

RAILWAY STATION

Attachment 1: A Strategy for Improving Public Transport Customer Information

Public transport customer segmentation

A summary of insights to date / March 2017



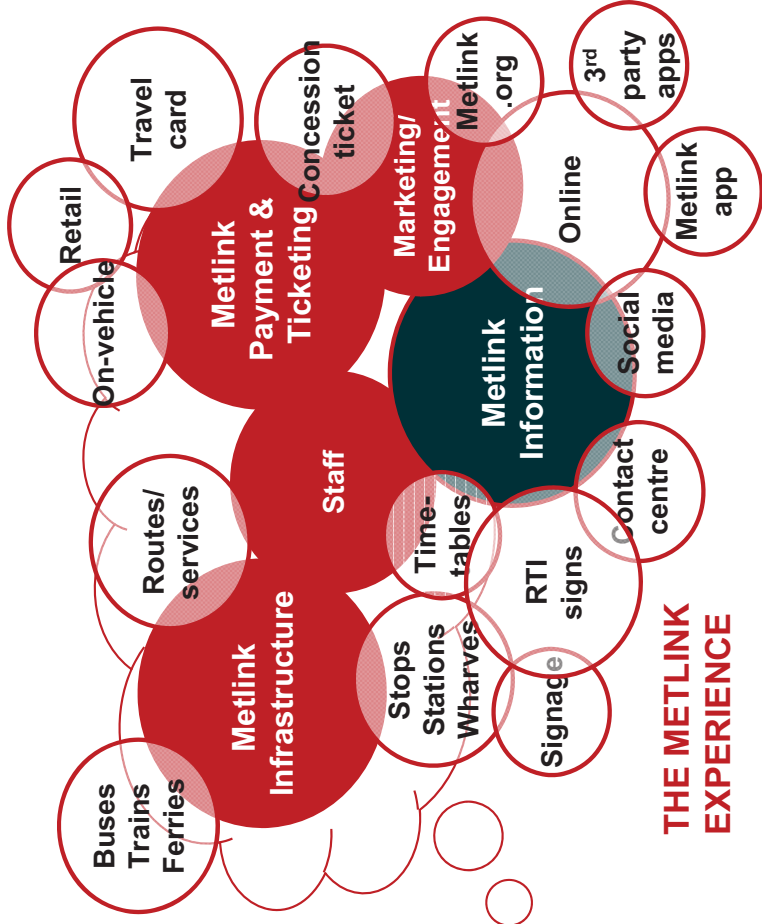
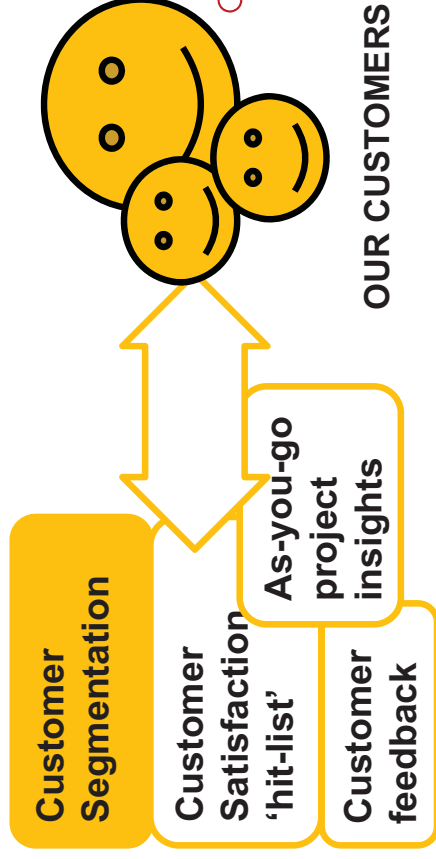
David Boyd, Customer Experience Leader



greater WELLINGTON
REGIONAL COUNCIL
Te Pane Matua Taiao

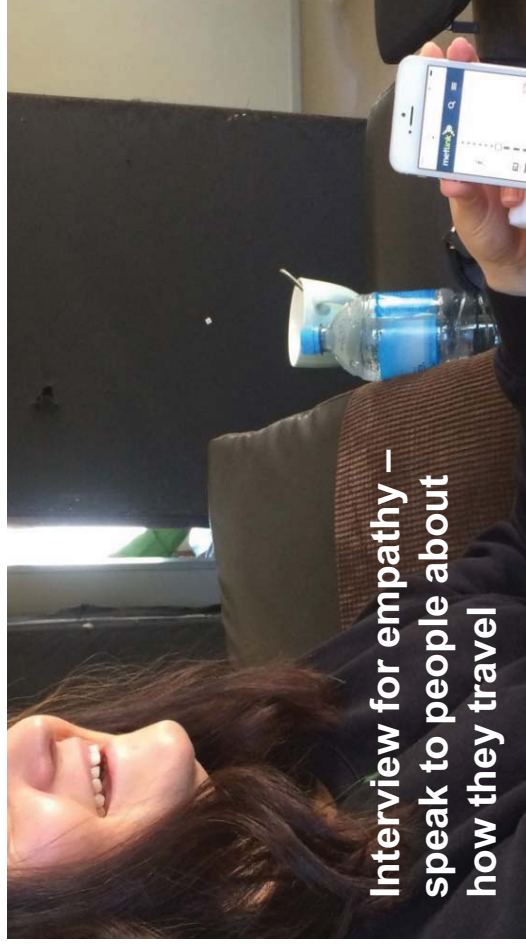
Customer segmentation objective

FRAMEWORKS to understand and manage the customer experience



- To make sense of how our different customers best interact with the many touchpoints they encounter on their journey
- Aim is to understand customer needs and plan, prioritise and target improvements to the PT customer experience and grow patronage.

