

The use of social media within the public transport industry in Switzerland

Results of an online survey conducted in Switzerland

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1. Abstract

- **Facebook & YouTube** appear to be the most adopted social media platforms among public transport enterprises in Switzerland with 80% respectively 84%.
- 53% of interviewees mentioned using **Facebook** on a weekly base while 20% say to post at least once per day.
- **Youtube** seems to be less frequently used, as 59.1% of surveyed organisations upload videos on a monthly base and 22.7% even on a weekly base.
- **Twitter & Instagram** have an adoption rate of 47.7% and 55.6%. They are both mostly used on a weekly base. However, Twitter reaches the highest frequency score, as 13.6% interviewed organisations admit to tweet everyday.
- **Goals** pursued by public transport companies in Switzerland appear to be mainly related to commercial ambitions and customer service.
- In regard to **financial investment**, we notice that digital marketing and social media activity are not necessarily connected. As a matter of fact, expenditures in digital areas seem to be well accepted among the surveyed participants. However, social media investments remain very limited, as 70.2% of respondents answered that they allocate less than 2.5% of their overall marketing budget. These results suggest that social media is still not well integrated within the digital marketing mix.

1. Zusammenfassung

- **Facebook & YouTube** scheinen mit 80% bzw. 84% die meistgenutzten Social Media Plattformen unter den Verkehrsbetrieben in der Schweiz zu sein.
 - 53% der Befragten gaben an, **Facebook** wöchentlich zu nutzen, während 20% sagen, dass sie mindestens einmal pro Tag posten.
 - **Youtube** scheint weniger häufig genutzt zu werden, da 59,1% der befragten Organisationen Videos monatlich und 22,7% sogar wöchentlich hochladen.
 - **Twitter & Instagram** haben eine Adoptionsrate von 47,7% und 55,6%. Beide werden meist wöchentlich verwendet. Twitter erreicht jedoch die höchste Frequenzbewertung, da 13,6% der befragten Organisationen zugeben, dass sie jeden Tag twittern.
- Die **Ziele** der Verkehrsbetriebe in der Schweiz scheinen sich hauptsächlich auf kommerzielle Ambitionen und Kundenbetreuung zu beziehen.
 - Im Hinblick auf die **finanziellen Investitionen** stellen wir fest, dass digitales Marketing und Social Media Aktivitäten nicht zwangsläufig miteinander verbunden sind. Tatsächlich scheinen die Ausgaben im digitalen Bereich bei den befragten Teilnehmern gut angenommen zu werden. Allerdings sind die Investitionen in Social Media nach wie vor sehr begrenzt, da 70,2 % der Befragten antworteten, dass sie weniger als 2,5 % ihres gesamten Marketingbudgets aufwenden. Diese Ergebnisse deuten darauf hin, dass Social Media noch immer nicht gut in den digitalen Marketing-Mix integriert ist.

1. Résumé

- **Facebook et YouTube** semblent être les plateformes de médias sociaux les plus utilisées par les entreprises de transport public en Suisse avec respectivement 80% et 84%.
- 53 % des personnes interrogées ont mentionné utiliser **Facebook** sur une base hebdomadaire, tandis que 20 % disent qu'il faut poster au moins une fois par jour.
- **Youtube** semble être moins utilisé, puisque 59,1% des organisations interrogées uploadent des vidéos sur une base mensuelle et 22,7% sur une base hebdomadaire.
- **Twitter & Instagram** a un taux d'adoption de 47,7% et 55,6%. Ils sont tous les deux principalement utilisés sur une base hebdomadaire. Toutefois, Twitter atteint le score de fréquence le plus élevé, puisque 13,6% des organisations interrogées admettent de tweeter chaque jour.
- Les **objectifs poursuivis** par les entreprises de transport public en Suisse semblent principalement liés aux ambitions commerciales et au service à la clientèle.
- En ce qui concerne **l'investissement financier**, on remarque que le marketing numérique et l'activité des médias sociaux ne sont pas nécessairement liés. En fait, les dépenses dans les domaines numériques semblent bien acceptées par les participants au sondage. Toutefois, les investissements dans les médias sociaux restent très limités puisque 70,2 % des répondants ont répondu qu'ils consacrent moins de 2,5 % de leur budget global de marketing. Ces résultats suggèrent que les médias sociaux ne sont pas encore bien intégrés dans le mix marketing numérique.

