

The potential of Customer Satisfaction Analysis

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Autonomous Province of Bolzano - South
Tyrol (IT)

Location of South Tyrol





Surface: 7,400 km²
70% mountains and woods



Inhabitants: 505,067
Municipalities: 116



Only 6.6% of the surface are potential settlement
area

Density: 68 pers./km²



Tourism: 5.9m arrivals, 29m overnight stays,
>11% local GDP (direct + indirect effects)



Public transport: integrated system
(ticketing and timetabling)

The European Academy of Bozen/Bolzano (EURAC)

- Is an institute for applied research and further education
- Was founded in 1992 as a private non-profit organization
- Has about 320 collaborators



Characteristics:

- Applied research in the fields of Technologies, Mountains, Health and Autonomies
- Flexible interdisciplinarity and cooperation between researchers of different scientific and geographic background
- International scientific network

The Mobility Agency is the regional passenger rail authority of the Autonomous Province of Bolzano - South Tyrol

- Institution instrumental to the Autonomous Province of Bolzano
- Founded in 2012 as a public organisation, about 7 collaborators

Activities:

- Planning of local transport service
- Information to users
- Communication and marketing
- Coordination of ICTs
- Public transport service controlling
- Mobility management

Mobility Agency of the Autonomous Province of Bolzano - South Tyrol

Objectives:

- to guarantee to public transport users the best possible transport quality, given the available infrastructures and economic resources
- “interactive information” of citizens
- Service quality control
- Mobility management
- Innovative projects

Ticketing system



Südtirol Pass in Zahlen

120.034
beantragte Südtirol Pässe (bis 14. Februar 2013), davon

- 36 % mit ermäßigtem Familientarif
- 64 % mit Normaltarif
- 31 % Südtirol Pässe mit Bezahlung per Bankeinzug
- 69 % Südtirol Pässe prepaid (aufladbare Karten)

zudem:

- 3.691** Südtirol Pässe „free“ für Menschen mit Invalidität ab 74 %
- 74.671** Südtirol Pass 65+ , davon
 - 67.721** kostenlose (für Personen ab 70 Jahren)
 - 6.950** bezahlte Abos (für Personen zwischen 61 und 70 Jahren)
- 80.306** Südtirol Pass Abo+, davon
 - 71.990** kostenlose (für Schüler/innen)
 - 8.316** bezahlte Abos für Studenten und Lehrlinge

EURAC Pilot Project: Customer Satisfaction Analysis on regional rail transport in South Tyrol



The goals of the EURAC Customer Satisfaction Analysis pilot project



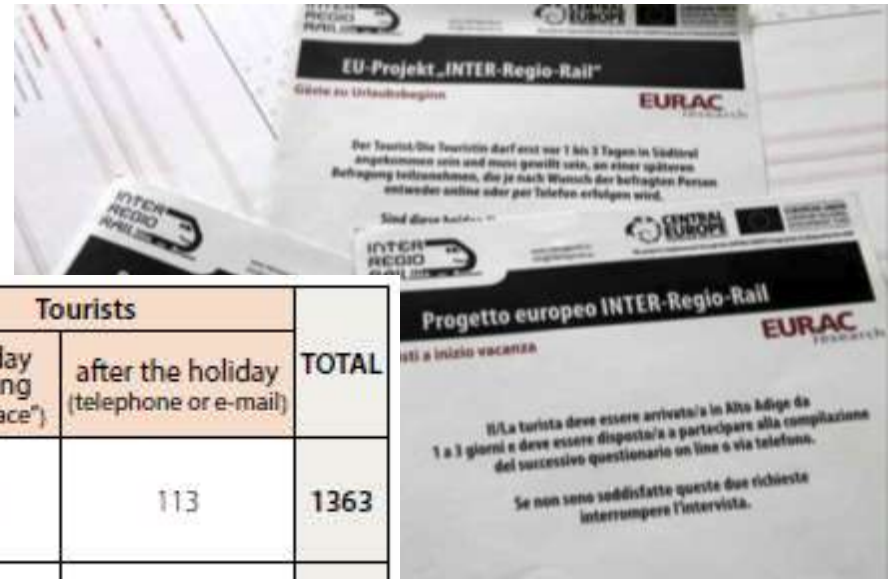
- to investigate **passengers' satisfaction** with South Tyrolean regional rail transport
- to understand **the reasons why** potential rail customers do not take the train
- to define **ideas for measures and activities** in order to increase the share in regional rail transport, to improve service quality and to diminish barriers

