

2014/15 PUBLIC TRANSPORT PASSENGER SATISFACTION SURVEY

EXECUTIVE SUMMARY - Pages 1-10



Gravitas Research and Strategy Limited

Level 12, Wellesley Centre,

44-52 Wellesley St, Auckland

PO Box 3802, Shortland St, Auckland

tel. 09 356 8842, fax. 09 356 5767

e-mail. info@gravitas.co.nz

Contents

Executive Summary	1
1. Introduction	11
2. Research Approach and Design	12
2.1 Methodology	12
2.2 Sampling Frame, Size and Selection	12
2.3 Questionnaire Design	15
2.4 Questionnaire and Interview Pilot Process	15
2.5 Administrating the Interviews	15
2.6 Analysis and Reporting	16
2.7 Report Structure	18
3. Passenger Perceptions of Current Trip	20
3.1 Overall Satisfaction with Trip – All Modes	20
3.2 Comparative Perceptions of Trip	24
3.3 Current Trip – Drivers of Satisfaction	56
4. Passenger Perceptions of Stop/Station/Wharf	59
4.1 Overall Satisfaction with Stop/Station/Wharf – All Modes	60
4.2 Comparative Perceptions of Stop/Station/Wharf	61
4.3 Bus Stop/Train Station/Ferry Wharf – Drivers of Satisfaction	75
4.4 Suggestions for Improvement to Stop/Station/Wharf	78
5. Passenger Perceptions of Wellington Region’s Public Transport System	84
5.1 Overall Satisfaction with Wellington Region’s Public Transport System	85
5.2 Comparative Perceptions of Wellington Region’s Public Transport System	86
5.3 Wellington Region’s Public Transport System – Drivers of Satisfaction	95
6. Moving Forward	97
6.1 Likelihood of Recommending Public Transport to Others	98
6.2 Suggestions for Improvement to Public Transport Services	101
7. Satisfaction with the Provision of Public Transport Information	107
7.1 Satisfaction with the Provision of Public Transport Information	107
7.2 Suggestions for Improvement to Provision of Public Transport Information	113

Appendix One: Wellington Region Public Transport Customer Satisfaction	1
Appendix Two: Sample Profile	6
Appendix Three: Questionnaire	7
Appendix Four: Suggestions for Improvements (Full Lists)	11
Appendix Five: Satisfaction with All Aspects of Public Transport System By Mode	18

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 2014/15 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.

A random sampling technique was used to select the trips to be surveyed. In total n=209 public transport trips were surveyed on, generating n=4,456 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	209	106	88	15	4456	1162	3010	284
Maximum margin of error <i>(at 95% confidence interval)</i>	-	-	-	-	± 1.5%	± 2.9%	± 1.8%	± 5.8%

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

Live surveying was conducted between the 21st of April and 10th of May 2015. Questionnaires were distributed to every passenger aged 15 years or older on randomly-selected bus and ferry services and to every second passenger aged 15 years or older on train trips. The response rate was 63%¹ for all services combined.

To allow for accurate comparisons of results with those from the 2013/14 survey, the 'total' (all modes) results presented in this report have been weighted so that the distribution by mode (that is, the share of bus, train and ferry respondents) in the 'total' results matched that of last year's survey.

¹ 73% among ferry passengers, 63% for train passengers and 60% 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

In general, Wellington public transport users are satisfied to some extent with their current trip overall, 89% giving a positive rating (that is, between 6 and 10), including 14% who are *extremely satisfied* (giving a rating of 10 out of 10). Just 5% of respondents express dissatisfaction with their current trip overall.

However, whilst levels of overall satisfaction are high, they are down significantly since last year, when 92% gave a positive rating and just 3% were dissatisfied. Significant declines in perceptions of the trip are evident for bus and train passengers, the share satisfied to some extent down from 92% to 89% for both modes.

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

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

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

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.

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

Results show no significant differences in overall satisfaction between operators, with the exception of Valley Flyer passengers, who are more likely to be dissatisfied than those travelling by East by West Ferries (1%) and Go Wellington (3%). Among bus operators, Go Wellington passengers (90%) are significantly less likely to be satisfied overall than they were last year (93%).

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, 90% giving a positive rating (between 6 and 10), including 15% of respondents giving a rating of 10 out of 10. Only 4% of respondents are dissatisfied with the stop, station or wharf. These results are stable from last year. Ratings are similar by mode, 93% of ferry passengers, 90% of train passengers and 89% of those travelling by bus satisfied to some extent with the stop/station/wharf where they commenced their trip. Results by mode are also stable from last year.

