

Independent Pricing and Regulatory Tribunal of NSW

## **Survey of rural and regional buses and on-demand transport services**

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# Contents

<b>1. Executive Summary</b> .....	<b>1</b>
<b>2. Introduction</b> .....	<b>4</b>
A. Background .....	4
B. Research objectives .....	5
C. Methodology .....	5
<b>3. Main Survey Findings</b> .....	<b>8</b>
A. Current transport usage in regional area .....	8
B. Satisfaction with current transport services .....	13
C. On-demand transport services .....	27

## Appendices

Appendix A: Questionnaire

*This research was conducted in accordance with our ISO20252 accreditation.*

# 1. Executive Summary

## *Usage of transport services*

**Use of buses appears to be relatively uncommon in regional areas of NSW.** Overall 6% of all respondents in the main survey had used a bus within the last 6 months, a figure which varied from 3% to 10% across the six regions.

The results from the four supplementary sample groups (which were anticipated to make greater use of public transport) were not vastly different from the main survey. 12% of those people interviewed who identified as having a disability had used buses. Buses were also a little more used by younger people, by those who lived in a major regional centre or within 5km of the middle of a regional centre, and by people who do not have regular employment.

By comparison, 16% of people reported using taxis, and 7% using some form of Courtesy Transport. Only 2% of people reported using Community Transport.

15% of respondents said that at some stage in the last six months they had *considered using or tried to use a bus, but not done so*. 4% of people in this category said their last trip did not happen at all when this occurred. This was a little higher at 9-10% amongst the supplementary sample groups (females, aged 40+, on Centrelink benefits, or with a disability). Most people drove instead (77%).

## *Satisfaction with Transport Services*

**Satisfaction with the bus service in local regions was moderate.** Overall, 39% of respondents in the main sample described themselves as 'satisfied' with the service that was available, while 25% said they were 'dissatisfied'. These overall levels of satisfaction didn't vary greatly by region, or across the four supplementary sample groups.

Satisfaction *does* vary though based on where people live. The proportion who say they are 'satisfied' with the local region bus service stays fairly constant, but the proportion who say they are actively 'dissatisfied' increases amongst people who live in small towns or in rural and remote areas compared to those who live in a major regional centre. Dissatisfaction also increases with distance from the centre of the nearest regional centre, regardless of what type of location people live in.

A similar pattern occurs for dissatisfaction with courtesy transport and taxis, but for both of those 'satisfaction' also declines with distance. There is some suggestion that those who live at an intermediate distance (10-20km, 20-50km) might be the least satisfied with the transport services available to them.

## *Aspects of Bus Services*

The most problematic aspects of bus services in respondent perceptions and expectations were *availability, the quality of the bus stops, and the distance to the nearest stop from where they live*.

This broad pattern was evident in most sup-groups of respondents, including the supplementary samples. There appeared to be some particular sensitivities - those who lived in rural and remote locations or 50+km from the centre of a major town were more dissatisfied with the distance to a stop; those who live closer in were more sensitive to the quality of the stop itself; and those aged 35-54 were sensitive to availability and the quality of the stop.

### *On Demand Bus Services*

**There was moderately strong interest in concept of an on demand style of bus service, though relatively limited apparent willingness to pay much more to use such a service.** 58% of all respondents indicated some interest in using an on demand style of bus service<sup>^</sup>, which was **highest amongst younger people, amongst those who currently use courtesy transport, and amongst those with a disability.**

Importantly, both **the aspects of the current bus service identified as amongst the more problematic** (quality of the stops, availability, and distance to the nearest stop) **and the most appealing possible improvements to bus services** (allowing personal destinations and being able to book a bus for the right time) **were highly congruent with the concept of an on demand bus service.**

All of the possible improvements to bus services were more appealing to people who live in small towns, ahead of those in rural and remote locations, and both ahead of those in major regional centres. People with a disability and those who currently use courtesy transport are also more positive about all the possible changes.

While there is some interest in the on demand concept, respondents only indicate a limited willingness to pay much extra for an on demand service compared to an existing traditional bus service. Most might be considered willing to pay an extra \$2, but this dropped to around half being willing to pay an extra \$5 and very few willing to pay an extra \$10. Those who are most interested in the concept *are* more willing to pay an extra \$5 or even an extra \$10.

<sup>^</sup> This should not be interpreted as an estimate of likely take-up, but rather as an indication that there is a substantial proportion of these regional communities for whom this concept has some appeal.

### *Channels*

While there is strong interest from younger people in being able to book an on demand service or get information about buses through digital channels including from an app, this was not the case with older respondents and with the four supplementary sample groups. For these groups, the phone was by far the preferred channel for bookings, while hard copy was also appealing as a reference source for information.

### *Patterns*

While samples at the level of the individual regions were small, it appeared that overall the pattern across regions was more similar than dissimilar.

Similarly, the four supplementary samples (females, those aged 40+, those on Centrelink benefits, or those with a disability) did not vary dramatically from the wider regional respondent sample. Of the four, the disability group was probably the most consistently of interest with respect to bus services.

Age was a definite factor, with younger rather than older people seemingly more engaged with the current bus service and more interested in the on demand concept. This appeared to be interacting with their current use of courtesy transport (and some may see on demand buses as an alternative).

Where people live is also an important factor in respect to their use of and opinions about transport. Those people who live in small towns have the highest interest in an on demand bus service; while those who live at an intermediate distance 10-50km from a regional centre appear to be the least satisfied with some of their current transport options.

### *Conclusions*

Overall, satisfaction with and use of bus services in regional areas appears only low-to-moderate. There is considerable possible interest in an on demand style of bus service for regional areas.

It appears there is substantial similarity across regions, suggesting that broad strategies may be mostly appropriate rather than needing individual approaches to each region. There is a need to consider the preferences and requirements of certain groups of current and potential regional bus users, in particular the needs of users with a disability and the rather different preferences of younger people.

## 2. Introduction

### A. Background

The Independent Pricing and Regulatory Tribunal (IPART) of NSW sets the maximum fares that rural and regional bus operators can charge for regular transport services outside greater metropolitan areas. In 2012, IPART established a 5-year fare determination for rural and regional bus services. The determination set out the maximum full fare from January 2013 with annual changes based on the change in cost of service provision for each year thereafter. The scope of this determination covered rural and regional bus users paying the maximum fares and travelling up to 220 sections (with each section being approximately 1.6 km). Pensioner or student concession discount fares and the price/availability of Regional Excursion Daily tickets fell outside the scope of this determination.

IPART is now undertaking a review to determine the maximum fares from 1 January 2018 and to provide advice to the NSW Government on the development of 'on-demand' transport services in regional NSW. On-demand services are user-centred services provided when and where a customer requests them rather than via the more traditional, fixed routes and time-table approach. This on-demand, customer needs based approach is an emerging trend within the transport sector.

Unlike previous reviews which have focused on cost in service provision, IPART plans to ensure that this current review results in fares that:

- Promote the efficient delivery and use of public transport
- Maximise benefits for customers
- Are logical, predictable and stable over time, and
- Consider the impacts on fare revenue and on bus operators.

This review will also consider additional matters specified in the Minister's referral:

- The equity of rural and regional bus fares compared to Sydney bus fares
- The benefits and costs of simplifying the current fare structure, and
- Customers' willingness to pay, given demographics and current service quality in regional NSW.

In rural and regional NSW, private bus operators provide public bus services under contracts with the State government. In 2016, Transport for NSW (TfNSW) introduced a new contract system based on rural and regional NSW being broken down into distinct geographic regions. To date, fares have been set on a distance-based structure with the price increasing with increased journey length. This review will consider whether this approach is appropriate and the costs and benefits of simplifying it. The review will particularly consider what the maximum number of sections should be (as many bus operators are known to have a simpler, lower number of sections than in the TfNSW fare structure). Furthermore, the review will consider whether a daily or weekly cap should apply to rural and regional bus services and what would be the best way to implement this.

The survey reported here was conducted in support of this review, and was conducted with residents of six regional areas within NSW.

## B. Research objectives

The aim is for the research to explore current usage of transport services, potential demand for flexible transport services and demographic information to aid profiling of potential user groups.

This research project has two key objectives:

1. To understand current demand for transport services in several key rural and regional areas of NSW (particularly regular bus services, community transport and taxis)
  - To compare modes and characteristics of transport services, identifying how these differ between regions, and between cities within regions; and
2. To assess the potential for greater use of more flexible, on-demand services.

The research investigated these issues amongst the general adult community and also specifically explored the views of four key community segments (who have previously been identified as more likely than the broader community to use regular bus services, community transport, taxis and/or more flexible transport services):

- Females
- Respondents aged 40 and above
- Customers on Centrelink benefits; and
- Disabled customers.

## C. Methodology

The survey was conducted using Computer Assisted Telephone Interviewing (CATI) between 10<sup>th</sup> and 21<sup>st</sup> July 2017.