Segmentation approach



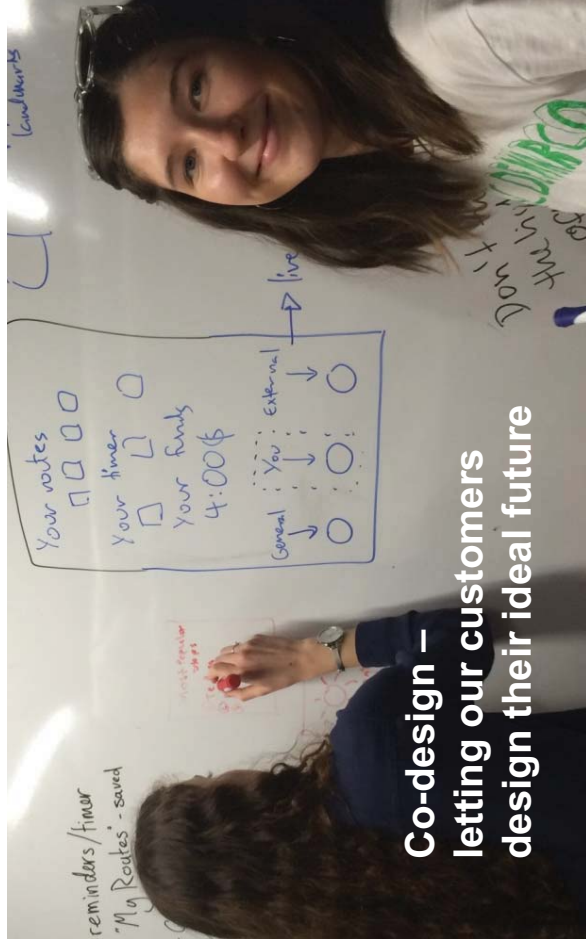
**Interview for empathy –
speak to people about
how they travel**

16 in-depth in-home interviews



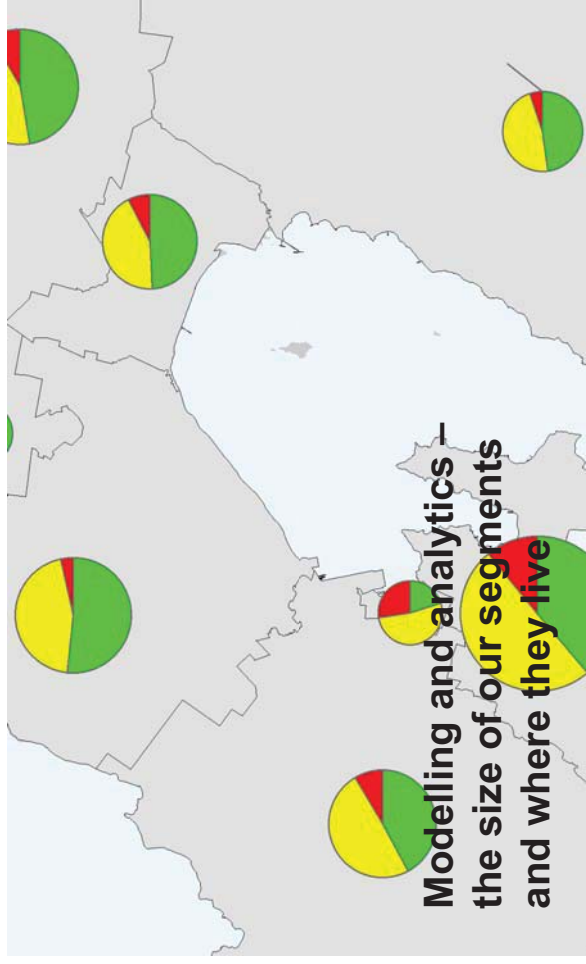
**Journey mapping –
how travel is experienced
through a day**

2 customer workshops, 36 participants



**Co-design –
letting our customers
design their ideal future**

2 co-design workshops, 24 participants



**Modelling and analytics –
the size of our segments
and where they live**

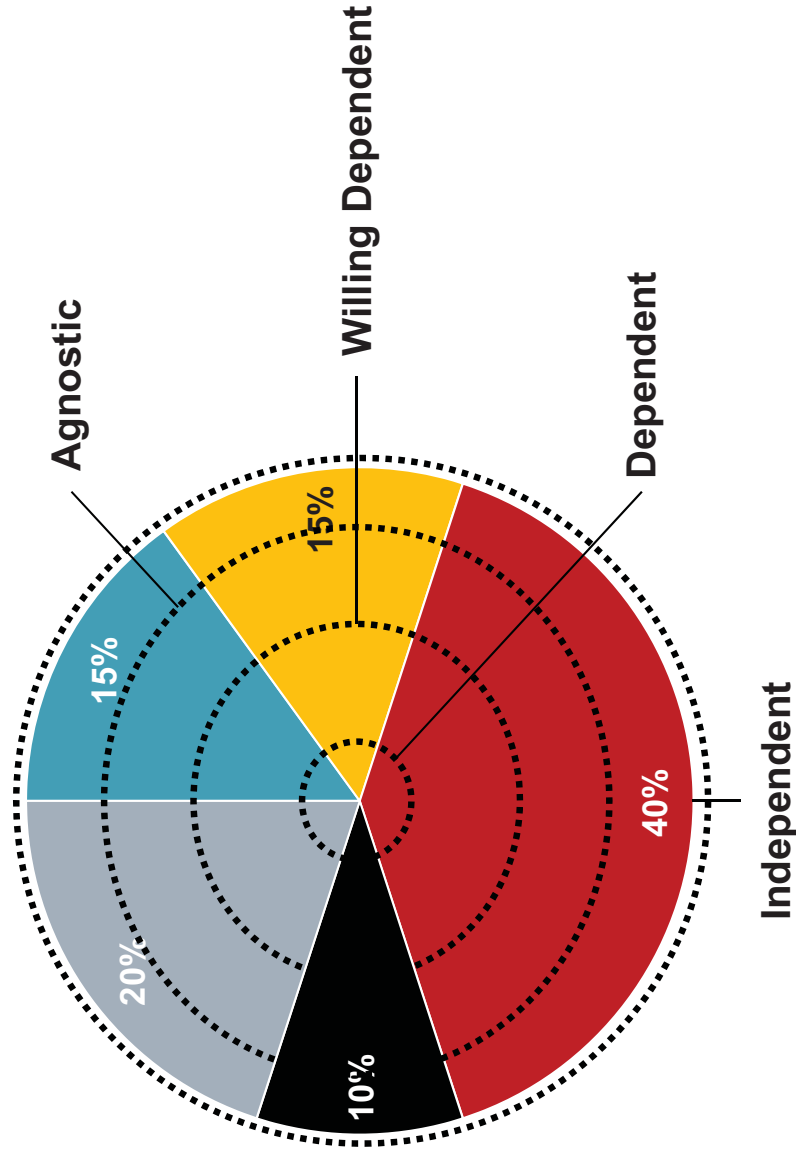
Working with the GWRC Transport Modelling team

The segments at a glance

Customer Segments

- School student
- Tertiary student
- Working adult
- Non-working adult
- Retired

So far, 2 life-stages that make up most of our peak travel population have been studied – Tertiary students and Working adults.



