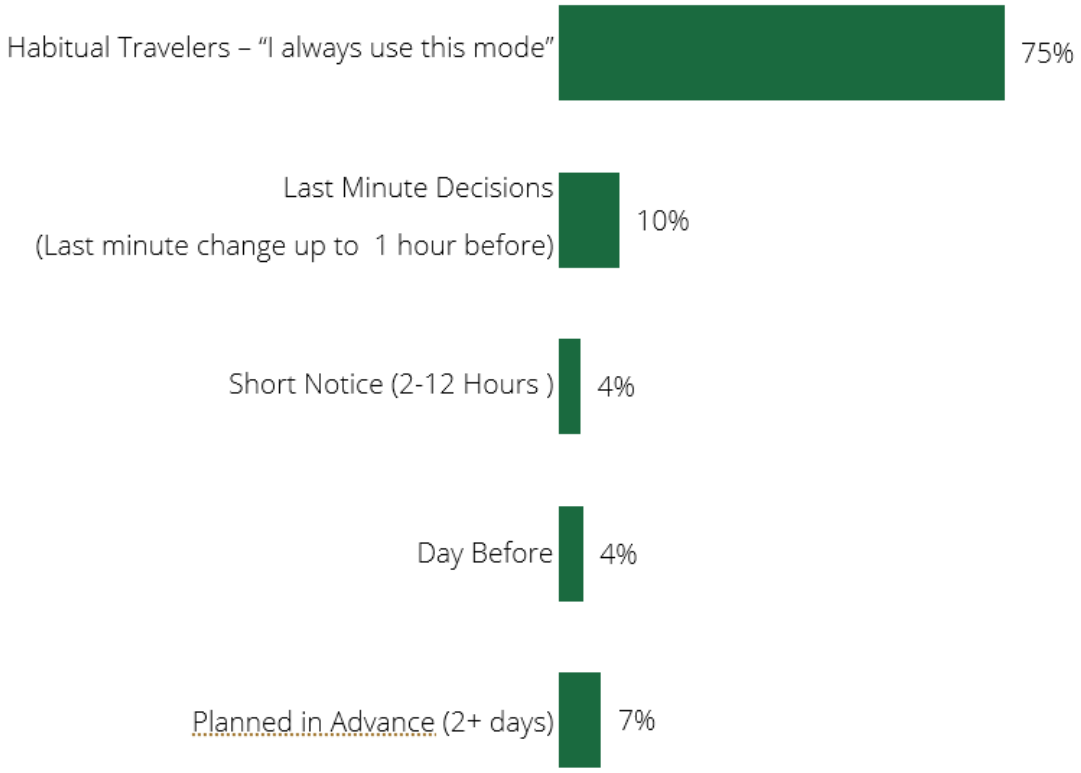
Mode – most recent trip			Age		
Public Transit	Personal Vehicle (driver or passenger)	Walk	16-24 Student	18-69 Employed	60+
179	577	99	63	482	223
21%	50%	31%	17%	41%	49%
82%	30%	66%	89%	48%	22%
11%	40%	23%	9%	29%	48%
6%	16%	11%	1%	12%	20%
3%	6%	4%	4%	5%	3%
3%	3%	1%	0%	4%	2%
1%	3%	0%	0%	3%	2%
0%	3%	1%	5%	2%	6%
1.3	*1.5*	*1.4*	*1.3*	*1.4*	*1.5*

Q24. Did you have any of the following items with you on this most recent trip?

Consistent with qualitative findings, mode choice is highly habitual—75% of travelers use the mode they typically rely on for that trip, with this pattern strongest among personal vehicle users (80%).

Advance preparation time for most recent trip

Base: Total n=788



	Mode – most recent trip			Age		
	Public Transit	Personal Vehicle (driver or passenger)	Walk	16-24 Student	18-69 Employed	60+
	179	577	99	63	482	223
Habitual Travelers – "I always use this mode"	64%	80%	63%	59%	75%	85%
Last Minute Decisions (Last minute change up to 1 hour before)	15%	7%	21%	20%	11%	4%
Short Notice (2-12 Hours)	8%	3%	4%	9%	4%	0%
Day Before	8%	3%	6%	4%	5%	3%
Planned in Advance (2+ days)	7%	8%	7%	7%	5%	8%

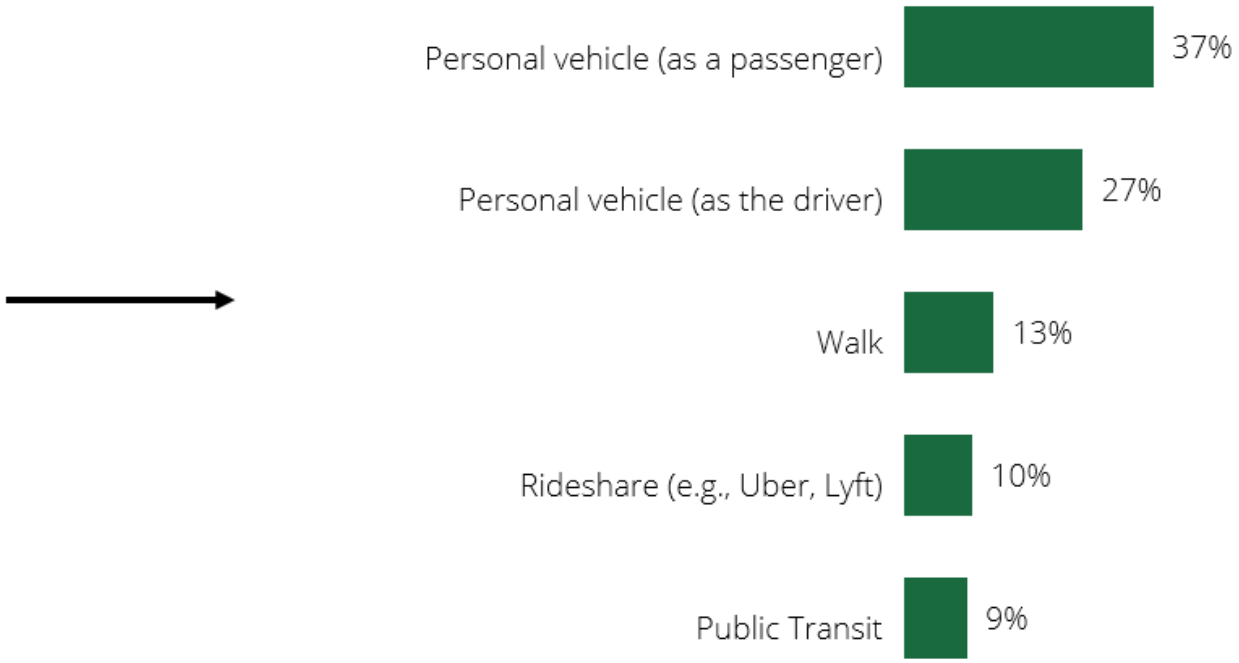
Q24b. How far in advance did you pick which transportation mode you were going to use for this trip?

