

yellowwood



MyCiTi Customer Insights Programme Summary Presentation



August 2014

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Why conduct a study in the first place?

Firstly, what is a tracking study?

A tracking study is

- ✓ Market research (interviews with the public)
- ✓ That happens repeatedly over time
- ✓ To monitor the performance of a product or service (experience or perception or feeling)
- ✓ In order to pick up and address issues as they occur

Why is it important to conduct one in the first place?

A tracking study

- ✓ Allows us to keep an ear to the ground among the commuting public so that
 - We can understand and address any issues that our users have with the service and the brand
 - We can understand and address any barriers (real or imagined) that those not using us have
 - We can tailor our actions (operational and marketing/comms) in a focused way to achieve our goals

Couldn't we just make an educated guess? We could butwe come from relatively similar context which is different from many of our commuters, so we will always frame things according to our context and not theirs



The what's and how's of the study

Overarching project objectives

A

Existing markets

(routes currently served – CBD, Table View, Airport, Woodstock/Salt River, Montague Gardens, Century City residential areas, Atlantic Seaboard, Melkbosstrand, Du Noon, Atlantis & Hout Bay)

- Gauge client satisfaction & experience across service touch points
- Measure the awareness and understanding of MyCiTi communications
- Measure the MyCiTi brand equity & monitor this over time

B

Future markets

(Short/Medium term: Mitchells Plain & Khayelitsha)

- Measure awareness of the intended service roll out & current levels of understanding
- Identify information gaps and needs
- Measure perceptions & expectations of the service
- Measure MyCiTi brand equity pre & post launch

Engager

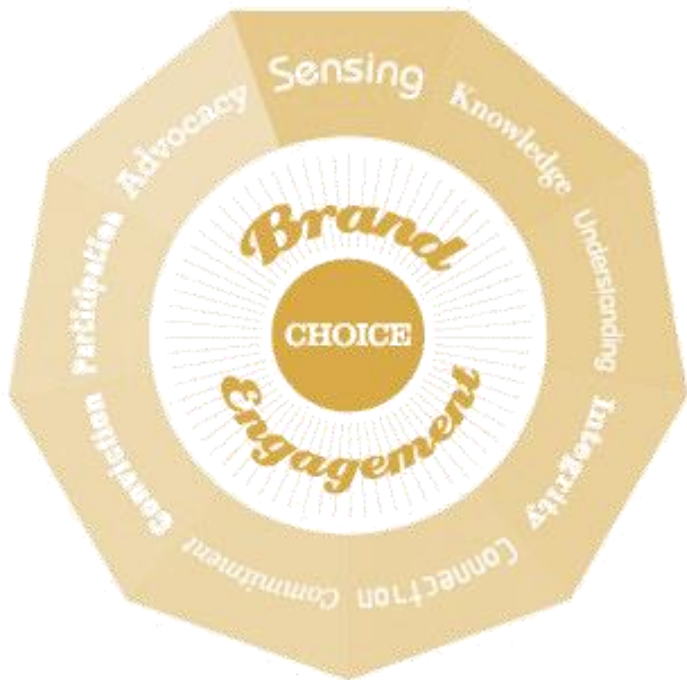
What is the Engager model?

Engagement:

How we define and measure it

Engager

Brand engagement describes a deeper brand relationship, one that is driven by an open, engaging and participatory conversation between brands and the people they want to talk to. It reflects new understanding and models of how brands and communications work.



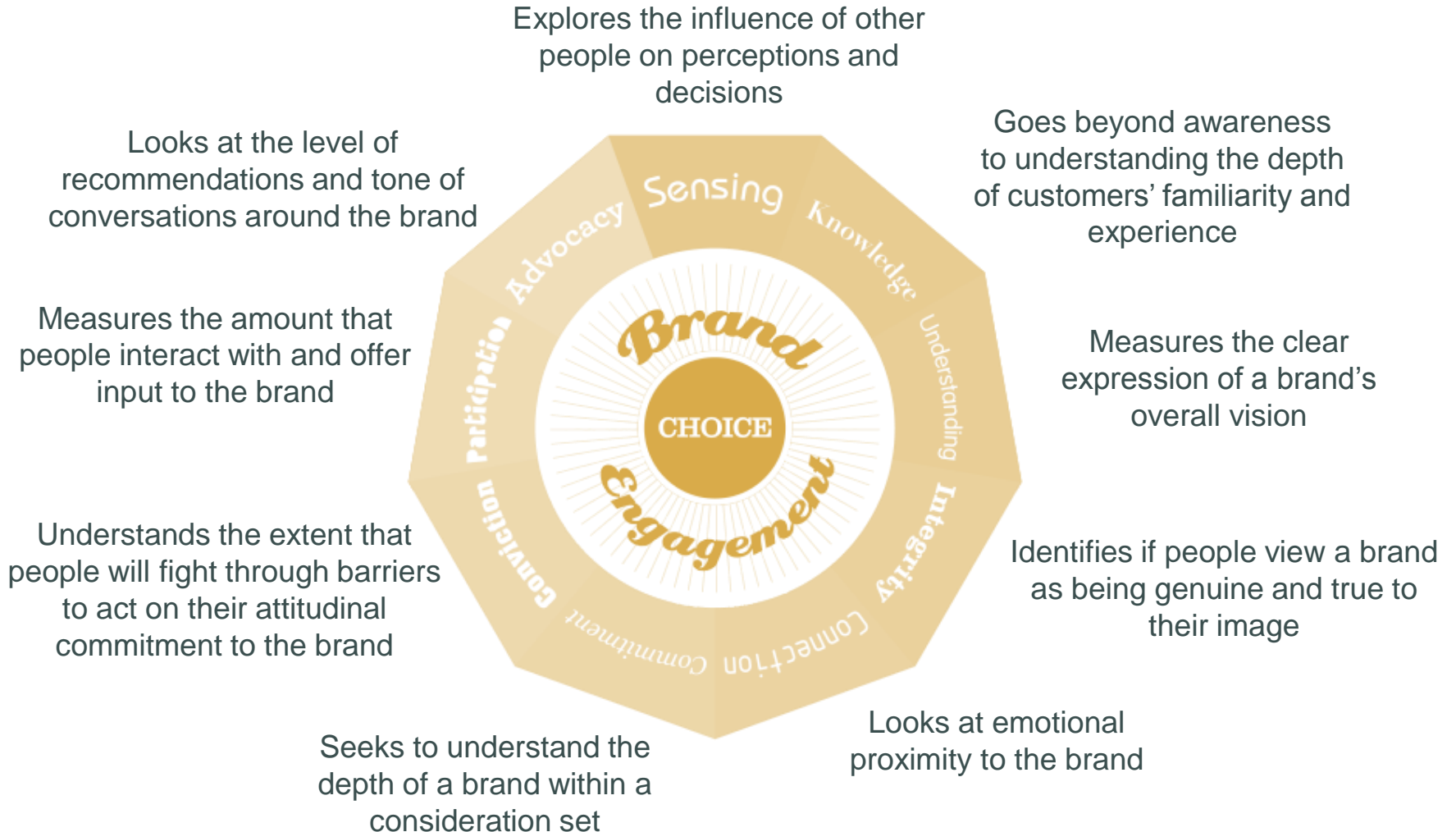
Engager is driven by five principles:

1. People's response to brands is primarily **unconscious, emotional and multi-faceted**
2. **Brand behaviour** is more important than brand attitude
3. The biggest influence on behaviour is the **behaviour of others**
4. **Open, participatory brand relationships**, involving a two-way dialogue, build stronger, deeper brand engagement, advocacy, sales and loyalty
5. Brand **advocacy** is more powerful than communication alone



Engagement:

What each dimension represents



Insights over time

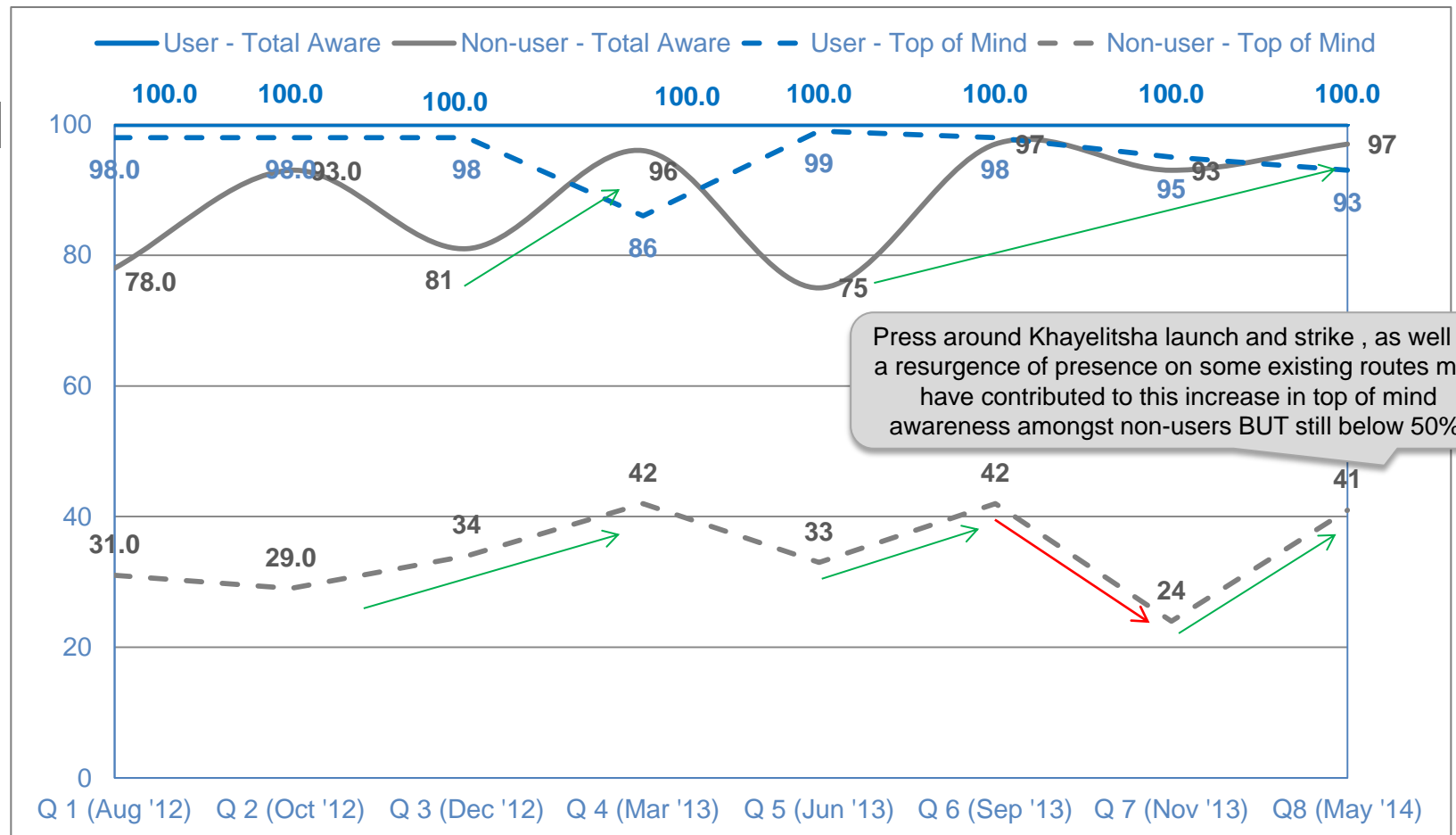
The presence of MyCiTi

Why do we want to know this?

