



# Environment Canterbury Christchurch Metro User Survey 2020

November | 2020

**Prepared for** Lance Hammond, Business Improvement Specialist

**Prepared by** Research First





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## Background



## 1.1 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 monitor 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, providers and regions.
- Trends and identifies opportunities for improvement.

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

- Understand who the users are 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.
- Investigate how users view the different operators and the overall system.

## 1.2 Impact of COVID-19

Typically, the Metro User survey is conducted for six weeks in April and May of each year. Due to impact COVID-19 restrictions, that was not possible in 2020. Initially, data collection began at the start of August. A further change to New Zealand COVID-19 levels meant that data collection had to stop and restart in September. Dates of data collection were:

- August 1st – August 12th
- September 27th – October 14th

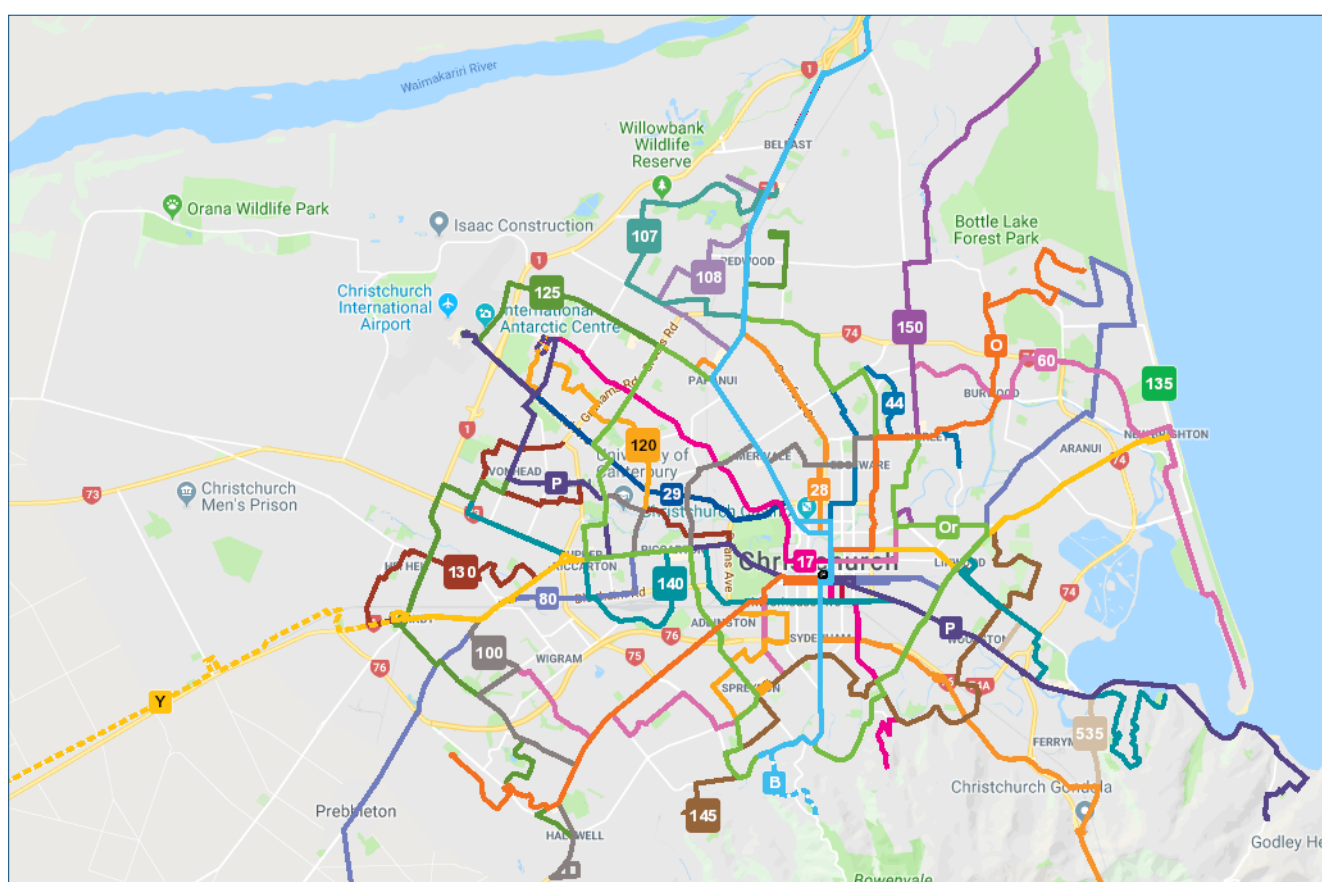
Due to concerns around cash handling, the bus service was free for several months in 2020 between April – June.

The changes outlined above may have had some influence on satisfaction levels.

### 1.3 Method

Passengers were interviewed whilst on the buses, with 2,000 interviews being completed in Christchurch and 200 in Timaru. Quotas were set up to match passenger numbers, routes and time of day based on adult patronage figures as interviewing was conducted with those aged 16 years and over.

Due to the ongoing impact of COVID-19 on bus use, 2019 patronage statistics were used to determine the sample profile for routes and times.



**Table 1 2020 Christchurch sample summary**

<b>N=2,131</b>	<b>Number of interviews</b>	<b>% of total sample</b>	<b>2019 Adult patronage figures</b>	<b>2019 Total patronage figures</b>
Go Bus	1,501	70%	70%	65%
Red Bus	608	29%	29%	25%
Black Cat	20	1%	1%	10%
Ritchies (Christchurch only)	12	0%	0%	0%

## 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 is largely consistent with 2019.

**2**

Metrocard use is increasing over time, cannibalising cash usage. Fewer than one in ten used cash for their trip in 2020.

**3**

Daily users of the service are decreasing over time. While no statistically significant changes were noted between 2019 and 2020, the past four years has seen daily usage drop 9%. This is something we will continue to monitor over subsequent years to ensure this is not a phenomenon due to COVID-19.

**4**

Over half are in employment, with work being the most frequent reason for using the bus service.



## Bus Service Satisfaction Remains High

**1**

Trip satisfaction continues to exceed the Long-Term Plan 2018-2028 target, reaching 96%.

- 55% of users rate the trip satisfaction as a 9 or 10. This is the first time in five years that has seen an increase to the high satisfaction levels.

**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/off the bus and feelings of personal security, have the highest ratings.
- Timetabling, frequency of service and value for money continue to receive the lowest satisfaction. These are important drivers of overall satisfaction so are the key priority areas to focus on improving.



## Satisfaction with the Overall Bus System is Very Positive

- 1 Satisfaction with public transport also remains very high among existing users, and especially so among those aged 65+.
  - Convenience of payment and the ease of getting information received the highest levels of satisfaction.
  - Quality and availability of bus shelters continue to receive the lowest satisfaction ratings, along with information about delays or disruptions.



## Digital Behaviour is More Prevalent in Christchurch than in Timaru

- 1 When sourcing timetable information, the Metroinfo website is most commonly used, and use of the app has stabilised at its highest level (22%).
- 2 Metrocard remains the most dominant form of payment, with the proportion of those topping up online continuing to increase, albeit still behind topping up on the bus.

## Christchurch User Profile





### 3.1 User Profile Summary

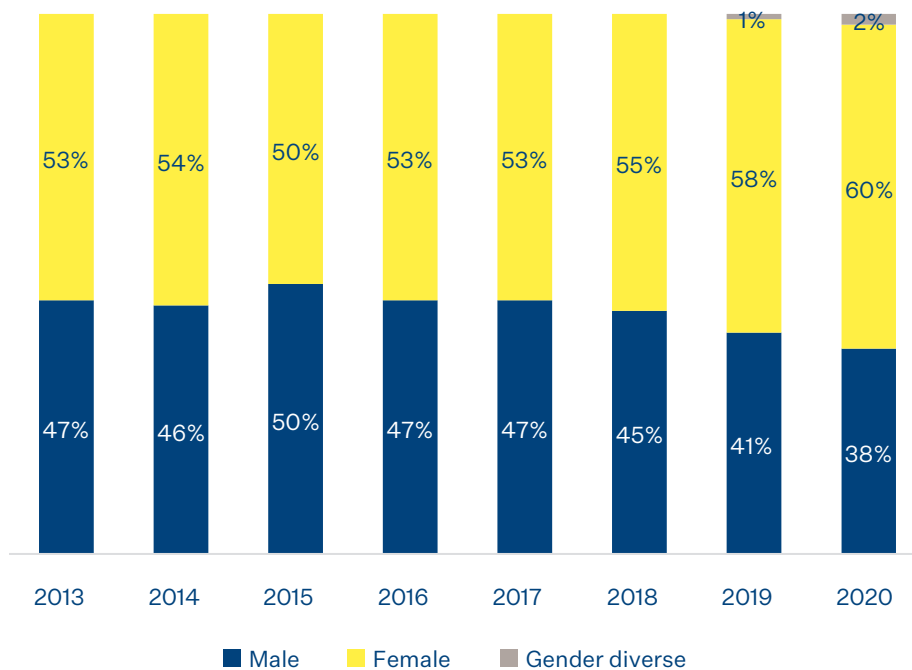
The passenger profile is generally consistent with previous years:

- |   |   |
|---|---|
| 1 | Slightly <b>more females than males</b> continue to use the bus service, and this is increasing.  |
| 2 | <b>Over half are employed full or part time</b> , with work therefore being the most common trip purpose.   |
| 3 | The <b>majority earn under \$40,000</b> , with only a minority (5%) earning over \$80,000. The number of users who are unaware or refuse the income question is increasing and are mostly retirees or students.             |
| 4 | The number of <b>16-24-year-old users is the lowest it has ever been at 33%</b> . This is consistent with 2019, however down on the previous year’s trend.  |
| 5 | Indicatively, there are <b>fewer daily users of the bus service</b> . While the decrease between 2020 and 2019 is small, the trend over time suggests that slowly users are using the bus service on a less frequent basis. |

### 3.2 Christchurch Bus User Profile

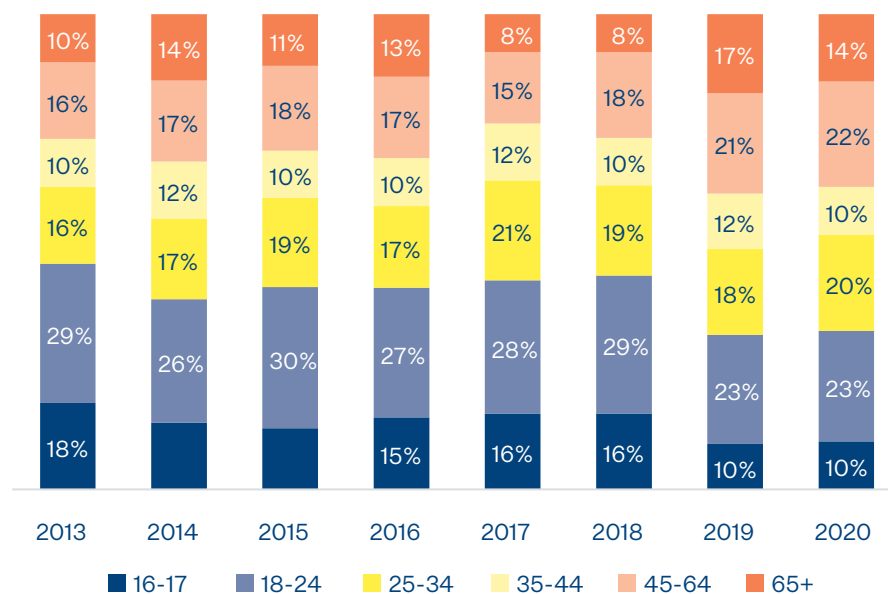
The proportion of females using buses is gradually increasing.

**Figure 1: Gender Profile, Over Time**



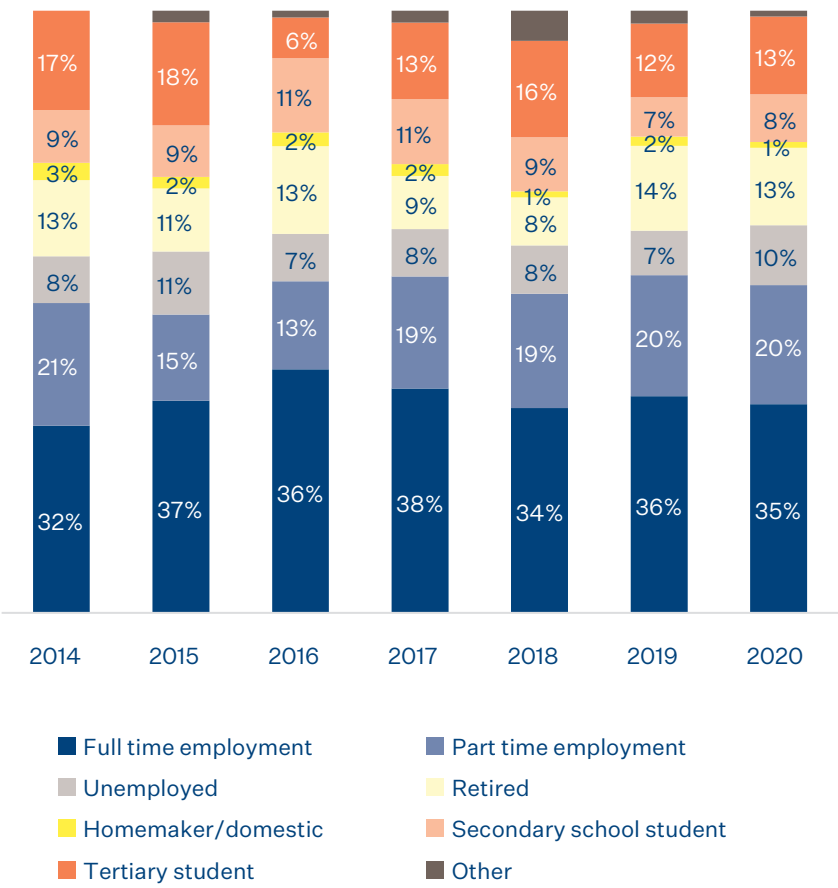
The age profile of bus users remains relatively stable with the 2019 findings.