Among the few travelers who made very last-minute changes to their travel plans, Personal vehicle (37%) was the most common originally intended mode that they switched away from.

Original mode of transit planned for the most Recent Trip

Base: Those who have last minute change of plans n=37

Among the **5%** of people who had a last-minute change of plans, these were the originally intended modes of transit



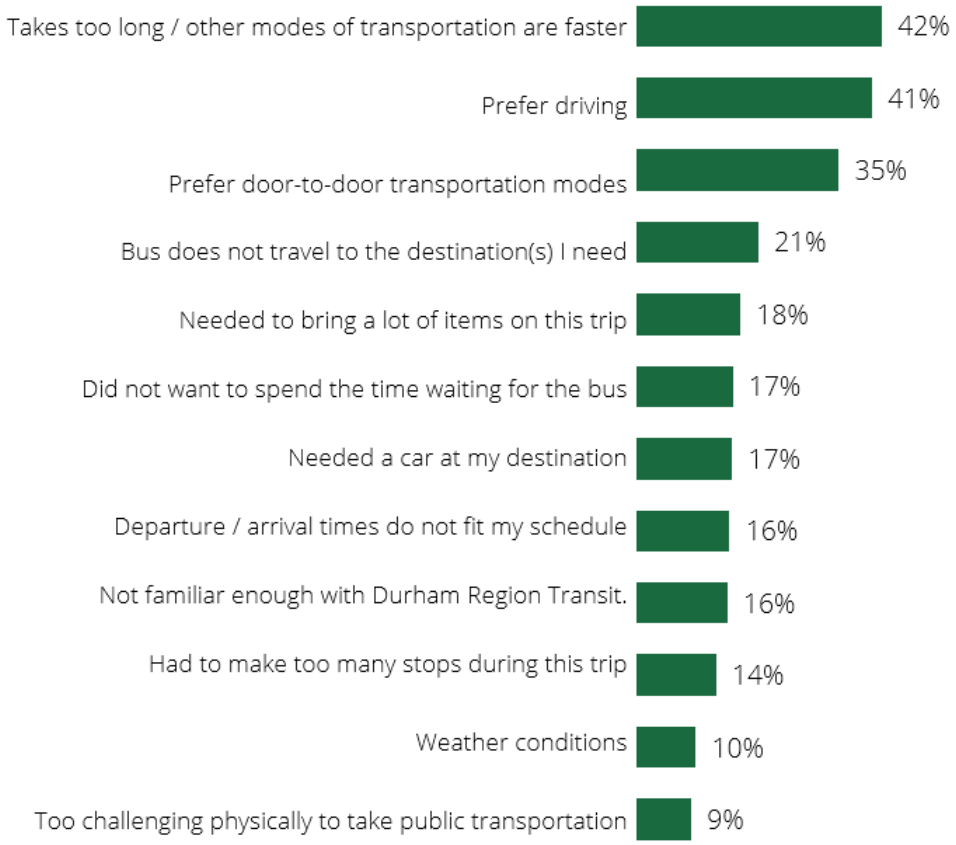
Note: breaks are not shown due to low base size

BARRIERS TO CONSIDERATION

The top reason for not using DRT is the perception that **other modes are faster** (42%), followed by preferring driving (41%).

Reasons not using DRT for the most recent trip

Base: Those who didn't use DRT for their most recent trip n=637



Ridership			Age		
Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+
10*	15*	213	7*	143	62
65%	38%	42%	48%	41%	38%
0%	34%	43%	0%	44%	34%
0%	20%	38%	31%	32%	41%
26%	12%	21%	6%	22%	30%
5%	20%	18%	31%	22%	12%
30%	32%	15%	15%	18%	18%
3%	14%	17%	50%	14%	21%
41%	48%	13%	42%	16%	13%
5%	20%	16%	6%	20%	14%
10%	6%	14%	0%	8%	28%
20%	9%	10%	8%	11%	10%
3%	2%	10%	3%	3%	17%

