

Attachment 1 to Report 16.368

2015/16 PUBLIC TRANSPORT PASSENGER SATISFACTION SURVEY



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Executive Summary

1. Introduction and Method

The New Zealand Transport Agency (NZTA) requires that surveys of user perceptions of public transport are carried out as part of monitoring requirements. Greater Wellington Regional Council commissioned Gravitas Research and Strategy to conduct its 2015/16 public transport customer satisfaction survey. In line with NZTA guidelines, Gravitas conducted an on-board survey with bus, train and ferry passengers, using a self-completion methodology.

In accordance with NZTA guidelines, a random sampling technique was used to select the trips to be surveyed. In total n=206 public transport trips were surveyed on, generating n=2,362 completed questionnaires. Summary Table 1 shows the number of trips and the number of completed questionnaires received by mode.

Summary Table 1: Sample Sizes by Mode

	Number of Trips				Number of Completed Questionnaires			
	Total	Bus	Train	Ferry	Total	Bus	Train	Ferry
Total	206	102	90	14	2362	647	1583	132
Maximum margin of error <i>(at 95% confidence interval)</i>					± 2.0%	± 3.9%	± 2.5%	± 8.5%

The questionnaire content was based on the list of common questions designed by NZTA. This year additional questions were added to understand sources of public transport information currently used, and to measure passenger satisfaction with public transport information. Comprehensive pilot-testing of the questionnaire and survey process was undertaken prior to live fieldwork commencing.

Surveying was conducted between the 3rd and the 29th of May 2016¹. Questionnaires were distributed to every second passenger aged 15 years or older on randomly-selected services. The response rate was 59%² for all services combined.

This year, the ‘total’ (all mode) survey results presented in the report have been weighted to reflect actual May 2016 patronage by mode – so results for ‘bus’ comprise 65% of the total (all mode) sample, train 34% and ferry 1%. Note that results by mode (and operator) are based on unweighted data.

¹ Note that this is slightly later than in 2015 (21st of April and 10th of May) due to the timing of the school holidays.

² 76% among ferry passengers, 59% for train passengers and 57% among bus passengers.

Note: The summary report submitted to NZTA to meet national annual monitoring requirements provides results by mode only (no ‘all mode’ results are reported). Consequently, unweighted data was used for the summary report.

2. Passengers’ Overall Perceptions of Wellington’s Public Transport Services

1. Overall Satisfaction with Current Trip

The majority of Wellington public transport users continue to be satisfied with their trip overall, 93% giving a rating between 6 and 10 (satisfied to some extent), including 19% of users who were *extremely satisfied* (giving a rating of 10 out of 10). These results are significantly higher than those reported last year (89% satisfied in 2015). Only 2% gave a rating between 0 and 4 (dissatisfied to some extent), a significant decline from 5% last year. By mode of transport, significant increases in perceptions of the trip overall were evident for both bus (up from 89% to 94%) and train (89% to 93%) passengers. Levels of satisfaction have returned to those recorded in 2014.

Summary Table 2: Satisfaction with Current Trip Overall – By Mode (%)

	Total			Bus			Train			Ferry		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
Rating	(n=4,117)	(n=4,247)	(n=2261)	(n=1,293)	(n=1,324)	(n=614)	(n=2,676)	(n=2,773)	(n=1,537)	(n=148)	(n=150)	(n=128)
Dissatisfied (0-4)	3	5	2	3	4	1	3	5	2 (↑B)	1	1	1
Neutral (5)	5	6	5	5	7	5	5	6	5	2	5	2
Satisfied (6-10)	92	89	93	92	89	94	92	89	93	97 (↑BT)	94	97

Base: All respondents who answered this question, excluding ‘Not applicable’ responses.

Orange text indicates a result that is statistically significantly different (higher or lower) than the previous year.

Letter notation denotes mode(s) that this result is significantly higher than in the current survey wave; B=Bus, T=Train, F=Ferry.

All six operators have received high overall satisfaction ratings this year. East by West Ferries (97%) and Newlands Coach Service (98%) continue to perform most positively for the trip overall. Over the last 12 months, overall satisfaction for all six operators has improved.

2. Overall Satisfaction with Stop/Station/Wharf

Almost all public transport users are satisfied to some extent with the stop, station or wharf where they started their trip, 93% giving a positive rating (between 6 and 10), including 19% of respondents giving a rating of 10 out of 10. Only 3% of respondents are dissatisfied with the stop, station or wharf. Ratings are similar by mode, 92% of ferry passengers, 93% of bus passengers and 94% of those travelling by train satisfied to some extent with the stop/station/wharf where they commenced their trip. Results for bus and train have improved significantly from last year.

