Environment Canterbury

CHRISTCHURCH METRO USER SURVEY 2021

November | 2021

Contents

Section 1

Background

Context and objectives

Environment Canterbury (ECan) contracts bus and ferry companies to provide public passenger transport services in Greater Christchurch and Timaru. The council prides itself on the quality of service it delivers and wants to ensure high performance standards are maintained.

This annual Metro User survey is carried out to obtain feedback relating to the performance of the Council and its contractors.

This report provides

- a rating of the bus service provided by the Council and contracted bus companies;
- comparable information with historical data across different modes of transport, providers, and regions; and
- trends and identifies opportunities for improvement.

To meet internal and external reporting requirements, the key research objectives are to

- understand who is using the bus service and if the demographic profile is changing;
- investigate customer satisfaction with the network service, specifically frequency, reliability, value for money, accessibility, comfort, driver attitude, and ease of use;
- understand how users view the provision of infrastructure and information provided as part of the service; and
- investigate how users view the different operators and the overall system.

Impact of COVID-19

Typically, the Metro User survey is conducted for six weeks in April and May of each year. Due to COVID-19 restrictions, this was not possible in 2021.Data collection began at the start of August 2021. A further change to New Zealand COVID-19 levels meant that data collection had to stop and restart during 2021. Dates of data collection are

- Started: 16th August – 17th August 2021
- Restarted: 19th October – 26th November 2021

Similar to the 2020 survey, we expect that the changes to survey patterns and patronage outlined above may have had some influence on satisfaction levels.

Method

Passengers were interviewed whilst travelling on the buses, with 2,060 interviews being completed in Christchurch and 136 in Timaru. Quotas were set up to match passenger numbers, routes, and times of day based on adult patronage figures as interviewing was conducted with those aged 16 years and over.

In view of the ongoing impact of the COVID-19 pandemic on bus use, the survey used 2020 patronage statistics to determine the sample profile for routes and times.

Table 1.1 2021 Christchurch sample summary

N = 2060	Number of interviews	% of total sample
Single digit	900	44%
Double digits	544	26%
Triple digits	295	14%
Ferry	21	1%
Orbiter	300	15%

Section 2

Executive summary

The Christchurch bus user profile remains largely consistent

1	The demographic profile of bus users in Christchurch continues to be skewed in favour of women, with a spread of ages. This profile remains consistent with 2020.
2	Metrocard use is increasing over time, cannibalising cash usage. Fewer than one in ten used cash for their trip in 2021.
3	Daily users of the service are decreasing over time, indicative of the current COVID-19 environment where fewer people are travelling, preferring to work or learn from home and shop online.
4	Over half of the patrons in 2021 were employed, with work being the most frequent reason for using the bus service.

Bus service satisfaction remains high

1	Trip satisfaction met the Long Term Plan 2018-2028 target, reaching 96 percent with 50 percent of users rating the trip satisfaction as a 9 or 10 (the highest level of satisfaction).
2	Broader service areas are also rated highly among existing users, with almost all service areas increasing the proportion of highly satisfied users.
	• Ease of getting on or off the bus and feelings of personal security have the highest satisfaction scores of 93 percent, respectively.
	• Frequency of service (85 percent) and value for money (81 percent) continue to receive the lowest satisfaction scores.

Satisfaction with the overall bus system is positive

1	Satisfaction with public transport continues to remain high, consistent with previous iterations of the survey, particularly among patrons aged 65+ who are also SuperGold card users.
	• Convenience of payment (93 percent) and the ease of getting information (89 percent) continue to receive the highest levels of satisfaction.
	• Quality (79 percent) and availability (80 percent) of bus shelters continue to receive the lowest satisfaction ratings, along with information about service delays or disruptions (78 percent).

Digital behaviour is more prevalent in Christchurch than in Timaru

1	In 2021, as in previous years when sourcing timetable information, the Metroinfo website is most commonly used.
2	MetroCard remains the most dominant form of payment as consumer preferences, in general, shift towards electronic and contactless forms of payment.

Section 3

Christchurch user profile

User profile summary

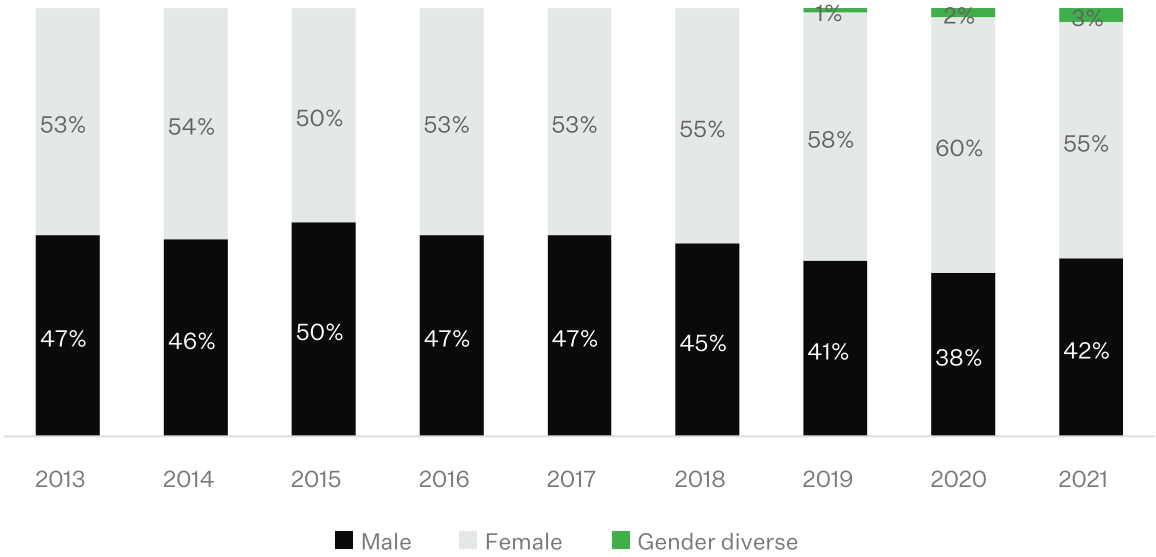
The passenger profile is generally consistent with previous years:

1	Slightly more females than males continue to use the bus service.
2	Over half are employed full or part time, meaning work is the most common trip purpose.
3	The majority earn under $40,000, with only a minority (7 percent) earning over $80,000, similar to the year 2020 patterns.
4	The proportion of 18-24-year-old users remains stable at 25 percent. As noted in the 2020 report, since 2019, this figure is the lowest it has ever been. This shift coincides with the changes in travel behaviours triggered by COVID-19; for example, tertiary institutions have transitioned to online delivery of classes, which means that students do not have to physically be on campuses, potentially reflected in the lower patronage for students travelling for tertiary education.

Christchurch bus user profile

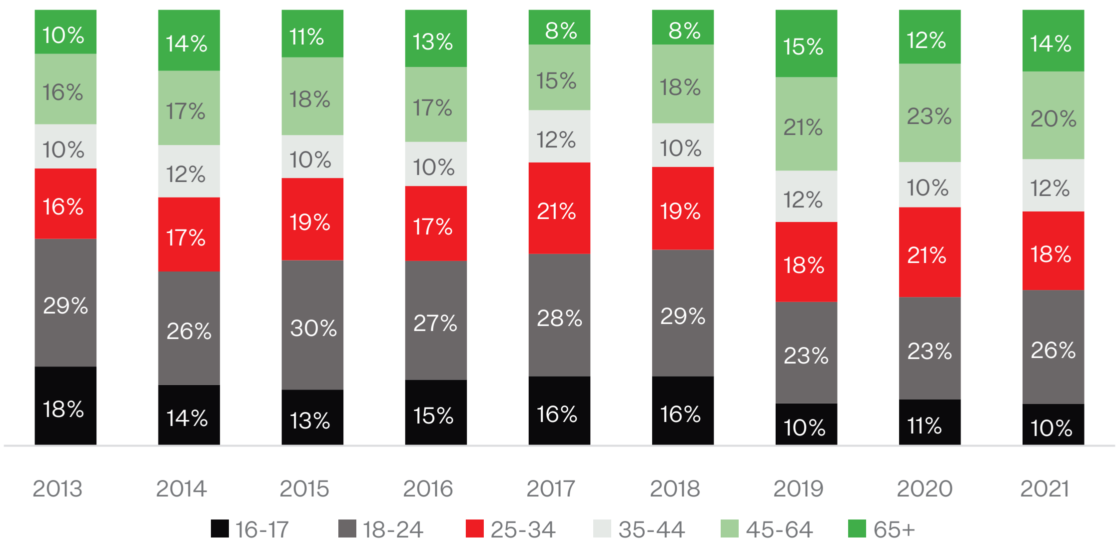
The proportion of females using buses continues to be higher than males.

Figure 3.1: Gender profile, over time



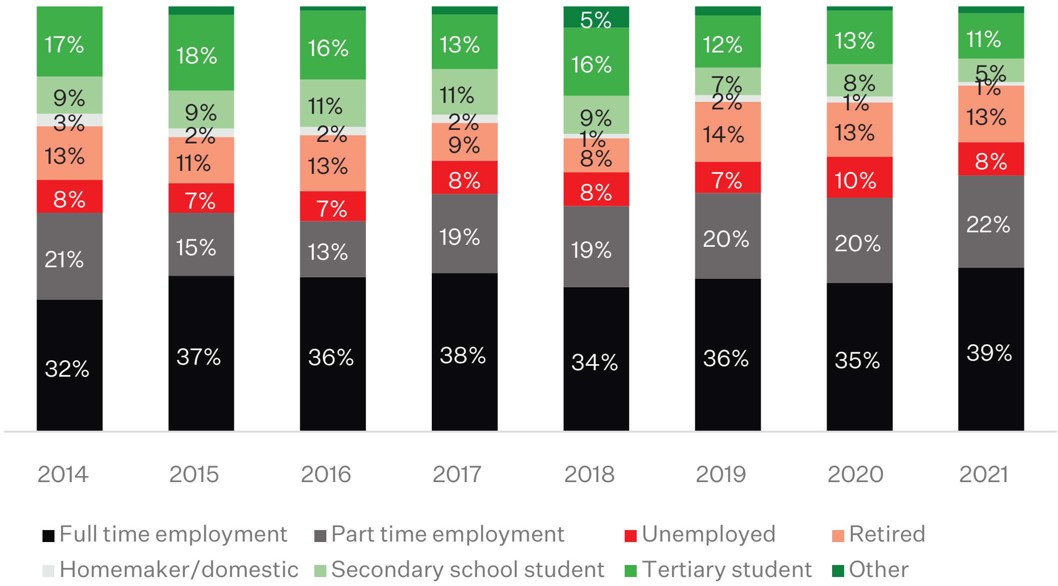
The age profile of bus users has remained relatively stable since 2019.