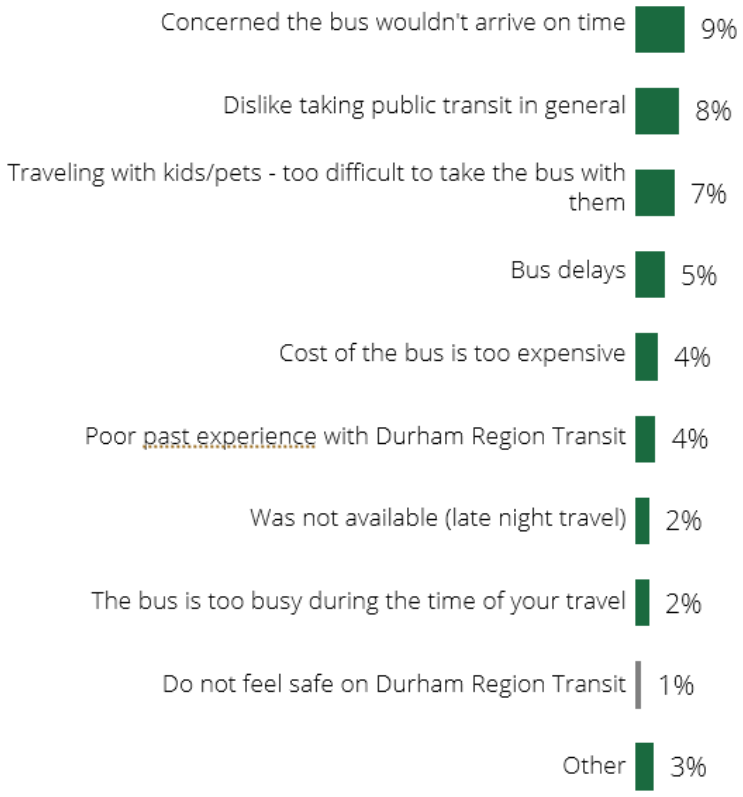
Q25. What would you say were the biggest reasons that you did not use Durham Region Transit for this most recent trip? Please check all that apply.

*Small base size. Interpret with caution

The least important reasons are don't feel safe on DRT and the bus is too busy during the time for the travel.

Reasons not using DRT for the most recent trip cont.

Base: Those who didn't use DRT for their most recent trip n=637



Ridership			Age		
Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+
10*	15*	213	7*	143	62
19%	19%	7%	7%	9%	9%
14%	0%	8%	0%	11%	0%
2%	5%	7%	0%	6%	0%
15%	0%	5%	17%	4%	9%
5%	2%	4%	0%	5%	0%
11%	3%	3%	10%	5%	0%
1%	15%	2%	0%	2%	0%
15%	0%	2%	18%	2%	0%
3%	2%	1%	0%	2%	0%
5%	0%	3%	7%	4%	4%

Q25. What would you say were the biggest reasons that you did not use Durham Region Transit for this most recent trip? Please check all that apply.

*Small base size. Interpret with caution

The top barriers to using DRT for the latest trip center on speed and flexibility—many opted for faster alternatives, preferred driving, or required door-to-door service—indicating convenience and schedule fit remain key hurdles to overcome.

Top-Ranked reason for not using DRT for the latest trip

Base: People who had 3+ reasons for not choosing DRT n=238

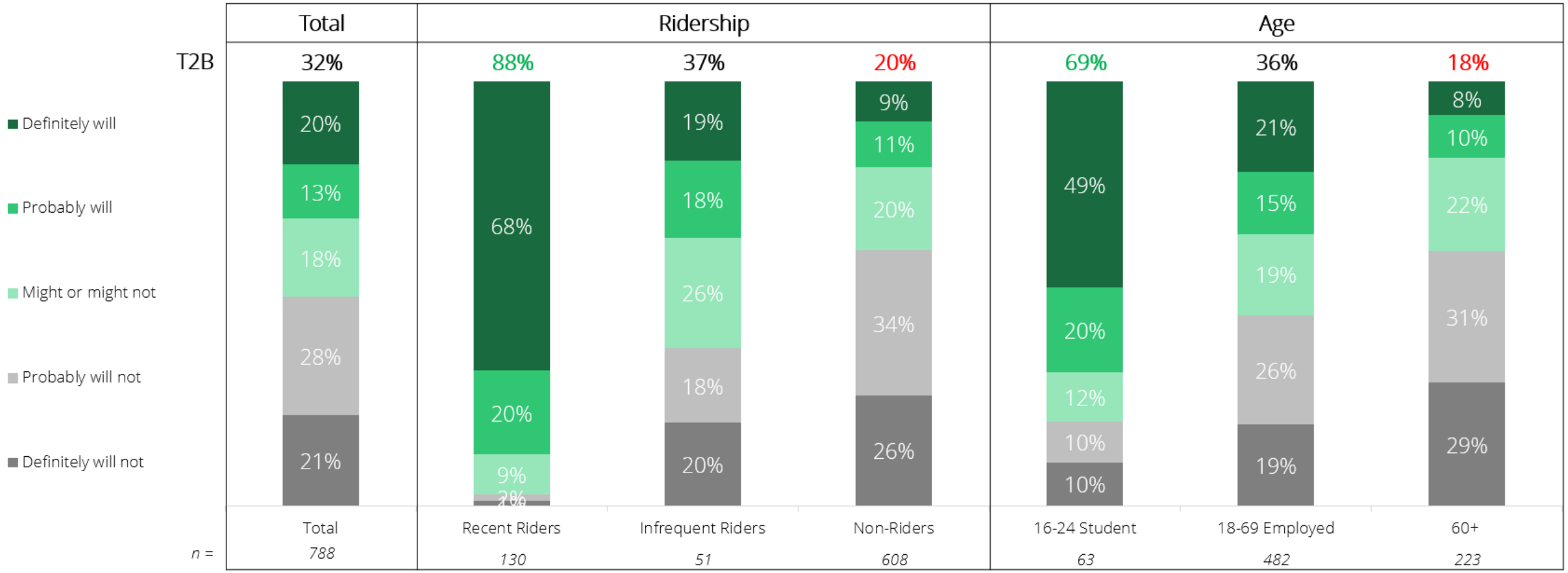
	1	2	3	RANK 1-3
Takes too long	11%	17%	15%	42%
Prefer driving	26%	12%	3%	41%
Prefer door-to-door transportation modes	8%	9%	18%	35%
Bus does not travel to the destination(s) I need	8%	10%	3%	21%
Needed to bring a lot of items on this trip	6%	7%	5%	18%
Did not want to spend the time waiting for the bus	3%	5%	8%	17%
Needed a car at my destination	3%	7%	7%	17%
Departure / arrival times do not fit my schedule	4%	7%	6%	16%
Not familiar enough with Durham Region Transit.	5%	4%	7%	16%
Had to make too many stops during this trip	6%	6%	2%	14%
Weather conditions	4%	2%	5%	10%
Too challenging physically to take public transportation	7%	1%	2%	9%

Q26. And of the reasons you selected as to why you didn't use Durham Region Transit on this most recent trip, what are the three top barriers, where #1 is the #1 reason why you didn't take Durham Region Transit, #2 is the second top reason for not taking Durham Region Transit and #3 is the third top reason for not taking Durham Region Transit.