2. Methodology

- The survey has been conducted among public transport enterprises throughout Switzerland in order to **understand the usage and the maturity of social media usage**. The **online questionnaire** (see appendix for details) aimed any company providing land transportation services. It has been decided to exclude air transport from this research as this industry has a very different structure due to higher competition.
- The list of organisations was generously provided by the Association of Public Transport (VöV / UTP). We contacted 141 companies by email in September 2017 and got answers from 47 entities corresponding to a **response rate** of 33.3%.

Sample characteristics

- The analyzed sample is composed of 14 organizations counting less than 100 employees, 17 have between 100 and 500 employees, seven companies manage between 500 and 3000 employees and four of the respondents have more than 3000 employees (five respondents did not provide this information).
- Nearly every second company surveyed operates at national level (44.7%). Buses are the most common means of transport among respondents (51.1%), followed by trains (38.3%).

3. Social media goals

- As it appears, the majority of companies in Switzerland target two categories of **objectives**.
 - The first includes the overall branding as we observe that “**brand recognition**” reaches the highest score (75.6%) and “**improving company’s reputation**” still concerns 51.2% of respondents.
 - The second group is centered around the **customer experience**, as agencies seem eager to **engage with their passengers** (70.7%) and create **new ways to serve** them (58.8%).
- Only 26.8% of companies try to increase website traffic through their social media activity. It can also be highlighted that this specific target interests almost exclusively (80% of collected answers) transport providers having an annual turnover superior to 200 million CHF per year.

Rank	Goal / use	n	%
1	Brand recognition (i.e. Reaching new markets)	31	75.6%
2	Customer engagement (increase conversation with riders)	29	70.7%
3	Additional customer service channel	24	58.8%
4	Improving company's reputation	21	51.2%
5	Conversion (transforming online visitors to real riders)	12	29.2%
6	Generating website traffic	11	26.8%
7	Knowing better existing customers	11	26.8%
8	Others	3	7.3%
Answering rate		41/47	87.2%

4. Social media use

- Nearly **three out of four respondents post content on Facebook daily or at least once a week**, it is the highest intensity among platforms. We can also identify that **84.1% of respondents have a Youtube account**. Even though, the usage intensity is much lower on Youtube than on Facebook. This can be explained by the significant higher costs of video content production. Twitter is the 3rd most used platform and 13.6% of respondents say that they tweet on a daily base.
- Companies with high turnover (more than CHF 200 mio CHF) use a larger range of social media platforms (they are clearly overrepresented on YouTube and Twitter).

	Never	Monthly	Weekly	Daily	Adoption rate
Facebook	20%	6.7%	53.3%	20%	80%
Instagram	44.4%	17.8%	33.3%	4.4%	55.6%
Twitter	52.3%	9.1%	25%	13.6%	47.7%
Youtube	15.9%	59.1%	22.7%	2.3%	84.1%

Size (annual turnover in mio CHF)	Small (>50)	Medium (50 to 200)	Large (<200)	Average
Facebook	3.18	3.44	4.17	3.42
Instagram	2.2	2.33	2.83	2.28
Twitter	1.9	2.00	4.60	2.29
YouTube	1.9	2.56	3.33	2.31
Average	2.3	2.6	3.74	2.6

Scale of frequency: 1 = never; 2 = monthly; 3 = weekly; 4= several times a week; 5 = daily

5. Social media content strategy

Topics of content

	Never	Monthly	Weekly	Daily	Adoption rate
Real-time alerts	24.4%	34.1%	29.30%	12.2%	75.6%
Information related to company	22.5%	45%	30%	2.5%	77.5%
Promotional content	7.3%	26.8%	63.4%	2.5%	92.7%
New projects presentation	12.2%	46.34%	41.46%	0%	87.8%
Sharing partners content	17%	48.8%	34.2%	0%	83%
Green boxes concern over-represented topics of content per frequency of use					

Diffusion of “**promotional content**”, as one option in a brand recognition strategy, is adopted by a large majority of organisations (92.7%) and is frequently used (63.4% weekly posting). “**Real-time alerts**” are rather popular among the respondents with 12.2% of companies posting alerts on a daily basis and 29.3% on a weekly basis.

