

ASFA SURVEY TO MEASURE CUSTOMER SATISFACTION

ASECAP marketing workshop
April 12th, 2019 – ZAGREB



French tolled motorway network

Key figures

- 9137,9 km
- 18 concessionnaires
- 4 operating companies
- 367 service areas
- 637 rest areas
- 946 interchanges



A TOOL TO BETTER KNOW OUR CUSTOMERS

- ✓ Toll road companies priorities is to satisfy customer needs
- ✓ This survey is carried out on a yearly basis
- ✓ This tool has been set up since 1996 (Since 2006, private companies have been asked by the State to provide indicators, the survey has been adapted accordingly).
- ✓ It is performed in order to check if customer satisfaction is reached and to make sure that action taken by motorway companies match with their expectancies
- ✓ Results issued by ASFA are aggregated figures considered as a reference by motorway companies

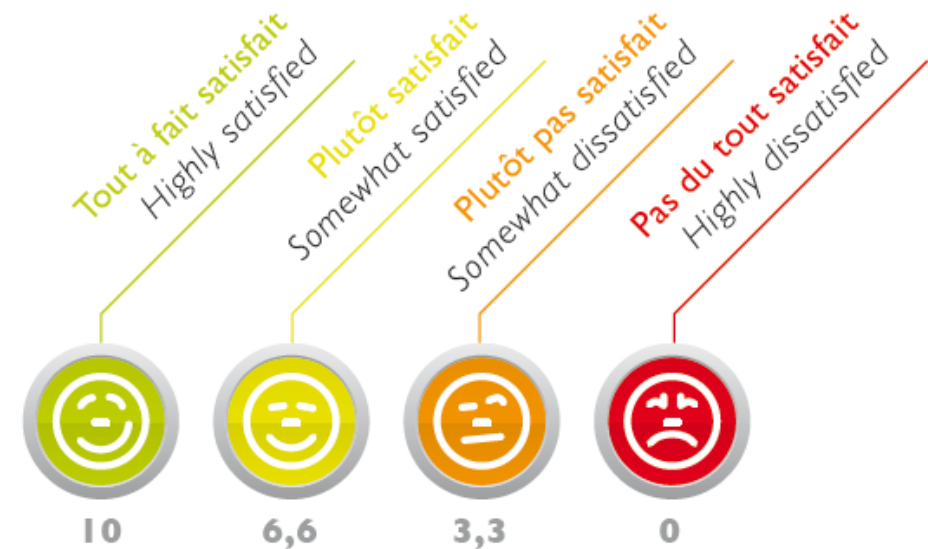
MAIN FEATURES OF THE SURVEY

- ✓ Survey carried out during 3 periods of the year (spring, summer, winter)
- ✓ 9 850 persons interviewed face to face in service areas
- ✓ 87 different areas,
- ✓ with 78 measurements of 125 interviews
 - 80% VL
 - 20% PL
- ✓ Questionnaire is composed with 9 themes listing 40 criteria to collect customer appreciation
- ✓ For the 9 themes, the ratings are above 7/10 (satisfaction level) and 8.4/10 (excellence level)



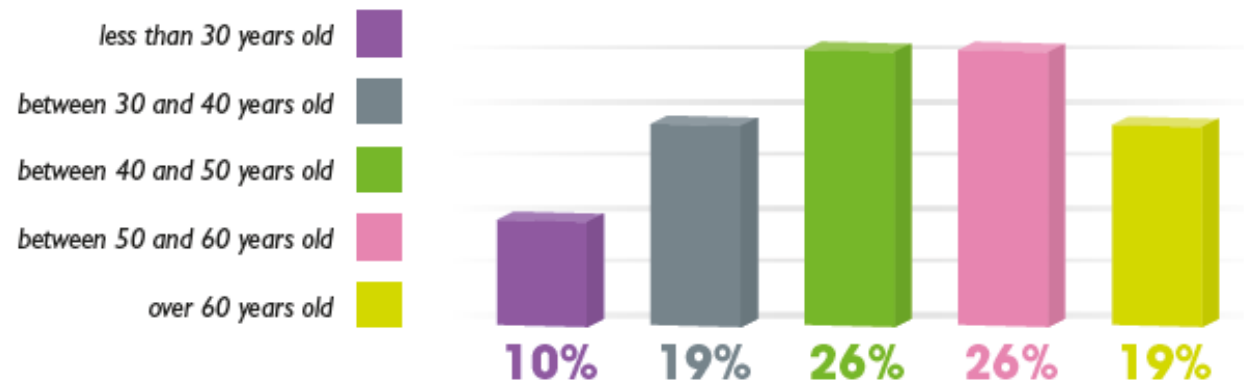
MAIN FEATURES OF THE SURVEY

- ✓ Satisfaction is expressed on a 4-level scale from “highly satisfied” to “highly dissatisfied”, which is then translated into a figure on a scale from 0 to 10.
- ✓ Satisfaction level is reached with ratings above 7.
- ✓ Excellence level with ratings above 8.5.



