Customer Satisfaction Monitoring Of Auckland Public Transport Services

Main Report

Report for June 2017 – June 2018

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For: Auckland Transport

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Contents

1. Executive Summary

This report is the Annual Main Report for the year ended June 2018 and provides a summary of the results overall as well as by mode (bus/train/ferry). Comparisons to time series data collected overall and by mode are provided to illustrate how each is performing over time.

1.1 Customer Satisfaction

Overall 91.0% of respondents were satisfied with the overall service offered this year (up significantly from 89.7% last year), including 68.6% indicating they were *very satisfied* with the overall service they received (on par with last year, 67.6% *very satisfied*). This year train passengers were the most satisfied with the service they receive (92.4%, on par with last year 92.9%) followed by bus passengers (90.7%, up significantly from 88.6%), and ferry passengers (89.2%, down significantly from 91.1%).

Table 1.1: Overall Customer Satisfaction with Service

	Negative *(Rating 0-4)*	**Neutral** *(Rating 5)*	**Satisfied** *(Rating 6-7)*	**Very Satisfied** *(Rating 8-10)*
Total	**3.8%**	**5.2%**	**22.4%**	**68.6%**
Train	3.0%	4.5%	20.7%	71.7%
Bus	3.9%	5.5%	22.7%	68.0%
Ferry	5.3%	5.5%	24.6%	64.6%

Base: All respondents in the year to June '18, excluding don't know and blank responses.

In terms of ratings for the aspects of the service overall, respondents reported the highest satisfaction levels with **the vehicle** they were on (93.8% at least satisfied) and **the stop/station/wharf** where they boarded (88.7%), while satisfaction levels were lowest for the **public transport system overall** (74.2% satisfied to some extent).

A similar pattern is also seen in overall ratings across all three modes – with the highest share of positive ratings given for the vehicle and the stop/station/wharf, and the lowest ratings for the public transport system overall.

Table 1.2: Overall Passenger Satisfaction across Service Attributes – Proportion of Positive Responses

Service Attribute	Total	Train	Bus	Ferry
Vehicle	**93.8%**	95.3%	93.6%	91.1%
Customer Satisfaction	**91.0%**	92.4%	90.7%	89.2%
Stop/Station/Wharf	**88.7%**	93.5%	87.4%	86.7%
Information Available	**80.5%**	83.1%	79.4%	83.6%
Value for money	**80.0%**	80.1%	80.8%	71.0%
Public Transport System Overall	**74.2%**	77.4%	74.5%	58.7%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

1.2 Likelihood of Recommending a Similar Trip

The Net Promotor Score (NPS) Calculation was used to group the respondents' scores by their likelihood of promoting the trip to others in order to gauge the loyalty of the respondents rather than by direct satisfaction.

Across all services, respondents are almost twice as likely to be Promoters (40.1%) than Detractors (21.3%), giving a positive NPS of +18.8%. When compared with last year, the NPS is stable, with no significant change in the share of promotors, detractors and those passively satisfied.

Net promoter scores vary greatly by mode, with bus having experienced a significant increase in the NPS, while ferry and train have experienced significant decreases:

- Bus NPS up from +12.4%, to +14.8%;
- Ferry NPS down from +42.1%, to +35.5%; and
- Train NPS down from +30.9%, to +26.3%.

1.3 GAP Analysis

The Gap analysis identifies focus areas for each mode (attributes that are of high importance, but are currently under-performing) where improvements in performance of these attributes will have the biggest impact on improving the overall satisfaction rating.

- For the train, five attributes, including value for money, information overall, journey time, punctuality and the convenience of paying for the trip fall in the high importance/low performance category.
- For the bus four attributes, including value for money, journey time, punctuality, and the PT system fall within the high importance/low performance category.
- For the ferry only three attributes - value for money, punctuality and information available overall - fall in the high importance/low performance category.
  Note: all attributes for each mode were also in this category in the year to June '17.

1.4 Brand Awareness and AT HOP Card Ownership

Since year ended June 2014, the proportion of all respondents who own an AT HOP Card has increased significantly year on year, from 85.8%, to 88.9%, to 90.9%, and 94.2% this year.

An additional 2.3% of all respondents indicated that they intend to get a HOP Card, while around four percent of respondents either don't have one and have no intention of getting one (2.4%) or don't know what the HOP Card is (1.1%). *Note: shares of all of these have declined over time as ownership has increased.*

Although AT HOP card ownership overall is high, it varies by mode from 95.8% of all train passengers surveyed this year, down to 88.0% of ferry respondents. HOP card ownership for those surveyed on all modes has increased significantly when compared with last year (bus up from 91.1% to 94.3%, ferry up from 82.7% to 88.0%, and train up from 93.2% to 95.8% ownership).

1.5 Travel Behaviour

Frequency of Trip

Just less than two-thirds of respondents (64.2%) reported making the trip five days or more per week, while 23.0% make the trip between two and four times a week (up significantly from 21.3% last year). In contrast, 7.8% (up significantly from 6.2 last year) make the trip between monthly and weekly, while 5.0% (down significantly from 9.1% last year) make the trip less than monthly, including for the first time on the day of the survey.

The share who make the trip five days or more per week is similar for both those surveyed on the bus (64.7%) and train (63.8%), while only 60.8% of ferry users make the trip this frequently.

Purpose of Trip

Travelling to/from work is the most common reason for making the trip overall (56.6%, up significantly from 54.3% last year) as well as across the three modes (ferry 73.3%; train 60.6%; bus 53.8%). When compared to last year, the share travelling for work purposes has increased significantly across all modes.

Around one in five of all respondents are travelling to access tertiary education, while 10.4% (down significantly from 11.8% last year) are travelling for entertainment/socialising/sightseeing reasons. Travelling to tertiary education and for entertainment/socialising/sightseeing reasons are second and third most common reasons across all modes and travelling for entertainment/socialising/ sightseeing reasons has decreased significantly for both bus and ferry when compared to last year.

Reason for using PT to Make Trip

Parking being too hard to find or too expensive (33.8%, up significantly from 30.5% last year), being either more convenient/easier (19.0) or quicker (9.4%) than private alternatives, and avoiding congestion (9.3%, up significantly from 7.7%) are the most frequently mentioned reasons given by all respondents.

The top two most commonly mentioned reasons – parking and convenience - are the same across all modes.

1.6 Suggestions For Improvement

Most frequently mentioned suggestions made across all respondents include:

- Increase frequency of services (25.9%);
- Cheaper/more affordable fares (14.1%, down significantly from 16.2% last year);
- Improved punctuality and reliability of services (13.4%); and
- Better route service coverage (11.0%, up significantly from 9.9%).

These were also the most frequently mentioned suggestions made last year and are also commonly mentioned across all three modes (with the exception of ferry users also calling for extended hours of operation).

2. Introduction and Methodology

Public transport customer satisfaction surveys have been carried out in Auckland since 2005 and commissioned by Auckland Transport from 2010. At the end of each survey, findings are reported to the appropriate Auckland Transport departments to aid in decision making processes with regard to strategies aimed at improving the level of customer satisfaction with the Auckland public transport system.

The surveys aim to evaluate the performance of public transport services over the entire Auckland public transport network. Prior to August 2014 the surveys were carried out bi-annually, and then quarterly between August 2014 and June 2018. This report presents results on a yearly basis beginning in year ended June 2014.

Survey data is analysed and used to evaluate the level of customer satisfaction. The surveys compare the performance of modes and operators and identify areas for improvement. The research informs annual reporting, public transport key performance indicators and contract management with public transport operators.

There are a collection of reports analysing the year ended June 2018 dataset:

- Annual Main Report – analysing the year ended June 2018 results across all three modes;
- Annual Rail Report – analysing the year ended June 2018 results from surveys carried out on the rail network only; and
- Thirteen Operator Reports – analysing the year ended June 2018 results from surveys carried out for specific operators.

This report is the **Annual Main Report** for year ended June 2018 dataset and provides a summary of the results in total and across all three modes.

2.1 Survey Methodology

In order to collect the information efficiently, Gravitas conducted on-board surveys with passengers, using self-completion forms (refer to Appendix 1). They key advantage of this method is that users of the service can be surveyed while they are actually using the service, giving a better indication of specific attributes of the service such as vehicle or station quality.

The questionnaire for the survey uses an 11-point scale from 0-10 (refer to Appendix 1). The relevance of each question is reviewed after each survey wave.

Responses have been grouped using parameters to illustrate the overall satisfaction level. These parameters translate the scores on the 11-point scale into the following categories:

Table 2.1: Satisfaction Parameters

Score (out of 10)	Satisfaction Level
Greater than or equal to 8	Very Satisfied*
Greater than or equal to 6	Positive
Equal to 5	Neutral
Less than or equal to 4	Negative

** Note this is a subset of positive*

The questions covered a broad range of data including:

- How customers rated key services attributes (such as timeliness and affordability) of their trip;
- The overall public transport system;
- Why and how often customers use the public transport system; and
- General information about the passengers.

2.2 Sample Frame, Size and Selection

The population sampled was all users of public transport (train, bus and ferry) in the Auckland region, aged 15 years or over. During the peak periods, every second passenger was approached, while during the off-peak periods every passenger was approached. This is done to achieve an even spread of survey responses across the day and ensure the results are not dominated by the response of peak-period customers.

Note: Prior to March 2017, ferry passengers were only surveyed twice in a twelve month period (in May and November). However, from March 2017 onwards they are surveyed quarterly.

The table below shows the sample sizes and associated margins of error by mode, operator and rail line for surveys undertaken in the year to June 2018.

Table 2.2: Survey Sample Size by Mode, Operator and Rail Line

Mode	Survey Sample Size	Collected Surveys Margin of Error
Total	**10,662**	**+/- 1.0%**
Mode		
Train	2128	+/- 2.1%
Ferry	2729	+/- 1.9%
Bus	5805	+/- 1.3%
Operator		
Transdev	2128	+/- 2.1%
NZ Bus	1807	+/- 2.3%
Ritchie's	1091	+/- 3.0%
Birkenhead Transport	541	+/- 4.2%
Howick & Eastern	676	+/- 3.8%
Pavlovich Coachlines	503	+/- 4.4%
SkyBus/AirBus	157	+/- 7.8 %
Waiheke Bus Company	138	+/- 8.3%
Go Bus Transport	657	+/- 3.8%
Ritchies Murphy Transport Solutions	235	+/- 6.4%
Fullers	1896	+/- 2.3%
SeaLink (Pine Harbour)	250	+/- 6.2%
Belaire	220	+/- 6.6%
360 Discovery	363	+/- 5.1%
Rail Line		
West Line	602	+/- 4.0%
South Line	447	+/- 4.6%
Onehunga Line	279	+/- 5.9%
Manukau Line	800	+/- 3.5%

2.3 A Note on Network Patronage and Weighting

Since the October 2012 survey, “total” results (totalling all three modes) are weighted according to the proportion that each mode contributes to the total patronage on the public transport network. Weighting the data analysis recognises the fact that the proportion of total patronage across each mode is significantly different, i.e. the vast majority of public transport trips in Auckland are via bus.

Throughout this report, all “Total” results and total base sizes reported are weighted, results by mode (bus/train/ferry) and any operator results are unweighted.

3. Overall Customer Satisfaction

Customer satisfaction is the key performance indicator (KPI) of the performance of the public transport services in Auckland. This section analyses customer satisfaction across all modes, operators and network groups. It should be noted that, prior to June 2014, surveys were reported bi-annually, between June 2014 to June 2015 surveys were reported quarterly while, from June 2016, the survey was reported annually. This report shows results across time in periods of years from the year ended June 2014 to the current year ended June 2018.

3.1 Overall Customer Satisfaction

Overall Satisfaction

Figure 3.1 illustrates the level of customer satisfaction across all three modes of public transport in Auckland.

- Overall, slightly more than nine out of ten respondents across all three modes (91.0%) are satisfied to some extent with the service received, including more than two thirds (68.6%) who are *very satisfied*. When compared with last year, this represents a significant increase in the share at least satisfied (up from 89.7%). The share *very satisfied* is stable.
- Consistent with last year train passengers are the most satisfied with the service they receive (92.4%), including 71.7% who are *very satisfied.*
- When compared with results from last year, bus satisfaction has increased significantly to surpass ferry ratings – including significant increased in both the share at least satisfied (up from 89.2% last year, to 90.7% this year) and the share *very satisfied* (up from 65.5%, to 68.0%).
- In contrast, Ferry satisfaction has decreased significantly from last year - with total positive ratings down from 91.1%, to 89.2% and *very satisfied* ratings down from 69.6% to 64.6%.

Figure 3.1: Overall Customer Satisfaction

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year

Key Attributes

Table 3.1 illustrates the proportion of positive responses for the key services attributes across all three modes of public transport.

- Personal safety during the trip is the attribute that received the highest share of positive ratings across all three modes.
- When compared with last year, buses have seen a significant increase in positive ratings for all of the key service attributes. The most notable increase in positive ratings has been for services arriving and departing on time (up from 77.0%, to 80.7%) and continuing a year-on-year upwards trend for this rating, up from 67.9% in the year to June '15.
- Train services have seen a significant decrease in positive ratings for two out of the six key service measures. The most notable decrease this measure was positive ratings for services arriving and departing on time. After significant increases year-on-year between 2015 and 2017, ratings are down significantly from 90.9% last year, to 87.6%. Positive ratings for staff friendliness/helpfulness are also down significantly (down from 94.2% last year, to 92.5%).
- This year ferry services have seen a significant decrease in the share at least satisfied with the value for money of the trip (down from 74.8% last year, to 71.0%). Positive ratings for services arriving and departing on time are stable compared to last year at 84.0%, after year-on-year decreases between 2015 and 2017. All other measures also remain stable.

Table 3.1: Key Service Attributes by Mode – Proportion of Positive Responses

	Train					Bus					Ferry				
	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr
Personal Safety during the trip	89.0%	89.6%	**93.2%**	**95.0%**	95.2%	92.0%	92.4%	91.7%	92.7%	**94.4%**	96.9%	96.4%	**97.9%**	97.9%	97.6%
Staff friendliness / helpfulness	86.4%	88.0%	**90.8%**	**94.2%**	**92.5%**	85.3%	86.9%	87.3%	**89.0%**	**90.6%**	96.2%	95.9%	96.2%	96.2%	96.0%
Convenience of paying for your trip	76.5%	**85.6%**	86.7%	**90.3%**	90.4%	86.0%	**88.5%**	87.7%	**89.7%**	**91.5%**	86.4%	88.1%	**91.0%**	90.8%	89.7%
Time taken for a journey	73.0%	**78.5%**	**83.3%**	**89.0%**	88.5%	77.4%	79.0%	79.5%	**83.4%**	**85.1%**	94.4%	93.4%	93.1%	92.4%	92.3%
Services arriving and departing on time	66.8%	**71.1%**	**79.7%**	**90.9%**	**87.6%**	68.1%	67.9%	**72.4%**	**77.0%**	**80.7%**	95.4%	**90.2%**	**87.2%**	**84.4%**	84.0%
The value for money of this trip	64.4%	**70.0%**	72.8%	**81.2%**	80.1%	66.6%	**69.9%**	**66.8%**	**79.2%**	**80.8%**	68.5%	67.2%	70.0%	**74.8%**	**71.0%**

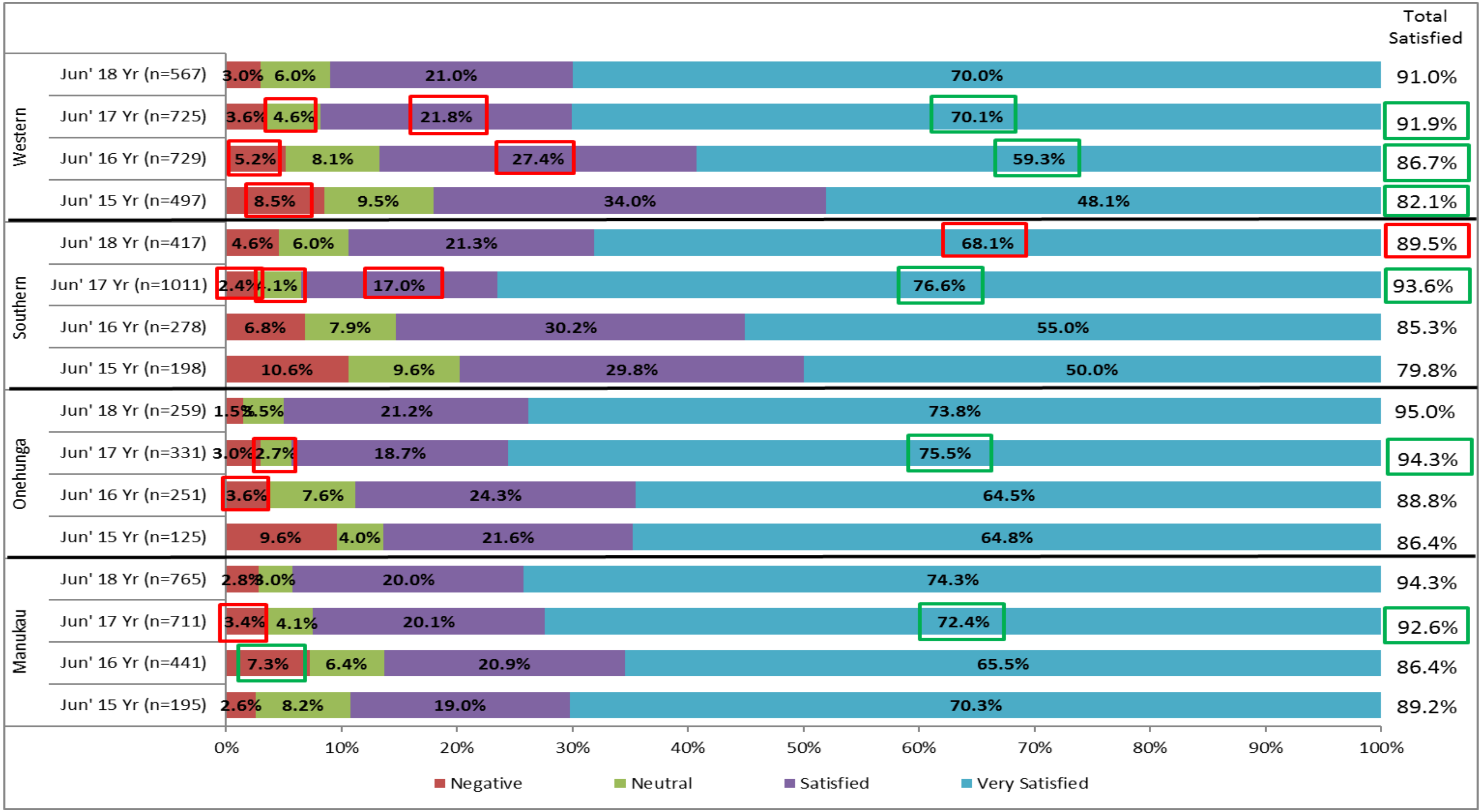
Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

3.2 Customer Satisfaction by Rail Line

Figure 3.2 illustrates the level of customer satisfaction for trains by rail line.