All numbers are estimated



The segments at a glance: Dependents

Customer interview Tyree

Dependent

Daily travel: multiple connections

- » Female, 20's living in Titahi Bay, Porirua Wellington
- » Fourth year Design Student
- » Lives at home with family
- » Conscientious and empathetic

What does she think of public transport?

Generally has a neutral image of public transport, yet it plays a big part of her day. She says she is not sure she will use it once she gets a job as a "professional", but for now it is a good option. She follows the same journey each day regardless of her daily activities as it makes things seem easier. Public transport tends to define her day and she makes things fit around travel times. She experiences frequent delays to her journey which means she doesn't feel confident in using public transport when her situation changes. She allows 90 minutes each way for a trip that take 20 mins by car. She expects buses, and sometimes trains, to be delayed so factors in extra time to accommodate the uncertainty. There is an element of resentment because of this - "it really can waste my time."

"The journey defines how my day is going to be; arriving stressed and late, or calm and ready for the day when on time... It all depends on whether my travel is smooth or delays cause me to rush!"



Positive

Community/social empowerment. We're all equal, we are in this together; builds empathy, pride and compassion.

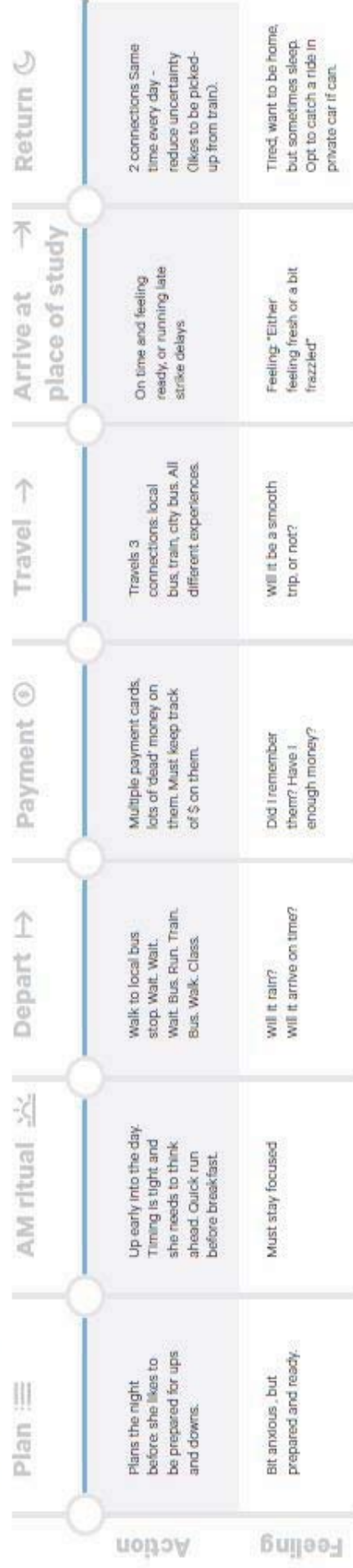


Negative

Uncertainty and inflexibility; can't trust that it will be smooth; delays have a major impact on my day; driver contributes to this.



Tyree's Journey



The segments at a glance: Willing Dependents



Customer interview Oliver

(Willing) Dependent

Daily public transport user

- » Male, 30s. Lives in Carterton, Wairarapa with his wife and three daughters. He commutes to Wellington daily and works out of the CBD.
- » The train is his primary public transport mode.
- » Once lived in Wellington, but moved to buy a house and offer a better lifestyle for his family.

What does he think of public transport?

"We used to live in Newtown four years ago and we were just starting a family. My life at that time was very local and was generally pretty good. Our next child came along and we saw a beautiful house in Carterton and with the train it meant that life was cheaper over there and that we could own our own house. It gives us flexibility to improve our house; it gives us space; and is the same price as renting in Newtown.

We factored in the train as part of our decision to buy a house. Our bank manager suggested it to us when we first tried to get a mortgage. When the trains aren't working it is horrible. Storms change things, but these are manageable and we get the lifestyle that suits us. My children are happy having room to move and we can afford to live on one income. Were happy and it is a small compromise for me. I'm in a routine with my travel. I enjoy the train. It gives me time to work and time to relax - there is a sense of family from the regular commuters. I then choose to bike from the station to my work place. It is only 15 mins from there and I am in the office. I prefer to cycle along the waterfront as it enhances my journey and gives me a chance to transition into my day. The only downside is it is pretty ridged and I can't really be spontaneous, but I've adjusted and it suits our family best."



Positive

Trains provide certainty and access to work in Wellington. The transport fare and mortgage is still less than what they would have paid if still living in Wellington central.



Negative

It can be a long journey and hard when he is feeling tired. Whilst infrequent, when the train is cancelled or delayed the outcome is extreme - no train, then there is no chance of going home that night. He instead stays with friends.

"One of my biggest challenges is deciding what to wear in the morning. It can be a beautiful day in the Wairarapa, but terrible in Wellington. I've got much better at planning for whatever the weather can throw at me."

Oliver's journey



Action

Feeling

The segments at a glance: Agnostics

Customer interview Emma

Agnostic

Occasional public transport depending on the task

- » Female, 20's living in Newtown. 5th year Massey uni Student.
- » Flattening with 3 other students. From Gisborne & lived in Wellington as a child.

“My journey to Uni is weather dependent. On fine days I will mostly walk and when it's raining I'll take the bus. There are lots of buses from my stop but during the peak they are crammed and 'germy'.”

What does she think of public transport?

Mostly walks & takes bus to uni, depending on weather - weather is biggest factor in decision. Takes bus approx. 3 - 4 times / week if going into city or Kaiwharawhara to get uni supplies. Enjoys walking and would walk up to 1 hour.

Is only flatmate with car but only uses it to go to work; further afield for supplies; trips out of town (eg. back to Gisbourne) & transporting lots of stuff to uni. Doesn't take car into city because of hassles with parking cost & logistics so takes bus (cheaper). Finds that bus is crammed, dirty & 'germy', especially during peak. Uses hand sanitizer when taking bus.