5% of interviews were conducted in an initial pilot, after which a small number of minor changes were made to the questionnaire. As these were mostly superficial, these pilot interviews were retained in the main sample data for analysis.

The survey was conducted in six geographic regions across NSW:

1. **Central West Region** Dubbo, Bathurst, Orange, Lithgow, Parkes, Mudgee, Cowra and surrounds
2. **Murray and Murrumbidgee Region** Albury, Wagga, Griffith and surrounds
3. **Northern Rivers Region** Tweed, Lismore, Ballina, Casino and surrounds
4. **Far West** Broken Hill, Cobar, Coonamble, Burke and surrounds
5. **New England Region** Tamworth, Armidale, Moree, Narrabri, Gunnedah and surrounds
6. **Mid North Coast** Coffs Harbour, Port Macquarie, Taree, Grafton and surrounds

60% of surveys were conducted by landline using randomly generated numbers anticipated to be within the regional areas (defined by LGA boundary). The remaining 40% of surveys were conducted

by mobile, using geographically targeted sample purchased from Australia's leading provider of research sample, Samplepages<sup>1</sup>. In each household we asked to speak to the youngest adult first, a strategy which helps overcome the natural bias in surveys to older respondents (especially in multi-generational households) and applies a randomisation to the within-household selection.

A total of n=607 surveys were completed in the main survey, n=100-102 per region. A sample of this size has a maximum estimated margin of error of  $\pm 4\%$  (at the 95% confidence level) for the overall sample, and of  $\pm 10\%$  for the regional samples.

The survey data was weighted at two levels for analysis:

- i. Within each region age and gender weights were applied to ensure the regional samples matched the demographic proportions of the populations (using ABS benchmarks).
- ii. At the overall sample level, an additional weight was applied for 'region' to ensure that each region's contribution to the overall result was equivalent of its relative population size.

Weighting survey samples in this way is standard and best-practice for analysis, as it ensures samples are demographically as representative as possible of the populations they will be projected onto.

An additional 'Supplementary Sample' was conducted with the four segments identified previously as being more likely to use public transport: Females; people aged 40 and above; those on Centrelink benefits; and those with a disability. 15 additional surveys with people in each of these categories were conducted in each of the six regions (ie: 60 additional surveys per region, or 90 additional surveys with each group). These surveys were not merged into the main sample, as they are statistically not easily combined. However, interviewees from the main survey who fit into each category *are* combined with the supplementary samples to boost those sub-group sizes for analysis. Where a person meets more than one supplementary sub-group criteria, they are included in each sub-group's results to maximise the sample available to look at each group.

The survey took an average of 13 minutes to complete. A total of 11,042 calls were made, with 3,825 resulting in a connection to a person. 25% of people contacted participated in the survey, and 54% declined (the balance screened out of the survey on various criteria). This ratio is fairly typical for a telephone survey.

The questionnaire for the survey was developed in collaboration between the researchers and IPART. It was designed to be no more than 15 minutes in average duration, and to be not much longer than 15 minutes in even its longest route. Given the diversity of respondents both anticipated and targeted in the supplementary sample, the survey was deliberately kept as simple and 'answerable' as possible. The pilot interviews indicated that respondents were adequately able to complete the survey.

A copy of the questionnaire can be seen in Appendix A.

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<sup>1</sup> Because sample cannot be perfectly targeted, some postcodes span multiple LGAs and some respondents do not have perfect ability to identify precisely where they reside with respect to the survey regional boundaries, it is possible that some respondents may have been included from just outside of the exact regional boundaries.





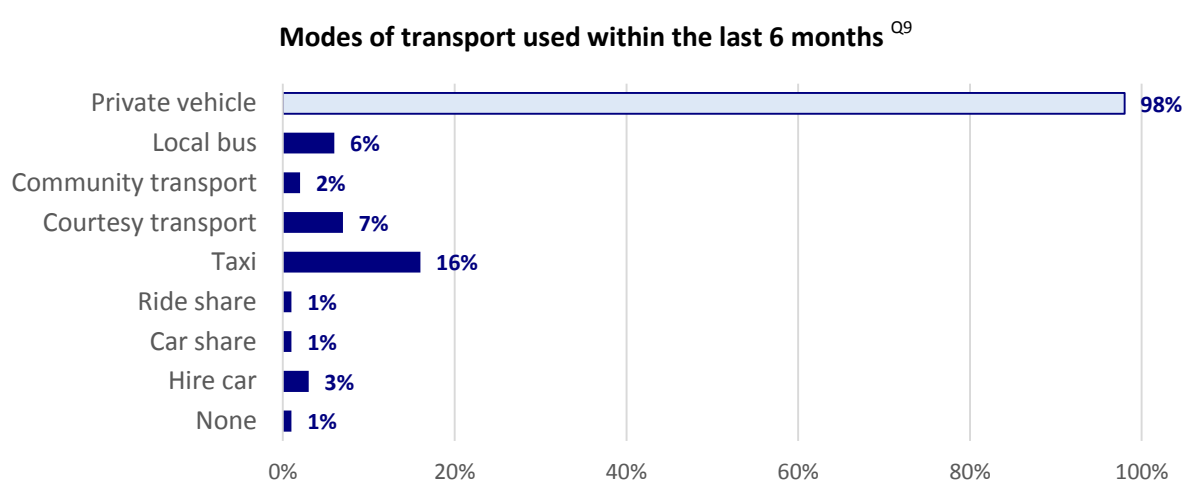
## 3. Main Survey Findings

### A. Current transport usage in regional area

#### Prevalence

Naturally, private vehicles are by far the most prevalent and nearly ubiquitous form of transport used.

Of other forms of transport used in regional areas, taxis (16%) were most commonly reported, ahead of courtesy transport (7%) and buses (6%).



	Used	Central West	Murray-Murrumbidgee	Northern Rivers	Far West	New England	Mid North Coast
Private vehicle	98%	96%	100%	96%	95%	100%	97%
Local bus	6%	3%^	7%	5%	6%	6%	10%^
Community transport	2%	2%	-^	3%	7%^	3%	2%
Courtesy transport	7%	6%	6%	7%	8%	6%	8%
Taxi	16%	20%	22%^	12%	21%	18%	11%^
Ride share	1%	-	3%	2%	-	1%	1%
Car share	1%	-	1%	2%	-	-	1%
Hire car	3%	2%	4%	6%	-	3%	1%
None	1%	1%	-	-	-	-	3%
Sample size	607	101	101	102	100	103	100

\* Statistically significant differences from overall average

^ Results are not significantly different from the overall mean, but there is a significant difference from highest to lowest reported levels

There were apparent differences in patterns across the six regions, however with the relatively small sample sizes involved at that level virtually none of these were statistically significant. Buses were reported most often in Mid-North Coast, and least often in Central West (while this pattern was largely reversed for taxis).

There were some trends observed within the overall aggregated data across all regions based on demographics. Relatively few variations were statistically significant, and where they were this was sometimes based on variations in sub-groups where the sample size is generally too small to report reliably.

The table below summarises 'plausible' trends observed in the data and where there are statistically significant differences from the highest-to-lowest reporting sub-groups, other than where indicated with an asterisk (\*) where the result is of interest but lacks statistical significance.

Mode	Variations
<b>Private vehicle</b> 98%	<ul style="list-style-type: none"> <li>• Nil</li> </ul>
<b>Local bus</b> 6%	<ul style="list-style-type: none"> <li>• Reported use of buses declined with age from 11% of 18-34s to 4-5% of those aged 55+</li> <li>• People who lived in a major regional centre (9%) and those who lived closer to the centre of a major regional centre (&lt;5km = 11%) tended to report the highest use of buses</li> <li>• Students, the unemployed and those on home duties were more likely to report using buses (small groups, but all 11%-29%)</li> </ul>
<b>Community transport</b> 2%	<ul style="list-style-type: none"> <li>• Increased with age and was highest in the 55+ age groups (3-4%)</li> <li>• Was highest amongst retirees (4%), and also used by students and the unemployed, reflecting eligibility for the service.</li> </ul>
<b>Courtesy transport</b> 7%	<ul style="list-style-type: none"> <li>• Had the reverse pattern to community transport, and declined with age from 9% of 18-34s to 4% of 65+*</li> <li>• Least often reported by those in rural or remote locations (2%)</li> <li>• Most often reported by respondent who were 'employed' (all 11%+) compared to all other employment status groups (&lt;5%)</li> <li>• Most often reported by those living less than 5km from the centre of a major regional centre (10%)*</li> </ul>
<b>Taxi</b> 16%	<ul style="list-style-type: none"> <li>• Taxi use declines with age from 26% of 18-34s to 10-12% of those aged 55+</li> <li>• Reported by 24% of respondents in a major regional centre, 16% in a smaller town, and 8% in a rural or remote location</li> <li>• Use is highest in those living close to the centre of their major regional centre - within 5km = 28% and within 5-10km = 21%</li> <li>• Those employed (all groups 20%+) were most likely to report using taxis</li> </ul>
<b>Ride share</b> 1%	<ul style="list-style-type: none"> <li>• Nil</li> </ul>
<b>Car share</b> 1%	<ul style="list-style-type: none"> <li>• Nil</li> </ul>
<b>Hire car</b> 3%	<ul style="list-style-type: none"> <li>• Nil</li> </ul>

Age, employment status and where respondents lived (both in terms of type of location, and distance from the centre of their nearest major centre) seemed to be the most influential factors.