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

	Total		Bus		Train		Ferry	
	2014	2015	2014	2015	2014	2015	2014	2015
Rating	(N=4,190)	(N=4,328)	(n=1,306)	(n=1,339)	(n=2,736)	(n=2,883)	(n=148)	(n=156)
Dissatisfied (0-4)	4	4	4	5	4	4	2	4
Neutral (5)	5	6	6	6	5	6	5	3
Satisfied (6-10)	91	90	90	89	91	90	93	93

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

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.

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, 83% expressing some degree of satisfaction (that is, giving a rating of between 6 and 10), including 9% who are *extremely satisfied*. In contrast, 8% of public transport users are dissatisfied with the region's public transport system. Levels of satisfaction are similar by mode. There are no significant changes in results over time.

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

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

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

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.

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 86% of respondents would recommend using public transport to a friend or colleague. This includes 20% who are *extremely likely* to recommend. Only 6% of respondents would not endorse Wellington's public transport services to others (down significantly from 8% last year). The level of recommendation is high for all three modes with no significant difference between bus (86%), train (86%) and ferry (90%) passengers.

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

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

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

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.

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 East by West (90%) are significantly more likely to recommend the service than those using the Valley Flyer (83%). There is no significant difference in the likelihood of recommending specific operators this year compared to last year.

3. Satisfaction with All Aspects of Public Transport Service

Of the 20 aspects of Wellington’s public transport system considered, passengers are most satisfied with their **personal security during the trip**, almost all (93%) rating this aspect positively, including 95% of ferry passengers. Ratings are also very positive for accessibility to the vehicles, including 92% satisfied with the **ease of getting on and off the vehicle** and 93% giving a positive rating for the **ease of getting onto the vehicle from the stop/station/wharf**. However, the share of positive perceptions are down significantly for all four aspects since last year. This is especially true for those passengers who travel by train.

In contrast, passengers are least satisfied with the **provision of information about service delays or disruptions**, only 65% satisfied, including just 64% of bus passengers. However, in comparison with last year passengers are more likely to be satisfied with this aspect of the service this year (up from 62% to 65%). This increase in positive ratings is particularly evident among bus passengers (up from 55% to 64% this year).

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 (N=4,298)	2015 (N=4,426)	2014 (n=1,346)	2015 (n=1,385)	2014 (n=2,799)	2015 (n=2,881)	2014 (n=153)	2015 (n=159)
Personal security during this trip	95	93	94	92	96 (↑B)	94	99 (↑B)	95
The ease of getting on the vehicle from the stop/station/wharf	94	93	93	92	95 (↑BF)	93 (↑B)	90	93
The ease of getting on the vehicle	94	92	92	92	95 (↑B)	93	92	89
The ease of getting off the vehicle	94	92	91	91	95 (↑B)	93 (↑B)	94	90
The stop/station/wharf being easy to get to	91	90	93 (↑T)	92	90	90	94	95 (↑T)
Comfort of the inside temperature	90	88	90	88	90	88	95 (↑BT)	90
The helpfulness of the driver/staff	89	87	85	85	90 (↑B)	87 (↑B)	95 (↑BT)	95 (↑BT)
The attitude of the driver/staff	89	86	86	84	89 (↑B)	87 (↑B)	98 (↑BT)	95 (↑BT)
Your personal safety at the stop/station/wharf	86	85	85	84	87	86	92 (↑B)	88
The information available at the stop/station/wharf	83	83	80	85	85 (↑B)	83	80	80
Ease of getting information about public transport routes and timetables	83	83	84	82	83	84	88	87
The travel time	83	82	81	81	83	83	79	83
Having enough seats available	84	79	87 (↑T)	82 (↑T)	82	76	95 (↑BT)	88 (↑T)
The cleanliness of the stop/station/wharf	82	79	80	77	82	80	96 (↑BT)	95 (↑BT)
How often the service runs	80	78	78	75 (↑F)	81	80 (↑BF)	81	67
How convenient it is to pay for public transport	76	77	80 (↑T)	81 (↑T)	74	74	81	84 (↑T)
The value for money of the fare	70	72	72 (↑T)	74 (↑T)	68	70	81 (↑BT)	77
The stop/station/wharf providing shelter from the weather	71	71	67 (↑F)	67 (↑F)	75 (↑BF)	74 (↑BF)	38	53
The service being on time	77	69	77	72 (↑T)	77	67	91 (↑BT)	90 (↑BT)
Information about service delays or disruptions	62	65	55	64	65 (↑B)	66	67 (↑B)	73 (↑B)

Aspects of current trip Aspects of stop/station/wharf Aspects of public transport system overall

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.
 Letter notation denotes mode(s) that this result is significantly higher than in the survey wave; B=Bus, T=Train, F=Ferry.