Observes no one wants to sit next to each other on bus - people like their own space. People also like to have something to do, read, check emails etc. Doesn't want to be on bus for too long, finds it awkward & dirty. Cost & convenience impacts type of transport she takes eg. bus vs. car - wouldn't take car in future, would continue to use bus & walk

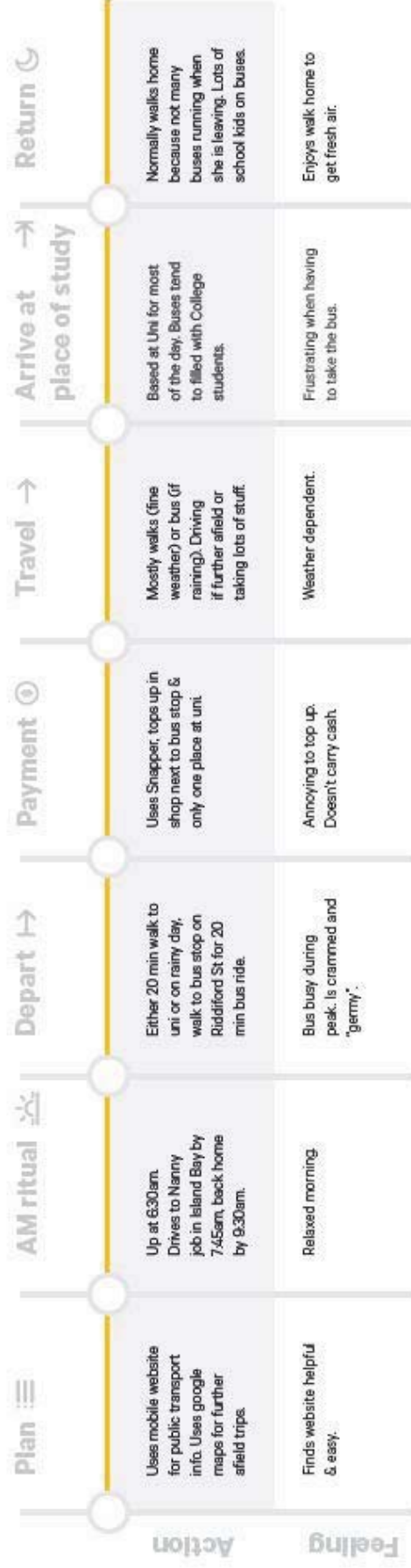
Positive

Likes that there are lots of buses through Newtown and thinks cost is reasonable when using Snapper. Finds it easy to use and safe to travel around city.

Negative

Experience is crammed, dirty and 'germy'. People like their own space and don't want to sit next to each other - can be awkward & annoying when very full during peak. Some rude & erratic drivers.

Emma's Journey



The segments at a glance: Independents



Customer interview Steve

Uses private transport regularly throughout the day

- » Male, 50s
- » Lives in Whitby with wife and three grown children
- » Sales Consultant based mainly in Wellington CBD
- » Travels by car, rarely uses public transport car



Positive

"The train service is really good. Trains are quite modern. Their reliability seems to have worked itself out. You can work, read or sleep. I use them when I've been out and can't drive home or get Dial-A-Driver."



Negative

"It's around flexibility and time is (a bit of) money. Bus-train-bus is a number of steps. It's just a bit of a hassle getting on and off and just too slow."

What does she think of public transport?

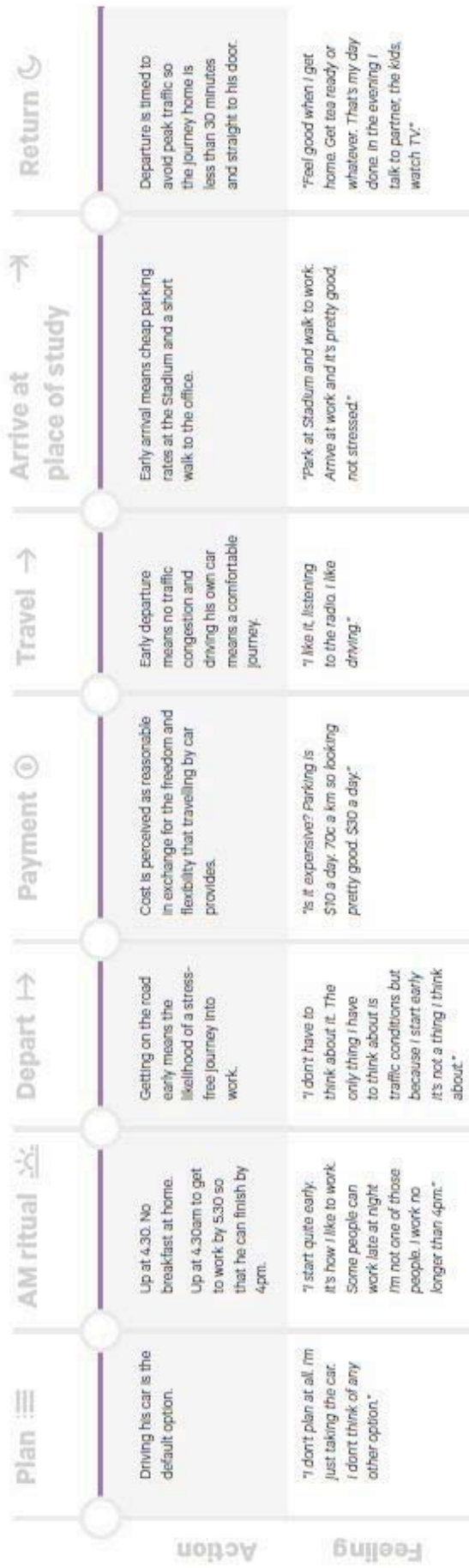
As a sales person, Steve has always relied on a car to visit customers. He continues to drive to work and his choice of transport is motivated by ease and comfort (one mode of travel and he can listen to the radio). He sees the cost of driving as reasonable. On the occasion when he has to use public transport (eg post-work socialising) he is comfortable working out how to use the trains but is confused by the bus system.

"I don't have a great understanding of what buses to catch. The timetable for trains seems to be a lot simpler, you're just looking at one train, but a bus at Courtenay Place, I don't even know what timetable to look at."