When reflecting on their most recent trip, one-third of travelers would be open to taking DRT in the future, ***suggesting there is opportunity for acquisition particularly among employed adults.*** Seniors are the most likely to outright reject DRT for this trip purpose, ***suggesting converting this segment will be a challenge.***

Likelihood to take DRT in future for this exact type of trip

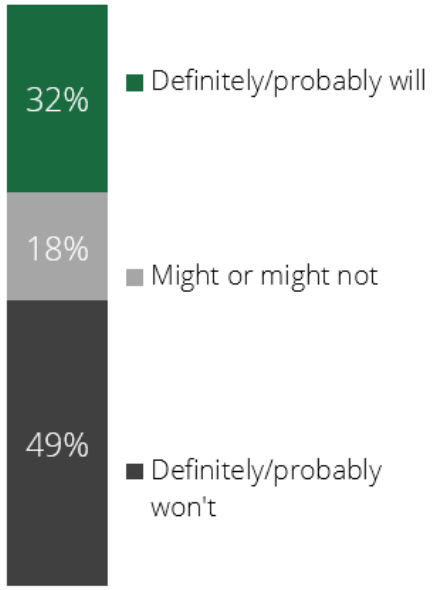
Base: Total n= 788



While half are open to using DRT for the same trip in the future, likelihood varies by purpose. Students show the highest interest (79%), while those running errands (63%) or seeking entertainment (49%) are more reluctant – aligning with broader trends in public transit usage by trip purpose.

Likelihood to take DRT in future for this exact type of trip – by purpose

Base: Those who selected each purpose for their most recent trip



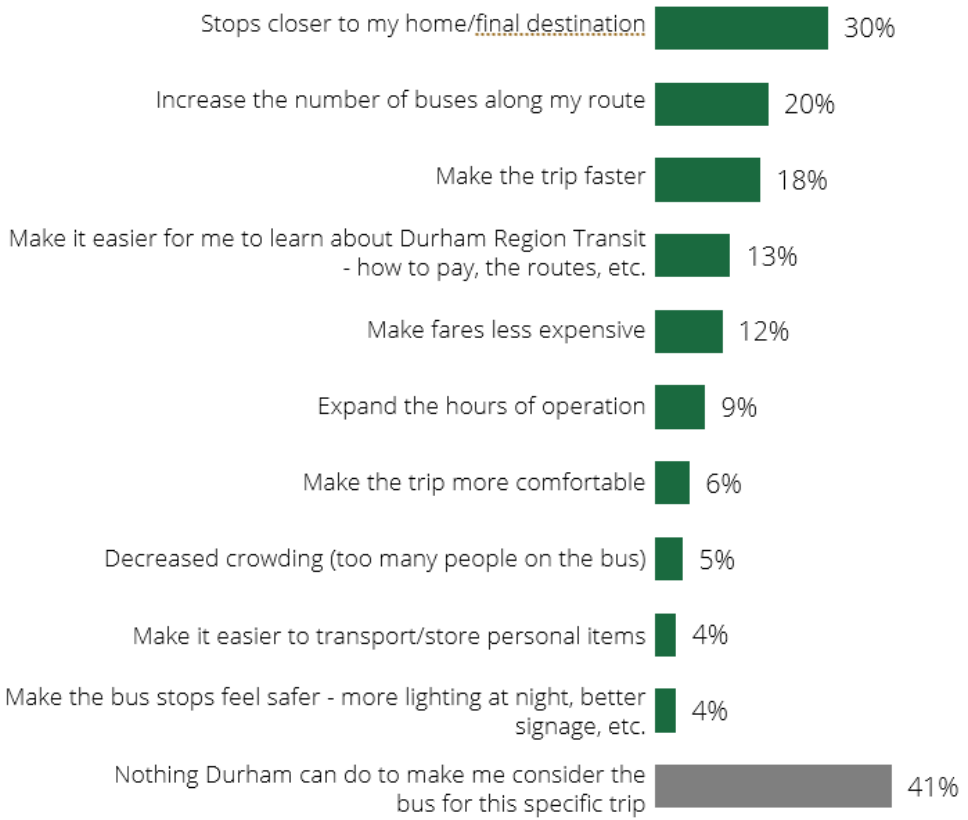
	Total	Work	Attend school	Drop off children	Gym or recreation	Attend a personal appointment	Attend a doctor's appointment	Shopping or retail	Entertainment	Running errands	Social
n=	788	230	66	46	52	61	82	169	72	194	49
Definitely/probably will	32%	44%	79%	24%	39%	38%	29%	29%	32%	24%	27%
Might or might not	18%	23%	10%	10%	9%	15%	30%	23%	20%	14%	14%
Definitely/probably won't	49%	33%	11%	67%	52%	48%	41%	48%	49%	63%	58%

only showing data for trip purpose with base size >30

Among those who would not be open to taking DRT for a trip identical to their most recent trip, the top recommendation is to have a stop closer to their home and/or final destination, ***confirming the importance of expanding coverage throughout the region.*** For recent riders, whose main reason for not taking DRT was due to timeliness concerns, their recommendations reflect this: increasing number of buses on the route, making the trip faster and expanding the hours of operation.

