

Environment Bay of Plenty

Bus Satisfaction Survey

FINAL Report

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1 Executive Summary

Performance of Bus Service

- The proportion of respondents rating the overall bus service as *Very Good* or *Excellent* – although remaining significantly high – has decreased, for each year of the survey for both Tauranga and Rotorua respondents.
 - Amongst Tauranga respondents, the proportion of respondents rating the overall bus service as *Very Good* or *Excellent* has decreased from 90% in 2006 to 81% in 2008.
 - Amongst Rotorua respondents, the proportion of respondents rating the overall bus service as *Very Good* or *Excellent* has decreased from 92% in 2006 to 86% in 2008.
 - Rotorua respondents are slightly more likely (86%) than Tauranga respondents (81%) to rate their local bus service as *Very Good* or *Excellent*.
- Overall the proportion of respondents rating the overall bus service as *Good* has increased from 6% in 2006 to 10% in 2008.
 - That is, 94% of bus users in Tauranga and Rotorua rate their local bus service as *Good / Very Good / Excellent*.
- The proportion of respondents rating the overall bus service as *Dreadful / Very poor / poor* has remained relatively stable over the course of the study.
- Three-quarters of bus users (75%) rate the service reliability as *Very Good* or *Excellent*, which represents a slight decrease since the 2006 survey (80%).
 - More Rotorua respondents (81%) than Tauranga respondents (70%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.
- Slightly more than four in every five bus users (81%) rate the service frequency as *Very Good* or *Excellent*, which represents a slight increase since the 2006 survey (79%).
 - More Rotorua respondents (89%) than Tauranga respondents (72%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.
- Perceived vehicle quality / comfort has decreased since the start of this survey, with slightly less than four in every five bus users (79%) rating this aspect of service as *Very Good* or *Excellent* (compared with 94% in the 2006 survey).
 - More Rotorua respondents (83%) than Tauranga respondents (75%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.
- Slightly more than four in every five bus users (81%) rate journey time as *Very Good* or *Excellent*, which represents a slight decrease since the 2006 survey (86%).
 - More Rotorua respondents (87%) than Tauranga respondents (76%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.
- Slightly less than four in every five bus users (79%) rate the service availability as *Very Good* or *Excellent*, which represents a slight decrease since the 2006 survey (82%).

- More Rotorua respondents (84%) than Tauranga respondents (75%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.
- Overall, the bus service is seen to represent good value for money by a significant proportion of respondents – with 91% of users rating this aspect of service as *Very Good* or *Excellent*, a slight increase from the 2007 survey (86%).
 - Rotorua respondents are slightly more likely (92%) than Tauranga respondents (89%) to rate this aspect as *Very Good* or *Excellent*.
- Although the large majority of bus users (85%) rate safety and personal security during the trip as *Very Good* or *Excellent*, this represents a slight increase since the 2006 survey (95%).
 - The same proportion of Rotorua respondents and Tauranga respondents (85%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.
- Slightly less than four in every five bus users (79%) rate safety and personal security at the stops as *Very Good* or *Excellent*, which represents an increase since the 2006 survey (89%).
 - More Rotorua respondents (84%) than Tauranga respondents (75%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Bus Users

- The majority of bus users use their local bus service *One or Two days per week*, with only a small minority using the service as regularly as *Five days a week or more* (12%).
- Tauranga bus users are more likely than Rotorua bus users to use their local bus service infrequently.
 - That is 56% of Tauranga respondents use their local bus service *One or two days per week* – compared with 47% of Rotorua respondents, whilst 24% of Rotorua respondents use their local bus service *Three or four days per week* – compared with 14% of Tauranga respondents.
- The majority of respondents (70%) use the bus service in *Off peak times (9am to 4pm)*.
 - Amongst Rotorua respondents, there has been a slight shift to *Off peak* usage from *Peak usage* between the 2006 survey (63%, 37%) and the 2008 survey (69%, 27%).
- *Shopping* (41%), *Work* (28%) and *Recreation* (19%) remain the principal purposes for travel on the bus service.
 - Tauranga respondents were more likely (43%) than Rotorua respondents (38%) to state *Shopping* as the main purpose for their travel, whilst Rotorua respondents were more likely (34%) than Tauranga respondents (22%) to state *Work* as the main purpose for their travel.
- The proportion of Tauranga respondents primarily using the local bus service for *Shopping* (43%) has increased significantly since the 2006 survey (28%).