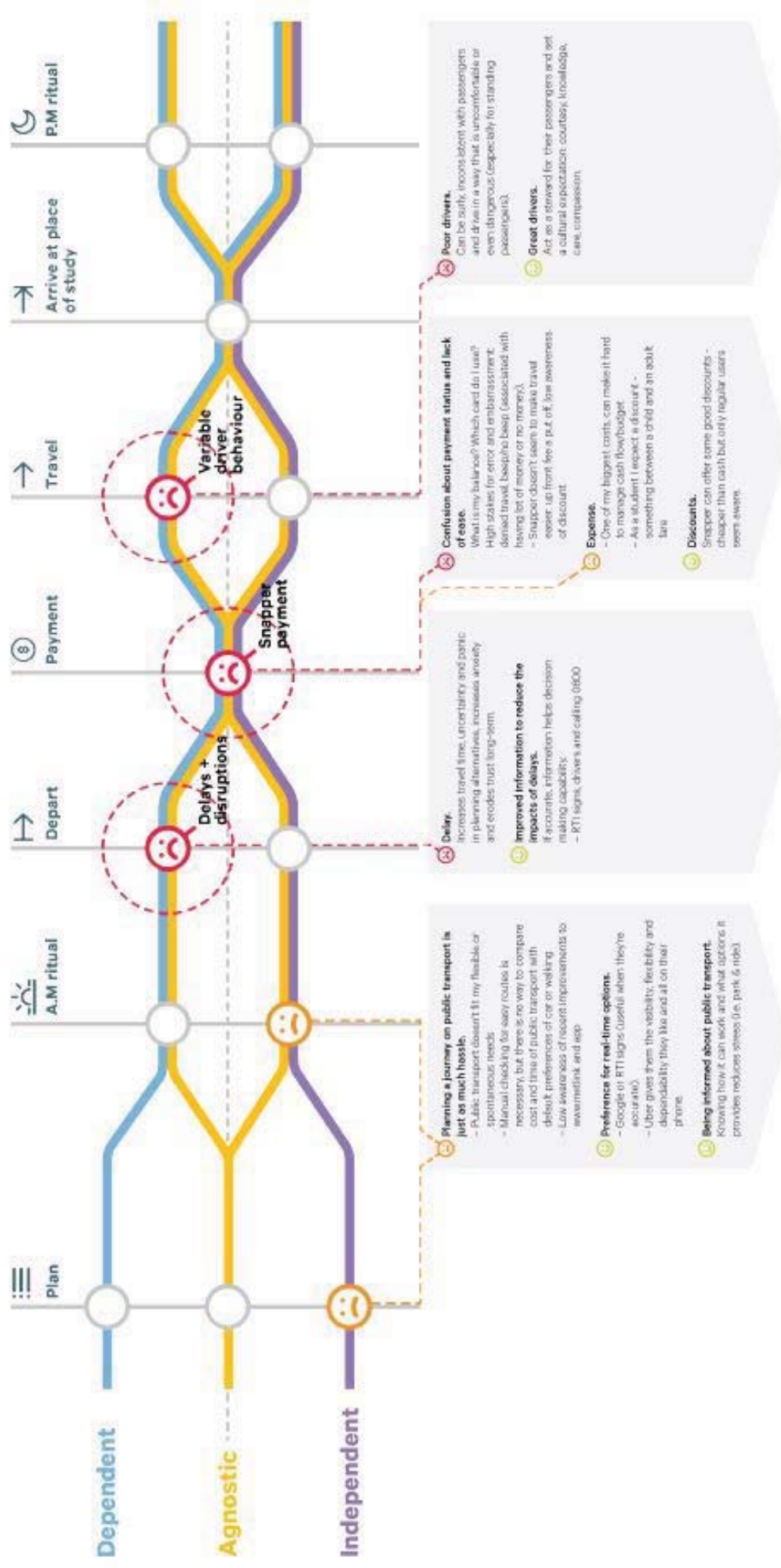
"If I looked at public transport, I'd look at taking the 'train-thing', but I've got to park my car somewhere. Depending on when you get there most of its uncovered so you're going to get wet. It's just not a pleasant experience."

Independent

Steve's Journey



Customer journey map: Student needs and opportunities



Opportunities identified:

Responsive information

How might we provide targeted and tailored information, so that students can make an informed on-the-fly travel decisions that include public transport.

Information about delays and disruptions

How might we provide better real-time information to alert passengers to delays and disparities in the planned schedule?

This validates current online work at CW for commuters and as a result wasn't explored further.

