UITPANZ WEBINAR SERIES

Customer Experience & Commuter Confidence – Rebuilding Trust in our Networks

WEBINAR STARTING SOON
Introductory Remarks

Michelle Batsas
Executive Director
UITP Australia New Zealand
Agenda

- Introduction and guidelines
- The Department of Transport, Victoria Approach
- The European Experience
- Panel Discussion with Q&A
Customer Experience and Commuter Confidence – Rebuilding Trust in our Networks

Michelle Batsas
Executive Director
UITP ANZ

Susan Kelso
Chief Customer Experience Officer
Department of Transport, Victoria

Elisabeth Oger
Group Customer Director
Transdev Group
GUIDELINES

• Submit questions via the Q&A function on the control panel
• Questions will be responded to during the Panel discussion
• Webinar is being recorded and will be sent to attendees
• Short survey at the end of the webinar
The Victorian Approach

Susan Kelso
Chief Customer Experience Officer
Department of Transport, Victoria
Building trust and confidence in our public transport network

Victorian’s current experiences on public transport
Customer behaviour around public transport during April

90% ↓
Public transport patronage drop *
* myki users, April 2020

90% drop in public transport patronage at its peak YoY
86% decrease in website and app traffic YoY
97% drop in foot traffic through public transport hubs YoY
50% decrease in call volumes YoY

37%
cautious around using PT *

50%
Somewhat cautious around using PT *

12%
Not at all cautious around using PT *

Having low passenger volumes is a key component to people feeling safe

50%
using road transport to get to work or study (37% pre coronavirus) *

21%
of people that need to go to a pharmacy or medical appointment rely on public transport *

MAINTAINING OUR DISTANCE

64% of customers are satisfied with other's behaviour onboard PT *

51% of customers are satisfied with the ability to practice physical distancing onboard PT *

* SOURCE: EY Sweeney, of those surveyed
5 KEY THEMES FROM OUR CUSTOMERS

**Physical Distancing**
Others behaviours | Guidance

I’m scared to take the tram – I don’t want people breathing on me

**Cleanliness**
How often | Visibility | Comfort | ‘Safe’ now includes clean

I don’t normally think about handrails, but I’ve started doing that now

**Hygiene**
Sanitising stations | Coughing | Cashless | Masks

49% of social media comments relate to advocating or demanding the use of masks on PT (week ending 5 July 2020)

**Flexibility**
Ticketing options | Future travel behaviour | myki refunds

In future I will only need to travel on public transport 2-3 days a week

**Information**
Consistency | Real time | coronavirus overload

There’s too much generic information. Tell me what I’m meant to do on PT
We perceive that the way people travel will continue to shift over time

**SHIFTING MODES**
We expect to see a maintained modal shift, as a result of people’s level of perceived risk across various modes of transport.

**SHIFTING DEMANDS**
Demand across various ticketing products and services will shift as fundamental travel patterns change.

*My myki pass won’t work for me anymore as I will only need to travel on public transport 2-3 days per week*

- **2.5k** myki pass refunds
- **33k** myki balance refunds
- **26k** Requests to pause

**SHIFTING INTERACTIONS**
- Times people travel will change
- Extra cleaning is a high priority
- Contactless Top Up methods promoted
- Cashless methods strongly encouraged
People’s expectations will also change

- Real time, accurate information about the best time to travel across all modes, especially during peak and busy times
- Transparency around what is being done to protect passengers – what cleaning is taking place, understand the practices that are being deployed and how often
- Being able to avoid touching surfaces on public transport that are perceived to be unclean, such as rails, doors, buttons, seats and seat handles
- Expectation that there will be an adherence to government guidelines, particularly around physical distancing and cleaning regimes
- An official position on face masks – wearing when in public and specifically on PT

SHIFTING EXPECTATIONS
How we are rebuilding trust and confidence

CLEANLINESS AND HYGIENE

- **Messaging around hygiene and cleaning practices**
  - Passengers encouraged to wear masks

- **Sanitizing stations**
  - Installing 350+ touchless hand sanitizing stations across busiest stations, stops, terminals and within all public transport hubs.

- **Announcements in social media and onboard with 'hold on' message**
  - We are sanitising high touch surfaces frequently throughout the day, so please hold on for your safety.

- **Removing cash handling**
  - Implemented cashless ways to top up or purchase a ticket. Removal of all cash from key parts of the network.