- Slightly more than two in every three respondents (67%) have some access (*All / Some of the time*) to a private motor vehicle.
 - There has been an increase in the proportion of bus users with access to a private motor vehicle *All of the time* (44% in 2006, 51% in 2008), offset by a decrease in the proportion of respondents with access to a private motor vehicle *Some of the time* (25% in 2006, 16% in 2008).
- The majority of respondents (59%) use their local bus service principally because of factors restricting their access to, or usage of a car – that is, *No alternative / don't drive / only one car family / don't own car / poor health prohibits driving*.
- *Value for money / cheaper than a car* (35%), *Convenient / less hassle* (33%) and *Parking - costs / availability* (19%) are also significant reasons for choosing public transport ahead of private transportation.
 - Tauranga bus users were more likely than Rotorua bus users to use public transport ahead of private transport for the majority of stated reasons.
- Tauranga bus users are more likely (40%) than Rotorua bus users (30%) to chose public transport due to *Value for money / cheaper than a car*.
 - And amongst Tauranga bus users, the proportion of bus users choosing to use public transport for this reason (40%) has doubled since the 2006 survey (2008).
- Although the largest proportion of respondents (36%) stated *Don't know/nothing/happy with service*, a wide range of responses were given as to aspects of the bus service they would like to see improved. None of these factors however is particularly dominant.
 - These factors include *Bus stops closer to home/more stops/wider service* (11%), *More frequent service* (8%), *Sheltered bus stops* (6%), *Sunday buses* (6%) and *Increase in hours/days of service* (5%).
- *The timetable booklet* (70%) and *Timetable information at the bus stops* (32%) are by far the main ways bus users use to find out about their services.
- Almost one-half of respondents (48%) have *Never* personally had experienced any of the stated issues with the bus service in the past twelve months.
 - Minorities of respondents did report experiencing the following issues: *Bus being significantly late* (22%), *Negative experience with the driver* (18%), *Bus being driven unsafely* (16%) and *Bus not turning up* (14%).

Non-Bus Users

- *Convenience/flexibility/independence* is by far (53%) the main reason why non-users use private transport instead of public transport.
- Slightly more than one-quarter of respondents stated that they *Own a car and prefer to use that*.
- A number of other reasons were also stated, none of which were dominant, such as *Private transport is quicker/no waiting* (14%), *Too far to walk to catch bus/no bus stops nearby* (14%), *Do a lot of travelling/job requires car/have work car* (13%) and *Buses are not available when needed* (12%).
 - Of the key reasons stated, only *Too far to walk to catch bus/no bus stops nearby* and *Do a lot of travelling/job requires car/have work car* were more

prominent amongst Rotorua respondents (17%, 14%) than Tauranga (12%, 11%) respondents.

- Almost three-quarters of non- users claim that they *Would consider* using the bus service.
 - The proportion of non-users willing to consider using their local bus service has increased significantly – from 61% (2006) to 76% (2008).
- Tauranga respondents (79%) were slightly more likely than Rotorua respondents (72%) to consider using the bus service.
- Respondents gave a wide variety of factors that could influence them into using the service, the most frequently mentioned of which are – *Creation of bus stops closer to home/more bus stops/wider service area* (20%), *Change in personal situation/health/employment/mindset* (19%) and *Loss of use of vehicle/increases in petrol prices* (13%).
 - Tauranga respondents were more likely than Rotorua respondents to state *Change in personal situation/health/employment/mindset* (24%, 16%) and *Loss of use of vehicle/increases in petrol prices* (16%, 9%).

1.1 Recommendations

The following recommendations are based on interpretation and analysis of the research findings by Key Research staff.

Improvements to Service

- The *Quality and comfort* of vehicles is an area where improvements may be necessary. There has been a 12 percentage point decrease (over the course of the study) in the proportion of users rating this aspect of the service as *Very good* or *Excellent*.
- Driver training and education may be an area of priority, with sizeable minorities of users experiencing negative issues (such as unsafe driving or a bad experience with the driver).
- Making the service easier for those with small children, and luggage/shopping may promote further use of the service.
- To fund any improvements in the service, there is possible scope for additional increases in bus fares, with 68% of users stating that the services provide *Excellent value for money*.

Frequency of Usage

- The bus service remains, in the main, an infrequent mode of transport, with the majority of users using the service *One or two days a week*, and only one-quarter of users using it *Five days a week, or more often*. In addition, the majority by far of bus use occurs during *Off-peak times*.
- As frequency of usage is naturally driven by the underlying reasons for usage (with *Shopping* account for the most common response amongst users), there exists potential to convert these infrequent users to more frequent usage via marketing communications (e.g. advertising and promotions).
- And because the majority of bus users have access to a private motor vehicle *All of the time* (51%) or *Some of the time* (16%), the key challenge is to grow bus usage by persuading these people to leave their car at home more often.
- Bus usage is also driven by necessity rather than choice, with 59% of users not having any other alternative (in terms of access, health issues or other reasons).
- *Social responsibility* is not a trigger or motivation for anything but a minority of bus users and should not be a key area of focus in marketing communications.
- Of those with a choice of travel modes, motivations for bus usage centre around value for money (compared to a car, and in relation to parking). These are key advantages that could be communicated to potential users and infrequent users alike.

The conundrum in all of this is that over three-quarters of non-users would consider using the bus service - a figure that has increased over each year of the study. Given the rapidly increasing cost of personal vehicle use, there now appears to be an excellent window of opportunity to grow bus usage. However, we believe that further research is needed to both qualify and quantify this possible opportunity.

2 Introduction

Environment Bay of Plenty (EBOP) is responsible for planning and contracting for public transport services within the Bay of Plenty region. It contracts for bus services in Tauranga, Rotorua, and the Eastern Bay of Plenty.