- ✓ Users: Are we a true part of the fabric of their lives and the cityscape?
- ✓ Non-users: Are we top of mind so that if barriers are removed we are considered as a first alternative?

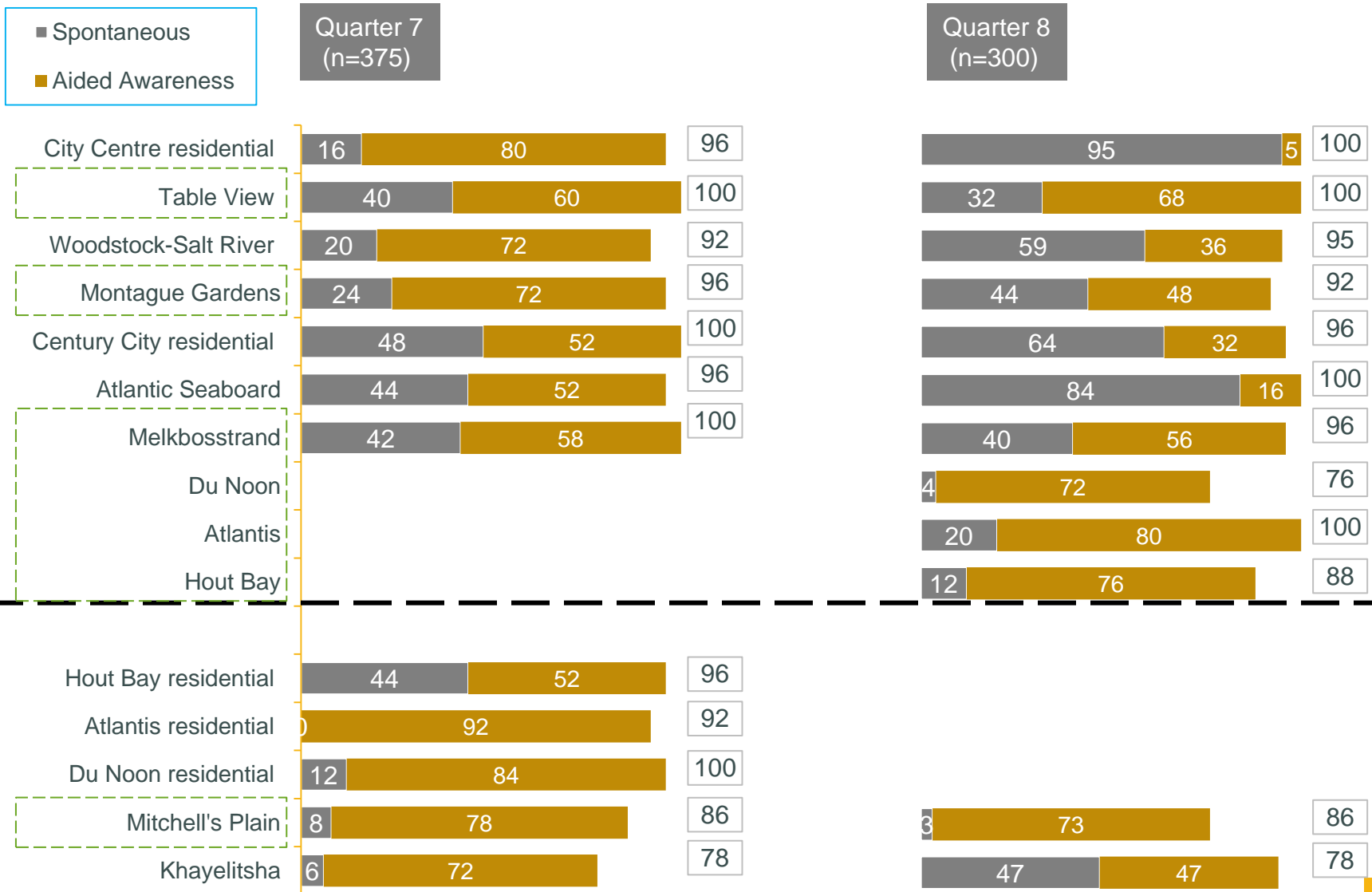
Awareness of MyCiTi over time

In the latest wave, top of mind awareness of MyCiTi among non-users has increased significantly



Non-user: Awareness of MyCiTi amongst non-users

Very low spontaneous recall of MyCiTi amongst non-users on current routes; Table View, Montague Gardens as well as on new routes such as Melkbosstrand, Du noon, Atlantis & Hout Bay



Key points

What are the key take-outs?

- ✓ User top of mind awareness remains stable at high levels
- ✓ Non-user top of mind awareness has improved, but there are still over 50% who do not have the service as top of mind
- ✓ Areas where top of mind awareness needs to be improved amongst non-users are Hout Bay, Du Noon, Atlantis and Mitchell's Plain

Uptake as a regular commute option

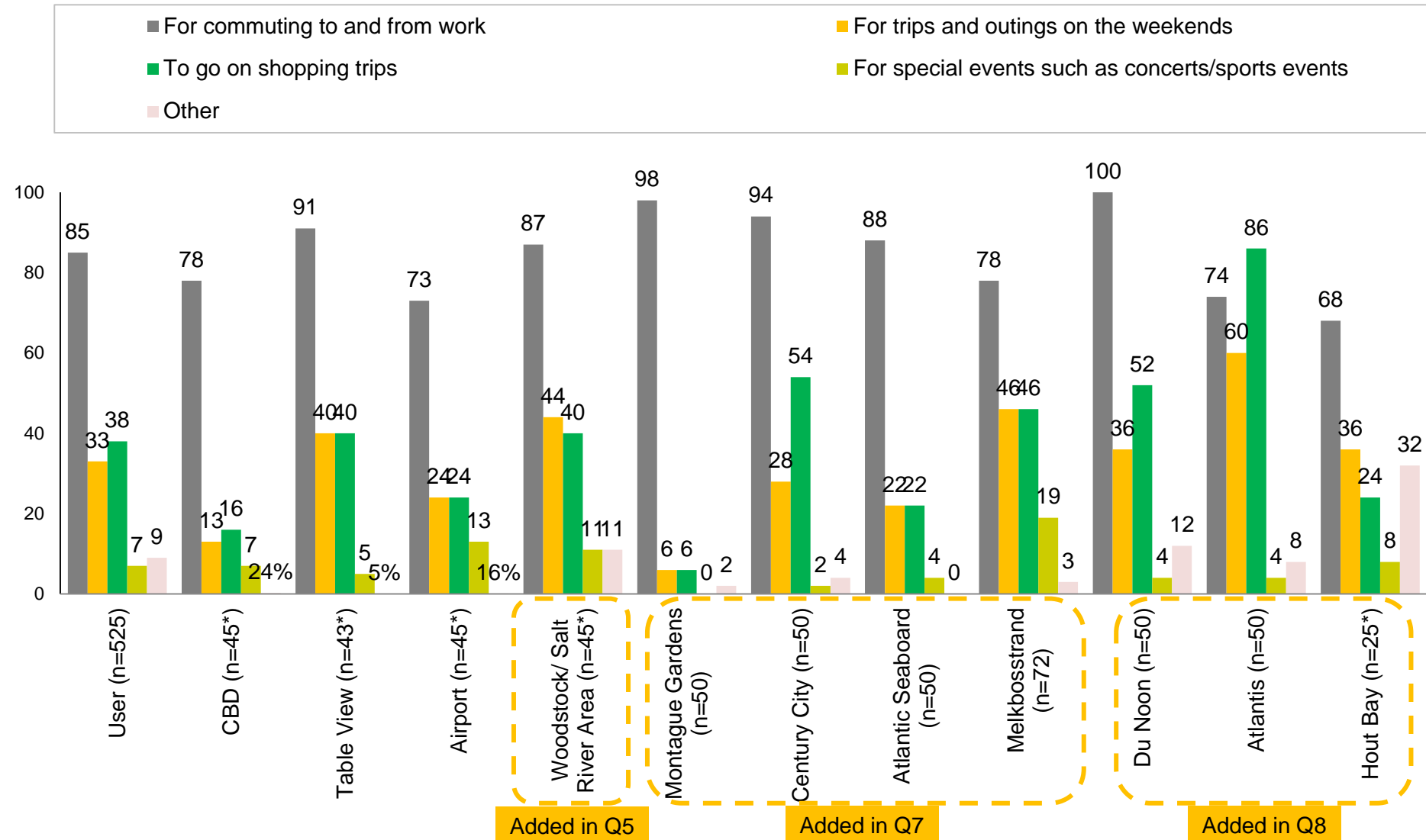
Why do we want to know this?

- ✓ Is the service being adopted as a regular part of commuter's daily lives or just as an occasional means of transport
- ✓ Regular commuting would mean the objectives of providing an alternative means of daily transport and a stable commuter base have been achieved

User: Purpose for current MyCiTi usage amongst users

MyCiTi is mainly used to commute to and from work in all areas but to a lesser extent in the CBD, Melkbosstrand, Atlantis & Hout Bay. There is an opportunity for MyCiTi to convince people to use the service for more than commuting to work and for driving use as a commuter service

Quarter 7 & 8



Source: Q3b: For which purposes are you currently using the MyCiTi bus service? Routes: Route respondent was recruited at *Caution: Small sample size

Key points

What are the key take-outs?

- ✓ Uptake of the service as a regular commuting option is strong and users are convinced that MyCiTi is the ideal transport option.
- ✓ However, there could be a stronger presence of regular commuters in Hout Bay – a need to investigate reasons for not taking up as a regular commute and determine whether there are actions that can be taken. If there is simply a lack of need, a smaller service could be considered. If there is a need, but the service is not being used, understand whether this is about scheduling or some other barrier.
- ✓ The service is currently attracting people away from private cars and Golden Arrow.

Who are we
competing with for
non-users?