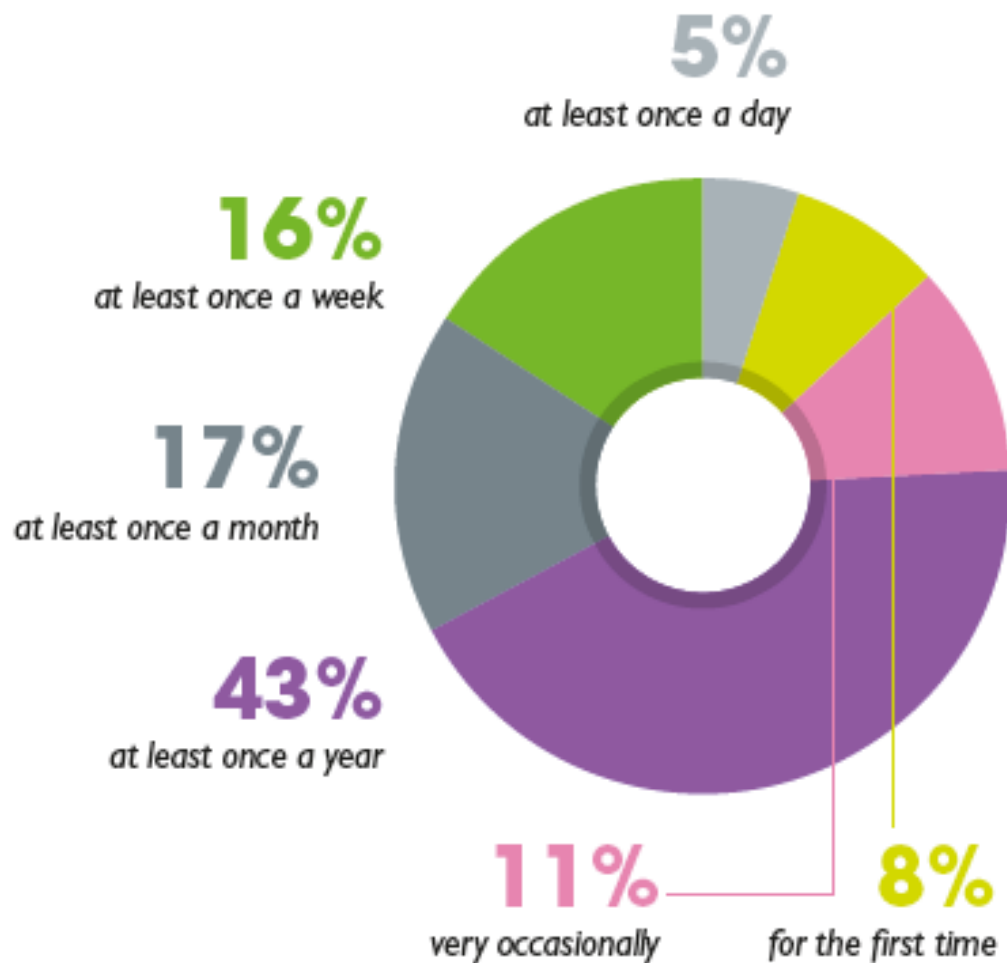
WHO ARE THE SURVEYED CUSTOMERS? HOW MANY KM A YEAR DO THEY COVER? WHEN AND WHY DO THEY USE A MOTORWAY?...