## Supplementary sample results

The supplementary samples (which included all respondents in both the supplementary sample and the main sample who fell into each group) showed a similar broad pattern of results to the main sample.

There were some minor variations, in particular those on Centrelink benefits or with a disability reported slightly less use of a private vehicle and slightly higher use of buses and community transport.

Females and those aged over 40 did not report significantly different rates of use of public transport modes other than community transport.

**Modes of transport used within the last 6 months** <sup>Q9 – Supplementary samples</sup>

	Total Main Sample	Females	Aged 40+	Centrelink Benefits	Disability
Private vehicle	98%	97%	98%	95%*	95%*
Local bus	6%	8%	6%	9%	12%*
Community transport	2%	5%*	4%*	8%*	7%*
Courtesy transport	7%	7%	5%	4%*	5%
Taxi	16%	19%	16%	16%	18%
Ride share	1%	1%	1%	1%	1%
Car share	1%	1%	1%	1%	1%
Hire car	3%	3%	2%	2%	2%
None	1%	1%	1%	2%	1%
<i>Sample size (Supplementary Sample plus eligible main sample)</i>	<b>607</b>	551	771	384	169

\* Statistically significant differences from main sample average (red = below main; green = higher than main)

## Frequency of use

As overall rates of using most forms of transport in regional areas other than private vehicles is very low, the detailed breakdown of frequencies also shows a sparse distribution. However, the summary table below provides perhaps a more useful snapshot of the frequency of usage.

Frequency of using modes of transport within the last 6 months <sup>Q10</sup>

	5+ times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Total Used	Not used + Unsure
<b>Private vehicle</b>	78%	5%	9%	3%	1%	1%	0%	<1%	98%	2%
<b>Local bus</b>	1%	0%	1%	<1%	1%	1%	1%	1%	6%	94%
<b>Community transport</b>	<1%	0%	<1%	0%	<1%	<1%	<1%	1%	2%	98%
<b>Courtesy transport</b>	0%	0%	<1%	1%	1%	1%	4%	1%	7%	93%
<b>Taxi</b>	<1%	<1%	<1%	<1%	<1%	3%	8%	5%	16%	84%
<b>Ride share</b>	0%	0%	0%	<1%	<1%	<1%	1%	0%	1%	99%
<b>Car share</b>	0%	0%	<1%	<1%	0%	<1%	0%	0%	1%	99%
<b>Hire car</b>	0%	0%	<1%	0%	0%	<1%	1%	1%	2%	98%

This shows that the great majority of people who use private vehicles do so at least weekly, and around three-quarters do so daily. For other forms of transport, the frequency distribution closely mimics the respective levels of usage, with even only a third of those who reported using buses reporting using them at least weekly.

	Used at least weekly	Used at least monthly	Used at all in last six months
<b>Private vehicle</b>	95%	97%	98%
<b>Local bus</b>	2%	3%	6%
<b>Community transport</b>	1%	1%	2%
<b>Courtesy transport</b>	1%	2%	7%
<b>Taxi</b>	1%	4%	16%
<b>Ride share</b>	0%	1%	1%
<b>Car share</b>	0%	1%	1%
<b>Hire car</b>	0%	0%	2%

## Patterns of Use

Within the survey, members of both the main sample and the supplementary sample who had used different types of public transport within their local area were asked about several different aspects of their last trip. Across both the main and sample surveys there were relatively few respondents who had used these forms of transport. To maximise the value of the available interviews the total samples have been reported here, with no attempt to weight or make the samples representative.

	Bus	Community Transport	Courtesy Transport	Taxi	
<b>Used (in last 6 months)</b>	n=65 people	n=38 people	n=60 people	n=171 people	
<b>Reason(s) for use:</b>	<i>Of those 65:</i>	<i>Of those 38:</i>	<i>Of those 60:</i>	<i>Of those 171:</i>	
In last month / In last 6 months					
<b>Medical</b>	20% / 34%	<b>24% / 66%</b>	2% / 3%	7% / 23%	
<b>Work / business</b>	20% / 28%	14% / 14%	2% / 5%	4% / 16%	
<b>Shopping</b>	<b>38% / 63%</b>	16% / 24%	2% / 3%	10% / 20%	
<b>Social / recreation</b>	17% / 39%	8% / 8%	<b>30% / 97%</b>	<b>20% / 73%</b>	
<b>Education</b>	11% / 14%	5% / 8%	2% / 3%	0% / 5%	
<b>Other</b> <i>at all in last 6 months</i>	5%	0%	2%	9%	
<b>↓ Last Journey</b>					
<b>Purpose</b>	<b>Medical</b>	13%	<b>55%</b>	0%	12%
<i>Multiple responses allowed so columns may add to &gt;100%</i>	<b>Work / business</b>	20%	11%	2%	6%
	<b>Shopping</b>	<b>39%</b>	21%	0%	9%
	<b>Social / recreation</b>	16%	13%	<b>97%</b>	<b>66%</b>
	<b>Education</b>	8%	8%	0%	1%
	<b>Other</b>	8%	0%	2%	10%
<b>Used a RED ticket</b>	26%				
<b>One-way fare</b>	<i>If not used RED ticket...</i>				
	<b>Free</b>	11%	<b>33%</b>		0%
	<\$2	11%	3%		-
	<b>\$2 - &lt;\$5</b>	<b>61%</b>	8%		4%
	<b>\$5 - &lt;\$10</b>	11%	8%		14%
	<b>\$10 - &lt;\$20</b>	2%	19%		<b>60%</b>
	<b>\$20+</b>	4%	<b>28%</b>		23%
	<b>Can't recall</b>	(3%)	(5%)		(2%)
<b>Capacity</b>	<b>Only passenger</b>	3%	18%		
	<b>&lt;50% full</b>	<b>66%</b>	26%		
	<b>~50% full</b>	14%	26%		
	<b>&gt;50% full</b>	11%	8%		
	<b>Full</b>	6%	21%		
	<b>Can't recall</b>	(2%)	0%		
<b>Perceived Value</b>	<b>Yes</b>	<b>92%</b>	<b>87%</b>		<b>75%</b>
	<b>No</b>	5%	5%		23%
	<b>Unsure</b>	3%	8%		1%

Bold numbers show most common response

## B. Satisfaction with current transport services

### Existence of Transport Modes

Local buses, community transport, courtesy transport and taxis are widely available throughout the surveyed areas. Even for respondents who live in 'rural or remote areas', around two-thirds indicated that each type of transport was present – though this was a considerably lower proportion than in the smaller towns or especially the major regional centres.

Respondents in the Mid North Coast region reported the highest existence of transport services, but no region was consistently lower than average across all services.

Existence of transport modes in local region <sup>Q28a</sup>

	Exists	Central West	Murray-Murrumbidgee	Northern Rivers	Far West	New England	Mid North Coast
Local bus	<b>80%</b>	80%	71%	84%	65%*	69%*	93%*
Community transport	<b>80%</b>	82%^	80%	71%^	84%^	78%	85%^
Courtesy transport	<b>70%</b>	63%^	70%	67%	75%	69%	79%*
Taxi	<b>87%</b>	87%	81%	89%	72%*	87%	94%*
Sample size	576	101	101	102	100	103	100

	Exists	Major regional centre	Smaller town	Rural or remote location
Local bus	<b>80%</b>	92%*	79%	64%*
Community transport	<b>80%</b>	84%	82%	72%*
Courtesy transport	<b>70%</b>	86%*	61%*	65%
Taxi	<b>87%</b>	97%*	88%	70%*
Sample size	576	203	252	152

\* Statistically significant differences from main sample average (red = below main; green = higher than main)