- Positive ratings for the service overall is high across all rail lines and range from 95.0% at least satisfied among those surveyed on the Onehunga Line, 94.3% on the Manukau line, and 91.0% on the Western line, down to 89.5% on the Southern Line.
- The share of respondents satisfied to some extent as well as the share *very satisfied* is stable for all lines except the Southern, which has seen a significant decrease in the total positive rating (89.5%, down from 93.6%) and the share *very satisfied* (68.1%, down from 76.6%).

Figure 3.2: Customer Satisfaction by Rail Line



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

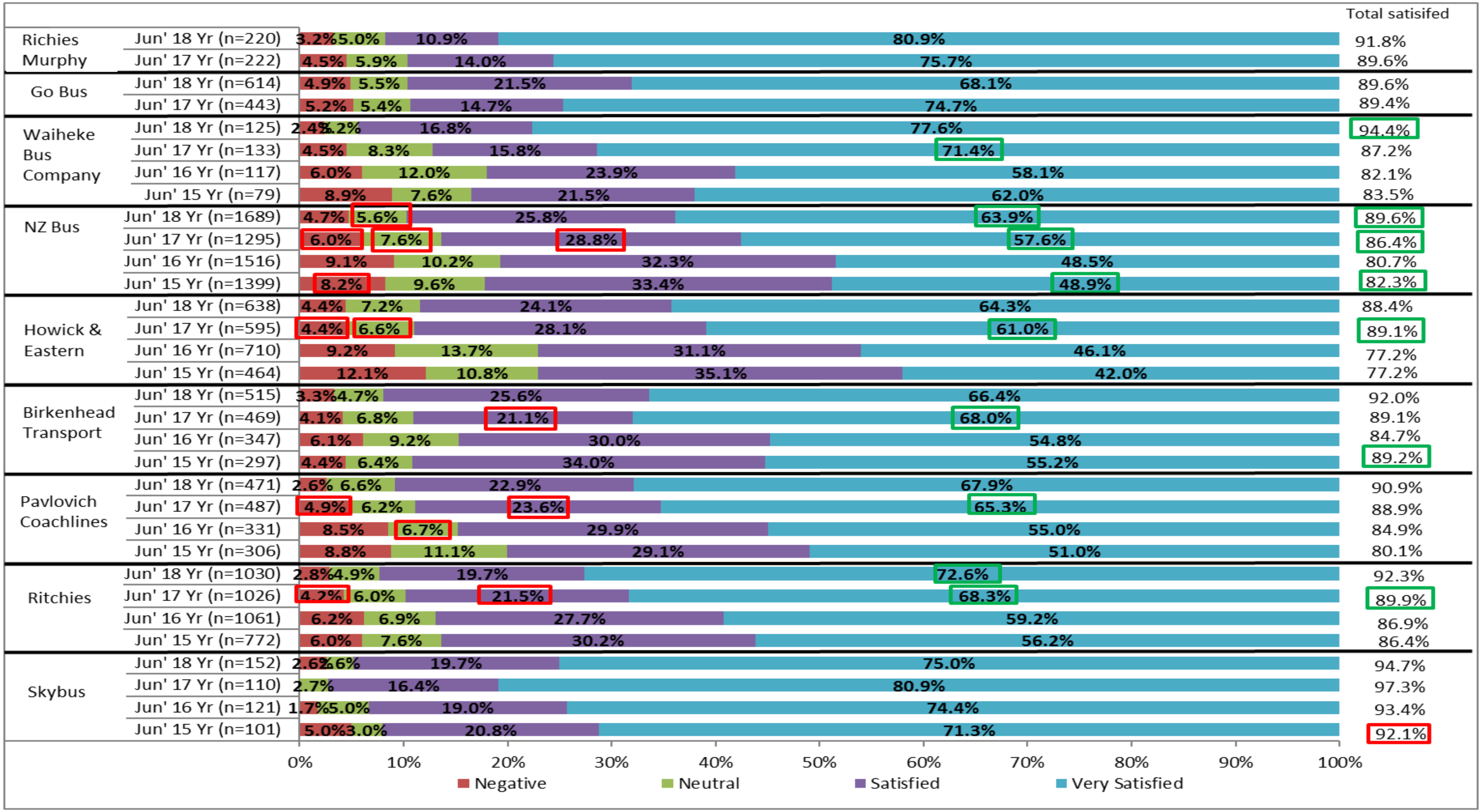
Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

3.3 Customer Satisfaction by Bus Operator

Figure 3.3 illustrates the level of customer satisfaction across the different bus operators.

- Positive ratings for the service overall ranges from 94.7% at least satisfied among those surveyed on the SkyBus service, down to 88.4% satisfied on Howick & Eastern services.
- When compared with last year there have been significant increases in the share of satisfied respondents travelling on both Waiheke Bus Company (up from 87.2%, to 94.4%) and NZ Bus services (up from 86.4%, to 89.6%).
- The share of respondents satisfied to some extent for all other bus operators is similar when compared with results for each operator last year.

Figure 3.3: Customer Satisfaction by Bus Operator



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

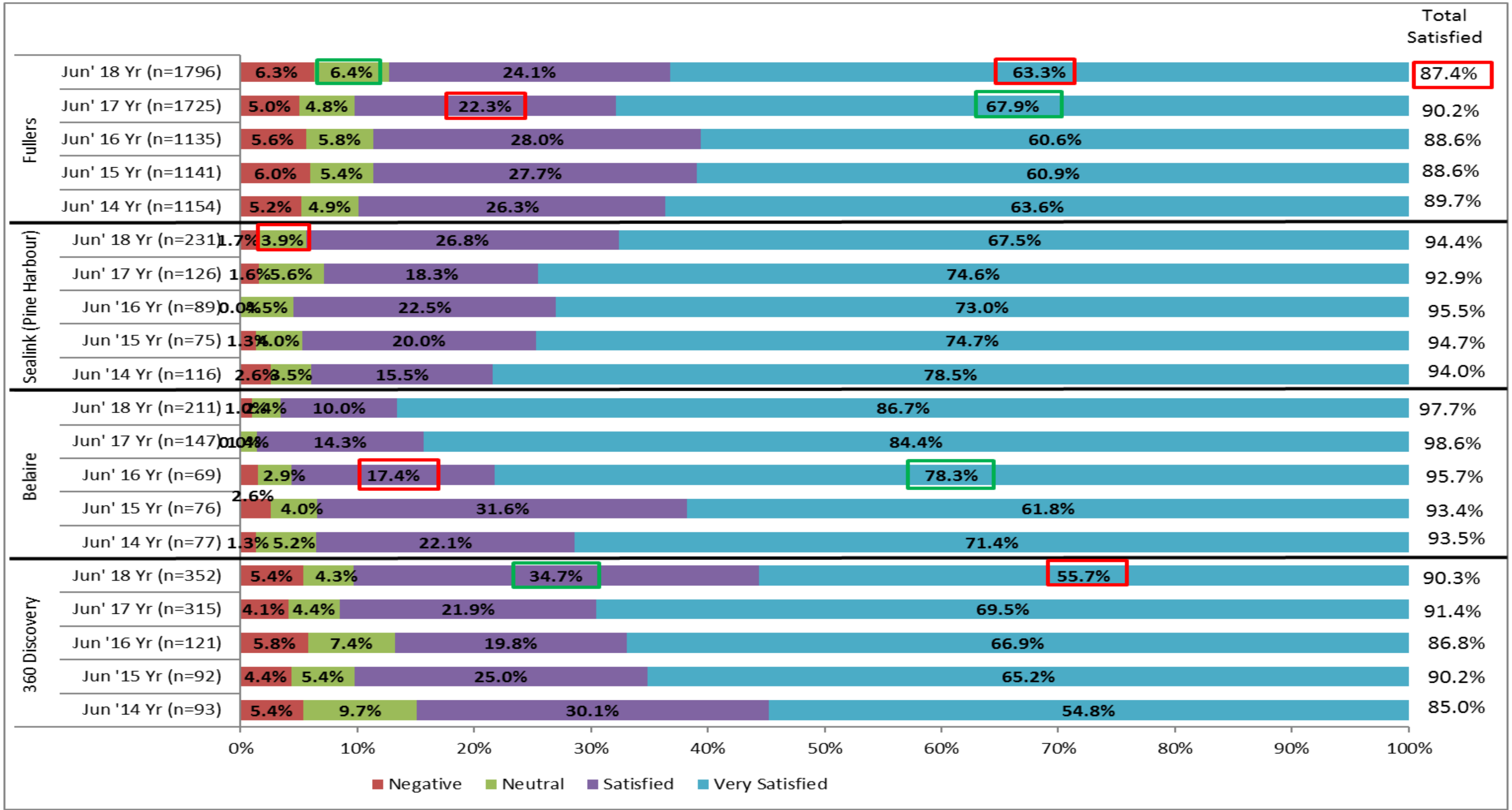
Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

3.4 Customer Satisfaction by Ferry Operator

Figure 3.4 illustrates the level of customer satisfaction across the different ferry operators.

- The share of ferry respondents at least satisfied with the service overall ranged from 97.7% among those surveyed on a Belaire service, down to 87.4% among Fullers passengers.
- When compared with last year, the share of Fullers respondents satisfied to some extent has declined significantly (down to 87.4%, from 90.2%). The share *very satisfied* among Fullers passengers has also declined significantly compared to last year (63.3%, down from 67.9%).
- The share of passengers *very satisfied* among 360 Discovery passengers has also significantly declined (55.7%, down from 69.5%).

Figure 3.4: Customer Satisfaction by Ferry Operator



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

4. Performance Ratings

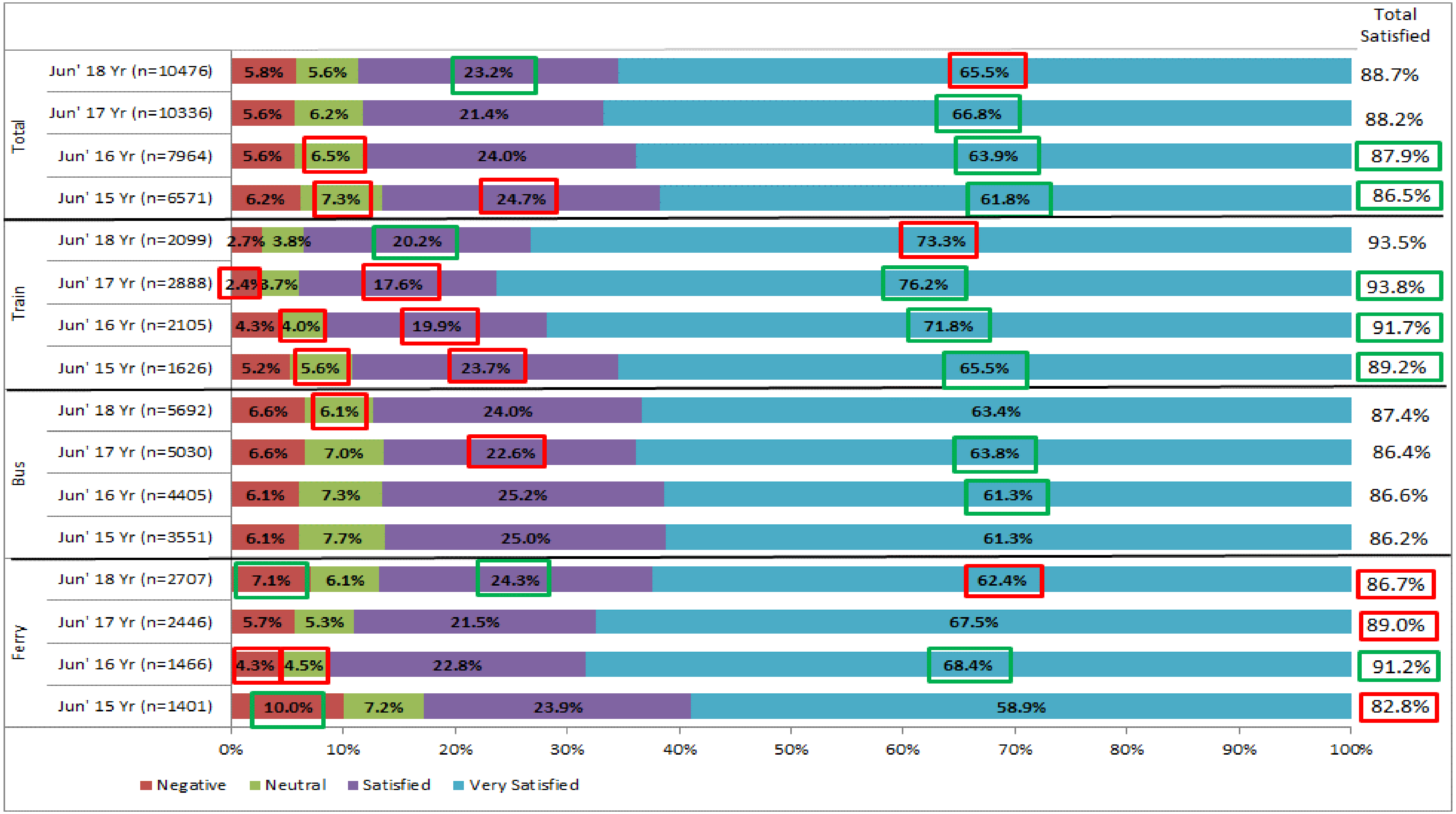
4.1 Station / Stop / Wharf

Overall Satisfaction with Station / Stop / Wharf

Figure 4.1 illustrates how satisfied passengers are with the station / stop / wharf where they boarded the train / bus / ferry they were surveyed on.

- Overall, 88.7% of respondents across all modes are satisfied with the station / stop / wharf where they boarded the service, including 65.5% who were *very satisfied*. When compared to last year this represents a significant decrease in *very satisfied* ratings (down from 66.8%) after an upward trend in *very satisfied* ratings between 2014 and 2017. The total positive rating is stable from last year.
- In the year to June 2018, positive ratings by mode range from 93.5% for train stations, to 87.4% for bus stops and 86.7% for ferry wharves.
- When compared with last year, ferry passengers are significantly less satisfied with the wharf where they boarded the vehicle - with the proportion of satisfied customers down from 89.0% last year, to 86.7% and the share of *very satisfied* respondents down from 67.5%, to 62.4%.
- Bus and train passengers have shown no significant change in total positive ratings for this aspect of service provision since last year, however the share train passengers stating they are *very satisfied* with the station where they boarded has decreased from 76.2% in the year, to June ’17, to 73.3%.

Figure 4.1: Overall Satisfaction with Station/Stop/Wharf



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

Station / Stop / Wharf Attribute Performance Ratings

Table 4.1 provides a comparison of the ratings for key attributes of the station / stop / wharf where respondents boarded the service they were surveyed on by mode.

- While the share of positive ratings varies by attribute and mode, ratings are generally lowest for the stop/station/wharf providing shelter from the weather and having enough seats available.
- Bus services have seen a significant increase in the positive rating for personal safety (up to 85.2%, from 83.6% in the year to June '17). Ratings for all other attributes for buses remain stable.
- After significant increases in positive ratings for enough seats being available for trains year-on-year between 2015 and 2017, there has been a significant decrease in the past year (down to 80.6%, down from 83.1%). Ratings for all other attributes for trains remain stable.
- Ferry services have seen a significant decrease in positive ratings for providing shelter from the weather for the second year running (down to 68.6%, from 74.9% in the year to June '17). Ratings for all other attributes for ferry services remain stable.