Improvements for DRT to motivate usage

Base: Those who might or might not, probably/definitely won't take DRT in future for this exact trip n= 533



Ridership			Age		
Recent Riders	Infrequent Riders	Non-Riders	16-24 Student	18-69 Employed	60+
16*	32	485	20*	309	183
21%	27%	31%	11%	28%	37%
37%	21%	19%	24%	23%	15%
39%	23%	18%	31%	21%	11%
0%	14%	14%	12%	14%	16%
17%	11%	12%	13%	13%	4%
26%	23%	7%	3%	11%	6%
15%	3%	6%	4%	8%	1%
16%	5%	5%	4%	5%	1%
9%	4%	4%	0%	3%	5%
3%	2%	4%	1%	4%	4%
15%	31%	43%	51%	40%	48%

Q30. What, if anything, could Durham Region Transit do differently for you to consider taking Durham Region Transit for this next trip?

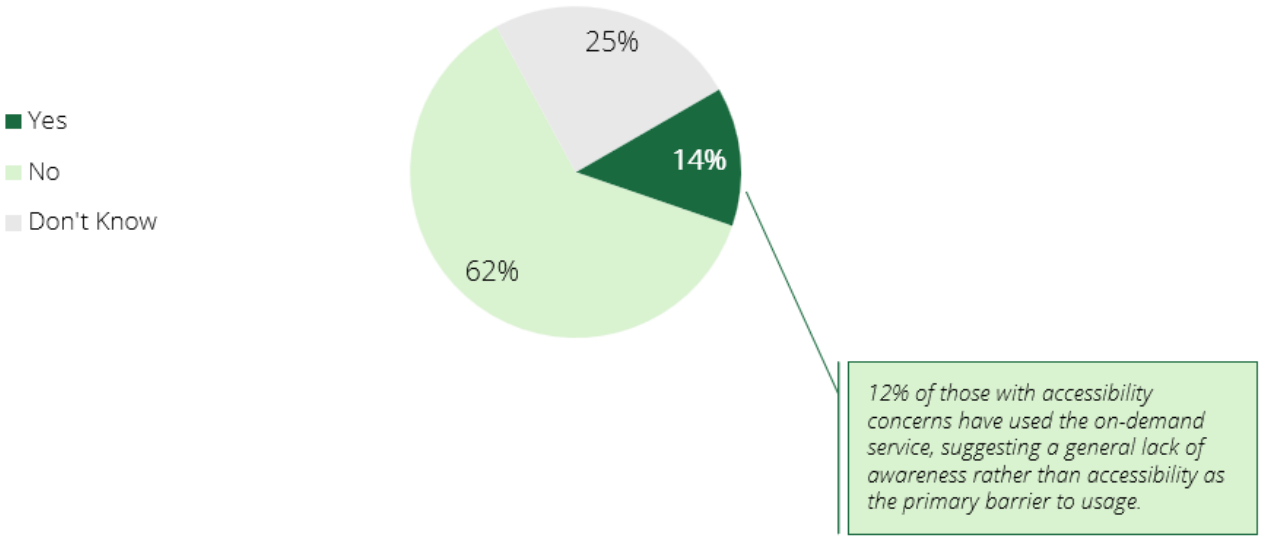
*Small base size. Interpret with caution

TRIP BEHAVIOUR: DOOR TO DOOR SERVICE

While most current DRT riders haven't used On Demand or Specialized Transit services, among those who have, usage tends to be recent – *highlighting the value these services provide when regular routes aren't operating.*

Usage of On-demand service when scheduled bus routes were not operating

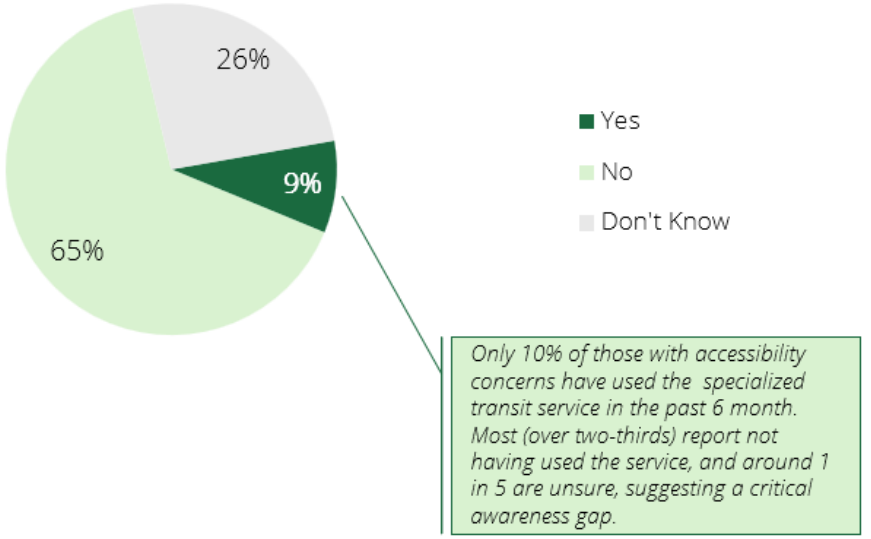
Base: Current DRT Customer n=180



12% of those with accessibility concerns have used the on-demand service, suggesting a general lack of awareness rather than accessibility as the primary barrier to usage.

Specialized Transit within On-demand

Base: Current DRT Customer n=180



Only 10% of those with accessibility concerns have used the specialized transit service in the past 6 month. Most (over two-thirds) report not having used the service, and around 1 in 5 are unsure, suggesting a critical awareness gap.