**Figure 2: Age Profile, Over Time**



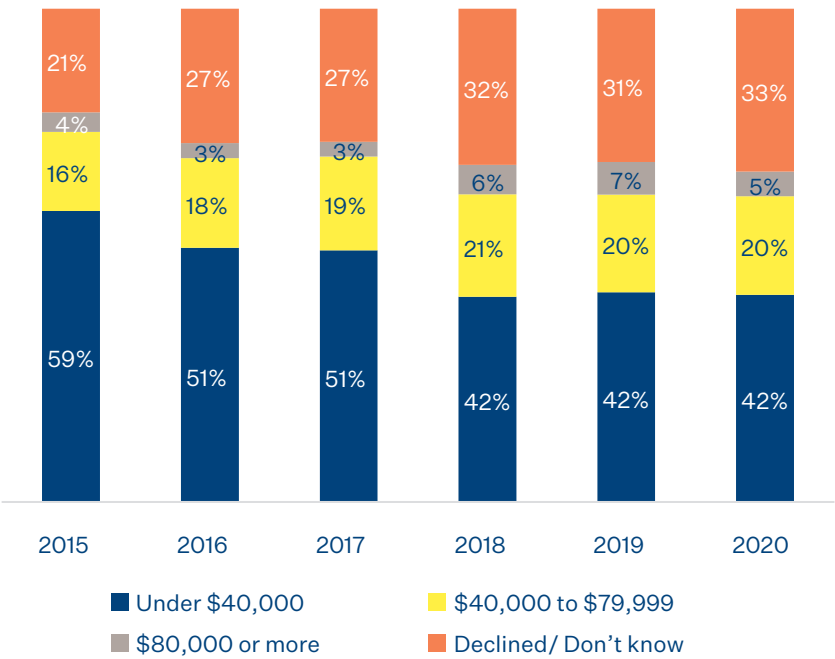
Employment is consistent with age, with more retirees and less tertiary students.

Figure 3: Employment Profile, Over Time



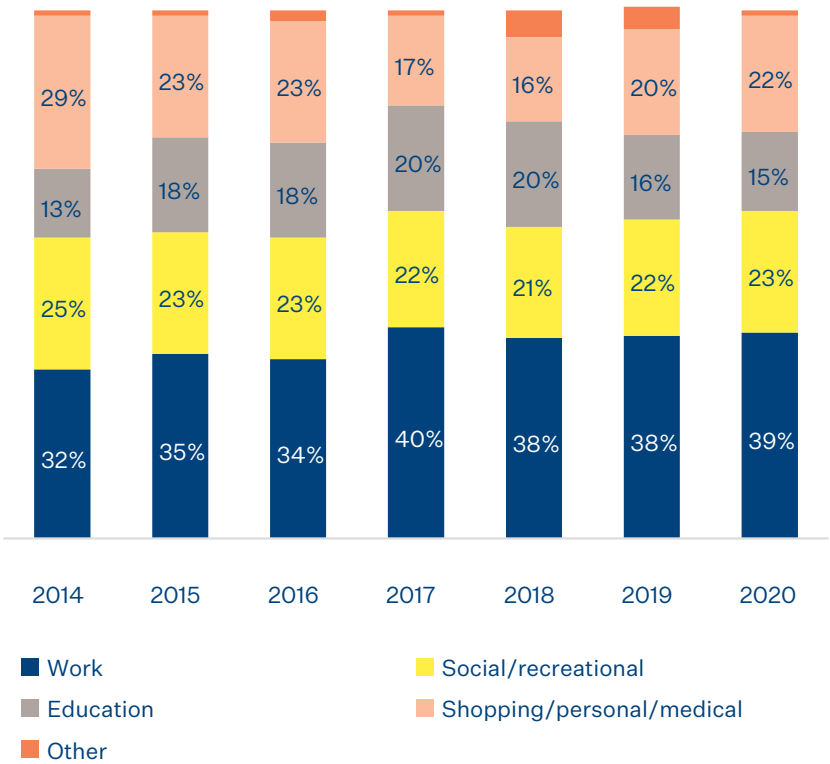
Income remains consistent with previous years. Those that use buses tend to earn less than \$40,000 per year. Those who declined or don't know skewed towards those who are students, unemployed or retirees.

Figure 4: Income Profile, Over Time



The main use of the bus service continues to be for work purposes. Those using the service for shopping, personal or medical has increased slightly this year, with those using it for education declining slightly.

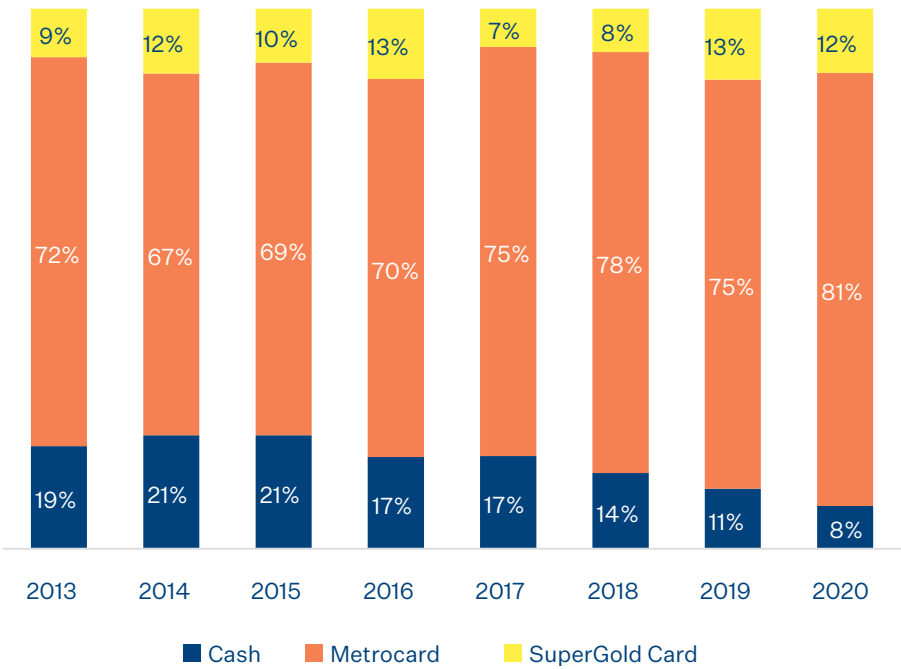
Figure 5: Main Trip Purpose, Over Time





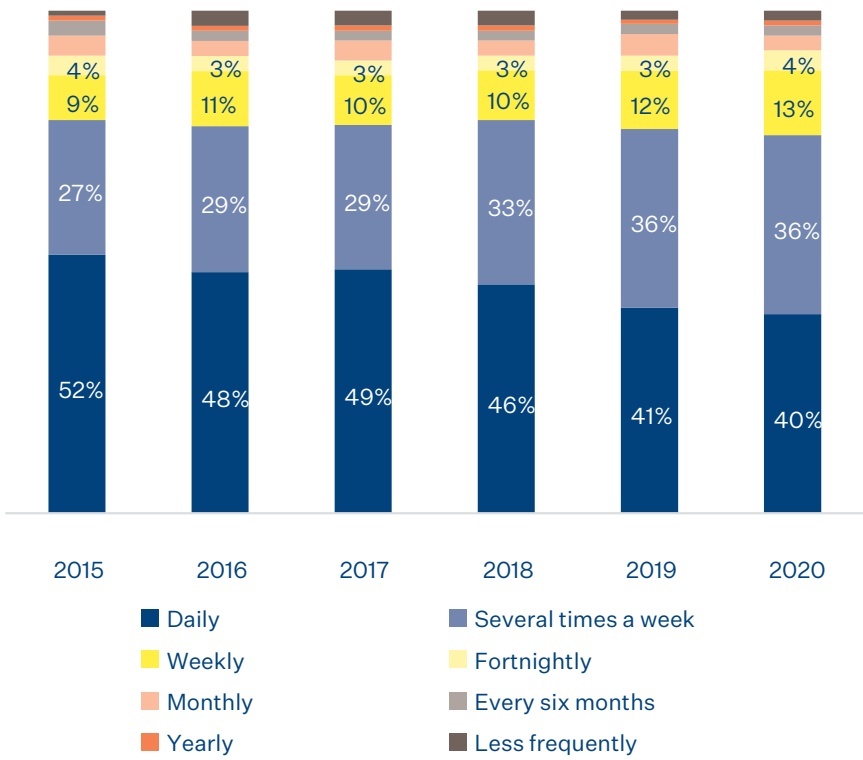
Metrocard continues to be the dominant payment form, now used by four out of five patrons. Cash continues to decline while SuperGold card use is stable.

Figure 6: Payment Type, Over Time



Frequency of use is stable with 2019. There is a slight decline in those who use the service daily, following the trend of the past three years.

Figure 7: Frequency of Use, Over Time



## Satisfaction with Trip

4



## 4.1 Summary

Overall satisfaction remains high:

- 1** The Long Term Plan **target continues to be met** with a satisfaction level of 96% (target 95%).
- 2** For the **first time in 5 years**, the **proportion of users giving the most positive rating** (scores of 9 or 10) **increased** and now is at 55%. There is still work to do to return to the high of 2016 (65% high satisfaction).
- 3** **Younger** users, **daily** users, and those travelling for **education** or **work** are generally a little **less satisfied**.
- 4** **Personal security** and **driver behaviour** continues to play an important role in providing a satisfactory service for users.
- 5** Three priority areas were identified to help drive satisfaction. **Timeliness, value for money** and **frequency** of the service have lower satisfaction than all other service areas and **should remain a focus for the bus service to improve**.
- 6** Results are reasonably consistent across the different bus routes. **Core routes are showing lower satisfaction** in most service areas compared to all other routes.

Most of the service areas also continue to have high satisfaction ratings.

- 1** Almost **all service areas** saw an increase in high satisfaction (9 or 10) levels.
- 2** Ease of getting on/off the bus, feelings of personal security and seat availability have the **highest satisfaction ratings**.

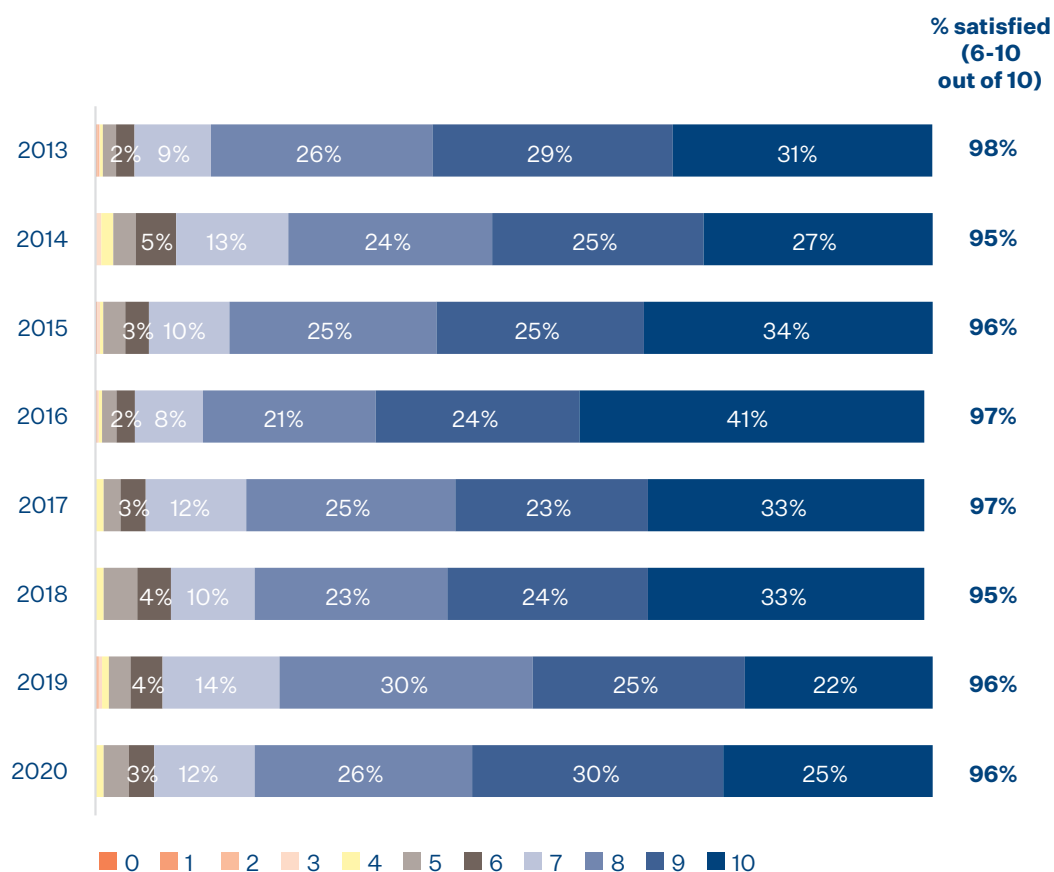
## 4.2 Christchurch Bus User Satisfaction



The 2018-28 Long Term Plan Target continues to be met, with over 95% of passengers satisfied or better with the overall bus service.