Figure 3.2: Age profile, over time



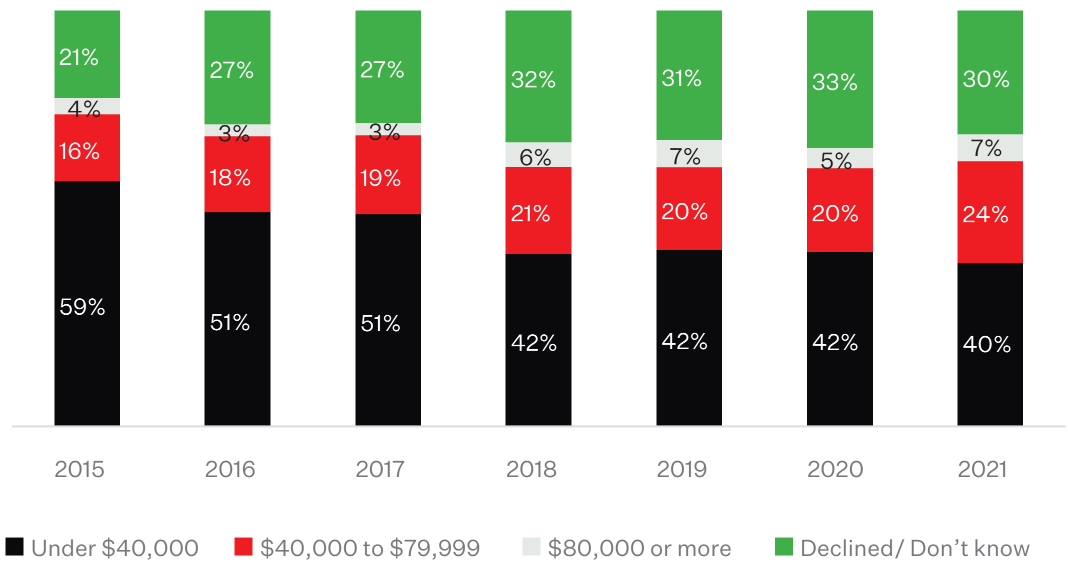
Employment remains relatively consistent.

Figure 3.3: Employment profile, over time



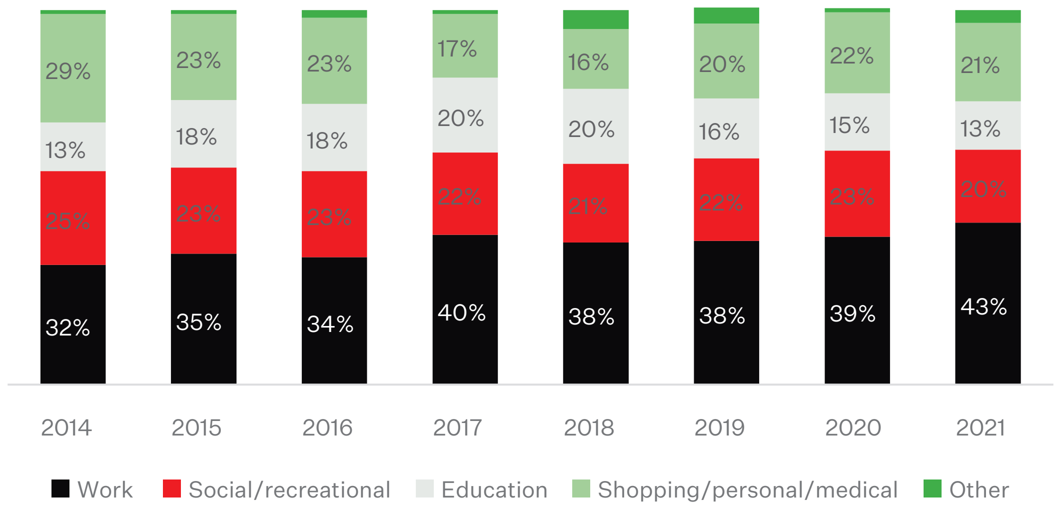
Income remains consistent with previous years. Those who use buses tend to earn less than $40,000 per year. Those who declined to answer or answered "don't know" skewed towards those who are students, unemployed, or retirees.

Figure 3.4: Income profile, over time



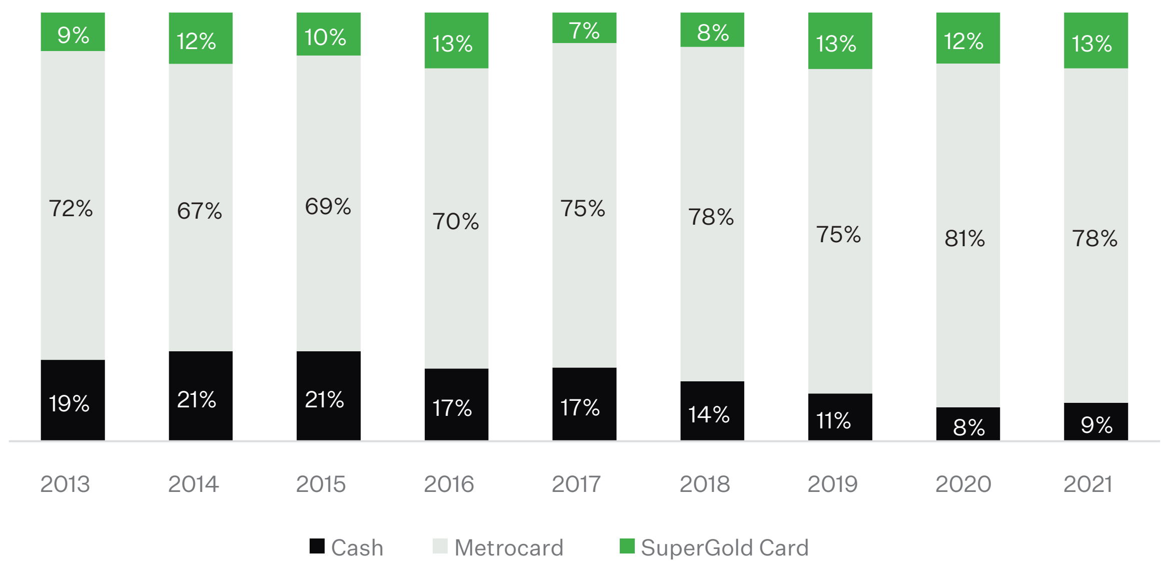
The main use of the bus service continues to be for work purposes. This has increased slightly, suggesting a slight shift in preferences for using the bus service for work travel.

Figure 3.5: Main trip purpose, over time



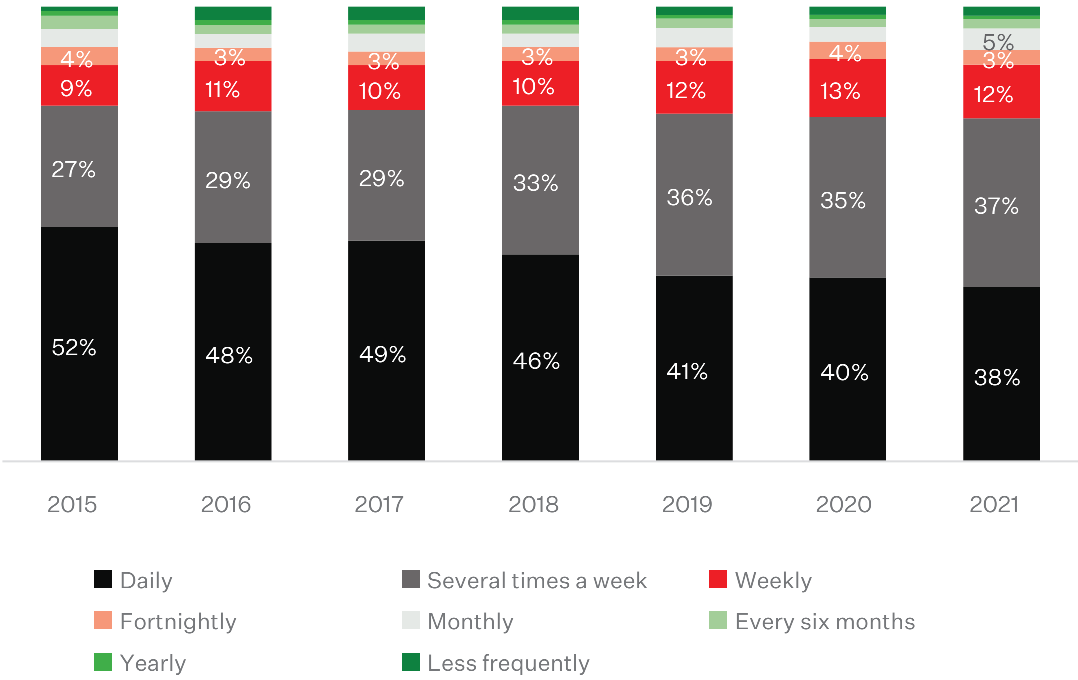
MetroCard remains the primary payment form, at around four out of five patrons. Cash and SuperGold card use has remained stable over the past three years.

Figure 3.6: Payment type, over time



The daily frequency of use shows a sustained downward trend, which is unsurprising within a COVID-19 environment where an increasing number of people are working from home or alternating on/offsite arrangements with their employers.