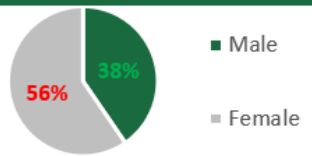
Ridership Profiles

Recent DRT Riders (n=130)

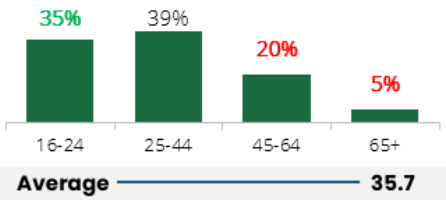
The majority of the recent riders are younger (avg. age 35), and either employed or students, reflecting DRT's strength in serving routine commutes like school and work. Recent riders are highly familiar (85%) and overwhelmingly likely to consider using DRT again (96%), with satisfaction driven by safety and comfort—yet top improvement areas center on speed, route availability, and service frequency, indicating rising expectations for efficiency and coverage.

DEMOGRAPHICS

Gender



Age

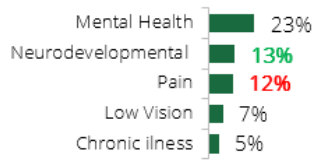


Employment Status

Employed	69%
Student	31%
Not employed/Retired	15%

Accessibility Concerns

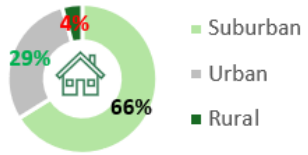
39% with accessibility concerns



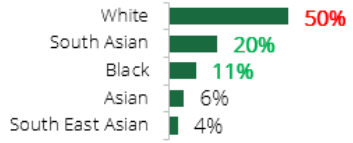
Place of Residence/Work

City	Home	Work/study
Oshawa	30%	34%
Ajax	29%	8%
Clarington	17%	6%
Whitby	14%	10%
Scugog	3%	0%
Pickering	2%	7%
Brock	1%	0%
Uxbridge	0%	2%

Area of Residence



Ethnicity



% with kids under 18

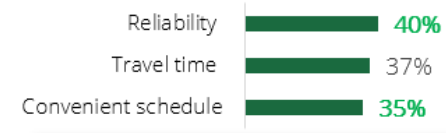
39%

TRAVEL BEHAVIOUR & MOST RECENT TRIP

Top 3 Trip Purposes by Mode (Past week)

Walk	Personal vehicle (as driver)	Personal vehicle (as passenger)	Rideshare (e.g., Uber, Lyft)	Public Transit
Drop off a Child 26%	Drop off a Child 34%	Enteratinment 15%	Social Visits 12%	Attend School 84%
Gym 16%	Shopping 14%	Running Errands 13%	Doctor's Appointment 10%	Work 82%
Entertainment 15%	Running Errands 13%	To Volunteer 11%	Personal Appointment 8%	To Volunteer 76%

Top 3 Factors for Mode Choice



23% traveled with others on most recent trip

2.4 avg # of tips in past week

Top 3 Recent Trip Purposes For The Most Recent Trip

52% Work | 27% School | 8% Shop

Top 3 Mode Used for Most Recent Trip

Public Transit	89%
Walk	27%
Personal vehicle (as a passenger)	10%

DRT Familiarity

Extremely/ Very Familiar 85%

DRT Consideration

Definitely / Probably Will 96%

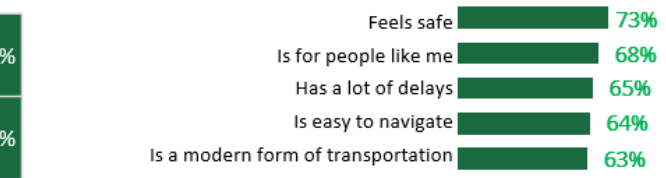
DRT Satisfaction

Extremely/ Somewhat Satisfied 67%

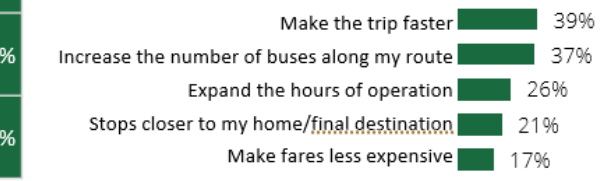
Top Elements of DRT Satisfaction

Boarding the bus	85%
The safety of the ride	84%
Getting off of the bus	84%
The comfort of the ride	80%
Payment options	80%

Top 5 Associations with DRT- % Agree



Top 5 DRT Opportunities for Improvement*



*Small base size. Interpret with caution

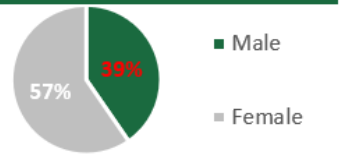
*stat testing is between recent DRT riders and Total

Infrequent DRT Riders (n=51)

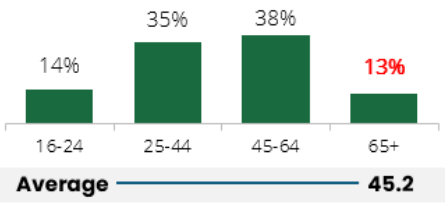
This group skews older (avg. age 45) and is primarily employed suburban residents with kids, highlighting a need for expanded reach, faster service, and education about DRT's convenience to increase habitual use. Despite lower familiarity (46%) compared to recent riders, infrequent users show strong satisfaction (82%) and high likelihood to reuse DRT (72%), suggesting a valuable opportunity to convert them into regular users through targeted improvements in coverage, service frequency, and communication.