- **Hand sanitiser/wipes for operator, DoT staff and customers**

- **Onboard high touch cleaning for train, trams and buses**

- **Enhancing daily cleaning**

- **Overnight deep cleaning**

- **4 key cleanliness messages**
How we are rebuilding trust and confidence

**PHYSICAL DISTANCING**

<table>
<thead>
<tr>
<th>Pre Coronavirus</th>
<th>1st Coronavirus Peak</th>
<th>Return to Network</th>
</tr>
</thead>
<tbody>
<tr>
<td>Front door boarding Only</td>
<td>Rear door boarding Limited use of front door for boarding trams and buses to protect drivers</td>
<td>All door boarding Board from any door to start to spread load and encourage physical distancing</td>
</tr>
</tbody>
</table>

- 95% Additional train services a week outside the traditional peak to help people stay safe and spread out.
- 2% New tram shuttle routes to provide additional capacity through the CBD.

Implemented functional information to help customers understand the role they should be playing to keep everyone safe.

Maintained full timetable throughout pandemic and increased the number of services to flatten the peak (from 13 July).

Driver Exclusion Zone
- Restricted access to the first row of seats on trams and buses.

Driver Exclusion Zone
- Bollards for physical distance between staff & customers
- Decals on Floor
- Removed Concierge
- Signs on counters

Physical distancing measures in place at customer service centres.

Decals/posters at stations and stops.

Change to Bus boarding overtime to facilitate social distancing.
How we are rebuilding trust and confidence

PROVIDING FLEXIBILITY FOR CHANGING CUSTOMER BEHAVIOURS

Removal of cash and helping customers understand alternative top-up options

Encouraging new travel behaviours

Providing myki top-up facilities at VicRoads Hubs

Incentivising customers to travel outside the peak

Enabling customers to pause their myki pass (through call centre and online)

Free Early Bird travel

Train passengers can benefit from free early bird travel, with all metropolitan fringe free if you touch on and off before 7.15am.
Customers were beginning to return to the network

30% Public transport patronage increase *
* myki users, 90% drop in April, reduced to 69% drop in June 2020

43% increase in website traffic from lowest point (86% vs. 60% drop)
87% increase in app traffic from lowest point (86% vs. 46% drop)
19% increase in foot traffic through public transport hubs (97% vs. 81% drop)
35% increase in call volumes (50% vs. 37% drop)

TRAVEL REASONS
We started to see some customers returning to the network use public transport more often than they used to, with growth across four key activities

PICKING UP STEAM
Whilst patronage is still down overall, occasional travelers are increasing their use of PT * (Q4 2019 to Q4 2020)

Percentage point (pp) change from April to June

- Increase in using public transport to travel to social outings *
  - 3pp up

- Increase in using public transport to get to work *
  - 4pp up

- Increase in using public transport to run errands, do drop‐offs and get to appointments *
  - 4pp up

- Increase in using public transport to go to study *
  - 5pp up

* SOURCE: COVID Sentiment Tracker

- It is good to see more staff at tram stops relaying information. Also extra efforts to keep trams clean  Male, age 55+

- Coronavirus hasn’t shut down the PT network yet. that's good because it means I can still go to work  Male, age 25-34

- Thank you for the updates. As someone who doesn’t own a car and needs public transport to get groceries, this is vital information. Keep up the good work!!!
Thank-you

Susan Kelso - susan.kelso@transport.vic.gov.au
The European Experience

Elisabeth Oger
Group Customer Director
Transdev Group
Transdev around the world

85,000
EMPLOYEES

17
COUNTRIES

17
MODES
Transdev in Australia and New Zealand

5,100
EMPLOYEES

+1900
VEHICLES | VESSELS

125 M
CUSTOMERS PER YEAR

12
NETWORKS IN BUS, FERRY, LIGHT RAIL, RAIL AND ODT
Our group is leveraging on the Transdev way to go #backontrack
Our priorities to support our customers and clients in this new world
Ridership has been continuously monitored at global level

Transdev Mobility Index from networks in 8 countries (FR, NL, Aus, NZ, Ge, PT, Sp, HK)
Reinventing traditional customer journeys has been our focus

Ensuring stations & vehicles are **cleanest as ever**

Offering **contactless journeys** to passengers

Covering **basic services** including **passenger information**

Managing flows & delivering **extra passenger information**
... As well as staying tuned to our passengers’ perceptions & emotions to adapt our offer as fast as possible.