Satisfaction remains high amongst Christchurch bus users and the bus service continues to meet LTP targets. High satisfaction levels increased compared to 2019, with more users reporting a score of 9 or 10 out of 10.

**Figure 8: Overall Satisfaction, Over Time**



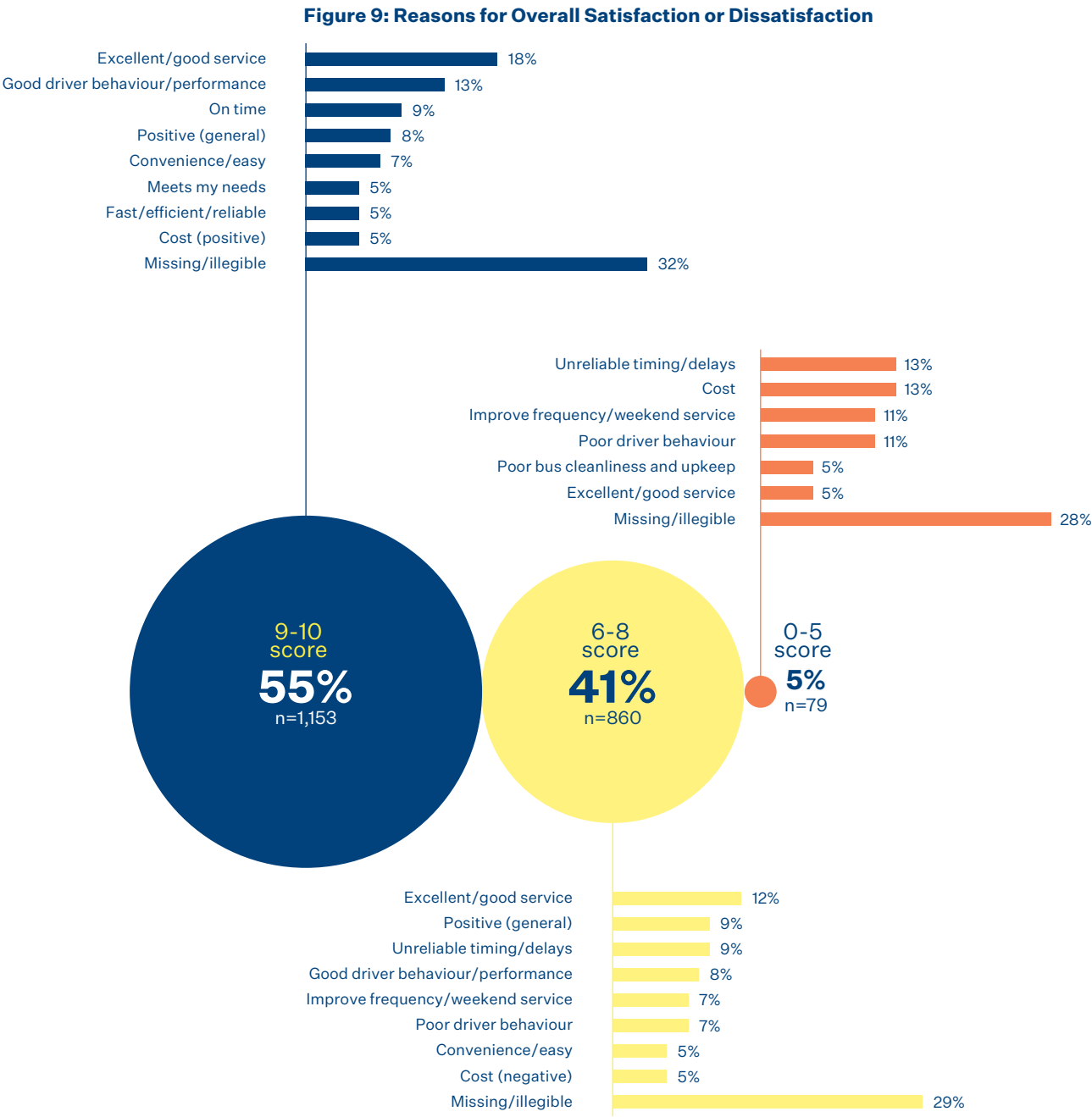
Bus users are primarily satisfied because of the good service. Drivers, timeliness, convenience and meeting the needs of users are all reasons provided for high levels of satisfaction. In contrast, any reasons for lower satisfaction are related to unreliable timing or delays and dissatisfaction with the frequency of service.

Those who provided a score between 0 and 5 mostly provided reasons for dissatisfaction. Unreliable timing or delays (13%), cost (13%), improving the frequency (11%) and poor driver behaviour (11%) were the most commonly recorded reasons for dissatisfaction for these users.

Those who scored between 6 to 8 provided mixed feedback. Encouragingly, the most common reason is that the bus service is good or excellent (12%). Unreliable timing (9%) was the most common area for dissatisfaction.

Those who score between 9 and 10 were overwhelmingly positive about the bus service in Christchurch.

The influence of driver behaviour is important to note. Those who score 0-5 mention poor driver behaviour (11%), while those who score a 9 or 10 mention excellent driver behaviour (13%). Those who provide the middling scores report a mix of both bad (7%) and good (8%) driver behaviour. This suggests that the bus drivers are highly influential for satisfaction. They are the memorable face of the public transport system, and it appears that users are sensitive to their behaviour.



Please note: only responses 5% or larger were reported for this graphic.



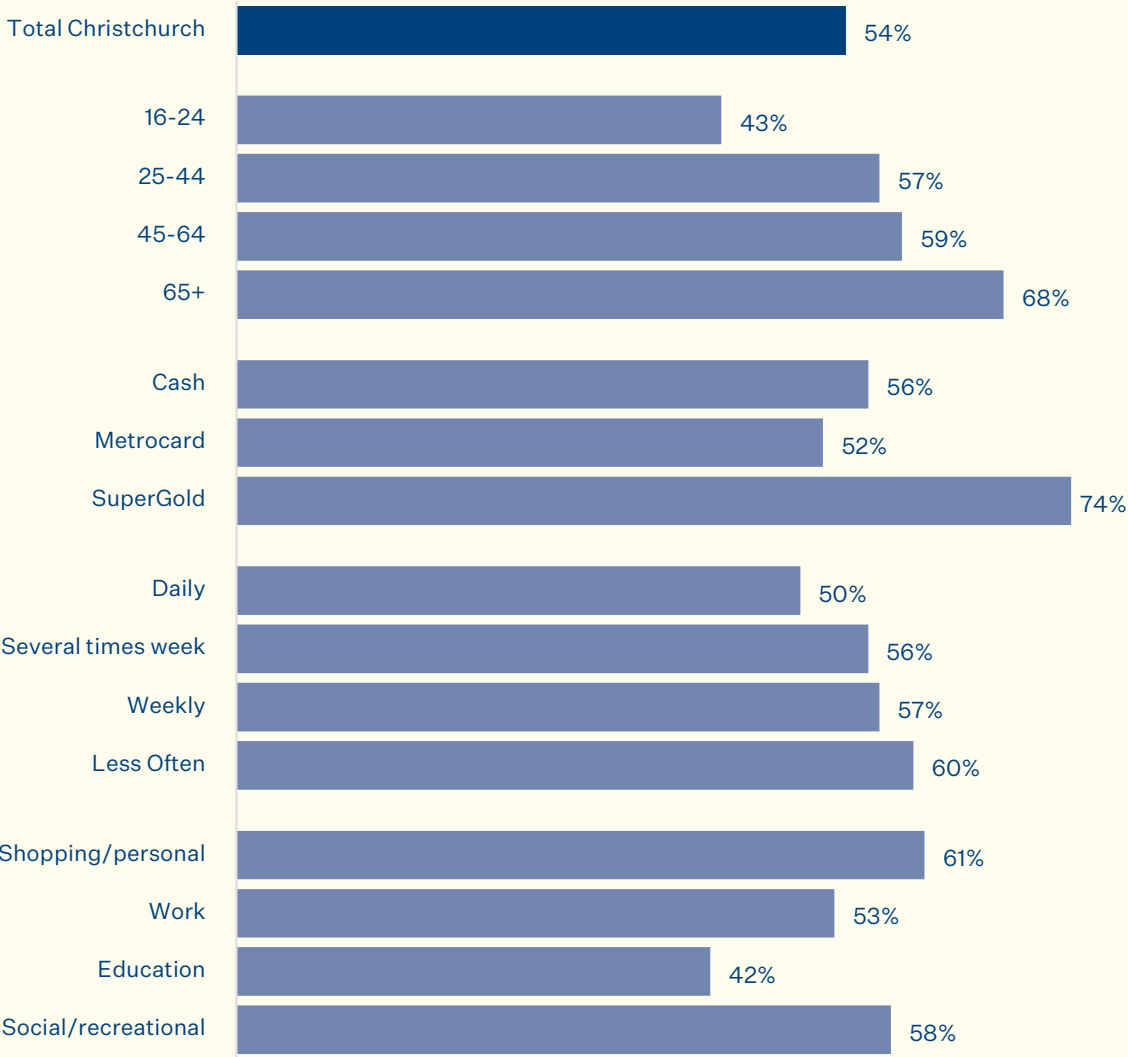
**SPOTLIGHT**

*Which Groups Have the Highest Overall Satisfaction with the Bus Service?*

Those who provided scores of 9 or 10 were highly satisfied with the bus service. High satisfaction levels increase with age and was highest among those aged 65+.

Those who use the service more frequently are likely have a slightly lower satisfaction rating. This is likely driven by the fact that those between 18-24 are significantly more likely to be daily users compared to all other age groups.

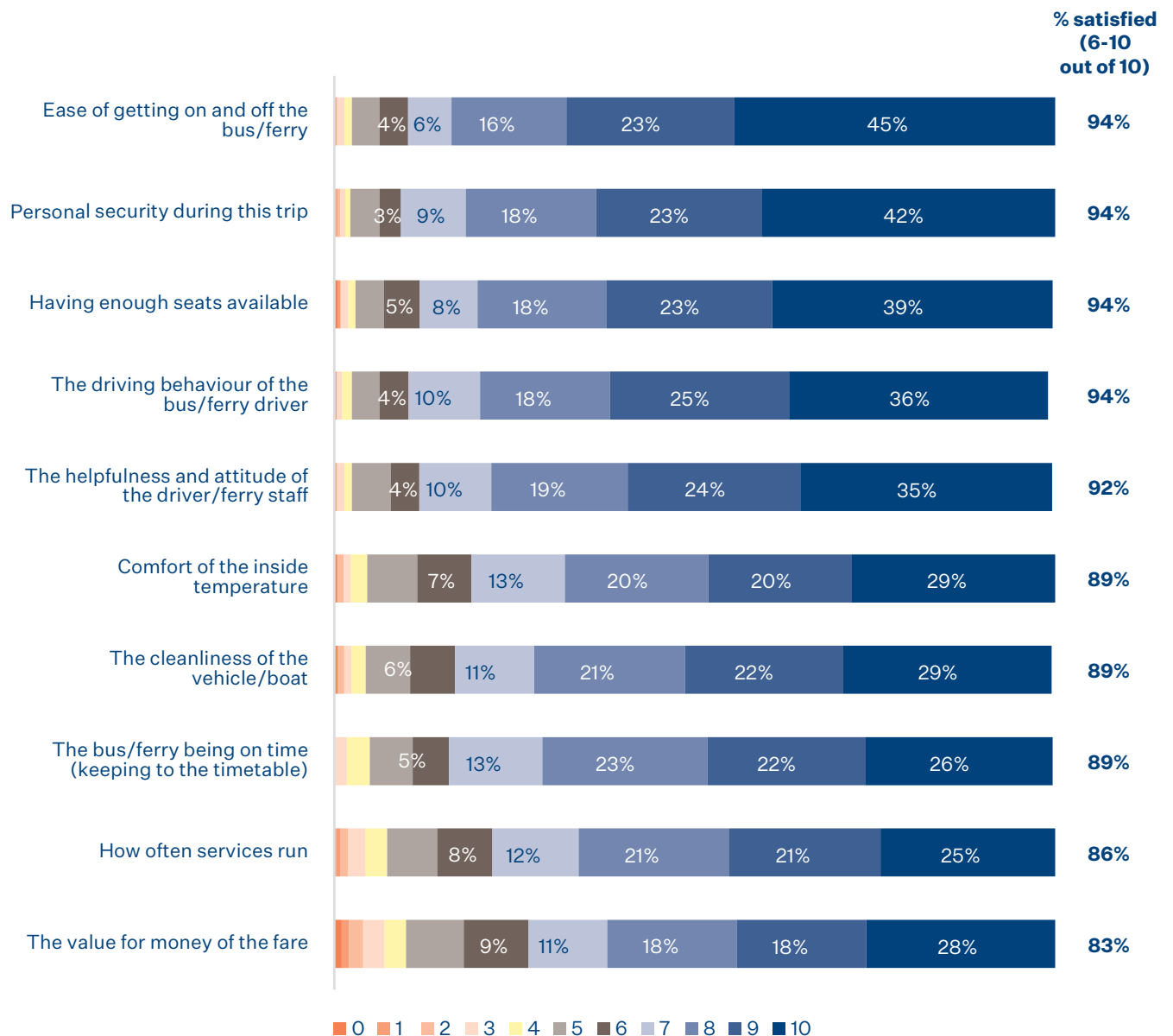
**Figure 10: Trip Satisfaction by User Groups, Scores of 9 or 10**





There continues to be high overall levels of satisfaction (rating of 6+) across all the key areas.