To enable the Council to deliver these services, it receives financial assistance from the central government agency, Land Transport New Zealand (LTNZ). In receiving that assistance, there are a number of requirements that the Council has to meet.

One of those is to conduct an annual passenger survey of its contracted bus services. The purpose of the survey is to establish passenger's perceptions of the quality of these services.

To this end, Key Research were commissioned in 2006 and 2007 to undertake a study involving users of the bus service as well as non-bus users to assess perceptions of the EBOP bus service.

The 2008 survey is the third of these surveys.

This report outlines the methodology and outcomes of this research process.

2.1 Research Objectives

The primary research objectives were to:

- Establish the levels of satisfaction with the bus services in Rotorua and Tauranga.
- Determine the demographic characteristics of users of the bus services.
- Identify the most important factor that could be improved in the service.

A secondary research objective was to:

- Determine the reasons for non-use of the bus services (for those who do not use the bus services).

2.2 Research Method

This study involved 852 telephone interviews with 416 bus users and 436 non-bus users.

- Interviewing took place between Tuesday May 27th and Sunday June 8th 2008.
- The overall results have a margin of error of +/-3.36% at the 95% confidence level.

The following steps were taken to ensure objectivity, validity and reliability of the study:

- The questionnaire was designed by executives from Key Research in partnership with Environment Bay of Plenty.
- Respondents were selected for participation using Telecom's random number generation service.
- All telephone interviews were conducted by trained and experienced Key Research interviewers.
- The research results were processed electronically using statistical software and analysed by executives from Key Research.

3 Research Results – Bus Users

The following section details the research findings amongst bus users.

3.1 Satisfaction Ratings

Respondents were asked to state their perceived level of performance of the bus service for a number of different attributes.

- The proportion of respondents rating the overall bus service as *Very Good* or *Excellent* – although remaining significantly high – has decreased, for each year of the survey for both Tauranga and Rotorua respondents.
 - Amongst Tauranga respondents, the proportion of respondents rating the overall bus service as *Very Good* or *Excellent* has decreased from 90% in 2006 to 81% in 2008.
 - Amongst Rotorua respondents, the proportion of respondents rating the overall bus service as *Very Good* or *Excellent* has decreased from 92% in 2006 to 86% in 2008.
 - Rotorua respondents are slightly more likely (86%) than Tauranga respondents (81%) to rate their local bus service as *Very Good* or *Excellent*.
- Overall the proportion of respondents rating the overall bus service as *Good* has increased from 6% in 2006 to 10% in 2008.
 - That is, 94% of bus users in Tauranga and Rotorua rate their local bus service as *Good* / *Very Good* / *Excellent*.
- The proportion of respondents rating the overall bus service as *Dreadful* / *Very poor* / *poor* has remained relatively stable over the course of the study.

Table 1:

Overall bus service	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	3	5	4	3	2	3	3	4	3
Good	7	8	12	6	5	8	6	6	10
Very Good	30	37	28	31	25	28	31	31	28
Excellent	60	49	53	61	68	58	60	58	56
Don't know	0	0	3	0	1	4	0	1	4
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Three-quarters of bus users (75%) rate the service reliability as *Very Good* or *Excellent*, which represents a slight decrease since the 2006 survey (80%).
 - More Rotorua respondents (81%) than Tauranga respondents (70%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Table 2:

Service reliability	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	12	8	9	5	6	5	7	7	7
Good	16	14	18	10	13	13	13	14	15
Very Good	27	45	35	31	35	25	29	40	30
Excellent	45	32	35	55	45	56	51	38	45
Don't know	-	-	3	-	2	2	-	1	3
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Slightly more than four in every five bus users (81%) rate the service frequency as *Very Good* or *Excellent*, which represents a slight increase since the 2006 survey (79%).
 - More Rotorua respondents (89%) than Tauranga respondents (72%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Table 3:

Service frequency	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	14	12	10	7	4	4	10	8	7
Good	18	17	13	6	9	8	11	13	11
Very Good	27	35	27	23	21	22	25	28	25
Excellent	41	34	45	64	66	67	54	49	56
Don't know	-	2	5	-	1	-	-	2	2
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Perceived vehicle quality / comfort has decreased since the start of this survey, with slightly less than four in every five bus users (79%) rating this aspect of service as *Very Good* or *Excellent* (compared with 94% in the 2006 survey).
 - More Rotorua respondents (83%) than Tauranga respondents (75%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Table 4:

Vehicle quality / comfort	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	-	4	7	2	2	4	1	3	6
Good	7	15	17	9	10	13	8	12	15
Very Good	39	44	37	34	27	28	36	36	33
Excellent	53	37	38	56	61	55	55	48	46
Don't know	1	1	1	-	-	-	-	1	1
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Slightly more than four in every five bus users (81%) rate journey time as *Very Good* or *Excellent*, which represents a slight decrease since the 2006 survey (86%).
 - More Rotorua respondents (87%) than Tauranga respondents (76%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Table 5:

Journey time	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	9	5	7	3	5	3	5	5	5
Good	10	16	16	7	8	10	8	12	13
Very Good	33	45	30	26	28	21	29	37	25
Excellent	49	32	46	64	58	66	57	45	56
Don't know	-	2	3	-	1	-	1	1	1
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Slightly less than four in every five bus users (79%) rate the service availability as *Very Good* or *Excellent*, which represents a slight decrease since the 2006 survey (82%).
 - More Rotorua respondents (84%) than Tauranga respondents (75%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Table 6:

Service availability	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	13	9	9	5	5	6	9	7	8
Good	9	19	13	9	10	10	9	15	12
Very Good	27	35	26	22	23	17	24	29	21
Excellent	51	34	49	64	61	67	58	47	58
Don't know	-	3	3	-	1	1	-	2	2
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Overall, the bus service is seen to represent good value for money by a significant proportion of respondents – with 91% of users rating this aspect of service as *Very Good* or *Excellent*, a slight increase from the 2007 survey (86%).
 - Rotorua respondents are slightly more likely (92%) than Tauranga respondents (89%) to rate this aspect as *Very Good* or *Excellent*.

Table 7:

Value for money	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	1	3	3	4	3	3	2	3	3
Good	8	13	8	7	7	5	7	10	7
Very Good	22	29	24	23	21	22	22	25	23
Excellent	69	55	65	66	68	70	68	61	68
Don't know	<1	<1	1	<1	1	-	1	1	1
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Although the large majority of bus users (85%) rate safety and personal security during the trip as *Very Good* or *Excellent*, this represents a slight increase since the 2006 survey (95%).
 - The same proportion of Rotorua respondents and Tauranga respondents (85%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Table 8:

Safety and personal security during the trip	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	1	4	3	4	3	5	2	4	4
Good	2	14	9	3	13	10	3	13	9
Very Good	19	42	29	22	22	24	21	32	27
Excellent	78	39	56	72	61	61	74	50	58
Don't know	-	1	3	-	-	1	-	1	2
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

- Slightly less than four in every five bus users (79%) rate safety and personal security at the stops as *Very Good* or *Excellent*, which represents an increase since the 2006 survey (89%).
 - More Rotorua respondents (84%) than Tauranga respondents (75%) rate their bus service – on this aspect – as *Very Good* or *Excellent*.

Table 9:

Safety and personal security at the stops	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Dreadful / Very poor / Poor	1	7	6	7	6	4	5	6	5
Good	5	16	17	7	13	12	6	15	15
Very Good	20	42	27	23	24	27	22	33	27
Excellent	74	34	48	63	54	57	67	44	52
Don't know	-	1	3	-	3	-	-	2	1
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

3.2 Frequency of Use

Respondents were then asked how many days a week they use the bus service.

- The majority of bus users use their local bus service *One or Two days per week*, with only a small minority using the service as regularly as *Five days a week or more* (12%).
- Tauranga bus users are more likely than Rotorua bus users to use their local bus service infrequently.
 - That is 56% of Tauranga respondents use their local bus service *One or two days per week* – compared with 47% of Rotorua respondents, whilst 24% of Rotorua respondents use their local bus service *Three or four days per week* – compared with 14% of Tauranga respondents.

Table 10:

How many days a week do you use the bus service?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
One	38	42	34	38	21	28	38	31	31
Two	20	16	22	28	18	19	23	17	20
Three	15	8	10	15	13	18	15	10	14
Four	8	5	4	8	4	6	8	5	5
Five	15	10	8	10	11	9	12	11	8
Six	3	1	1	1	3	4	2	2	3
Seven	-	1	2	-	1	-	-	1	1
Don't know	-	1	8	-	2	2	-	2	5
Less often / it varies / occasionally	-	16	12	1	27	14	2	21	13
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

3.3 Main Purpose of Travel

Respondents were then asked what the main purpose of their travel on the bus service is.

- *Shopping* (41%), *Work* (28%) and *Recreation* (19%) remain the principal purposes for travel on the bus service.
 - Tauranga respondents were more likely (43%) than Rotorua respondents (38%) to state *Shopping* as the main purpose for their travel, whilst Rotorua respondents were more likely (34%) than Tauranga respondents (22%) to state *Work* as the main purpose for their travel.
- The proportion of Tauranga respondents primarily using the local bus service for *Shopping* (43%) has increased significantly since the 2006 survey (28%).

Table 11:

What is the main purpose of your travel on the bus service?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Shopping	28	38	43	38	40	38	35	39	41
Work	21	18	22	29	22	34	23	20	28
Recreation	13	17	21	9	13	16	11	15	19
Doctor/Hospital	7	5	6	1	4	4	4	5	5
Study (non school)	5	2	2	1	2	2	2	2	2
Visit friends	3	4	2	3	4	3	4	4	2
School	6	2	1	3	3	2	5	2	1
Sport	-	1	1	-	-	-	-	1	-
Other	16	13	2	17	12	2	16	12	2
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

Other responses from Rotorua respondents:

Going to the airport.

One town to another.

Too far to walk home.

Other responses from Tauranga respondents:

To go to the library. (3)

Everything.

In summer it's too hot to walk home.

