

Barriers to off peak bus usage

Prepared for: Waikato Regional Council

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EXECUTIVE SUMMARY

This research was commissioned by Waikato Regional Council to investigate barriers to bus usage amongst potential off peak audiences. Those residents of particular interest were:

- University/WINTEC students
- Older 'time rich' residents (predominantly gold card users)
- Young families who are out and about
- Retail workers and shoppers

A total of 871 interviews were completed between the 21st of October and the 10th of November 2013. Interviews were completed at different locations across Hamilton including shopping areas, recreation areas, the university, WINTEC and public libraries.

A summary of the main statistics is provided in Table A below.

Overall the findings show a relatively positive attitude to the bus service amongst both users and non users with ease of use and perceptions of an excellent service the primary drivers of these impressions. The primary barrier to usage appears to be access to car although specific barriers of cost and frequency of service were also mentioned.

Specific barriers were also identified for each target audience. For students issues with cost and single hour fares present the greatest barrier while caregivers feel using the bus with children is particularly difficult. Retail workers/shoppers appear hampered by the limited breadth of the service, while older residents require more stops for easier access to the service.

Table A: Summary of key statistics from user groups

	Current users	Lapsed users	Non users
Rationale for using/not using the bus	<ul style="list-style-type: none"> • 42% the bus is easy to use • 40% no car available 	<ul style="list-style-type: none"> • 71% have access to a car • 27% bus is inconvenient • 16% prefer walking/cycling • 13% circumstances changed/ no longer need the bus 	<ul style="list-style-type: none"> • 83% prefer the car • 22% inconvenient • 16% bus is not easily accessible
Alternative modes of transport	<ul style="list-style-type: none"> • 55% private car • 52% walking 	<ul style="list-style-type: none"> • 89% private car • 23% walking 	<ul style="list-style-type: none"> • 93% private car • 34% walking
Rating of bus service (1 – 10 scale)	<ul style="list-style-type: none"> • 62% 8 – 10 • 36% 5 – 7 • 1% 1 – 4 	<ul style="list-style-type: none"> • 48% 8 – 10 • 45% 5 – 7 • 5% 1 – 4 • 1% don't know 	<ul style="list-style-type: none"> • 27% 8 – 10 • 43% 5 – 7 • 11% 1 – 4 • 18% don't know
Positive impressions driven by...	Limited issues with the service, generally feel the service provided is excellent. Positive impressions of the drivers.	Positive impressions of the driver, perceptions that the buses are on punctual and that the service is excellent.	Positive word of mouth from friends, impressions of that the service is excellent.
Negative impressions driven by...	Infrequency of buses and wait times between services, negative driver attitudes.	Negative driver attitudes, impressions of lateness and infrequency of service.	Negative word of mouth from friends, infrequent services, negative impressions of the drivers' attitudes and driving.
Improvements/motivators for increased usage (note: excludes mentions of 'nothing' and 'if car was not an option')	<ul style="list-style-type: none"> • 14% improved frequency • 14% fare reduction • 9% improvement in driver attitude 	<ul style="list-style-type: none"> • 20% fare reduction • 10% improved frequency 	<ul style="list-style-type: none"> • 10% fare reduction • 9% improved frequency • 9% increase in the number of stops

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1 PROJECT OVERVIEW

As part of their role in Hamilton City, Waikato Regional Council is responsible for administering the bus service throughout the urban areas. Although peak patronage levels are high, WRC is interested in ways to increase off-peak¹ patronage. WRC is particularly interested in targeting residents who are most likely to use the bus service in off-peak times, specifically:

- University/WINTEC students
- Older 'time rich' residents (predominantly gold card users)
- Young families who are out and about
- Retail workers and shoppers

Thus, the primary objective of the research is to understand the motivators and barriers for each target audience with regards to using the bus service in Hamilton.

1.1 Method

The project utilised a quantitative survey and a total of 871 face to face interviews were completed across the target audiences between 21st of October and the 10th of November. This sample is comprised of 215 students, 200 caregivers, 255 retail workers/shoppers and 201 older people.

Interviewing was undertaken in off peak hours only and was completed at a range of locations across Hamilton. Locations used for interviewing are listed below along with the number of interviews completed at each location for each audience:

Table 1-1 Interviews achieved across locations

Location	Total	Students	Caregivers	Retail workers/shoppers	Older people
Retail areas and stores, e.g., central city, The Base, Chartwell, Warehouse etc.	498	26	88	255	129
Uni/WINTEC	189	189	0	0	0
Recreational areas, e.g., Hamilton Lake, Hamilton Gardens	114	0	92	0	22
Libraries	70	0	20	0	50
TOTAL	871	215	200	255	201

¹ Off-peak is between 9am and 3pm weekdays and all weekend.

1.2 Questionnaire

The questionnaire was designed by Versus Research in conjunction with WRC. A copy of the questionnaire is contained in Appendix One.

A pilot survey of n=30 interviews was completed on the 14th of October to check questionnaire flow and to ensure any potential areas for confusion were eliminated before commencing the main fieldwork stage. Pilot interviewing was completed in Hamilton Central only; no significant changes were made to the questionnaire as a result of the pilot testing.

1.3 Analysis and reporting

Results are reported at the total level and at the target audience level.

Significance testing has been applied to those groups with more than n=30 respondents. Significance testing is used to determine whether the difference between two results is statistically significant or not, i.e., to determine the probability that an observed difference occurred as a result of chance.

This test shows the differences between the proportions (also known as a Z test) and compares the results for the respondents in each target audience with all other respondents who are not in that target audience. Testing is completed at the 90% and 95% confidence levels and differences are indicated in the document via red or green font:

- **Green font** indicates that a result for a target audience is significantly greater than the result for the total.
- **Red font** indicates that a result for a target audience is significantly lower than the result for the total.

2 Sample

The total sample achieved for the survey (n=871) provides an overall margin of error of +/- 3.32% at the 95% confidence interval. The margin of error associated with each group is provided below.

Table 2-1 Margin of error for target audience groupings

Target Audience	Students	Caregivers	Retail workers/ shoppers	Older people
Sample size	215	200	255	201
Margin of Error (@ 95% confidence interval)	+/-6.7%	+/-6.9%	+/-6.1%	+/-6.9%

2.1 Sample profile

A demographic summary of each target audience is provided below; a full profile is provided in Appendix Two.

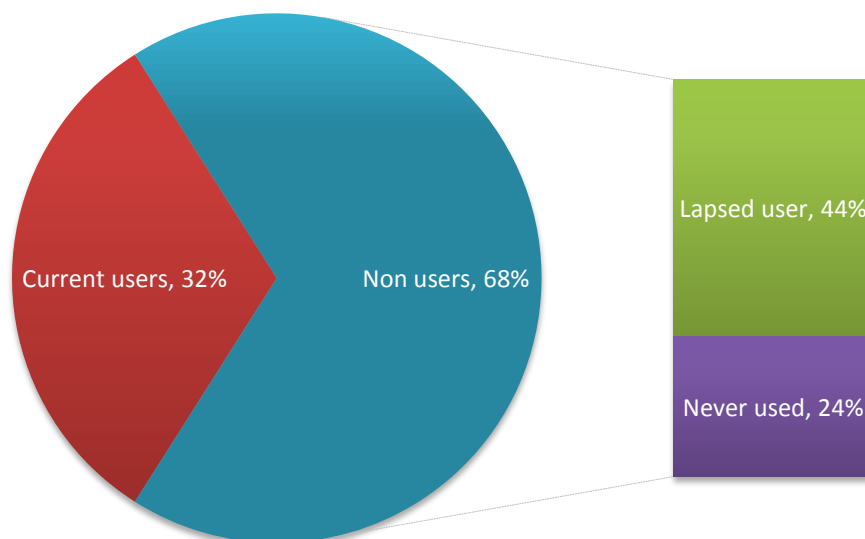
Table 2-2 Summary profile of respondents

Audience	Students	Caregivers	Retail workers/shoppers	Older people
Description	Students attending either University or WINTEC (majority University)	Caregivers and parents with young families	Combination of those working in retail and those shopping (majority interviewed over the weekend)	Older time rich residents, retired or semi-retired, out and about during off peak hours.
Age	72% under the age of 24	78% aged between 25 and 44	Even spread of ages from 18 to 60 years	81% aged 60+
Household situation	44% in a flat with others, further 21% living as a single/couple with no children	62% living in a household with mainly pre-school children	67% have children at home (pre-school to adults)	85% single/couple no children at home
Income	65% household income of \$30k or less	Even income spread although this group have a higher proportion of household income over \$120k	61% household income under \$80k	41% household income under \$60k, 34% refused to provide answer to income question
Gender	Even gender split (46% male, 54% female)	80% of respondents were female	65% of respondents were female	Even gender split (41% male, 59% female)

2.2 Bus usage

Of the 871 respondents interviewed, 32% currently use the bus while 68% did not use the bus. The non users' profile can be further broken down as 44% had previously used the bus (lapsed users) and 24% had never used the bus service.

Figure 2-1 Bus usage profile



When viewed by target audience, caregivers are the least likely to use the bus and have the highest number of lapsed users. Older people are the most likely group to use the bus and have the lowest number of lapsed users.

Table 2-3 Bus usage profile by target audience

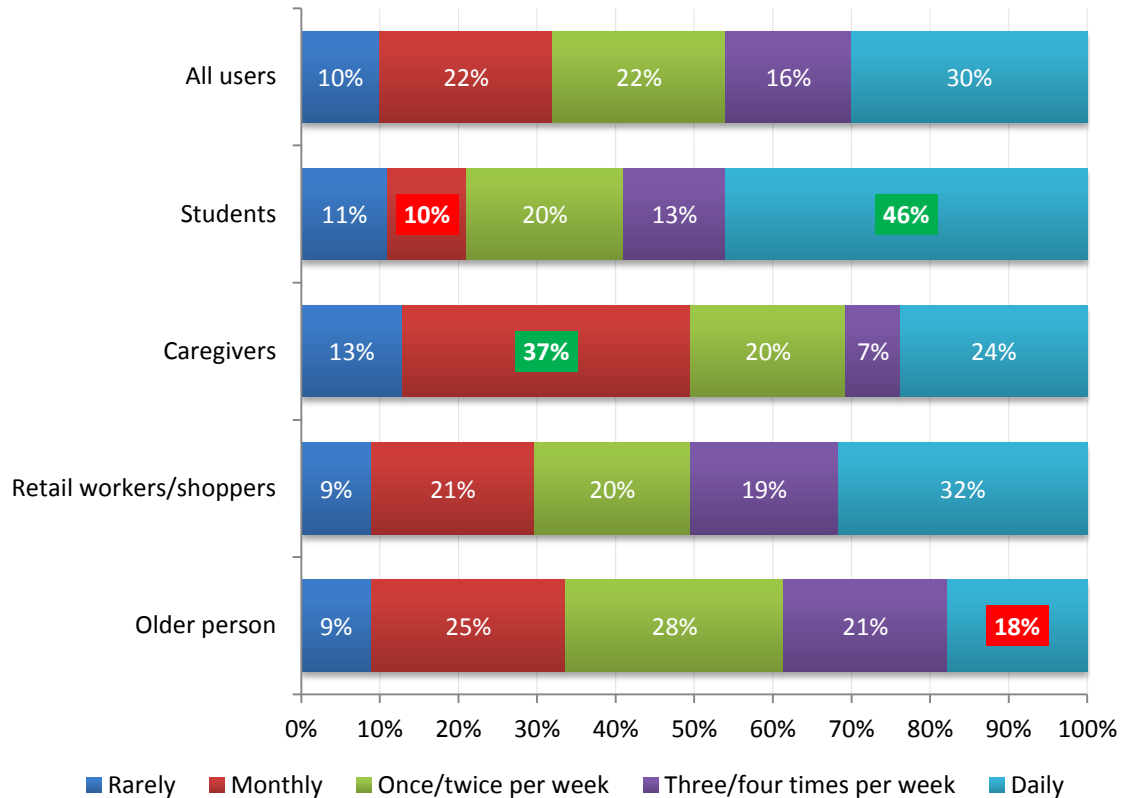
	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Current users	33	23	32	40
Total non usage	67	77	68	60
Lapsed users	47	50	45	32
Never used	20	27	23	28

The remainder of the document analyses the results in terms of current, lapsed and non users' responses, where possible differences across the target audiences are noted.