**Figure 11: Satisfaction with Service Areas, Scores 6 to 10**



When looking at the most positive service ratings (9 or 10 out of 10), ease of getting on/off the vehicle and personal security continue to be the areas that provide the greatest satisfaction.

There has been some improvement for timetabling and timeliness, increasing 4% and 5% respectively, however they remain as improvement areas with lower satisfaction levels. Value for money is also a priority area, showing negligible change in satisfaction.

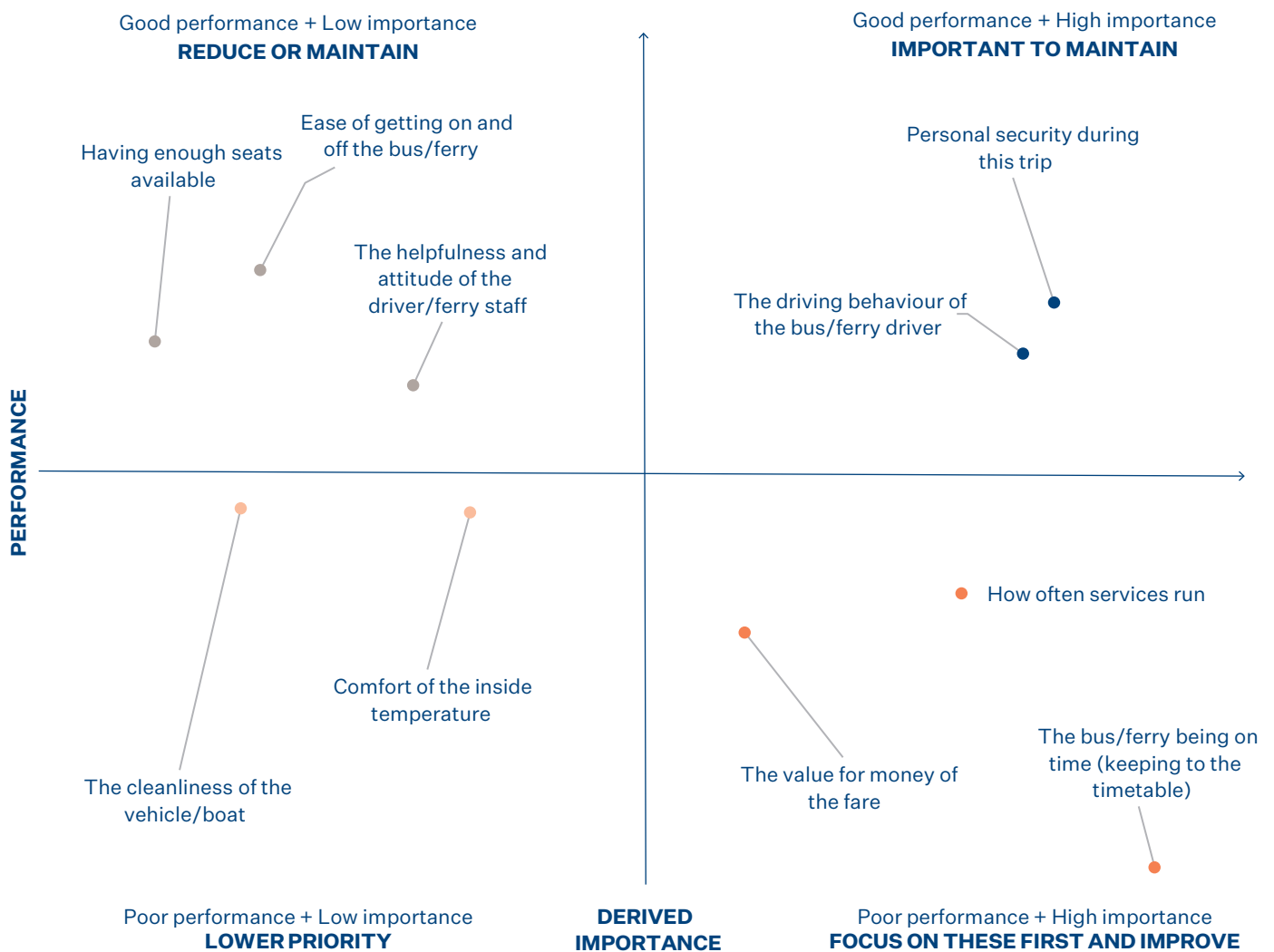
**Table 2: Satisfaction with Service Areas, Scores 9 or 10**

	<b>% satisfied (9-10 out of 10)</b>	<b>Change since 2019</b>
Ease of getting on and off the bus/ferry	68%	+1%
Personal safety during this trip	64%	0%
Having enough seats available	62%	+8%
The driving behaviour of the bus/ferry driver	61%	+7%
The helpfulness and attitude of the driver/ferry staff	59%	+6%
The cleanliness of the vehicle/boat	50%	+3%
Comfort of the inside temperature	49%	+2%
The bus/ferry being on time	47%	+5%
The value for money of the fare	46%	+1%
How often services run	45%	+4%

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

- This analysis shows that the critical areas to improve (in the bottom right quadrant) are timeliness, value for money of the fare and how often the bus service runs
- The top right quadrant shows that personal security and driver behaviour is important at driving overall satisfaction, and is currently delivered well, so it will be important to maintain this area of service.
- Service areas on the left-hand side are relatively less important in influencing overall satisfaction levels.

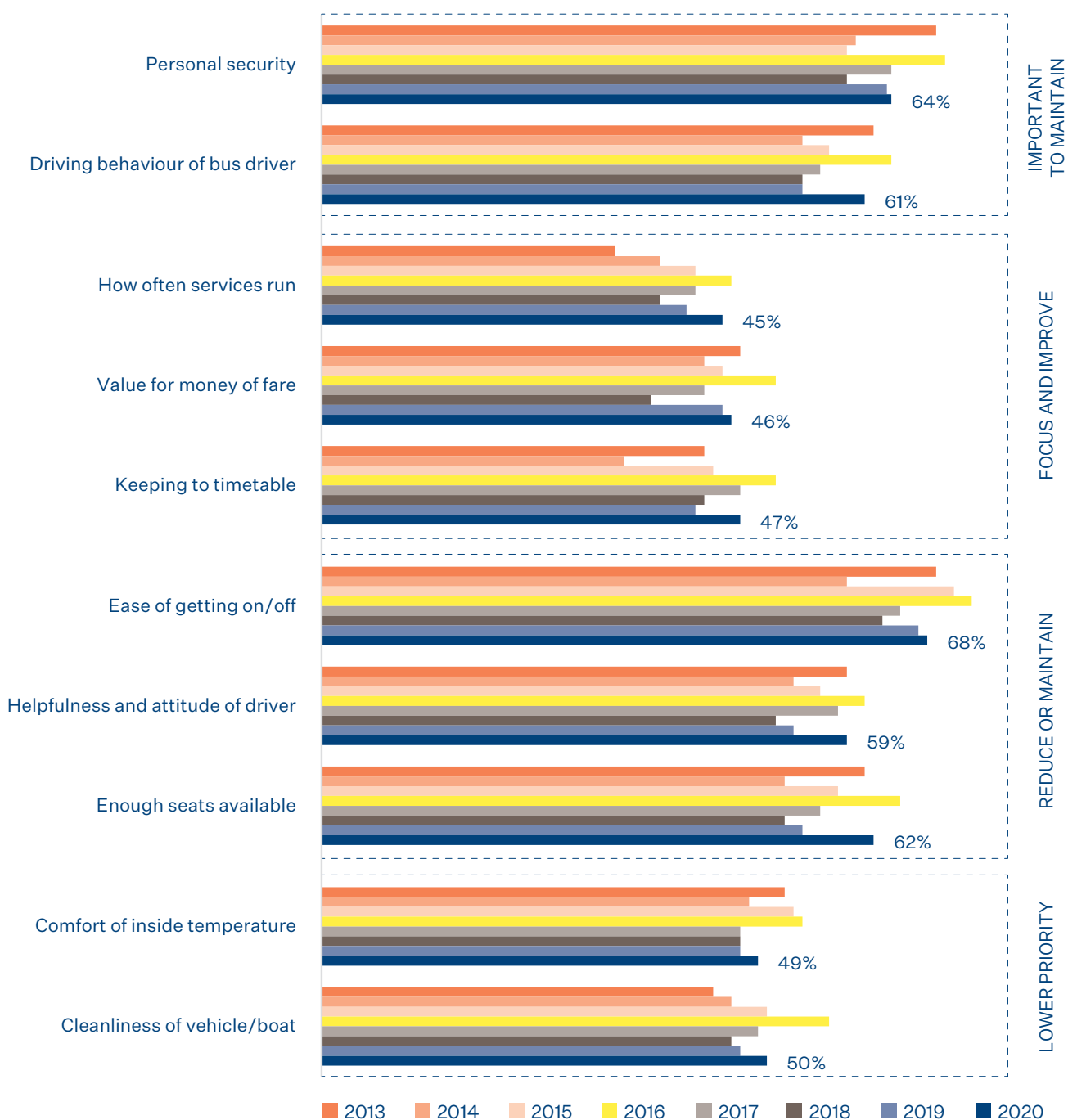
**Figure 12 Derived Importance Matrix - Christchurch 2020**



While service frequency, value for money and timeliness have improved over the past year, they continue to be the weakest performing areas. These should be the areas for ECan and the bus operators to focus on as there is clear opportunity to improve these service areas further

All service areas have all seen improvements since 2019. The exception is driving behaviour, which has drastically increased compared to 2019 and 2018.

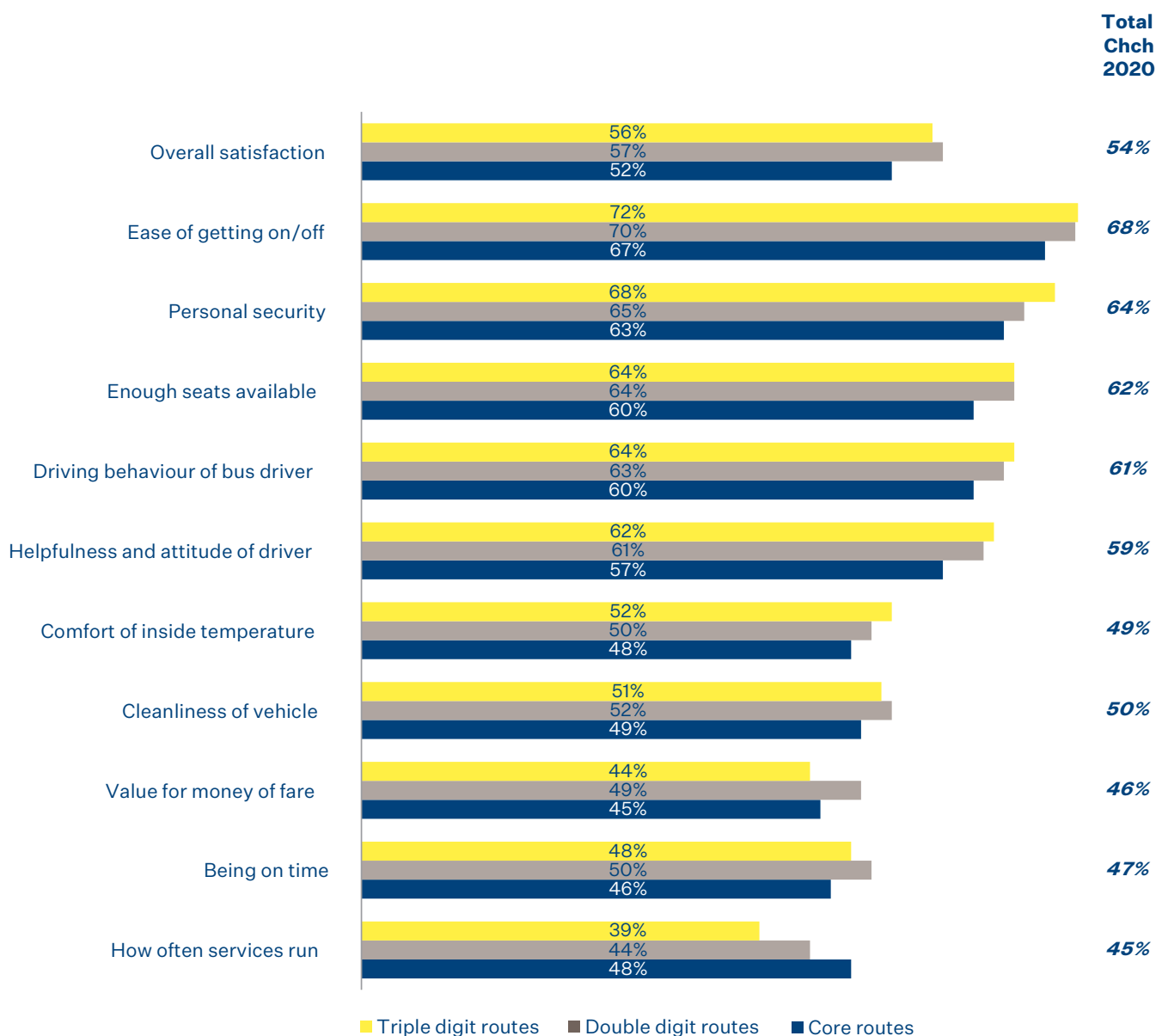
**Figure 13: Performance of Service Areas, Over Time, Scores 9 or 10**