Summary Table 3: Overall Satisfaction with Stop/Station/Wharf – By Mode (%)

	Total			Bus			Train			Ferry		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
Rating	(n=4,190)	(n=4,328)	(n=2,313)	(n=1,306)	(n=1,339)	(n=631)	(n=2,736)	(n=2,833)	(n=1,559)	(n=148)	(n=156)	(n=128)
Dissatisfied (0-4)	4	4	3	4	5	3	4	4	2	2	4	2
Neutral (5)	5	6	4	6	6	4	5	6	4	5	3	6
Satisfied (6-10)	91	90	93	90	89	93	91	90	94	93	93	92

Base: All respondents who answered this question, excluding 'Not applicable' responses.

Orange text indicates a result that is statistically significantly different (higher or lower) than the previous year.

Letter notation denotes mode(s) that this result is significantly higher than in the survey wave; B=Bus, T=Train, F=Ferry.

3. Overall Satisfaction with Wellington Region's Public Transport System

Wellington's public transport users are generally satisfied with the region's public transport system, with 88% expressing some degree of satisfaction (that is, giving a rating of between 6 and 10), including 12% who are *extremely satisfied*. Satisfaction with the region's public transport system has increased significantly since last year (83%). In contrast, 6% of public transport users are dissatisfied with the region's public transport system, a significantly lower result when compared with last year (8%). Levels of satisfaction are similar by mode of transport.

Summary Table 4: Overall Satisfaction with Wellington Region’s Public Transport System – By Mode (%)

Rating	Total			Bus			Train			Ferry		
	2014 (n=4,189)	2015 (n=4,324)	2016 (n=2,292)	2014 (n=1,302)	2015 (n=1,351)	2016 (n=623)	2014 (n=2,739)	2015 (n=2,827)	2016 (n=1,558)	2014 (n=148)	2015 (n=146)	2016 (n=116)
Dissatisfied (0-4)	8	8	6	7	7	6	9 (↑B)	8	5	9	7	9
Neutral (5)	9	9	6	10	8	6	8	10	7	9	8	4
Satisfied (6-10)	83	83	88	83	85	88	83	82	88	82	85	87

Base: All respondents who answered this question, excluding ‘Not applicable’ responses.

Orange text indicates a result that is statistically significantly different (higher or lower) than the previous year.

Letter notation denotes mode(s) that this result is significantly higher than in the survey wave; B=Bus, T=Train, F=Ferry.

4. Likelihood of Recommending Public Transport in Wellington to Others

Satisfaction with public transport services in the Wellington region is further evidenced by the fact that 89% of respondents would recommend using public transport to a friend or colleague (up significantly from 86% last year). The overall likelihood to recommend includes 24% who are *extremely likely* to recommend. Only 5% of respondents would not endorse Wellington’s public transport services to others. The extent of recommendation is high for all three modes, with the train service receiving a significantly higher recommendation endorsement than last year (up from 86% to 91%).

Summary Table 5: Likelihood of Recommending Public Transport to Others – By Mode (%)

Rating	Total			Bus			Train			Ferry		
	2014 (n=3,762)	2015 (n=4,246)	2016 (n=2,277)	2014 (n=1,206)	2015 (n=1,309)	2016 (n=622)	2014 (n=2,417)	2015 (n=2,787)	2016 (n=1,533)	2014 (n=139)	2015 (n=150)	2016 (n=122)
Unlikely (0-4)	8	6	5	8	6	5	7	7	4	6	3	5
Neutral (5)	7	8	6	9	8	6	7	7	5	4	7	7
Likely (6-10)	85	86	89	83	86	89	86 (↑B)	86	91	90 (↑B)	90	88

Base: All respondents who answered this question, excluding ‘Not applicable’ responses.

Orange text indicates a result that is statistically significantly different (higher or lower) than the previous year.

Letter notation denotes mode(s) that this result is significantly higher than in the survey wave; B=Bus, T=Train, F=Ferry.

Among Wellington operators, those travelling on Go Wellington (92%) or Tranz Metro (91%) are significantly more likely to recommend the service than those using the Valley Flyer (83%).

3. Satisfaction with All Aspects of Public Transport Service

Of the 19 aspects of Wellington's public transport system considered, passengers are most satisfied with their **personal security during the current trip**, almost all (95%) rating this aspect positively, including full satisfaction among ferry passengers (100% satisfied). Ratings are also very positive for accessibility to the vehicles, including 94% satisfied with the ease of getting on/off the vehicle and 94% giving a positive rating for the ease of getting onto the vehicle from the stop/station/wharf.