+6000 verbatims analyzed worldwide since the beginning of the health crisis

Originating from 58 networks within 11 countries worldwide, including Australia & New Zealand

Objective

-> Identifying passenger painpoints, low signals to take into account, but also passengers’ delighters

- Emotions expressed:
  - Passengers are mostly inquiring (65%), followed by neutral (24%) and angry (4%).
Collecting insights on passengers’ behaviors & expectations worldwide through a “train of thought” modelization

Moving decision
« Do I decide to move or to stay home ? »

45% of Canadians are in favor of remote working
Source : Etude What canadians think about covid 19 and the future, May 2020

37% of the Swedish wish to pursue remote working post crisis
Source : Swedish YouGov Study, May 2020

Transport mode selection
« Do I want to take PT or use other means of transport ? »

29% of the passengers who had always been taking metro before this virus crisis chose other transport recently
Source : Research Summary of Shenzhen Metro ridership During COVID-19 Crisis, April 2020

50% will want to continue walking if a vaccine is found when only 16% are ready to resume PT without a vaccine
Source : Survey “what canadians think about covid 19 and the future”, may 2020

Trip planning
« How do I plan my mobility consumption ? »

Regarding alternatives to PT, passengers consider either the car (70%), walking (49%), bikeriding (37%), motorized two wheelers (7%)
Source : article from France tv info, Post-lockdown: a 3rd of PT users are not sure to resume, May 2020

82% are OK changing their timetables, 73% are even OK to do a longer journey if it’s safer
Source : study of post lockdown, the impact of French mistrust towards PT after May 11th, May 2020

Travelling
« If I decide to take PT, how will my CX standards evolve ?»

34% of passengers consider enforcing barrier gestures the operator’s role vs 29% think it’s everyone’s job
Source : Study by BVA for the TD French Task force, May 2020

Reliable, accessible, and affordable transportation that minimizes environmental impacts is still a critical need
Source : BCG article, How COVID-19 Will Shape Urban Mobility, June 2020

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Case study #1 : France

How French operations are taking care of passengers to gain them back
+90 urban networks

+130 PTA

Main private rail operator in Europe

34,000 employees

4 million passengers/day

Communication channels towards passengers

Website
App
Emails
Social media
Agency
Passenger info onboard/at the station
Case study #1 : France
How French operations are taking care of passengers to gain them back 1/2

Setting up nudges to reassure & have barrier gestures respected

Mobility monitoring platform, enabling actions plans based on users’ needs & usages

Fostering digital journeys with new features (contactless payments & traffic load)

Ad hoc study to better understand passengers’ expectations

Study done over 1500 respondents*
-> main fear is catching covid (82%) while main expectation is to have enough space between passengers (68%)

*all customers before lockdown
Case study #1: France
How French operations are taking care of passengers to gain them back 2/2

Tramway wearing a mask in Montpellier

Social distancing stickers in Montpellier

Communication through Instagram

Quirky campaigns in Reims to reassure passengers in coming back into the bus or tramway

Information provided on network’s website, with the help of a virtual agent

UITP webinar | July 15th 2020
Case study #2: Netherlands

How Dutch operations are taking care of passengers to gain them back
+1783 buses

11 networks

1,151 million passengers-km public transport a year

Of which >410 zero emissions buses

1st zero emissions bus operator in Europe

6,900 employees

Communication channels towards passengers

- Website
- App
- Emails
- Social media
- Agency
- Passenger info onboard/at the station
Case study #2: Netherlands
How Dutch operations are taking care of passengers to gain them back 1/2

Launch of a mobile ticketing solution on web/app to make up for the closing of ticket sales onboard

Understanding passengers’ expectations

Study sent to passengers throughout +10 networks received an outstanding 7000 answers

65% of respondents indicate that their travel frequency after COVID will not change; 70% of respondents are relying on PT

+ High ratings from passengers regarding measures taken (safety & cleanliness, ease of travel with mobile ticketing & occupancy rate)
Case study #2: Netherlands
How Dutch operations are taking care of passengers to gain them back 2/2

- **Social media** – to inform & share positive news
- **Direct mail** to passengers, including link to survey

Social media communications to inform about barrier measures

Example of onboard display

‘Bart de buschauffeur’ (@bartopdebus) post, a driver active on Twitter with a large base of followers (mainly passengers)
Opening these case studies to a broader perspective on health crisis management from an operator viewpoint

Thinking global, acting local

Collaborating with our internal teams, PTA, Unions, stakeholders

Providing positive, reassuring messages through a wide range of channels
We also focus on redesigning & adapting our offer dynamically

- **During lockdown**: On-demand transportation for essential lines (mostly for caregivers to provide access to hospitals)

- **Post-lockdown**:
  - Gradual ridership increase -> adaptation of service levels
  - Leveraging on ToD expertise to be more dynamic
Transdev is more than ever aligned with its reason of being

“We empower freedom to move every day with confidence thanks to reliable and innovative solutions that serve the common good”
Thank you!
QUESTIONS?
Please submit questions via the Q&A function on the control panel.
WEBINARS

Simon Reed
Head of Technology & Data, Surface Transport, Transport for London

Wednesday 5 August | 3:00pm - 4:00pm (AEST)

Jeremy Yap
Deputy Chief Executive, LTA

Wednesday 19 August | 1:00pm - 2:00pm (AEST)

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