Overall bus route performance is similar when grouping key routes together:

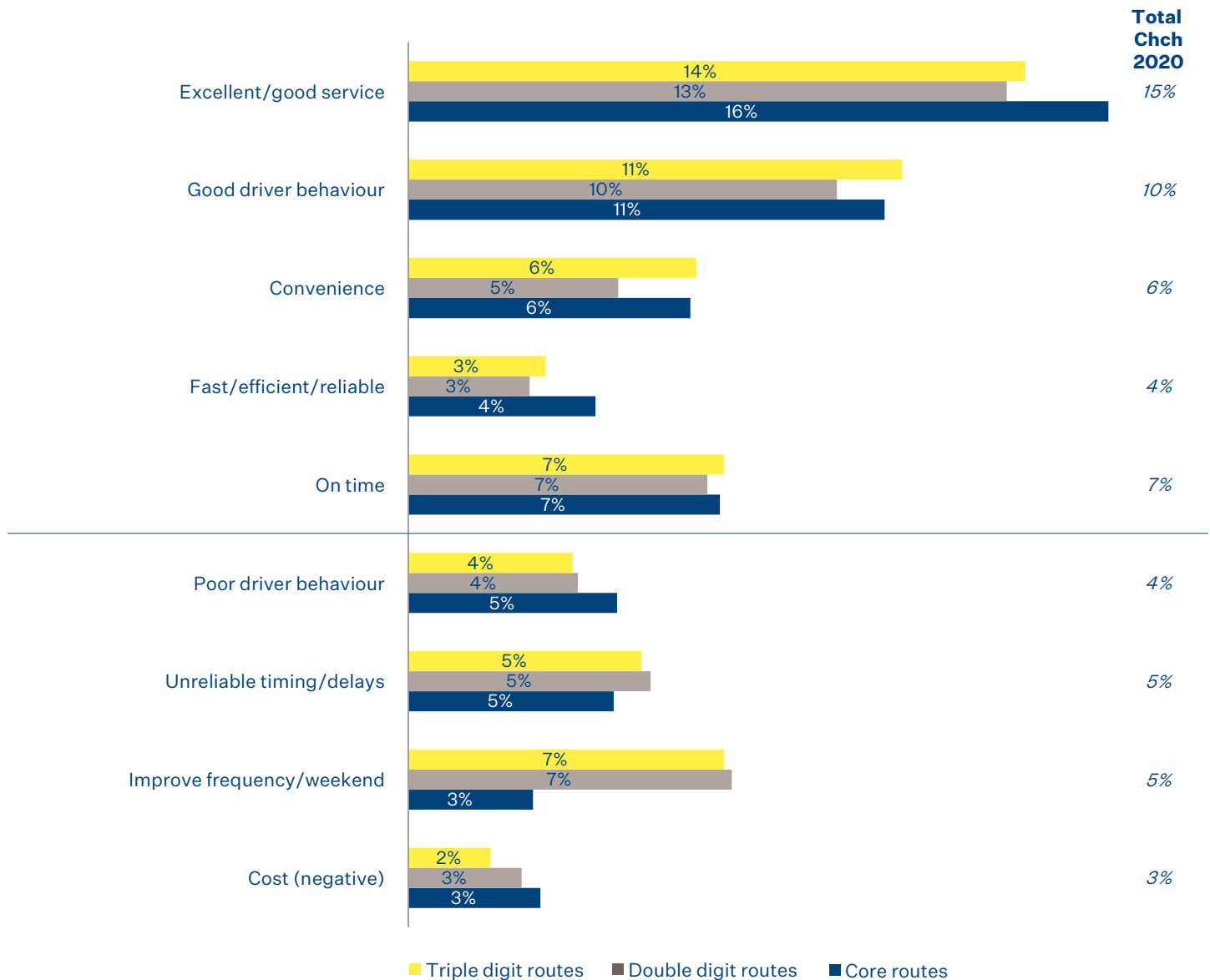
- The Core routes, or coloured lines and the Orbiter, score consistently lower on most service areas compared to other routes. The exception to this is service frequency, which we know to be a key driver of overall satisfaction so it is important to improve this area.
- The double and triple digit numbered routes perform very similarly this year.

**Figure 14: Bus Route Satisfaction by Key Routes, Scores 9 or 10**



Reasons for satisfaction are broadly similar, although the double-digit routes encounter fewer positive comments about driver behaviour and convenience.

**Figure 15: Reasons for Bus Route Satisfaction, by Key Routes, Scores 9 or 10**



## Satisfaction with Public Transport

5



## 5.1 Summary

Satisfaction with public transport overall also remains high this year among existing users.

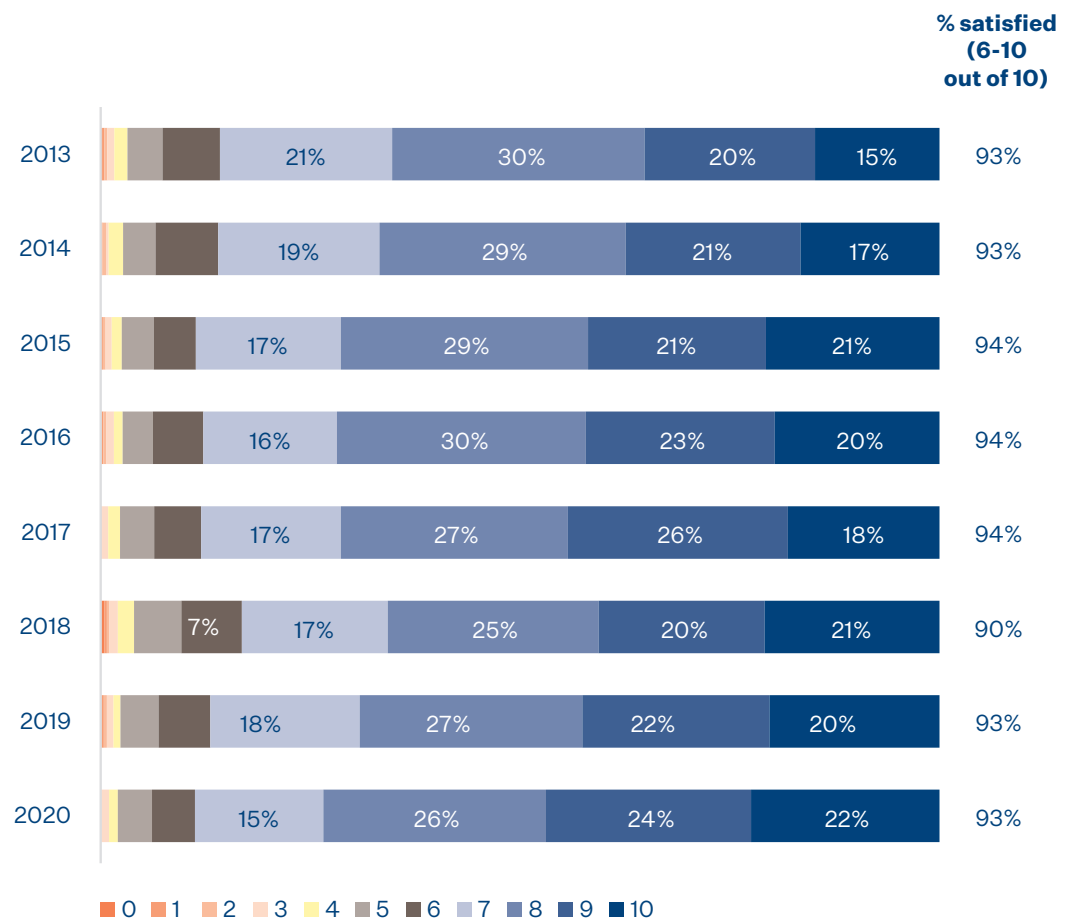
- 
- |          |  |
|----------|--|
| <b>1</b> | Satisfaction is especially high among <b>SuperGold and 65+ users</b> . |
|----------|--|
- 
- |          |  |
|----------|--|
| <b>2</b> | <b>Convenience of payment</b> and the <b>ease of getting information</b> receive the <b>highest levels of satisfaction</b> . |
|----------|--|
- 
- |          |  |
|----------|--|
| <b>3</b> | Quality and availabilty of <b>bus shelters</b> , as well as <b>information about delays</b> , continue to receive the <b>lowest satisfaction ratings</b> . |
|----------|--|
- 
- |          |   |
|----------|---|
| <b>4</b> | Satisfaction is <b>consistent</b> with the levels reported in <b>2019</b> . |
|----------|---|
- 
- |          |  |
|----------|--|
| <b>5</b> | <b>Likelihood to recommend public transport is strong</b> , with almost 90% likely or very likely to recommend. This is consistent with the 2019 findings, and is the <b>highest recommendation level reported to date</b> . |
|----------|--|
-



## Overall Satisfaction with Public Transport

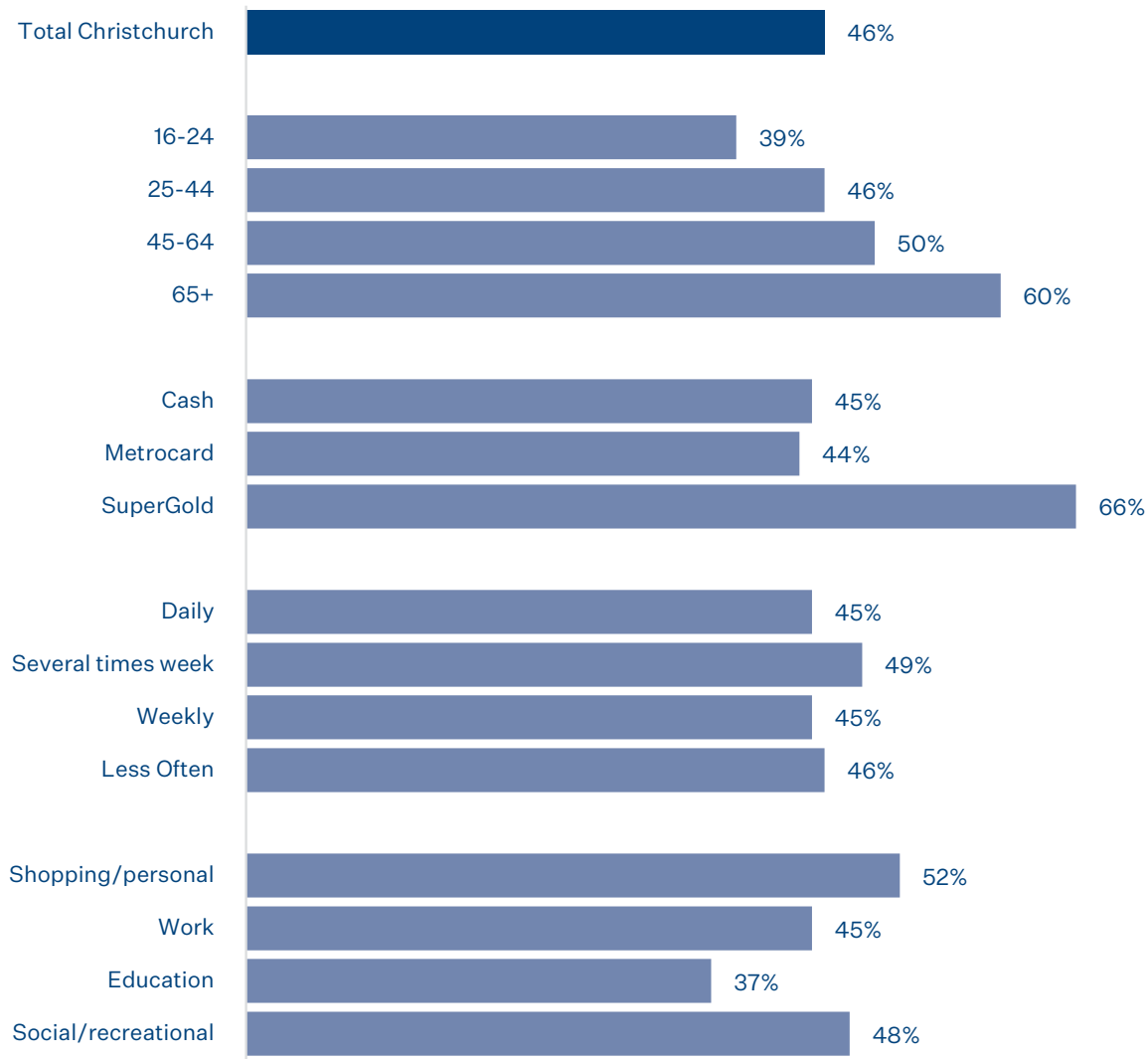
Overall satisfaction with public transport remains very high and comparable to previous years.