5. Social media content strategy

Forms of content

	Never	Monthly	Weekly	Daily	Adoption rate
Videos	19.5%	61%	19.5%	0%	80.5%
Pictures	7.3%	19.5%	65.9%	7.3%	92.7%
Live Streaming	78%	14.6%	7.3%	0%	22%
External links	24.4%	34.1%	41.4%	0%	75.6%
Pure text	35.7%	38.1%	21.4%	4.8%	64.3%

Green boxes concern over-represented form of content per frequency of use

According to the survey results, **pictures** are in general the most common form of content used on social media (92.7% adoption rate). Three quarters of respondents post photos at least once a week. Meanwhile, **videos** are very well adopted with 80.5% of respondents sharing them on social media, but only once a month. We can notice that live streaming is still largely unknown content form by transport companies in Switzerland.

5. Social media content strategy

Forms of content by annual turnover of companies

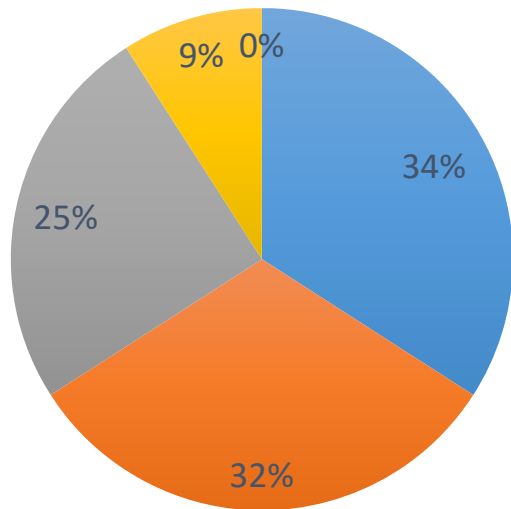
Size (annual turnover in mio CHF)	Small (>50)	Medium (50 to 200)	Large (<200)
Videos	1.72	2.11	3.00
Pictures	2.87	3.11	4.17
Live streaming	1.2	1.22	1.83
External links	2.2	2.22	2
Pure text	2.23	1.89	2
Scale of frequency: 1 = never; 2 = monthly; 3 = weekly; 4= several times a week; 5 = daily			

The survey shows a clear link between the content posted on the social media platforms and the size of the organisation (in terms of turnover). This statement is even clearer when we take a closer look to the categories “pictures” and “videos” that are used at a significantly higher frequency by the larger companies.

6. Marketing budgeta

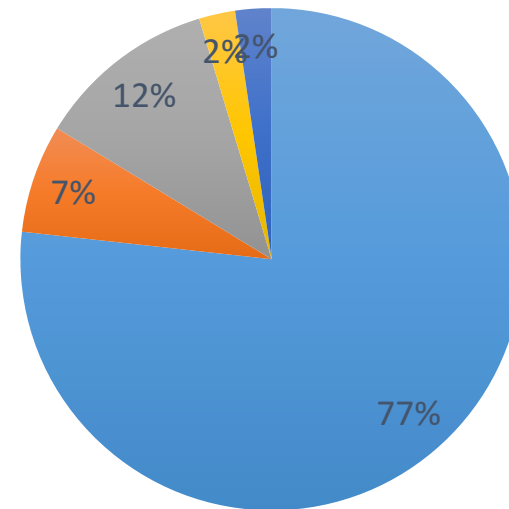
What budgets do you allocate to digital and social media marketing (approximate percentage of total marketing budget)?