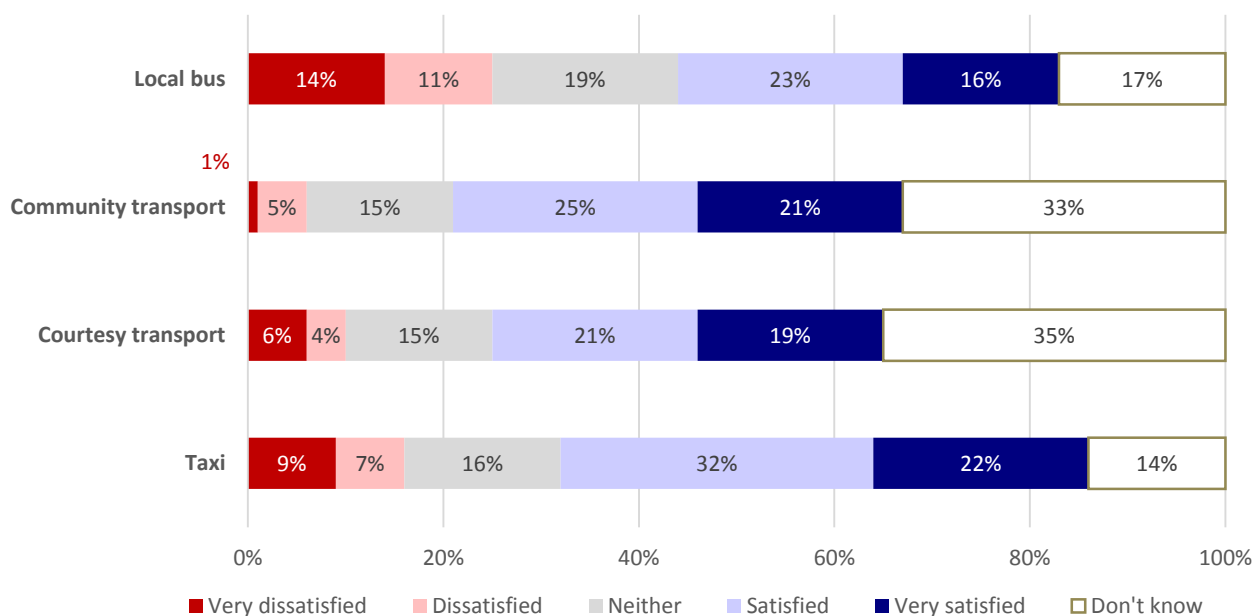
^ Results are not significantly different from the overall mean, but there is a significant difference from highest to lowest reported levels

### Satisfaction with Transport Services

There are only low to moderate levels of satisfaction with transport services available in regional areas.

Satisfaction was highest for taxis (54% of respondents indicated they were at least satisfied with the taxi service in their local region), and lowest for buses (39%) and Courtesy Transport (40%). Active dissatisfaction was highest for buses, with 25% of all respondents saying they were actively dissatisfied with the bus service available to them.

Satisfaction with transport modes in local region <sup>Q28b</sup>



	Very dissatisfied	Dissatisfied	Neither	Satisfied	Very satisfied	Don't know	Total Dissatisfied	Total Satisfied
<b>Local bus</b>	14%	11%	19%	23%	16%	17%	25%	39%
<b>Community transport</b>	1%	5%	15%	25%	21%	33%	6%	46%
<b>Courtesy transport</b>	6%	4%	15%	21%	19%	35%	10%	40%
<b>Taxi</b>	9%	7%	16%	32%	22%	14%	16%	54%

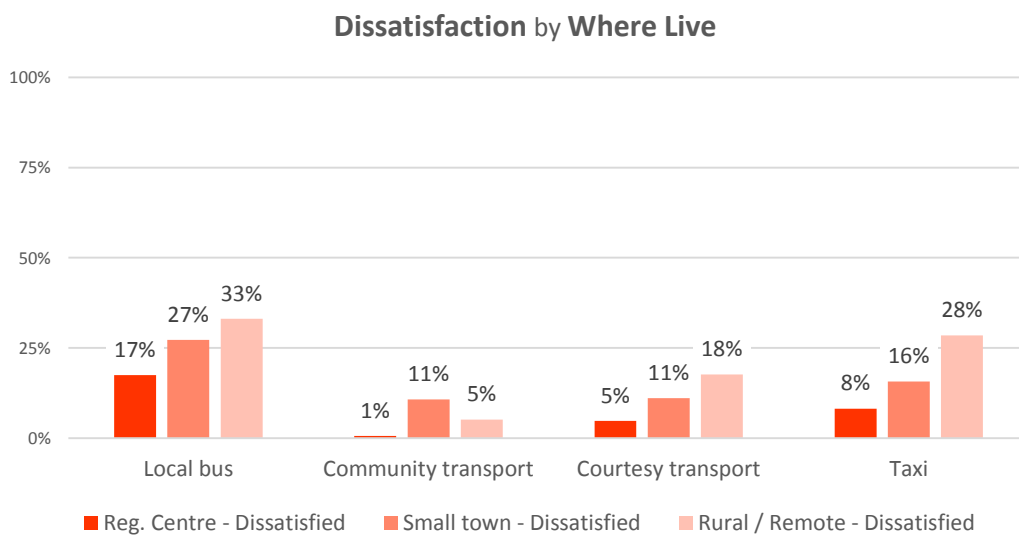
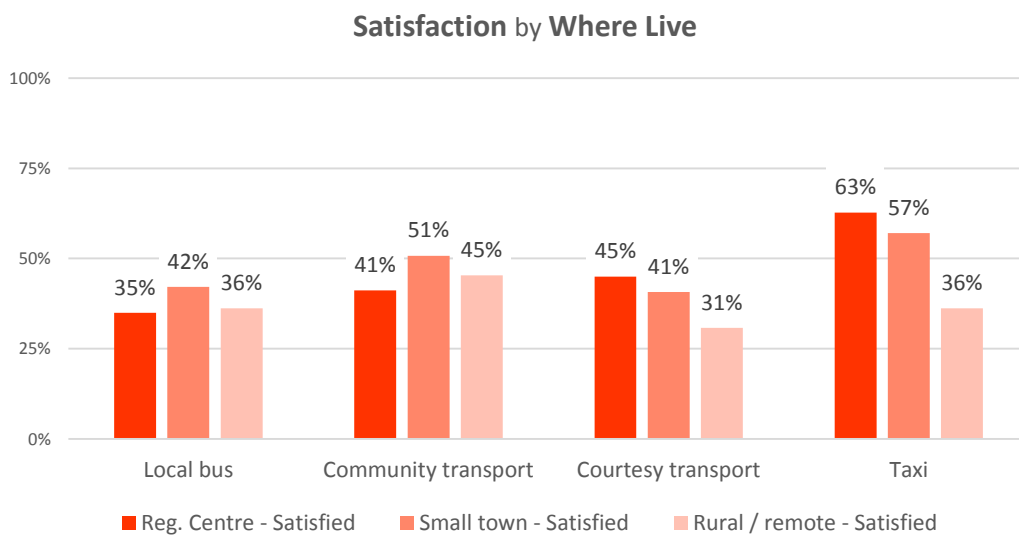
Even respondents who had no experience of transport services or in areas where certain services were not known to exist were asked to indicate their satisfaction with the level of service available to them, as this indicates the latent level of satisfaction and expectation in the community. Sample sizes for each service type varied – Bus n=551; Community Transport n=449; Courtesy Transport n=547; Taxi n=569.



Satisfaction with transport services doesn't vary across demographic groups, but does vary depending on where respondents lived. Both distance from a regional centre and the type of location have a clear relationship with satisfaction.

Active dissatisfaction with buses, taxis and courtesy transport all increase as people live further away from major regional centres. Active satisfaction, on the other hand, was higher in the more populated areas only for taxis and courtesy transport was.