DEMOGRAPHICS

Gender



Age

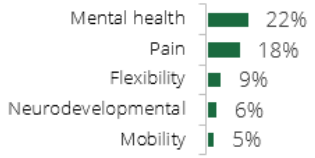


Employment Status

Employed	62%
Student	17%
Not employed/Retired	28%

Accessibility Concerns

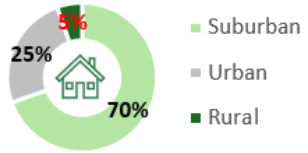
42% with accessibility concerns



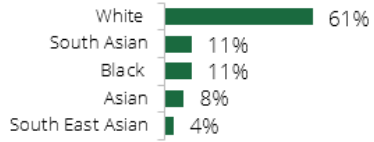
Place of Residence/Work

City	Home	Work/study
Clarington	28%	13%
Ajax	26%	11%
Oshawa	26%	26%
Whitby	16%	12%
Other	3%	32%
Pickering	1%	2%
Brock	1%	0%
Scugog	0%	3%

Area of Residence



Ethnicity



% with kids under 18

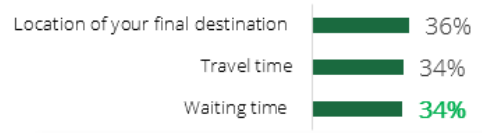
53%

TRAVEL BEHAVIOUR & MOST RECENT TRIP

Top 3 Trip Purposes by Mode (Past week) *

Walk	Personal vehicle (as driver)	Personal vehicle (as passenger)	Rideshare (e.g., Uber, Lyft)	Public Transit
Gym 33%	Drop off a child 78%	Enteratinment 38%	Work 3%	Attend School 55%
Drop off a child 11%	Personal Appointment 77%	Social Visits 24%	Social Visits 3%	Doctor's Appointment 27%
Work 10%	Running Errands 76%	Shopping 22%	Entertainment 3%	Work 20%

Top 3 Factors for Mode Choice



43% traveled with others on most recent trip

3.2 avg # of tips in past week

Top 3 Recent Trip Purposes

32% Work

15% Shop

14% Errands

Top 3 Mode Used for Most Recent Trip

Personal vehicle (as the driver)	56%
Public Transit	31%
Personal vehicle (as a passenger)	14%

DRT Familiarity

Extremely/ Very Familiar 46%

DRT Consideration

Definitely / Probably Will 72%

DRT Satisfaction*

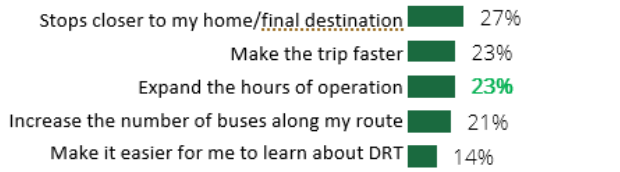
Extremely/ Somewhat Satisfied 82%

Top Elements of DRT Satisfaction*

The safety of the ride	94%
Boarding the bus	94%
Payment options	91%
The comfort of the ride	90%
The comfort of the seats	90%

Top 5 Associations with DRT- % Agree

Top 5 DRT Opportunities for Improvement



*Small base size. Interpret with caution

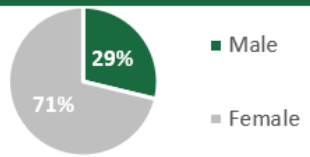
*stat testing is between infrequent DRT riders and Total

Non-Riders (n=608)

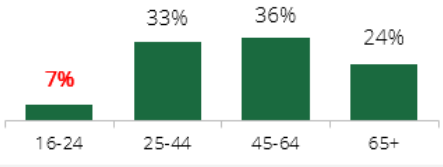
Non-riders skew older (average age 50), predominantly female, and are more likely to be employed, with a high share living in suburban areas. Low familiarity (19%) and even lower consideration (41%) for DRT suggest a major awareness and perception gap, with the top barrier being a preference for driving—underscoring the need for targeted education and marketing to address misconceptions around convenience, speed, and reach of DRT services.

DEMOGRAPHICS

Gender



Age



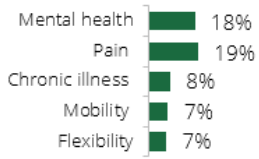
Average 50.3

Employment Status

Employed	61%
Student	8%
Not employed/Retired	34%

Accessibility Concerns

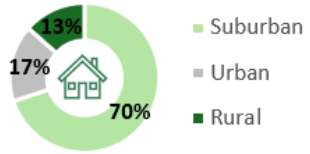
41% with accessibility concerns



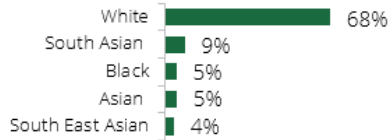
Place of Residence/Work

City	Home	Work/study
Oshawa	23%	15%
Whitby	21%	14%
Pickering	17%	7%
Ajax	15%	9%
Clarington	13%	4%
Uxbridge	4%	2%
Scugog	3%	1%
Brock	2%	1%

Area of Residence



Ethnicity



% with kids under 18

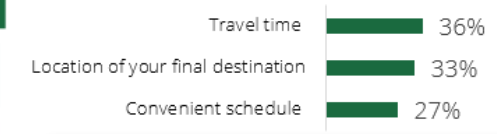
33%

TRAVEL BEHAVIOUR & MOST RECENT TRIP

Top 3 Trip Purposes by Mode (Past week)

Walk	Personal vehicle (as driver)	Personal vehicle (as passenger)	Rideshare (e.g., Uber, Lyft)	Public Transit
Attend school 18%	Drop off a Child 83%	Doctor's Appointment 21%	To Volunteer 5%	Attend School 45%
To volunteer 11%	Personal Appointment 78%	Entertainment 21%	Social Visits 4%	Work 9%
Drop off a Child 10%	Gym 74%	Running Errands 19%	Entertainment 4%	Entertainment 7%