Methods

1. Data collection through **sample surveys**
2. Data **elaboration/presentation**
3. Implementation **strategy**



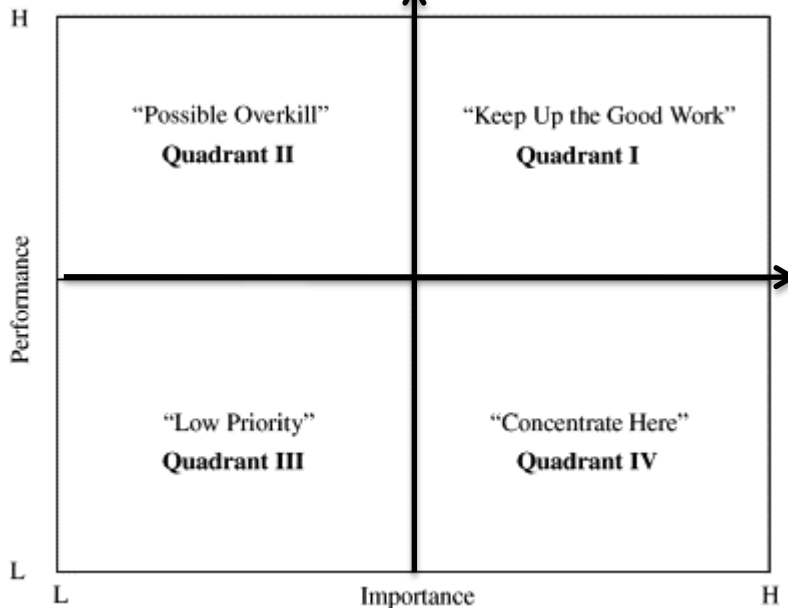
Methods / 1. Data collection through sample surveys



	Residents		Tourists		TOTAL
	... who travel by train (filled out individually)	... who do not travel by train ("face-to-face")	at holiday beginning ("face-to-face")	after the holiday (telephone or e-mail)	
Summer wave (August-October 2011)	492	270	488	113	1363
Winter wave (December 2011-April 2012)	1028	538	1059	210	2835
TOTAL	1520	808	1547	323	4198

Methods / 2. Data elaboration/presentation

IPA-Importance Performance Analysis



1) **MEASUREMENT** of

→ IMPORTANCE

→ PERFORMANCE

8 MACRO-FACTORS AND RELATED MICRO-FACTORS



2) **POSITIONING** in the IPA matrix

> **IPA Methodology helps defining priorities according to passengers' needs and priorities**

Methods / 3. Implementation strategy

...defined through:

- Importance-Performance-Analysis
- to understand **the reasons why** potential rail customers do not take the train
- to define **ideas for measures and activities** in order to increase the share in regional rail transport, to improve service quality and to diminish barriers



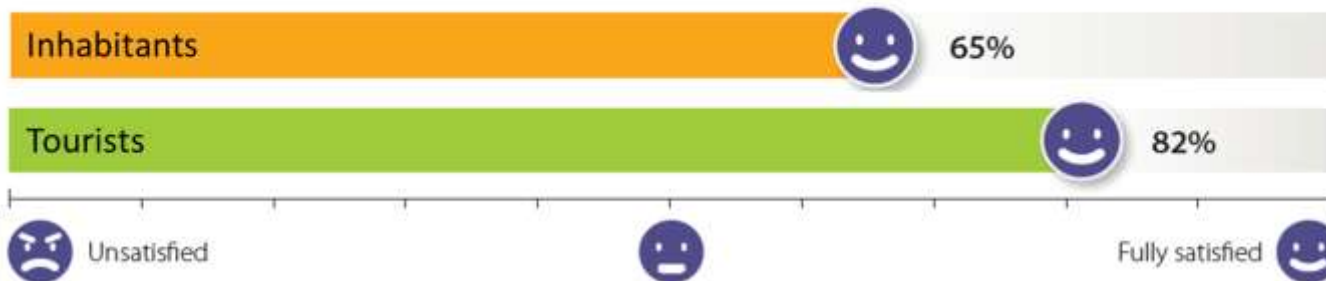
Findings

1. **Satisfaction** degree with regional rail transport
2. **Strategic factors** in regional rail transport
3. **Barriers to be overcome** in order to address potential customers

Findings:

1. Satisfaction degree with regional rail transport

Generally speaking, how satisfied are you with the regional rail transportation in South Tyrol?