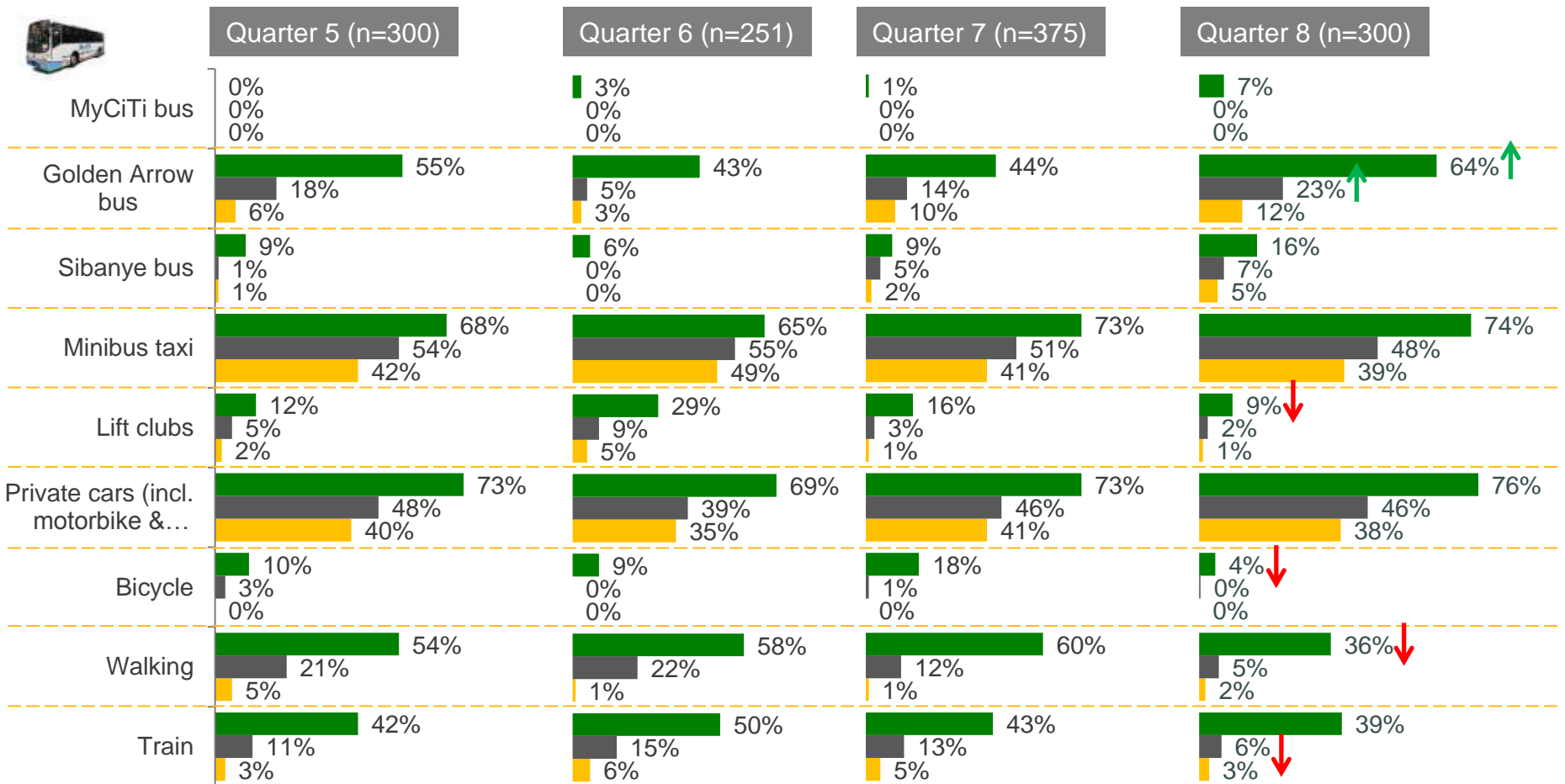
Why do we want to know this?

- ✓ Who we need to recruit commuters from will determine the type of barriers we will face and therefore the messaging we will need to use to convince them to change

Non-User: Use of transport methods

Key competitors remain private cars and minibus taxis. There has been an increase in the use of Golden Arrow this quarter. This may be attributed to issues with the train which has seen a decrease in use.

■ Ever used ■ Use nowadays ■ Use most often

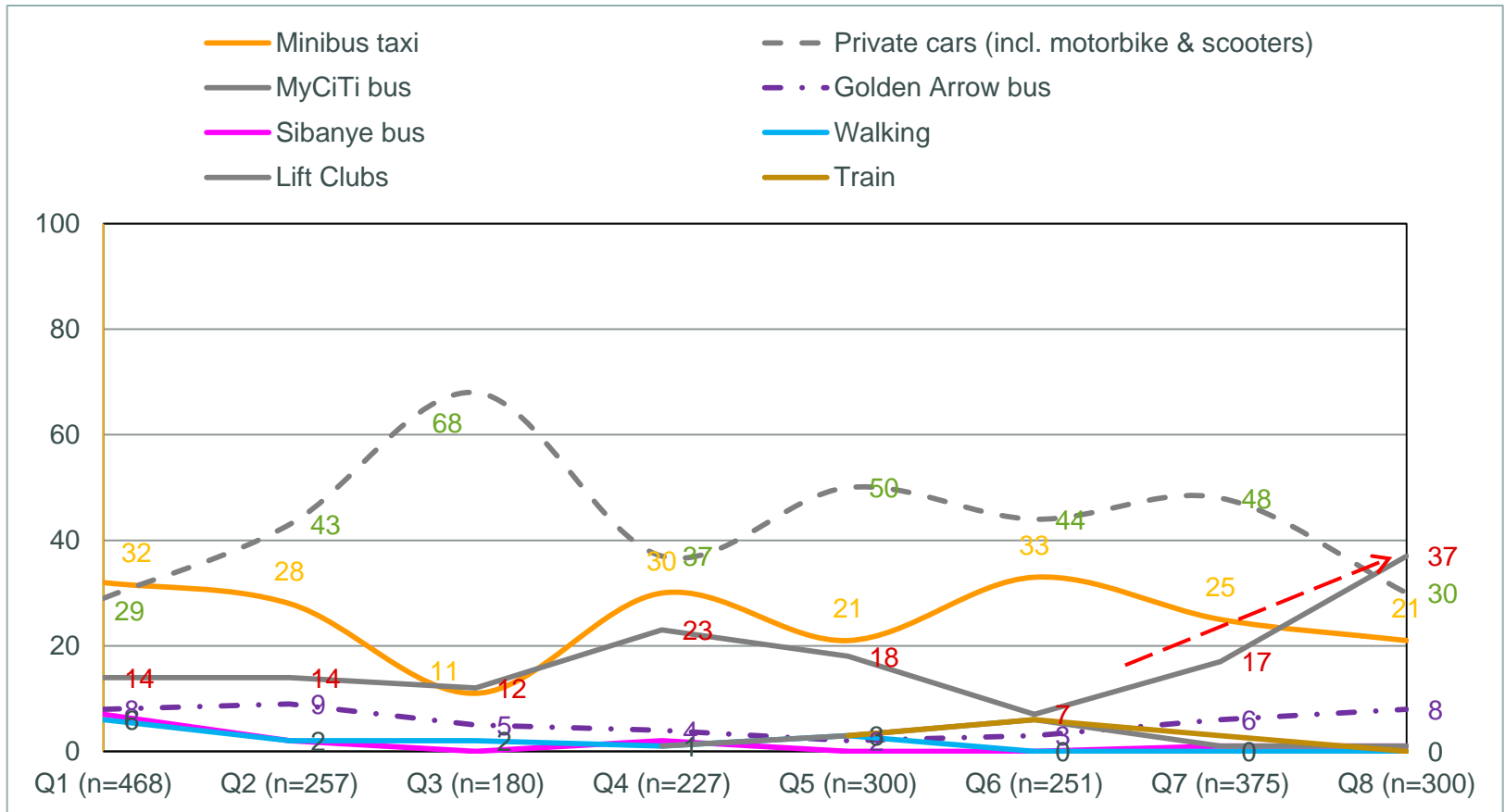


↑ Significant increase from Q7

↓ Significant decrease from Q7

Non-User: Ideal method

A positive trend in more people viewing MyCiTi bus as the ideal method of transport. Increased presence in the Khayelitsha area is likely to have driven this number up.



Key points

What are the key take-outs?

- ✓ Decreases in use of private cars and minibus taxi's suggests that MyCiTi is managing to attract people from these forms of transport.
- ✓ However, these remain the key acquisition targets.
- ✓ The issues experienced with the trains recently appears to have led to an increase in the use of Golden Arrow buses.

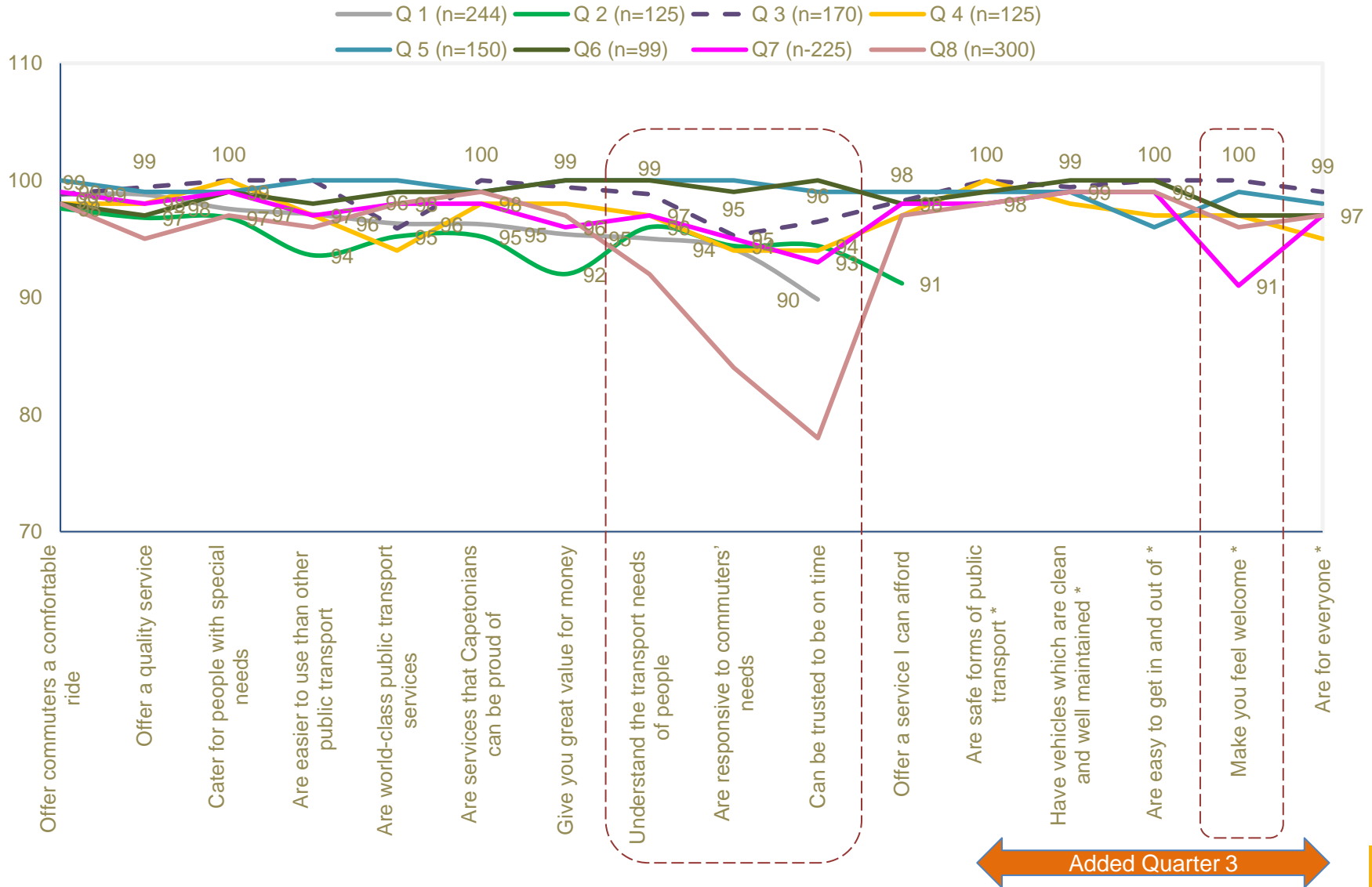
The experience of users

Why do we want to know this?