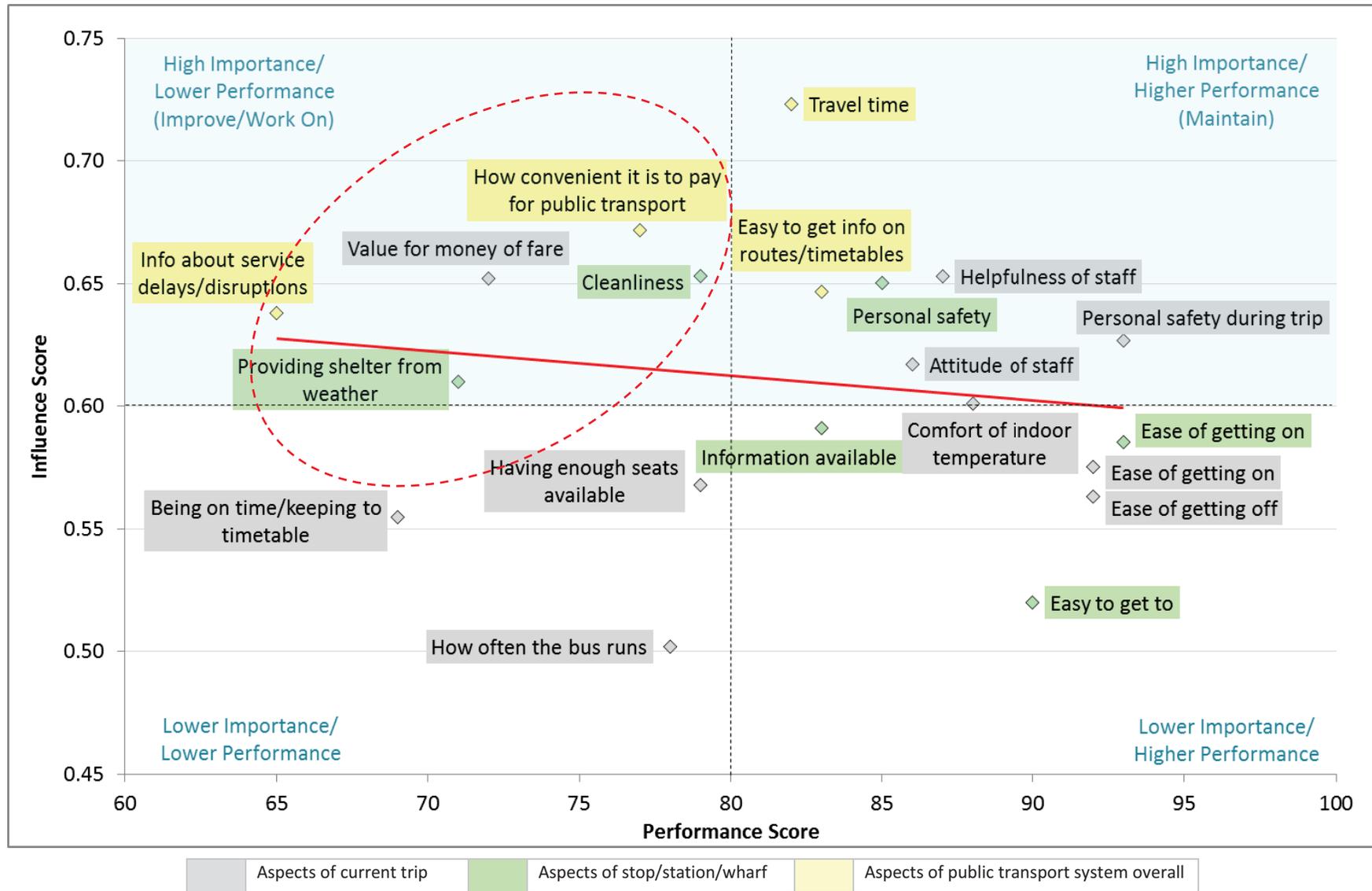
4. Current Performance On What Is Most Important To Passengers

Summary Figure 1 maps the current performance of each aspect of Wellington's public transport system by the aspect's relative influence on overall satisfaction. The trend line² slopes down and to the right. This result indicates a mismatch between performance and influence, with the public transport service performing less well on at least one of the most influential drivers of satisfaction.