Figure 3.7: Frequency of use, over time



Section 4

Satisfaction with trip

Summary

Overall satisfaction remains high:

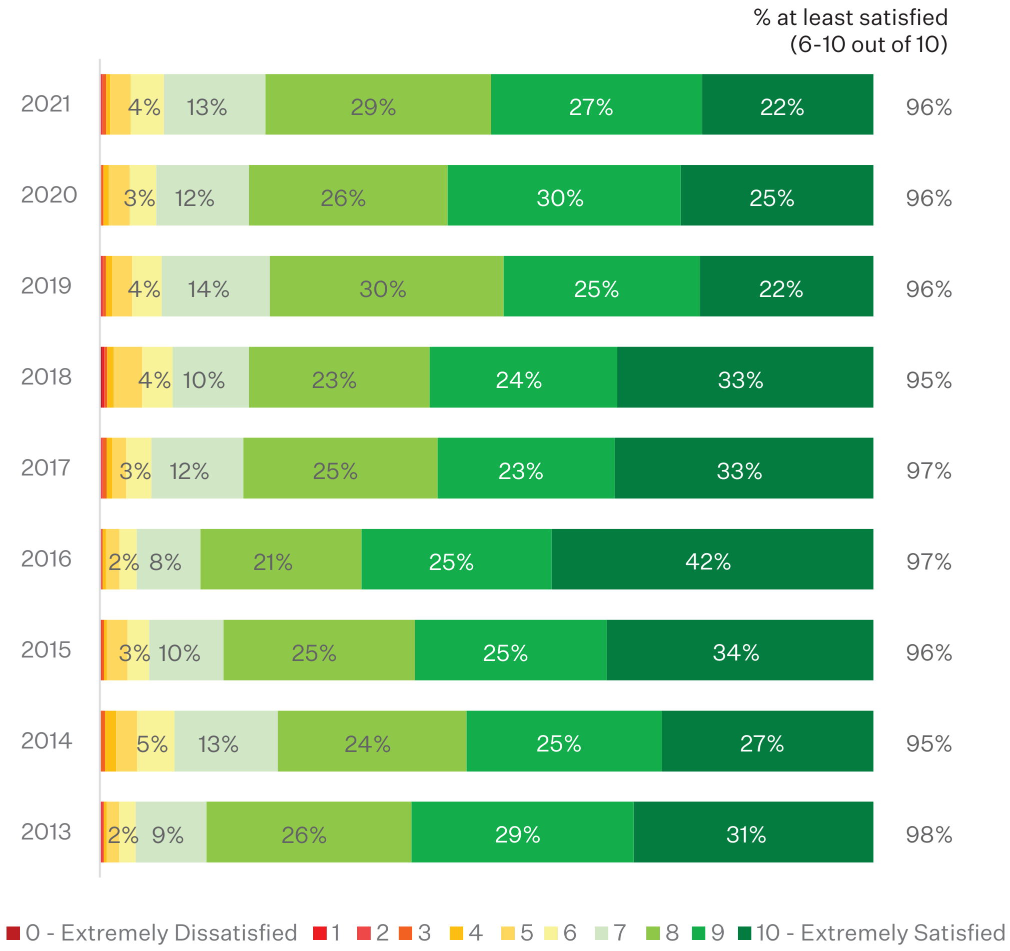
1	The Long Term Plan target continues to be met with a satisfaction level of 96 percent (target 95 percent).
2	The proportion of users giving the most positive rating (scores of 9 or 10) remains favourable at 49 percent (vs. 55 percent in 2020).
3	Younger users, frequent users, and those travelling for education or work are generally a little less satisfied.
4	Personal security and driver behaviour continue to play an important role in providing a satisfactory service for users.
5	Consistent with 2020 results, the same three priority areas were identified as improvement areas to help drive satisfaction: timeliness, value for money, and frequency of the service.
6	Most of the service areas continue to have high satisfaction ratings.

Christchurch bus user satisfaction

The 2018-28 Long Term Plan target continues to be met, with 96 percent of passengers satisfied with the overall bus service.

Satisfaction remains stable and high amongst Christchurch bus users, and the bus service continues to meet LTP targets.

Figure 4.1: Overall satisfaction, over time



Bus users are primarily satisfied because of the good service. Good driver behaviour, timeliness, convenience, and meeting the needs of users are all reasons provided for high levels of satisfaction as has been the case in previous years. In contrast, the primary reasons for lower satisfaction are related to unreliable timing or delays and dissatisfaction with some of the driver performance/behaviour.

	0-5	6-8	9-10
%	4%	47%	49%
n	81	947	1,004

Table 4.1: Reasons for overall satisfaction or dissatisfaction

Positive Comments	**%**
Excellent/good service	9%
Good driver behaviour/performance	9%
Positive (general)	6%
On time	5%
Convenience/easy	5%
Meets my needs	3%
Fast/Efficient/Reliable	2%
Cost	2%
Negative Comments	
Unreliable timing/delays	3%
Poor driver behaviour/performance	3%
Improve frequency/weekend service	2%

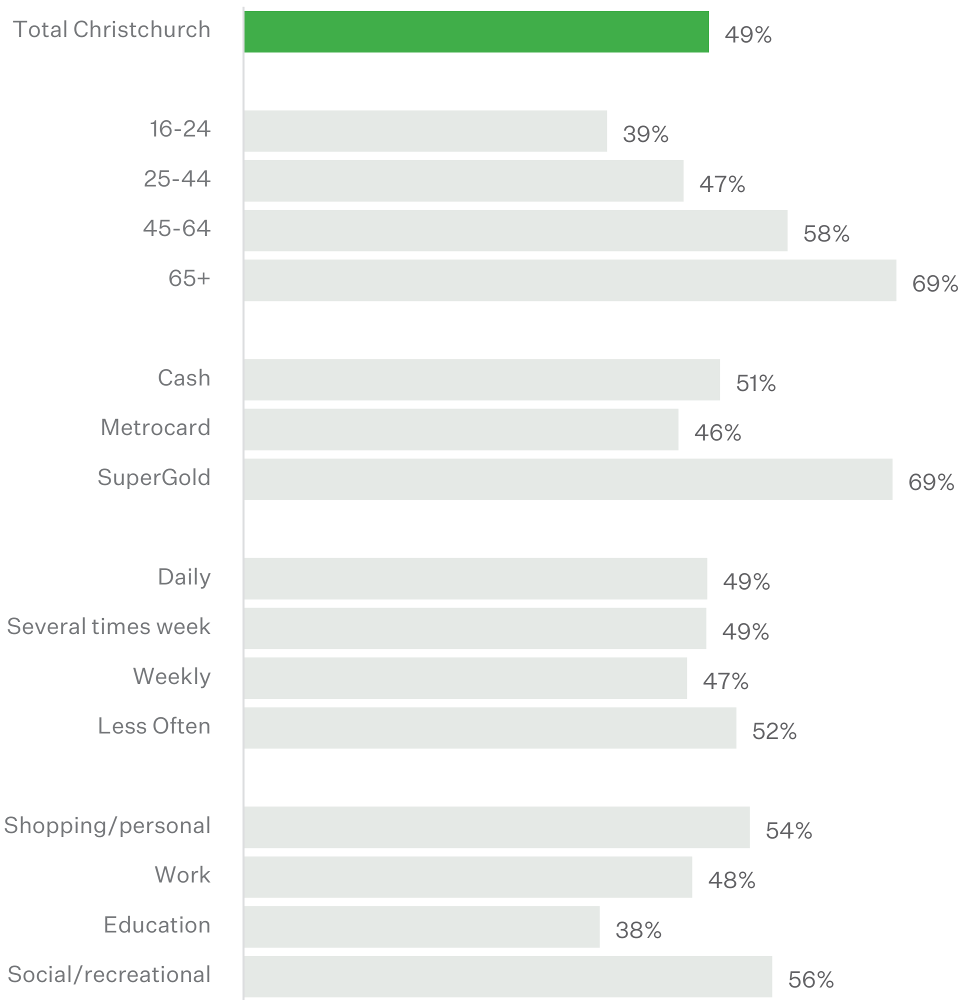
SPOTLIGHT

Which groups have the highest overall satisfaction with the bus service?

Those who provided scores of 9 or 10 represent patrons who are highly satisfied with the bus service. Similar to the 2020 patterns, the high satisfaction levels increase with age and are highest among those aged 65+.

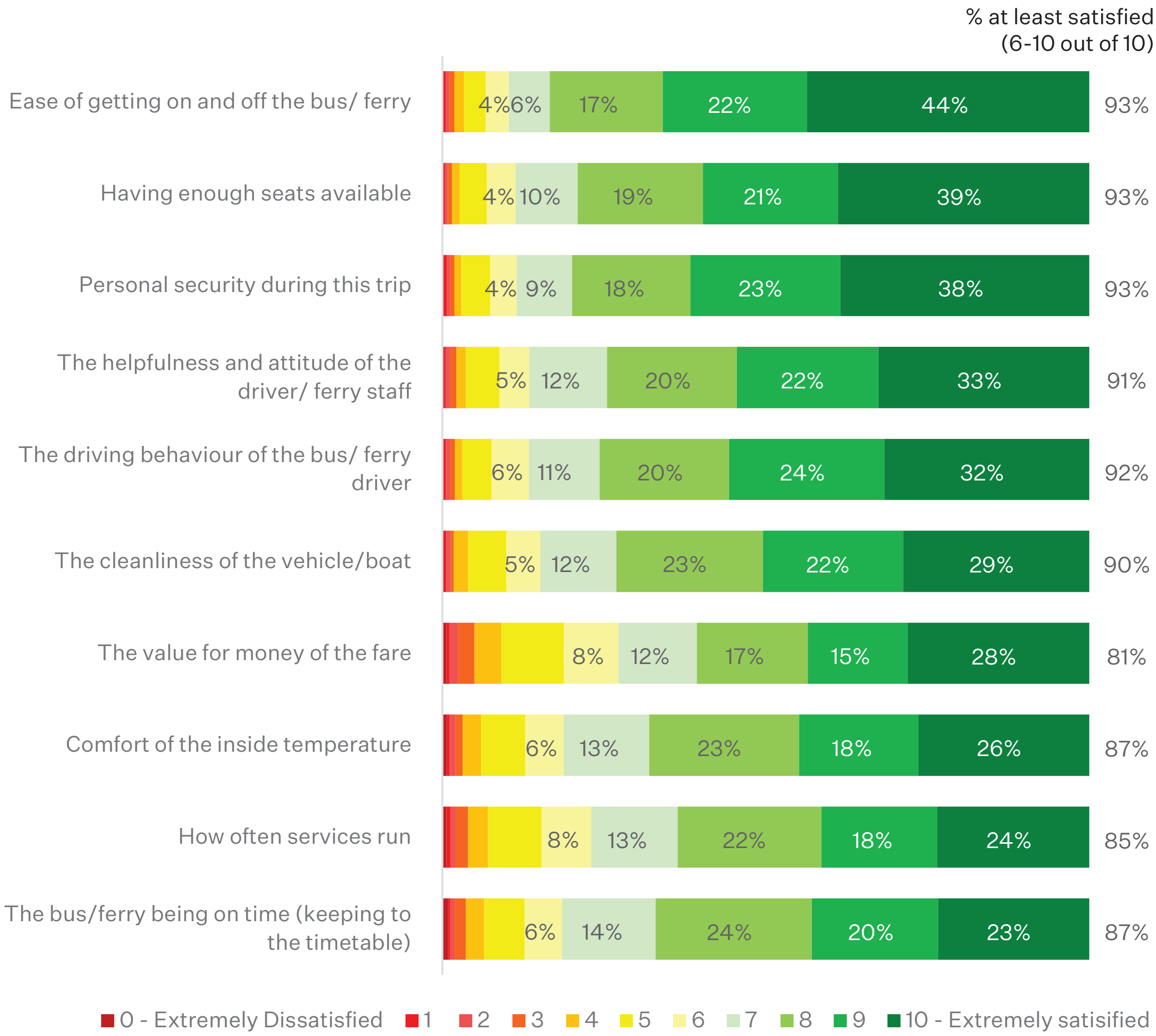
As in previous years, those who use the service more frequently continue to have a slightly lower satisfaction rating. This is likely driven by the 18-24 age group who have a higher tendency than other daily users to be less satisfied with the bus service.