3.4 Timing of Bus Use

Respondents were also asked when they usually use the bus service.

- The majority of respondents (70%) use the bus service in *Off peak times (9am to 4pm)*.
 - Amongst Rotorua respondents, there has been a slight shift to *Off peak* usage from *Peak usage* between the 2006 survey (63%, 37%) and the 2008 survey (69%, 27%).

Table 12:

When do you usually use the bus service?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Off peak times (9am to 4pm)	69	69	71	63	65	69	66	67	70
Peak times (7am to 9am or 4pm to 6pm)	31	26	27	37	32	27	34	29	27
It varies / anytime	-	5	2	-	3	4	-	4	3
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

3.5 Access to Private Transport

Users of the bus service were also asked if they have access to a private motor vehicle.

- Slightly more than two in every three respondents (67%) have some access (*All / Some of the time*) to a private motor vehicle.
 - There has been an increase in the proportion of bus users with access to a private motor vehicle *All of the time* (44% in 2006, 51% in 2008), offset by a decrease in the proportion of respondents with access to a private motor vehicle *Some of the time* (25% in 2006, 16% in 2008).

Table 13:

Do you have access to a private motor vehicle?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Yes – all of the time	37	52	49	47	44	53	44	48	51
Yes – some of the time	26	21	18	25	26	14	25	23	16
No	37	27	32	28	30	33	31	29	33
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

3.6 Motivation to Use Public Transport

Bus users were then asked why they use public transport instead of private transport.

- The majority of respondents (59%) use their local bus service principally because of factors restricting their access to, or usage of a car – that is, *No alternative / don't drive / only one car family / don't own car / poor health prohibits driving*.
- *Value for money / cheaper than a car* (35%), *Convenient / less hassle* (33%) and *Parking - costs / availability* (19%) are also significant reasons for choosing public transport ahead of private transportation.
 - Tauranga bus users were more likely than Rotorua bus users to use public transport ahead of private transport for the majority of stated reasons.
- Tauranga bus users are more likely (40%) than Rotorua bus users (30%) to chose public transport due to *Value for money / cheaper than a car*.
 - And amongst Tauranga bus users, the proportion of bus users choosing to use public transport for this reason (40%) has doubled since the 2006 survey (2008).

Table 14:

Why do you use public transport (instead of private transport)?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
No alternative / don't drive / only one car family / don't own car / poor health prohibits driving	55	45	65	39	54	54	46	49	59
Value for money / cheaper than a car	20	15	40	31	20	30	26	17	35
Convenient / less hassle	13	34	36	19	32	30	17	33	33
Parking - costs / availability	14	22	24	15	13	14	15	18	19
I like it	3	8	12	3	3	6	3	6	9
Socially responsible	-	6	9	4	5	9	2	6	9
Quicker	1	3	6	1	-	1	1	2	3
Miscellaneous	11	14	6	11	20	3	11	17	5
Total	117	147	198	123	147	147	121	148	172

Base: 416 respondents (2008)

Note: Multiple responses were permitted therefore the total percentages exceed 100%.

Other responses from Rotorua respondents:

Car was being fixed. (2)

To use the service, rather than not and lose it. (2)

Have to walk to get bus.

Just for change.

The car is staying at home in the shelter.

Other responses from Tauranga respondents:

So I can drink. (3)

Try and support it. (2)

Change from driving. (2)

My car was getting fixed. (2)

Very safe, reliable, co-operative staff

We live near the bus stop and it goes to town.

3.7 Desired Improvements

Respondents were also asked what is the most important aspect of service they would like to see improved, in regards to the bus service.

- Although the largest proportion of respondents (36%) stated *Don't know/nothing/happy with service*, a wide range of responses were given as to aspects of the bus service they would like to see improved. None of these factors however is particularly dominant.
 - These factors include *Bus stops closer to home/more stops/wider service* (11%), *More frequent service* (8%), *Sheltered bus stops* (6%), *Sunday buses* (6%) and *Increase in hours/days of service* (5%).

Table 15:

What is the most important factor that you would like to see improved in regards to the bus service?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Don't know/nothing/happy with service	29	29	34	43	43	38	36	36	36
Bus stops closer to home/more stops/wider service	8	12	12	9	7	9	9	9	11
More frequent service	18	9	11	6	4	5	12	7	8
Sheltered bus stops	3	14	9	4	3	3	4	9	6
Sunday buses	-	-	4	-	-	8	-	-	6
Increase in hours/days of service	14	13	3	17	9	7	16	11	5
More reliable/punctual service	7	2	6	3	1	4	5	1	5
Improve the manners of drivers	2	2	5	3	3	3	2	3	4
Evening and night buses	-	-	2	-	-	6	-	-	4
Easier for disabled/elderly/alter height of step into bus	3	3	2	5	4	5	4	3	3
Cheaper fares	3	2	3	3	2	3	3	2	3
Better signage/publicity of timetable	5	1	2	-	1	2	2	1	2
Bike racks	-	-	1	-	-	1	-	-	1
Bus lanes / more bus lanes	-	-	-	-	-	1	-	-	1
Multi-buy tickets	-	-	1	-	-	1	-	-	1
Other	8	13	7	7	23	5	7	18	6
Total	100	100	100	100	100	100	100	100	100

Base: 416 respondents (2008)

Other responses from Rotorua respondents:

Seatbelts. (2)

Better curbs at a bus stop.