Table 4.1: Station/Stop/Wharf Attributes by Mode – Proportion of Positive Responses

	Train					Bus					Ferry				
	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr
Personal Safety	81.0%	82.2%	**86.4%**	88.3%	88.8%	84.0%	84.8%	84.9%	83.6%	**85.2%**	89.3%	88.9%	**94.3%**	**92.6%**	92.3%
Cleanliness	84.2%	**87.4%**	**91.2%**	91.7%	92.7%	80.4%	90.0%	82.4%	83.4%	84.3%	87.4%	**84.0%**	**89.5%**	88.7%	89.1%
Ease of Access	88.2%	89.1%	87.3%	87.9%	88.0%	88.8%	88.0%	**85.8%**	86.2%	86.3%	88.6%	87.3%	89.5%	90.1%	89.8%
Having enough seats available	70.4%	**73.7%**	**80.7%**	**83.1%**	**80.6%**	69.4%	71.3%	**74.0%**	**78.4%**	77.5%	70.8%	69.7%	**79.1%**	**76.0%**	74.3%
Providing shelter from the weather	70.2%	**73.7%**	**79.1%**	**84.0%**	84.2%	68.8%	68.5%	**71.3%**	70.2%	71.6%	66.9%	64.0%	**78.8%**	**74.9%**	**68.6%**
Overall Satisfaction with Station / Stop / Wharf	86.2%	**89.2%**	**91.7%**	**93.8%**	93.5%	85.6%	86.2%	86.6%	86.4%	87.4%	85.7%	**82.8%**	**91.2%**	**89.0%**	86.7%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

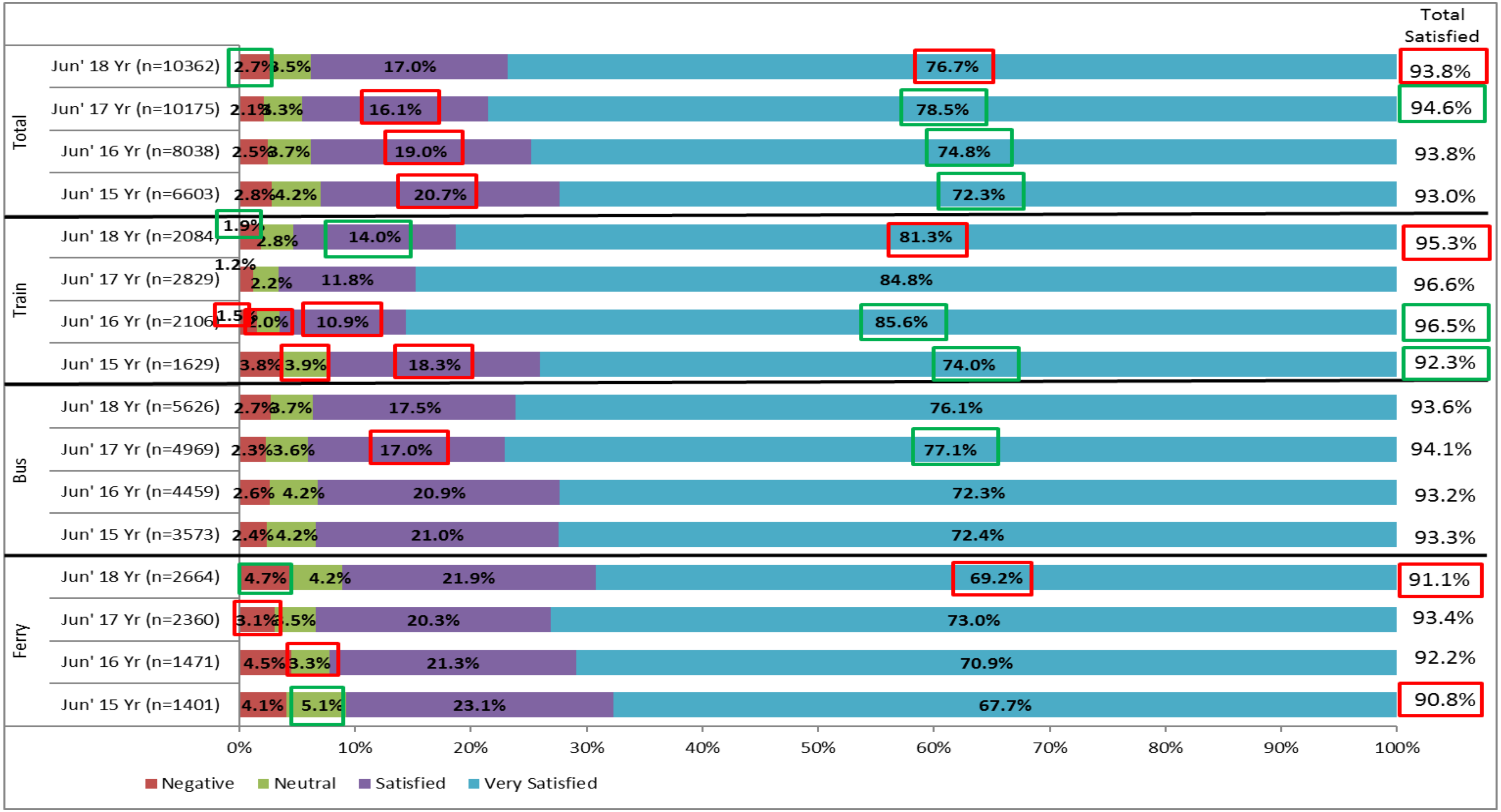
4.2 Vehicle

Overall Satisfaction with Vehicle

Figure 4.2 illustrates the overall satisfaction with the vehicle respondents were travelling on at the time of the survey.

- Overall, 93.8% of customers are satisfied with the vehicle they were travelling on (down significantly from 94.6% last year), including more than three quarters (76.7%) who are *very satisfied* (also down significantly from 78.5% last year).
- Vehicle satisfaction ratings are very positive across all modes, with more than nine out of ten respondents on each mode giving a positive rating. Train passengers tend to be the most satisfied with the vehicle they were travelling on (95.3%), followed by bus passengers (93.6%), and then ferry passengers (91.1%).
- Despite receiving the highest rating, positive ratings for train passengers are down significantly compared to last year (95.3%, compared to 96.6%). The share *very satisfied* is also down significantly to 81.3% (from 84.8% in the year to June ’17).
- Positive ratings for ferry passengers are down significantly compared to last year (91.1%, compared to 93.4%). The share *very satisfied* is also down significantly to 69.2% (from 73.0% the previous year).
- Positive ratings for bus passengers are consistent with last year, with no significant change in ratings.

Figure 4.2: Vehicle Satisfaction by Mode



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

Vehicle Attribute Performance Ratings

Table 4.2 provides a comparison of the ratings for key attributes of the vehicle respondents were travelling on when surveyed across all three modes.

- While still relatively high, ratings for almost all vehicle attributes, across all modes, have declined to some degree since last year.
- Once again, the train received the highest share of positive ratings for each of the individual attributes.
- Positive ratings for having enough seats available have declined significantly for all modes since last year, with the most notable decline being for ferry (down from 89.4%, to 85.1%).
- Positive rating for cleanliness outside the vehicle has declined to 92.0% (from 94.2% in 2107) for trains, which is the only mode rated for this attribute.
- There has been no significant change, for any mode, for ease of getting on and off, comfort and cleanliness inside the vehicle.

Table 4.2: Vehicle Attributes by Mode - Proportion of Positive Responses

	Train					Bus					Ferry				
	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr
Ease of getting on/off the vehicle	90.2%	**93.1%**	**95.2%**	95.9%	95.2%	93.7%	93.0%	92.3%	**93.4%**	93.2%	91.7%	**88.1%**	**90.7%**	89.5%	88.2%
Your comfort*	-	-	-	95.2%	94.4%	-	-	-	91.9%	91.5%	-	-	-	91.6%	90.5%
Cleanliness inside the vehicle	90.3%	91.3%	**95.1%**	94.6%	93.3%	92.2%	92.1%	92.3%	91.5%	91.8%	93.5%	**91.4%**	**94.1%**	92.8%	92.6%
Cleanliness outside the vehicle	85.7%	88.0%	**94.3%**	94.2%	**92.0%**	-	-	-	-	-	-	-	-	-	-
Having enough seats available	81.5%	**87.1%**	**92.4%**	93.3%	**90.3%**	88.2%	87.9%	87.8%	**91.1%**	**89.0%**	89.0%	89.3%	87.7%	89.4%	**85.1%**
Overall satisfaction with vehicle	89.9%	**92.3%**	**96.5%**	96.6%	**95.3%**	93.4%	93.3%	93.2%	94.1%	93.6%	92.9%	**90.9%**	92.2%	93.4%	**91.1%**

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.
**This attribute was added during the final quarter of 2016. Therefore time series data is not available.*

4.3 Information Available

Overall Satisfaction with Information Available about Trip

Figure 4.3 illustrates the level of customer satisfaction with the information available about the trip.

- Overall four in five respondents (80.5%) were at least satisfied with the availability of information about their trip, including 54.6% who were *very satisfied*. When compared with the year to June '17, this represents a significant increase in both at least satisfied (up from 78.0%) and *very satisfied* (up from 50.1%) ratings.
- Positive ratings for the availability of information were highest among those surveyed on ferries (83.6%), followed by trains (83.1%), and were lowest for those travelling by bus (79.4%).
- Despite having the lowest ratings, when compared with last year, there has been a significant increase in both the proportion of positive ratings (79.4%, up from 74.8%) and the proportion of *very satisfied* responses 53.5%, up from 46.5%) for buses.
- The share satisfied with the availability of information for trains has decreased significantly from 86.4% for the year to June '17 to 83.1% this year.
- Satisfaction with information for ferries is stable from last year.

Figure 4.3: Overall Satisfaction with Information Available about Trip

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

Information Available Performance Rating by Mode

Table 4.3 compares the performance ratings for the information attributes across each mode.

- Positive ratings for the information attributes vary considerably by individual attribute.
- Ratings for the information about routes and timetables have decreased significantly for the ferry (down from 89.1%, to 83.8%) and for the train (down from 86.5%, to 81.4%), after significant increases for both for the year to June '17.
- Positive ratings for information about delays and service disruptions increased significantly for the bus (up from 58.4% to 67.7%) and decreased significantly for the train (down from 75.5% to 72.8%), compared with the previous year.
- The attribute information about how to pay for your trip has remained stable from last year across all modes.

Table 4.3: Information Available Attributes by Mode – Proportion of Positive Responses

	Train					Bus					Ferry				
	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr
Information about how to pay for your trip*	-	-	-	89.0%	87.3%	-	-	-	81.1%	81.2%	-	-	-	84.7%	83.9%
Information about routes and timetables	75.5%	74.4%	**79.1%**	**86.5%**	**81.4%**	75.3%	75.8%	**73.4%**	**77.3%**	77.6%	69.3%	69.0%	71.0%	**89.1%**	**83.8%**
Information about delays and service disruptions	61.9%	61.6%	**67.0%**	**75.5%**	**72.8%**	54.8%	54.8%	**52.2%**	**58.4%**	**67.7%**	67.5%	64.6%	65.9%	**72.0%**	74.2%
Overall satisfaction with information available	78.6%	77.9%	**82.4%**	**86.4%**	**83.1%**	74.3%	73.2%	**69.7%**	**74.8%**	**79.4%**	74.0%	72.0%	**76.2%**	**83.9%**	83.6%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.
**This attribute was added during the final quarter of 2016. Therefore time series data is not available.*

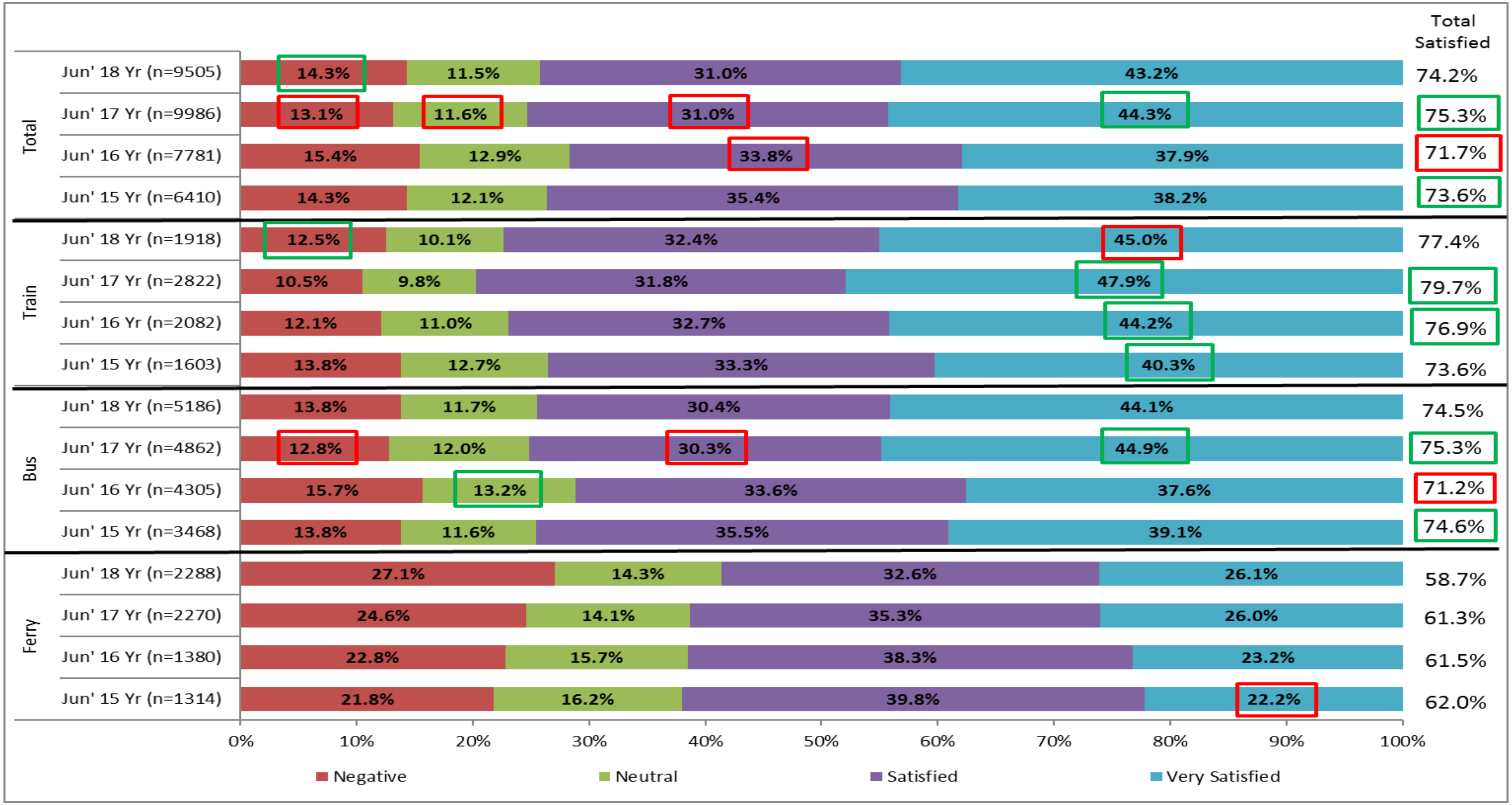
4.4 Public Transport System

Overall Satisfaction with Public Transport System

Figure 4.4 illustrates the level of customer satisfaction with the public transport system in Auckland overall by mode.

- Almost three quarters of all respondents were satisfied to some extent with the public transport system overall (74.2%, stable from the year to June '17), including 43.2% who are *very satisfied* (also stable from last year).
- Overall satisfaction with the public transport system were highest among train respondents (77.4%), followed by bus respondents (74.5%), and then those surveyed on a ferry service (58.7%).
- Total satisfaction ratings for each mode are stable from the previous year, however the share *very satisfied* among train respondents has decreased significantly (from 47.9% down to 45.0%).

Figure 4.4: Satisfaction with Public Transport System by Mode



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

Public Transport Attributes Performance Ratings

Table 4.4 compares the performance ratings for the individual public transport attributes across each mode.

- Positive ratings for the information attributes vary by individual attribute and mode, however train respondents give the highest share of positive ratings for four of the six individual public transport attributes.
- However, when compared with last year, the share of positive ratings given by train respondents across each of the attributes has decreased. Most decreases are only slight, with only how often services run showing a significant decline (down from 76.9% for the year to June ’17, to 74.0%).
- Bus has shown significant increases in positive ratings since last year for operating hours of service (76.1%, up from 73.4% last year) and route coverage (71.6%, up from 69.0% last year).
- Positive ratings for all individual attributes among ferry passengers remain stable form last year.

Table 4.4: Satisfaction with Public Transport System by Mode – Proportion of Positive Responses

	Train					Bus					Ferry				
	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr	Jun '14 Yr	Jun '15 Yr	Jun '16 Yr	Jun '17 Yr	Jun '18 Yr
Operating hours of services	69.8%	72.4%	**75.7%**	77.8%	77.2%	71.9%	72.1%	71.0%	**73.4%**	**76.1%**	62.1%	62.8%	61.8%	59.7%	57.7%
Directness of services	71.3%	72.7%	75.4%	**78.6%**	77.7%	74.2%	75.0%	**72.4%**	**75.4%**	76.3%	67.3%	**62.2%**	63.7%	64.9%	66.8%
Ease of transfer between modes	67.4%	**71.8%**	**74.9%**	77.1%	76.1%	70.4%	**72.9%**	71.8%	**75.9%**	76.2%	63.9%	63.4%	62.2%	62.2%	60.8%
Route coverage	71.0%	71.8%	73.8%	74.9%	73.4%	73.1%	73.7%	**71.4%**	**74.8%**	74.5%	63.6%	60.9%	61.3%	61.3%	61.6%
How often services run	66.5%	**70.0%**	**73.7%**	**76.9%**	**74.0%**	67.8%	68.5%	67.7%	69.0%	**71.6%**	60.1%	58.8%	58.5%	57.5%	55.1%
How complaints are handled and solved	64.1%	**69.1%**	71.8%	73.3%	72.7%	69.6%	71.1%	69.7%	69.2%	70.3%	75.9%	**69.8%**	72.3%	**50.7%**	52.1%
Overall satisfaction with the public transport system	72.2%	73.6%	**76.9%**	**79.7%**	77.4%	72.1%	**74.6%**	**71.2%**	**75.3%**	74.5%	65.4%	62.0%	61.5%	**61.3%**	**58.7%**

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

4.5 Value for Money of Using Public Transport

Value for Money

Table 4.5 compares the value for money ratings across the three modes of transport.

- Overall, four out of five (80.0%) of all respondents surveyed this year were satisfied with the value for money of the trip they were on, including 57.8% who were *very satisfied*. These results are stable from the previous year.
- This year, buses (80.8%) have surpassed trains (80.1%) for positive ratings for value for money. Positive ratings are lower for ferries (at 71.0%).
- The total positive rating for value for money for travelling on buses has increased significantly this year, from 79.2% last year to 80.1%.
- In contrast, positive ratings for ferries have declined significantly from 74.8% last year to 71.0%. The share *very satisfied* has also declined significantly (down from 47.0%, to 42.5% this year).
- The positive rating for trains is stable compared to last year.

Figure 4.5: Overall Value for Money of Trip

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

5. Customer Recommendations

Customers were asked how likely they were to recommend the trip to others wanting to make a similar trip.

5.1 Likelihood of Recommending Trips to Others

The Net Promoter Score (NPS) Calculator groups the respondents' scores into three promoter categories, in order to attempt to gauge the loyalty of the respondents (rather than direct satisfaction with the service).