In contrast, passengers are least satisfied with the **provision of information about service delays or disruptions**, with only 69% satisfied to some extent. However, in comparison with last year, passengers are more likely to be satisfied with this aspect of the service (overall satisfaction up from 65% to 69%). Train passengers are particularly more satisfied about getting information for service delays/disruptions (73%) than bus passengers (67%) this year. Ferry passengers continue to give poor ratings for the provision of shelter at the wharf (55% satisfied).

Summary Table 6: Satisfaction with Aspects of Public Transport Service (%)

Share Giving Positive Ratings (6-10)

Aspect of Service	Total Sample			Bus			Train			Ferry		
	2014 <i>(n=4,298)</i>	2015 <i>(n=4,426)</i>	2016 <i>(n=2,347)</i>	2014 <i>(n=1,346)</i>	2015 <i>(n=1,385)</i>	2016 <i>(n=642)</i>	2014 <i>(n=2,799)</i>	2015 <i>(n=2,881)</i>	2016 <i>(n=1,575)</i>	2014 <i>(n=153)</i>	2015 <i>(n=159)</i>	2016 <i>(n=132)</i>
Personal security during this trip	95	93	95	94	92	95	96 (↑B)	94	96	99 (↑B)	95	100
The ease of getting on the vehicle from the stop/station/wharf	94	93	94	93	92	93	95 (↑BF)	93 (↑B)	95	90	93	92
The ease of getting on/off the vehicle	-	-	94	-	-	93	-	-	95 (↑B)	-	-	93
The stop/station/wharf being easy to get to	91	90	92	93 (↑T)	92	93	90	90	91	94	95 (↑T)	94
Comfort of the inside temperature	90	88	91	90	88	91	90	88	90	95 (↑BT)	90	95
The helpfulness of the driver/staff	89	87	90	85	85	89	90 (↑B)	87 (↑B)	93 (↑B)	95 (↑BT)	95 (↑BT)	96
The attitude of the driver/staff	89	86	89	86	84	87	89 (↑B)	87 (↑B)	92 (↑B)	98 (↑BT)	95 (↑BT)	97
Your personal safety at the stop/station/wharf	86	85	89	85	84	88	87	86	89	92 (↑B)	88	92
The information available at the stop/station/wharf	83	83	87	80	85	87	85 (↑B)	83	89	80	80	88
The travel time	83	82	87	81	81	86	83	83	88	79	83	88
Ease of getting information about public transport routes and timetables	83	83	86	84	82	85	83	84	88	88	87	92
The cleanliness of the stop/station/wharf	82	79	86	80	77	85	82	80	86	96 (↑BT)	95 (↑BT)	94
Having enough seats available	84	79	84	87 (↑T)	82 (↑T)	87 (↑T)	82	76	77	95 (↑BT)	88 (↑T)	91

Aspect of Service	Total Sample			Bus			Train			Ferry		
	2014 <i>(n=4,298)</i>	2015 <i>(n=4,426)</i>	2016 <i>(n=2,347)</i>	2014 <i>(n=1,346)</i>	2015 <i>(n=1,385)</i>	2016 <i>(n=642)</i>	2014 <i>(n=2,799)</i>	2015 <i>(n=2,881)</i>	2016 <i>(n=1,575)</i>	2014 <i>(n=153)</i>	2015 <i>(n=159)</i>	2016 <i>(n=132)</i>
How often the service runs	80	78	81	78	75 (↑F)	80	81	80 (↑BF)	84 (↑B)	81	67	84
How convenient it is to pay for public transport	76	77	81	80 (↑T)	81 (↑T)	84 (↑T)	74	74	77	81	84 (↑T)	84
The service being on time	77	69	81	77	72 (↑T)	78	77	67	84 (↑B)	91 (↑BT)	90 (↑BT)	91
The value for money of the fare	70	72	76	72 (↑T)	74 (↑T)	76	68	70	75	81 (↑BT)	77	88
The stop/station/wharf providing shelter from the weather	71	71	72	67 (↑F)	67 (↑F)	68	75 (↑BF)	74 (↑BF)	81 (↑B)	38	53	55
Information about service delays or disruptions	62	65	69	55	64	67	65 (↑B)	66	73 (↑B)	67 (↑B)	73 (↑B)	79

