



**Greater Wellington
Regional Council**

**Public Transport Customer
Satisfaction Monitor 2007**

Executive Summary

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1.1 Introduction

The Greater Wellington Regional Council (Greater Wellington) is responsible for the planning, funding and monitoring of passenger transport (bus, train and ferry) services in the Wellington region. Private companies, mostly under contract to the Council, are responsible for the operation of these services.

Greater Wellington's goal is to create a sustainable region. Public transport is an environmentally friendly and more sustainable alternative to single occupancy vehicles. Providing Wellington residents with a public transport system that meets their travel needs will help Greater Wellington achieve its goal.

Market Research 2007

In March 2007, Greater Wellington Council commissioned TNS to undertake a telephone survey to examine public satisfaction with public transport services in the Wellington region. A benchmark was established by TNS in 2003, with subsequent studies conducted in 2004, 2005 and 2006.

The overall purpose of this research was to examine public satisfaction (specifically in relation to the objectives and values of the Council) with public transport services in the Wellington region.

The survey was designed to ascertain information on public transport usage, current and potential customers of public transport, overall customer satisfaction, perceptions of specific aspects of public transport services, and key drivers of customer satisfaction.

TNS conducted Computer Operated Telephone Interviewing (CATI) with a total of n=750 Wellington region residents.

1.2 Performance against Organisational Values

The core values for public transport in the Wellington region are:

- Reliable
- Convenient
- Friendly
- Simple
- Quality.

Outlined below is the performance of Wellington public transport in these five key areas during 2007.

Reliability

Overall, there was a downward shift in perceptions of the reliability of Wellington public transport in 2007, compared with 2006.

One in seven (14%) users of public transport state that a major reason for using public transport is that 'public transport is reliable'. This percentage is slightly but not significantly lower than in 2006 (15%), after a significant increase in 2006 when compared with the results of 2005 (9%).

However, for Light and Non-users (those who have not used public transport in three and 12 months respectively), a perceived lack of public transport reliability factors in the decision not to use public transport more frequently. Fourteen percent of respondents do not use public transport because they 'cannot rely on public transport to be on time' and 13 percent because they 'cannot rely on public transport to get me where I want to go'. The number of people giving these responses has increased slightly but not significantly since 2006 (from 12% and 11% respectively).

The average 'reliability' rating (out of five) for Wellington buses decreased significantly from 3.7 in 2006 to 3.5 in 2007. Only users who had used buses in the preceding three months were asked to rate the services. The rating for 'buses run on time' also decreased slightly in this period from 3.3 to 3.2, though this change does not reach the level of significance.

The 2007 findings also show a significant decrease in the average rating for train reliability, from 3.5 in 2006 to 3.3. The rating for 'trains run on time' decreased slightly but not significantly, from 3.4 in 2006 to 3.3 in 2007. Again, only users in the previous three months were asked for these ratings.

Overall, in terms of reliability, TRI*M results show that Wellington public transport is performing at an average level. However there is still room for improvement as these attributes have high rated importance and a high impact on customer retention for both bus and train customers.

Convenience

Wellington residents' perception of public transport services as convenient is less positive in 2007 than in previous years.

Convenience is a significantly less important factor in encouraging Wellingtonians to use public transport. Just eight percent of public transport users rated 'convenience' as a main reason for using public transport, down from 22 percent in 2006.

There was also a significant increase in the number of Light Users whose stated reason for not using public transport more frequently was 'doesn't go where I want it to go' (from 5% in 2006, to 15% in 2007). This change is echoed in the number of respondents stating their main reason for not using public transport is because the 'times don't suit'. One in five (19%) gave this reason, up from 11 percent in 2006.

Friendliness

Wellingtonians' perception of the friendliness of bus and train staff is positive in 2007, with train staff rating higher than bus drivers.

The rating for 'friendliness and helpfulness of the bus driver' is fairly consistent over the duration of the monitor since 2003. In 2007, Wellington residents' average rating was 3.5 out of five, the same as in 2006.

The overall rating for 'friendliness and helpfulness of train drivers' was 3.8 in 2007, unchanged from previous years. This rating contributed to a TRI*M performance evaluation of 'far above average' for this attribute.