3 FEEDBACK FROM BUS USERS

Of those who use the bus service in Hamilton, 30% use this service daily, 16% use it three to four times a week and 22% use it once a week. Students are the most frequent users with 46% using the service daily. Caregivers tend to use the service less often with half of caregivers using this service monthly or less often.

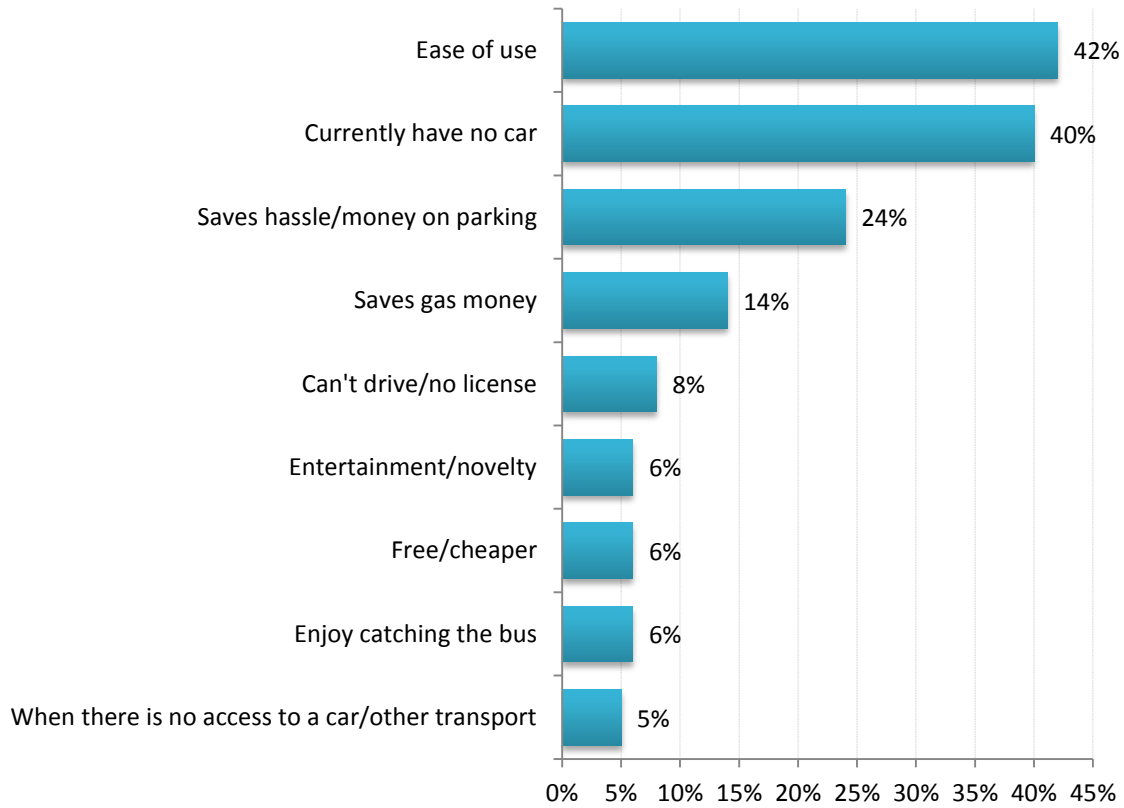
Figure 3-1 Frequency of bus usage²



² How often do you use the bus service? All users n=277, Students n=70, caregivers n=46, retail workers/shoppers n=81, older people n=80.

The primary reasons for using the bus service are the ease of use (42%) and the lack of access to a car (40%). Benefits of reducing hassles associated with parking (24%) and gas (14%) are also mentioned.

Figure 3-2 Reason for using the bus³



³ Why do you choose to use the bus? All users n=277.

Students who use the bus do so predominantly because it is easy to use (47%) and they do not currently have access to a car (51%) while caregivers are more likely to use the service for the novelty factor (22%). Both caregivers and students are less likely to use the bus service because of monetary savings (14% and 11% respectively).

Retail workers and shoppers use the bus for ease of use (43%) or lack of access to a car (37%) but are more likely to state that they feel the service saves money (31%). This aspect also holds true for older people who are more likely to cite monetary savings as a reason for using the bus service (33% saves money, 20% saves gas money and 14% free).

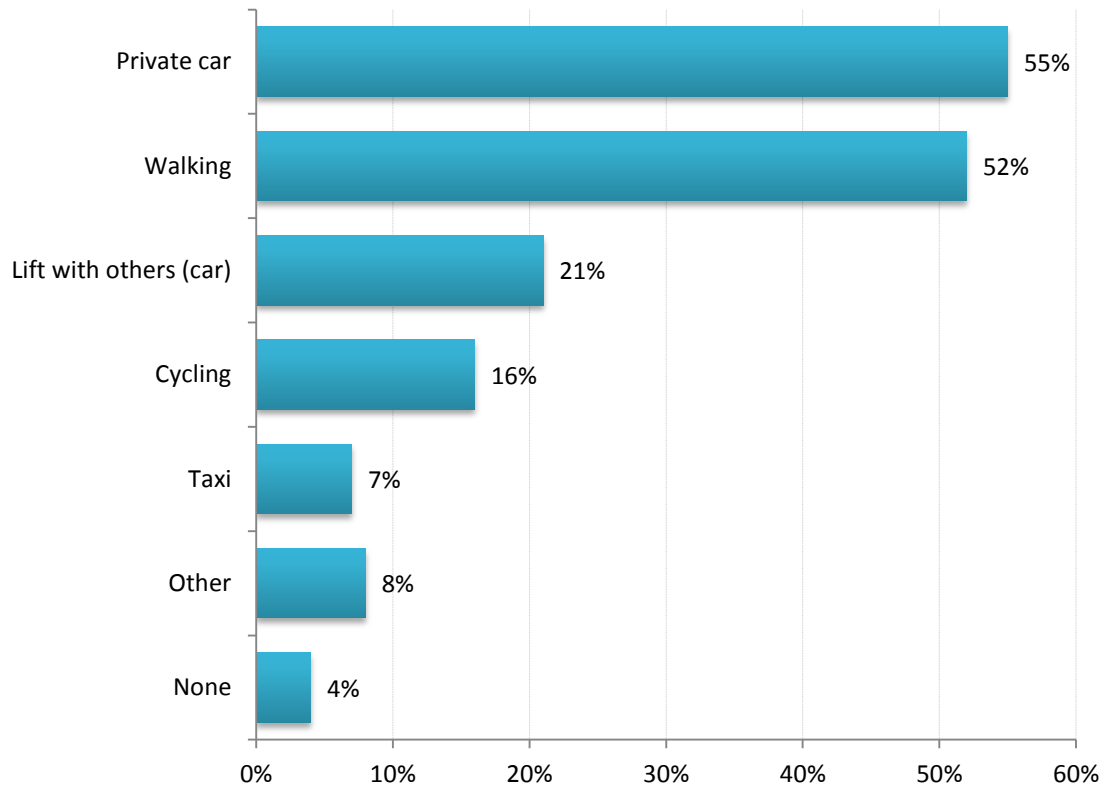
Table 3-1 Reason for using the bus by target audience⁴

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Ease of use	47	26	43	44
Currently have no car	51	39	37	34
Saves hassle/money on parking	14	11	31	33
Saves gas money	14	9	10	20
Can't drive/no license	9	2	11	8
Enjoy catching the bus	6	9	5	6
Free/cheaper	3	2	4	14
Entertainment/novelty	1	22	2	4
When there is no access to a car/other transport	3	7	10	1

⁴ Why do you choose to use the bus? Students n=70, caregivers n=46, retail workers/shoppers n=81, older people n=80.

The primary alternative mode of transport used by bus users is a private car (55%) or walking (52%). Just over one fifth will get a lift with another person and 16% will cycle.

Figure 3-3 Other modes of transport used⁵



Alternative modes of transport are fairly consistent across the target audiences, however caregivers are more likely to use a private car (70%) as an alternative where as students are less likely to do so (36%).

Table 3-2 Other modes of transport used by target audience⁶

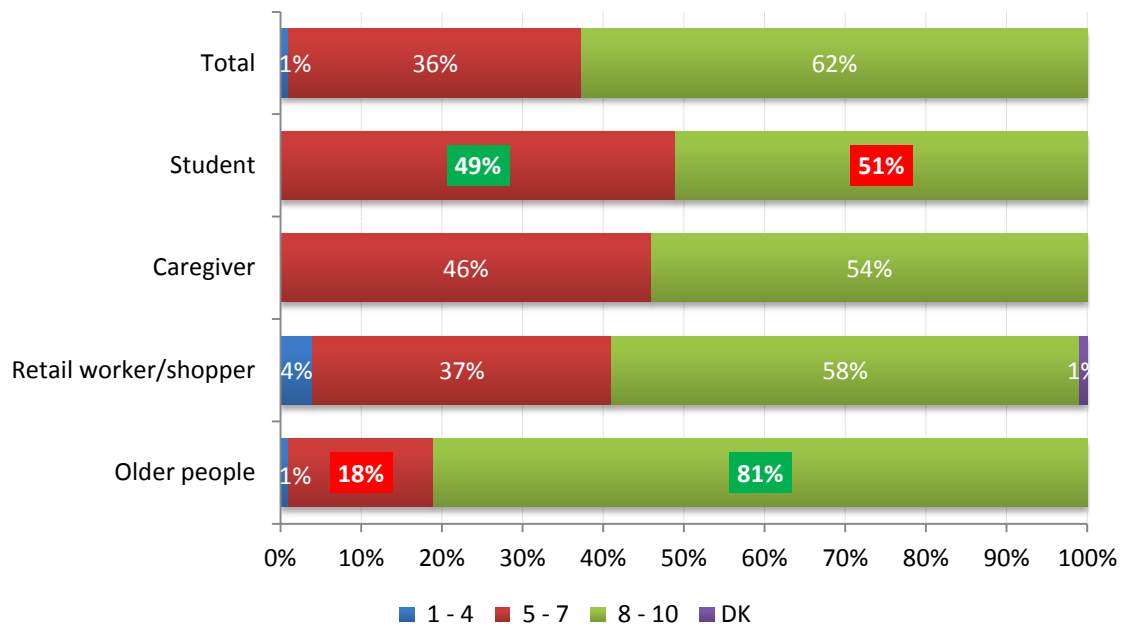
	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Private car	36	70	54	63
Walking	54	50	46	58
Lift with others (car)	23	13	27	16
Cycling	20	17	12	14
Taxi	3	9	9	9
Other	10	11	4	8
None	6		5	4

⁵ Aside from the bus what other modes of transport, if any, do you use? All users n=277.

⁶ Aside from the bus what other modes of transport, if any, do you use? Students n=70, caregivers n=46, retail workers/shoppers n=81, older people n=80.

Bus users' rating of the service is reasonably high with 62% rating the service between 8 and 10 out of 10. Student users are more likely to rate the service lower with only 51% rating the service between 8 and 10 out of 10 while older users will rate the service higher (81% rating the service between 8 and 10 out of 10).