- ✓ We need to know whether users are satisfied and identify any areas of dissatisfaction that we need to address

MyCiTi User: MyCiTi Brand Association: Quarter 1 to 8

Being trusted to be on time is of particular concern since it has dropped below the 80% association mark this quarter.



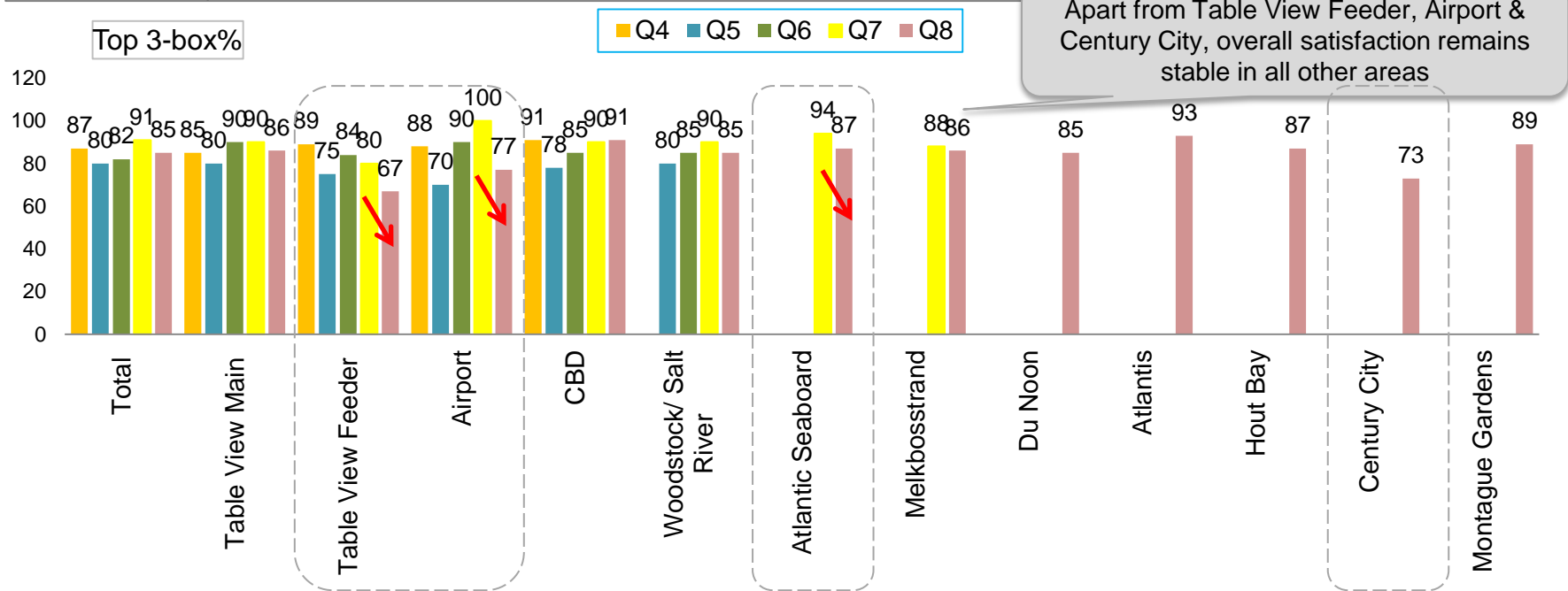
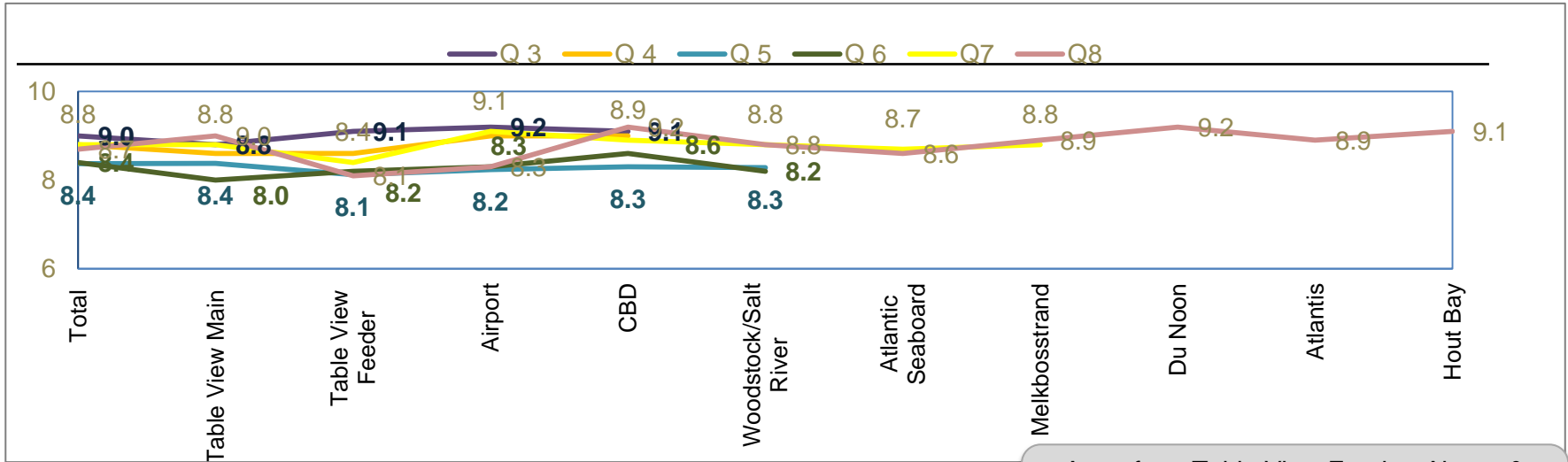
Added Quarter 3



Source: Q15: For each statement that I read out to you, please tell me which transport modes you would say it applied to?

User: Overall satisfaction with MyCiTi amongst users

ROUTES USE REGULARLY



Apart from Table View Feeder, Airport & Century City, overall satisfaction remains stable in all other areas


Source: Q5: Thinking about the experiences that you have had using MyCiTi bus service, please tell me how satisfied you are with each of the following?

*Caution: Small sample size


User: Satisfaction with MyCiTi amongst users – Scores out of 5

On the Bus

Rating Q8	Total	TV Main	TV Feeder	Airport	CBD	W/stck/ Salt Riv.	Atlan. Sea/b	Melk- bos	Du Noon	Atlantis	Hout Bay	Cent. City	Mont. Gard.
Overall Satisfaction	4.33	4.49	4.06	4.16	4.61	4.39	4.32	4.47	4.58	4.43	4.53	4.13	4.18
Ease of getting on/off	4.60	4.62	4.73	4.61	4.87	4.85	4.64	4.71	4.76	4.39	4.79	4.62	4.32
Feeling safe on the bus	4.60	4.67	4.59	4.73	4.76	4.79	4.52	4.75	4.70	4.36	4.65	4.71	4.32
Cleanliness	4.64	4.72	4.79	4.48	4.95	4.82	4.65	4.74	4.87	4.40	4.83	4.69	4.41
Appearance	4.60	4.70	4.77	4.43	4.80	4.82	4.65	4.76	4.84	4.44	4.72	4.64	4.42
Easy of travelling with young children/special needs	4.45	4.53	4.59	4.65	4.66	4.71	4.42	4.66	4.75	4.33	4.69	4.50	4.05
Comfort	4.59	4.66	4.62	4.52	4.87	4.88	4.53	4.82	4.76	4.35	4.72	4.59	4.35
Ease of travelling with parcels/luggage	4.55	4.56	4.71	4.67	4.76	4.74	4.65	4.72	4.74	4.37	4.79	4.54	4.20
Professionalism of driver	4.29	4.28	3.99	4.48	4.51	4.53	4.26	4.46	4.19	4.31	4.51	4.19	4.24
Arriving at destination on time	4.08	3.88	3.78	4.50	3.81	3.73	4.25	4.28	3.57	4.10	4.31	3.84	4.07

 4.80 or above – A real strength


 4.00 to 4.79 – Doing fine, no cause for concern


 3.99 or below – A cause for concern, needs addressing


User: Satisfaction with MyCiTi amongst users – Scores out of 5

At the station/site

Rating Q8	Total	TV Main	TV Feeder	Airport	CBD	W/stck/ Salt Riv.	Atlan. Sea/b	Melk- bos	Du Noon	Atlantis	Hout Bay	Cent. City	Mont. Gard.
Overall Satisfaction	4.33	4.49	4.06	4.16	4.61	4.39	4.32	4.47	4.58	4.43	4.53	4.13	4.18
Sufficient lighting at site	4.55	4.65	4.69	4.57	4.78	4.80	4.64	4.75	4.82	4.29	4.63	4.38	4.27
Cleanliness at site	4.59	4.61	4.77	4.59	4.86	4.82	4.70	4.72	4.77	4.28	4.77	4.58	4.27
Feeling safe while waiting	4.58	4.66	4.77	4.70	4.82	4.79	4.57	4.71	4.79	4.38	4.64	4.50	4.28
Bus fare charged	4.42	4.46	4.58	4.77	4.72	4.55	4.35	4.67	4.75	4.15	4.47	4.27	4.07
Availability of route/timetable	4.29	4.53	4.55	4.52	4.38	4.23	3.83	4.60	4.75	4.12	3.86	4.33	4.30
On time arrival and departure	3.90	3.66	3.73	4.34	3.41	3.27	4.11	4.10	3.43	3.98	4.08	3.62	3.97
Availability of MyConnect card facilities	4.22	4.29	4.59	4.64	4.59	3.92	4.00	4.42	4.63	4.15	4.13	3.74	3.89

 4.80 or above – A real strength

 4.00 to 4.79 – Doing fine, no cause for concern

 3.99 or below – A cause for concern, needs addressing

Key points

What are the key take-outs?

- ✓ Overall, while the issue of the professionalism of the drivers appears to have been addressed in most areas, there is some criticism around the on time arrival and departure of buses.
- ✓ Ease of travelling with children or disabled people is still something of a concern, particularly in the CBD and Du Noon.
- ✓ Routes where satisfaction has dropped are:
 - ✓ Tableview Feeder routes – issue with professionalism of bus drivers remains, ease of travelling with children/parcels and on time arrival and departure
 - ✓ Airport – issue with ease of travelling with children and people with special needs
 - ✓ Century City – Professionalism of driver remains an issue in this area, ease of travelling with children/special needs, on time arrival and departure and availability of recharge facilities
 - ✓ Atlantic Seaboard has also shown a decline, but the overall rating is still well above 80% and therefore still good

How are we viewed
versus other options
by non-users?

Why do we want to know this?

- ✓ We need to know what barriers exist for us versus other options so that we can remove them – what advantages do alternative options have that we need to own?
- ✓ What are our strengths (and competitor weaknesses) that we can capitalise on?