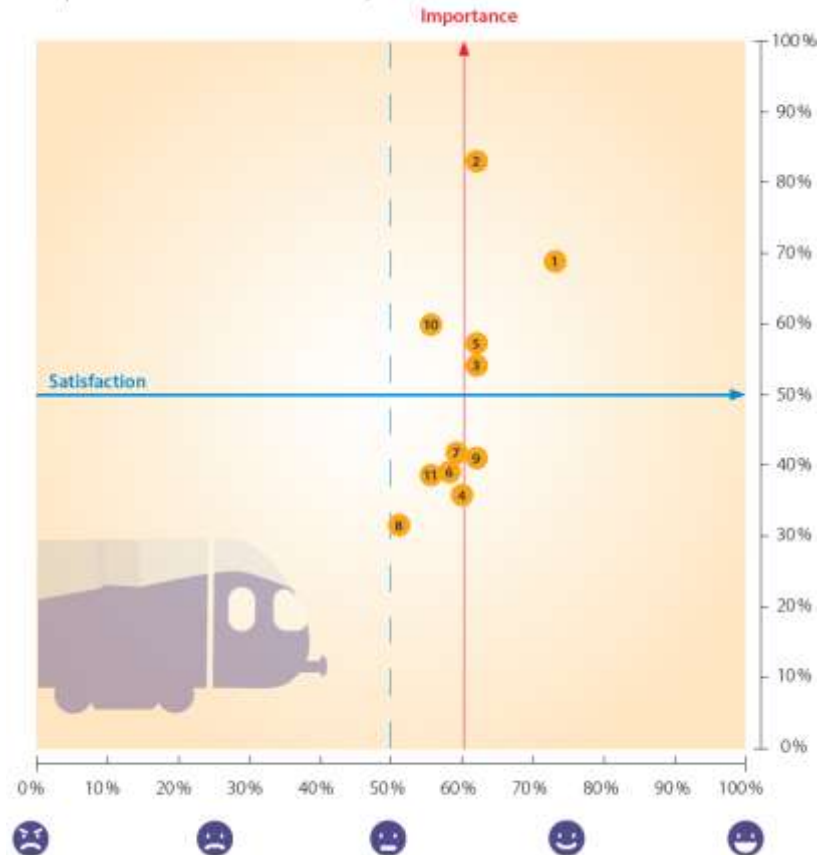
- Satisfaction degree according to target type?
- Satisfaction degree according to frequency of usage?

Findings: 2. Strategic factors in regional rail transport (Inhabitants)

- Accessibility is the most satisfying factor
- Reliability is the most important
- Information is not strategic

	Satisfaction	Importance
1 Accessibility	73%	69%
2 Reliability	62%	83%
3 Travel Comfort	62%	54%
4 Infrastructures on stations	60%	36%
5 Quality of transportation network	62%	55%
6 Information found before the journey	58%	39%
7 Information given at station	59%	42%
8 Information given on board	51%	32%
9 Tickets	62%	40%
10 Fares	56%	60%
11 Service	56%	39%