The intention is to determine the likelihood of the respondent positively promoting their public transport trip to others.

Respondents are classified into the following sub categories:

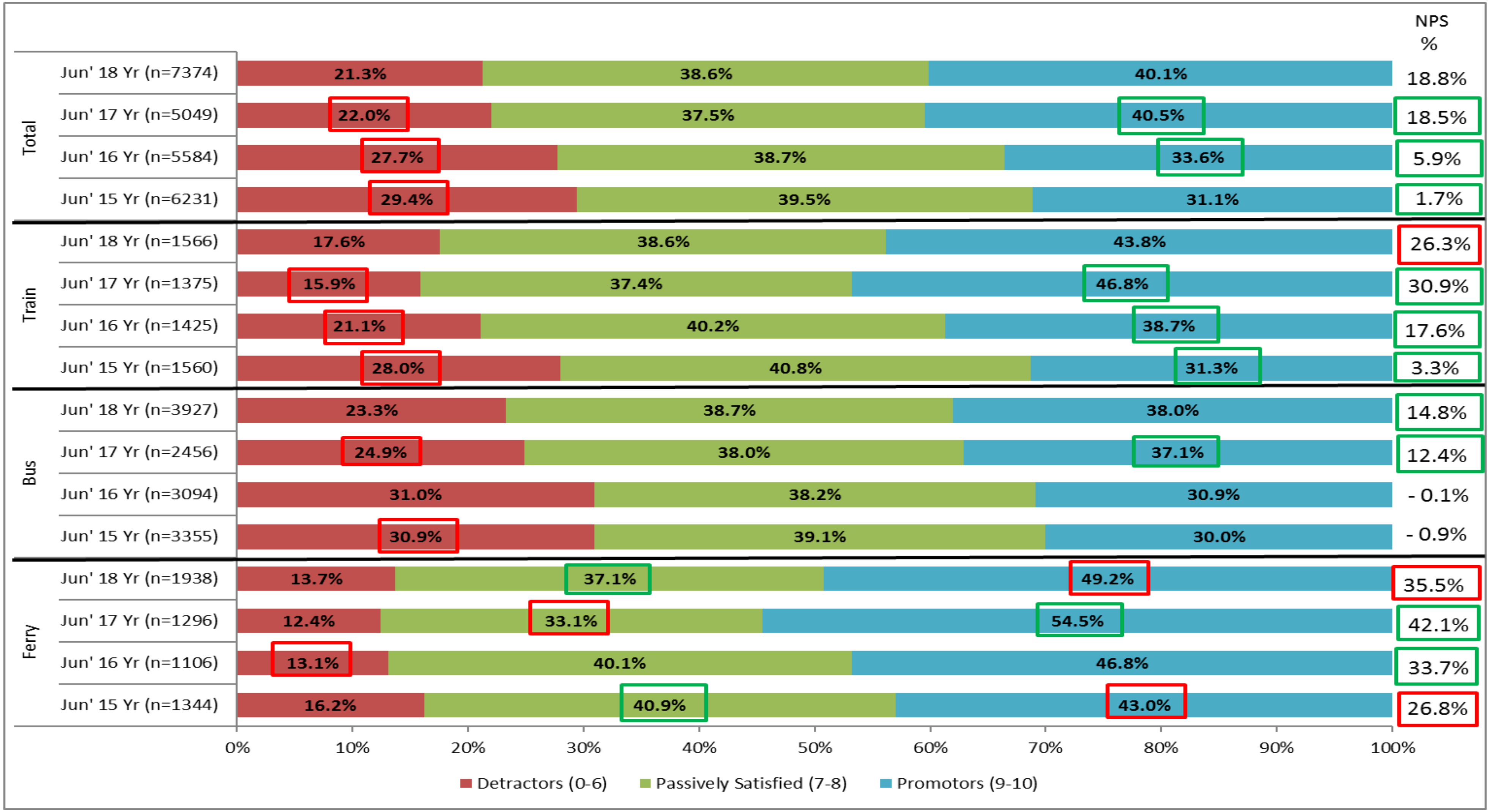
- Promoters (scoring 9-10) – Loyal Enthusiasts;
- Passively Satisfied (scoring 7-8) – Happy Respondents but unlikely to promote the service; and
- Detractors (scoring 0-6) – Unhappy Respondents.

The NPS calculator deducts the proportion of "Detractors" from the proportion of "Promoters" to estimate the level of respondent loyalty, with a value of -100% indicating all respondents are "Detractors" and +100% indicating that all respondents are "Promoters". Generally a value over 0% is good, with any values over 50% considered to be excellent.

Figure 5.1 shows how likely surveyed customers are to recommend their trip to others for respondents surveyed overall and on each mode for the most recent period and over time.

- Across all services, respondents are almost twice more likely to be Promoters (40.1%) than Detractors (21.3%), giving a positive NPS of +18.8%. When compared with last year, the NPS is stable after significant increases year-on-year between 2104 and 2017.
- Net Promoter Scores vary greatly by mode, ranging from +35.5% among respondents travelling by ferry, down to +14.8% for those travelling by bus.
- Despite having the highest score, ferries have experienced a significant decrease in NPS compared with last year (down from +42.1% in 2017, to +35.5% this year). This is due to a significant decrease in promotors and a significant increase in the share being passively satisfied, while the share of detractors has remained stable.
- Trains have also experienced a significant decrease in NPS from 2017, down to +26.3% from +30.9%.
- In contrast, buses have experienced a significant increase in NPS for the second year running, up from +12.4% for the year to June '17, to +14.8% this year.

Figure 5.1: Overall Likelihood of Recommending Trip to Others



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

6. Gap Analysis

6.1 Correlation of Service Attribute Performance Ratings

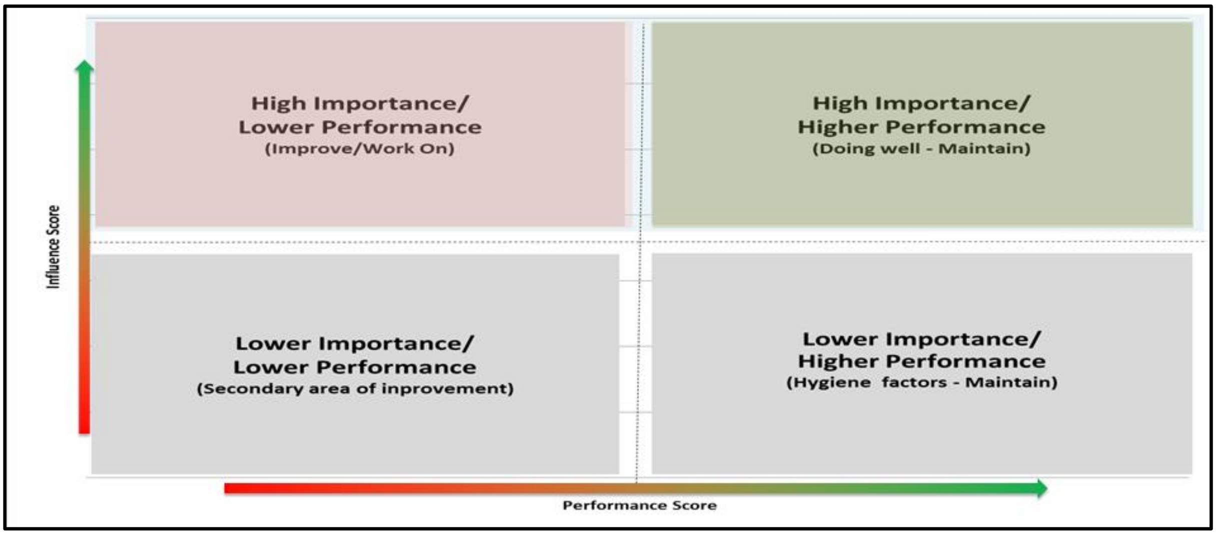
To establish the relative importance of each service attribute, statistical techniques (correlation and bi-variate analysis) have been applied to the data to establish the relationship of each service attribute to overall performance. This analysis provides a list of the service attributes, with the extent of the importance on perceptions of overall performance quantified. *A correlation of less than 0.3 is fairly weak, between 0.3 and 0.6 quite strong, and above 0.6, the correlation is considered very strong. The maximum correlation score is 1.0, representing perfect correlation*.

Table 6.1: Importance of Correlation Coefficients

Importance	Correlation Coefficient
High Importance	> 0.6
Medium Importance	0.30 – 0.6
Lesser Importance	≤ 0.3

Plotting the importance of each individual aspect against its current performance (% giving a rating of 6+*) shows areas that are currently doing (relatively) well, areas for improvement and 'hygiene factors' where the level of service needs to be maintained.

**Note: Prior to Jun '17 Yr mean ratings were used to plot performance*



6.2 Gap Analysis – Train

Figure 6.1 plots the importance of each individual aspect of the journey against performance (% giving a rating of 6+) in the year to June 2018 for the train.

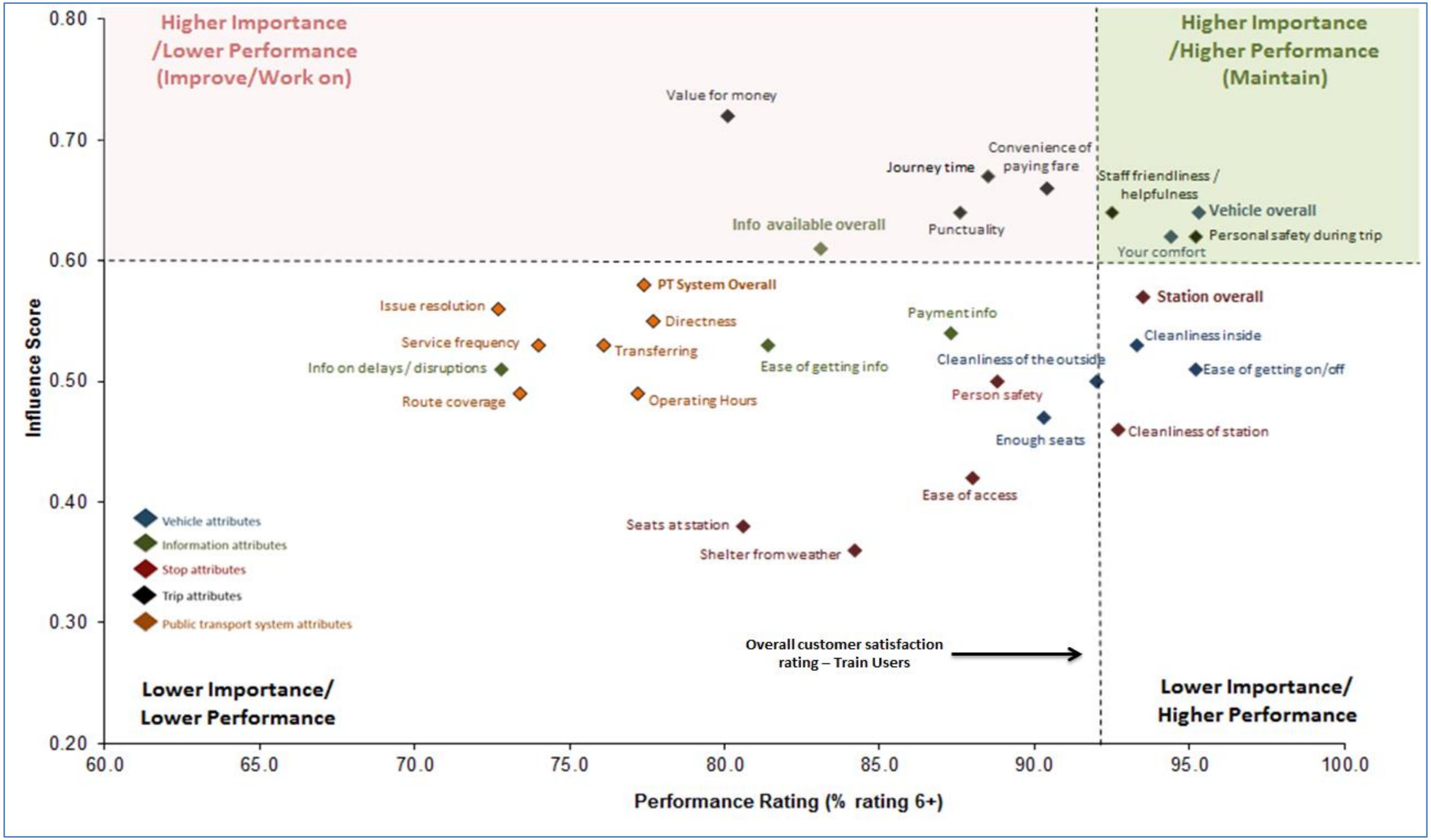
- The attributes with the highest performance rating are the vehicle overall (95.3% giving a positive rating), the ease of getting on/off trains (95.2%), personal safety during the trip (95.2%), and passenger comfort (94.4%). These attributes should all be maintained along with particular focus on the three attributes that sit in the high importance category – personal safety, comfort and the vehicle overall – to ensure overall ratings remain high.

- Five attributes - including value for money, information overall, journey time, punctuality and the convenience of paying the fare - fall in the high importance/low performance category. Improvements in performance of these attributes will have the biggest impact on the improvement of overall satisfaction rating of train services.

  Note: In the year to June ’17, six attributes fell in the high importance/low performance category (the additional attribute was the PT system overall).

- The attributes with the lowest performance ratings include how complaints are handled and solved (72.7% giving a positive rating), information on delays and disruptions (72.8%), route coverage (73.4%), and frequency of service (74.0%). However these are of lower importance.

Figure 6.1: Gap Analysis – Train



6.3 Gap Analysis – Bus

Figure 6.2 plots the importance of each individual aspect of the journey against performance (% giving a rating of 6+) in the year to June 2018 for the bus.

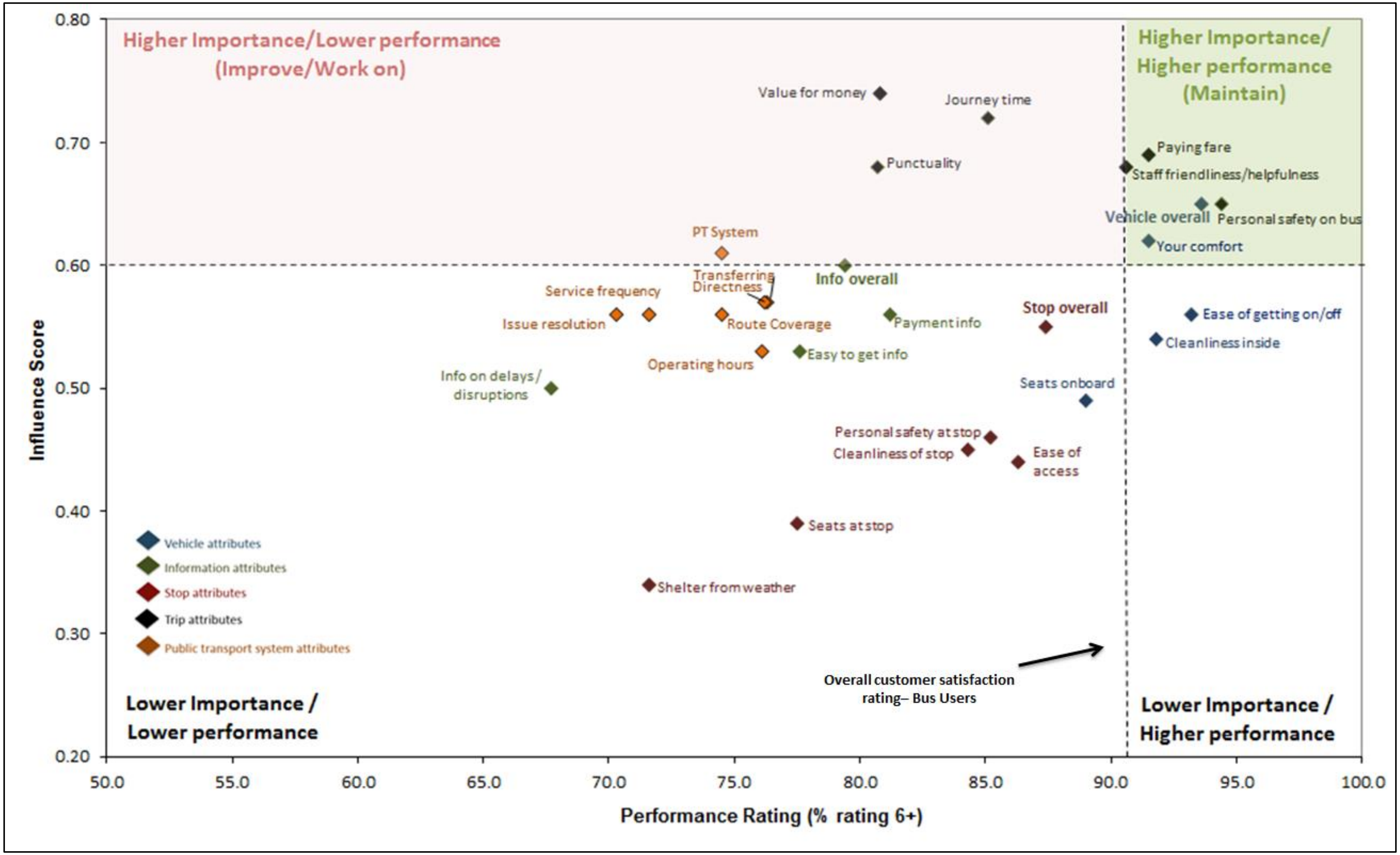
- The best performing areas of bus services are personal safety on-board (with 94.4% giving a positive performance rating), the overall vehicle condition (93.6%), and the ease of getting on/off buses (93.2%). These, along with the convenience of paying the fare, passenger comfort and staff friendliness/helpfulness (the three other attributes in the high importance category) should be maintained to ensure overall ratings remain high.