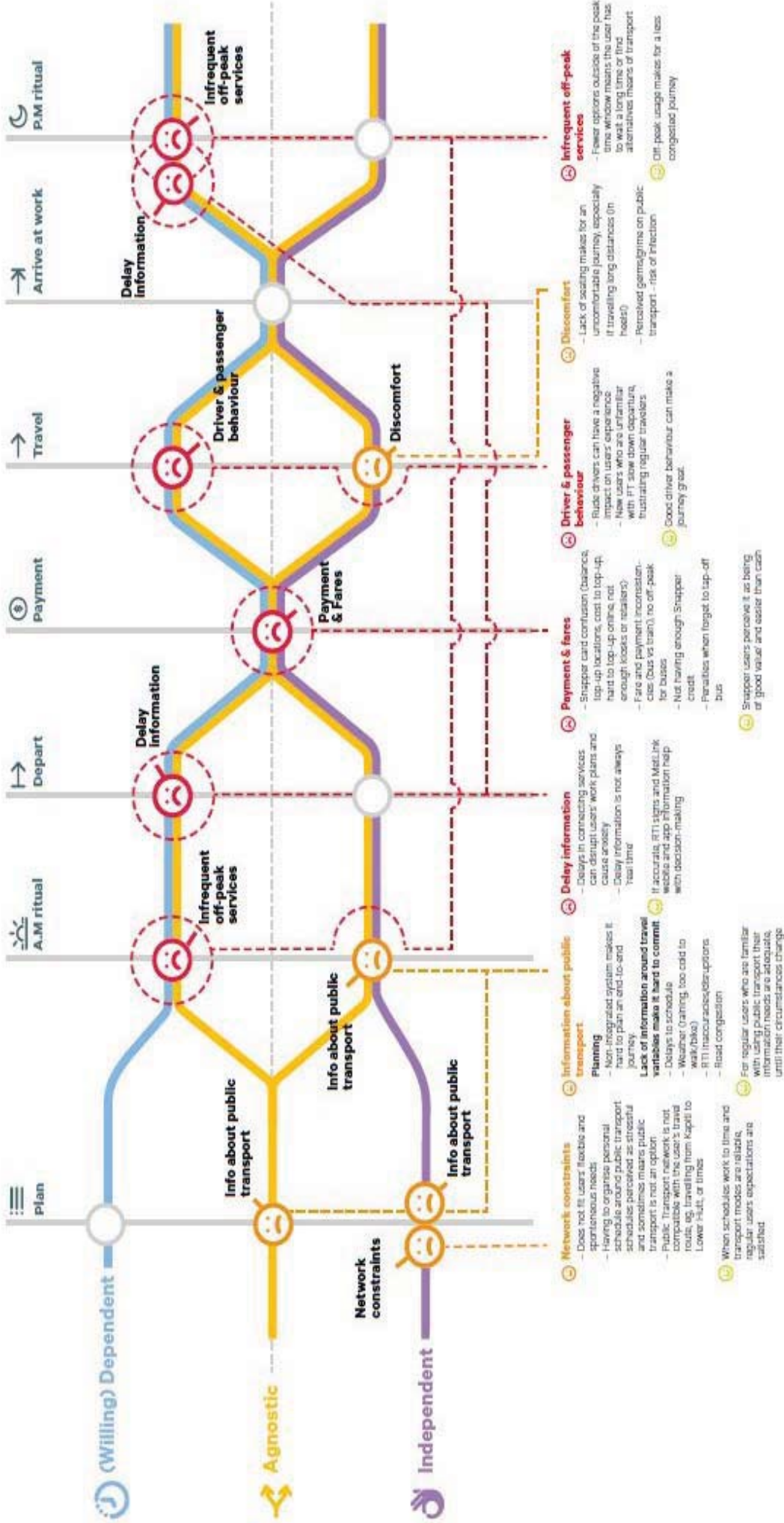
Smart payment

How might we make the Snapper experience for public transport easier and more rewarding for students?

Driver culture

How might we create a role that incentivises drivers to be a steward of their passengers' travel experience?

Customer journey map: Working Adult needs and opportunities



Opportunities identified:

Network constraints

How might we enable public transport to provide users with a seamless end-to-end journey that accommodates their changing needs?

This validates current continuous improvement work at GWRC for commuters and as a result wasn't explored further in workshops.

Easier & more responsive information

How might we deliver really real-time information that is customised, relevant, and easy to access?

This was explored within the Working Adults workshops.

Delay information

How might we provide better real-time information to alert passengers to delays and disparities in the planned schedule?

This validates current continuous improvement work at GWRC for commuters and as a result wasn't explored further in workshops.

Payment & fares

How might we make it easier to pay and get information to help manage my payments?

This was explored within the Working Adults workshops.

Driver & passenger behaviour

How might we create a role that incentivises drivers to be a steward of their passengers' travel experience?

This validates current continuous improvement work at GWRC for commuters and as a result wasn't explored further in workshops.

Discomfort

How might we provide a more comfy table and cleaner experience for users?

This validates current continuous improvement work at GWRC for commuters and as a result wasn't explored further in workshops.

Infrequent off-peak services

How might we adapt services to allow flexibility and variety of options for users outside peak times?

This validates current continuous improvement work at GWRC for commuters and as a result wasn't explored further in workshops.