Digital Marketing



■ < 5% ■ 5 - 9% ■ 10 - 14% ■ 15 - 20% ■ > 20%

Social Media Marketing

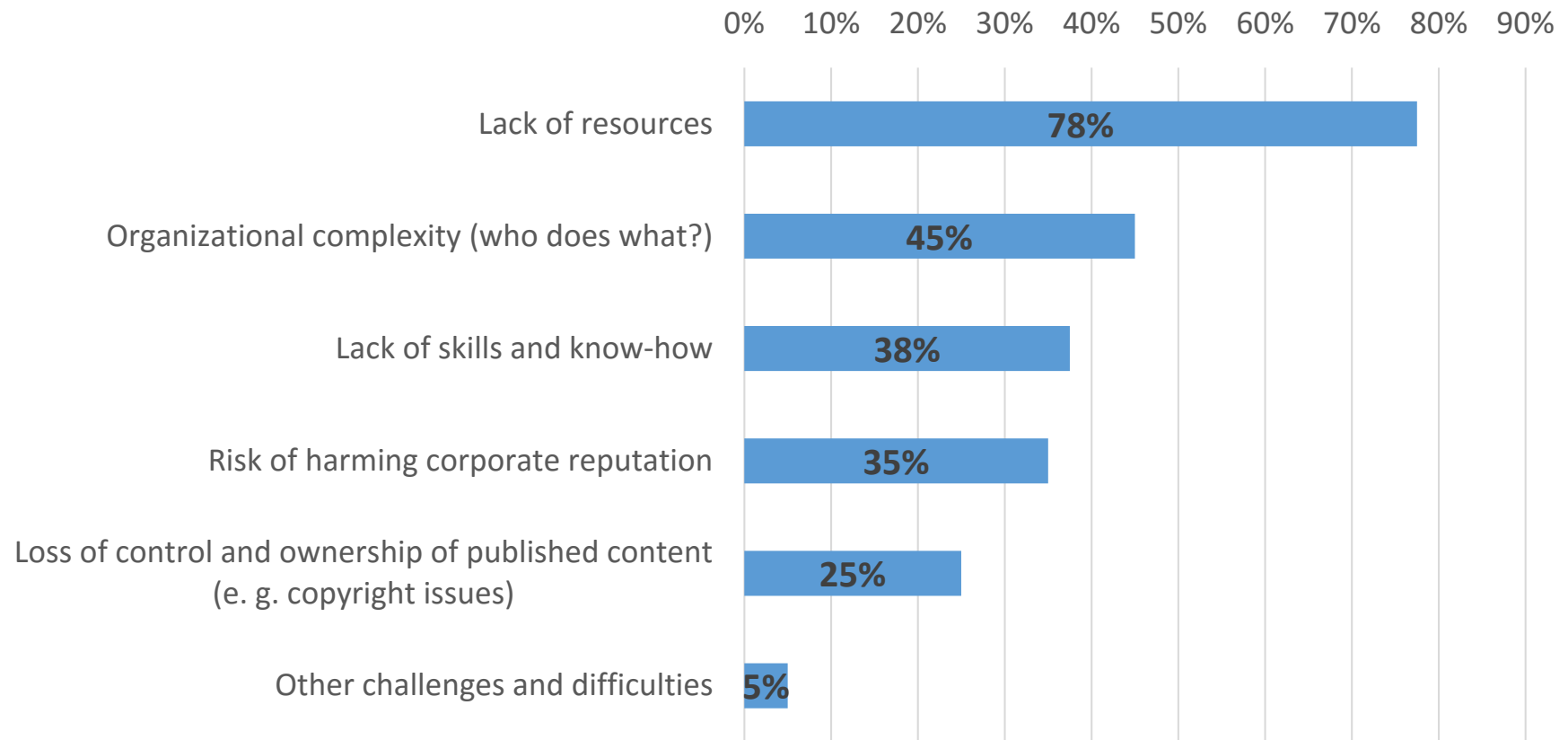


■ < 2.5% ■ 2.5 - 4.9% ■ 5 - 7.4% ■ 7.5 - 10% ■ > 10%

84% of respondents spend less than 5% of the marketing budget for social media, while 34% of companies spend more than 10% of the marketing budget on digital marketing.