Simplicity

The simplicity of Wellington's public transport services generally scored well in 2007, with information about delays a key area for improvement.

When asked how 'easy it is to make journeys across the Wellington region by public transport', just over half (53%) consider it to be 'easy' or 'very easy', consistent with previous years. A slightly higher proportion (58%) thought it would be 'very easy' or 'extremely easy to get information about public transport' if they needed it, a slight positive shift from 2006 (up from 56%).

For bus passengers, the average rating for 'bus information is simple and easy to use' remains constant on 3.8, with the same average rating emerging for the corresponding statement for train passengers. Integration between bus and train service also scored well for bus and train passengers, with an unchanged average rating of 3.4 for both groups.

While there are high ratings for general public transport information, respondents are less satisfied with their ability to find information about delays. The performance of this attribute was judged to be 'far below average' for both bus and train users. Improving performance in this area should be a high priority, as TRI*M findings indicate it has a high stated importance and can have a large impact on customer retention.

Quality

While the overall 'quality' of Wellington's public transport services was not directly measured in this survey, attributes that could be associated with a quality experience were rated for performance.

In terms of cleanliness, both buses and trains received an average rating of 3.6 out of five in 2007, similar to 2006. The comfort of facilities when waiting for the bus also received a high rating (3.7), although average rating for the comfort of facilities when waiting for the train was lower at 2.9 out of five. Again these findings are unchanged from 2006.

1.3 Key Findings

Market Share

- The proportion of Wellington residents who have used public transport in the three months prior to the survey has decreased significantly compared to 2006, from 75 percent to 69 percent. This percentage is lower than in all previous years of the survey excluding 2003.
- One third (33%) of Wellington residents in 2007 are Regular Users of Public transport (i.e. they have used public transport two to four days a week or more in the last three months). This figure is slightly but not significantly lower than 2006 and 2005 (both 37%), and similar to the two earliest years of the survey in 2003 and 2004.
- Just over a third (35%) of Wellington residents are Occasional Users (i.e. have used in last three months but less than 2 times a week) of public transport in 2006, slightly but not significantly more than in 2006 (38%).

Transport Usage

- Over half of Wellington residents (57%) use a car as their *main* form of transport to get around the Wellington region, similar to previous years.
- Just over a quarter of Wellington residents (26%) use buses and trains as their main form of transport, also similar to previous years.
- As in previous years, cost-saving benefits were a key driver for public transport use in 2007 and the most popular reason for using public transport in 2007 was because it was 'cheaper than car/taxi' (29%).
- Other popular reasons for using public transport in 2006 were because 'parking is too expensive' (23%) and it is 'hard to find a park' (20%), both slightly but not significantly higher than in 2006 (20% and 17% respectively).
- There was a significant decrease in the number of people choosing to use public transport because it is convenient (from 22% in 2006 to 8% in 2007).

Customer Satisfaction

- Customer satisfaction with public transport services in the Wellington region is high overall, with 93 percent of Wellington residents rating the service 'fair', 'good', 'very good' or 'excellent' (94% in 2006).
- A high percentage of people (89%) would recommend public transport services in the Wellington region to others. Nearly all Wellingtonians (93%) would use public transport in Wellington in the future, and 87 percent consider public transport useful.
- Around two thirds (66%) of people consider the public transport system in Wellington to be highly regarded. This is significantly more than in 2003 (58%) and similar to all subsequent years.
- Just under half of Wellington residents (48%) rate the Wellington's public transport services favourably compared to Auckland. About one in five people view public transport in Wellington more favourably than Christchurch (21%) and Australian cities (23%).
- While overall satisfaction with public transport services is relatively stable, satisfaction with bus services is significantly lower in 2007, with an average rating of 3.4 out of five (compared with 3.6 in 2006). This measure has declined in small increments since surveying began in 2003 (4.0).
- Satisfaction ratings for train service attributes are generally lower than for corresponding bus attributes. The overall average rating for train services is 3.4, slightly but not significantly lower than in 2006 (3.5).
- Key attributes found to drive both customer satisfaction and impact on customer retention in 2007 include 'frequency of the service', 'reliability of the service', and 'services that arrive and leave on time'. TRI*M grid analysis shows that customers generally require improvements to be made in both bus and train services in these areas.
- TRI*M grid analysis among train users identified 'information about delays is easy to get' and 'having real time electronic information at stations to tell you when the next train is due' as priorities for improvement. 'Having real time electronic information at stations' was previously identified as having low impact on customer retention, but has become high impact in the 2007 findings.
- The overall TRI*M index score for public transport in the Wellington region has decreased three points to 67. This is a drop that is at the lower boundary of what is considered a significant change. An index score of 67 means that public transport users in the Wellington region are considered to be 'possibly vulnerable'.