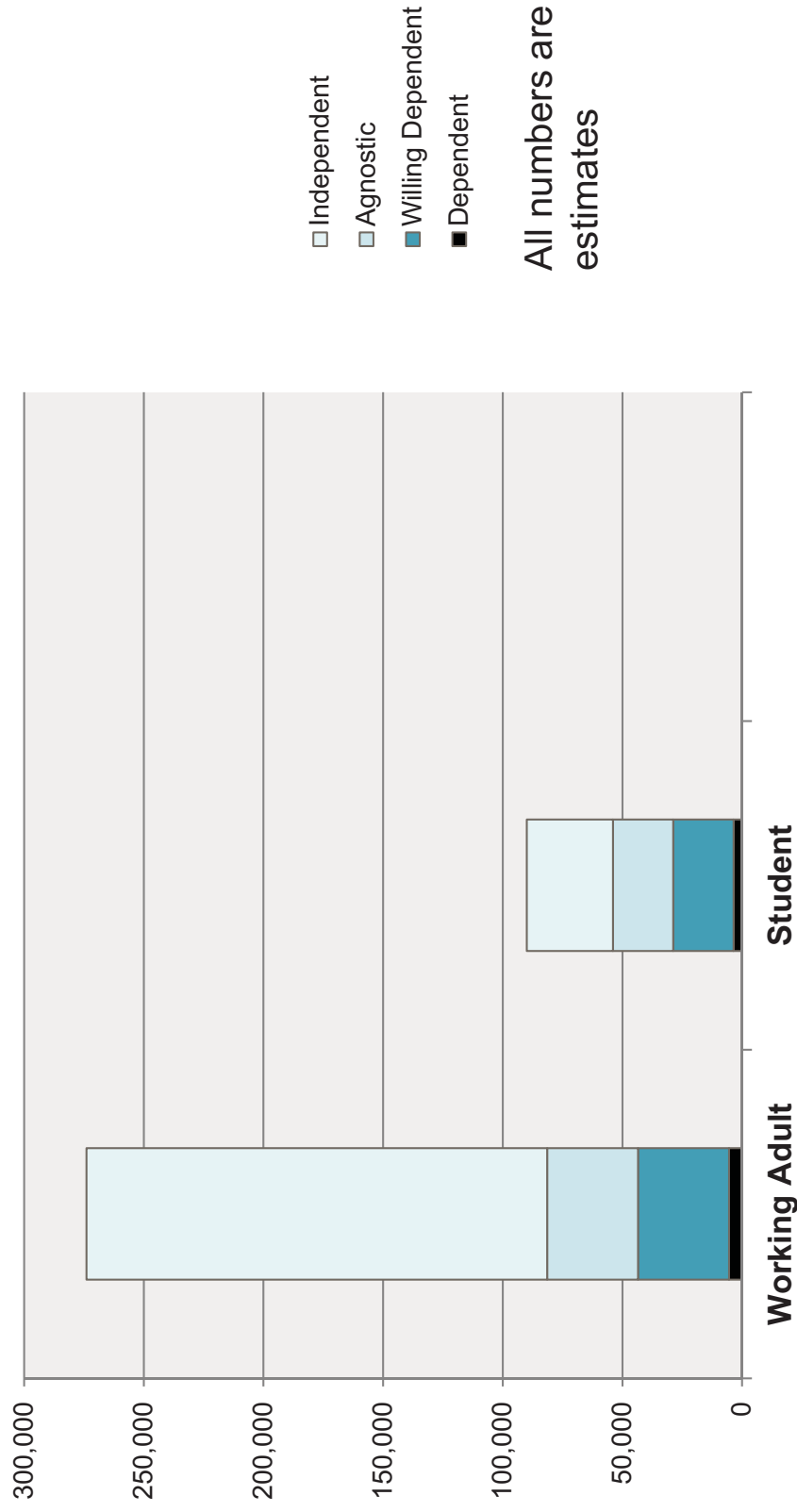
The segments at a glance

Dependents		Willing Dependents		Agnostics		Independents	
Student	Working adult	Student	Working adult	Student	Working adult	Student	Working adult
c.3,500 (5%)	c.5,500 (2%)	c.25,000 (28%)	c.38,000 (14%)	c.25,000 (28%)	c.38,000 (14%)	c.36,000 (40%)	c.192,000 (70%)
Mostly Zones 3 and beyond* Seek routine, limited options	Mostly Zones 3 and beyond* Seek routine, limited options	Mostly Zones 3 and beyond* Seek routine, pragmatic	Mostly Zones 3 and beyond* Seek routine, pragmatic	Mostly zones 1,2 and 3 Seek flexibility, pragmatic	Mostly zones 1,2 and 3 Seek flexibility, socially conscious	Mostly zones 2 and beyond Seek flexibility, independent	Mostly zones 3 and beyond Flexibility, independent
Live at family home	Predominantly in areas of lower cost/subsidised housing	Live near PT corridors Kiss and Ride Regular morning hours Irregular evening	Live near PT corridors Park and Ride Kiss and Ride Regular working hours	Like walking and cycling Chose to flat for convenience	Like walking and cycling Chose to live closer to central city	Live at family home Chose to flat for convenience Can afford vehicles and taxis	Family car share Require flexibility for young children Subsidised parking Flexible working hours
Train/Bus	Train/Bus	Train/Bus	Train/Bus	Mostly bus Walk/Bike Drive	Mostly bus Walk/Bike Drive	Drive Walk/Bike Taxi	Drive

All numbers are estimates

Segment insights

- Most of our peak customers use us through choice
- Very few (less than 5%) solely rely on public transport for travel to work or study.



Segment insights

- Most of our regular customers (Dependents and Willing Dependents) are satisfied with the basic service we offer
- However there are some particular needs and expectations customers believe should be better met. The most significant relate to:
 - Awareness of, and access to richer travel information
 - Awareness of, and access to fares and payment information
 - Easier and more flexible ways to pay – an expectation of IFT
 - Improved and more consistent driver/guard behaviour
 - Longer peak windows and less peak crowding
- Our customers, especially newer ones (Agnostics and Independents) want more, easy to access information to make an informed travel choice and easier ways to pay.
- These customers are interested in making a more informed choice about the best way to travel delivered through a digital platform that allows both travel choice and payment
- **Payment and customer information are core customer experience assets in determining patronage.**

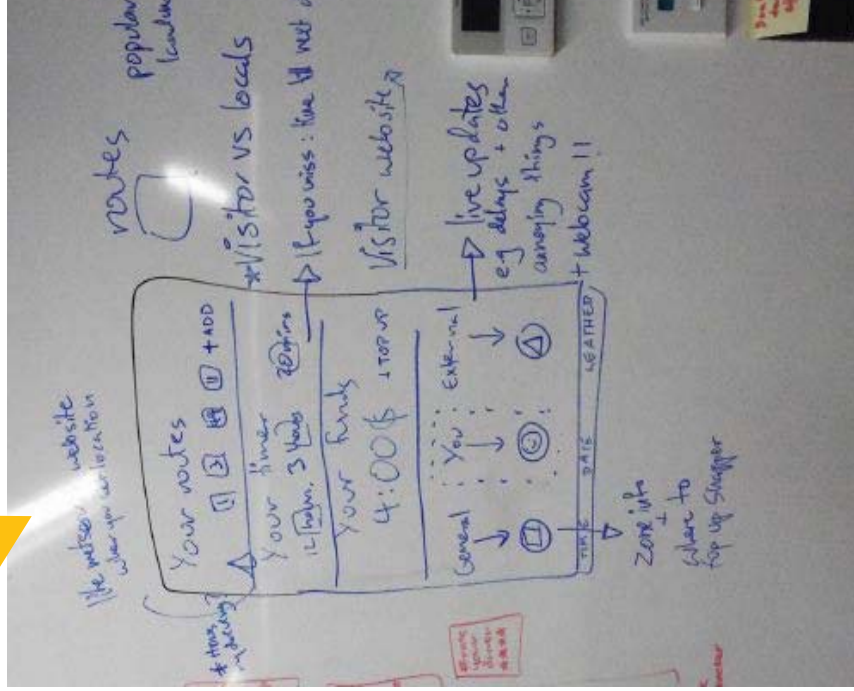
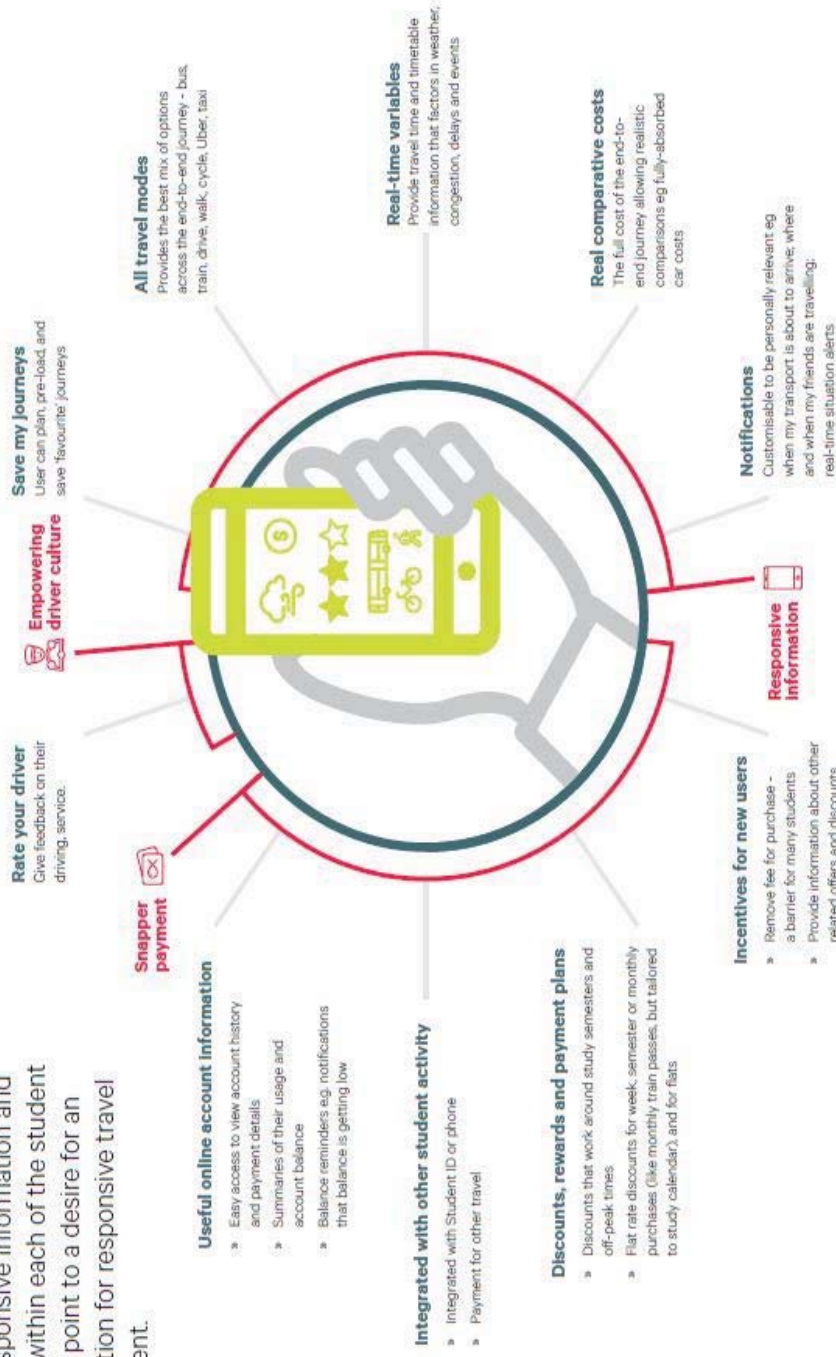