Importance-Performance Analysis

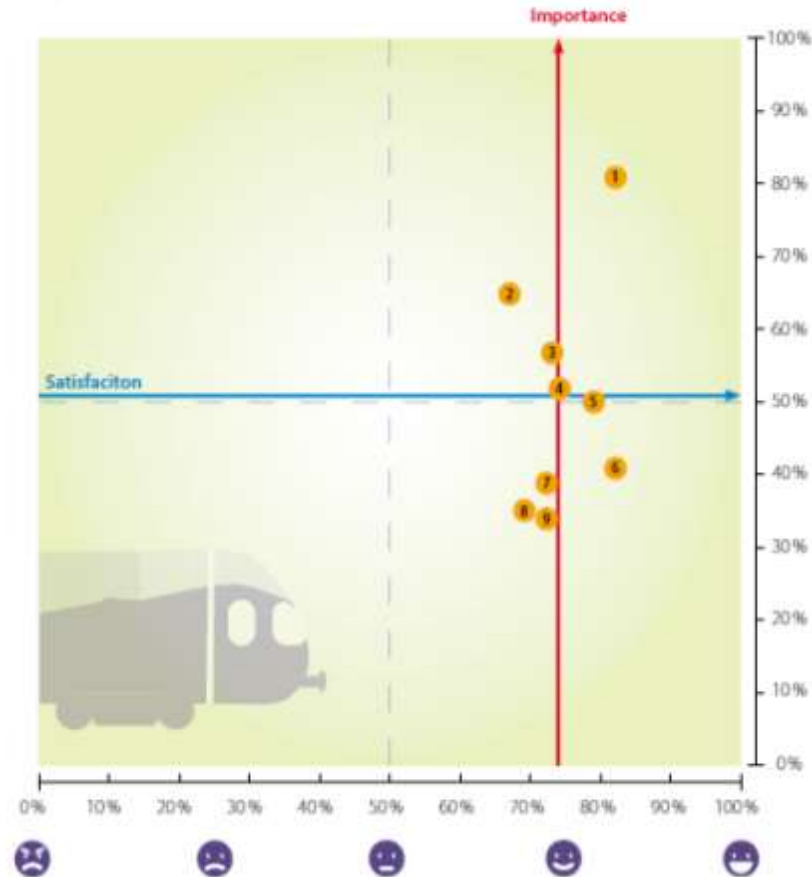


Findings: 2. Strategic factors in regional rail transport (Tourists)

- Reliability and accessibility are the most satisfactory factors
- Accessibility and tickets are the most important factors
- Information is more important than for inhabitants

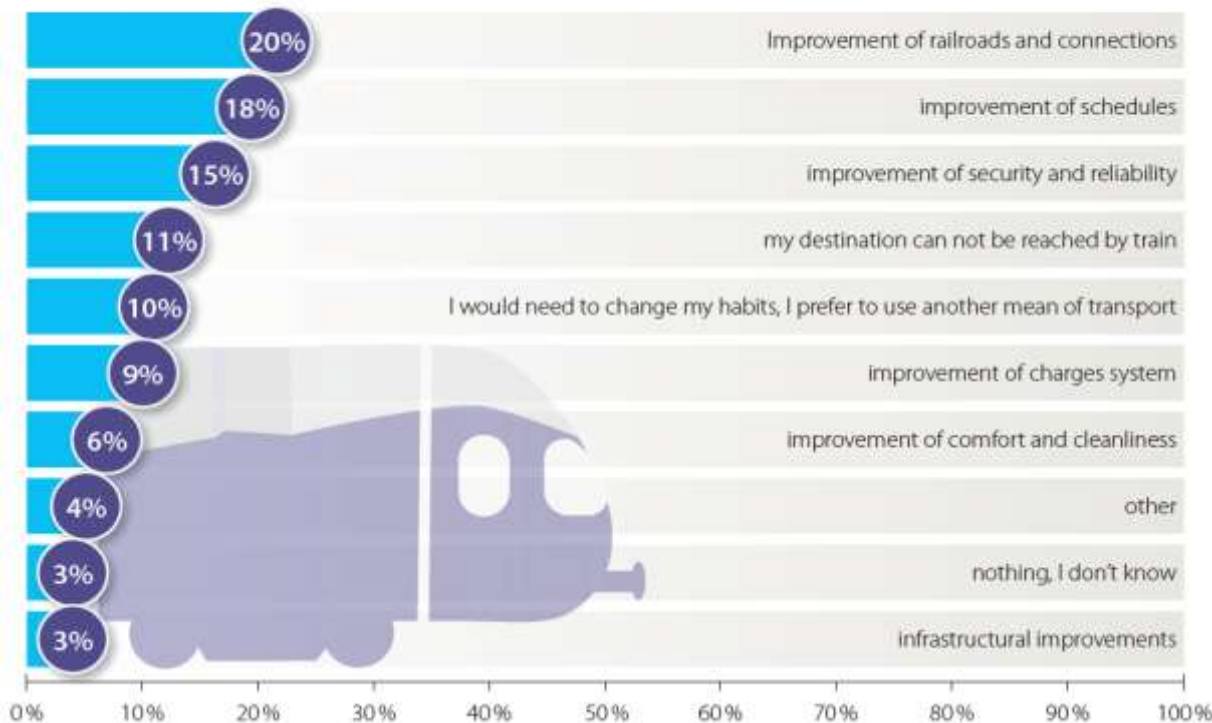
	Satisfaction	Importance
1 Accessibility	82%	81%
2 Tickets	67%	65%
3 Service	73%	57%
4 Information	74%	52%
5 Travel Comfort	79%	50%
6 Reliability	82%	41%
7 Quality of transportation network	72%	39%
8 Infrastructures	69%	35%
9 Fares	72%	34%