Figure 3-4 Rating of service⁷

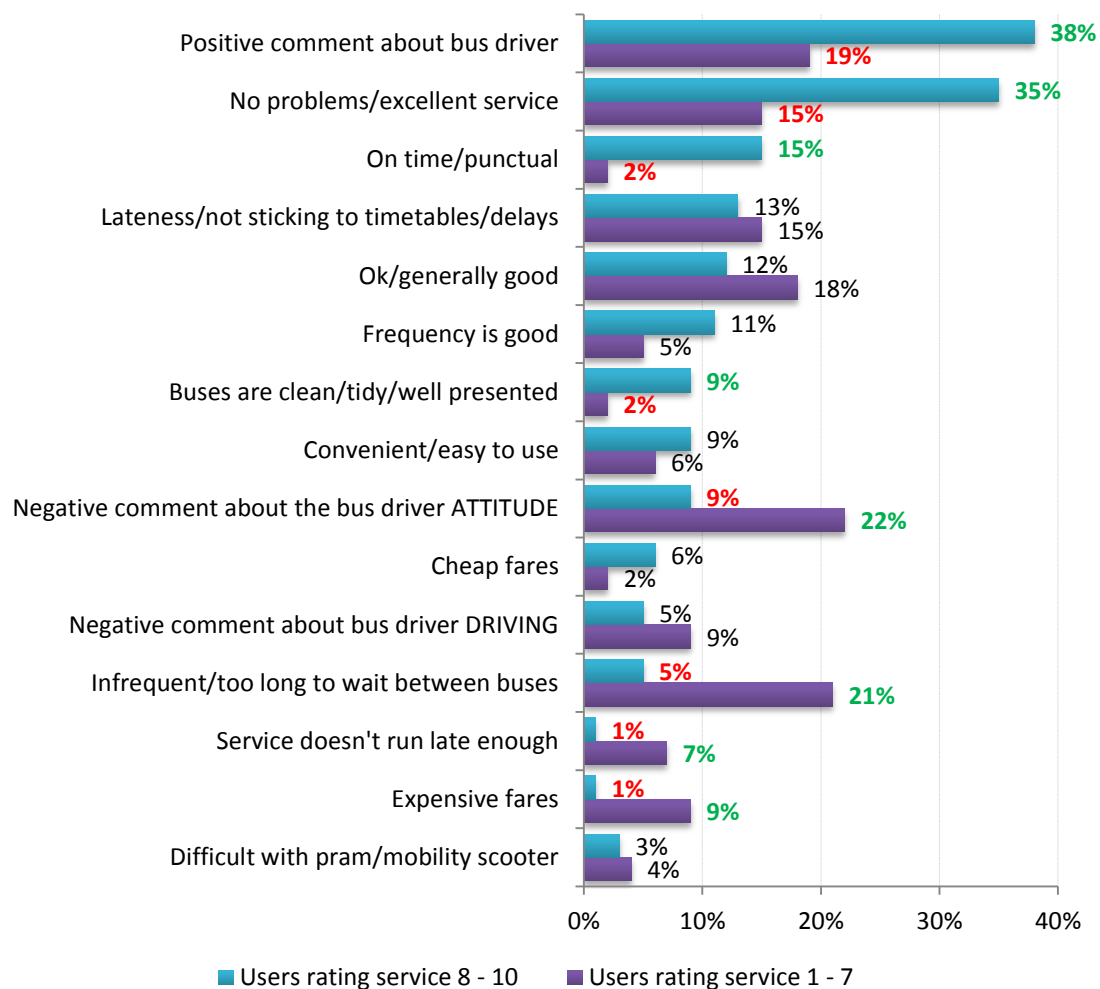


⁷ Based on your experience, on a scale of 1 to 10, where 1 is very poor service and 10 is excellent service, how would you rate the Hamilton bus service? All users n=277, Students n=70, caregivers n=46, retail workers/shoppers n=81, older people n=80.

Users who rate the service between 8 and 10 out of 10 predominantly state positive comments about the bus driver (38%) and have limited problems with the service provided (35%). They are also more likely to state that the service is punctual (15%) and the bus is well presented (2%).

Those users who provide a lower service rating (between 1 and 7 out of 10) are less likely to provide positive comments about the driver, the service, timings and bus presentation. Instead this group are more likely to indicate negative comments about the driver attitude (22%), to state that the delay between the buses is too long (21%), that the service doesn't run late enough (7%) and that the fares are expensive (9%).

Figure 3-5 Service rating reason⁸



⁸ What makes you say that? Users 1 – 7 n=103, Users 8 – 10 n=173.

Students appear less likely to state that there are no problems with the service (17%) and are more likely to indicate that the buses run late (24%) and to provide a negative comment about drivers' attitudes (26%). Students are also more likely to state that the service frequency is an issue (only 3% state the frequency is good). Caregivers are more likely to state that they find using the bus difficult with a pram (17%) while retail workers are more likely to say that the service doesn't run late enough (6%).

Older people appear generally more satisfied and are more likely to state that the frequency of the service is good (15%) and that they have had no problems with the service (41%). This group are also less likely to provide a negative comment about the drivers' attitudes (5%).

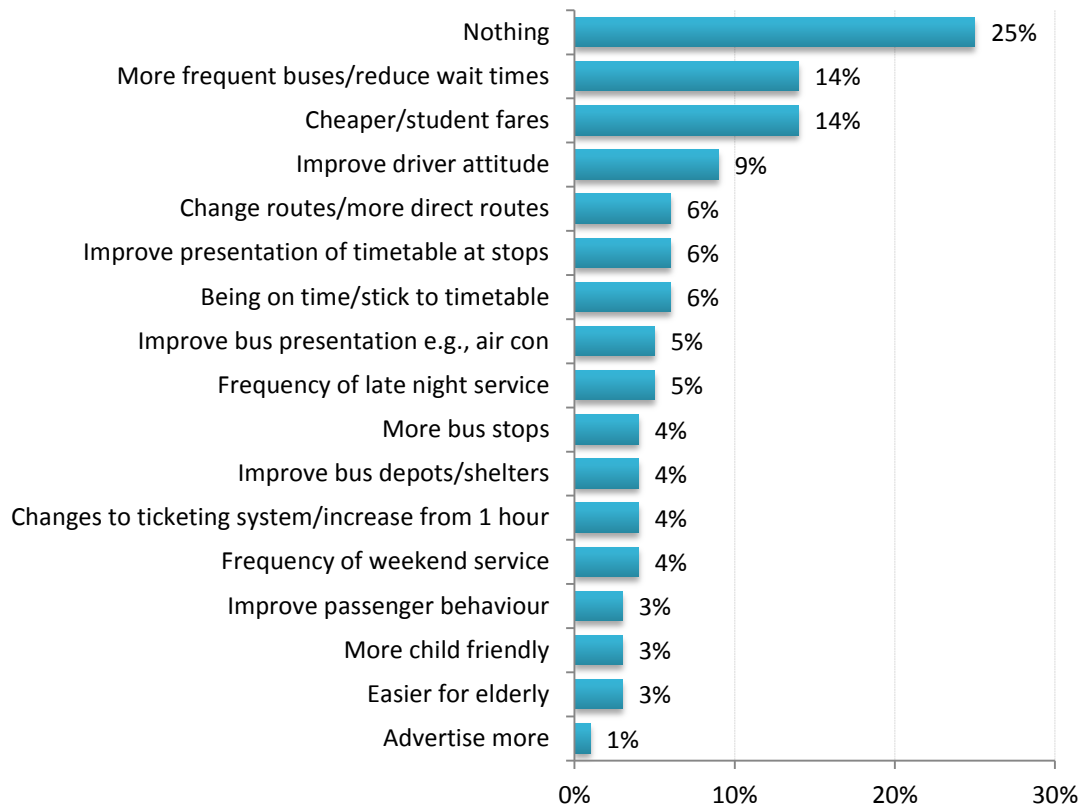
Table 3-3 Service rating reason by target audience⁹

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Positive comment about bus driver	29	28	37	29
No problems/excellent service	17	24	25	41
On time/punctual	9	9	7	15
Lateness/not to timetable/delays	24	11	9	10
Ok/generally good	13	13	19	13
Frequency is good	3	11	6	15
Negative comment about the bus driver ATTITUDE	26	15	12	5
Convenient/easy to use	6	4	9	11
Buses are clean/tidy/well presented	3	9	9	6
Cheap fares	3	0	1	11
Infrequent/too long to wait between buses	14	9	11	10
Negative comment about bus driver DRIVING	9	4	6	6
Expensive fares	7	4	5	0
Service doesn't run late enough	1	0	6	3
Difficulty with pram/mobility scooter	0	17	1	0

⁹ What makes you say that? Students n=70, caregivers n=46, retail workers/shoppers n=81, older people n=80.

Overall, 25% of current users do not feel that there were any changes required to the current bus service. More frequent buses and cheaper fares are the most commonly mentioned items overall (14% each), followed by improved driver attitude (9%), more direct routes, improved information at bus stops and improved timeliness (all 6% each). All other mentions register less than 5% of the total mentions.

Figure 3-6 Service improvements¹⁰



¹⁰ What is the one thing you would suggest to improve the bus service in Hamilton? All users n=277.

Few differences occur between the target audience groupings. Students are more likely to request cheaper fares (24%) while caregivers are more likely to request more child friendly service (13%).

Older people are more likely to state that they would like more bus stops (10%) and that the service should be easier for the elderly (6%). However, this group are also the least likely to suggest any changes with 40% indicating that nothing needs to change to the current service.

Table 3-4 Service improvements by target audience¹¹

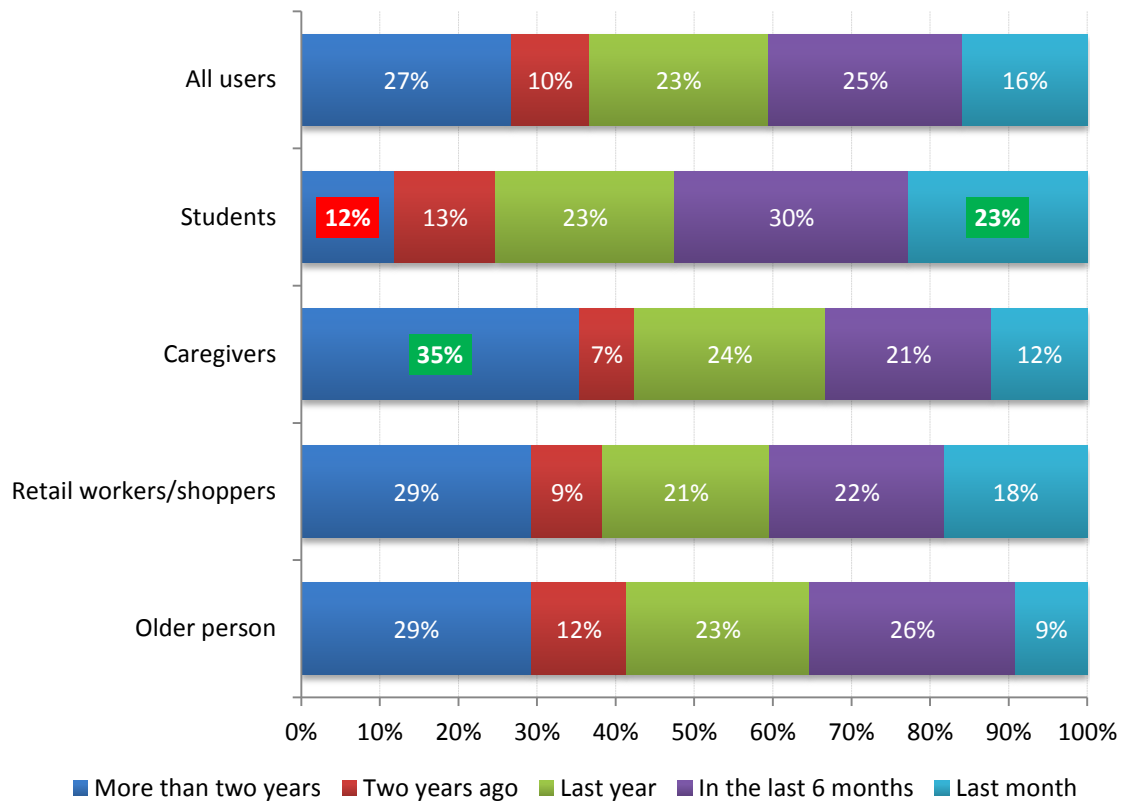
	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Nothing	17	20	21	40
Cheaper/student fares	24	20	14	4
More frequent buses/reduce wait times	20	13	14	9
Improve driver attitude	10	9	10	8
Being on time/stick to timetable	7	2	10	5
Improve presentation of timetable at stops	9	9	7	3
Change routes/more direct routes	3	11	5	9
Frequency of late night service	9	0	7	4
Improve bus presentation e.g., air con	4	4	9	3
Frequency of weekend service	6	0	5	4
Changes to ticketing system/increase from 1 hour	6	4	4	3
Improve bus depots/shelters	0	7	4	5
More bus stops	0	0	2	10
Easier for elderly	0	2	2	6
More child friendly	0	13	1	0
Improve passenger behaviour	1	0	1	6
Advertise more	0	4	1	0

¹¹ What is the one thing you would suggest to improve the bus service in Hamilton? Students n=70, caregivers n=46, retail workers/shoppers n=81, older people n=80.