**Satisfaction with transport modes in local region by where live** <sup>Q28b</sup>

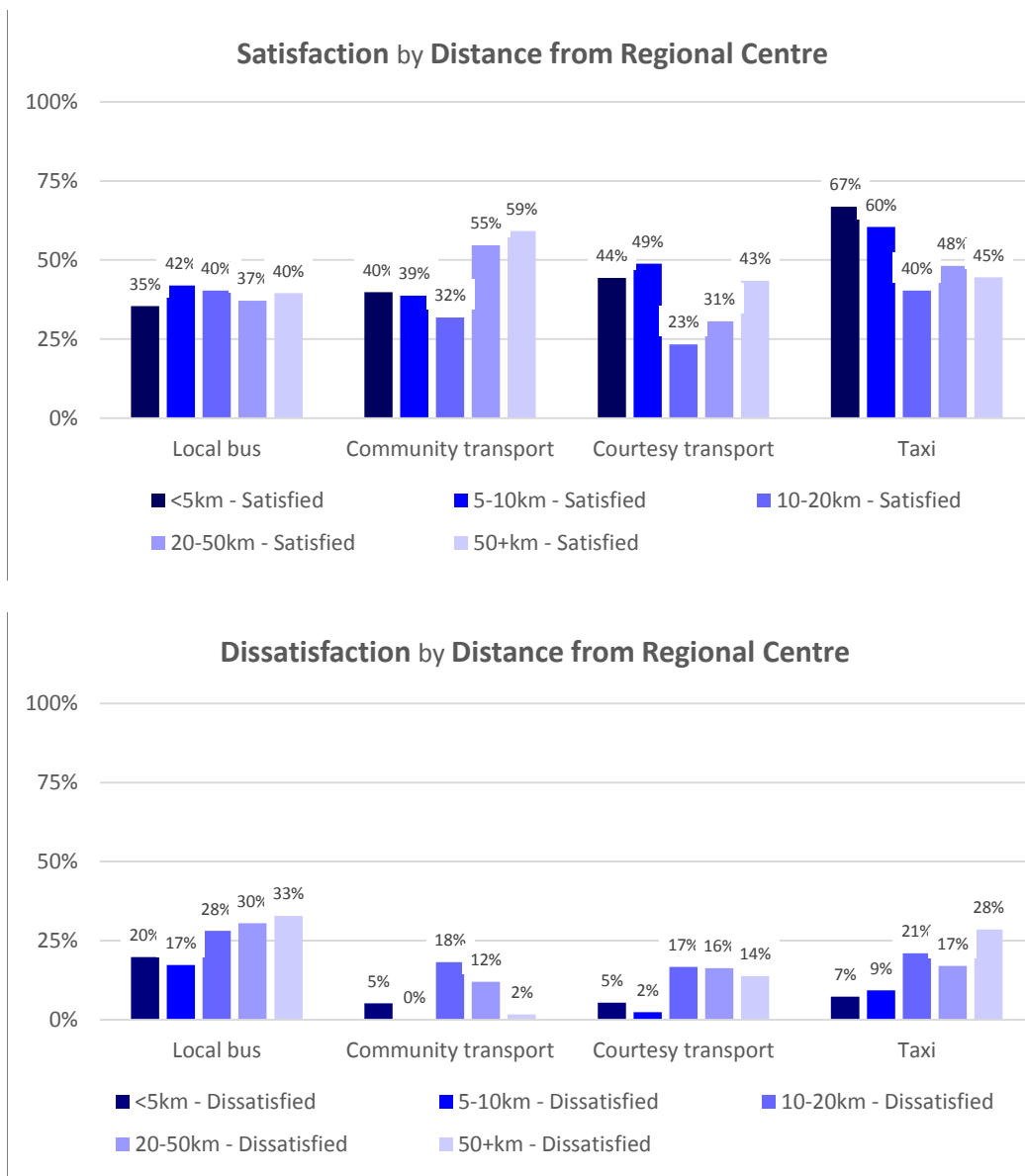


Sample sizes – Regional Centre n=203; Small town n=252; Rural and remote n=152

A similar pattern is observed when looking just at the distance respondents live from the centre of their nearest major regional centre, regardless of whether or not they live in that centre. Both satisfaction and dissatisfaction with taxis vary directly with distance. However, for buses while dissatisfaction increases with distance, satisfaction stays fairly flat.

Interestingly, satisfaction with both community transport and courtesy transport is lowest in the intermediate distances – from 10-20km and from 20-50km, suggesting that these distances might be a relative weakness for these types of transport services.

**Satisfaction with transport modes in local region by distance from regional centre** <sup>Q28b</sup>

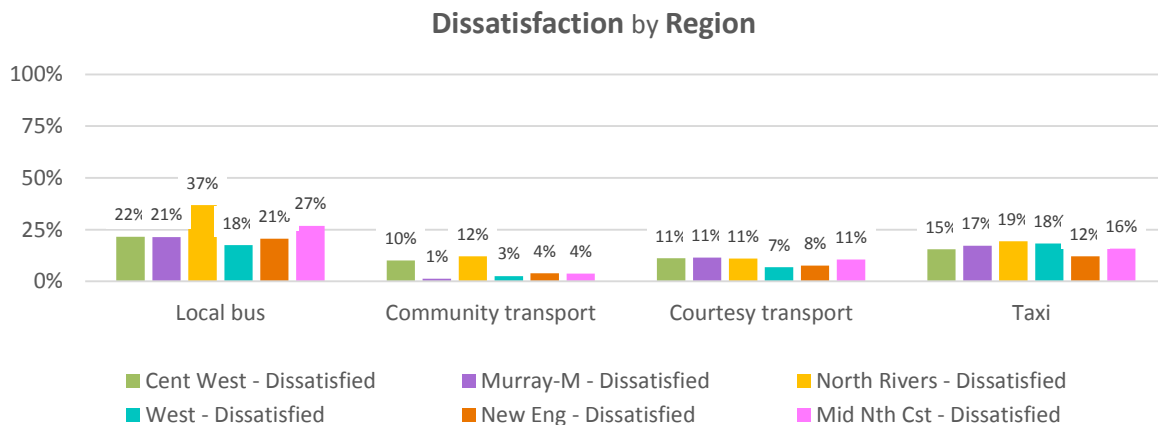
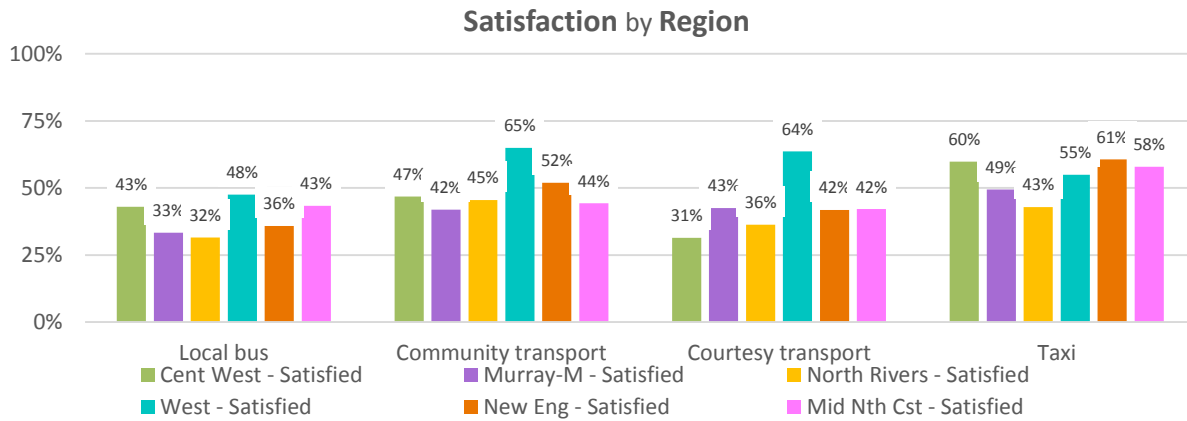


Sample sizes – <5km n=198; 5-10km n=86; 10-20km n=56; 20-50km n=102; 50+km n=165

Looking across regions, satisfaction was more similar than dissimilar. The Far West Region had the highest level of reported satisfaction with all types of transport, but the other regions showed relatively minimal variation.

Northern Rivers was the only region where more respondents said they were dissatisfied with the bus service than said they were satisfied.

**Satisfaction with transport modes in local region by Region** <sup>Q28b</sup>

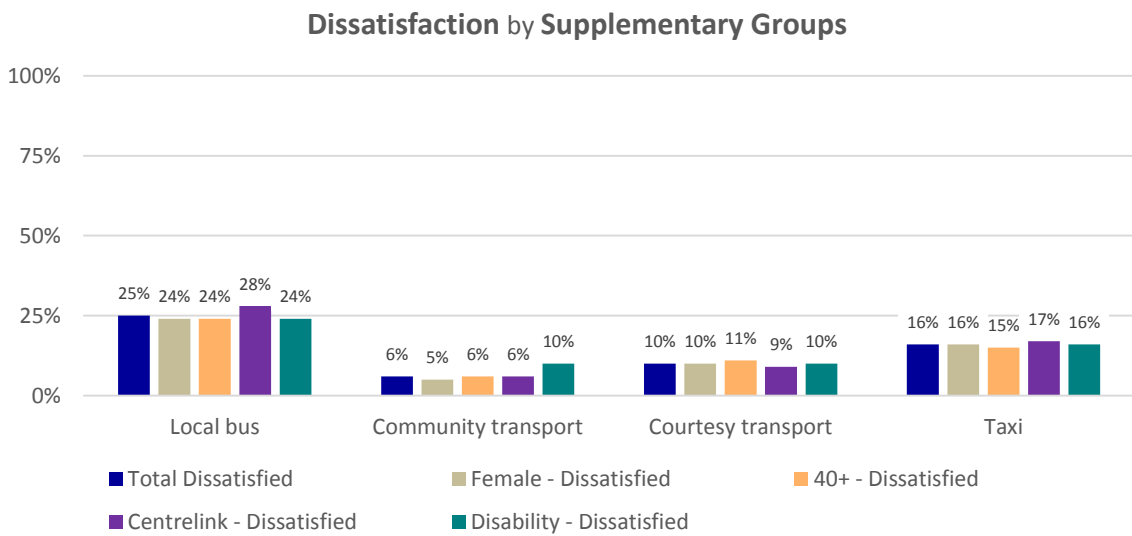
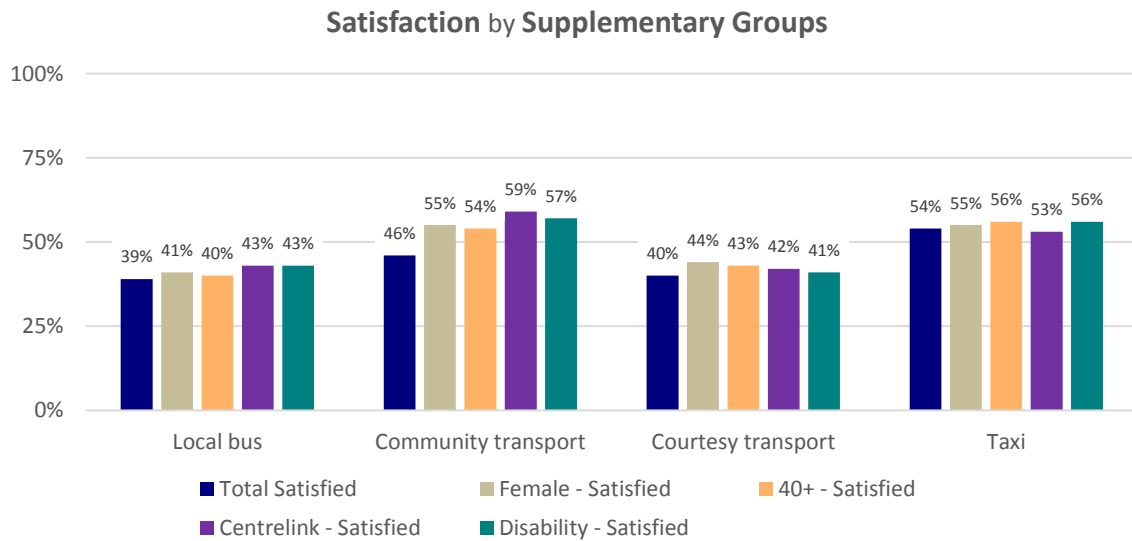