Figure 4.2: Trip satisfaction by user groups, scores of 9 or 10



There continue to be high overall levels of satisfaction (rating of 6+) across most of the service areas. The areas where improvements could be made include value for money and the frequency of the service.

Figure 4.3: Satisfaction with service areas



When looking at the most positive service ratings (9 or 10 out of 10), ease of getting on/off the vehicle, personal security, and having enough seats available on the bus continue to be the areas that provide the greatest satisfaction. However, these measures show slight declines since 2020, as do the other service areas, part of which can be attributed to issues with sampling in 2021.

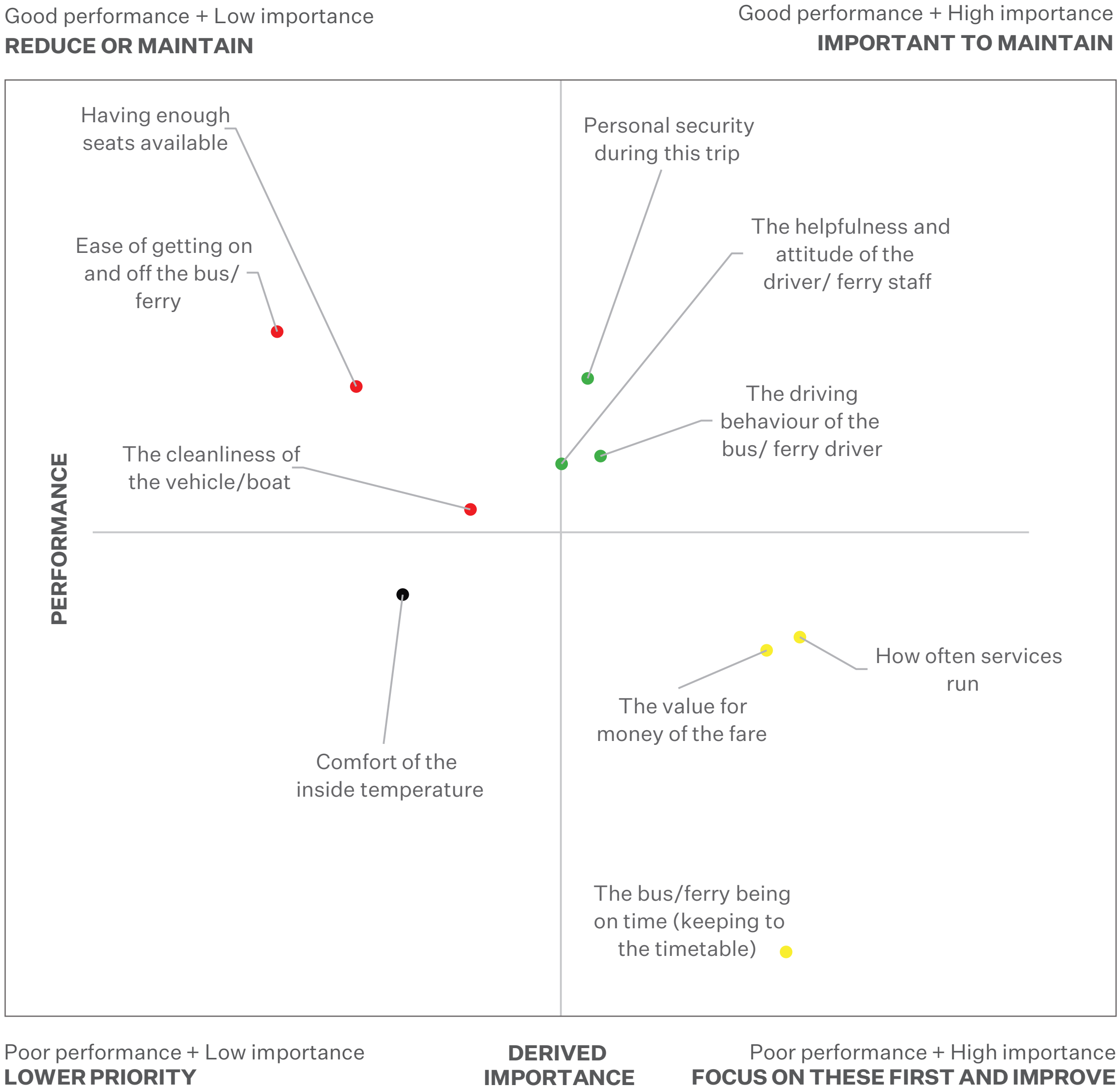
Table 4.2: Satisfaction with service areas, scores 9 or 10

	% satisfied (9-10 out of 10)		
	2021	2020	Change
Ease of getting on and off the bus/ferry	66%	68%	-2%
Personal safety during this trip	62%	64%	-3%
Having enough seats available	60%	62%	-2%
The driving behaviour of the bus/ferry driver	56%	61%	-6%
The helpfulness and attitude of the driver/ferry staff	54%	59%	-5%
The cleanliness of the vehicle/boat	50%	50%	0%
Comfort of the inside temperature	45%	49%	-4%
The bus/ferry being on time	43%	47%	-5%
The value for money of the fare	44%	46%	-2%
How often services run	42%	45%	-4%

Derived importance uses key driver analysis to understand the degree to which each of the bus service KPIs impact on overall satisfaction.

- This analysis shows that the critical areas to improve (in the bottom right quadrant) are timeliness, the perceived value for money of the fare, and how often the bus service runs. Their sustained presence as a pain point over the years highlights that ECan and the bus operators need to formulate strategies to improve the perceptions of the service areas.
- The top right quadrant shows that personal security and driver behaviour remain highly important in driving overall satisfaction, consistent with previous years.
- Service areas on the left-hand side are relatively less important in influencing overall satisfaction levels. However, it is worth noting that the perception of vehicle cleanliness has improved since 2020.

Figure 4.4: Derived importance matrix - Christchurch 2021



In the 2021 survey, users were asked about how they felt about changes made in September 2020 where a single brand for all buses was launched and changes were made to the appearance of Metro bus's exterior or interior.

An analysis of the open-ended responses shows that most users generally have no thoughts or opinions about the changes, so long as the service meets their needs. However, among those that did offer a specific opinion, the general sentiment is that the older colour systems in particular were better and that while harmonising the design is good, it has made it more confusing for users to tell them apart. We have also included some verbatims to highlight these concerns.

Table 4.3: Change to bus brands and appearance

	%
No thoughts or opinions	42%
Preferred the old bus colours	16%
Confusing / difficult / hard to tell them apart	18%
Like new colours	11%
Like the new bus features	6%
Like the new look	6%
NET	100%

> “It's sometimes confusing just because I'm used to the old but its fine now.

> “Overall I haven't given it much thought. I miss being able to tell them apart.

> “Change over was confusing - took much effort to learn the new numbers system.

> “Colour is nice however the different route colours before were much better. needs a wider front door for wheelchairs.

> “Exterior colour blends with environment. Have to see Number and Destination from a distance. Different colours made this easier.

> “It was easier to identify when they were different colour. Interior has improved greatly though.

> “I like them very much. New colour is lovely. But bigger signs above window would surely help.

> “They're a lot nicer, cleaner, more room in between seating, more wheelchair accessible.

> “Frustrated as I have to very carefully watch the approaching bus for my ride home where as previously I could see by the colour of the bus. (5 different buses at my stop).

> “The interior is nice and comfortable. However due to colour this makes it extremely difficult to determine if it is the right bus. Colour associations with routes are helpful.

> “I quite like it, but I quite liked if before the changes too. But it has been easy to adapt to.

> “The different colours were useful but on the other hand I rather like the blue.

Section 5

Satisfaction with public transport

Summary

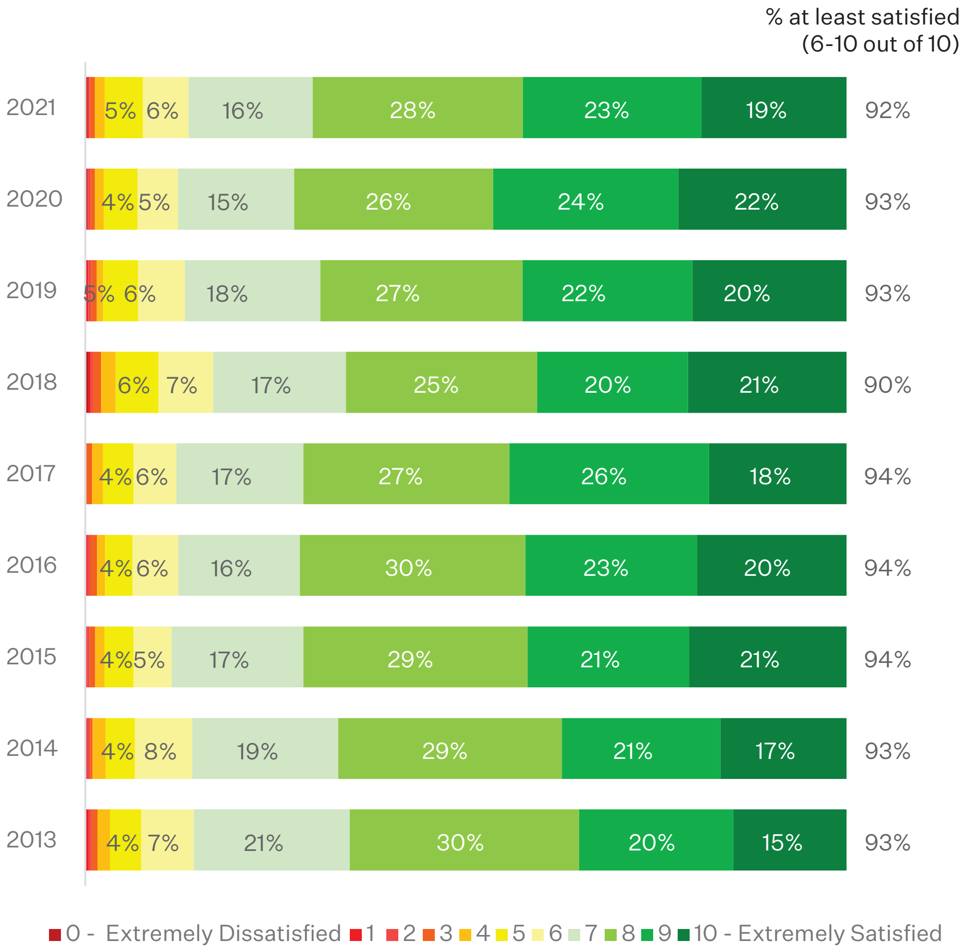
Satisfaction with public transport overall continues to remain high over the years despite challenges in the operating environment.