4 FEEDBACK FROM LAPSED USERS

Forty-one per cent of lapsed users used the bus service in the last 6 months, 23% used it within the last year (to six month) and 37% last used the service more than a year ago. Students appear to be the most recent user group with 23% having used the service in the last month while caregivers are less likely to have used the service recently (35% last used it more than two years ago).

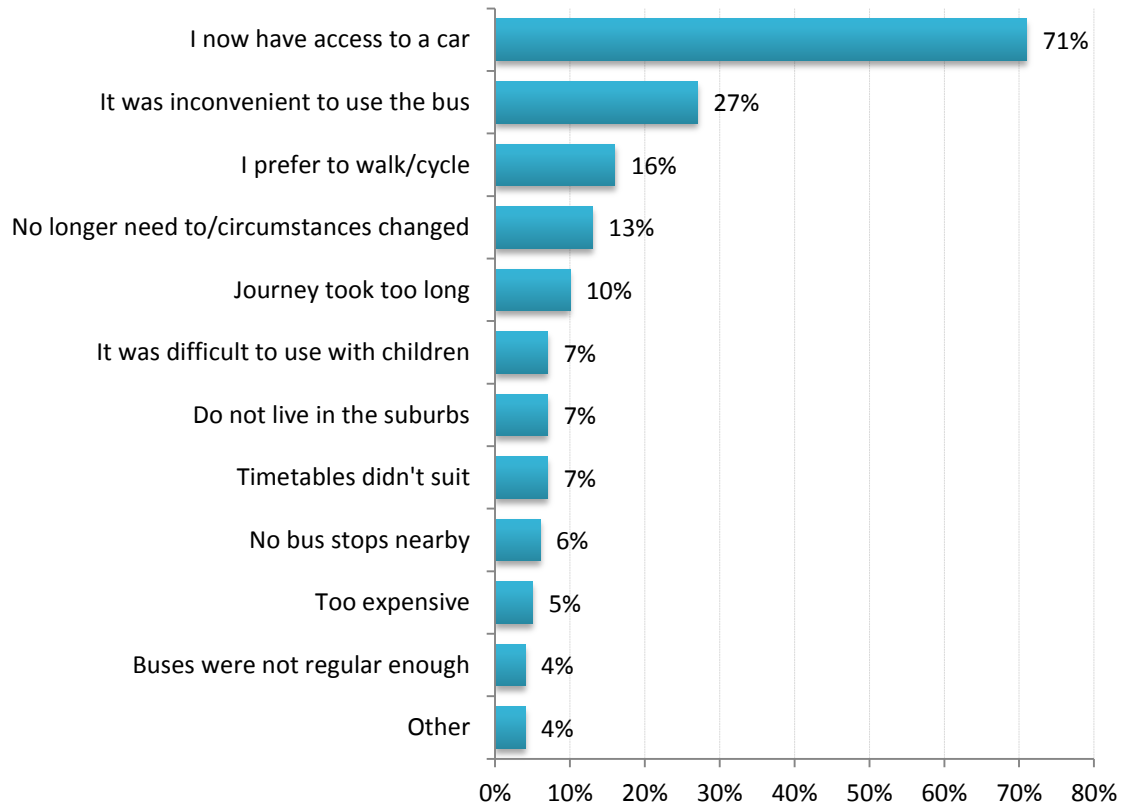
Figure 4-1 Previous use¹²



¹² When did you last use the bus in Hamilton? All lapsed users n=382, students n=102, caregivers n=99, retail workers/shoppers n=116, older people n=65.

The primary reason people no longer use the bus is that they now have access to a car (71%) and that they found it inconvenient to use the bus (27%). This is followed by a number of smaller reasons ranging from a preference for cycling (16%) to the irregularity of buses (4%).

Figure 4-2 Reason for no longer using the bus¹³



¹³ Why do you no longer use the bus? All lapsed users n=382.

Reasons for no longer using the bus are fairly consistent across the different target audiences with access to a car and the bus being inconvenient the top two reasons for all groups.

However, caregivers are more likely to state that they found the service difficult to use with children (20%) and are less likely to say that they prefer walking/cycling (7%) or that they no longer need the bus (7%). In comparison retail workers/shoppers are more likely to state that their circumstances changed resulting in them no longer needing to use the bus service (19%) and/or that they do not live in the suburbs where buses are easily accessible (12%).

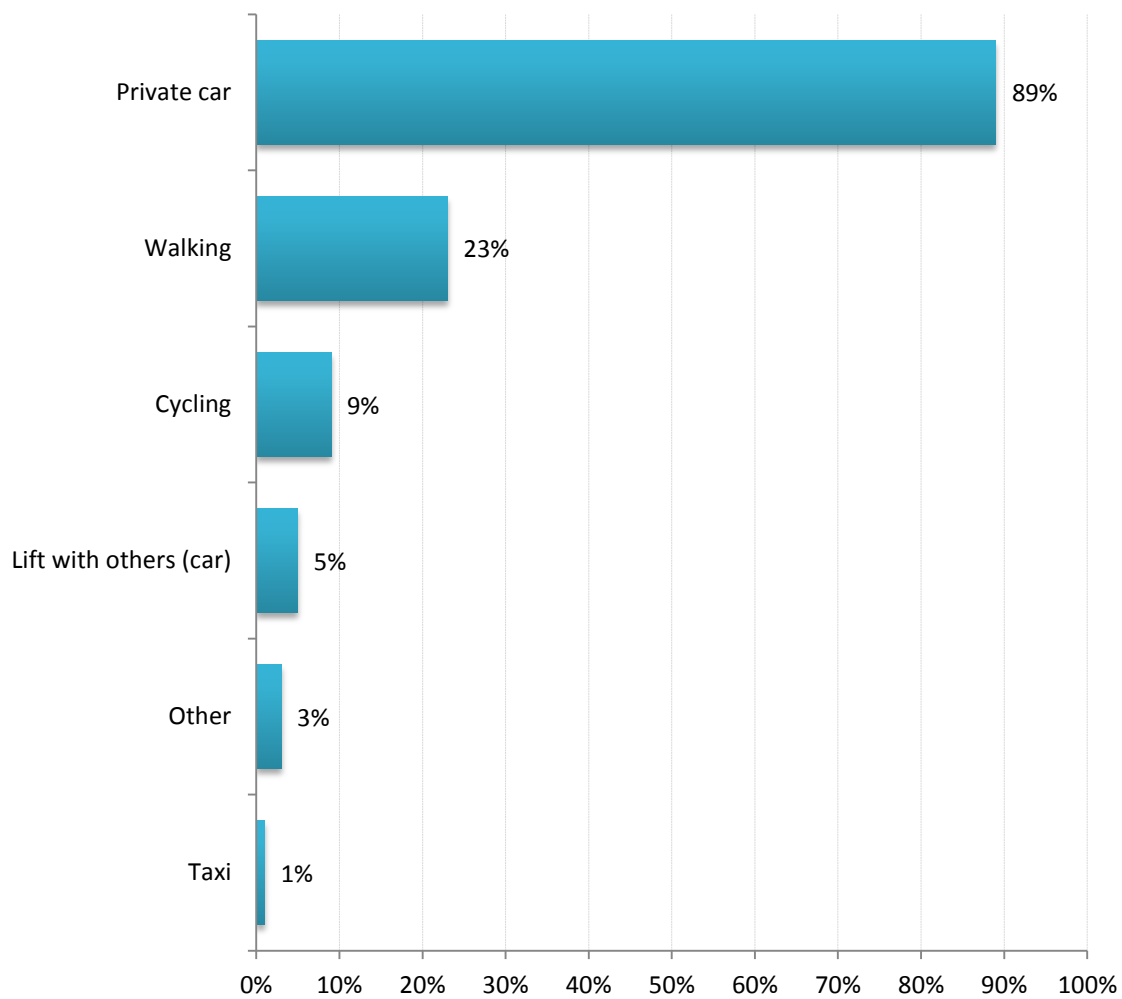
Table 4-1 Reason for no longer using the bus by target audience¹⁴

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
I now have access to a car	75	78	65	66
It was inconvenient to use the bus	31	24	27	23
I prefer to walk/cycle	22	7	16	20
No longer need to/circumstances changed	15	7	19	8
Journey took too long	10	8	13	6
Timetables didn't suit	8	6	9	6
Do not live in the suburbs	1	9	12	3
It was difficult to use with children	1	20	3	2
No bus stops nearby	3	6	9	6
Too expensive	9	4	3	8
Buses were not regular enough	3	4	6	3
Other	4	1	6	8

¹⁴ Why do you no longer use the bus? Students n=102, caregivers n=99, retail workers/shoppers n=116, older people n=65.

The main alternative modes of transport for lapsed users are a private car (89%) or walking (23%).

Figure 4-3 Other modes of transport used¹⁵



Students are less likely to access a private car as an alternative mode of transport (80%) and are more likely to get a lift with other people (10%). Caregivers are more likely to use a private car instead of the bus (96%) and are less likely to walk (10%) or cycle (4%).

Table 4-2 Other modes of transport used by target audience¹⁶

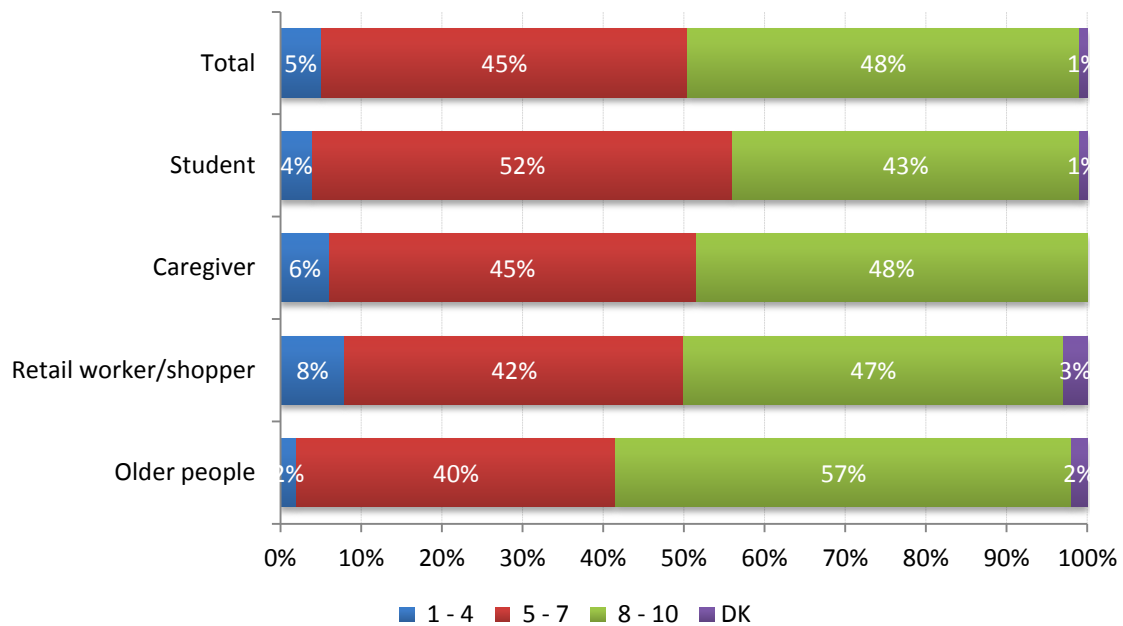
	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Private car	80	96	91	89
Walking	27	10	28	28
Cycling	10	4	12	11
Lift with others (car)	10	1	5	6
Other	6	1	5	
Taxi			1	2

¹⁵ What transport do you use instead? All lapsed users n=382.

¹⁶ What transport do you use instead? Students n=102, caregivers n=99, retail workers/shoppers n=116, older people n=65.