- Four attributes, including value for money, journey time, punctuality, and the PT system, fall within the high importance/low performance category. Improvements in performance of these attributes will have the biggest impact on the improvement of the overall satisfaction rating of bus services.

  Note: In the year to June '17, five attributes fell in the high importance/low performance category (the fifth attribute was information overall).

- The attribute with the lowest performance rating, and the only attribute where less than seven out of ten respondents gave a positive rating, continues to be the ease of getting information about delays and disruptions (only 67.7% giving a positive rating).

Figure 6.2: Gap Analysis – Bus



6.4 Gap Analysis – Ferry

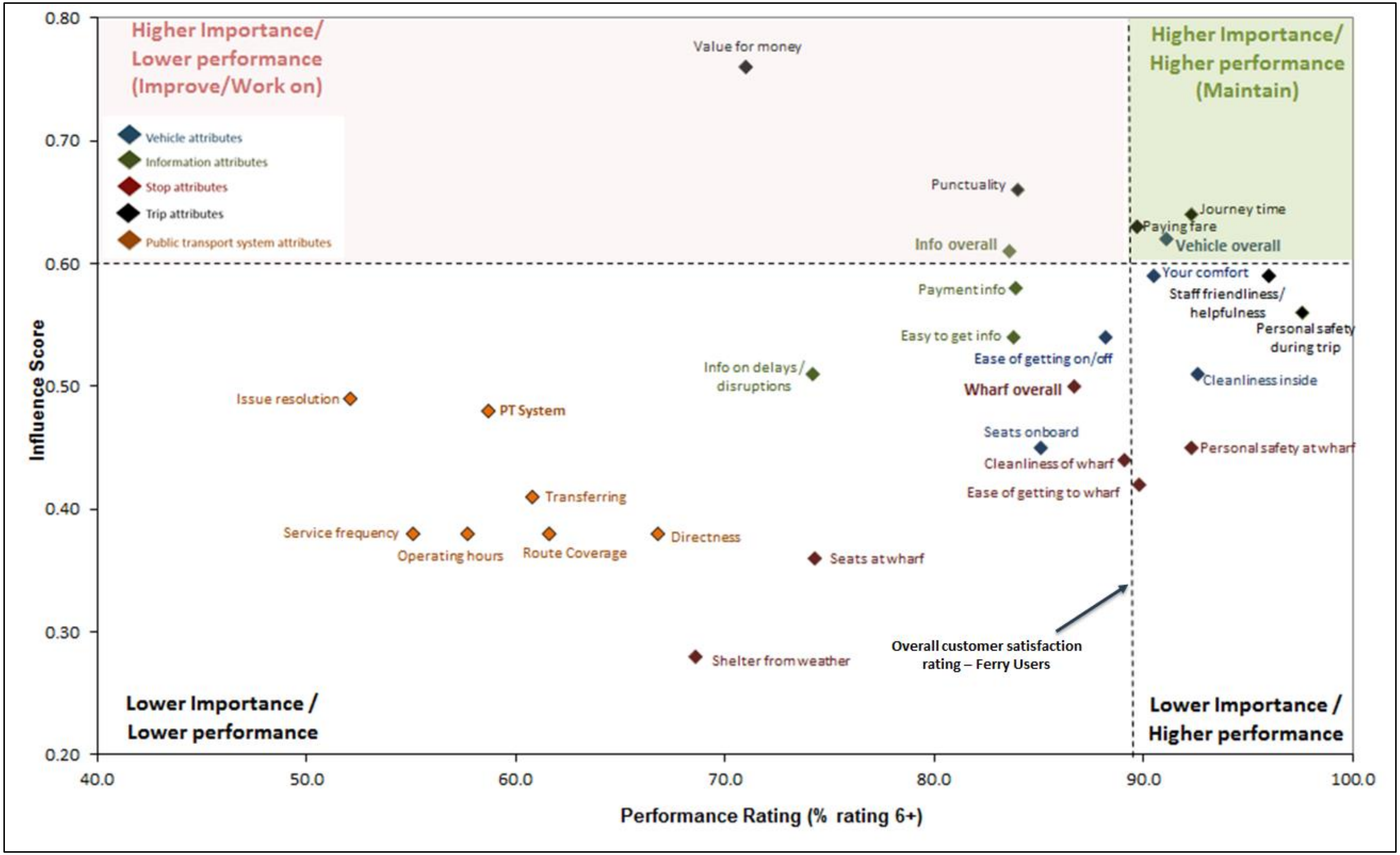
Figure 6.3 plots the importance of each individual aspect of the journey against performance (% giving a rating of 6+) in the year to June 2018 for the ferry.

- The attributes with the highest ratings are personal safety on ferry (with 97.6% giving a positive rating) and staff friendliness/helpfulness (96.0%). These attributes, along with the other attributes in the high importance category – including journey time, convenience of paying the fare and the vehicle overall - should all be maintained to ensure a high overall rating.

- All attributes relating to the PT system received performance scores below 70%, including the lowest performance ratings overall being given to issue resolution (only 52.1% giving a positive rating), the frequency of the service (55.1%), and the operating hours of the services (57.7%). However these are all of lower importance.

- Only three attributes - value for money, punctuality and information available overall - fall in the high importance/low performance category. Improvements in performance of these attributes will have the biggest impact on the improvement of overall satisfaction rating of ferry services.

Figure 6.3: Gap Analysis – Ferry



7. AT HOP Card

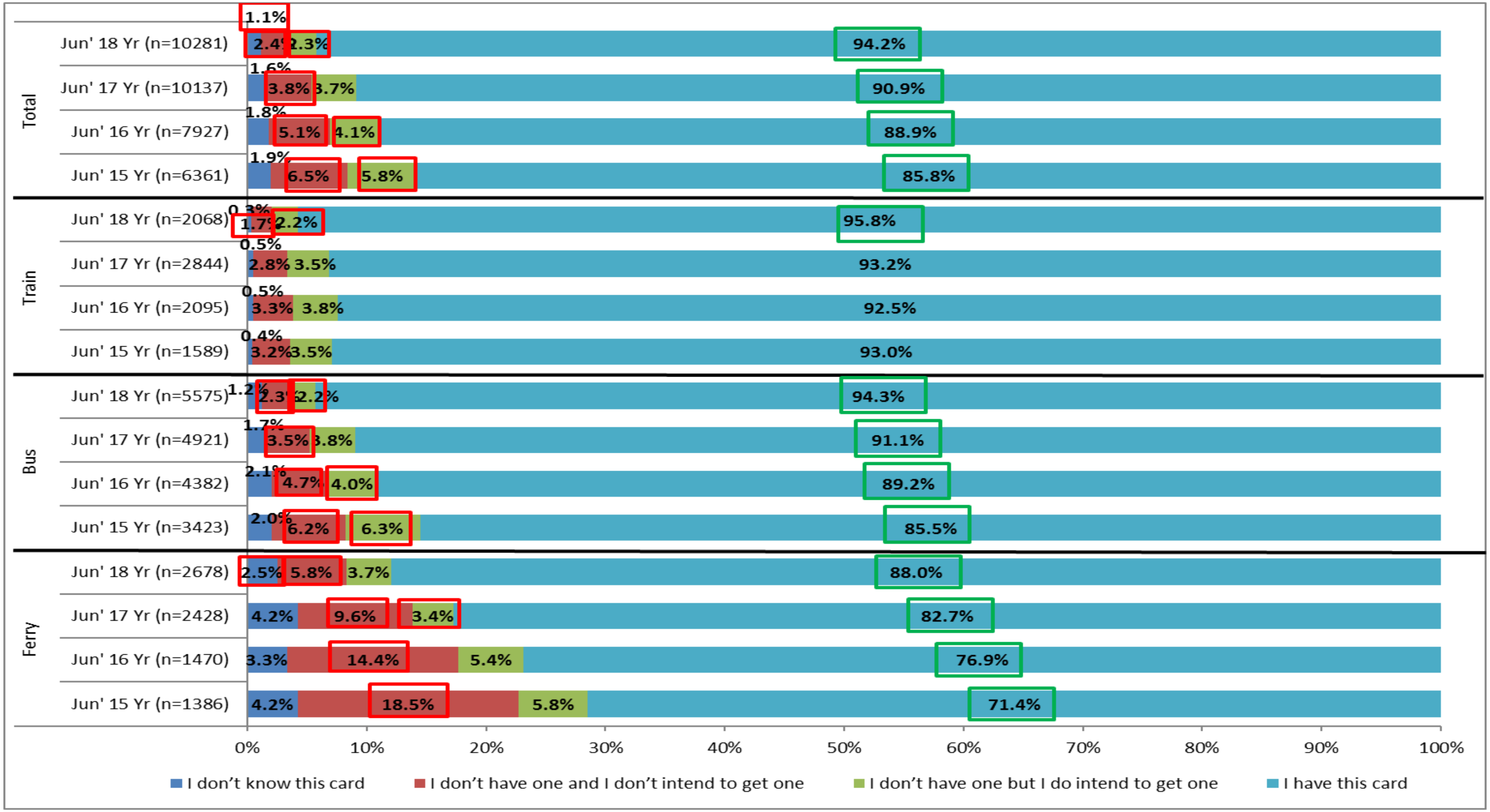
7.1 AT HOP Card Ownership and Awareness

Figure 7.1 illustrates respondents' awareness of the AT HOP Card among respondents surveyed on each mode.

- The proportion of all respondents who own an AT HOP card has increased significantly year-on-year, from 85.8% in the year to June '15, up to 94.2%.
- This year, an additional 2.3% of all respondents indicated that they intend to get a HOP Card, (down significantly from 3.7% last year).
- The share that do not have a HOP card and do not intend to get one has decreased significantly year-on-year from 6.5% in 2015 to 2.4% for the current year.
- Although AT HOP Card ownership overall is high, it varies by mode, from 95.8% of all train passengers and 94.3% of bus passengers surveyed this year, down to 88.0% of ferry respondents.
- Rates of HOP Card ownership across all modes have increased significantly compared to last year:
    - Trains 95.8%, up from 93.2%
    - Buses 94.3%, up from 91.1%
    - Ferries 88.0%, up from 82.7%

Note: the lower levels of AT HOP Card ownership among ferry passengers is likely to be due, at least in part, to the relatively higher number of respondents who use the ferry service less than monthly, including for the first time on the day of the survey (please refer to Section 9.1).

Figure 7.1: AT HOP Card Ownership and Awareness



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.

Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

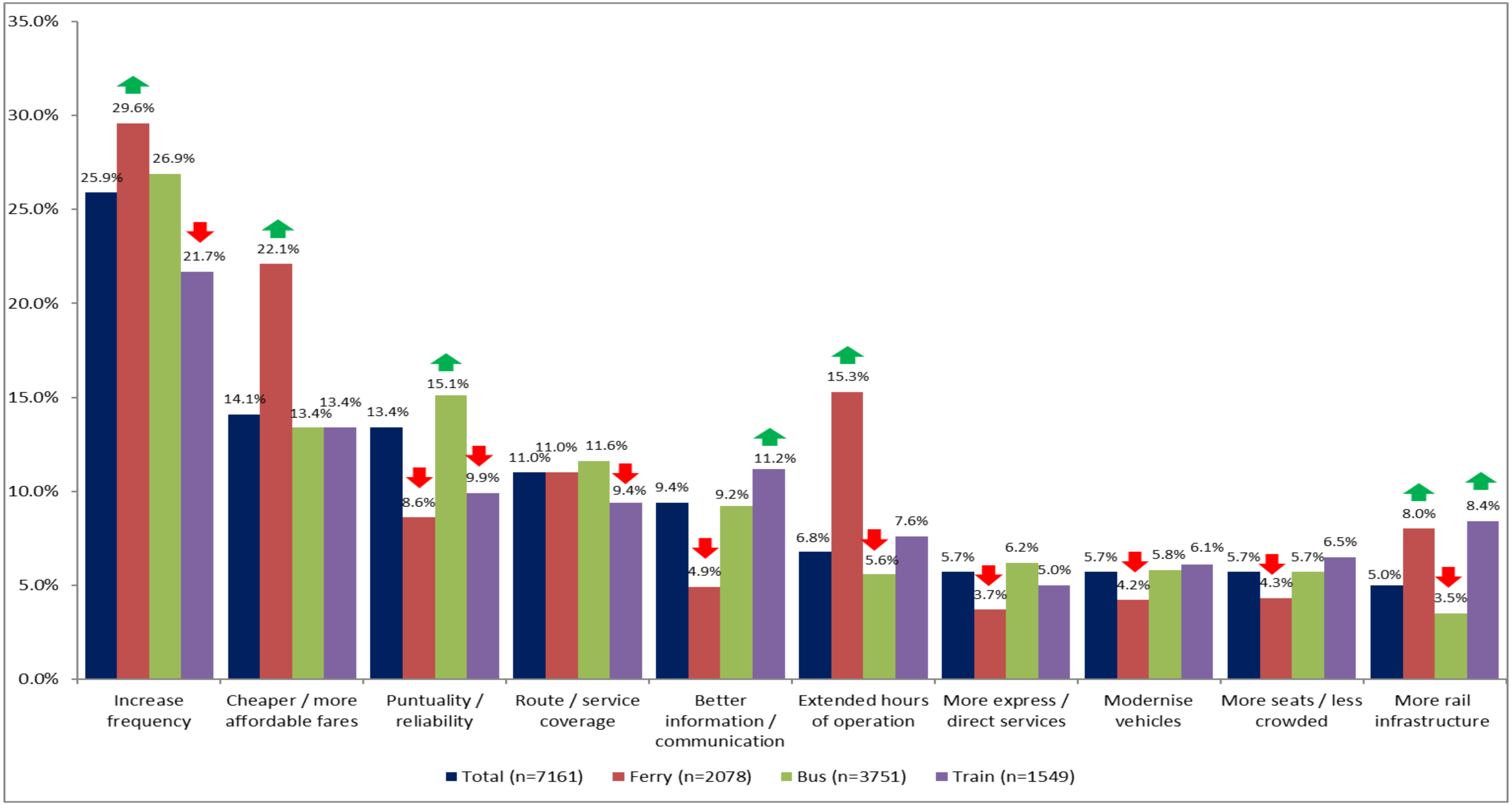
8. Key Improvements

Figure 8.1 identifies the key improvement suggestions made by respondents overall and across each mode in the year to June ’18, to improve Auckland’s public transport services and encourage a greater use of public transport.

- Consistent with the previous three years, the most frequently suggested improvements are to increase the frequency of services (25.9%), to provide cheaper/more affordable fares (14.1%, down significantly from 16.2% last year), and improvements to the punctuality/reliability of services (13.4%).
- The most commonly mentioned suggestions are similar across all three modes. However, there are some significant differences across the modes, including:
  - increasing the frequency of services is significantly more likely to be suggested by ferry respondents (29.6%) and less likely to be suggested by train respondents (21.7%);
  - making the fares cheaper/more affordable is significantly more likely to be suggested by ferry respondents (22.1%); and
  - improvements to the punctuality/reliability of services is significantly more likely to be mentioned by bus respondents (15.1%) and significantly less likely to be mentioned by train (9.9%) and ferry (8.6%) respondents.

Note: There are also significant differences between modes for other key suggestions. These are also noted on Figure 8.1.

Figure 8.1: Key Improvements Suggested by Customers



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Graph lists most common suggestions in Jun '17 Yr. Multiple responses permitted, therefore results may total more than 100%.
Green arrow indicates a significantly higher result when compared with the total, the red arrow indicates a significantly lower result.

Table 8.1 identifies the key improvement suggestions made overall and by each mode over time, to improve Auckland's public transport services and encourage a greater use of public transport. Any significant changes in mention of each suggestion from the previous year (either higher or lower) are highlighted.