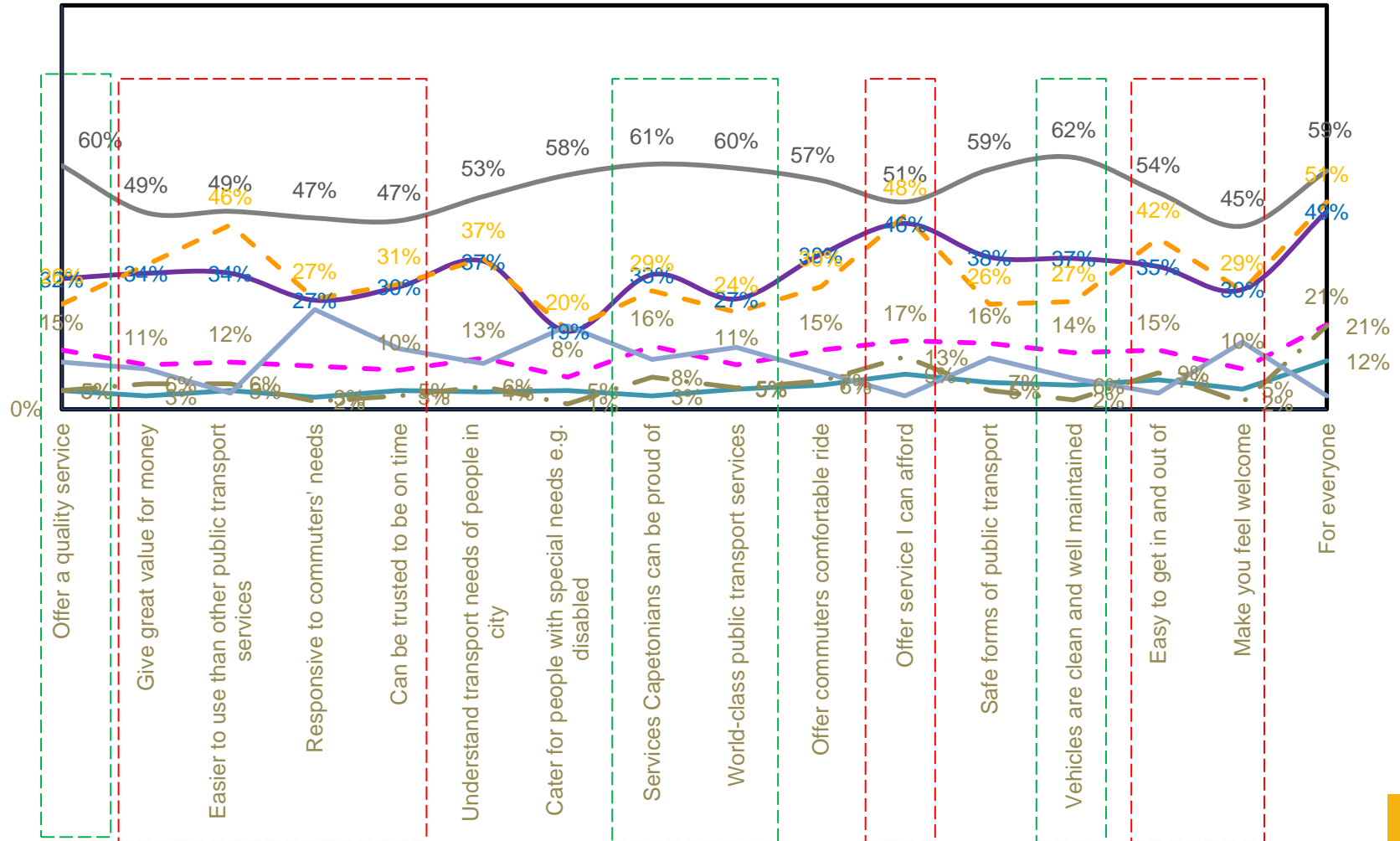
Non User: MyCiTi Brand Association: Quarter 8

Positive associations amongst non-users pertaining to quality service, a service Capetonians can be proud of, a world class public transport service and always clean/well maintained.

It is perceived not to be value for money, not affordable, not easy to get in & out of, not making you feel welcome & can't be trusted to be on time

Quarter 8
(n=300)

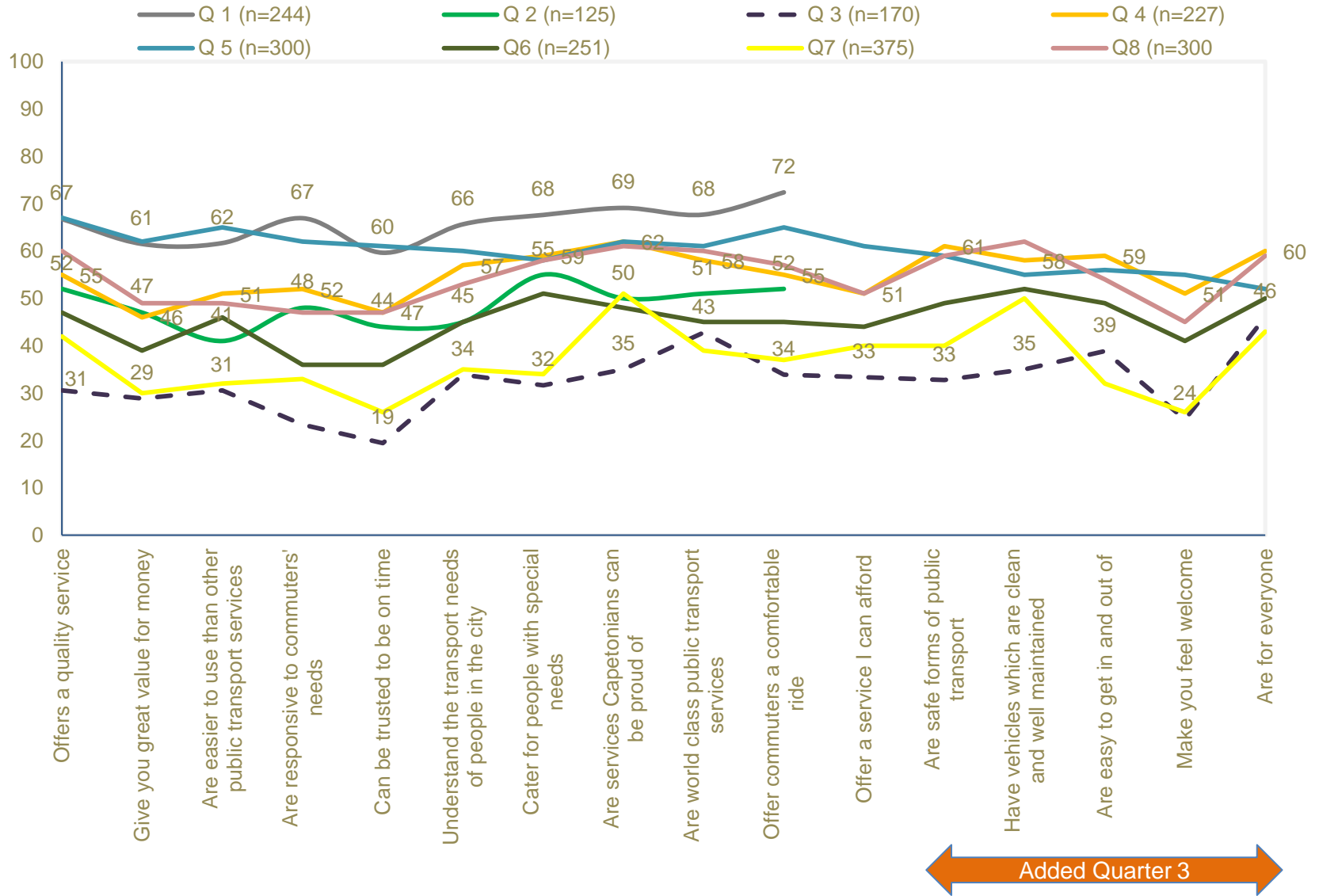
— MyCiTi — Golden Arrow — Sibanye — Minibus taxi — Lift clubs — Train — None



Source: Q15: For each statement that I read out to you, please tell me which transport modes you would say it applied to?

Non-User: MyCiTi Brand Association: Quarter 1 to 8

There has been an improvement since the previous wave



Key points

What are the key take-outs?

- ✓ Overall, MyCiTi is perceived more positively than other forms of transport
- ✓ However, the perceived affordability and ease of use remain something of a barrier for non-users

Are we engaging the
public emotionally?
Are we creating fans?

Why do we want to know this?

- ✓ The more engaged and emotionally connected a person is to a brand, the less likely they are to use a different one and the more likely they are to advocate for a brand, drawing in new users
- ✓ Non-users who are engaged are more likely to use the brand in the future and provide growth

Users: Unpacking Engagement

The airport route is showing signs of deteriorating engagement, particularly around the conviction with which users buy into the service and a resulting drop in advocacy. The three areas where a lack of trust seems to be growing are on the airport route, Century City route and Melkbosstrand. New routes doing well.

Q7 to Q8	MyCiTi Users	Table View Main Route	Table View Residential	CBD	Airport route	Woodstock/Salt Riiver	Montague Gardens	Century City	Atlantic Seaboard	Melkbosstrand	Hout Bay	Du Noon	Atlantis
Engagement	142 → 153	147 → 158	150 → 155	146 → 160	145 → 143	144 → 156	129 → 156	148 → 152	134 → 152	150 → 154	151	161	151
Knowledge	137 → 150	140 → 151	144 → 155	145 → 157	139 → 140	140 → 157	127 → 155	147 → 153	125 → 150	140 → 148	146	158	136
Understanding	127 → 143	132 → 148	144 → 147	132 → 154	129 → 126	126 → 155	109 → 143	132 → 140	114 → 144	140 → 136	148	153	139
Integrity	130 → 141	137 → 144	138 → 134	135 → 152	135 → 127	130 → 148	115 → 146	142 → 134	113 → 138	143 → 135	145	148	138
Commitment	121 → 130	127 → 133	127 → 130	124 → 132	118 → 127	119 → 130	114 → 140	130 → 126	127 → 125	123 → 134	124	140	125
Connection	149 → 152	154 → 150	147 → 155	149 → 154	147 → 149	148 → 150	148 → 161	152 → 150	155 → 156	145 → 149	157	155	144
Conviction	157 → 169	165 → 172	159 → 172	159 → 177	163 → 151	157 → 174	139 → 165	161 → 169	143 → 170	166 → 173	170	178	161
Advocacy	132 → 151	139 → 161	117 → 152	145 → 163	147 → 141	142 → 145	99 → 159	138 → 143	125 → 140	146 → 169	138	161	159
Sensing	121 → 145	123 → 150	145 → 154	129 → 156	127 → 147	122 → 150	108 → 140	130 → 143	107 → 148	131 → 147	141	156	139
Participation	180 → 158	189 → 188	220 → 156	180 → 137	192 → 115	219 → 148	187 → 150	156 → 177	173 → 139	203 → 160	139	142	222

Non-user: By route over time

Hout Bay, Du Noon and Montague Gardens are slipping across a number of pillars for non-users . This indicates that attracting non-users on these routes may be difficult. These areas should be of particular priority in communication for the brand.