**Figure 16: Overall Satisfaction with Public Transport, Scores 6 to 10**



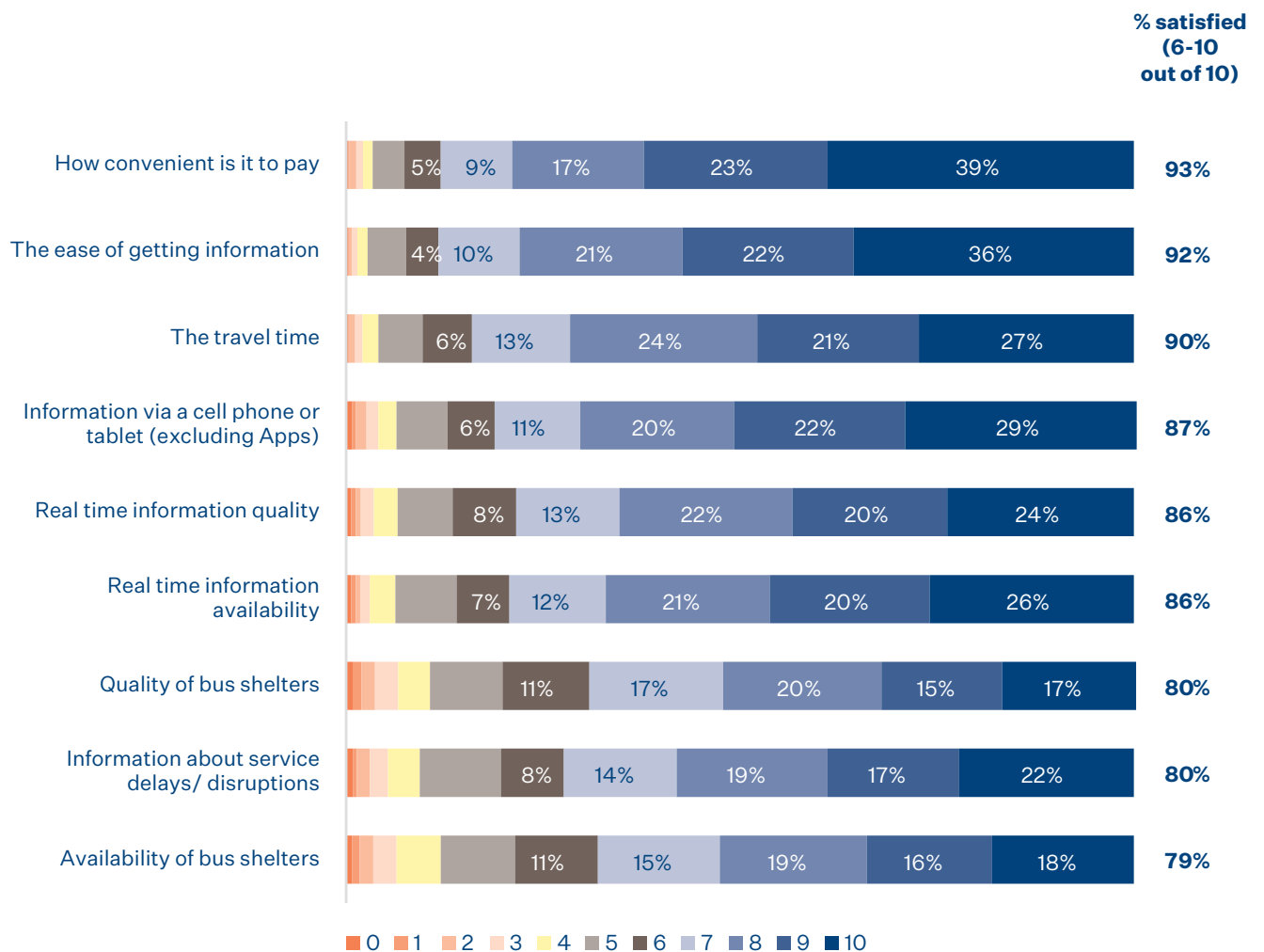
Satisfaction with public transport continues to be higher among those who are older (65+) with a SuperGold card (free off-peak travel).

Figure 17: Public Transport Satisfaction by User Groups, Scores 9 or 10



Public transport users are most 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 18: Satisfaction with Public Transport Areas, Scores 6 to 10**



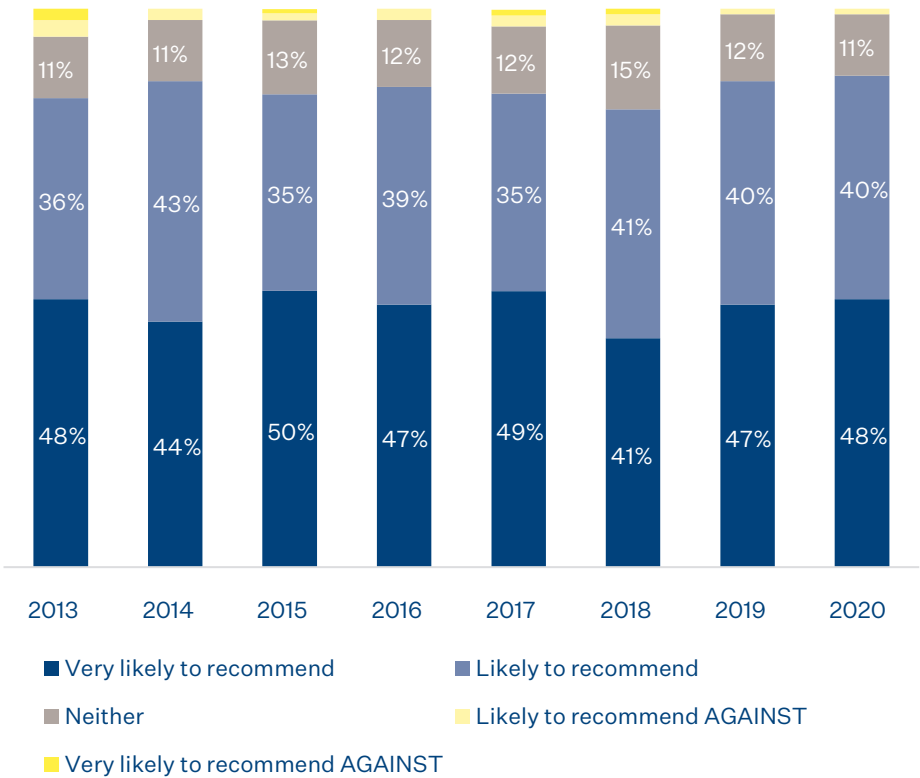
The satisfaction with public transport is stable with 2019. There are some small increases in satisfaction with bus shelters, however satisfaction remains low.

**Table 3: Satisfaction with Public Transport Areas, Scores 9 or 10**

	<b>% satisfied (9-10 out of 10)</b>	<b>Change since 2019</b>
How convenient is it to pay for public transport	62%	0
The ease of getting information about public transport routes and timetables	57%	0
Information via a cell phone or tablet (excluding Apps)	51%	-3%
The travel time (considering the distance you travel)	48%	+3%
Real time information availability	46%	-2%
Real time information quality	43%	-2%
Information about service delays/disruptions (if applicable)	39%	+3%
Availability of bus shelters	34%	+4%
Quality of bus shelters	33%	+2%

Likelihood to recommend public transport is high. Following the trend of the last two years, it has increased slightly and is now the highest level of recommendation to date.

Figure 19: 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 'more' from the public transport network.

### Figure 20: Suggested Improvements



Key themes have been broken down to match the key driver analysis. The most common suggestions were making the fare more competitive or increasing the service frequency and timeliness. Improvements in these areas will drive satisfaction up and are important areas to consider.

**Table 4: Suggested Improvements**

		
FOCUS ON FIRST AND IMPROVE:	LOWER PRIORITY	OTHER THEMES (ON BUSES)
<ul style="list-style-type: none"> <li>• Value for money</li> <li>• How often services run</li> <li>• The bus/ferry being on time</li> </ul>	<ul style="list-style-type: none"> <li>• Bus cleanliness</li> <li>• Availability of information</li> <li>• Driver behaviour</li> <li>• Bus shelter availability and quality</li> </ul>	<ul style="list-style-type: none"> <li>• Music/WI-FI/air conditioning</li> </ul>
<p>“More frequent at peak times. Better fare packages e.g. monthly pass. Better routes along Blenheim Road.”</p> <p>“More buses, more often at peak times. Stay on time.”</p>	<p>“You need an app that shows how far away the bus is in minutes (real time).”</p> <p>“Clean the buses, especially the upholstery. I have seen clouds of dust come out when children bang on the seats.”</p> <p>“Consistency of drivers abilities and attitudes.”</p> <p>“More bus shelters would be nice. Especially with lights as I often travel at night and busses can fail to see me.”</p>	<p>“Maybe music or free WI-FI.”</p> <p>“Air-conditioned buses in the summer - this is a long bus ride.”</p>

## Information and Infrastructure







## 6.1 Summary

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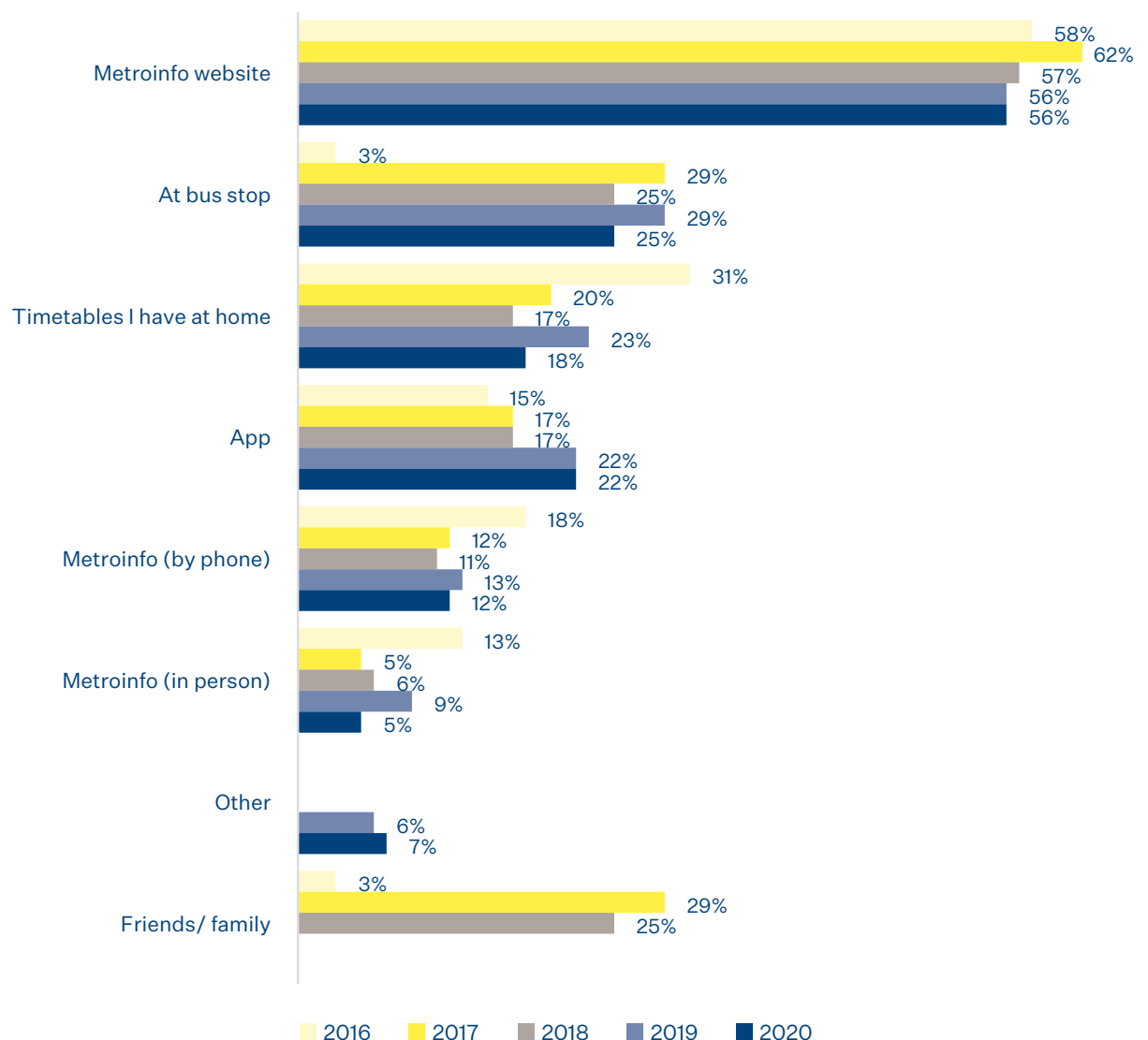
- 1** The **Metroinfo website** is the main source of service information for Christchurch passengers.
  - 2** Over **80%** get to their bus stop by **walking**. Typically this takes just over **7 minutes**.
  - 3** **Metrocard** remains the most **dominant form of bus payment**, as cash use continues to decline to around 1 in 10 passengers.
  - 4** Those who use **cash to top up their Metrocard** find it **more convenient**.
  - 5** **6 in 10** current passengers **do have a drivers license**, many of whom would have added another vehicle to the roads if public transport was not available, so the **current system is converting some car users to the bus network**.
-

## 6.2 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 is stable with 2019, with 1 in 5 users relying on this for timetabling. This trend is gradually increasing over time, indicating a trend that Christchurch residents are gradually becoming more digital with their behaviour.