Importance-Performance Analysis



Findings: 3. Barriers to be overcome (Inhabitants)

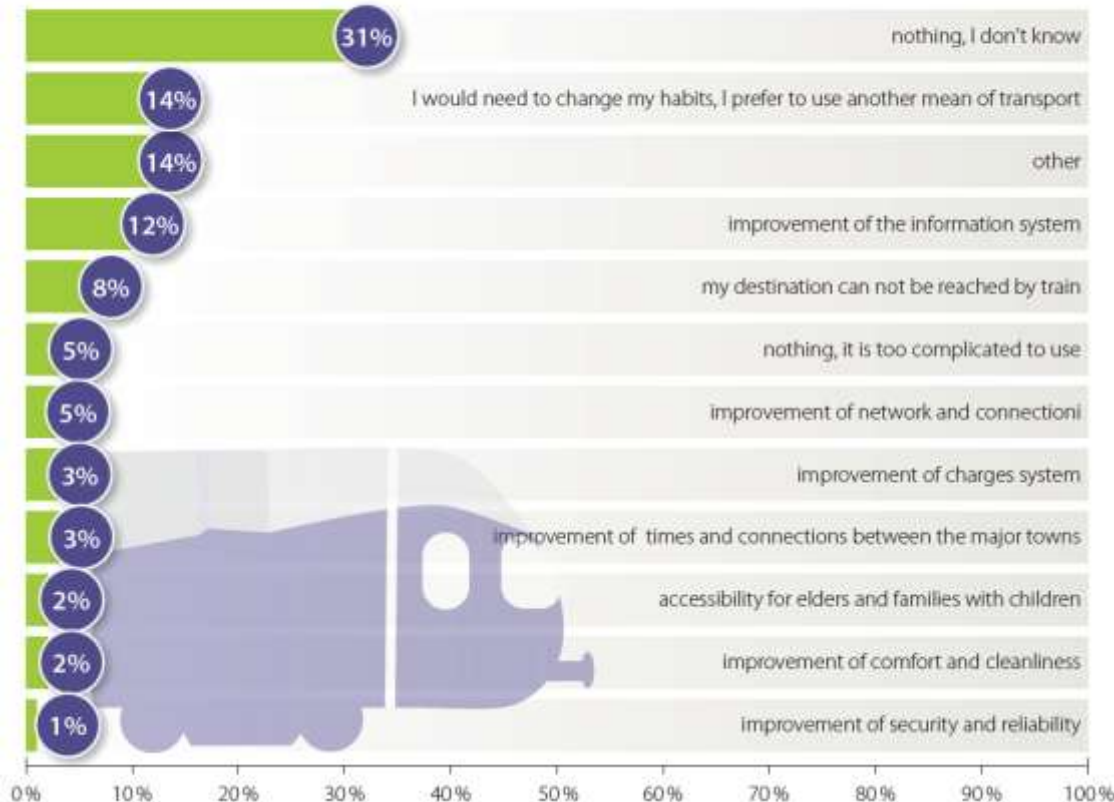
What should change in order to convince you to use the train regularly?
(open question)



**> Physical and psychological barriers:
better infrastructure, better performance in services, reachability, mind change, nothing has to change (mind change?)**

Findings: 3. Barriers to be overcome (Tourists)

What would have to change in order for you to use the train during your next stay in South Tyrol? (open question)



> Psychological more than physical barriers:
nothing has to change (mind change?),
better information system,
reachability,
network and connections



Findings: Summary

	Residents	Tourists
Users	<p>Focus efforts on:</p> <ul style="list-style-type: none"> - Fares (price/performance ratio, communication about prices and their variations, fairness of the pricing system) <p>Maintain performance on:</p> <ul style="list-style-type: none"> - Reachability of train stations - Reliability - Network quality (schedules, connections, travel duration) - Travel comfort 	<p>Focus efforts on:</p> <ul style="list-style-type: none"> - Tickets (purchasing ad usability) - Service (competence/friendliness of the staff) - Information (prior to departure) <p>Maintain performance on:</p> <ul style="list-style-type: none"> - Reachability of train stations - Network quality (schedules, connections, travel duration)
Non users	<p>Changes to make rail transport become attractive</p> <ul style="list-style-type: none"> - Network quality and reachability, schedules and connections - Reliability - Mind-change - Tariffs - Comfort and cleanliness 	<p>Changes to make rail transport become attractive</p> <ul style="list-style-type: none"> - Mind-change - Information and its diffusion - Destination reachability - Network quality and connections