Segment insights: Future expectations

Responsive travel choices and payment

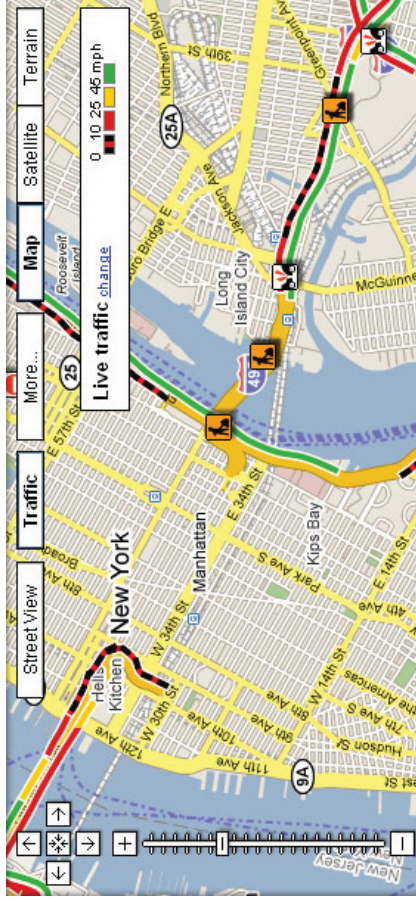
“It would be really good if there was some sort of Google app that told me when my bus was coming...”

There were clear overlaps of functionality (between payment, responsive information and bus driver behaviour) within each of the student groups which strongly point to a desire for an integrated, online solution for responsive travel information and payment.

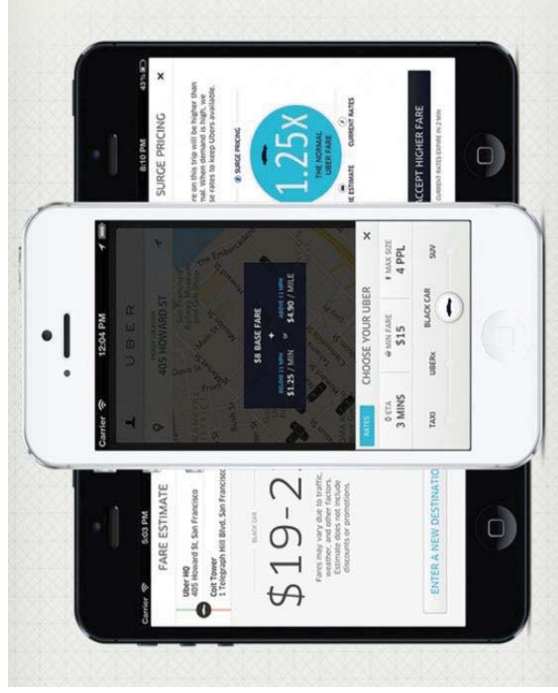


Customers' designs for integrating smart travel information and payment.

Insights: Market trends



Google Maps provides smart travel information based on real-time traffic conditions



Uber integrates booking, real-time information and payment.



UBER



MOBILITY AS A SERVICE
Fluid / Flexible / Pull (attract)

UBER-ISATION

Informed choice, improved responsiveness, options + flexibility

DISRUPTION
Digital platforms enable a multi-modal market for local transit



Embark is typical of many independent journey planning apps

Segment opportunities

CUSTOMER RETENTION

- Improve satisfaction for existing customers (Dependents, Willing Dependents and Agnostics)
- Make PT an ongoing preference for life stage segments (students) as they as they change (become Working Adults)
- Retain existing customers in the future in a more competitive transit market.

PATRONAGE GROWTH

- Grow existing markets (**'best bang for buck'**)
 - Increase Willing Dependent patronage off-peak
 - Increase PT patronage by Agnostics
- Increase market share - PT adoption by Independents.



PT customer information strategy

PT customer experience work has consistently identified customer information as a key factor for improving customer experience.

- Providing our less regular and new customers an informed choice about how to travel, with more accurate and smarter information, will encourage patronage growth
- Providing our regular customers with more accurate information (especially about delays and disruptions), delivered through a wider range of digital channels, will improve customer satisfaction and retention
- Providing open-source PT (RTI) data to be delivered by 3rd party providers will enable us to reach more customers in more innovative ways at a lower cost
- An open-source approach to managing our digital assets will enable us to easily integrate with 3rd party providers and adapt with future innovations and customer expectations.