Table 8.1: Key Improvements Suggested by Customers by Mode

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=3808)	Jun '15 Yr (n=4573)	Jun '16 Yr (n=5296)	Jun '17 Yr (n=6803)	Jun '18 Yr (n=7161)	Jun '14 Yr (n=1008)	Jun '15 Yr (n=1224)	Jun '16 Yr (n=1422)	Jun '17 Yr (n=1949)	Jun '18 Yr (n=1549)	Jun '14 Yr (n=1781)	Jun '15 Yr (n=2407)	Jun '16 Yr (n=2887)	Jun '17 Yr (n=3243)	Jun '18 Yr (n=3751)	Jun '14 Yr (n=1106)	Jun '15 Yr (n=1051)	Jun '16 Yr (n=1077)	Jun '17 Yr (n=1812)	Jun '18 Yr (n=2078)
Increased frequency	14.6%	**22.9%**	22.9%	**24.8%**	25.9%	14.7%	**17.9%**	17.9%	19.9%	21.7%	14.4%	**24.1%**	23.5%	**25.8%**	26.9%	17.2%	**24.1%**	**30.1%**	29.6%	**29.6%**
Cheaper/more affordable fares	24.3%	**21.5%**	21.4%	**16.2%**	**14.1%**	19.3%	19.6%	21.5%	**18.7%**	**13.4%**	25.0%	**21.6%**	21.3%	**14.8%**	13.4%	28.4%	24.7%	22.2%	21.0%	22.1%
Punctuality/reliability	18.3%	17.7%	**13.5%**	14.5%	13.4%	20.9%	22.9%	**15.1%**	**7.7%**	**9.9%**	18.9%	17.2%	**13.5%**	**17.3%**	**15.1%**	6.0%	**9.4%**	9.4%	9.6%	8.6%
Routes/service coverage	8.5%	8.4%	**10.6%**	9.9%	**11.0%**	6.9%	5.8%	7.5%	**9.5%**	9.4%	8.6%	8.4%	**11.4%**	10.1%	**11.6%**	10.9%	**8.0%**	**10.9%**	9.2%	11.0%
More information/better communications	6.3%	**8.5%**	8.1%	**9.3%**	9.4%	6.9%	**9.8%**	9.2%	8.2%	**11.2%**	6.5%	**8.6%**	8.1%	**10.2%**	9.2%	3.1%	**4.8%**	5.2%	4.2%	4.9%
Extended hours of operation	8.6%	**6.3%**	6.3%	**8.1%**	**6.8%**	11.3%	**6.1%**	6.5%	**8.4%**	7.6%	7.4%	6.2%	5.9%	**7.2%**	**5.6%**	14.7%	**8.8%**	9.9%	**15.1%**	15.3%
More express/direct services	3.7%	3.9%	**5.5%**	5.2%	5.7%	3.5%	3.4%	4.4%	4.7%	5.0%	3.9%	4.25	**6.1%**	5.5%	6.2%	2.8%	2.5%	2.7%	3.8%	3.7%

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=3808)	Jun '15 Yr (n=4573)	Jun '16 Yr (n=5296)	Jun '17 Yr (n=6803)	Jun '18 Yr (n=7161)	Jun '14 Yr (n=1008)	Jun '15 Yr (n=1224)	Jun '16 Yr (n=1422)	Jun '17 Yr (n=1949)	Jun '18 Yr (n=1549)	Jun '14 Yr (n=1781)	Jun '15 Yr (n=2407)	Jun '16 Yr (n=2887)	Jun '17 Yr (n=3243)	Jun '18 Yr (n=3751)	Jun '14 Yr (n=1106)	Jun '15 Yr (n=1051)	Jun '16 Yr (n=1077)	Jun '17 Yr (n=1812)	Jun '18 Yr (n=2078)
Modernise vehicles	3.6%	3.8%	3.1%	**4.9%**	**5.7%**	4.8%	4.1%	**2.4%**	**5.2%**	6.1%	3.4%	3.7%	3.2%	**4.9%**	5.8%	2.9%	3.9%	4.3%	3.8%	4.2%
More seats/less crowded services	7.4%	**5.7%**	6.6%	**4.4%**	**5.7%**	7.9%	7.8%	**5.0%**	5.8%	6.5%	7.2%	**5.3%**	**7.0%**	**4.0%**	**5.7%**	8.0%	**3.4%**	**7.0%**	**3.9%**	4.3%
More rail infrastructure	2.5%	2.6%	**3.4%**	**4.5%**	5.0%	1.5%	2.1%	**5.2%**	**7.6%**	8.4%	2.4%	2.4%	2.6%	3.1%	3.5%	5.2%	6.0%	6.6%	8.0%	8.0%
Better staff/drivers	5.0%	4.2%	4.1%	4.7%	4.7%	3.6%	**1.8%**	**3.4%**	2.5%	2.0%	5.6%	5.1%	4.5%	**5.7%**	6.0%	2.2%	1.5%	1.8%	2.0%	2.0%
Coordination between services	0.0%	0.0%	**2.4%**	**4.0%**	4.1%	0.0%	0.0%	**2.5%**	**5.1%**	5.1%	0.0%	0.0%	**2.3%**	**3.3%**	3.4%	0.0%	0.0%	**2.8%**	**6.0%**	7.0%
Improved Park-and-Ride facilities	3.9%	**5.1%**	**6.4%**	**3.2%**	3.6%	3.4%	4.0%	5.5%	5.1%	4.8%	3.9%	4.9%	**6.4%**	**2.3%**	2.9%	5.3%	**8.7%**	8.3%	**6.2%**	5.9%
Better station/stops/ wharves	2.3%	2.5%	2.0%	**3.4%**	3.4%	1.5%	1.6%	2.6%	3.2%	3.2%	2.5%	2.5%	**1.7%**	**3.5%**	3.4%	2.3%	**4.9%**	3.4%	3.8%	4.1%
Faster services	3.3%	3.8%	3.3%	3.4%	3.3%	6.7%	6.0%	5.3%	4.3%	3.9%	2.6%	3.3%	2.9%	3.1%	3.2%	2.9%	2.7%	2.8%	3.0%	3.0%
Ticketing/methods of payment	3.9%	**2.4%**	**3.2%**	**2.1%**	**2.6%**	7.1%	**1.7%**	3.2%	**1.8%**	1.9%	3.2%	2.4%	3.2%	**2.2%**	2.8%	4.1%	4.0%	3.6%	**1.9%**	2.6%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Table lists suggestions given by 2% or more total respondents in Jun '17 Yr. Multiple responses permitted, therefore table may total more than 100%.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

9. Travel Behaviour

This section examines the travel behaviour of the surveyed passengers including:

- How often they make the journey by public transport;
- Why they took the trip; and
- How they got to the stop/station/wharf and how they will get to their final destination.

This provides a broad overview of customer use of services overall and by mode.

9.1 Frequency of Trip

Table 9.1 illustrates how often passengers said they use public transport to make their current trip overall and by mode.

- Almost two-thirds (64.2%) of respondents make the trip they were on when surveyed at least five days per week. This is a similar share to the previous year (63.4%).
- The share who make their trip five or more times per week is similar among those surveyed on both the bus (64.7%) and train (63.8%), while only 60.8% of ferry users make the trip this frequently.
- When compared with last year, there has been a significant increase in the share of respondents who make the trip two to four days per week (23.0%, up from 21.3%) and monthly to weekly (7.8%, up from 6.2%). The monthly to weekly increase is consistent across all modes, while the two to four day increase is most notable on the train.
- This year, there has been a significant decrease in the overall share of respondents making the trip for the first time on the day of the survey (5.0%, down from 9.1%). This decrease is consistent across all modes.

Table 9.1: Frequency of Trip

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=5239)	Jun '15 Yr (n=6527)	Jun '16 Yr (n=8004)	Jun '17 Yr (n=10335)	Jun '18 Yr (n=10474)	Jun '14 Yr (n=1305)	Jun '15 Yr (n=1619)	Jun '16 Yr (n=2116)	Jun '17 Yr (n=2892)	Jun '18 Yr (n=2098)	Jun '14 Yr (n=2492)	Jun '15 Yr (n=3524)	Jun '16 Yr (n=4427)	Jun '17 Yr (n=5027)	Jun '18 Yr (n=5691)	Jun '14 Yr (n=1459)	Jun '15 Yr (n=1398)	Jun '16 Yr (n=1474)	Jun '17 Yr (n=2447)	Jun '18 Yr (n=2707)
Five days per week or more	70.8%	71%	**67.4%**	**63.4%**	64.2%	**76.6%**	75.4%	**67.5%**	**64.2%**	63.8%	70.5%	70.3%	**67.8%**	**63.7%**	64.7%	62.1%	**67.6%**	**62.8%**	**57.2%**	**60.8%**
Two to four days per week	18.5%	18.2%	**20.2%**	21.3%	**23.0%**	17.7%	17.3%	**21.1%**	20.3%	**23.1%**	18.5%	18.4%	20.2%	21.7%	23.3%	20.4%	**17.2%**	18.5%	20.1%	20.3%
Monthly to weekly	4.8%	5.1%	4.8%	**6.2%**	**7.8%**	2.8%	3.55%	**5.2%**	**7.4%**	**9.1%**	4.6%	5.3%	4.3%	**5.7%**	**7.2%**	10.2%	**7.9%**	8.1%	8.0%	**9.9%**
Less than monthly/ first time	5.9%	5.8%	**7.6%**	**9.1%**	**5.0%**	2.8%	3.8%	**6.3%**	**8.1%**	**4.1%**	6.4%	6.0%	**7.7%**	**8.9%**	**4.9%**	7.3%	7.4%	**10.7%**	**14.8%**	**9.0%**

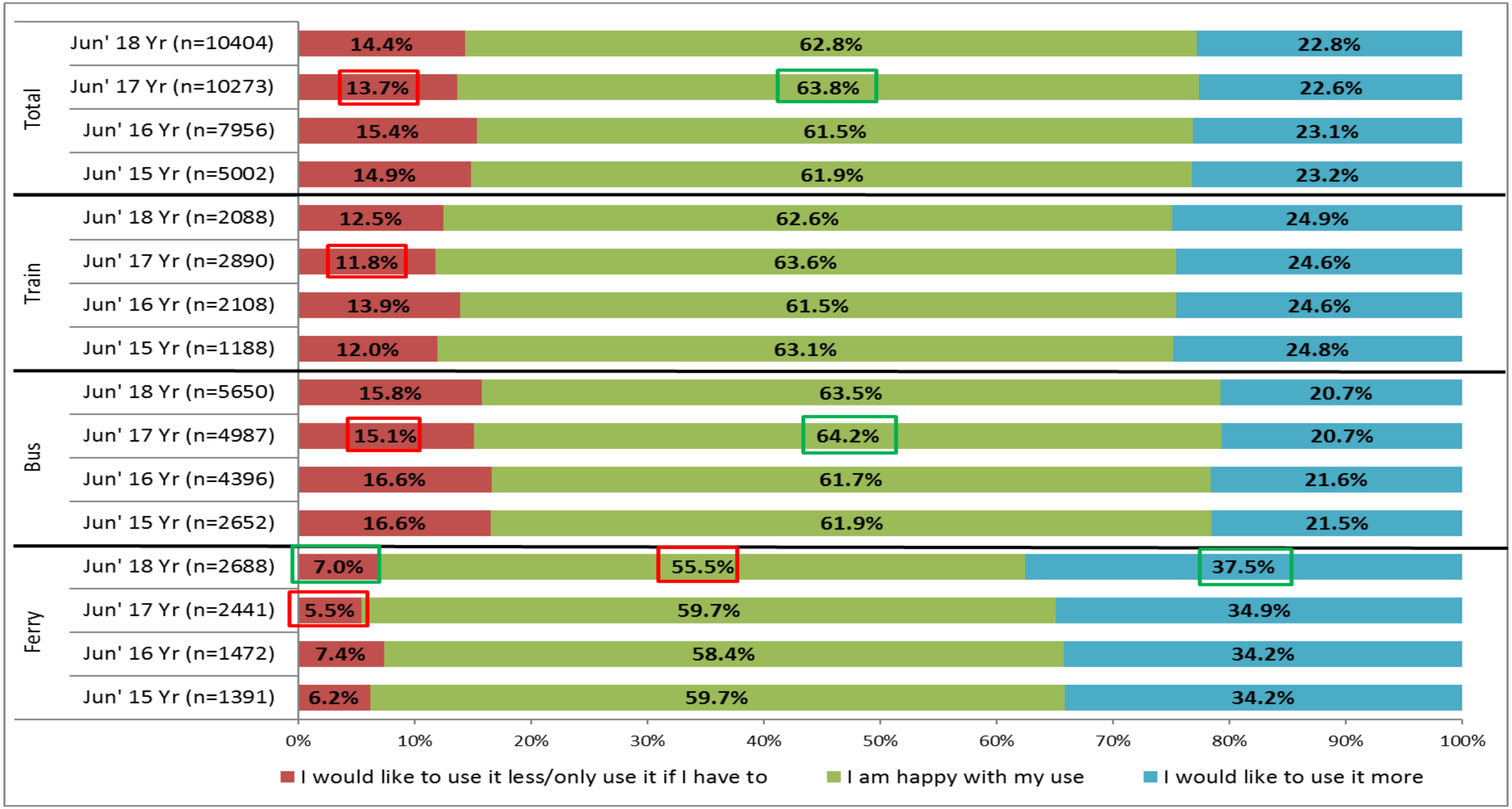
Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

9.2 Preference for Using Public Transport

Figure 9.1 displays customers' preferences for using the public transport system overall as well as by mode.

- This year, just less than two thirds of all respondents overall (62.8%) indicated that they are happy with their use of public transport, while 22.8% said they would like to use it more than they do currently. Only 14.4% said they would prefer to use it less or only when they have to.
- The share of respondents who would like to use public transport more than they do currently ranges from 37.5% among ferry respondents, down to 20.7% among bus respondents.
- While 7.0% of ferry respondents mentioned they would like to use public transport less or only when they have to, this share has increased significantly from 5.5% last year.
- However, there has also been a significant increase in ferry respondents saying they would like to use it more (37.5%, up from 34.9%).

Figure 9.1: Preferences for Using Public Transport



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response. Green highlighting indicates a significant increase from the previous year, red highlighting indicates a significant decrease from the previous year.

9.3 Main Reason for Using Public Transport to Make Trip

Availability of a Private Vehicle

All respondents were asked if they had a private vehicle available to them to make the trip on the day of the survey. Table 9.2 shows the results overall and by mode.

- Overall, just over half of all respondents mentioned that a private vehicle was available for them to make the trip, whether as a driver (32.0%, up significantly from 29.3% last year) or as a passenger (23.4%, stable compared to last year after three years of significant increases). There has been a significant decrease in the share who do not have access to a private vehicle (44.7%, down from 46.4% last year).
- Availability of a private vehicle (either as a driver or passenger) ranges from 75.3% for ferry respondents, down to 52.4% of those surveyed on the bus.
- However, it should be noted that, compared with last year, there has been a significant decrease in the share of bus respondents without access to a private vehicle (down from 50.6%, to 47.7%). Among bus respondents who had access to a private vehicle there has been a significant increase in those who could have been a driver (up from 24.0% to 27.8%).
- There has also been a significant decrease in the share of ferry passengers who had access to a car as a passenger (down from 16.0%, to 13.4%).

Table 9.2: Availability of Private Vehicle to Make Trip

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=4989)	Jun '15 Yr (n=6306)	Jun '16 Yr (n=7863)	Jun '17 Yr (n=10003)	Jul '18 Yr (n=10195)	Jun '14 Yr (n=1271)	Jun '15 Yr (n=1581)	Jun '16 Yr (n=2084)	Jun '17 Yr (n=2830)	Jun '178Yr (n=2058)	Jun '14 Yr (n=2357)	Jun '15 Yr (n=3391)	Jun '16 Yr (n=4341)	Jun '17 Yr (n=4838)	Jun '17 8r (n=5521)	Jun '14 Yr (n=1424)	Jun '15 Yr (n=1372)	Jun '16 Yr (n=1466)	Jun '17 Yr (n=2420)	Jun '18Yr (n=2664)
No private vehicle available	48.1%	46.5%	45.0%	46.4%	**44.7%**	35.6%	37.1%	38.0%	40.1%	41.2%	53.0%	51.1%	**48.2%**	**50.6%**	**47.7%**	24.0%	21.1%	**25.4%**	24.7%	24.7%
Yes – as a driver	36.8%	35.0%	33.5%	**29.3%**	**32.0%**	44.6%	42.2%	**35.9%**	36.4%	36.4%	32.4%	30.5%	30.1%	**24.0%**	**27.8%**	64.6%	65.0%	61.7%	59.3%	61.9%
Yes – as a passenger	15.2%	**18.5%**	**21.5%**	**24.3%**	23.4%	19.8%	20.8%	**24.1%**	23.5%	22.5%	14.6%	**18.4%**	**21.7%**	**25.4%**	24.6%	11.4%	**13.9%**	12.9%	**16.0%**	**13.4%**

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

Reason for Making Trip By Public Transport

Those respondents who did have a private vehicle available were asked why they chose to travel by public transport rather than private vehicle. Table 9.3 shows the most frequently mentioned reasons for using public transport when a private vehicle was available overall and by mode.

- Parking being too hard to find or too expensive (33.8%, up significantly from 30.5% last year), being either more convenient/easier (19.0%) or quicker (9.4%) than private alternatives, and avoiding congestion (9.3%, up significantly from 7.7% last year) are the most frequently mentioned reasons given by all respondents.
- The most commonly mentioned reasons are the same across all modes, with parking being too hard to find and public transport being more convenient being the top two reasons given by respondents travelling on the bus, train and ferry.
- When comparing reasons given this year to last year's results by mode, there have been some significant increases or decreases in reasons mentioned by respondents across all modes.
- The most notable changes for the bus has been a significant increase in the share of respondents travelling by public transport because parking is too hard to find and/or too expensive, and a significant decrease in the shares mentioning the expense of running a vehicle.
- The share of ferry respondents mentioning avoiding congestion has increased significantly, while there has been a decrease in the share mentioning that the ferry is more convenient than private alternatives.
- There has also been a significant increase among train respondents mentioning avoiding congestion.

Table 9.3: Main Reason for Using Public Transport to Make Trip

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=3161)	Jun '15 Yr (n=4102)	Jun '16 Yr (n=4479)	Jun '17 Yr (n=5271)	Jun '18 Yr (n=5543)	Jun '14 Yr (n=995)	Jun '15 Yr (n=1168)	Jun '16 Yr (n=1294)	Jun '17 Yr (n=1674)	Jun '18 Yr (n=1200)	Jun '14 Yr (n=1386)	Jun '15 Yr (n=2088)	Jun '16 Yr (n=2338)	Jun '17 Yr (n=2341)	Jun '18 Yr (n=2827)	Jun '14 Yr (n=1115)	Jun '15 Yr (n=1097)	Jun '16 Yr (n=1088)	Jun '17 Yr (n=1808)	Jun '18 Yr (n=1997)
Parking hard to find/ too expensive	29.5%	**32.7%**	**36.7%**	**30.5%**	**33.8%**	25.6%	**29.5%**	32.6%	31.5%	32.1%	31.9%	34.9%	**39.4%**	**31.7%**	**36.2%**	19.8%	22.6%	**26.5%**	**19.8%**	20.8%
More convenient than private alternatives	17.3%	17.9%	17.5%	**19.8%**	19.0%	18.6%	15.5%	16.6%	18.2%	19.3%	16.3%	18.2%	17.2%	**19.9%**	18.8%	21.6%	20.8%	22.2%	23.4%	**19.7%**
Quicker than private alternatives	10.9%	9.7%	10.2%	**9.0%**	9.4%	11.2%	11.9%	11.5%	10.0%	9.9%	10.3%	8.4%	9.2%	7.9%	8.5%	15.0%	15.8%	15.0%	13.2%	15.2%
Avoids congestion	8.1%	8.3%	8.7%	7.7%	**9.3%**	11.1%	11.4%	10.8%	9.9%	**12.3%**	6.6%	6.7%	7.3%	**5.6%**	6.9%	12.5%	14.1%	14.6%	14.9%	**18.4%**
Less stressful than private alternatives	9.1%	9.1%	**7.8%**	8.9%	8.4%	9.4%	9.9%	8.8%	10.2%	8.8%	8.2%	8.1%	7.2%	7.8%	7.9%	14.9%	15.5%	**10.2%**	**12.7%**	11.2%
Cost of fuel/ running vehicle too expensive	12.6%	**10.6%**	**8.6%**	**10.2%**	**8.1%**	14.4%	12.2%	10.0%	10.2%	8.8%	13.2%	**11.0%**	**9.0%**	**11.2%**	**8.5%**	4.4%	3.9%	**2.0%**	**3.6%**	2.9%
Wants to be socially responsible	3.4%	4.2%	4.5%	5.3%	5.1%	2.3%	2.9%	**4.5%**	4.5%	5.3%	3.8%	4.6%	4.7%	5.7%	5.1%	2.7%	3.7%	3.8%	4.1%	4.3%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

9.4 Mode of Transport To Station / Stop / Wharf

Table 9.4 shows how respondents travelled to the bus/station/wharf where they started the trip they were surveyed on, overall and by mode.