- Customer satisfaction typology analysis found that 37 percent of respondents are both satisfied with and loyal to public transport services in the Wellington region ('Advocates'). This group has decreased significantly since 2006 (42%), continuing a trend from previous years. Just under a third (32%) are satisfied with public transport services, but not loyal – that is, they are likely to switch if alternative options are available to them ('Unconvinced'). This group is significantly larger than in previous surveys. Seventeen percent of Wellingtonians are classified as Detractors, neither satisfied with nor loyal to public transport. Positively, this group is slightly smaller than in 2006 (20%).

Communications

- Information on public transport services is seen as 'easy' to obtain by just under three in five Wellington residents (58%), similar to previous years. The main source of information for public transport information is the internet (54%), with significantly fewer respondents using the Metlink call centre (29% in 2007, compared with 42% in 2006).
- One in five respondents were able to provide the name 'Metlink' without prompt, and three quarters (75%) of the remainder said they had heard of the brand when prompted. However there remains a lack of clear understanding around what Metlink is and how it relates to Wellington's transport system.
- One in three (28%) respondents aware of Metlink thought it had made using public transport easier, though around half (47%) disagreed and a quarter (25%) were unsure.
- The Metlink website has been visited by just under a third (31%) of Wellingtonians, significantly more than in 2006 (21%). Six out of ten who had visited the website (60%) said the site was either 'excellent' or 'good' for getting information about buses and trains.
- One in ten people (11%) have telephoned Metlink in the last three months. A high proportion of people who have contacted Metlink were either 'very satisfied' or 'satisfied' with all aspects of the service they received. In particular, over four fifths said the person was polite and professional (87%), could answer all questions (84%) and gave the correct information (81%).

Commitment to Public Transport Usage

- Seventeen percent of Wellingtonians are committed to using public transport services in the Wellington region in 2007 and are highly unlikely to discontinue using public transport in the foreseeable future. However, this segment has decreased significantly from 21 percent in 2006.

- The proportion of Wellingtonians who are uncommitted to public transport is similar to 2006 at 55 percent. This group is vulnerable to discontinuing using public transport and would actively consider alternatives.
- One in six respondents are open to using public transport but do not currently do so (15% in 2006).
- There has been a significant increase in the proportion of residents who are unavailable to public transport services i.e. they are non-users who are, for the most part, against using public transport. Fourteen percent make up this segment in 2007, up from ten percent in 2006.

1.4 Conclusions

While this report presents some very positive findings in many areas, 2007 sees a downward shift in a number of key indicators. Some ratings for buses have dropped to levels consistent with train services, following a number of disruptions.

It is perhaps not surprising that satisfaction with public transport has declined given the delays and disruptions that have plagued the train and bus service on several occasions in late 2006 and in 2007. For example, the disruptions caused by the prolonged train staff work-to-rule in late 2006 will not be easily forgotten and were expected to affect the satisfaction ratings for this year's survey. It is therefore imperative that the results should be interpreted within the context of events outside the control of Greater Wellington.

Looking to the future, the research has identified areas where improvements are likely to not only increase satisfaction among users, but also attract new users. The TRI*M grid analysis reveals that both bus and train services are perceived to be underperforming in the following key areas, both of which have been reported in previous surveys:

- The frequency and reliability of the services.
- That services arrive and leave on time.

Responses from train customers also suggest that real time information at train stations has become highly important for customer satisfaction.

These changes are particularly important for targeting the 55 percent of respondents who are uncommitted to public transport according to Conversion Model results. A further 15 percent are open to public transport, but are not currently users, and these respondents should also be targets for new initiatives.