Key areas of concern are the **provision of information about service delays and disruptions**, the **value for money of the fare**, the **provision of shelter from the weather at the stop/station/wharf**, the **convenience of paying for public transport** and the **cleanliness of 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. (Note that, with the exception of cleanliness of the stop/station/wharf, these were also the key areas of concern in 2013/14.) 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.

² 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*

Improved reliability of services (mentioned by 10% of respondents), and a desire for **more frequent services** (mentioned by 8% of respondents) are the most frequently mentioned suggestions for improvements to Wellington’s public transport system. Seven per cent of passengers call for **cheaper fares** (the frequency of mention down significantly from 10% last year).

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

Suggestion for Improvement	Total Sample	
	2014 (N=4,298)	2015 (N=4,426)
Improved reliability of services – run on time/to timetable	10	10
More frequent services	8	8
Cheaper fares	10	7
More buses on the route/more carriages/more seats available/reduce overcrowding	6	6
Integrated ticketing/automate ticketing system	6	6
Friendlier drivers	3	3
Improvements to stops/stations/wharves (shelters, seating, toilets, rubbish bins etc.)	2	3
More/more frequent weekend/late night/holiday services	3	3

Base: All respondents.

Table lists those improvements mentioned by 3% or more of respondents. Full list is provided in Appendix Four.

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.

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

In line with the high level of dissatisfaction expressed, the most frequently mentioned suggestion for improvement to the stop/station/wharf is the **provision of more and/or improved shelter from the weather** (18%). This includes 20% of bus passengers and 26% of those using the ferry. However, ferry passengers are significantly less likely to make this suggestion when compared to last year (down from 36% to 26%).

Other frequently mentioned suggestions relating to the physical infrastructure include cleaner stops/stations/wharves (9%) and the need for more seating (4%). Improving the provision of information available at the stop/station/wharf is also frequently cited, 4% calling for more information to be made available, 4% suggesting the need for better information about service delays, disruptions and changes (such as buses replacing trains) and 3% wanting the installation of Real Time Information boards

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

Suggestion for Improvement	Total Sample	
	2014 (N=4,298)	2015 (N=4,436)
More/improved shelter from weather (wind, rain, sun)	19	18
Cleaner stops and stations, including having more rubbish bins available	8	9
More seats available	5	4
More information available/information easier to read (e.g. timetables, pricing, routes etc.)	5	4
More information/better warning of service delays/disruptions/replacement buses	3	4
More Real Time Information boards	4	3
Ensure electronic signs are correct/show actual times/face the right way etc.	1	3

Base: All respondents.

Table lists those improvements mentioned by 3% or more of respondents. Full list is provided in Appendix Four.

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.

6. Satisfaction with the Way Public Transport Information is Provided

Of the three sources of public transport information considered, passengers were most satisfied with **Metlink websites or mobile sites** (79%). Those who travel by bus (81%) were significantly more likely to be satisfied with the website and mobile sites than those travelling by train (77%).

Seventy-eight per cent of respondents were satisfied with the **Real Time information** available at stops, stations and wharves. Train passengers (78%) were significantly more likely to be satisfied with the Real Time information at their station than those travelling by ferry (71%). Of the three sources of public transport information considered, users were least satisfied with the **Metlink call centre** (73% satisfied and 15% dissatisfied).

Summary Table 6: Satisfaction with the Way Public Transport Information is Provided – By Mode
Share Satisfied/Very Satisfied (%)

	Sample Size (n)	Total	Bus	Train	Ferry
Information Source					
Metlink websites/mobile sites	3,809	79	81 (T)	77	78
Real Time Information	4,025	78	78	78 (F)	71
Metlink call centre	1,662	73	75	72	73

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

2015 results that are orange indicate a result that is significantly different (higher or lower) than the 2014 result.

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

When asked for suggestions to improve the way public transport information is provided, key suggestions included:

- ensuring the accuracy of the information provided on Real Time Information boards (and ensuring these are operational) (9%);
- the provision of a smartphone app (6%);
- making the Metlink website more user-friendly (5%); and
- improving the announcements about service delays and disruptions at stations, stops and ferry wharves.