- Walking is the most frequently mentioned way of getting to the stop/station/wharf across all respondents (64.0%), although the share is down significantly from 65.5% last year. The next most commonly mentioned mode used to travel to the stop/station/wharf is the bus (up significantly for the second consecutive year, from 13.8% last year to 15.3%), followed by train (6%, up significantly for the second consecutive year, from 5.1% last year).
- Walking is the most common method across all modes and ranges from 67.4% for bus respondents, to 51.9% for ferry respondents.
- However, it should be noted that, compared to last year, there has been a significant decrease in the share of respondents walking to access buses (down from 69.8% last year, to 67.4%).
- The share catching a bus to access trains has increased significantly (up from 11.0% last year, to 14.5%), while the share travelling as a passenger in a car to access trains has decreased significantly for the second consecutive year (down from 12.6% last year to 10.8%).
- The shares travelling as a passenger in a car (down from 11.7%, to 9.7%) and cycling (down from 6.3%, to 4.9%) to the ferry have also declined significantly compared to last year.

Table 9.4: Mode of Transport To Station/Stop/Wharf

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=5359)	Jun '15 Yr (n=6633)	Jun '16 Yr (n=8101)	Jun '17 Yr (n=10505)	Jun '18 Yr (n=10625)	Jun '14 Yr (n=1341)	Jun '15 Yr (n=1638)	Jun '16 Yr (n=2136)	Jun '17 Yr (n=2916)	Jun '18 Yr (n=2119)	Jun '14 Yr (n=2551)	Jun '15 Yr (n=3588)	Jun '16 Yr (n=4487)	Jun '17 Yr (n=5128)	Jun '18 Yr (n=5785)	Jun '14 Yr (n=1466)	Jun '15 Yr (n=1409)	Jun '16 Yr (n=1480)	Jun '17 Yr (n=2462)	Jun '18 Yr (n=2724)
Walk	65.5%	65.0%	62.2%	65.5%	64.0%	41.2%	37.7%	45.6%	56.5%	56.5%	73.3%	74.3%	68.3%	69.8%	67.4%	35.1%	33.1%	44.0%	49.6%	51.9%
Bus	8.2%	7.8%	10.9%	13.8%	15.3%	9.0%	11.2%	11.0%	11.0%	14.5%	8.0%	7.0%	11.1%	15.3%	16.4%	8.3%	8.2%	8.0%	6.7%	6.8%
Train	2.1%	2.5%	3.7%	5.1%	6.0%	2.7%	3.5%	5.2%	6.5%	6.2%	2.0%	2.3%	3.5%	4.8%	6.1%	1.8%	1.9%	2.5%	3.7%	3.7%
Car (passenger)	9.3%	9.5%	9.1%	7.0%	5.9%	21.3%	21.5%	17.7%	12.6%	10.8%	6.6%	6.2%	6.7%	4.9%	4.1%	13.2%	15.3%	10.7%	11.7%	9.7%
Car (driver)	12.5%	12.4%	10.9%	5.8%	5.8%	21.7%	23.0%	17.0%	10.7%	9.5%	8.7%	7.9%	7.9%	2.9%	3.4%	33.2%	34.1%	25.6%	19.0%	20.1%
Ferry	1.2%	1.4%	1.9%	1.4%	1.5%	2.8%	1.8%	1.5%	0.8%	1.1%	0.8%	1.3%	1.9%	1.5%	1.6%	1.7%	1.2%	2.6%	2.2%	2.0%
Cycle	0.7%	0.7%	0.9%	0.8%	0.8%	1.0%	1.0%	1.7%	1.5%	1.3%	0.6%	0.7%	0.3%	0.1%	0.2%	5.1%	5.1%	5.2%	6.3%	4.9%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

9.5 Mode of Transport From Station / Stop / Wharf to Final Destination

Passengers were also asked how they will continue to their destination once they had disembarked the vehicle they were surveyed on. *Note: this question was added in the last quarter of 2016, therefore sample sizes are small and no time series data is available.*

Table 9.5 shows how respondents travelled from the bus/station/wharf where they got off the vehicle they were surveyed on to their final destination, overall and by mode.

- Walking is also the most frequently mentioned way of getting from the stop/station/wharf to the respondent's final destination (68.9%, up significantly from 67.4% last year). The next most commonly mentioned mode is the bus (14.4%), follow by private vehicle – whether as a driver (7.0%) or passenger (4.3%) – and a train (3.6%).
- Walking is the most common method across all modes.
- A car is used to travel to the final destination notably more often among those surveyed on a ferry (28.4% as the driver; 12.0% as a passenger), and to a lesser extent on a train (10.9% as the driver; 7.2% as a passenger), than among those surveyed on a bus (3.9% as the driver; 2.7% as a passenger).
- Use of a bicycle is also more frequent among ferry respondents (5.0%, compared with 1.1% among train users and 0.2% among bus users).

Table 9.5: Mode of Transport From Station/Stop/Wharf to Final Destination

	Total		Train		Bus		Ferry	
	Jun '17 Yr (n=8174)	Jun '18 Yr (n=10630)	Jun '17 Yr (n=2221)	Jun '18 Yr (n=2118)	Jun '17 Yr (n=3904)	Jun '18 Yr (n=5790)	Jun '17 Yr (n=2461)	Jun '18 Yr (n=2725)
Walk	67.4%	**68.9%**	58.3%	57.6%	74.2%	75.0%	36.8%	**39.5%**
Bus	14.0%	14.4%	15.1%	**18.0%**	14.2%	13.6%	10.1%	11.1%
Car (as driver)	6.6%	7.0%	10.3%	10.9%	2.6%	**3.9%**	28.6%	28.4%
Car (as passenger)	4.5%	4.3%	7.9%	7.2%	2.3%	2.7%	12.8%	12.0%
Train	4.9%	**3.6%**	6.0%	**4.4%**	4.9%	**3.5%**	2.2%	1.9%
Ferry	1.0%	**0.7%**	0.9%	0.6%	1.0%	0.6%	1.8%	**1.1%**
Cycle	1.0%	**0.7%**	1.2%	1.1%	0.1%	0.2%	6.8%	**5.0%**

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response. Table lists responses given by 1% or more of respondents. Given this question was first included in December 2016, time series data is not available.

9.6 Purpose of Trip

Table 9.6 shows the purpose of the trip they were making, overall and by mode.

- Travelling to/from work is the most common reason for making the trip overall (56.6%, up significantly from 54.3% last year) as well as across the three modes (ferry 73.3%; train 60.6%; bus 53.8%). The share travelling for work purposes has also increased significantly across all modes when compared to last year.
- Around one in five of all respondent (21.1%) are travelling to access tertiary education, while 10.4% (down significantly from 11.8% last year) are travelling for entertainment/ socialising/sightseeing reasons. These are second and third most common reasons across all modes.
- Travelling for entertainment/socialising/sightseeing has decreased significantly for both bus and ferry respondents since last year, while travelling to school via ferry has increased significantly.

Table 9.6: Purpose of Trip

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=5229)	Jun '15 Yr (n=6509)	Jun '16 Yr (n=7958)	Jun '17 Yr (n=10277)	Jun '18 Yr (n=10420)	Jun '14 Yr (n=1311)	Jun '15 Yr (n=1617)	Jun '16 Yr (n=2103)	Jun '17 Yr (n=2887)	Jun '18 Yr (n=2090)	Jun '14 Yr (n=2485)	Jun '15 Yr (n=3512)	Jun '16 Yr (n=4401)	Jun '17 Yr (n=4990)	Jun '18 Yr (n=5658)	Jun '14 Yr (n=1453)	Jun '15 Yr (n=1399)	Jun '16 Yr (n=1470)	Jun '17 Yr (n=2448)	Jun '18 Yr (n=2703)
Work	59.3%	63.6%	58.7%	54.3%	56.6%	68.3%	73.6%	63.4%	57.4%	60.6%	56.4%	59.9%	56.1%	51.8%	53.8%	70.5%	78.5%	72.8%	71.0%	73.3%
Tertiary Education	28.9%	21.9%	24.8%	20.1%	21.1%	26.2%	18.7%	23.5%	21.0%	22.1%	30.8%	24.0%	26.7%	21.1%	22.0%	14.3%	7.9%	9.2%	7.3%	7.7%
Entertain-ment/ socialising/ sightseeing	6.9%	6.6%	8.9%	11.8%	10.4%	2.9%	2.9%	8.0%	11.0%	10.2%	7.4%	7.3%	8.8%	11.4%	10.1%	9.4%	8.8%	12.3%	18.4%	14.4%
Personal business/ medical	5.5%	5.7%	5.5%	7.4%	7.1%	3.7%	2.6%	5.0%	7.3%	6.2%	5.7%	6.6%	5.6%	7.7%	7.6%	7.2%	4.9%	5.3%	4.8%	4.6%
School (Years 9-13)	4.1%	4.3%	3.7%	7.0%	7.0%	3.4%	4.0%	3.3%	5.2%	5.0%	4.4%	4.7%	4.1%	8.2%	8.2%	1.6%	1.2%	1.0%	0.8%	1.4%
Shopping	4.5%	4.4%	4.1%	6.6%	6.6%	1.8%	1.9%	3.8%	6.0%	6.3%	5.2%	5.2%	4.4%	7.3%	7.1%	3.0%	2.1%	2.1%	2.5%	2.2%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

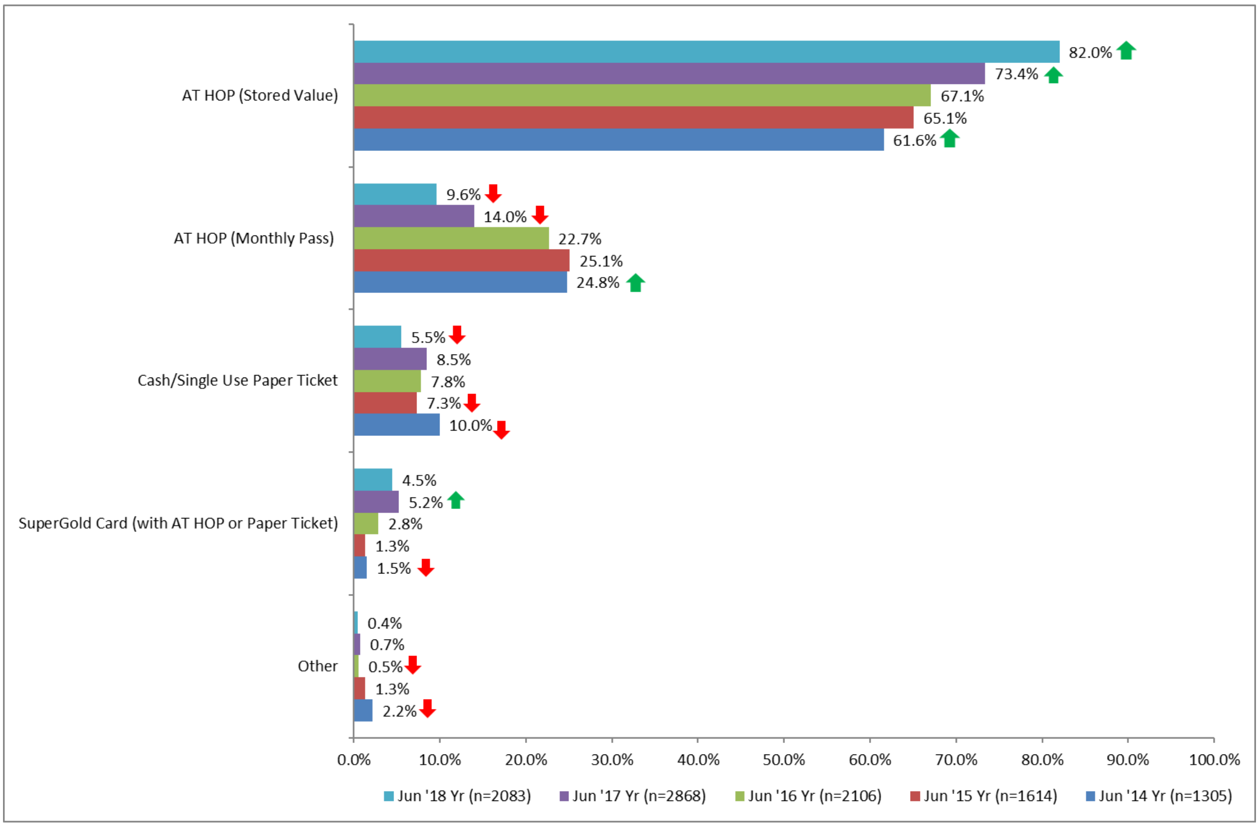
9.7 Type of Ticket Used

Train

Figure 9.2 shows the type of ticked used by train respondents over time.

- Train passengers are most likely to have paid for their trip using an AT HOP Card – either loaded with stored value (82.0%, up significantly from 73.4% last year) or with a monthly pass (9.6%, down significantly from 14.0%). An additional 4.5% had a SuperGold Card.
- Only 5.5% used cash/a single use paper ticket (down significantly from 8.5% last year, and the share has almost halved since 2014).

Figure 9.2: Type of Ticket Used – Train



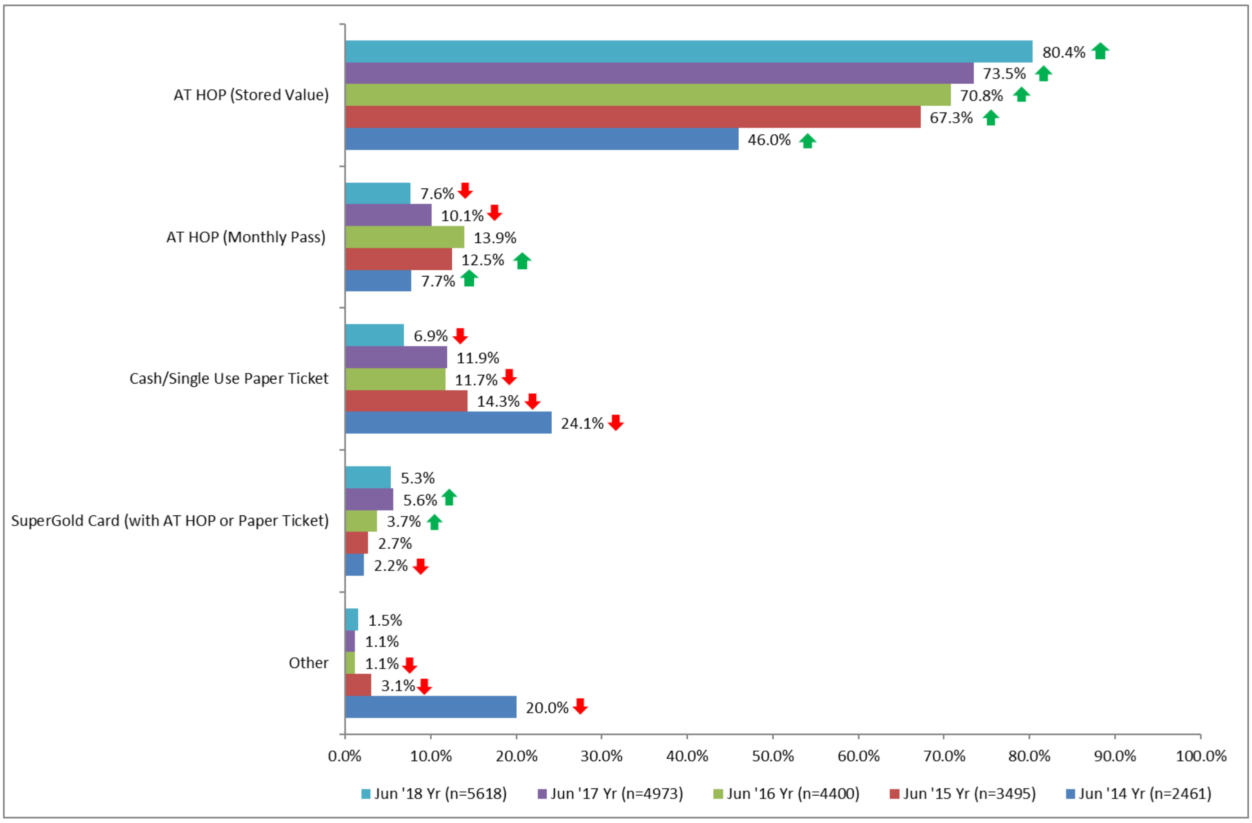
Base: All responses excluding those who did not answer the question or gave a 'not applicable' response. Green Arrow indicates a significant increase from the previous year, red arrow indicates a significant decrease from the previous year.

Bus

Figure 9.3 shows the type of ticked used by bus respondents over time.

- Bus passengers are also more likely to have paid for their trip using an AT HOP Card – either loaded with stored value (80.4%, up significantly from 73.5% last year) or with a monthly pass (7.6%, down significantly from 10.1%). An additional 5.3% had a SuperGold Card. Only 6.9% used cash/single use paper ticket (down significantly from 11.9% last year).
- Since the year ending June 2014, the general pattern has been a significant year-on-year increase in the share paying via AT HOP Card and a related year-on-year decrease in the share paying by cash (single use paper ticket).