Bigger buses in the early morning.

Bigger seats

Don't take off until the person has sat down.

Drivers tend to speed around corners.

Maintenance of the bus.

More help and facilities, to get baby prams on and off.

Sustain it for the future.

Where there is no seat in front of you there should be a handle to hold onto low on the aisle seat and on wall side as handle on wall.

Other responses from Tauranga respondents:

Seat belts for passengers for safety. (3)

Facilities for pushchairs. (2)

\$3 pay increase for drivers.

Better lighting at bus stops.

Bus maintenance needs to be improved.

More people to use it.

Roading.

Smoking at bus stop should be banned.

Some buses are over heated.

Would like bus stops to be tidier and kept free of graffiti.

3.8 Bus Use by Other Household Members

Bus users were then asked how many members of their household, including themselves, use the local bus service and how often they did so.

- The majority of bus users (72%) live in a household where at least one other household member uses the local bus service.

Table 16:

Members of household (including respondent) using local bus service	% of Respondents		
	2006	2007	2008
One	69	71	72
Two	19	19	18
Three	8	8	6
Four	2	2	2
Five	1	-	1
Total	100	100	100

Base: 416 respondents (2008)

- Almost half of these household members (46%) use the bus service *One or Two days per week*.

Table 17:

How many days a week do other members of your household use the bus service?	% of Respondents		
	2006	2007	2008
One	38	32	27
Two	25	17	19
Three	15	6	11
Four	8	8	3
Five	12	15	8
Six	2	1	5
Seven	-	3	1
Don't know	-	4	6
Other	-	14	20
Total	100	100	100

Base: 117 respondents (2008)

3.9 Methods of Finding Information on Bus Service

Bus users were then asked what ways they use to find out about public transport bus services.

- *The timetable booklet (70%) and Timetable information at the bus stops (32%) are by far the main ways bus users use to find out about their services.*

Table 18:

Which of the following do you use to find out about public transport bus services?	% of Respondents					
	Tauranga Respondents		Rotorua Respondents		Total Respondents	
	2007	2008	2007	2008	2007	2008
The timetable booklet (paper copy)	78	79	76	61	77	70
Timetable information at the bus stops	-	39	-	24	-	32
www.baybus.co.nz / website / internet	14	14	7	8	11	11
0800 4 BAYBUS	13	11	12	6	12	9
Other	6	6	18	12	12	9
Don't know / not sure / none	2	2	2	13	2	7
Total	113	151	115	124	114	138

Base: 416 respondents (2008)

Note: Multiple responses were permitted therefore the total percentages exceed 100%.

Other responses from Rotorua respondents:

I know the times (12)
Word of mouth. (4)
I ask the bus driver. (2)
I can see the bus go past every half hour.
I just know also, as it rains every 1/2 hour.
Newspaper.
Senior Citizens Advice System
Walk out and get my bus as they run very regularly.

Other responses from Tauranga respondents:

Newspaper. (3)
Observation. (2)
Memorised. (2)
Friends.
I speak to a driver.
Information centre.
I know the timetable.
I live near bus stop, so I can see the bus.

3.10 Bad Experience with Bus Service

Bus users were then asked if they personally had experienced any issues with the bus service in the past twelve months.

- Almost one-half of respondents (48%) have *Never* personally had experienced any of the stated issues with the bus service in the past twelve months.
 - Minorities of respondents did report experiencing the following issues: *Bus being significantly late* (22%), *Negative experience with the driver* (18%), *Bus being driven unsafely* (16%) and *Bus not turning up* (14%).

Table 19:

Have you personally experienced any of the following within the past twelve months?	% of Respondents		
	Tauranga Respondents	Rotorua Respondents	Total Respondents
Bus being significantly late	26	18	22
Negative experience with the driver	20	17	18
Bus being driven unsafely	18	14	16
Bus not turning up	15	13	14
Bus not stopping at bus stop	12	10	11
Being charged the wrong fare	15	4	10
Bus overcrowded with passengers	11	6	9
Incorrect route signage on the bus	11	5	8
None	43	54	48
Other	1	1	1
Total	172	142	157

Base: 416 respondents (2008)

Note: Multiple responses were permitted therefore the total percentages exceed 100%.

Other responses from Rotorua respondents:

Not enough bus cards available. Have more available.

Some bus seats are worn and lumpy, so they are uncomfortable to sit on.

Other responses from Tauranga respondents:

Road works slowing the trip and causing trip diversions.

Time to refill petrol on bus route, not acceptable. Bus breaking down three times.

4 Research Results – Non-Bus Users

Respondents who stated that they *did not use* the bus service were asked a series of different questions than bus users.

4.1 Reasons for Non-Bus Use

Non-users were first asked why they use private transport instead of public transport.