Forty-eight per cent of lapsed users rate the bus service between 8 and 10 out of 10, 45% rate it between 5 and 7 out of 10 and 5% rate it between 1 and 4 out of 10. Service ratings are fairly consistent across the target audiences with older people appearing slightly more satisfied with the service (although not significantly so).

Figure 4-4 Rating of service¹⁷

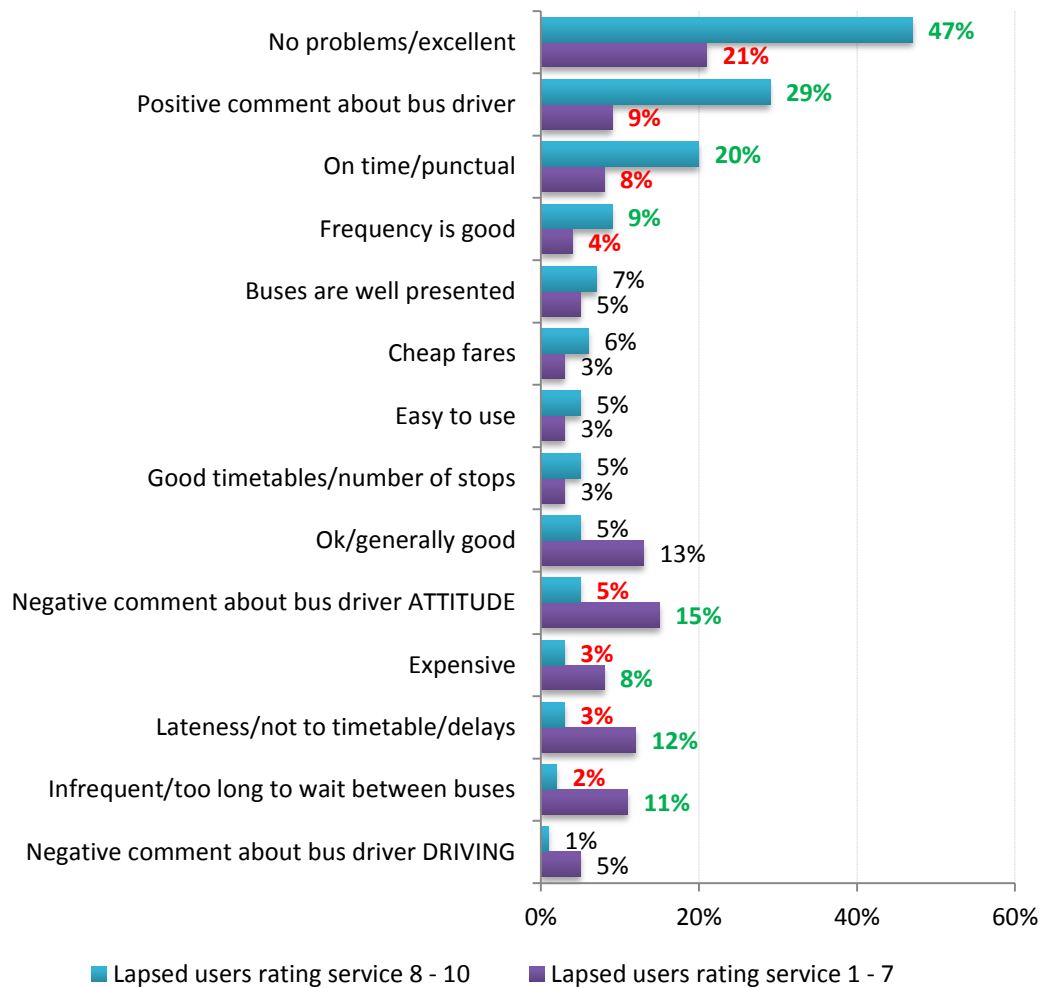


¹⁷ Based on your experience, on a scale of 1 to 10, where 1 is very poor service and 10 is excellent service, how would you rate the Hamilton bus service? All lapsed users n=382, students n=102, caregivers n=99, retail workers/shoppers n=116, older people n=65.

Those who rated the service between 8 and 10 out of 10 are more likely to state that they have no problems with the service (47%), to make positive comments about the driver (29%) and to say that the service is punctual (20%).

In comparison, those who rate the service lower are more likely to state that the service is 'ok' (13%), to make a negative comment about the drivers' attitudes (15%), to say that the service is expensive (8%) and to indicate issues with lateness (12%) or infrequency (11%).

Figure 4-5 Service rating reason¹⁸



¹⁸ What makes you say that? Lapsed users 1 – 7 n=193, lapsed users 8 – 10 n=184.

There are limited differences between the target audiences' responses for the service rating provision. Students appear less likely to make a positive comment about the bus driver (12%) and are more likely to indicate issues with lateness (13%) and wait times (15%).

Retail workers are more likely to state that the service is easy to use (7%) but are less likely to state that the fares are cheap (1%). Older people appear more positive about the service with positive comments being made about the driver (22%) and the frequency of the service (14%).

Table 4-3 Service rating reason by target audience¹⁹

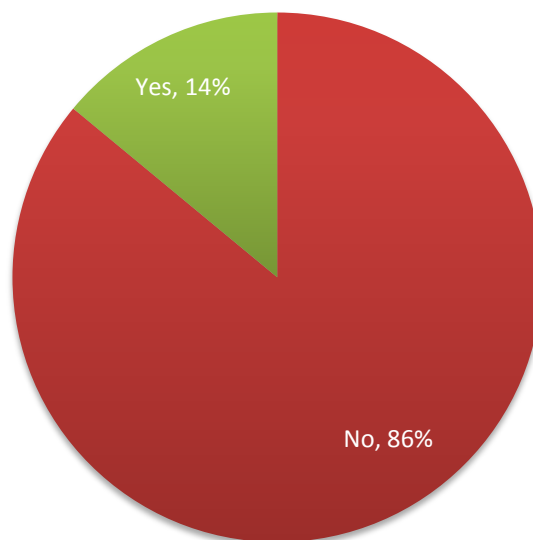
	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
No problems/excellent	31	36	30	38
Positive comment about bus driver on time/punctual	12	21	20	22
Negative comment about bus driver ATTITUDE	11	11	9	9
Ok/generally goo	9	11	10	6
Lateness/not to timetable/delays	13	4	7	5
Infrequent/too long to wait between buses	15	1	7	3
Frequency is good	3	6	5	14
Buses are well presented	4	4	8	8
Expensive	7	5	5	3
Cheap fares	6	6	1	6
Good timetables/number of stops	4	4	3	5
Easy to use	2	3	7	2
Negative comment about bus driver DRIVING	3	1	5	3

¹⁹ What makes you say that? Students n=102, caregivers n=99, retail workers/shoppers n=116, older people n=65.

Overall, 86% of lapsed users had not changed their perception of the bus service since they had last used the service. However, it is interesting to note that those who last used the bus service *more than a year ago* are significantly more likely to state that they have had a change in perceptions (26% have changed their perceptions) while those who have used the service *within the last year* are less likely to (8% have changed their perceptions).

When looked at by the different target audiences students have had the greatest change in perceptions (19% have changed their perceptions since last using the bus service) while caregivers have had the least change in perceptions (only 10%); 16% of retail workers/shoppers and 12% of older people have changed their perceptions since last using the bus service.

Figure 4-6 Changes in perception²⁰



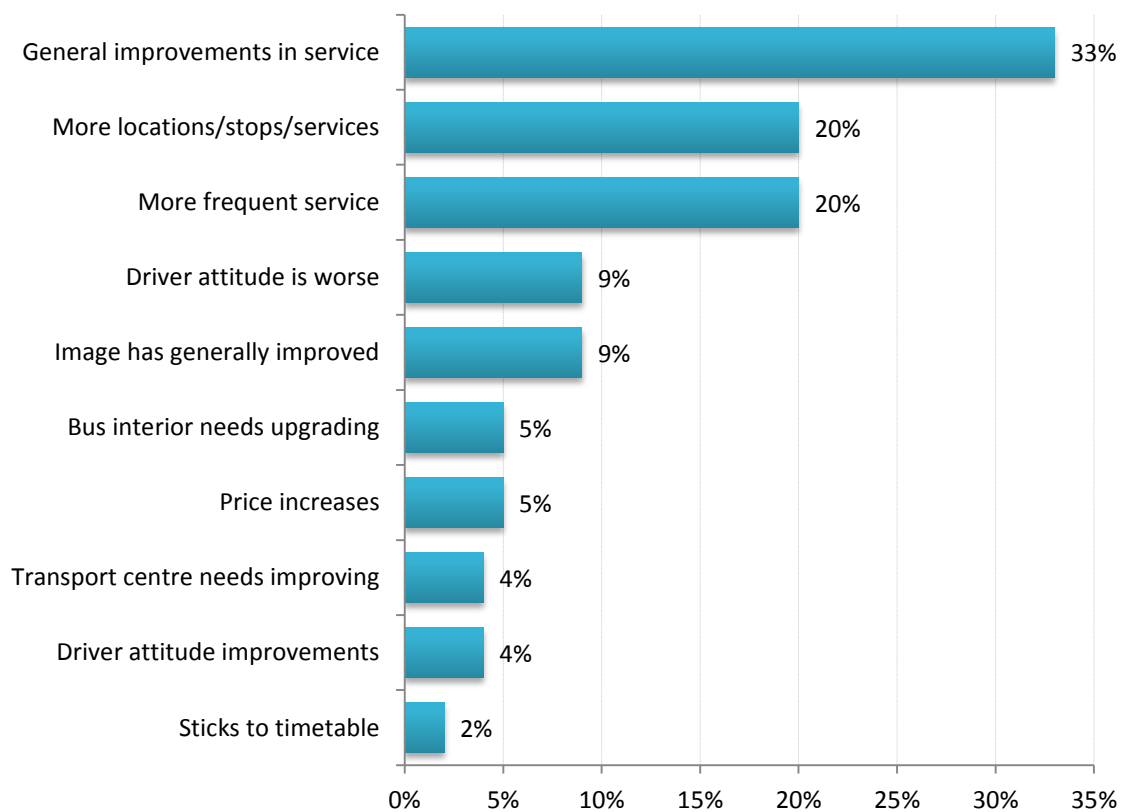
²⁰ Has your perception changed since you last used the bus? All lapsed users n=382, students n=102, caregivers n=99, retail workers/shoppers n=116, older people n=65.

Generally lapsed users' perceptions of the bus service appear to be more positive with 33% stating that the service is generally improved, 20% stating that there are more locations/stops or services, 20% stating there are improvements in the service frequency and 9% saying the bus image is general better.

Negative changes in perceptions appear to be less with only 9% stating the driver attitude is worse, and 5% each stating the bus interior requires upgrading and/or the price has increased.

All other mentions in changes register 4% or less. This sample size is too small to analyse by the different target audiences.