Top 3 Factors for Mode Choice



48% traveled with others on most recent trip

3.7 avg # of tips in past week

Top 3 Recent Trip Purposes The Most Recent Trip

30% Errands | 25% Shop | 24% Work

Top 3 Mode Used for Most Recent Trip

Personal vehicle (as driver)	69%
Personal vehicle (as a passenger)	20%
Walk	9%

DRT Familiarity

Extremely/ Very Familiar 19%

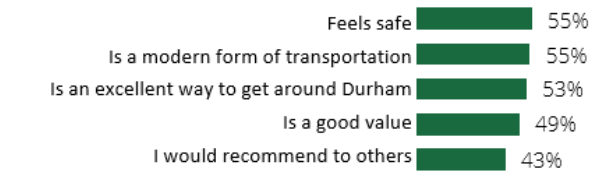
DRT Consideration

Definitely / Probably Will 41%

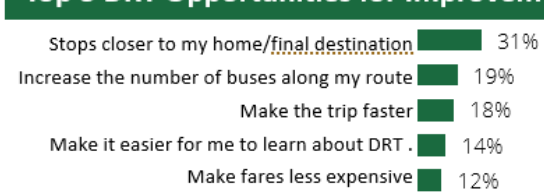
Reasons for not choosing DRT

Prefer driving	44%
Takes too long / other modes of transportation are faster	25%
Prefer door-to-door transportation modes	22%
Did not want to spend the time waiting for the bus	20%
Bus does not travel to the destination(s) I need	18%

Top 5 Associations with DRT- % Agree



Top 5 DRT Opportunities for Improvement



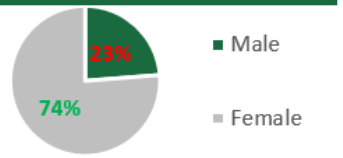
*stat testing is between non-riders and Total

Those with Accessibility Concerns (n=320)

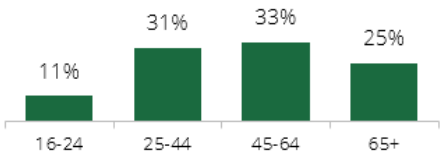
Those with accessibility concerns tend to be older (average age 49), predominantly female (74%), and are more likely to be retired, with many residing in suburban areas. Despite high satisfaction with DRT's core experience (72%), low familiarity (29%) and continued reliance on personal vehicles signal a need for better outreach and accessibility-focused improvements—particularly around door-to-door service and destination coverage.
Only 1 in 10 have used the on-demand services with DRT, suggesting a general lack of awareness rather than accessibility as the primary barrier to usage.

DEMOGRAPHICS

Gender



Age

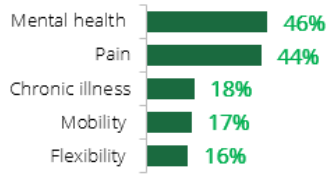


Average 49.4

Employment Status

Employed	53%
Student	12%
Not employed/Retired	42%

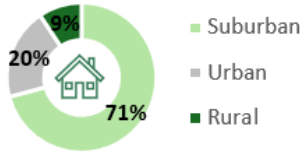
Accessibility Concerns



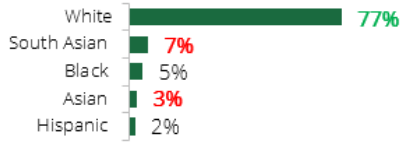
Place of Residence/Work

City	Home	Work/study
Oshawa	23%	18%
Whitby	20%	14%
Ajax	17%	10%
Clarington	17%	6%
Pickering	12%	8%
Scugog	3%	1%
Uxbridge	2%	2%
Brock	2%	1%

Area of Residence



Ethnicity



% with kids under 18

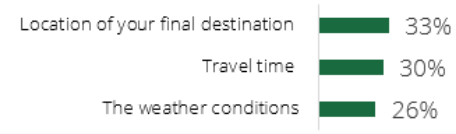
33%

TRAVEL BEHAVIOUR & MOST RECENT TRIP

Top 3 Trip Purpose by Mode (Past week)

Walk	Personal vehicle (as driver)	Personal vehicle (as passenger)	Rideshare (e.g., Uber, Lyft)	Public Transit
To volunteer 12%	Drop off a Child 83%	Enteratinment 25%	Social Visits 4%	Attend School 54%
Drop off a Child 8%	Gym/ Recreation 70%	Doctor's Appointment 24%	Running Errands 4%	Work 21%
Attend School 7%	Personal Appointment 68%	Running Errands 20%	Gym 4%	Entertainment 14%

Top 3 Factors for Mode Choice



51% traveled with others on most recent trip

3.5 avg # of tips in past week

Top 3 Recent Trip Purposes The Most Recent Trip

34% Errands | 25% Shop | 20% Work

Top 3 Mode Used for Most Recent Trip

Personal vehicle (as driver)	54%
Personal vehicle (as a passenger)	22%
Public Transit	21%

DRT Familiarity

Extremely/ Very Familiar 29%

DRT Consideration

Definitely / Probably Will 49%

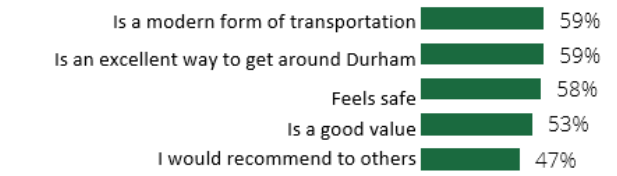
DRT Satisfaction

Extremely/ Somewhat Satisfied 72%

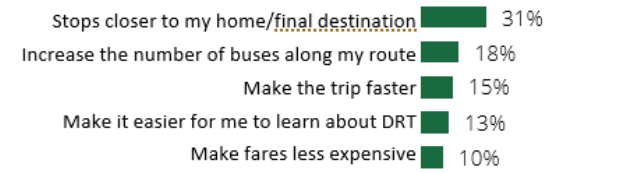
Top Elements of DRT Satisfaction

The safety of the ride	85%
Boarding the bus	81%
Getting off of the bus	80%
The professionalism of the driver	78%
Temperature on the bus	77%

Top 5 Associations with DRT- % Agree



Top 5 DRT Opportunities for Improvement



*stat testing is between people with accessibility concerns and those without