- *Convenience/flexibility/independence* is by far (53%) the main reason why non-users use private transport instead of public transport.
- Slightly more than one-quarter of respondents stated that they *Own a car and prefer to use that*.
- A number of other reasons were also stated, none of which were dominant, such as *Private transport is quicker/no waiting* (14%), *Too far to walk to catch bus/no bus stops nearby* (14%), *Do a lot of travelling/job requires car/have work car* (13%) and *Buses are not available when needed* (12%).
 - Of the key reasons stated, only *Too far to walk to catch bus/no bus stops nearby* and *Do a lot of travelling/job requires car/have work car* were more prominent amongst Rotorua respondents (17%, 14%) than Tauranga (12%, 11%) respondents.

Table 20:

Why do you use private transport instead of public transport?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total Respondents		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Convenience/flexibility/independence	51	56	59	61	54	46	55	55	53
Own a car and prefer to use that	5	18	33	3	15	19	4	17	26
Private transport is quicker/no waiting	8	7	20	8	11	8	8	9	14
Too far to walk to catch bus/no bus stops nearby	19	8	12	13	6	17	16	7	14
Do a lot of travelling/job requires car/have work car	12	10	11	10	5	14	11	8	13
Buses are not available when needed	16	18	16	12	8	7	14	13	12
Mobility issues make public transport inappropriate	4	9	7	8	12	6	6	11	7
Prefer to walk/cycle	10	4	5	5	2	9	8	3	7
Easier to transport luggage/shopping	7	12	7	5	12	4	6	12	5
Public transport not suitable with young children	4	4	5	10	8	5	6	6	5
Force of habit/too lazy to use public transport	4	3	6	4	6	5	4	4	5
Don't like public transport/unsure of public transport	11	4	7	11	1	3	11	2	5
Don't travel/go out often	4	4	4	1	1	2	3	3	3
Other	12	21	3	20	28	2	15	24	2
Total	173	178	195	182	169	147	175	174	171

Base: 436 respondents (2008), Note: Multiple responses permitted therefore total percentage exceeds 100%.

Other responses from Rotorua respondents:

Cheaper. (2)

Does not go to my children's school or to my work. Routes not suitable for me at the moment.

There are two of us and the bus fares for two people gets too costly.

Other responses from Tauranga respondents:

Does not go to the places I want to go. (2)

Bus does not go from Papamoa to Te Puke.

Buses don't go direct to where I want to go, which is Welcome Bay to Greerton.

I car pool, but if there was a direct route to Bethlehem I could use the bus.

Inconvenience of no bus route at Pyes Pa.

4.2 Likelihood of Bus Use

Non-bus users were then asked if they would ever consider using the bus service.

- Almost three-quarters of non- users claim that they *Would consider* using the bus service.
 - The proportion of non-users willing to consider using their local bus service has increased significantly – from 61% (2006) to 76% (2008).
- Tauranga respondents (79%) were slightly more likely than Rotorua respondents (72%) to consider using the bus service.

Table 21:

Would you ever consider using the bus service?	% of Respondents								
	Tauranga			Rotorua			Total		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Yes	58	72	79	65	67	72	61	70	76
No	37	23	17	31	32	24	35	27	20
Don't know / not sure	5	5	4	4	1	5	4	3	4
Total	100	100	100	100	100	100	100	100	100

Base: 436 respondents (2008)

4.3 Changes Required to Service

Those respondents who stated that they would consider using the bus service were then asked what would need to change for them to use the service.

- Respondents gave a wide variety of factors that could influence them into using the service, the most frequently mentioned of which are – *Creation of bus stops closer to home/more bus stops/wider service area* (20%), *Change in personal situation/health/employment/mindset* (19%) and *Loss of use of vehicle/increases in petrol prices* (13%).
 - Tauranga respondents were more likely than Rotorua respondents to state *Change in personal situation/health/employment/mindset* (24%, 16%) and *Loss of use of vehicle/increases in petrol prices* (16%, 9%).

Table 22:

What is the most important thing that needs to change in order for you to use the bus service?	% of Respondents								
	Tauranga Respondents			Rotorua Respondents			Total		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Creation of bus stops closer to home/more bus stops/wider service	18	15	17	18	18	21	18	16	20
Change in personal situation/health/employment/mindset	18	22	24	19	19	15	19	20	19
Loss of use of vehicle/increases in petrol prices	20	7	16	19	20	9	20	13	13
Increased hours/days of service	9	13	5	4	7	9	7	10	7
Provision of a more frequent service	10	4	4	8	4	8	9	4	6
Increased education of service/timetable	5	2	9	8	1	3	6	1	6
Creation of cheaper fares	6	3	2	2	1	3	4	2	2
Increases in reliability	2	-	4	-	1	1	1	1	2
Developing a more family/young child friendly service	2	-	1	2	2	-	2	1	-
Don't know/nothing	8	12	15	14	13	30	10	13	22
Other	3	22	3	7	14	2	4	19	2
Other	100	100	100	100	100	100	100	100	100

Base: 329 respondents (2008)

Other responses from Rotorua respondents:

Accommodation for bags.

Carry bikes.