→ **71%** are aged between 30 and 60

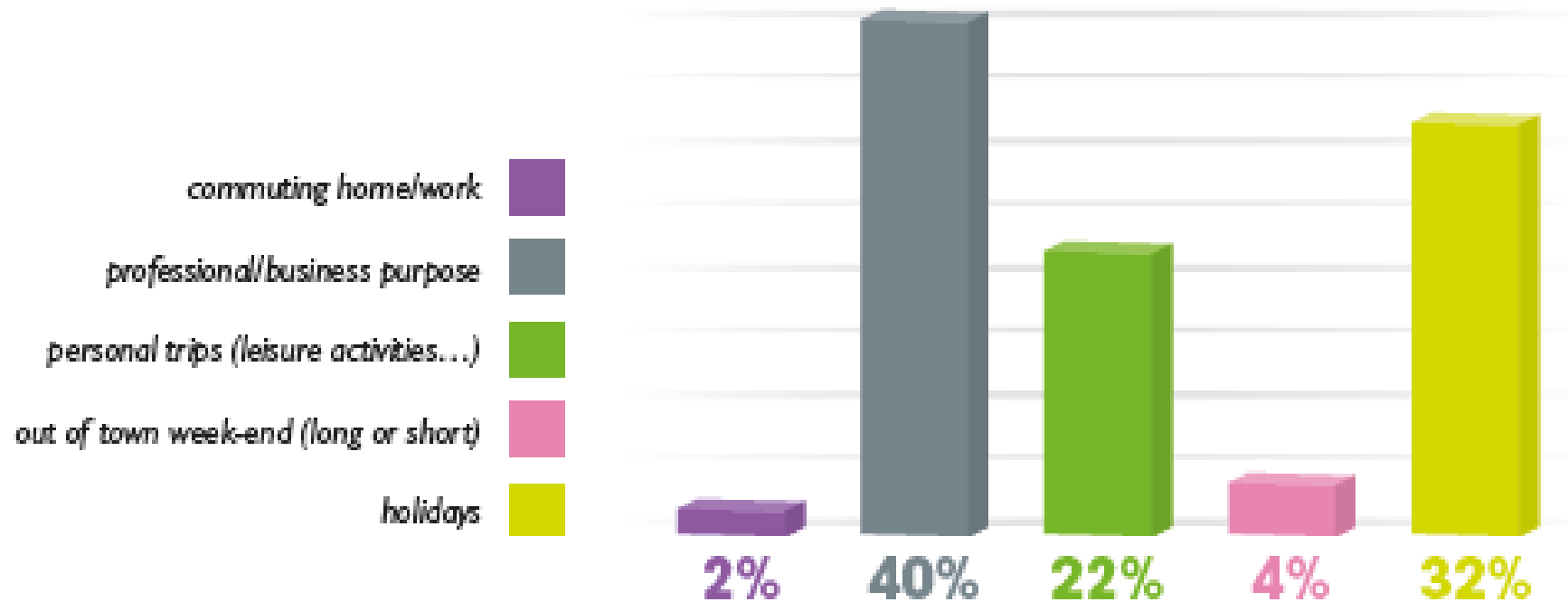


- **62%** cover a distance of less than 400 km
- **77%** are men
- **45%** are employees or workmen, **37%** are CSPs and **18%** are non-working (retired or without any professional activities)
- **80%** drive a light vehicle

81% ARE MOTORWAY REGULAR USERS



42% USE THEIR CAR FOR PROFESSIONAL REASONS



PROGRESSION OF THE REGISTERS' AND OVERALL SATISFACTION'S GRADES

REGISTERS	2017	2018	2018 %
OVERALL SATISFACTION	7,9	8,0	95
MOTORWAY SERVICE & RESTING AREAS SAFETY	8,6	8,8	97
TOLL PLAZA OVERALL EXPERIENCES (road signage, waiting time, reception)	8,6	8,6	97
SERVICE AREAS INFRASTRUCTURES(parking lots, cleanliness, relaxation equipment, public conveniences, phones, lighting)	8,4	8,5	98
THE STATE OF THE MOTORWAY (surface quality, road marking, road & verge cleanliness)	8,5	8,4	98
SERVICES (petrol stations, shops, restaurants, cafeterias, sanitary & showers, tyre inflation points)	8,2	8,4	96
ROAD SAFETY (road construction safety, area frequency, emergency phones, safety & weather reports)	8,0	8,1	98
TRAFFIC CONDITIONS (fluidity, traffic in construction areas, cohabitation with other vehicles)	8,0	8,1	96
SIGNAGE & INFORMATION (directional signage, VMS & 107. 7 FM informations, services info, breakdown service information...)	7,9	8,0	98
MOTORWAY AESTHETICS (landscape integration, works' aesthetics, aspect of nearby approaches)			

95 % OF THE CUSTOMERS ARE SATISFIED

Overall satisfaction

8,0_{/10}

THANK YOU FOR YOUR ATTENTION

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