Indices Q6+7 ▶ Q7+8	CBD	Table-view	Atlantis	Hout Bay	Atlantic Seaboard	Montague Gardens	Woodstock/Salt River	Century City	Du Noon	Mitchells Plain	Khayelitsha	Melkbosstrand
Engagement	100▶ 102	115▶ 119	91▶ 114	118▶ 110	86▶ 93	88▶ 74	83▶ 98	97▶ 107	83▶ 76	93▶ 99	78▶ 84	102▶ 108
Knowledge	88▶ 71	87▶ 80	70▶ 77	94▶ 75	77▶ 74	75▶ 58	71▶ 77	80▶ 82	65▶ 59	72▶ 69	61▶ 61	86▶ 83
Integrity	92▶ 109	113▶ 119	88▶ 117	118▶ 112	76▶ 94	81▶ 69	73▶ 104	92▶ 109	69▶ 61	97▶ 105	69▶ 87	102▶ 109
Sensing	94▶ 113	118▶ 122	77▶ 110	106▶ 105	82▶ 93	84▶ 75	82▶ 86	93▶ 104	70▶ 75	80▶ 86	63▶ 56	102▶ 109
Advocacy	98▶ 101	104▶ 126	82▶ 114	104▶ 100	84▶ 84	87▶ 76	82▶ 77	85▶ 94	80▶ 72	80▶ 88	72▶ 72	87▶ 101
Commitment	81▶ 79	91▶ 96	80▶ 95	97▶ 90	64▶ 76	64▶ 55	62▶ 83	80▶ 92	81▶ 65	77▶ 83	66▶ 71	81▶ 87
Conviction	118▶ 107	131▶ 138	100▶ 133	139▶ 130	104▶ 101	105▶ 91	100▶ 110	115▶ 124	98▶ 89	115▶ 119	96▶ 106	122▶ 127
Understanding	87▶ 92	110▶ 110	81▶ 108	109▶ 98	66▶ 74	73▶ 48	65▶ 88	82▶ 84	61▶ 52	74▶ 83	58▶ 78	92▶ 100
Participation	125▶ 114	113▶ 108	143▶ 129	146▶ 125	119▶ 112	128▶ 111	140▶ 141	128▶ 128	126▶ 125	119▶ 121	125▶ 119	140▶ 133
Connection	100▶ 103	120▶ 120	94▶ 111	120▶ 114	91▶ 103	92▶ 79	79▶ 100	99▶ 112	88▶ 84	100▶ 109	87▶ 94	90▶ 100

Planned routes; Mitchell's Plain & Khayelitsha added in Q5/ Melkbosstrand added in Q7

Key points

What are the key take-outs?

- ✓ Overall, engagement with MyCiTi has improved since the last wave
- ✓ However, there are some routes where issues are arising
 - ✓ For users, the airport route, Melkbosstrand and Century City are of some concern. Integrity (which means trust) has declined. The brand needs to focus on building trust on these routes. The airport route is of particularly concern where users are not entirely convinced and not advocating the service.
 - ✓ For non-users, Hout Bay, Montague Gardens and Du Noon are declining on almost all the pillars of engagement. This will impact the service's ability to attract new users in these areas and the brand needs to focus on engaging non-users in these areas.

Are we using the right communication tools and getting our message through?

Why do we want to know this?

- ✓ Using the right media for the right audience and tailoring our messaging accordingly makes our media spend more efficient and our messaging more effective

Total Awareness of Communication Tools

The top media for communication about the brand are similar across users and non-users of the service. Hearing about it from others tops the list, followed by community newspapers, flyers and local newspapers. Users of the service see the information to a greater extent though and are also more likely to find information about MyCiTi from shopping centre promotions, MyCiTi newsletter and online sources such as Facebook.

USERS Quarter 8 (n=300) %

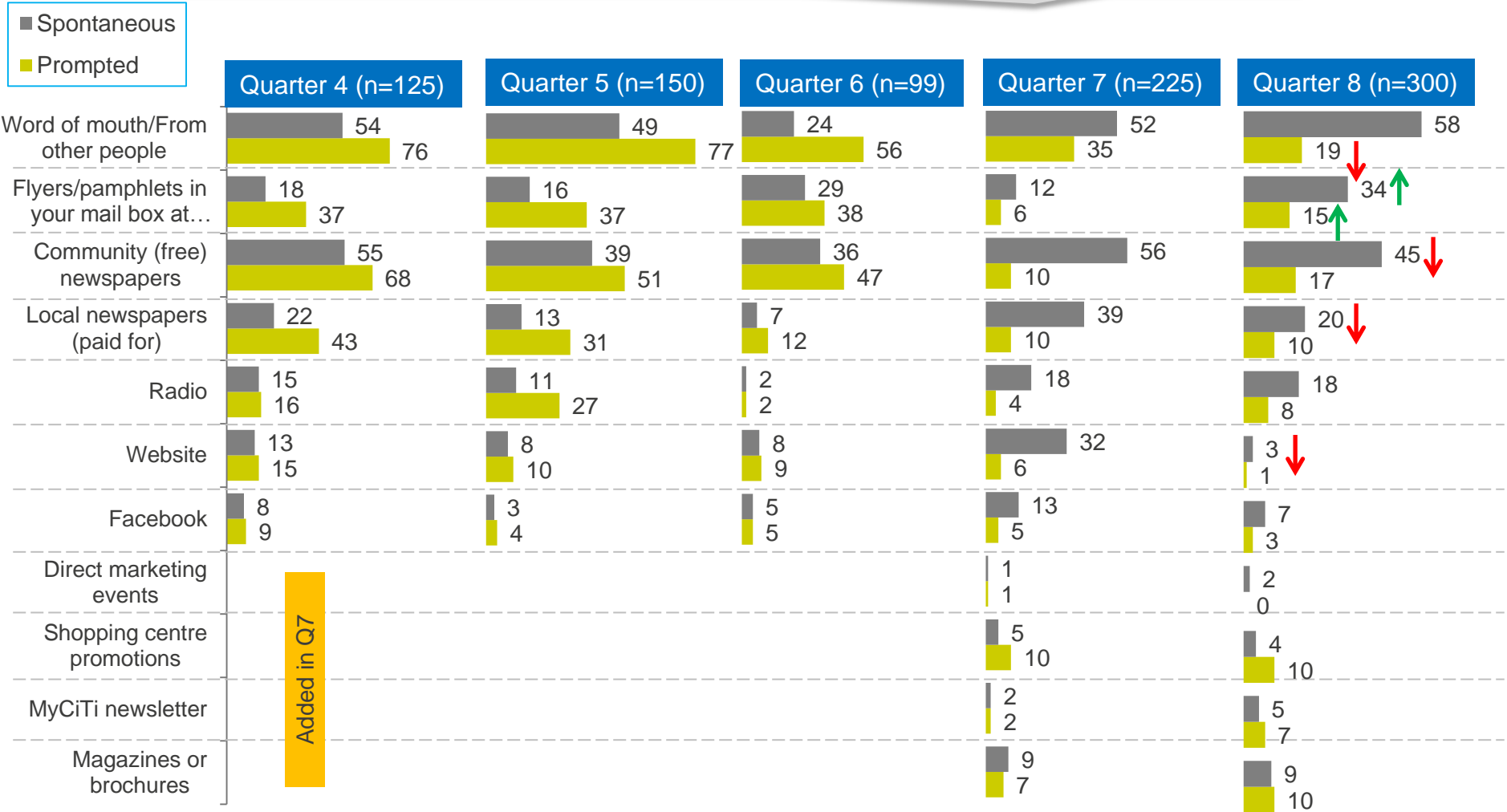


NON-USERS Quarter 8 (n=300) %



User: Creation of MyCiTi awareness

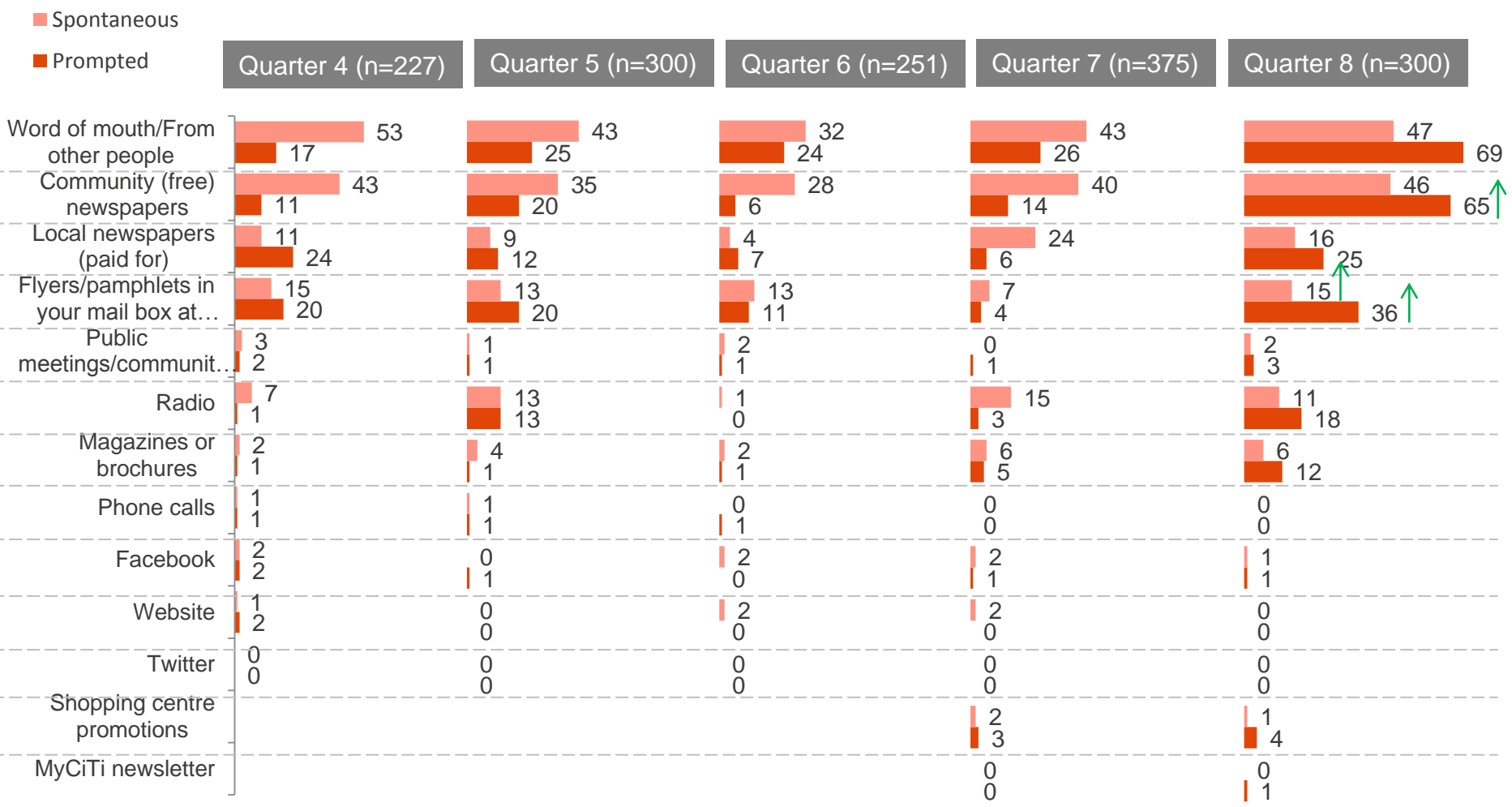
Over the last year, amongst users, we have seen an increase in engagement with flyers and a decrease in the incidence of website. Word of mouth remains strong.