7. Challenges

Difficulties/challenges in the use of social media in transport companies



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9. Appendix: The Questionnaire (page 1)

Digital & social media strategy

How much budget do you allocate to digital marketing (approximate percentage to overall marketing budget)?

- < 5 % (very low)
- 5 - 9% (low)
- 10 - 14% (medium)
- 15 - 20% (high)
- > 20% (very high)

How much budget do you allocate to social media (approximate percentage to overall marketing budget)

- < 2.5%
- 2.5 - 4.9%
- 5 - 7.4%
- 7.5 - 10%
- > 10%

What do you expect when using social media (goals & ROI)?

- Engagement (increasing of interactions, dialogues, participation with passengers and online community)
- Conversion (e.g. transformation of online users into real visitors)
- Reach and awareness/visibility (e.g. promoting the company, reaching of new target groups, raising brand profile)
- Generation of web-site traffic
- Gain customer insight
- Usage as a service or feedback channel
- Increase of knowledge leadership/reputation
- Other goals

If "other goals", please mention which ones

9. Appendix: The Questionnaire (page 2)

Social media use

How active is your company on the following social media platforms? (times per year)

	never	rarely (1 - 5)	sometimes (6 - 10)	often (11 - 15)	very often (> 15)
Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instagram	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Youtube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Linkedin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snapchat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pinterest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Blogs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social Bookmarking (ie: Reddit)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Google+	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you use other social media platforms, please mention which ones

9. Appendix: The Questionnaire (page 3)

How often do you post the following content on social media platforms? (times per year)

	never	rarely (1 - 5)	sometimes (6 - 10)	often (11 - 15)	very often (> 15)
Real time trouble on transport lines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Company related information (figures, interviews of employees, press articles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promotional content (special offers, teasers, general advertising)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Presentation of new projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sharing partner posts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you share other contents, please mention which one:

How often do you post the following type of content on social media platforms? (times per month)

	never	rarely (< 1)	sometimes (2 - 5)	often (6 - 10)	very often (> 10)
Video	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pictures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Live streaming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
External links	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pure text	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. Appendix: The Questionnaire (page 4)

Which of the following difficulties do you observe regarding the use of social media ?

- Possible damage of reputation
- Losing control over content and pictures (e.g. copyright issues)
- Heavier administration and organisation (who does what?)
- Lack of resources
- Lack of competence / know-how
- Other difficulties

If "other difficulties", please mention which ones

9. Appendix: The Questionnaire (page 5)

General information

What is your operational turnover per year? (in Mio CHF)

- | | |
|-------------------------------|---------------------------------|
| <input type="radio"/> < 50 | <input type="radio"/> 20 - 50 |
| <input type="radio"/> 1 - 5 | <input type="radio"/> 50 - 100 |
| <input type="radio"/> 5 - 10 | <input type="radio"/> 100 - 200 |
| <input type="radio"/> 10 - 20 | <input type="radio"/> > 200 |

How many staff member do you count in your company?

- | | |
|----------------------------------|-----------------------------------|
| <input type="radio"/> < 50 | <input type="radio"/> 1000 - 2000 |
| <input type="radio"/> 50 - 100 | <input type="radio"/> 2000 - 3000 |
| <input type="radio"/> 100 - 500 | <input type="radio"/> > 3000 |
| <input type="radio"/> 500 - 1000 | |

How many travelers do you transport per year, rail and road combined? (in mio, rounded to superior)

- | | |
|-------------------------------|--------------------------------|
| <input type="radio"/> < 0.5 | <input type="radio"/> 5 - 49 |
| <input type="radio"/> 0.5 - 1 | <input type="radio"/> 55 - 100 |
| <input type="radio"/> 1 - 5 | <input type="radio"/> > 100 |

If you would like to receive the results of this research, please type your email address.