1	Satisfaction levels with public transport are broadly consistent with the levels reported in 2020.
2	Satisfaction remains high among users who are 65+ years of age and SuperGold card users, who are also in the 65+ year category.
3	Convenience of payment, the ease of getting information, and travel time receive the highest levels of satisfaction.
4	Quality and availabilty of bus shelters, as well as information about service delays, have consistently received the lowest satisfaction ratings over time.
5	Likelihood to recommend public transport continues to be strong, consistent with the 2020 results. However, there was four percent increase in the proportion of neutral customers.

Overall satisfaction with public transport

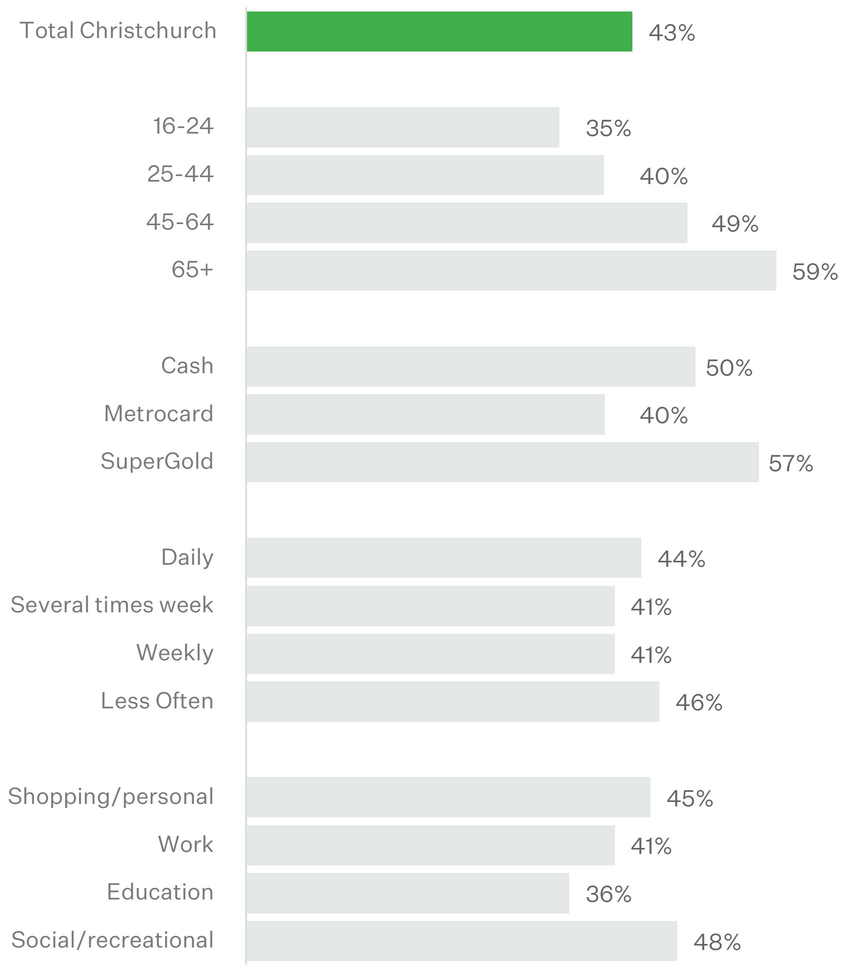
Overall satisfaction with public transport remains very high and comparable to previous years, despite a challenging operating environment (due to COVID-19) and changes to patronage behaviours.

Figure 5.1: Overall satisfaction with public transport



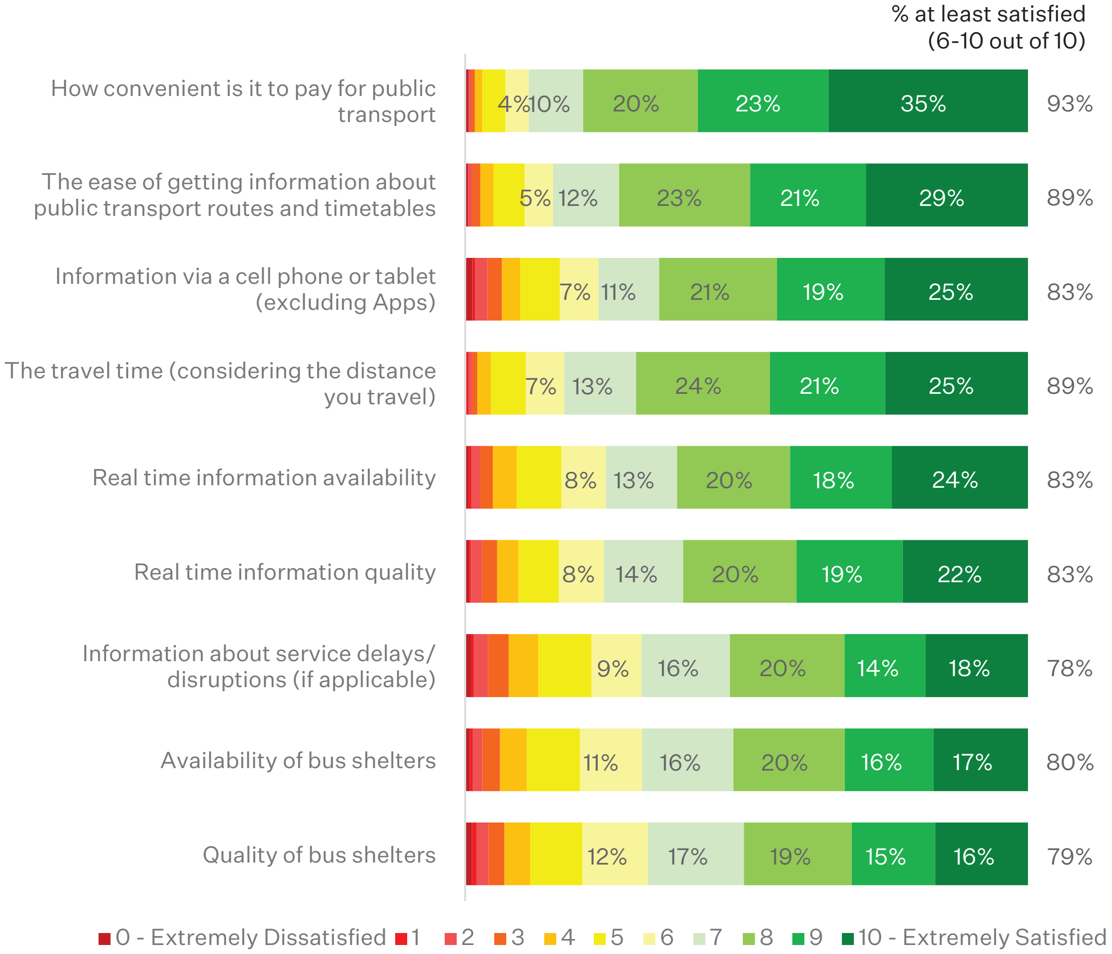
Satisfaction with public transport continues to be higher among those who are older (65+) with a SuperGold card (free off-peak travel).

Figure 5.2: Public transport satisfaction by user groups, scores 9 or 10



Public transport users remain highly satisfied with the convenience of payment and the ease of getting information about public transport. The areas of opportunity for improvement are bus shelter quality and availability as well as information about delays or disruptions.

Figure 5.3: Satisfaction with public transport areas



Similar to trends in the service areas, the high levels of satisfaction (those scoring 9 and 10) with public transport areas show declines in 2021. Information access appears to be an issue with patrons noting that large declines were linked to

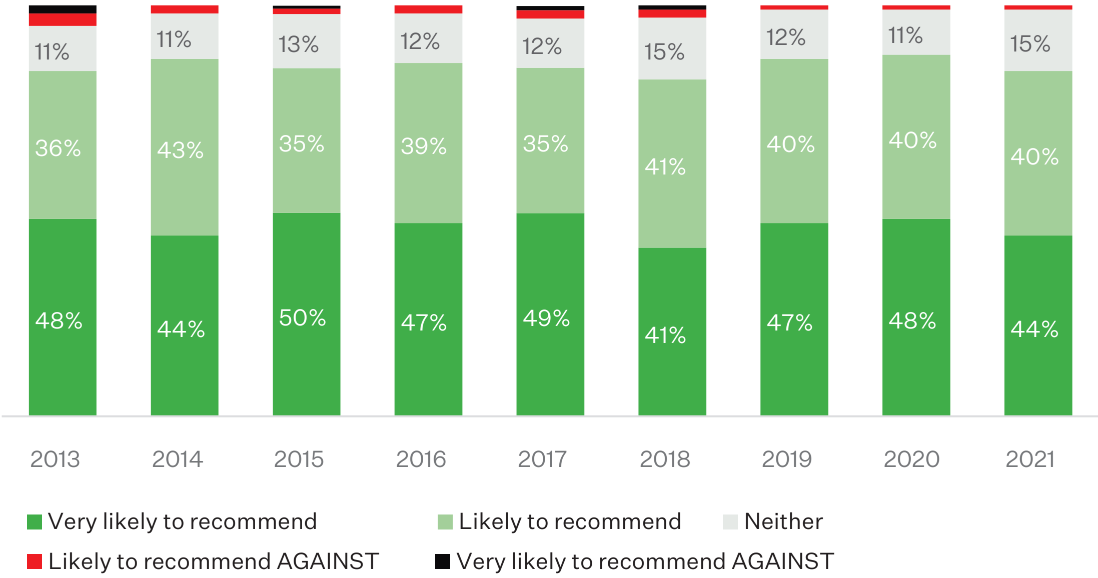
- the ease of getting information about public transport routes and timetables;
- information via a cell phone or tablet (excluding Apps);
- information about service delays/disruptions.