Sample sizes – Central West n=101; Murray-Murrumbidgee n=101; Northern Rivers n=102; Far West n=100; New England n=103; Mid North Coast n=100

### Supplementary Sample Results

There were no substantive differences in the satisfaction or dissatisfaction of any of the supplementary sample groups in comparison to the overall main sample averages.

**Satisfaction with transport modes in local region by Supplementary Groups** <sup>Q28b</sup>



Sample sizes – Females n=416-499; 40+ n=566-685; Centrelink benefits n=290-334; Disability n=131-151

<b>Females</b> (n=416-499)	Very dissatisfied	Dissatisfied	Neither	Satisfied	Very satisfied	Don't know	<b>Total Dissatisfied</b>	<b>Total Satisfied</b>
<b>Local bus</b>	14%	10%	20%	22%	19%	15%	<b>24%</b>	<b>41%</b>
<b>Community transport</b>	2%	3%	14%	23%	32%	26%	<b>5%</b>	<b>55%</b>
<b>Courtesy transport</b>	5%	5%	12%	21%	23%	33%	<b>10%</b>	<b>44%</b>
<b>Taxi</b>	9%	7%	16%	28%	27%	13%	<b>16%</b>	<b>55%</b>

<b>Aged 40+</b> (n=566-685)	Very dissatisfied	Dissatisfied	Neither	Satisfied	Very satisfied	Don't know	<b>Total Dissatisfied</b>	<b>Total Satisfied</b>
<b>Local bus</b>	14%	10%	18%	22%	18%	18%	<b>24%</b>	<b>40%</b>
<b>Community transport</b>	2%	4%	14%	24%	30%	26%	<b>6%</b>	<b>54%</b>
<b>Courtesy transport</b>	6%	5%	13%	22%	21%	33%	<b>11%</b>	<b>43%</b>
<b>Taxi</b>	9%	6%	15%	30%	26%	14%	<b>15%</b>	<b>56%</b>

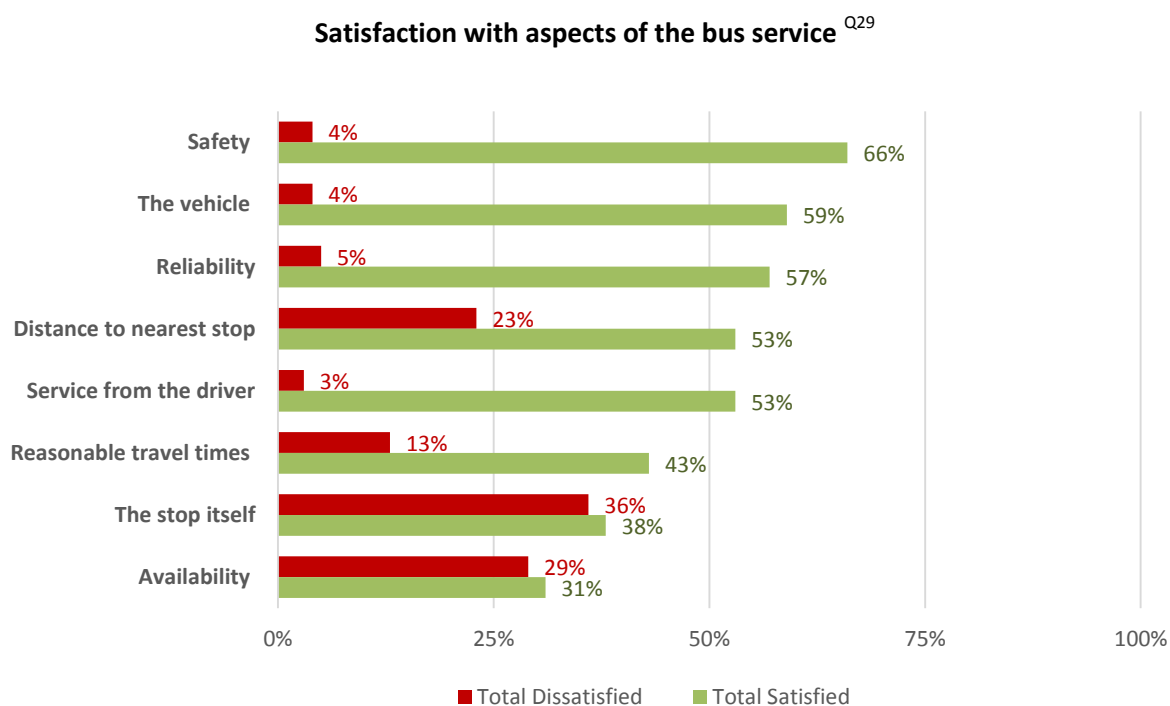
<b>Centrelink benefits</b> (n=290-334)	Very dissatisfied	Dissatisfied	Neither	Satisfied	Very satisfied	Don't know	<b>Total Dissatisfied</b>	<b>Total Satisfied</b>
<b>Local bus</b>	15%	13%	15%	20%	23%	14%	<b>28%</b>	<b>43%</b>
<b>Community transport</b>	2%	4%	13%	21%	38%	23%	<b>6%</b>	<b>59%</b>
<b>Courtesy transport</b>	5%	4%	11%	19%	23%	37%	<b>9%</b>	<b>42%</b>
<b>Taxi</b>	11%	6%	14%	27%	26%	16%	<b>17%</b>	<b>53%</b>

<b>Disability</b> (n=131-151)	Very dissatisfied	Dissatisfied	Neither	Satisfied	Very satisfied	Don't know	<b>Total Dissatisfied</b>	<b>Total Satisfied</b>
<b>Local bus</b>	16%	8%	18%	20%	23%	15%	<b>24%</b>	<b>43%</b>
<b>Community transport</b>	2%	7%	12%	23%	34%	21%	<b>9%</b>	<b>57%</b>
<b>Courtesy transport</b>	7%	3%	13%	18%	23%	36%	<b>10%</b>	<b>41%</b>
<b>Taxi</b>	9%	7%	15%	32%	24%	13%	<b>16%</b>	<b>56%</b>

## Satisfaction with Aspects of the Bus Services

Across all regions, respondents were most satisfied with the safety, vehicle amenity and reliability of their local bus services, and also with the service they expect or receive from drivers. Active dissatisfaction was less than 5% for all of these aspects.

The two most problematic aspects were availability and the quality of the nearest bus stop. Both of these aspects has as many respondents who were dissatisfied as were satisfied. Substantial minorities of respondents were also dissatisfied with the distance to the nearest stop, and the reasonableness of travel times.