↑ Significant increase from Q6
↓ Significant decrease from Q6

Non-user: Creation of MyCiTi awareness

Amongst non-users of the service, there has been increase in word of mouth, community newspapers and flyers' activity this quarter, along with a stable presence of radio



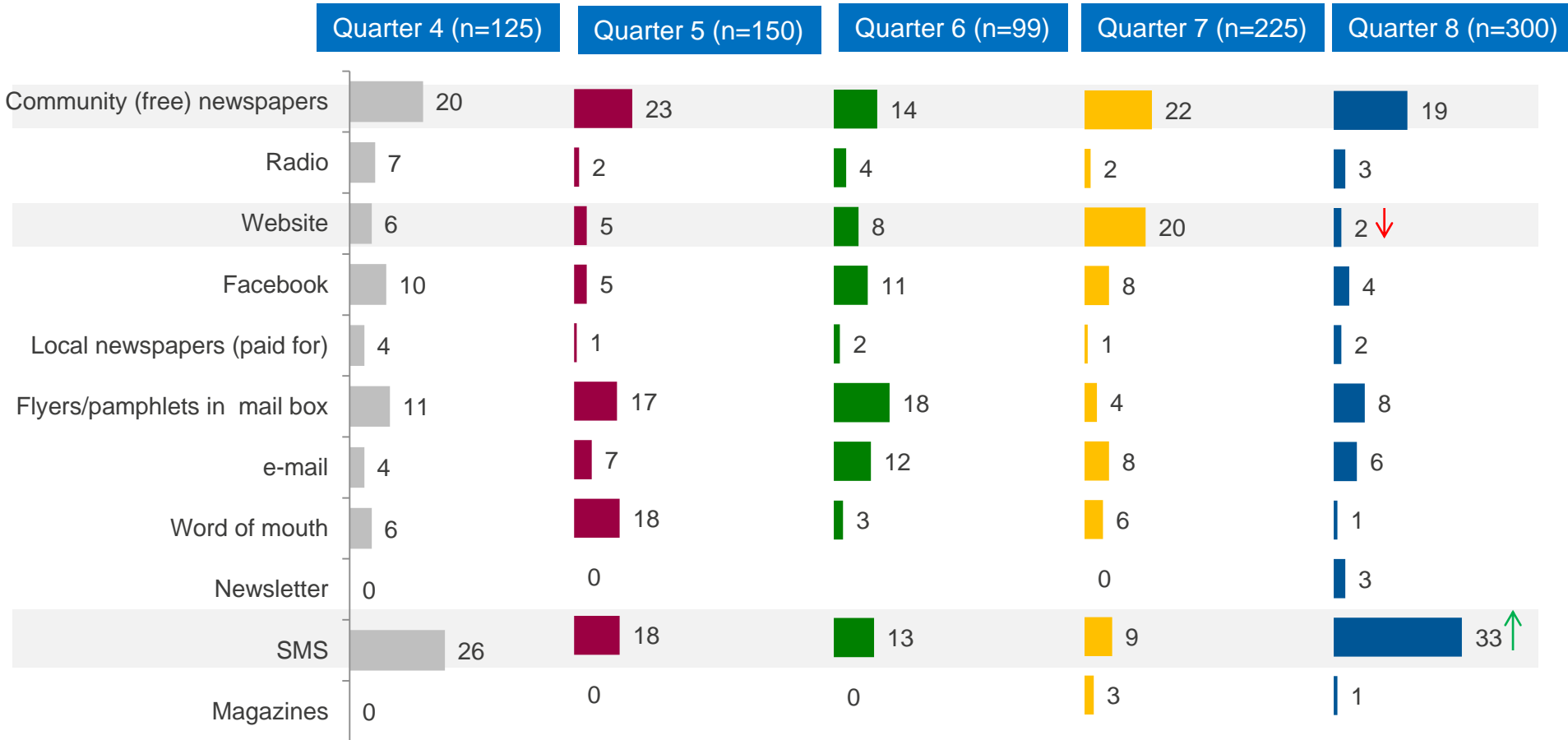
↑ Significant increase from Q6
↓ Significant decrease from Q6



Source: Q16a: Please tell me all the places that you have seen or heard of MyCiTi? Q16b: And please tell me if you have ever heard or seen anything about MyCiTi in any of the following places?

User: Preferred channel for MyCiTi communication

The preferred channels of communication for users are community newspapers and significantly more in this quarter for SMS

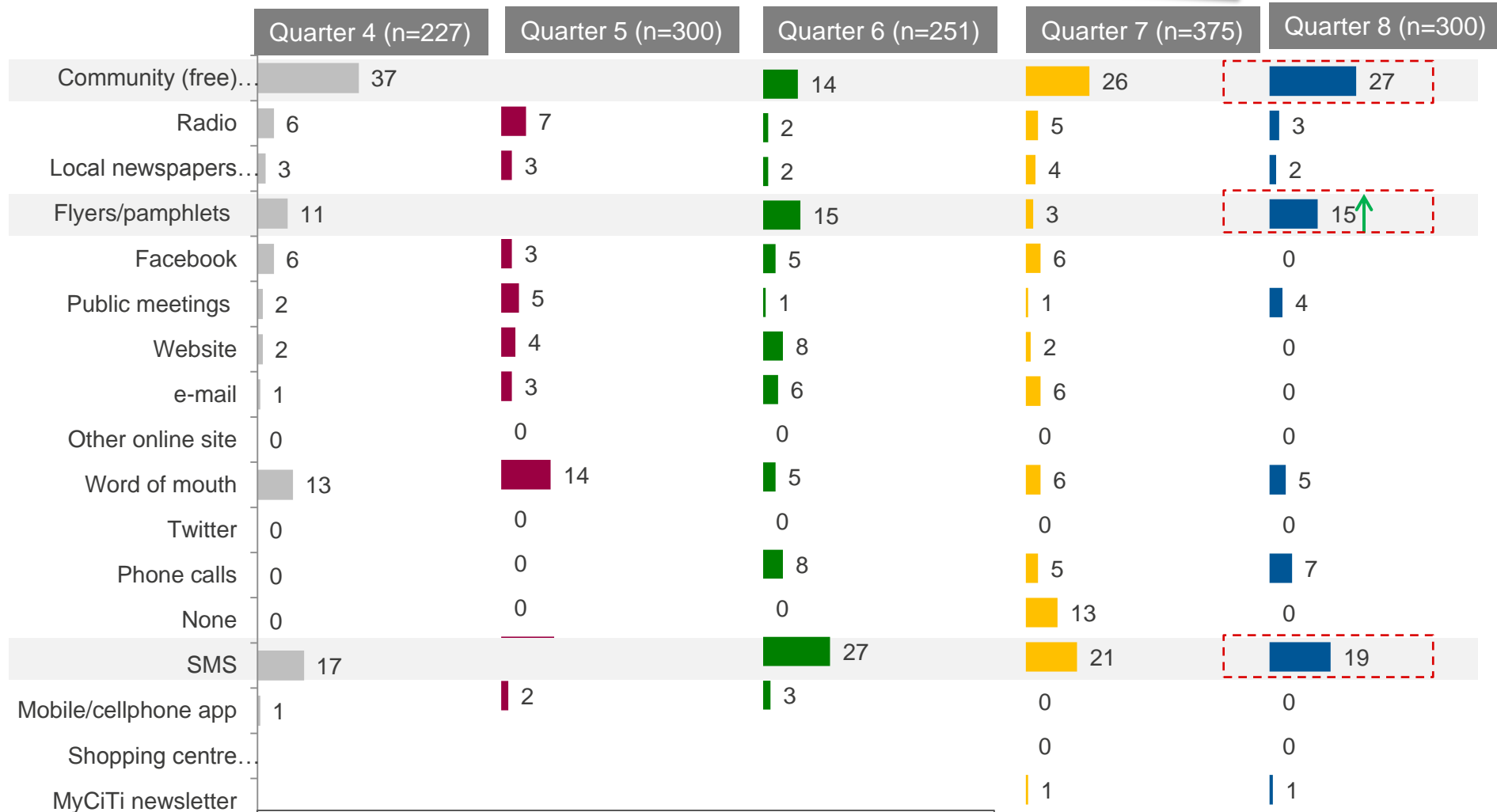


99% of users have a cellphone, of which 73% own a smartphone

↑ Significant increase from Q6
 ↓ Significant decrease from Q6

Non-user: Preferred channel for MyCiTi communication

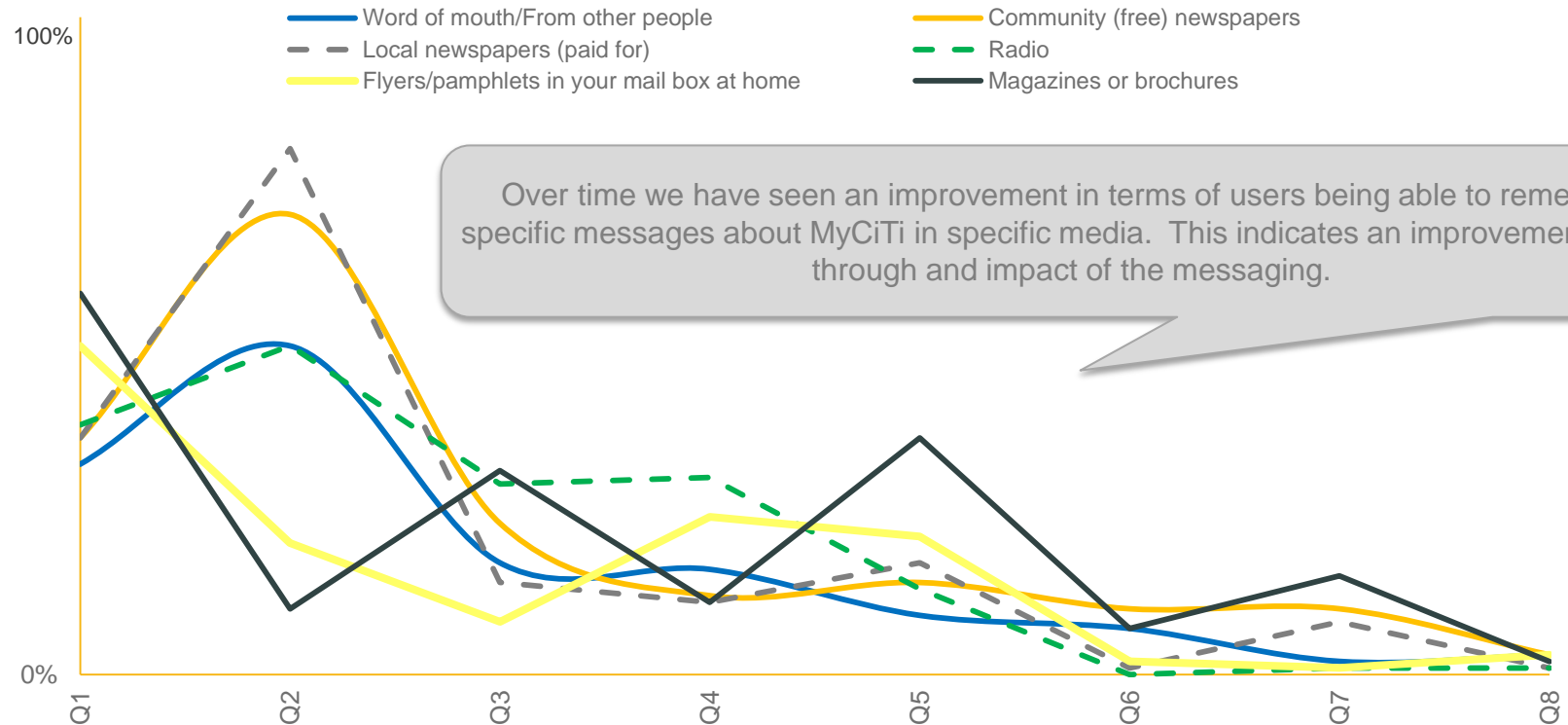
A significant increase in the preferred channel of communication for flyers. Community newspapers and SMS remains preferred tools