Figure 4-7 How perceptions have changed²¹

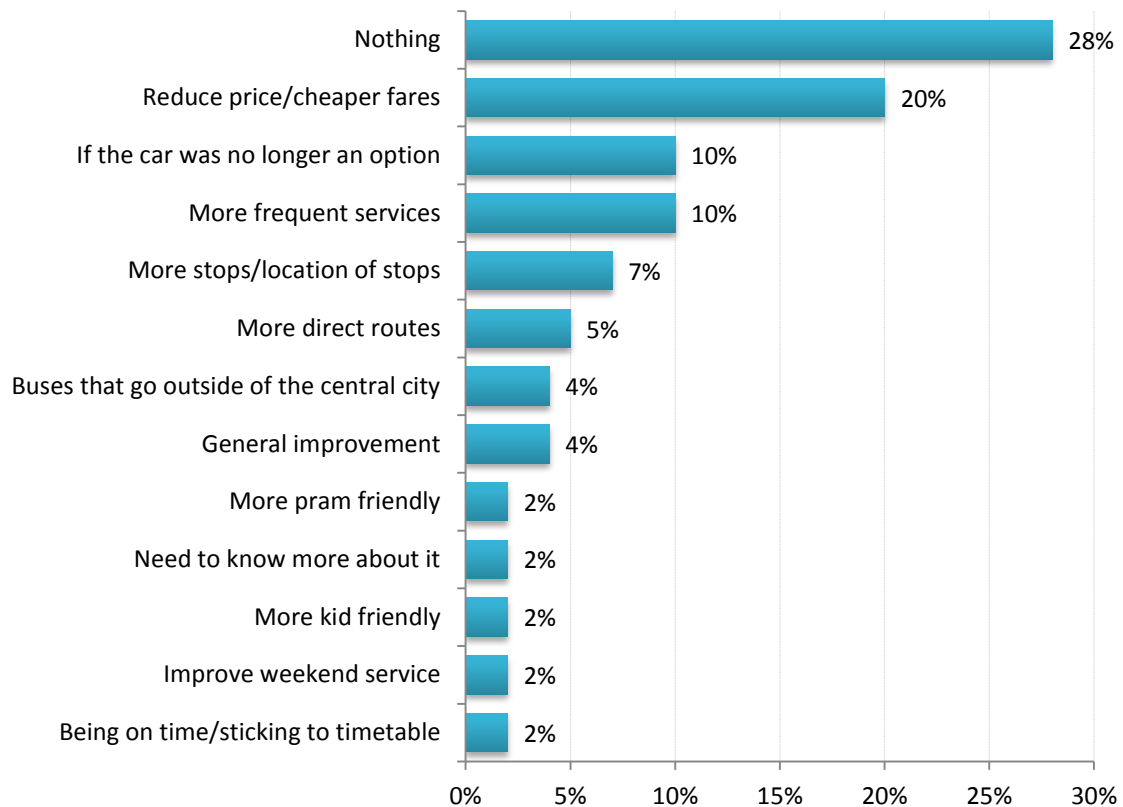


²¹ How so? All lapsed users who have changed their perception of the bus since they last used the service n=55.

When asked what will motivate increased bus usage 28% of lapsed users state that nothing would motivate them to use the bus service more often and 10% state they will use it if their car is no longer an option.

Twenty per cent state that a cheaper service would assist in patronage while 10% mention a more frequent service. Seven per cent suggest increasing the number of stops and 5% indicate that more direct routes will help.

Figure 4-8 Motivation to increase usage²²



²² What is the one thing that would motivate you to use the bus more? All lapsed users n=382.

Students appear to be price driven and suggest that a drop in fares (31%) along with more frequent services (17%) will increase their usage.

Caregivers suggest that sticking to the timetable (5%), having a more child friendly service (7%) and making it easier to use with prams (4%) will increase their usage.

Retail workers/shoppers are more likely to say they require more information about the service (4%) while older people are more likely to suggest a general improvement to the service overall (9%).

Table 4-4 Motivation to increase usage by target audience²³

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Nothing	22	27	31	35
Reduce price/cheaper fares	31	17	16	11
More frequent services	17	7	12	2
If the car was no longer an option	11	9	9	14
More stops/location of stops	4	5	9	11
More direct routes	7	5	5	5
General improvement	1	3	6	9
Buses that go outside of the central city	2	4	3	6
Being on time/sticking to timetable	1	5	3	0
Improve weekend service	2	3	1	3
More kid friendly	1	7	0	0
Need to know more about it	1	0	4	0
More pram friendly	0	4	0	3

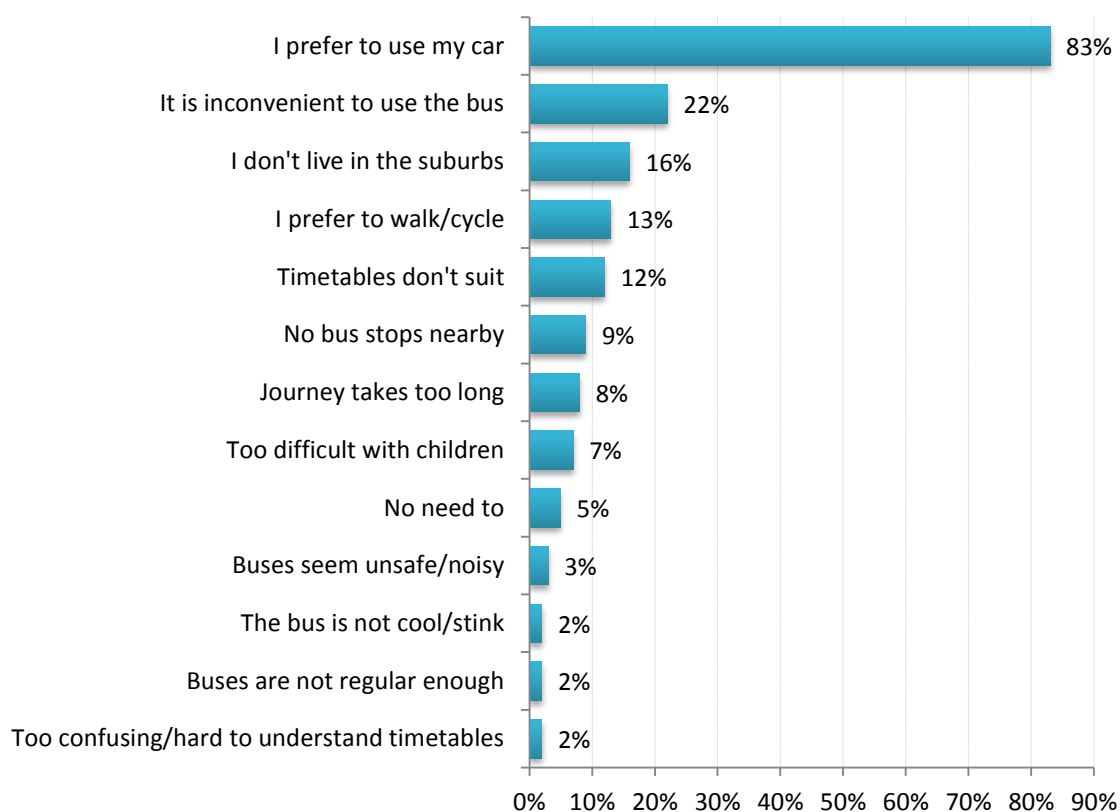
²³ What is the one thing that would motivate you to use the bus more? All lapsed users n=382.

5 FEEDBACK FROM NON USERS

The overwhelming reason for not using the bus amongst non users is that they prefer to use their car. This was followed by the fact that it is inconvenient to use the bus (22%) and that they do not live in the suburbs where the buses are easily accessible (predominant mentions are Horsham Downs or rural areas, e.g., Tamahere).

This was followed by a series of smaller reasons ranging from a preference for cycling/walking (13%) to perceptions of confusing timetable information (2%).

Figure 5-1 Reason for not using the bus²⁴



²⁴ Why do you not use the bus? All non users n=212.

Students are more likely to state they prefer to walk or cycle than use the bus (24%) and are also the most likely group to take issue with the image associated with using the bus (7%).

Caregivers are more likely to state that there are no bus stops nearby (16%) or they find using the bus too difficult with children (22%). Retail workers are the least likely group to state they prefer to use their car (74%) while older people are more likely to say that the buses are not regular enough (7%).

Table 5-1 Reason for not using the bus by target audience²⁵

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
I prefer to use my car	88	85	74	84
It is inconvenient to use the bus	29	13	22	27
I don't live in the suburbs	14	18	17	13
I prefer to walk/cycle	24	11	16	5
timetables don't suit	10	7	14	16
No bus stops nearby	7	16	3	9
Journey takes too long	10	7	7	11
Too difficult with children	0	22	3	0
No need to	7	7	5	2
Buses seem unsafe/noisy	5	7	2	0
Too confusing/hard to understand timetables	0	4	0	5
Buses are not regular enough	0	0	0	7
The bus is not cool/stink	7	0	0	2

²⁵ Why do you not use the bus? Students n=43, caregivers n=55, Retail workers/shoppers n=58, Older people n=56.

The majority of non users use a private car instead of taking the bus (93%) and just over one third will walk instead of using the bus. There are limited differences in the use of alternative modes of transport across the different target audiences.

Figure 5-2 Other modes of transport used²⁶

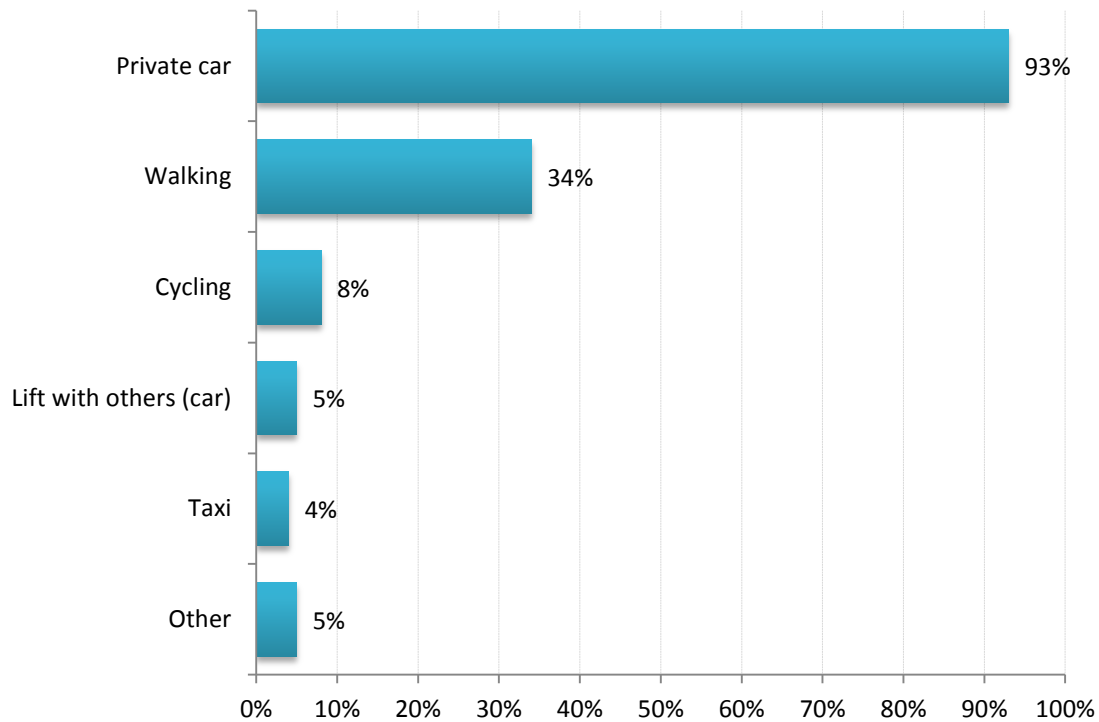


Table 5-2 Other modes of transport used²⁷

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Private car	88	96	93	95
Walking	24	35	33	43
Cycling	12	7	5	7
Lift with others (car)	5	2	9	5
Taxi	0	4	9	2
Other	2	5	5	5

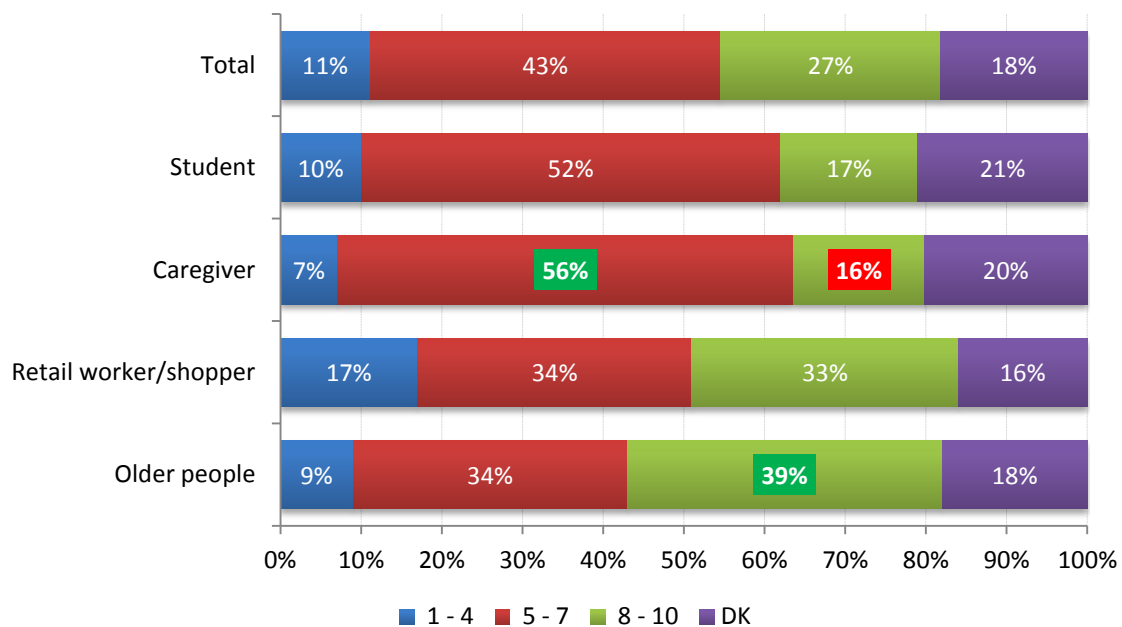
²⁶ What transport do you use instead of the bus? All non-users n=212.