	Very dissatisfied	Dissatisfied	Neither	Satisfied	Very satisfied	Don't know	Total Dissatisfied	Total Satisfied
<b>Safety</b>	2%	2%	12%	37%	29%	18%	4%	66%
<b>The vehicle</b>	1%	3%	14%	36%	23%	23%	4%	59%
<b>Reliability</b>	2%	3%	15%	31%	26%	22%	5%	57%
<b>Distance to nearest stop</b>	12%	11%	15%	22%	31%	9%	23%	53%
<b>Service from the driver</b>	1%	2%	13%	26%	27%	32%	3%	53%
<b>Reasonable travel times</b>	6%	7%	20%	25%	18%	23%	13%	43%
<b>The stop itself</b>	17%	19%	16%	21%	17%	10%	36%	38%
<b>Availability</b>	13%	16%	18%	18%	13%	23%	29%	31%

Base = bus services known to exist. Sample size n=473-480

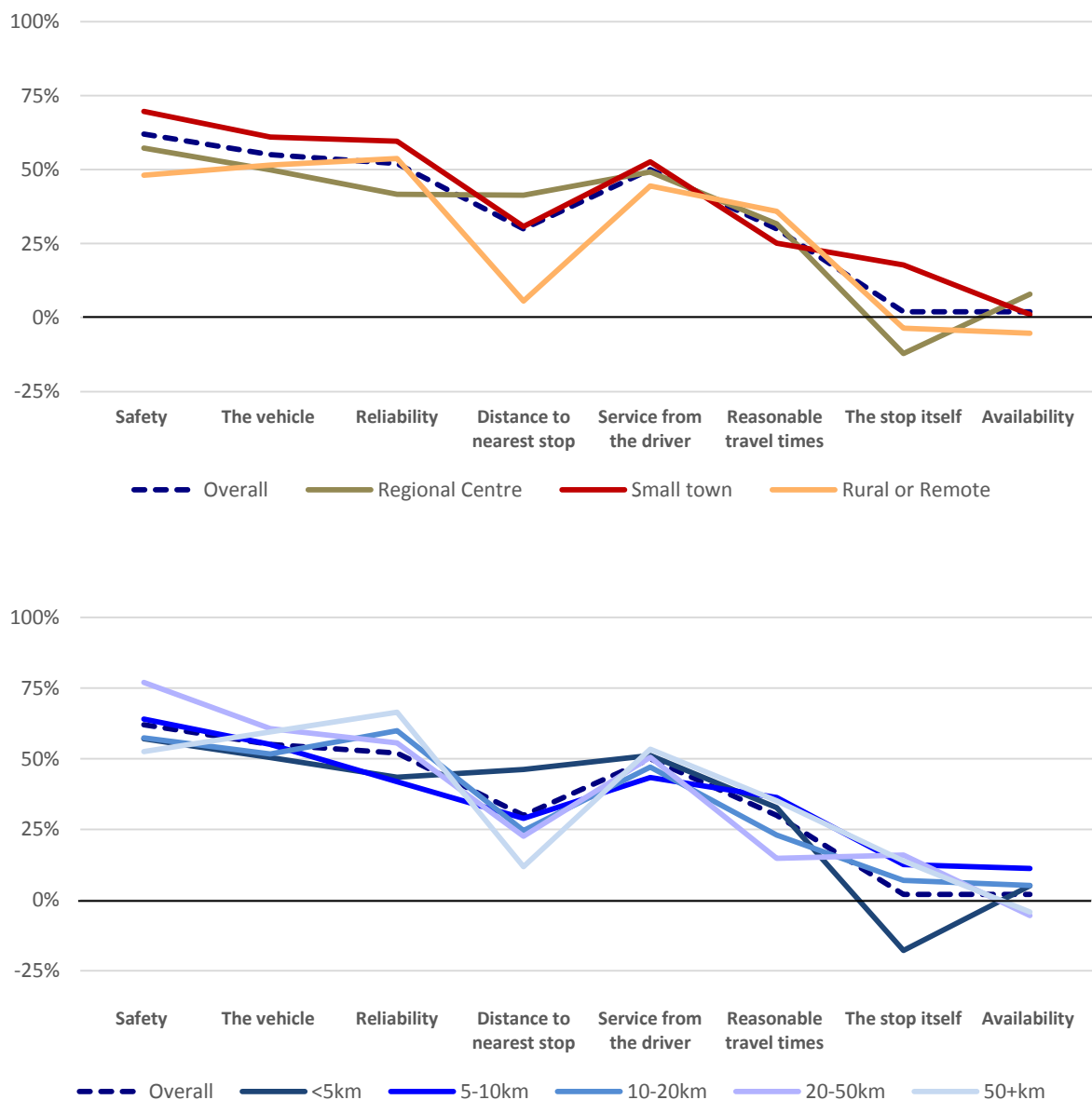
Looking at satisfaction across subgroups within the main sample, there is a suggestion that there may some particular “sensitivities” amongst groups, and this may provide some insight into ways which they may be encouraged to make more use of buses. Results shown in the table and charts that follow are ‘satisfaction differentials’ – that is, the total satisfied minus

the total dissatisfied (so higher numbers are more positive results, and negative numbers show that more people said they were dissatisfied than said they were satisfied).

There is little difference by gender – with males perhaps slightly less satisfied with the distance to the nearest stop and the stop itself, and also with the reliability and availability of bus services.

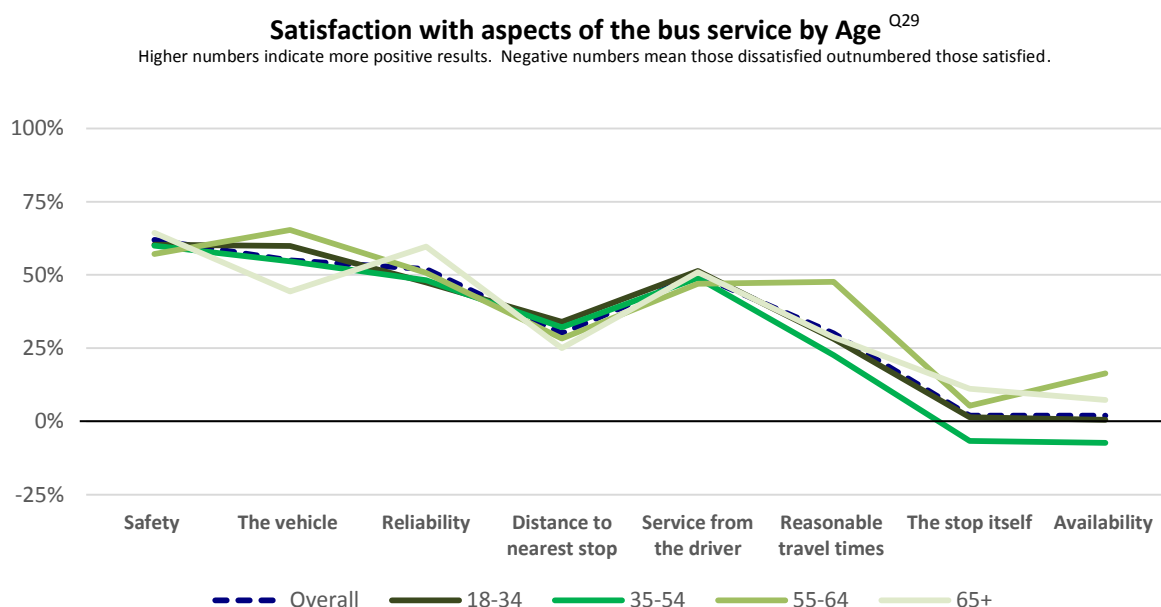
The biggest variations though, are once again seen with respect to where respondents live. Respondents from rural or remote locations, or who live 50+km from the centre of their regional centre may be particularly sensitive to the distance to their nearest stop; while those living closest to the middle of a regional centre may be more sensitive to the quality of the stop itself.

**Satisfaction with aspects of the bus service by Where Live & Distance from Regional Centre** <sup>Q29</sup>  
 Higher numbers indicate more positive results. Negative numbers mean those dissatisfied outnumbered those satisfied.



By age, older respondents (65+) may be the most sensitive to the perceived quality of the vehicle,

while those 35-54 seemed slightly more sensitive to the quality of the bus stop and to the availability of a bus. The 55-64 age group, by comparison, reported being least sensitive to the reasonableness of travel times and to availability.