Aspects of current trip	Aspects of stop/station/wharf	Aspects of public transport system overall
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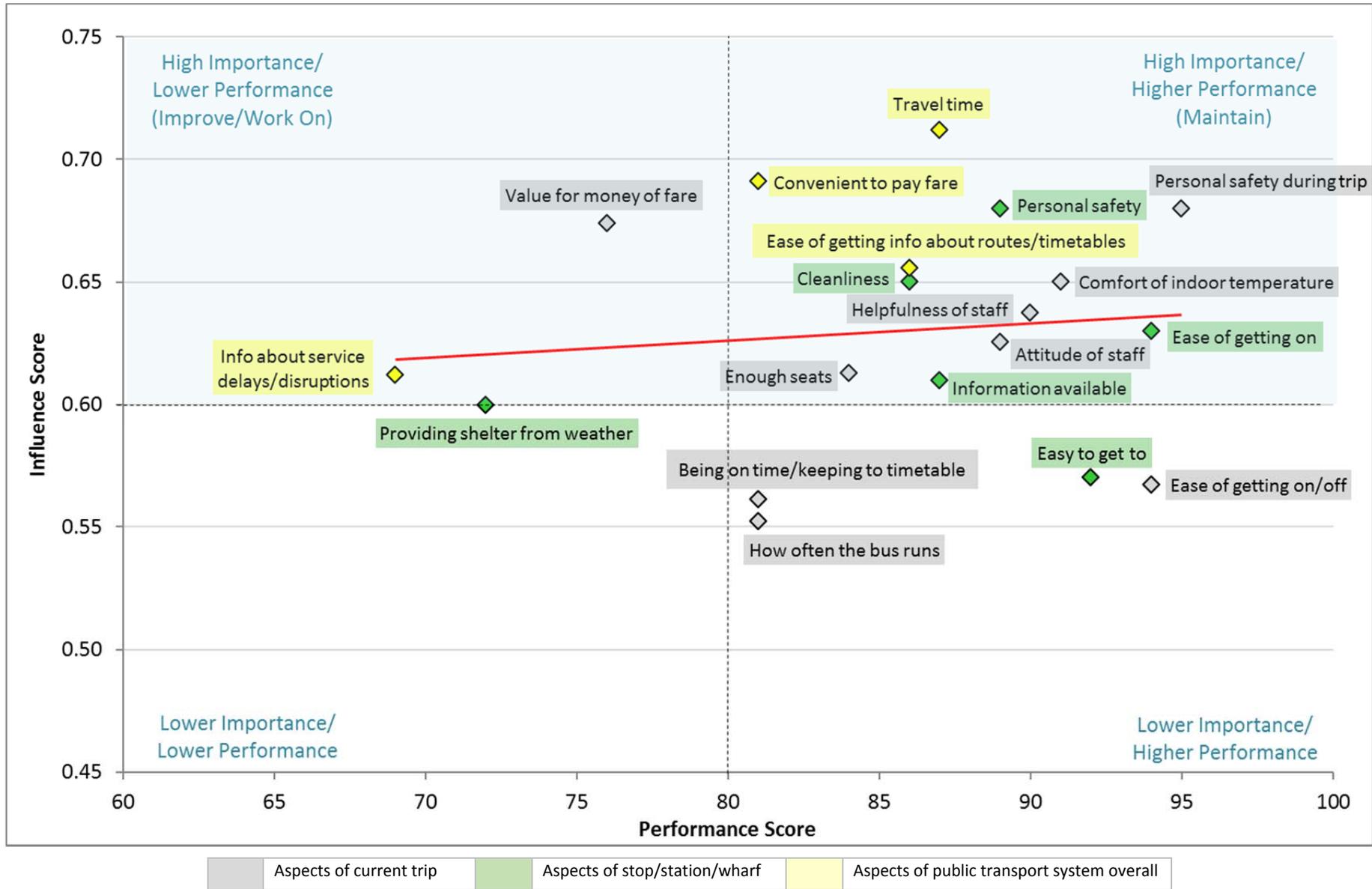
4. Current Performance On What Is Most Important To Passengers

Summary Figure 1 maps the current performance on each aspect of Wellington's public transport system by the aspect's relative influence on overall satisfaction. The trend line³ slopes up and to the right. This result indicates a good match between performance and influence, with the public transport service performing well on those aspects of service that are most important to passengers.

Key areas of concern are the **provision of information about service delays and disruptions**, the **value for money of the fare**, and the **provision of shelter from the weather at the stop/station/wharf**. These aspects have been identified as core drivers of overall satisfaction (positioned in the top half of the grid), but are currently the most poorly performing aspects of Wellington's public transport system. These areas should be prioritised for improvement over the next 12 months as enhancements to these aspects can be expected to have a notable positive impact on overall satisfaction.