96% of non-users have a cell phone, of which 65% own a smartphone

↑ Significant increase from Q6
 ↓ Significant decrease from Q6

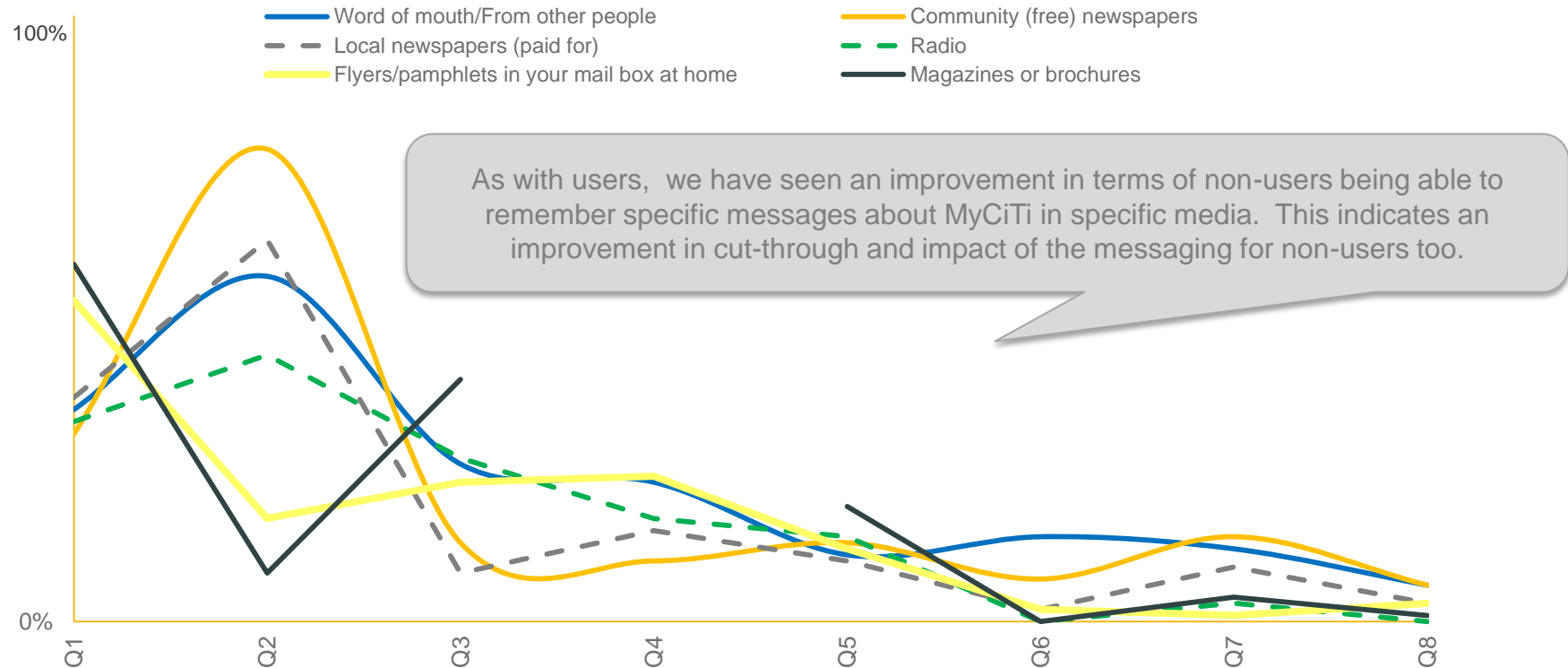
User: Message Recall Over Time - % who DON'T recall the message



Source:Q16c: For each one of these places that you have mentioned, please can you tell me what you remember seeing / hearing / reading about MyCiTi?

*Caution: small sample base. Media types with sample sizes consistently less than n=15 not reflected on slide

Non-User: Message Recall Over Time - % who DON'T recall the message



Source: Q16c: For each one of these places that you have mentioned, please can you tell me what you remember seeing / hearing / reading about MyCiTi?

*Caution: small sample base. Media types with sample sizes consistently less than n=15 not reflected on slide

Key points

What are the key take-outs?

- ✓ Word of mouth remains an important component of awareness of the service which highlights the importance of generating positive word of mouth
- ✓ In terms of formal communication, preferred methods include community newspapers, flyers and SMS
- ✓ There has been an increase in awareness of flyers this quarter, as well as increased awareness of info in community newspapers amongst non-users
- ✓ Recall of messaging remains good with the vast majority remembering the message contained in the media they have seen

How are people reacting to the card payment system? Are there any issues?

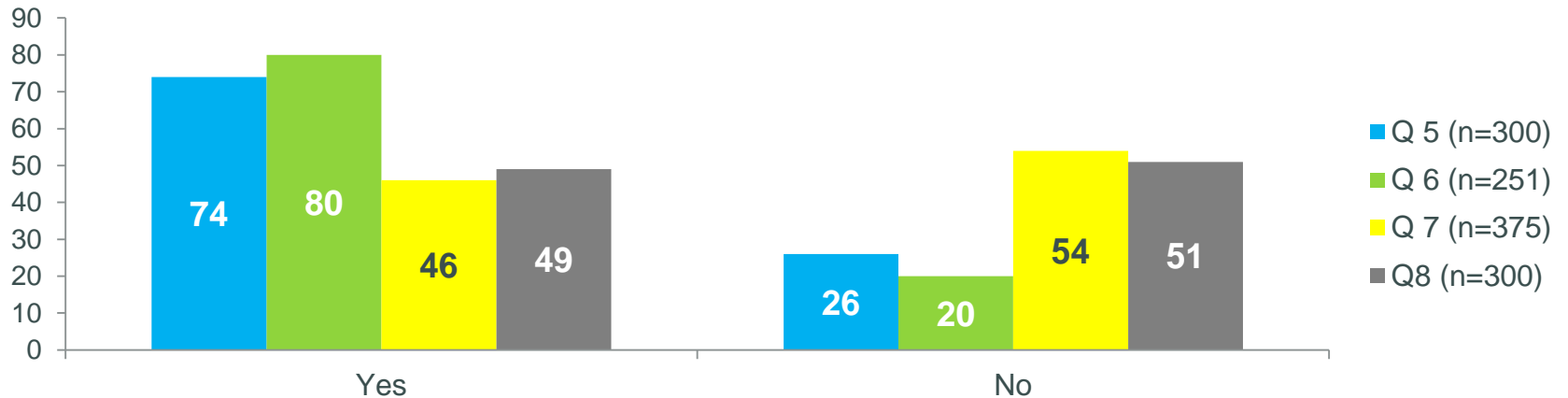
Why do we want to know this?

- ✓ So that we can assess whether further communication is required and whether there are any operational issues

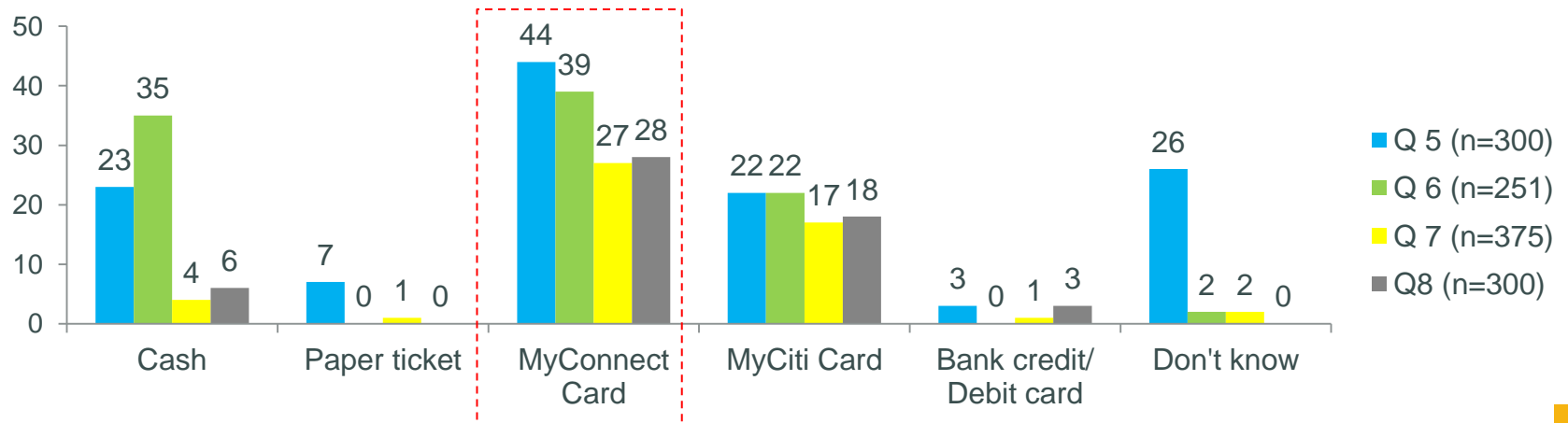
Non-user: Awareness of kind of payment system used on bus and MyCiTi payment methods

About half the respondents claim to know what payment system is used on the MyCiTi buses. Most of those who claim to know mention a card BUT the key issue is the 51% who don't know.

Know payment system on MyCiTi bus



MyCiTi payment methods



Key points

What are the key take-outs?

- ✓ Users feel that the card is easy to use, safe and convenient
- ✓ However, there appears to be an issue with tapping out and the penalties attached to this
- ✓ There is still a lack of awareness amongst non-users about the card system

The latest wave's action points

Action points:

Users

What are the priorities for action?

- ✓ Investigate lower uptake of service as a commuting option in Hout Bay
- ✓ Address issues with on time arrivals and departures
- ✓ Improve ease of travelling with children and people with special needs, particularly in CBD and Du Noon – is this about overcrowding on buses or platform issues?
- ✓ Address remaining issues with driver professionalism in Tableview Feeder routes and Century City
- ✓ Supply more recharge points in Century City
- ✓ Rebuild trust on airport, Melkbosstrand and Century City routes
- ✓ Airport – issues with the service need to be addressed since they appear to be eroding conviction and advocacy
- ✓ Continue media focus on community newspapers and flyers (as well as radio)
- ✓ Consider SMS service rollout
- ✓ Continue with more focused messaging
- ✓ Address issues around tapping out and penalties

Action points:

Non-Users

What are the priorities for action?

- ✓ Improve brand presence and visibility, focusing particularly on Hout Bay, Du Noon, Atlantis and Mitchell's Plain
- ✓ Continue to push messages around affordability and ease of use, particularly on future routes
- ✓ Communication around the card system is also important, particularly in future route areas
- ✓ Continue media focus on community newspapers and flyers (as well as radio)
- ✓ Continue with more focused messaging

yellowwood

Thank You!