Implementation strategy



Pictures: <http://behostels.com/barcelona-most-useful-apps-for-iphone/>
<http://www.mobilityweek.eu/news/view/article/2012/11/29/european-commission-announces-winners-of-sustainable-mobility-funding/>

Implementation strategy: Satisfaction monitoring and focussed investments



- Passengers' satisfaction should be periodically measured and should comprehend the whole integrated transport system
 - > lower sample and simplified/on-line versions
 - > Focusing on all factors or on specific (strategic) ones
 - > EURAC is currently working on a CSA on local bus transport, commissioned by the provincial Mobility Agency

Implementation strategy: Satisfaction monitoring and focussed investments



CSA on local bus transport

- **Target:** residents and tourists (2.200 questionnaires)
- **Aim:** To get a global picture on CSA on public transport, To compare rail vs. bus transport

Costs: \approx 40,000 €

Action plan: Sustainable mobility promotion



Psychological barriers to regional rail transport could be overcome through a mind-change, to be fostered through

- Local **advertising campaigns** to promote sustainable public transport and its benefits
- **Workshops/Trainings** in primary and secondary schools, in order to enhance the perceived value and the avoided external costs of the sustainable transport choice
- **Events**, such as public conferences, exhibitions, initiatives addressed to both residents and tourists during the European Mobility week;
- **Permanent vitalization of rail stations** through periodic events or the creation of cultural services (e.g. station libraries)

Action plan: Sustainable mobility promotion



Conference on passengers' satisfaction with public transport

- **Target:** local authorities/operators, experts, passengers
- **Aim:** to disseminate CSA results and to promote a consumer-based approach among the operators

Costs: \approx 10.000 € (1/2 day event with 4-5 speakers)

Action plan: Sustainable mobility promotion



Training for special passenger groups

- **Target:** elderly people, students, hoteliers, foreigners
- **Aim:** to remove psychological/cultural barriers to public transport

Costs: ≈ 0 € (only staff costs of public employees)



Action plan: Information through ICTs

Different tools to improve information on integrated public transport:

- Development of an a **Public transport information system** and an **Application** for smartphones and Iphones (connections, schedules, tickets)
- **Google Transit**, to map public transport precisely, with detailed indication and visualization of stops, interconnections and schedules

In particular, concerning tourists

- integration of the information on public transport in all the **existing Applications** to promote Tourism in South Tyrol;
- creation of an information point on public transport in local tourism offices



Action plan: Information through ICTs

Public transport information system

- **Target:** passengers and potential users, particularly tourists
- **Aim:** to create an integrated data platform with digital geographic information available for all passengers via internet [and later via smartphones (App)]
 - e.g.: schedules, fares, restaurants, accommodation facilities, tourism attractions, events, bike rental points, etc...
 - App available off-line (for tourists)

Costs: \approx 200.000 € for the information system, \approx 30.000 € for an App



Action plan: Information through ICTs

Infopoints

- **Target:** passengers and potential users, particularly tourists
- **Aim:** to give customized information on the site, to help special categories of passengers, to sell national and international tickets

Costs:

- ≈ 200.000 € /year for ad-hoc infopoints with ≈ 6 employees (costs subject to great variations depending on rent money and number of employees required)
- ≈ 0 € if infopoints are integrated in tourism offices/hotels (only regular training costs of employees)

Transferrability to other passenger rail authorities

The pilot project may be transferable to other regions, given the following conditions:

- Approach to transport with a strong orientation to customer
- Know-how in Customer Satisfaction Analysis
- Power and capacity to transform the results of the CSA into concrete actions

Costs and benefits:

- +
 - It helps to calibrate institutions' priorities with customers' priorities
 - It could help in the evaluation of the externalised services in public transport (e.g. cleaning or catering enterprises)
 - Regular CSAs may give feedbacks to new investments
- - Costs of the CSA
 - Disturbance to passengers

Contact

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