³ The trend line assists in depicting the overall relationship between relative influence and performance across the service attributes/drivers. In an ideal situation, the trend line should slope up to the right. This illustrates that the public transport system is performing best on those aspects of service that are most important to passengers/that have the greatest influence on overall satisfaction. A trend line that slopes down to the right indicates a mismatch between performance and importance/influence – that is, at least one service attribute identified as core/important to passengers is currently under-performing (suggesting the need for more resource in this area for example, planning, training, quality control etc.) and/or at least one service attribute with a high performance rating is identified as having little or no importance to passengers/has only minimal influence on overall satisfaction.

Summary Figure 1: Performance on All Aspects of Service Versus Influence on Overall Satisfaction



5. Moving Forward

1. *Suggestions for Improvement to Public Transport Services*

More frequent services (mentioned by 7% of respondents), and a desire for **cheaper fares** (mentioned by 6% of respondents, along with a further 4% calling for cheaper fares for students specifically) are the most frequently mentioned suggestions for improvements to Wellington’s public transport system. Only 4% mention **improving the reliability of services** this year, down significantly from 10% last year.

Summary Table 7: Suggestions for Improvement to Public Transport Services (%)

Suggestion for Improvement	Total Sample		
	2014 <i>(n=4,298)</i>	2015 <i>(n=4,426)</i>	2016 <i>(n=2,361)</i>
More frequent services	8	8	7
Cheaper fares	10	7	6
More buses on the route/more carriages/more seats available/reduce overcrowding	6	6	6
Integrated ticketing/automate ticketing system	6	6	5
Improved reliability of services – run on time/to timetable	10	10	4
Cheaper fares for students	4	2	4
Friendlier drivers	3	3	3
Improvements to stops/stations/wharves (shelters, seating, toilets, rubbish bins etc.)	2	3	3
More/more frequent weekend/late night/holiday services	3	3	3
More stops/destinations, wider coverage of service	2	2	2
Better connections/co-ordination between services	2	1	2

Base: All respondents.

Table lists those improvements mentioned by 2% or more of respondents.

Orange highlighting denotes a statistically significant change from the previous year.

2. *Suggestions for Improvement to Stop/Station/Wharf*

Similar to previous years, the most frequently mentioned suggestion for improvement to the stop/station/wharf is the **provision of more and/or improved shelter from the weather** (19%). This included 22% of bus passengers and 30% of those using the ferry. Train passengers are significantly less likely to make this suggestion when compared to last year (down from 17% to 14% this year). Other frequently mentioned suggestions relating to the physical infrastructure include cleaner stops/stations/wharves (6%) and the provision of information about public transport and the services available at the stop/station/wharf (5%) or install more Real Time information boards (5%). Another 4% alluded to the need for more seats.

Summary Table 8: Suggestions for Improvement to Stop/Station/Wharf (%)

Suggestion for Improvement	Total Sample		
	2014 (n=4,298)	2015 (n=4,436)	2016 (n=2,361)
More/improved shelter from weather (wind, rain, sun)	19	18	19
Cleaner stops and stations, including having more rubbish bins available	8	9	6
More info available/info easier to read (e.g. timetables, pricing, routes)	5	4	5
More Real Time Information boards/digital displays	4	3	5
More seats available	5	4	4
Ensure electronic signs correct/show actual times/face right way etc.	1	3	2
Better lighting	3	2	2
Maintenance work – fix leaks in roof, holes in footpath, remove graffiti, replace broken glass etc.	2	2	2
More/improved parking available	3	2	2

Base: All respondents.

Table lists those improvements mentioned by 2% or more of respondents.

6. Access to Public Transport Information

Public transport users are most likely to have used the Metlink website (75%) or information available at the stop/station/wharf, including Real Time Information boards (71%). Printed timetables (35%), smartphone app. or widget (29%) and the Metlink Call Centre (12%) are less commonly used.

More than three-quarters of public transport users (77%) reported having used multiple sources of public transport information in the last three months. Only one in five (20%) had used a single information source and 3% reported not having used any public transport information in the last three months. The average number of sources of public transport information used is 2.3.

Most public transport users (89%) are satisfied to some extent with the public transport information currently available, including 16% who are *extremely satisfied*. Only 4% express any dissatisfaction. Levels of satisfaction are similar, irrespective of the source of public transport information currently used, ranging from 90% among those using a smartphone app. or widget to 84% of Metlink Call Centre users.

To improve the provision and quality of public transport information further, users would like to see:

- more Real Time Information boards installed (4%);
- more regular checks to ensure that the current Real Time Information boards are operational and accurate (3%);
- making the Metlink website more user-friendly/easier to navigate (3%); and
- improving the text alert service to ensure that texts arrive early enough to be useful (3%).