Figure 9.3: Type of Ticket Used – Bus



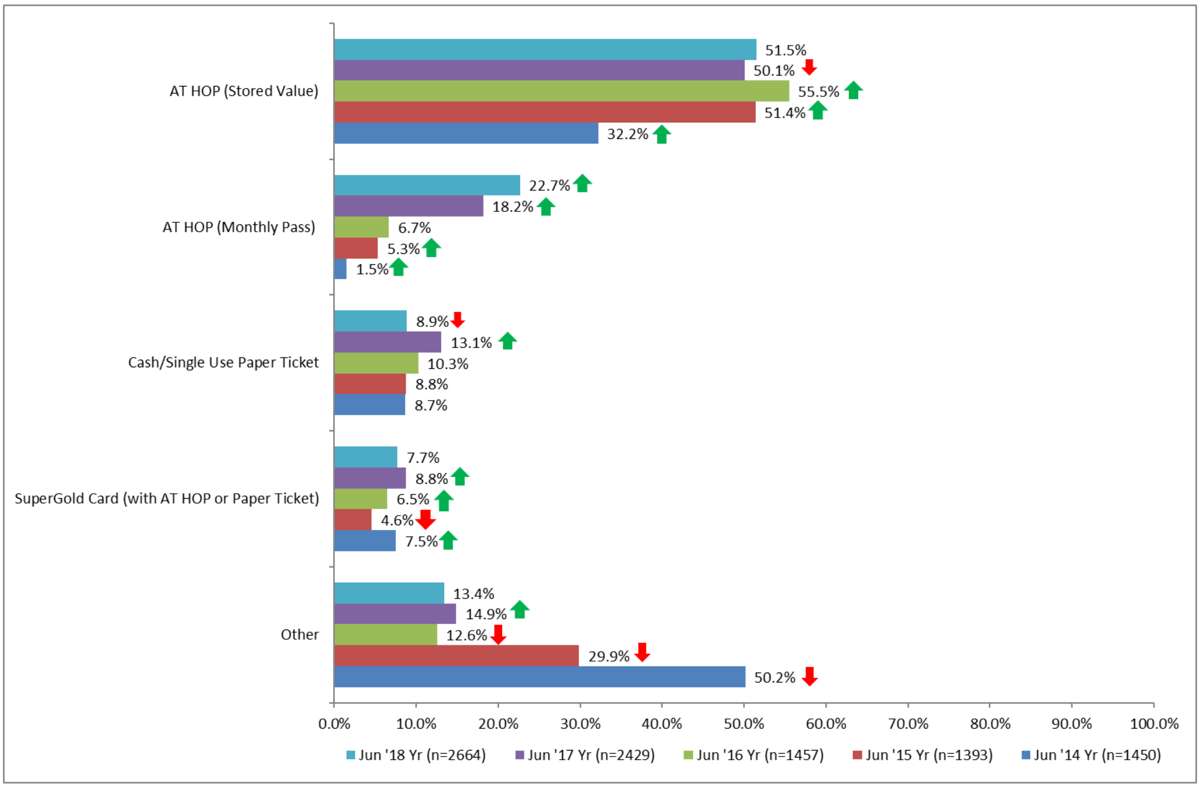
Base: All responses excluding those who did not answer the question or gave a 'not applicable' response. Green Arrow indicates a significant increase from the previous year, red arrow indicates a significant decrease from the previous year.

Ferry

Figure 9.4 shows the type of ticked used by ferry respondents over time.

- Like bus and train respondents, those surveyed on the ferry are also most likely to have paid for their trip using an AT HOP Card – either loaded with stored value (51.5%) or with a monthly pass (22.7%, up significantly from 18.2%). An additional 7.7% used a SuperGold card.
- The share using an AT HOP card shows a year-on-year upward trend since 2014. However, it should be noted that the share of ferry respondents paying by AT HOP Card is lower than on both the train and the bus.

Figure 9.4: Type of Ticket Used – Ferry



Base: All responses excluding those who did not answer the question or gave a 'not applicable' response. Green Arrow indicates a significant increase from the previous year, red arrow indicates a significant decrease from the previous year.

9.8 Passenger Demographics

The following passenger demographic data has been collected for all passengers over time, as well as by mode.

Gender

Table 9.7 illustrates the gender profile of the survey sample for the passengers that completed the survey overall and by mode.

Table 9.7: Gender Split

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=4990)	Jun '15 Yr (n=5809)	Jun '16 Yr (n=7525)	Jun '17 Yr (n=10153)	Jun '18 Yr (n=10272)	Jun '14 Yr (n=1230)	Jun '15 Yr (n=1466)	Jun '16 Yr (n=2003)	Jun '17 Yr (n=2846)	Jun '18 Yr (n=2077)	Jun '14 Yr (n=2375)	Jun '15 Yr (n=3118)	Jun '16 Yr (n=4147)	Jun '17 Yr (n=4931)	Jun '18 Yr (n=5560)	Jun '14 Yr (n=1412)	Jun '15 Yr (n=1269)	Jun '16 Yr (n=1412)	Jun '17 Yr (n=2428)	Jun '18 Yr (n=2681)
Female	54.9%	55.8%	54.8%	56.5%	54.7%	55.1%	54.4%	53.5%	53.9%	52.7%	55.3%	56.6%	55.7%	58.1%	55.7%	49.4%	51.5%	49.9%	48.8%	50.8%
Male	45.1%	44.2%	45.2%	43.5%	45.3%	44.9%	45.6%	46.5%	46.1%	47.3%	44.7%	43.4%	44.3%	41.9%	44.4%	50.6%	48.5%	50.1%	51.2%	49.2%

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

Age

Table 9.8 illustrates the age profile of the survey sample for the passengers that completed the survey overall and by mode.

Table 9.8: Age Profile

	Total					**Train**					**Bus**					**Ferry**				
	Jun '14 Yr (n=5022)	Jun '15 Yr (n=5982)	Jun '16 Yr (n=7750)	Jun '17 Yr (n=10222)	Jun '18 Yr (n=10328)	Jun '14 Yr (n=1244)	Jun '15 Yr (n=1523)	Jun '16 Yr (n=2056)	Jun '17 Yr (n=2861)	Jun '18 Yr (n=2078)	Jun '14 Yr (n=2389)	Jun '15 Yr (n=3203)	Jun '16 Yr (n=4278)	Jun '17 Yr (n=4967)	Jun '18 Yr (n=5599)	Jun '14 Yr (n=1414)	Jun '15 Yr (n=1311)	Jun '16 Yr (n=1443)	Jun '17 Yr (n=2444)	Jun '18 Yr (n=2697)
15-17	4.0%	4.2%	4.3%	**8.3%**	**7.2%**	4.3%	4.0%	4.4%	**6.1%**	5.5%	4.2%	4.6%	4.5%	**9.7%**	**8.2%**	1.7%	0.9%	**1.9%**	1.3%	1.4%
18-24	36.7%	**31.7%**	**33.6%**	**30.8%**	**29.6%**	31.1%	29.6%	31.5%	33.3%	**30.5%**	39.6%	**34.0%**	35.9%	**31.9%**	30.9%	18.3%	**12.6%**	**15.6%**	**12.7%**	12.4%
25-34	24.0%	24.7%	24.7%	24.8%	**26.6%**	27.1%	26.4%	28.1%	27.5%	28.6%	24.1%	25.2%	24.6%	24.4%	**26.6%**	17.0%	15.9%	16.1%	**20.5%**	19.6%
35-44	13.6%	**15.4%**	**13.6%**	12.9%	12.9%	16.2%	17.9%	**13.9%**	12.5%	12.6%	12.4%	14.0%	12.7%	12.2%	12.2%	21.9%	23.9%	22.3%	21.2%	21.5%
45-54	11.0%	11.2%	11.3%	**10.3%**	10.8%	11.7%	11.2%	10.6%	9.3%	10.7%	10.1%	9.9%	10.4%	9.5%	9.8%	20.0%	**24.0%**	22.3%	21.0%	22.0%
55-64	6.9%	8.5%	6.7%	6.2%	**6.9%**	7.1%	8.5%	6.8%	5.8%	6.7%	6.5%	**8.0%**	**6.1%**	5.8%	6.3%	11.2%	**14.4%**	12.9%	11.1%	12.9%
65 +	3.6%	4.3%	**5.8%**	**6.7%**	6.1%	2.6%	2.5%	**4.7%**	5.6%	5.4%	3.2%	**4.4%**	**5.8%**	6.5%	6.0%	9.8%	8.2%	8.9%	12.1%	**10.3%**

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

Location of Residence

Table 9.9 illustrates the location of residence of survey sample for the passengers that completed the survey overall and by mode.

Table 9.9: Location of Residence

	Total					Train					Bus					Ferry				
	Jun '14 Yr (n=2682)	Jun '15 Yr (n=5719)	Jun '16 Yr (n=7421)	Jun '17 Yr (n=9804)	Jun '18 Yr (n=9894)	Jun '14 Yr (n=743)	Jun '15 Yr (n=1516)	Jun '16 Yr (n=2007)	Jun '17 Yr (n=2738)	Jun '18 Yr (n=1996)	Jun '14 Yr (n=1250)	Jun '15 Yr (n=3030)	Jun '16 Yr (n=4068)	Jun '17 Yr (n=4758)	Jun '18 Yr (n=5350)	Jun '14 Yr (n=728)	Jun '15 Yr (n=1263)	Jun '16 Yr (n=1405)	Jun '17 Yr (n=2388)	Jun '18 Yr (n=2631)
In Auckland	95.9%	95.2%	94.8%	94.2%	**95.3%**	98.1%	96.7%	96.0%	95.5%	96.6%	95.4%	94.9%	94.6%	94.2%	**95.3%**	94.6%	95.2%	**93.4%**	**90.1%**	**91.9%**
Elsewhere in NZ	2.2%	2.3%	2.5%	2.5%	2.3%	1.5%	2.1%	2.2%	2.7%	**1.9%**	2.4%	2.3%	2.6%	2.3%	2.3%	2.3%	2.9%	2.7%	3.4%	3.0%
Outside of NZ	1.9%	2.4%	2.7%	**3.3%**	**2.4%**	0.4%	1.2%	1.8%	1.7%	1.6%	2.2%	2.8%	2.8%	3.5%	**2.4%**	3.0%	2.0%	3.9%	**6.5%**	**5.1%**

Base: All responses excluding those who did not answer the question or gave a 'not applicable' response.
Green text indicates a significant increase from the previous year; red text indicates a significant decrease from the previous year.

Appendix One: Questionnaire

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Customer Satisfaction Survey

Please tell us what you like and don't like about public transport to help Auckland Transport make improvement to services.

*If you prefer to complete the survey online, please ask the researcher for the **unique trip number**, then go to www.gravitas.co.nz/at*

For all the questions, except where you need to write in an answer, please circle the appropriate number. If you make an error, cross (X) out the incorrect answer. Please answer every question.

Please hand the form back to the researcher as you exit the vehicle.

	Please write in the suburb/station/wharf:
Q1a Where did you get ON THIS VEHICLE today?	
Q1b Where will you get OFF THIS VEHICLE today?	

Q2a How did you get to the stop/station/wharf where you got on this vehicle today?
Please circle one number only
If you used more than one way to get to the stop/station/wharf, please circle the one you used for the longest distance

1 Walk	2 Car as passenger	3 Cycle	4 Car as driver	5 Bus	6 Train	7 Ferry
8 Other (Please specify):						

Q2b When you get off this vehicle, how will you continue to your destination?
Please circle one number only
If you will use more than one way to get to your destination, please circle the one you will use for the longest distance

1 Walk	2 Car as passenger	3 Cycle	4 Car as driver	5 Bus	6 Train	7 Ferry
8 Other (Please specify):						

Please answer the following questions using the rating scale below

Very dissatisfied → Very satisfied; Unsure/Not applicable

0	1	2	3	4	5	6	7	8	9	10	NA

Q3 How would you rate the stop/station/wharf where you got on this vehicle?
Please circle one number in each row

Cleanliness	0	1	2	3	4	5	6	7	8	9	10	NA
Having enough seats available	0	1	2	3	4	5	6	7	8	9	10	NA
Providing shelter from the weather	0	1	2	3	4	5	6	7	8	9	10	NA
Being easy to get to (by car, walking etc.)	0	1	2	3	4	5	6	7	8	9	10	NA
Personal safety at the stop/station/wharf	0	1	2	3	4	5	6	7	8	9	10	NA
Overall, how satisfied are you with the stop/station/wharf where you got on?	0	1	2	3	4	5	6	7	8	9	10	NA

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Customer Satisfaction Survey

Please answer the following questions using the rating scale below

Very dissatisfied → Very satisfied; Unsure/Not applicable

0	1	2	3	4	5	6	7	8	9	10	NA

Q4 How would you rate the vehicle you are on? *Please circle one number in each row*											
Cleanliness inside the vehicle	0	1	2	3	4	5	6	7	8	9	10	NA
Cleanliness outside the vehicle	0	1	2	3	4	5	6	7	8	9	10	NA
Having enough seats available	0	1	2	3	4	5	6	7	8	9	10	NA
Ease of getting on and off the vehicle	0	1	2	3	4	5	6	7	8	9	10	NA
Your comfort	0	1	2	3	4	5	6	7	8	9	10	NA
Overall, how satisfied are you with the vehicle you are on?	0	1	2	3	4	5	6	7	8	9	10	NA

Q5 How would you rate the service that you are on? *Please circle one number in each row*											
Vehicles arriving and departing on time	0	1	2	3	4	5	6	7	8	9	10	NA
Time taken for the journey	0	1	2	3	4	5	6	7	8	9	10	NA
Personal safety during trip	0	1	2	3	4	5	6	7	8	9	10	NA
Staff friendliness and helpfulness	0	1	2	3	4	5	6	7	8	9	10	NA
Convenience of paying for your trip	0	1	2	3	4	5	6	7	8	9	10	NA
Value for money of this trip	0	1	2	3	4	5	6	7	8	9	10	NA
Overall, how satisfied are you with this service?	0	1	2	3	4	5	6	7	8	9	10	NA

Q6 How would you rate the information available? *Please circle one number in each row*											
Information about routes and timetables	0	1	2	3	4	5	6	7	8	9	10	NA
Information about how to pay for your trip	0	1	2	3	4	5	6	7	8	9	10	NA
Information about delays and disruptions	0	1	2	3	4	5	6	7	8	9	10	NA
Overall, how satisfied are you with information available?	0	1	2	3	4	5	6	7	8	9	10	NA

Q7 How would you rate public transport (including trains, buses & ferries) in the Auckland region? *Please circle one number in each row*											
Directness of services	0	1	2	3	4	5	6	7	8	9	10	NA
Route coverage (e.g. number of places you can go)	0	1	2	3	4	5	6	7	8	9	10	NA
Ease of transfer between services (e.g. bus to bus, or train to ferry)	0	1	2	3	4	5	6	7	8	9	10	NA
How often services run	0	1	2	3	4	5	6	7	8	9	10	NA
Operating hours of services	0	1	2	3	4	5	6	7	8	9	10	NA
How complaints are handled and solved	0	1	2	3	4	5	6	7	8	9	10	NA
Overall, how satisfied are you with the public transport system?	0	1	2	3	4	5	6	7	8	9	10	NA

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Customer Satisfaction Survey

Q8 How likely or unlikely would you be to recommend this trip to others?
Please circle one number in the rating scale below

Very unlikely										Very likely	Unsure/Not applicable
0	1	2	3	4	5	6	7	8	9	10	NA

Q9a How frequently do you travel by bus, train or ferry? *Please circle one number*

1 Less than Monthly/ This is the first time	2 Monthly to Weekly	3 2 to 4 days per week	4 5 days per week or more

Q9b Which describes your preference about public transport?

1 I would like to use it more	2 I am happy with my use	3 I would like to use it less/ only use it if I have to

Q10 What sort of ticket do you have for this trip? *Please circle all that apply*

1 AT HOP card Stored Value	2 AT HOP card Monthly Pass	3 Cash/Single use paper ticket	4 SuperGold Card
5 Other (Please specify):			

Q11 What are the reasons for making this trip today? *Please circle all that apply*

1 Work	2 Tertiary education (e.g. University / Polytech)	3 School (Years 9-13)	4 Shopping
5 Personal business / medical	6 Entertainment / socialising/ sightseeing	7 Other *(Please specify):*	

Q12 Was a vehicle (car / van / ute / motorcycle) available for you to make this trip today?

1 Yes, as a driver	2 Yes, as a passenger	3 No (***go to Q14***)

Q13 What is the main reason for using public transport for today's trip?

1 Parking hard to find / too expensive	2 Cost of fuel / running vehicle too expensive	3 Quicker than alternatives
4 Want to be socially responsible	5 More convenient/easier than alternatives	6 Avoid congestion
7 Less stressful than alternatives	8 Other *(Please specify):*	

Q14 Do you have an AT HOP Card?

1 Yes	2 No, but I do intend to get one
3 No, and I do not intend to get one	4 I don't know this card

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Customer Satisfaction Survey

Q15 What is ONE thing you could suggest to improve Auckland's public transport services and encourage you to use public transport more?

Q16 Are you?	1 Male	2 Female

Q17 Which age group are you in?			
1 15 – 17 years	2 18 – 24 years	3 25 – 34 years	4 35 – 44 years
5 45 – 54 years	6 55 – 64 years	7 65 years or over	

Q18 Do you live:	1 In Auckland	2 Elsewhere in NZ	3 Outside NZ

Win an Apple iPod Touch OR one of five $50 Gift Vouchers

5x $50
Gift Vouchers

To be in the draw to win an **Apple iPod Touch OR one of five $50 gift vouchers**, please provide your name and a contact number.
Your personal details will be kept confidential and will NOT be used for marketing purposes.

Name:	☐ I wish to enter the prize draw
Email:	☐ I am happy for Auckland Transport to contact me for further research via email
Contact Phone:	

Thank you for your time. **Please hand your survey form and pen back to the researcher when you leave the vehicle.**

If you have any questions, queries or comments about this survey please feel free to email **info@gravitas.co.nz**

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