²⁷ What transport do you use instead of the bus? Students n=43, caregivers n=55, Retail workers/shoppers n=58, Older people n=56.

Overall, 27% of non users rate the bus service between 8 and 10 out of 10, 43% rate it between 5 and 7 out of ten while 11% rate the service 4 or less. Nearly one fifth of non users state that they 'don't know' how to rate the bus service.

Across the different target audiences, caregivers provide the most neutral rating with over half rating the service between 5 and 7 out of 10. Retail workers/shoppers rate the service lowest with 17% providing a rating of 4 or less. Older people rate the service highly, with 39% providing a rating between 8 and 10 out of 10.

Figure 5-3 Rating of service²⁸



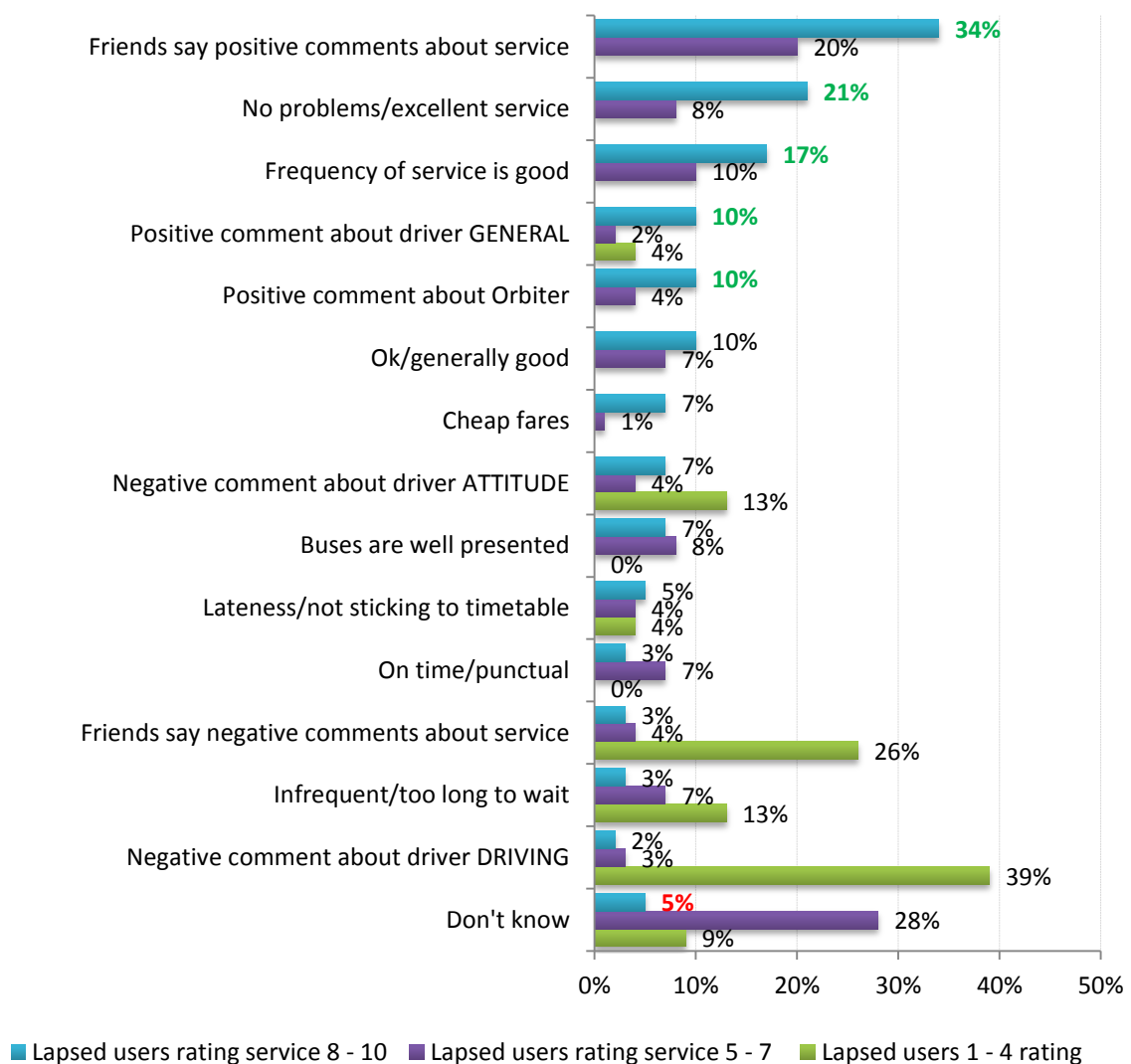
²⁸ Based on your experience, on a scale of 1 to 10, where 1 is very poor service and 10 is excellent service, how would you rate the Hamilton bus service? All non-users n=212, students n=43, caregivers n=55, Retail workers/shoppers n=58, Older people n=56.

Non users who rate the service highly (between 8 and 10 out of 10) hear positive comments about the service (34%); they feel that the service is excellent (21%) with a good frequency (17%). Positive comments also come through generally (10%) and specifically about the Orbiter service (10%) for this group

Those providing ratings between 5 and 7 also hear positive comments about the service (20%) but appear unable to provide a specific reason for their impressions (28% state don't know).

Non users who provide lower ratings (4 or less) are more likely to have negative comments about the drivers' attitudes (13%), to hear negative comments from friends (26%) or to have a poor impression of the drivers' driving (39%).

Figure 5-4 Service rating reason²⁹



²⁹ What makes you say that? Non-users 1 – 4 n=23, non-users 5 – 7 n=92, non-users 8 – 10 n=58.

Students are more likely to say that friends have positive comments about the service (40%) and are more likely to perceive the buses to be on time/punctual (10%).

Caregivers are more likely to hold negative perceptions about the driver attitude (13%) while retail workers/shoppers are more likely to perceive the service to be late (9%) or that the wait between buses is too long (12%).

Older people are more likely to hold positive impressions of the Orbiter service (14%).

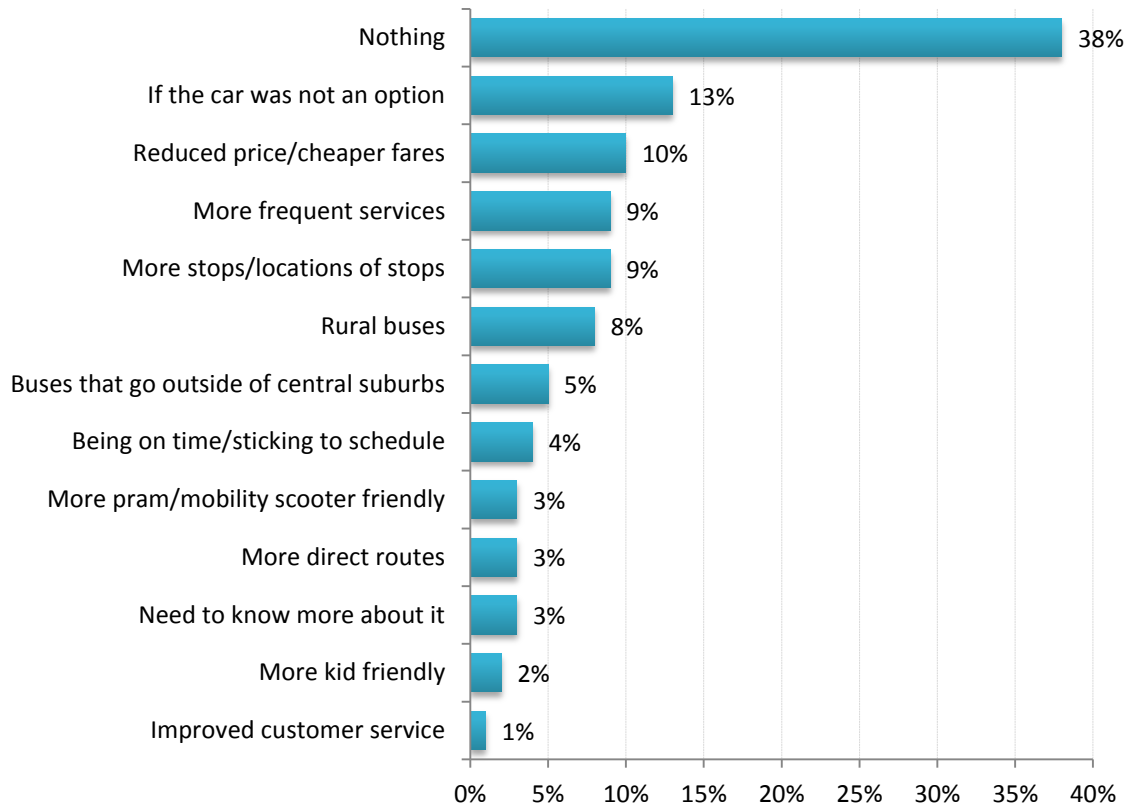
Table 5-3 Service rating reason by target audience³⁰

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Friends say positive comments about service	40	18	14	13
No problems/excellent service	10	13	5	11
Frequency of service is good	5	9	14	7
Ok/generally good	2	4	9	7
Positive comment about Orbiter	0	4	2	14
Positive comment about driver	2	4	7	4
GENERAL				
Buses are well presented	5	9	0	7
Lateness/not sticking to timetable	2	4	9	0
Negative comment about driver	2	13	2	4
ATTITUDE				
Cheap fares	2	4	2	2
Infrequent/too long to wait	2	2	12	5
Friends say negative comments about service	7	4	7	5
On time/punctual	10	4	2	2
Negative comment about driver	2	9	7	5
DRIVING				
Don't know	26	31	31	29

³⁰ What makes you say that? Students n=43, caregivers n=55, Retail workers/shoppers n=58, Older people n=56.

Thirty-eight per cent of non users state there is nothing that would increase their motivation to use the bus service and a further 13% indicate they would only use the bus if the car was no longer an option. Cheaper fares (10%), more frequent services (9%), more stops (9%) and rural buses (8%) are mentioned as the primary motivators for bus usage.

Figure 5-5 Motivation to increase usage³¹



³¹ What is the one thing that would motivate you to use the bus more? All non-users n=212.

There are limited differences across the target audiences with the highest proportion in each group stating there is nothing that will motivate them to use the bus.

As with lapsed and current users, students appear more price sensitive with 24% stating cheaper fares will motivate them to use the bus service. Caregivers are more likely to request more pram friendly services (9%) and a general improvement in how the services accommodate children (7%).

Older people are more likely to state that they will use a service that travels outside of the central suburbs (11%).

Table 5-4 Motivation to increase usage by target audience³²

	Students %	Caregivers %	Retail workers/ shoppers %	Older people %
Nothing	31	38	45	36
If the car was not an option	17	5	12	18
Reduced price/cheaper fares	24	9	5	5
More stops/locations of stops	10	9	5	14
More frequent services	0	13	12	9
Rural buses	7	7	10	4
Buses that go outside of central suburbs	2	4	2	11
Being on time/sticking to schedule	5	7	0	5
Need to know more about it	7	4	2	2
More direct routes	2	4	5	2
More pram/mobility scooter friendly	0	9	0	2
More kid friendly	0	7	0	0
Improved customer service	0	4	0	0

³² What is the one thing that would motivate you to use the bus more? Students n=43, caregivers n=55, Retail workers/shoppers n=58, Older people n=56.