Provisions for people carrying large amount of groceries.

Other responses from Tauranga respondents:

One ticket that you can use to get on and off when needed.

Can't fit push chairs on the bus. Drivers don't like them. No hooks on bus to put them on.

Difficulty co-ordinating young children's activities. Park and ride facility.

Smaller buses

Would like buses to be easier to get on and off.

4.4 Use by Other Household Members

Non-bus users were also asked if other members of their household use the bus service and, if so, how many days a week they used this service.

- The majority by far of non-users (91%) live in a household where at least one other household member uses the local bus service.

Table 23:

How many other members of your household use the local bus service at least once a month?	% of Respondents		
	2006	2007	2008
None	91	92	91
One	5	4	6
Two	3	2	3
Three	1	1	-
Four or more	-	1	-
Total	100	100	100

Base: 436 respondents (2008)

- Slight more than one-half of these household members (51%) use the bus service *One or Two days per week*.

Table 24:

How many days a week do other members of your household use the local bus service?	% of Respondents		
	2006	2007	2008
One	18	3	33
Two	25	12	18
Three	9	3	10
Four	5	-	3
Five	40	18	20
Six	3	6	5
Don't know	-	55	5
Other	-	3	8
Total	100	100	100

Base: 40 respondents (2008)

Note: small base size

5 Respondent Profile

Table 25:

Gender	% of Respondents	
	Bus Users	Non-Users
Male	26	33
Female	74	67
Total	100	100

Base: 852 respondents (2008)

Table 28:

Total Personal Income	% of Respondents	
	Bus Users	Non-Users
Under \$12,000	15	8
\$12,000 to \$24,999	28	20
\$25,000 to \$39,999	21	17
\$40,000 to \$59,999	10	20
\$60,000+	5	18
Refused	21	18
Total	100	100

Base: 852 respondents (2008)

Table 29:

Total Household Income	% of Respondents	
	Bus Users	Non-Users
Under \$12,000	5	2
\$12,000 to \$24,999	22	14
\$25,000 to \$39,999	16	9
\$40,000 to \$59,999	10	14
\$60,000 to \$90,099	11	19
\$90,000 to \$120,099	5	8
Over \$120,000	3	6
Refused	29	28
Total	100	100

Base: 852 respondents (2008)

Table 30:

Location	% of Respondents	
	Bus Users	Non-Users
Rotorua	49	51
Tauranga	51	49
Total	100	100

Base: 852 respondents (2008)

Passenger transport annual statistics

Passenger transport annual statistics as at 30 June: 2008

Approved organisation: Key Research Name of target community: Rotorua

PT mode Bus services

Passenger survey results

Overall service Overall, how do you rate the service?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	0	3	8	28	58

Service value for money Overall, how do you rate the value for money of the service?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	2	5	22	70

Service availability Is the service available when needed?

Dreadful	Very poor	Poor	Good	Very good	Excellent
1	2	3	10	17	67

Service time Is the journey time reasonable?

Dreadful	Very poor	Poor	Good	Very good	Excellent
1	1	2	10	21	66

Service frequency Does the service occur often enough?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	2	2	8	22	67

Service reliability Are the arrivals and departures of bus services on time (punctual)?

Dreadful	Very poor	Poor	Good	Very good	Excellent
1	1	3	13	25	56

Safety and security How do you rate your safety and personal security **during the trip**?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	4	10	24	61

Safety and security How do you rate your safety and personal security **at the stop(s)**?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	3	12	27	57

Vehicle quality/comfort Overall, how do you rate the vehicle?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	3	13	28	55

Reasons for using service What is the main reason for using public transport on this trip?

No alternative	Value for money	Quicker	I like it	To be socially responsible	Parking costs or availability
54	30	1	6	9	14

Passenger transport annual statistics

Passenger transport annual statistics as at 30 June: 2008

Approved organisation: Key Research

Name of target community: Tauranga

PT mode Bus services

Passenger survey results

Overall service Overall, how do you rate the service?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	3	12	28	53

Service value for money Overall, how do you rate the value for money of the service?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	1	8	24	65

Service availability Is the service available when needed?

Dreadful	Very poor	Poor	Good	Very good	Excellent
1	2	7	13	26	49

Service time Is the journey time reasonable?

Dreadful	Very poor	Poor	Good	Very good	Excellent
1	1	4	16	30	46

Service frequency Does the service occur often enough?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	2	8	13	27	45

Service reliability Are the arrivals and departures of bus services on time (punctual)?

Dreadful	Very poor	Poor	Good	Very good	Excellent
1	2	7	18	35	35

Safety and security How do you rate your safety and personal security **during the trip?**

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	3	9	29	56

Safety and security How do you rate your safety and personal security **at the stop(s)?**

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	5	17	27	48

Vehicle quality/comfort Overall, how do you rate the vehicle?

Dreadful	Very poor	Poor	Good	Very good	Excellent
0	1	6	17	37	38

Reasons for using service What is the main reason for using public transport on this trip?

No alternative	Value for money	Quicker	I like it	To be socially responsible	Parking costs or availability
65	40	6	12	9	24