Table 5.1: Satisfaction with public transport areas, scores 9 or 10

	% satisfied (9-10 out of 10)		
	2021	2020	Change
How convenient is it to pay for public transport	59%	62%	-4%
The ease of getting information about public transport routes and timetables	49%	57%	-8%
Accessing information via a cell phone or tablet (excluding Apps)	45%	51%	-7%
The travel time (considering the distance you travel)	46%	48%	-2%
Real time information availability	42%	46%	-4%
Real time information quality	41%	43%	-2%
Information about service delays/disruptions (if applicable)	33%	39%	-6%
Availability of bus shelters	33%	34%	-1%
Quality of bus shelters	31%	33%	-2%

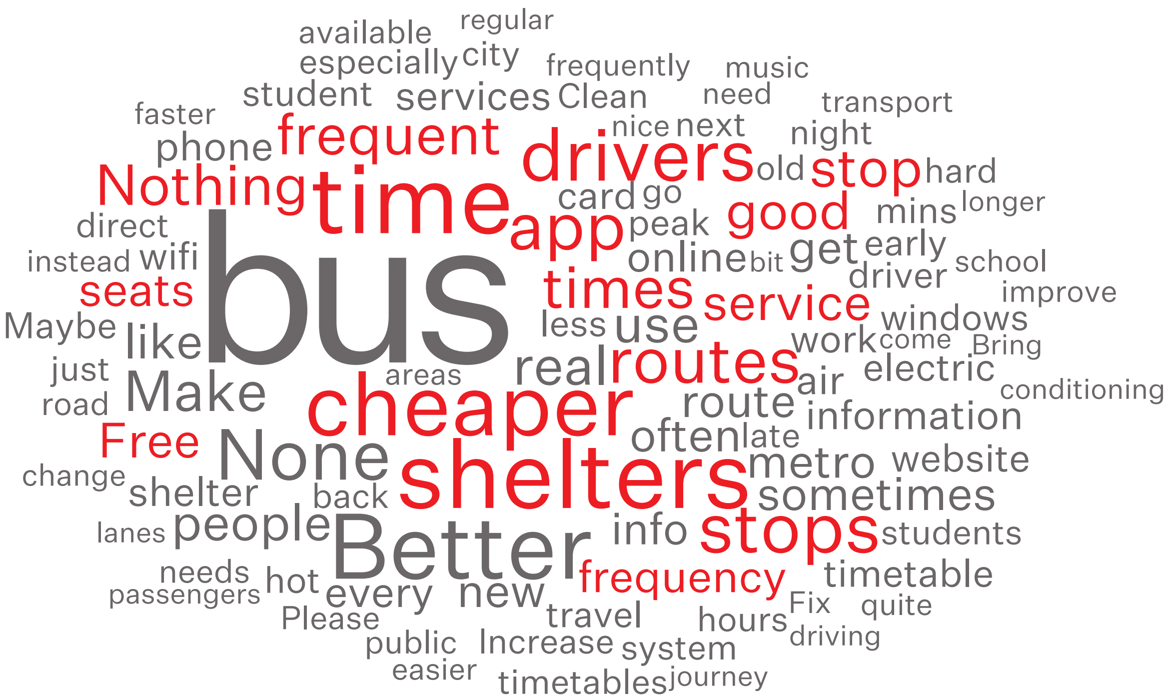
Overall, the likelihood of recommending public transport remains relatively high, albeit with a 4 percent decline in the users that are "very likely to recommend", offset by a rise in neutral customers. This does not appear to be a trend of concern as similar patterns have been observed in the historical data.

Figure 5.4: Likelihood to recommend public transport



When asked about any areas to improve, a range of comments were provided. The word cloud below demonstrates some key themes at a glance, with most users wanting to see further improvements to the public transport network.

Figure 5.5: Suggested improvements



Some of the most common suggestions for improvement relate to access to information about various bus services, timeliness, value for money, bus shelters, and driver behaviour. Some of the comments on these suggested improvements include:

> “Dislike new live tracking site- can’t drag to find new stops and live tracking only works half the time. It’s difficult to get next bus info.”

> “I have found on the Metro website it would be helpful when selecting your route for it to tell the exact direction of the bus you need to take. If you do not know the one, it is easy to get on the wrong bus. e.g. route 28 can go in two directions from the bus interchange and the website may not tell you the exact name of the bus in detail that you need to catch.”

> “The new next bus feature sometimes malfunctions and only displays the due time rather than minutes, which doesn’t indicate if the bus has already gone past.”

> “Services being available at more standard times e.g. one bus every 10 minutes instead of one bus 10 minutes and the next 20 mins.”

> “More signage in buses to tell people where they are and where they are going. e.g. a simple map....”

> “More frequent buses in the early morning - 6am-ish. Cheaper fares - need as much incentive as possible to increase usage. Many of my colleagues dislike busing.”

> “Free for under 18. Cheaper for Uni students. Cheaper for general public. More seats and shelters.”

> “Free fares, it will lower expectations but $4.20 for an adult is counter-intuitive to climate change.”

> “Lights at the bus shelters that aren’t the street lights. Make it easier for drivers to see the people waiting for the bus.”

> “Bus shelters that actually shelter you from bad weather; .... Real-time bus tracking that works.”

> “Fares could potentially be a bit cheaper i.e. $2.50 for an adult.”

> “Connecting buses on time.”

> “Be more clean and on time.”

“Please be on time, sometimes buses run late.”

“Some drivers don’t seem to notice when a passenger wants to get off the bus.”

“Better drivers’ attitudes Greater concern re Covid and mask wearing - going up levels.”

“Some drivers speed, some heavy on the breaks, gives you whiplash! Wifi on the bus and at the interchange.”

“Not sure why some bus drivers don’t wear masks. Some bus drivers have road rage.”

Section 6

Information and infrastructure

Summary

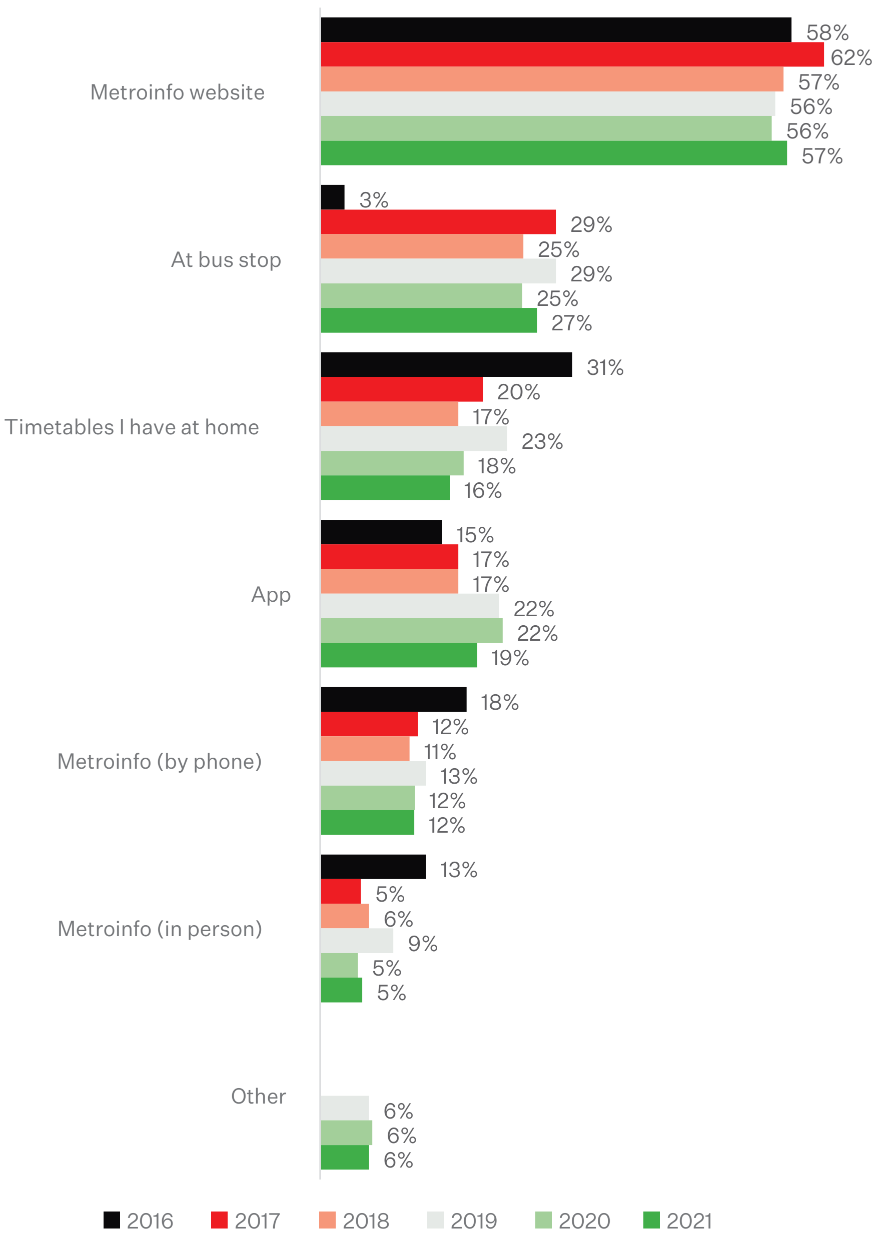
1	The Metroinfo website remains the main source of service information for Christchurch passengers, consistent with previous years.
2	Over 80 percent of patrons continue to get to their bus stop by walking. Typically this takes just over seven minutes, similar to year 2020 results.
3	Metrocard remains the most dominant form of bus payment as cash use continues to decline to around 1 in 10 passengers.
4	Those who use cash to top up their Metrocard find it more convenient.
5	Six in ten current passengers have a drivers license; this proportion of bus patrons has been consistent over the past five years.

Timetables

For Christchurch passengers, the Metroinfo website remains the key portal for information about the bus service. However, information at the bus stop and via timetables kept at home are also key sources.

Use of the App shows a marginal decline from the 2019/20 peaks of 22 percent to 19 percent. This drop is potentially associated with the issues linked to information access and quality discussed above; therefore, the decline in use might indicate perceptions among patrons regarding the App's usefulness/ effectiveness.

Figure 6.1: Information sources

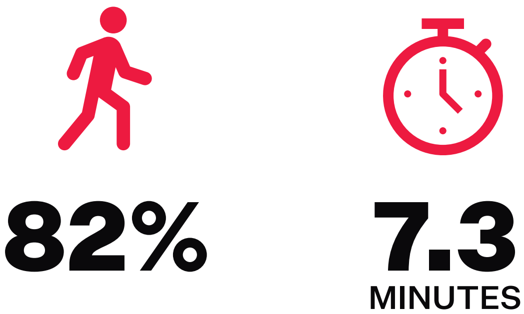


Getting to the bus stop

Almost all bus users walk to the bus stop, taking an average of just over seven minutes. These results are similar to 2020 figures.