**Figure 21: Information Sources**

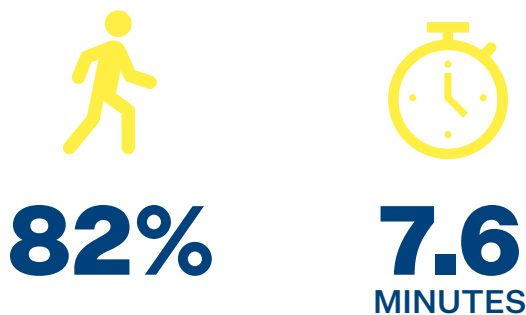


### 6.3 Getting to the Bus Stop

Almost all bus users walk to the bus stop, taking an average of just over 7 minutes.

1 in 10 transfer via another bus and 4% drive or are driven by someone else.

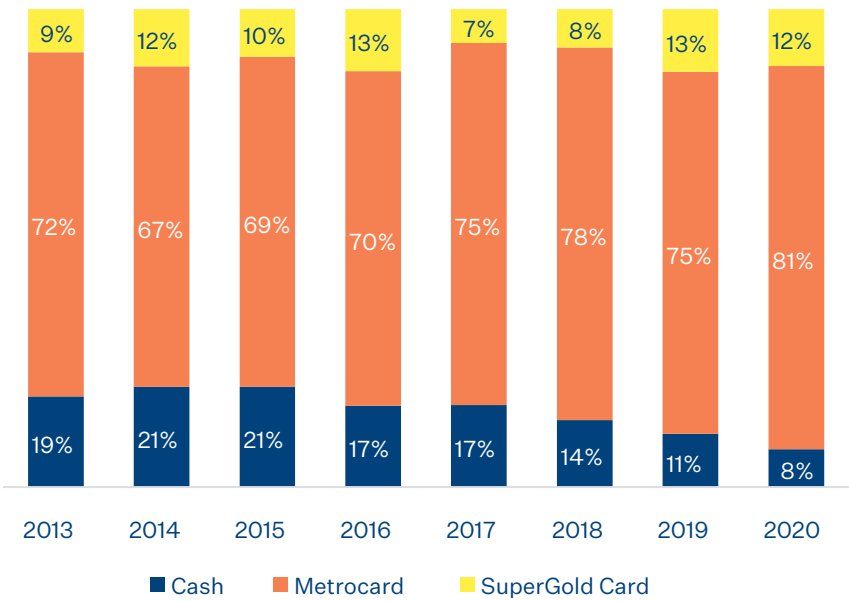
Figure 22: Travel to the Bus Stop



### 6.4 Payment

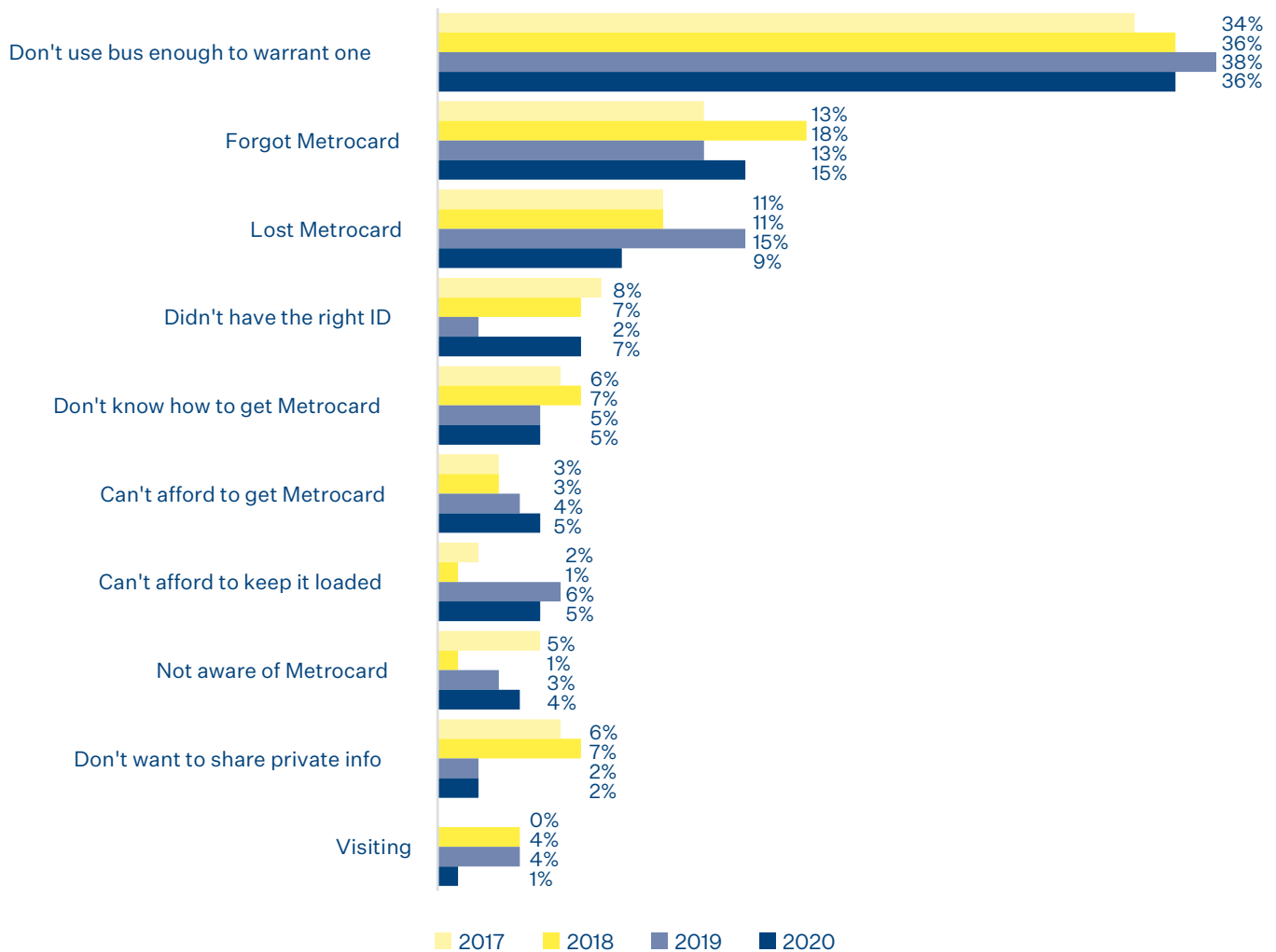
With Metrocard remaining the most dominant form of payment, we continue to see the decline in the use of cash.

Figure 23: Payment Type



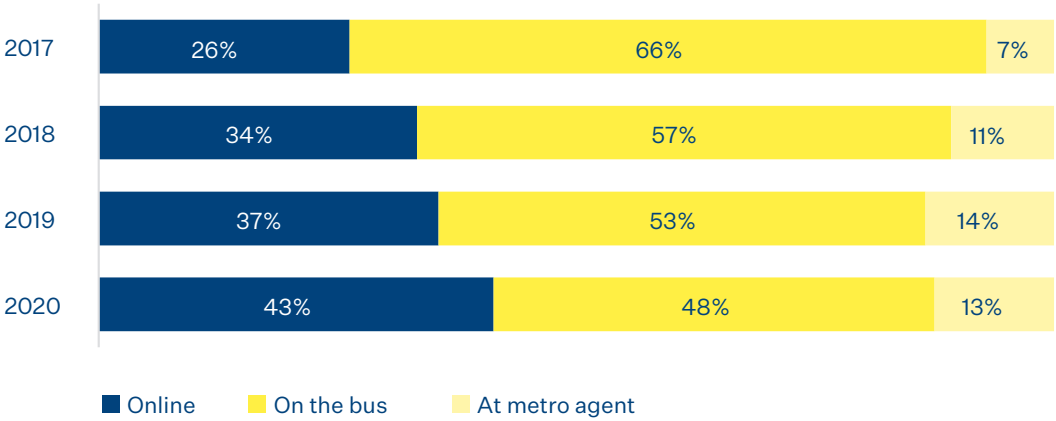
The most common reason for paying cash is infrequent use of the bus service. Others had forgotten or lost their Metrocard.

**Figure 24: Reasons for Paying Cash (Those Who Paid by Cash)**



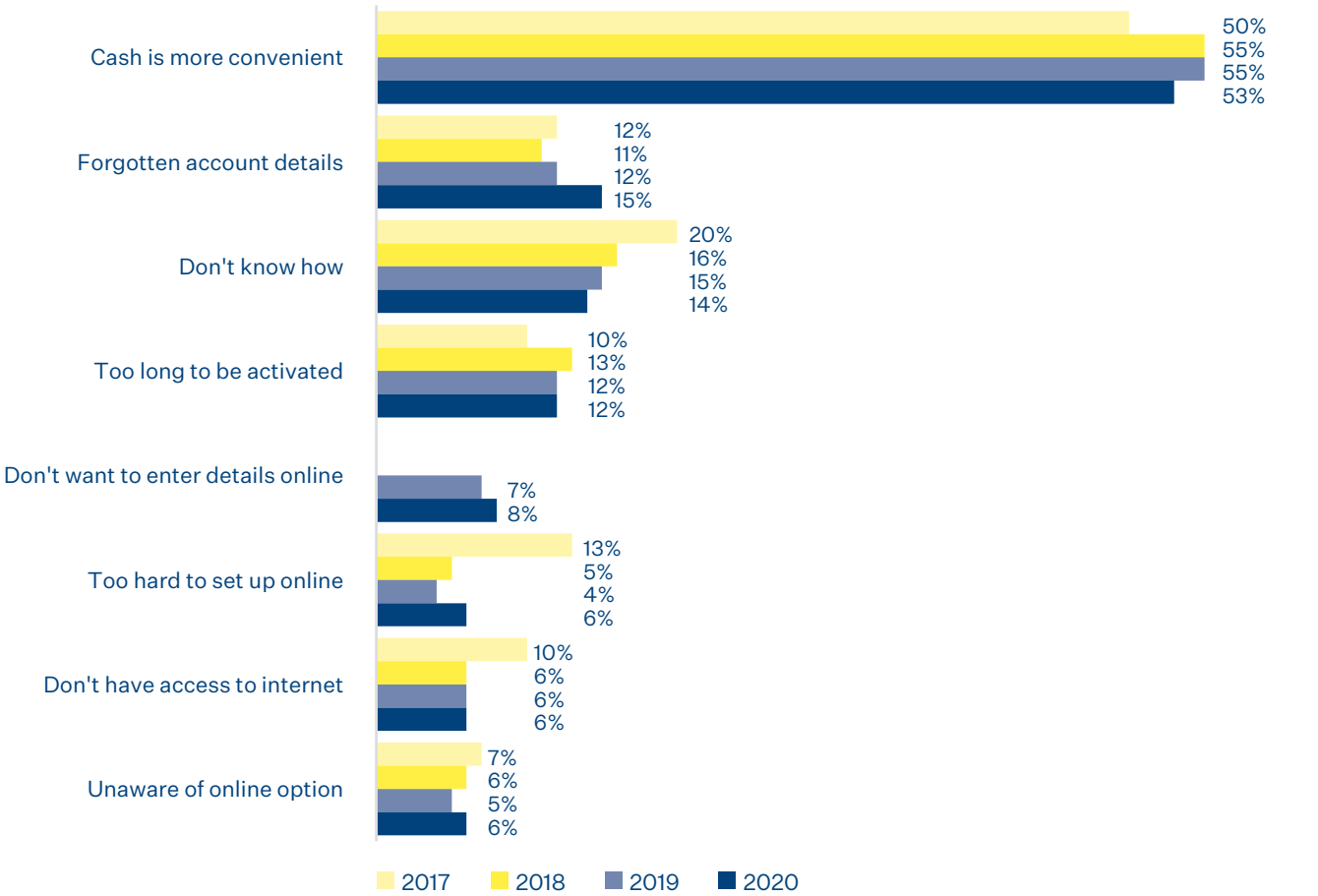
While the majority still top up their Metrocards on the bus, we are seeing an increase in those topping up online.