6 DISCUSSION OF FINDINGS

Overall the bus service in Hamilton appears to be well received with both users and non users holding reasonably positive impressions of the service. For current and lapsed users the impression of the service appears to be driven by positive driver interaction and a generally good service experiences for non users these impressions are reinforced by word of mouth. Indeed service ratings improve considerably amongst current users suggesting limited issues with the service generally.

Any negative perceptions associated with the bus service relate mostly to a lack of frequency and poor impressions of drivers' attitudes. For non users, on road interactions with buses reinforce negative impressions of drivers with comments relating to poor driving evident.

However, the greatest barrier to increasing usage is the convenience of a privately owned car. Indeed one of the primary motivators for using the service is lack of access to a car while the reason for ceasing use is improved access to a car. The flexibility and perceived cost savings (relative to bus fares) that a car provides entrenches this position. As such when looking at conversion from car to trialing the bus or to increasing usage amongst current users some common themes emerge:

- **Frequency:** the perceived lack of frequency with off peak services appears to drive an impression of inconvenience. This aspect relates to how often a bus is available and although there is a perception of improved frequency amongst some lapsed users, this issue remains common across both users and non user groups.
- **Cost:** perceptions of a lack of cost effectiveness is driven primarily by via two avenues (1) the limit of single hour travelling for a ticket (2) the cost of a casual fare, particularly for those with multiple people in a group, e.g., family shopping. Combined these aspects appear to make the bus a more expensive option particularly for short distances where the 'cost' of running a vehicle is perceived as minimal relative to paying for a bus fare.

In addition to the above general points, specific barriers also appear across the different user groups:

- **Students:** for students, cost appears to be a significant barrier to greater usage. For many, there is the expectation that a student fare/discount should apply. This group also took particular issue with the single hour limit, predominantly for those attending a one off lecture or event which will extend to a two hour duration resulting in payment of a double fare.
- **Caregivers:** caregivers appear to have multiple barriers for greater usage, all of which are tied up with concern of transporting children. Anecdotally, issues with safety at stops and on board buses for younger children are of concern to this group. Caregiver also consistently spoke of having a service which was simple to use with prams and which was generally more welcoming to those with children.

While frequency is not as critical for this group timeliness is, as the ability to 'leave when needed' is considered important. Services that incur delays to travelling will present a significant barrier to caregivers.

Potentially, this group seemed the least informed about the bus system with the assumption that the service will be 'difficult to use' common amongst lapsed and non users. Interestingly, this group also suggested that greater advertising of services may help improve patronage.

- **Retail workers/shoppers:** for this group it is a combination of aspects relating to access that suppresses patronage, e.g., frequency, ability to access the bus from rural areas/suburban areas, and trip duration, rather than a poor experience or impression of the bus generally with fewer mentions of lateness, costs, or easier usage. For this group it seems that it is the location that they access the bus from which hinders their usage; which in turn affects the perceived flexibility and convenience of the service provided.
- **Older people:** this group holds the most positive impressions of the service with high service ratings held amongst users and non users alike. The fact that the service is free with a gold card instantly overcomes a significant barrier to usage and given the time rich nature of this group, the frequency of the service is not as critical either. Similar to retail workers/shoppers, older people appear to need support in accessing the bus with mentions of more stops a consistent issue across user groups as this assists with making travel easier for older people, i.e., less walking/travelling to get to and from the bus stop.

In conclusion, it appears that issues relating to frequency and cost cannot be solved with the current peak service model which relies on high patronage to be efficient and effective. Off peak usage is about frequent, friendly and affordable options that address the perceived inconvenience of the current service model. Consideration should be given to communicating the strengths of the current offer (every half an hour, friendly service) but addressing ways in which services can be tailored to the specific needs of the target audiences.

7 APPENDICES

7.1 Appendix 1: Questionnaire

Hi there, I'm [NAME] from Versus Research; I'm doing a survey about bus usage. Can I ask you a few quick questions please?

INFORMATION TO PROVIDE IF NEEDED:

HOW LONG WILL IT TAKE: the whole survey will take about 5 minutes

WHO FOR: We are completing this survey on behalf of the Waikato Regional Council

WHERE ARE YOU FROM: I am from Versus Research, a research company commissioned to complete this research. All your answers are anonymous and are completely confidential.

WHAT WILL YOU DO WITH THE INFORMATION: the information is used to help Waikato Regional Council address ways in which to increase bus usage.

Can I please confirm that you don't work for the Council, nor work for the Bus Service?

Count:			
Agree	Refuse	DNQ	
DETAILS			
Date		Time Started	

S1. Have you ever used the bus in Hamilton?	
Yes- Go to Q.2	1
No- Go to Section C: Non users	2

S2. Do you currently use the bus?	
Yes- Go to Section A: Current users	1
No- Go to Section B: Lapsed users	2

SECTION A: Current Users

A1. How often do you use the bus service?

Do not read out, code closest, Single answer only

Daily (Monday to Friday)	1
Daily (Monday to Sunday)	2
Three/Four times per week	3
Once/Twice per week	4
Monthly	5
Rarely	6

A2. Why do you choose to use the bus?

Do not read out, code closest, Multiple answers allowed

Ease of use	1
Currently have no car/ other method of transport	2
Saves hassle/ money on parking	3
Environmental reasons	4
Cheaper/ saves on gas	5
Enjoy catching the bus	6
Other, please specify:	7

A3. Aside from the bus, what other modes of transport, if any, do you use?

Do not read out, code closest, Multiple answers allowed

Car - Private	1
Walking	2
Cycling	3
Taxi	4
Nothing	5
Other, please specify:	6
Car (get a lift with someone)	7

A4. Based on your experience, on a scale of 1 to 10, where 1 is a very poor service and 10 is an excellent service, how would you rate the Hamilton bus service?

1 Very poor service	2	3	4	5	6	7	8	9	10 Excellent service
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A5. Why do you say that?

Record verbatim

A6. What is the one thing you would suggest to improve the bus service in Hamilton?

Record verbatim

Current Users: Go to Section D: Demographics

SECTION B: Lapsed Users

B1. When did you last use the bus in Hamilton?

This week	1
Last month	2
In the last 6 months	3
In the last year	4
Two years ago	5
More than three years ago	6
Can't remember	7

B2. What bus routes did you use previously?

Record verbatim

--

B3. Why do you no longer use the bus?

Do not read out, code closest, Multiple answers allowed

I now have access to a car	1
I prefer to walk/cycle	2
It was inconvenient to use the bus	3
Timetables didn't suit	4
Buses were not regular enough	5
Buses were not reliable enough	6
Felt unsafe	7
It was too difficult for me to use as an older person	8
It was too difficult for me to use as I have a disability	9
Did not enjoy the bus experience	10
It was too difficult to use with children	11
Too expensive	12
Journey took too long	13
There are no bus stops nearby	14
Other, please specify:	15

B4. What transport do you use instead of the bus?*Read out, code closest, Multiple answers allowed*

Car (own)	1
Car (get a lift with someone)	2
Walking	3
Cycling	4
Taxi	5
Other, please specify:	6

B5. Based on your experience, on a scale of 1 to 10, where 1 is a very poor service and 10 is an excellent service, how would you rate the Hamilton bus service?

1 Very poor service	2	3	4	5	6	7	8	9	10 Excellent service
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B6. Why do you say that?*Record verbatim*

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B7. Has your perception changed since you last used a bus?

Yes	1
No	2

B8. If YES: how so?*Record verbatim*

--

B9. What is the one thing that would need to change to motivate you to use the bus more often?

Record verbatim

--

Lapsed Users: Go to Section D: Demographics

SECTION C: Non Users

C1. Why do you not use the bus?

Do not read out, code closest, Multiple answers allowed

I prefer to use my car	1
I prefer to walk/cycle	2
It is inconvenient to use the bus	3
Timetables don't suit	4
Buses are not regular enough	5
Buses are not reliable enough	6
Buses seem unsafe/ noisy/ uncomfortable	7
Too confusing/ hard to understand bus routes etc.	8
I'm too scared/not confident enough/nervous	9
Not suitable/ too difficult to use with children	10
Not suitable for older people	11
Not suitable for people with disabilities	12
I can't take my bike on the bus	13
Too expensive	14
Journey takes too long	15
No bus stops nearby	16
Not enough amenities at the bus stop, e.g., no bus shelter	17
The bus is not cool/stink (respondent doesn't like the 'image' of using a bus)	18
Other, please specify:	19

C2. What transport do you use instead of the bus?

Read out, code closest, Multiple answers allowed

Car (own)	1
Car (get a lift with someone)	2
Walking	3
Cycling	4
Taxi	5
Other, please specify:	6

C3. Based on what you have seen or heard, on a scale of 1 to 10, where 1 is a very poor service and 10 is an excellent service, how would you rate the Hamilton bus service?

1 Very poor service	2	3	4	5	6	7	8	9	10 Excellent service
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C4. Why do you say that?

Record verbatim

--

C5. What is the one thing that would need to change to motivate you to use the bus?

Record verbatim

--

SECTION D: Demographics

D1. Just a couple of questions about yourself? Which age group do you fall into...

15-17	18-24	25-34	35-44	45-59	60-64	65+	Refused
-------	-------	-------	-------	-------	-------	-----	---------

D2. What is your current occupation?

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D3. Which of the following best describes your household...

Group flatting together	Family with mainly pre-school children living at home	Family with mainly school-aged children living at home	Family with mainly adult children living at home (including university students)	Single/ couple no children	Refused
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D4. Which bracket does your household income fall into ...

Less than \$30,000	\$30,000 - \$59,999	\$60,000 - \$79,999	\$80,000 - \$99,999	\$100,000 - \$119,999	\$120,000+	Refuse
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D5. Are you interested in participating in further research around bus usage in Hamilton?

Yes - interested	No – not interested
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Please enter name and best contact number below

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Thank-you for your time today!

INTERVIEWER TO RECORD

MALE	FEMALE
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END TIME:	INTERVIEWER INITIALS:
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7.2 Appendix 2: Sample profile

Table 7-1 Age³³

	Total %	Students %	Caregivers %	Retail workers/shoppers %	Older people %
15 - 17	3	3	1	7	0
18 - 24	26	69	11	22	0
25 - 34	18	20	37	16	0
35 - 44	15	4	41	16	1
45 - 59	15	4	8	29	17
60 - 64	6	0	1	4	19
65+	16	0	2	6	62
Refused	0	0	1	0	0

Table 7-2 Household situation³⁴

	Total %	Students %	Caregivers %	Retail workers/shoppers %	Older people %
Group flatting together	15	44	1	14	0
Family with mainly pre-school children living at home	18	6	62	7	1
Family with mainly school-aged children living at home	16	11	27	22	2
Family with mainly adult children living at home (including university students)	12	16	3	16	12
Single / couple no children	38	21	8	39	85
Refused	1	1	1	1	0

³³ Which age group do you fall into...? Total n=871, students n=215, caregivers n=200, retail workers/shoppers n=255, older people n=201.

³⁴ Which of the following best describes your household? Total n=871, students n=215, caregivers n=200, retail workers/shoppers n=255, older people n=201.

Table 7-3 Household income³⁵

	Total %	Students %	Caregivers %	Retail workers/shoppers %	Older people %
Less than \$30,000	31	65	10	25	26
\$30,001 - \$59,999	18	9	27	22	15
\$60,000 - \$79,999	10	4	14	14	8
\$80,000 - \$99,999	10	4	16	11	7
\$100,000 - \$119,999	4	1	6	5	3
\$120,000+	7	2	14	7	6
Refused	20	15	16	16	34

Table 7-4 Gender³⁶

	Total %	Students %	Caregivers %	Retail workers/shoppers %	Older people %
Male	36	46	21	35	41
Female	64	54	80	65	59

³⁵ Which bracket does your household income fall into? Total n=871, students n=215, caregivers n=200, retail workers/shoppers n=255, older people n=201.

³⁶ Gender recorded. Total n=871, students n=215, caregivers n=200, retail workers/shoppers n=255, older people n=201.