Also similar to 2020, 1 in 10 transfer via another bus and seven percent drive or are driven by someone else.

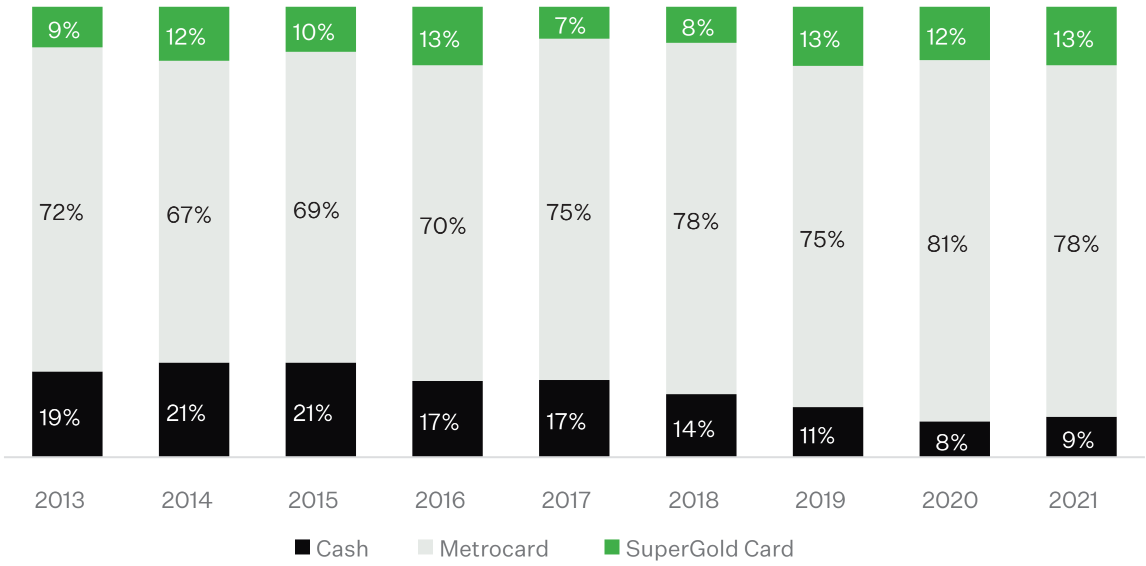
Figure 6.2: Travel to the bus stop



Payment

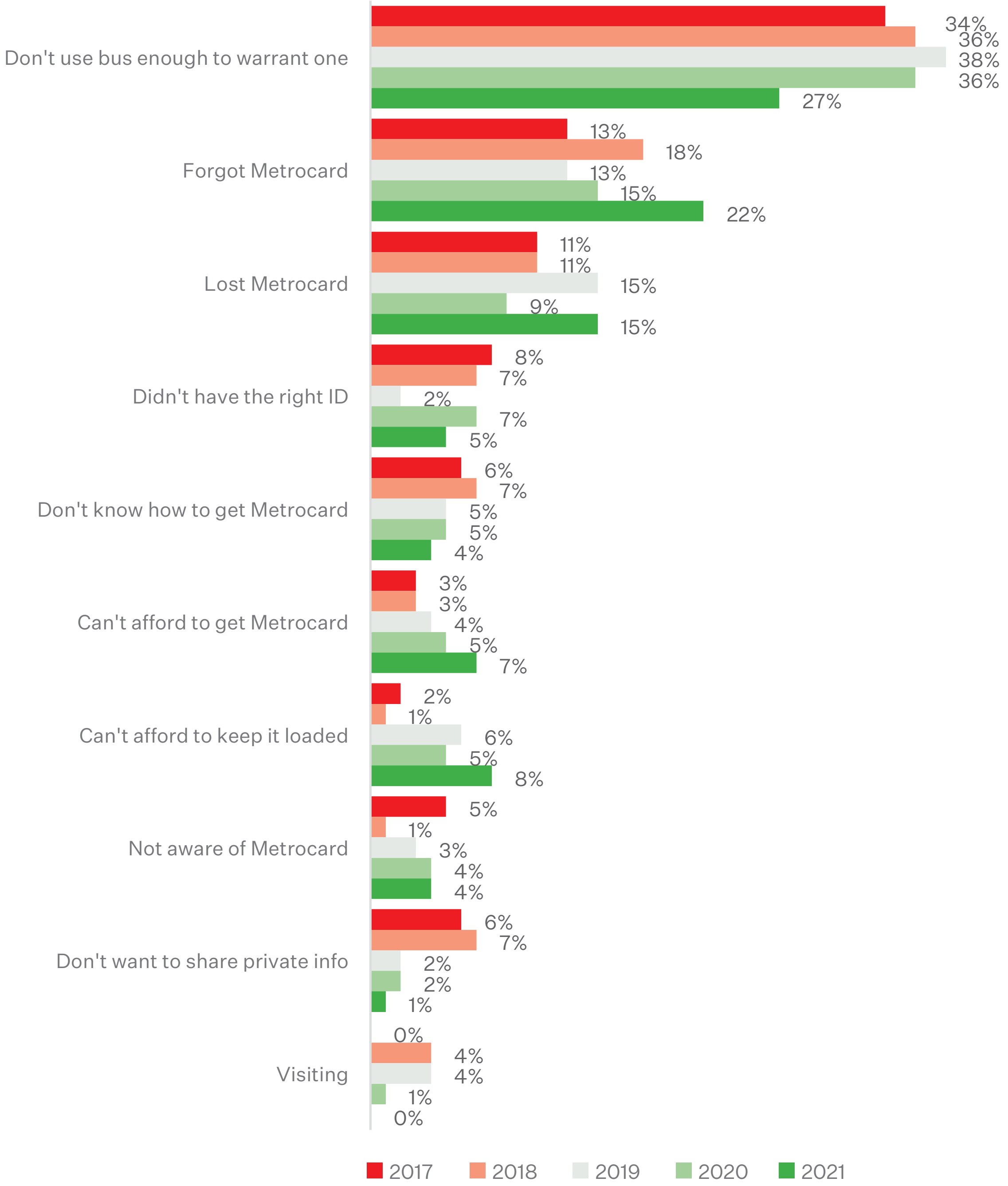
Metrocard continues to be the dominant payment form and is still used by four out of five patrons. Cash use is stable when compared to 2020 levels. In the current operating environment, we see a broader preference towards electronic and contactless forms of payment. This trend was well underway even before COVID-19, which served to expedite the process.

Figure 6.3: Payment Type



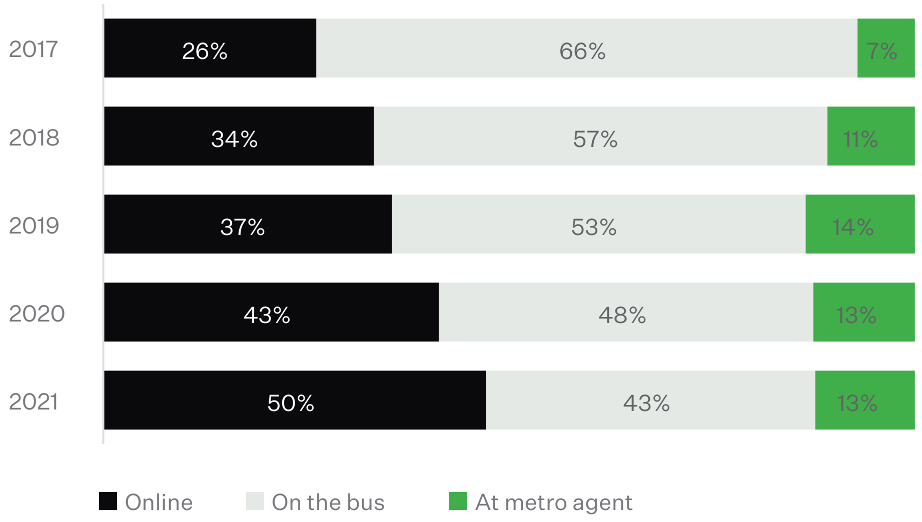
The most common reason for paying cash continues to be the infrequent use of the bus service, while the proportion of patrons who reported having forgotten or lost their Metrocard increased in 2021.

Figure 6.4: Reasons for paying cash (those who paid by cash)



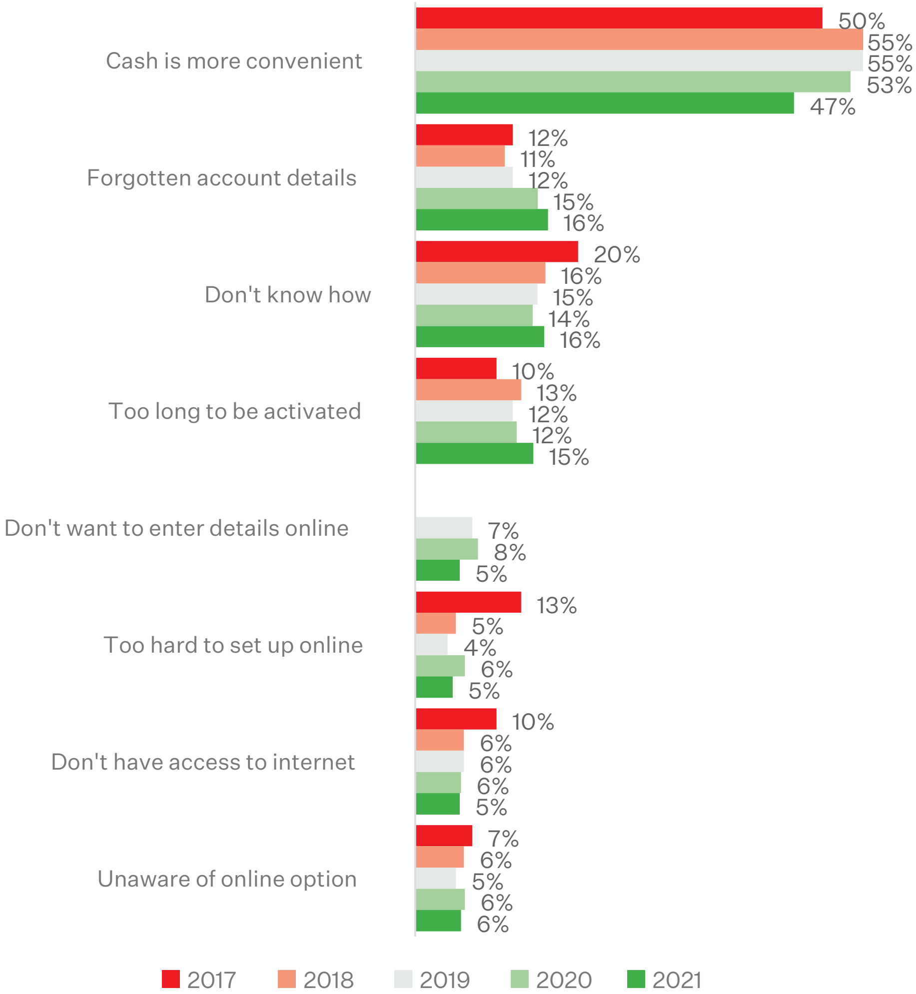
While the majority still top up their Metrocards on the bus, there has been a sustained increase in those topping up online. As mentioned earlier, this reflects the overall shift in the purchasing behaviours of consumers across New Zealand, with a greater preference for electronic or contactless payment methods.