Figure 25: Form of Metrocard Top Up (Those Who Paid by Metrocard)



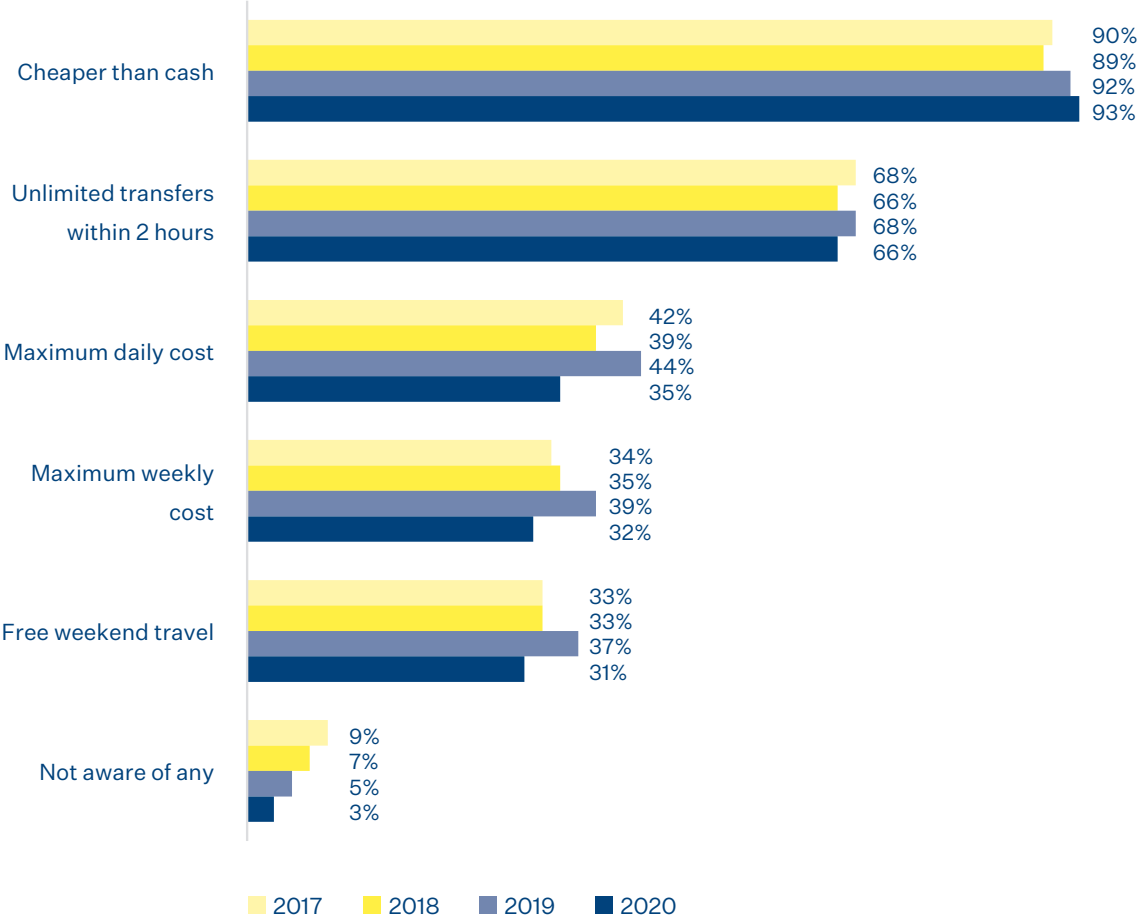
Those who top up by cash find it more convenient.

Figure 26: Reasons for Not Topping Up Online (Those Who Paid by Metrocard)



Awareness of Metrocard benefits is stable with previous years.

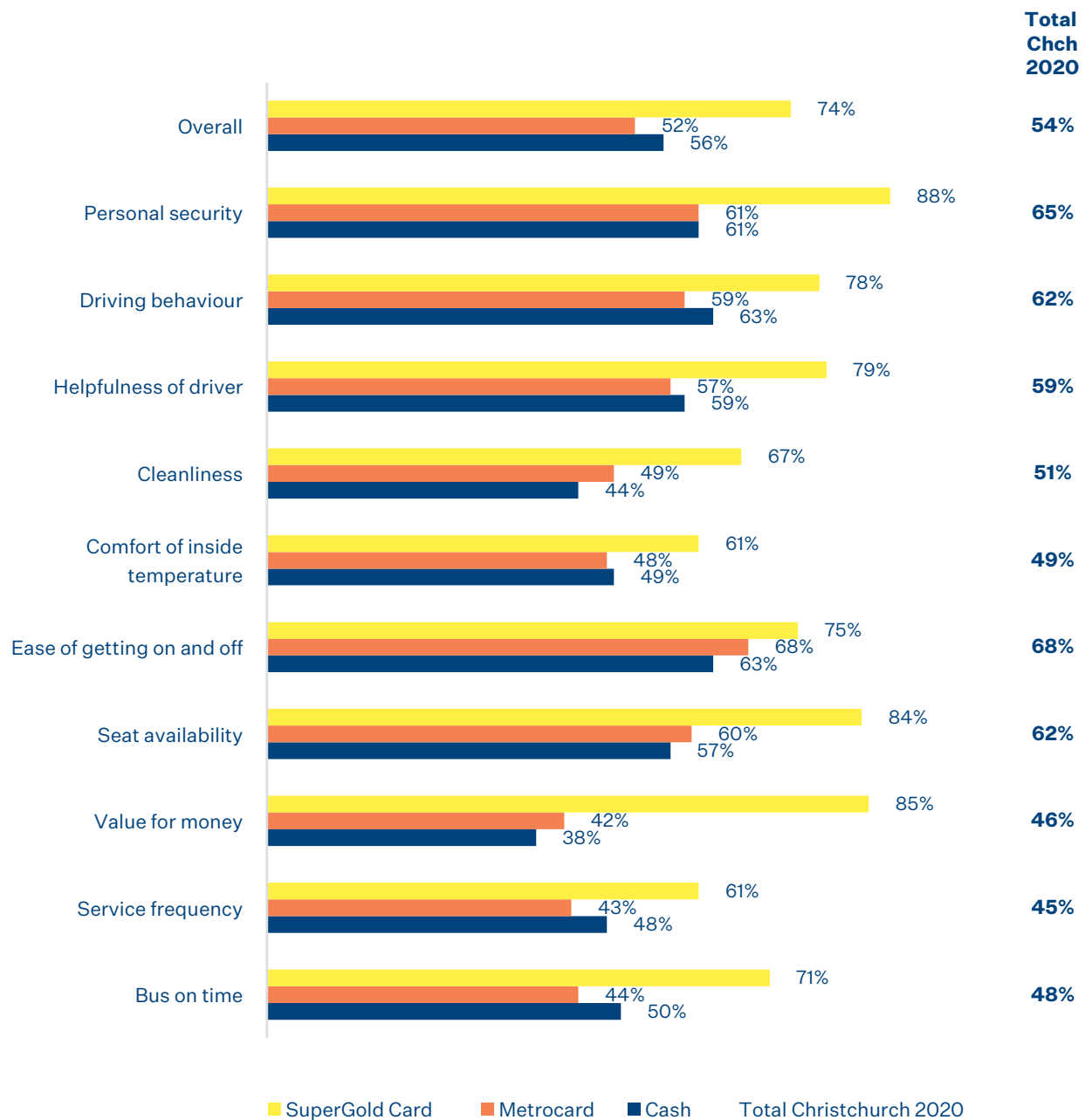
Figure 27: Awareness of Metrocard Benefits



## 6.5 Satisfaction by Payment Type

SuperGold card holders are the most satisfied across all service areas.

**Figure 28: Bus Satisfaction by Payment Type, Scores 9 or 10**

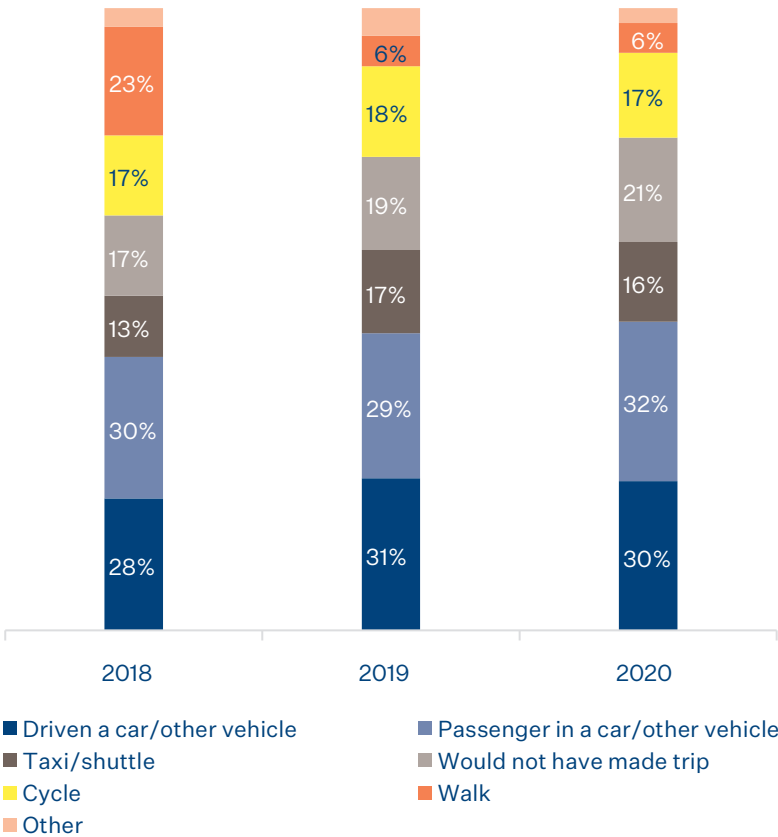




### 6.6 Alternate Transportation

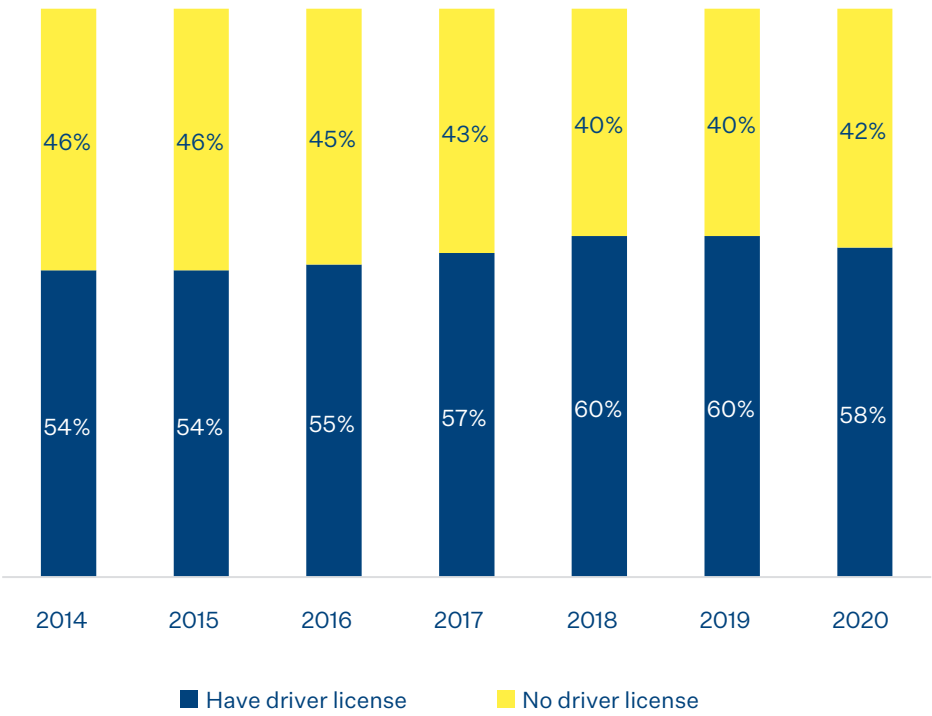
Almost seven in ten public transport users would have driven a car or been a passenger in a car if public transport was not available, adding to the number of cars on the road. One in five would not have made the trip, which was higher amongst those aged 65+.

Figure 29: Alternate Transport Modes



The number of public transport users that hold a drivers' licence is stable at approximately 60%.

Figure 30: Public Transport Users with Drivers' Licence



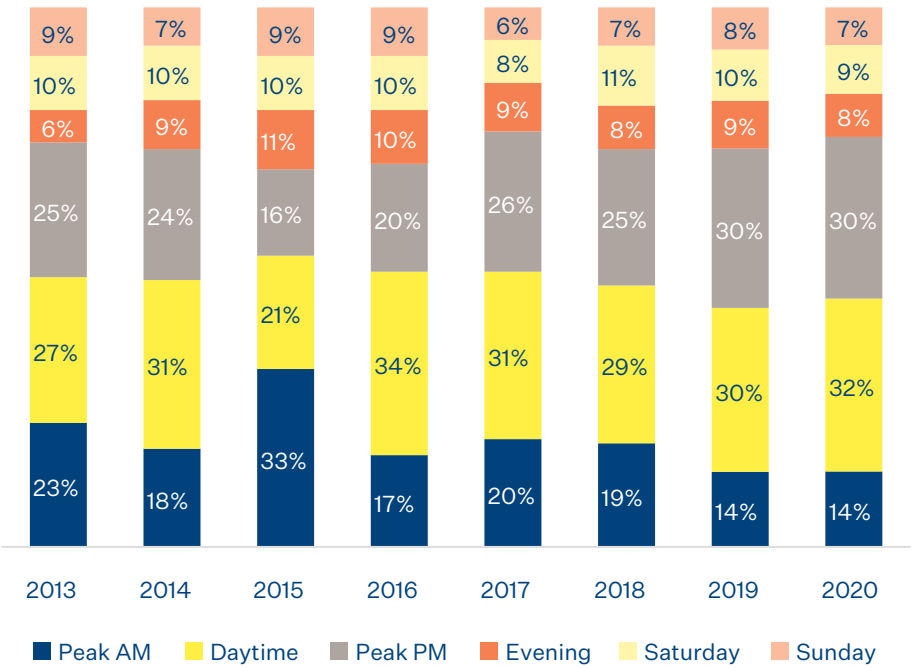
# Appendix One



Time of travel reflects the quotas used based on 2019 adult patronage levels.

In 2019 and 2020 this is solely based on adult patronage to reflect interviewing of adults (aged 16+). In previous years, this has included child patronage numbers.

Figure 31: Time of Travel





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