Figure 6.5: Form of Metrocard top up (those who paid by Metrocard)



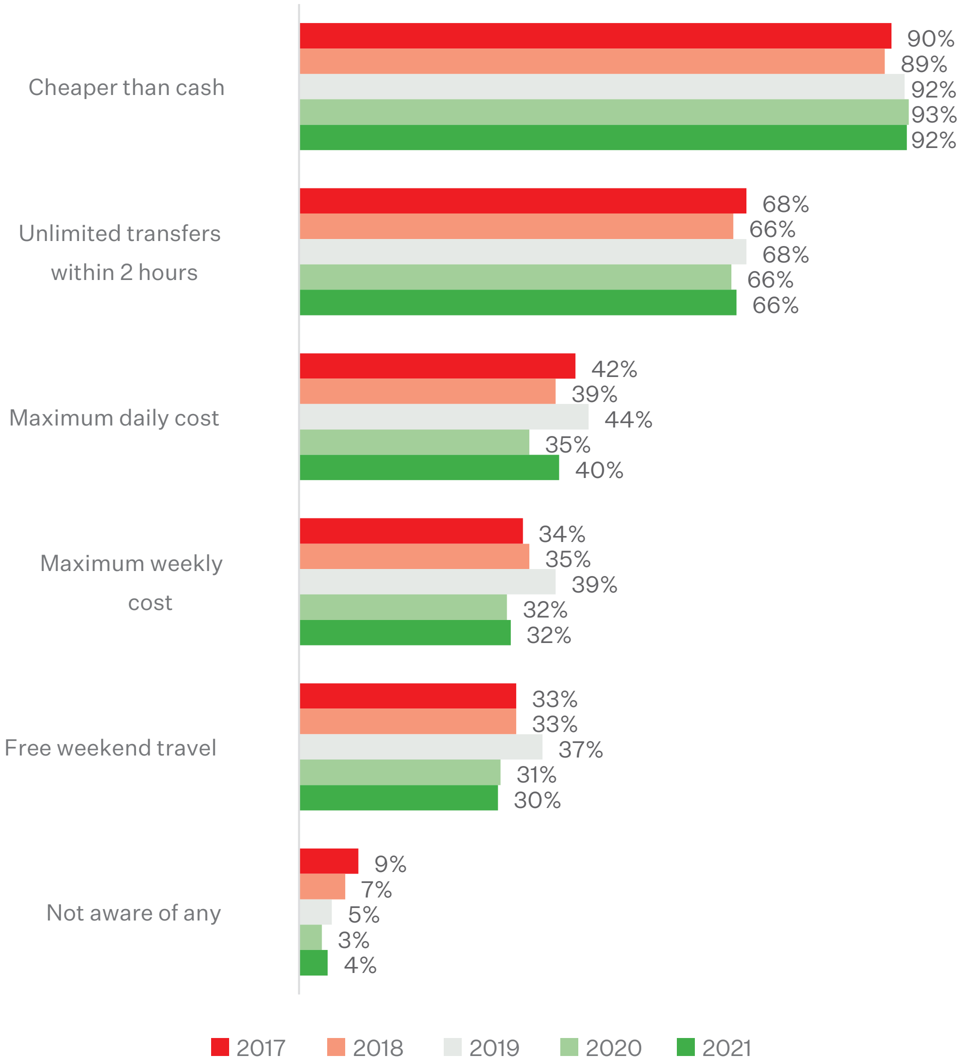
Those who top up by cash continue to feel that it is more convenient.

Figure 6.6: Reasons for not topping up online (those who paid by Metrocard)



Awareness of Metrocard benefits remains at the same level as previous years.

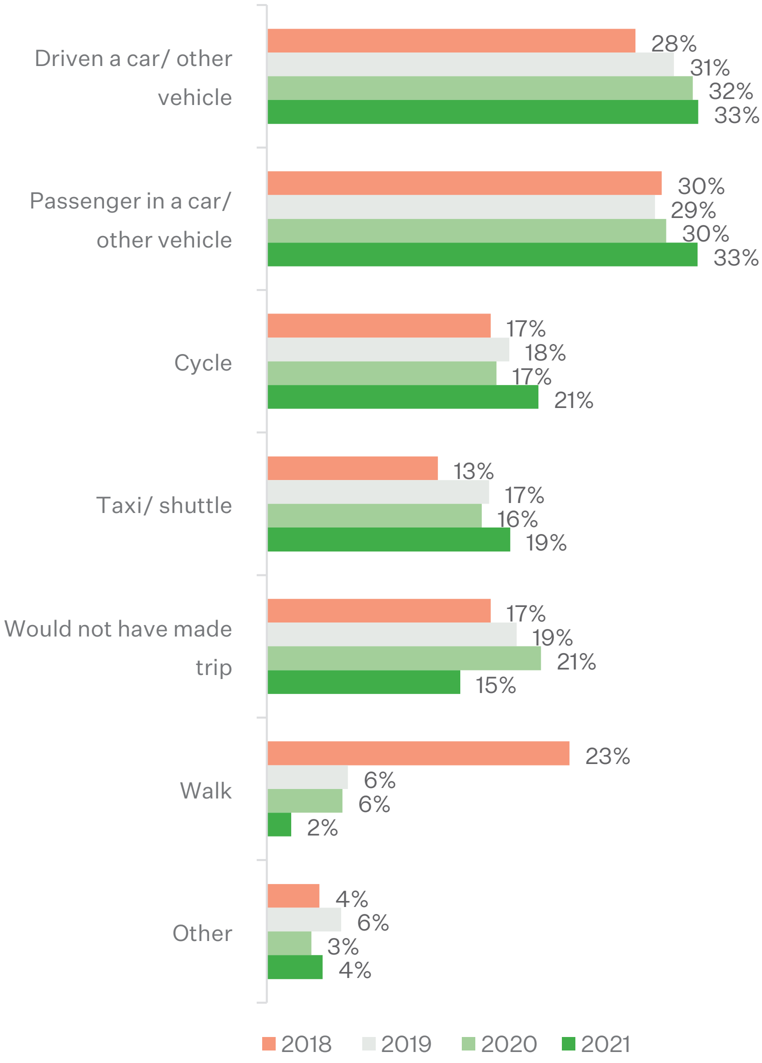
Figure 6.7: Awareness of Metrocard benefits



Alternate transportation

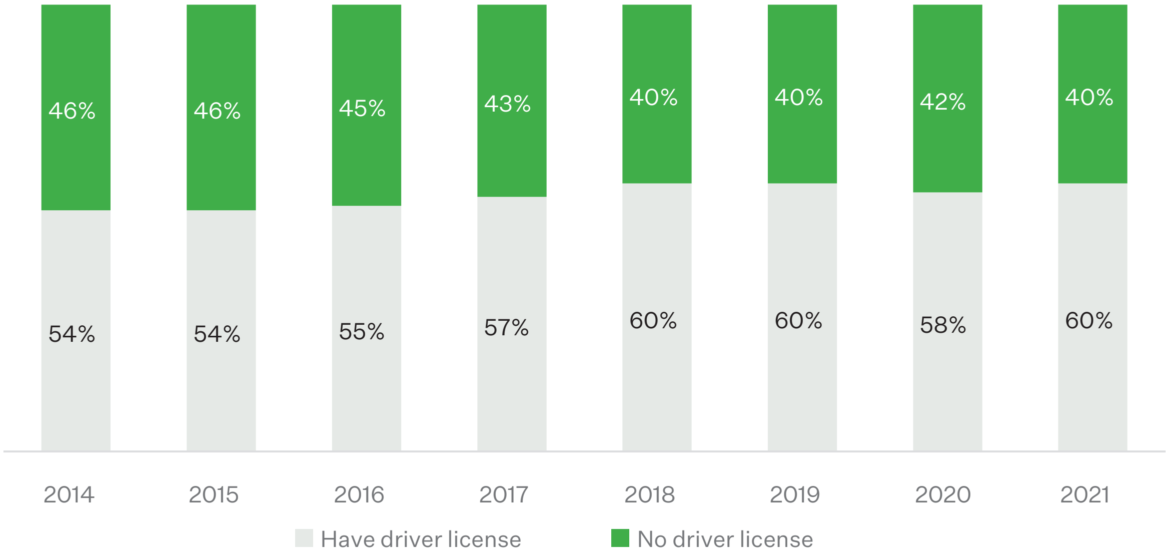
As in previous surveys, the majority of public transport users would have driven a car or been a passenger in a car if public transport had not been available. Meanwhile, the proportion of people who would not have made the trip at all if public transport had not been available declined from last year, with more people indicating a preference for other modes of transport like cycling or taxis/shuttles.

Figure 6.8: Alternative transport modes



The number of public transport users who hold a driver licence is stable at 60 percent. New Zealand has the fourth-highest rate of per-capita car ownership in the world and one of the lowest rates of patronage of public transport in the world[1]. Therefore, it is unsurprising that 3 in 5 public transport users already have a driver license.

Figure 6.9: Public transport users with driver licence



1 https://www.auckland.ac.nz/en/news/2021/02/18/nz-car-ownership-culture-cant-be-future.html#:~:text=New%20Zealand%20has%20the%20fourth,public%20transport%20in%20the%20world.

Section 7

Conclusion

Overall, the Christchurch bus service and public transport are high quality services that continually keep their users highly satisfied. This is against a backdrop of COVID-19, changes to patronage figures, and changes to the way people live, work, and undertake education in response to constantly changing circumstances. ECan will continue to benefit from ongoing engagements such as the Metro User survey, as it provides the Council will reliable metrics on how well the service and Council are performing in the eyes of bus service users.

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