	Overall n=607	Gender		Age			
		Female n=315	Male n=292	18-34 n=143	35-54 n=191	55-64 n=116	65+ n=157
<b>Safety</b>	<b>62%</b>	61%	60%	60%	60%	57%	64%
<b>The vehicle</b>	<b>55%</b>	53%	57%	60%	55%	65%*	44%*
<b>Reliability</b>	<b>52%</b>	55%	48%	47%^	48%^	51%	60%^
<b>Distance to nearest stop</b>	<b>30%</b>	34%^	26%^	34%	32%	28%	25%
<b>Service from the driver</b>	<b>50%</b>	50%	49%	51%	49%	47%	51%
<b>Reasonable travel times</b>	<b>30%</b>	28%	32%	28%^	23%^	48%*	29%^
<b>The stop itself</b>	<b>2%</b>	5%^	-1%^	1%	-7%*	5%	11%*
<b>Availability</b>	<b>2%</b>	4%	0%	1%	-7%*	16%*	7%*

	Overall n=607	Where Live			Distance from Regional Centre				
		Regional Centre n=203	Small town n=252	Rural or Remote n=152	<5km n=198	5-10km n=86	10-20km n=56	20-50km n=102	50+km n=165
<b>Safety</b>	<b>62%</b>	57%	70%*	48%*	57%	64%	57%	77%*	53%
<b>The vehicle</b>	<b>55%</b>	50%^	61%^	51%^	50%	55%	52%	61%	59%
<b>Reliability</b>	<b>52%</b>	42%*	60%*	54%	43%*	42%^	60%	56%	66%*
<b>Distance to nearest stop</b>	<b>30%</b>	41%*	31%	6%*	46%*	29%	25%	23%	12%*
<b>Service from the driver</b>	<b>50%</b>	49%	53%	45%	51%	43%	47%	51%	53%
<b>Reasonable travel times</b>	<b>30%</b>	32%	25%^	36%^	33%	36%	23%	15%*	35%
<b>The stop itself</b>	<b>2%</b>	-12%*	18%*	-4%*	-18%*	13%*	7%	16%*	14%*
<b>Availability</b>	<b>2%</b>	8%*	1%	-5%*	5%	11%*	5%	-5%*	-4%*

\* Statistically significant differences from main sample average (red = below main; green = higher than main)

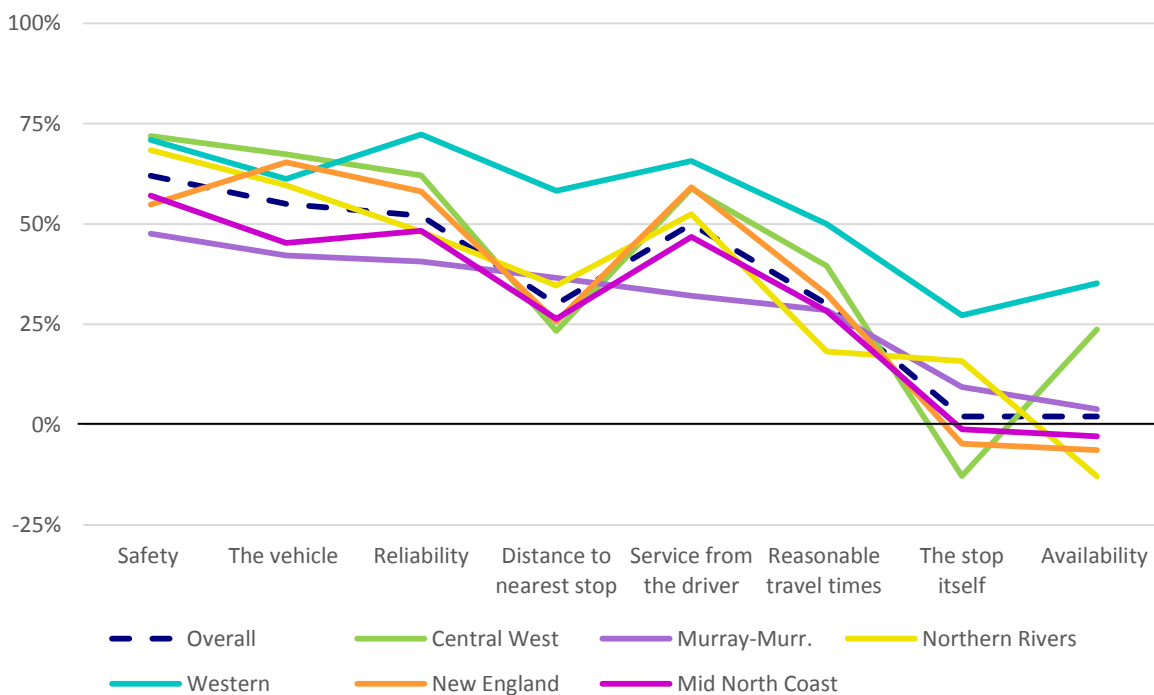
^ Results are not significantly different from the overall mean, but there is a significant difference from highest to lowest reported levels



At a regional level, respondents from the Far West Region tended to have the most positive satisfaction differentials, while Murray-Murrumbidgee had the least positive differentials for four of the eight aspects.

### Satisfaction with aspects of the bus service by Region <sup>Q29</sup>

Higher numbers indicate more positive results. Negative numbers mean those dissatisfied outnumbered those satisfied.



	Overall <i>n</i> =607	Central West <i>n</i> =101	Murray-Murr'bdgee <i>n</i> =101	Northern Rivers <i>n</i> =102	Far West <i>n</i> =100	New England <i>n</i> =103	Mid North Coast <i>n</i> =100
<b>Safety</b>	62%	72%*	48%*	68%	71%	55%	57%
<b>The vehicle</b>	55%	67%*	42%*	60%	61%	65%	45%
<b>Reliability</b>	52%	62%	41%*	48%	72%*	58%	48%
<b>Distance to nearest stop</b>	30%	23%	37%	35%	58%*	26%	26%
<b>Service from the driver</b>	50%	59%	32%*	52%	66%*	59%	47%
<b>Reasonable travel times</b>	30%	40%	28%	18%*	50%*	32%	28%
<b>The stop itself</b>	2%	-13%*	9%*	16%*	27%*	-5%	-1%
<b>Availability</b>	2%	24%*	4%	-13%*	35%*	-6%*	-3%

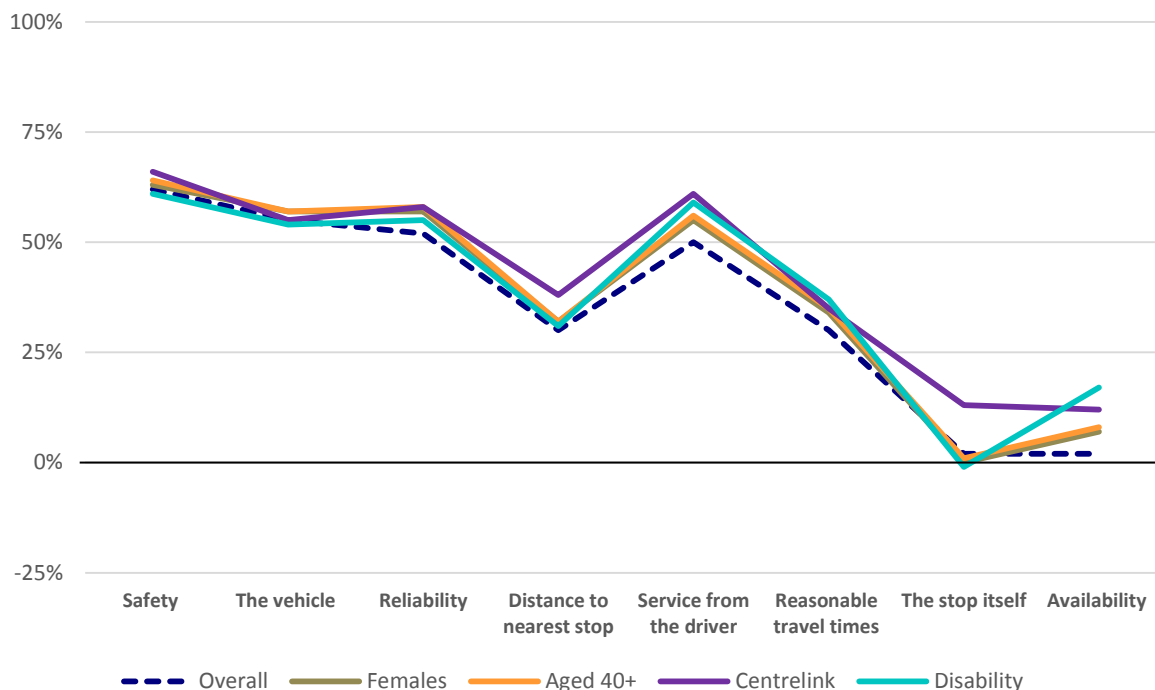
\* Statistically significant differences from main sample average (red = below main; green = higher than main)

^ Results are not significantly different from the overall mean, but there is a significant difference from highest to lowest reported levels

### Supplementary Sample Results

The full supplementary samples (consisting of the additional interviews plus all respondents from the main survey who fit into each group of interest) showed minimal substantive differences to the overall regional population. All their statistically significant differences were in the direction of having slightly more positive satisfaction differentials, but all were only small in terms of absolute magnitude.

**Satisfaction with aspects of the bus service by Supplementary Samples** <sup>Q29</sup>  
 Higher numbers indicate more positive results. Negative numbers mean those dissatisfied outnumbered those satisfied.



	Overall <i>n=607</i>	Females <i>n=551</i>	Aged 40+ <i>n=770</i>	Centrelink Benefits <i>n=384</i>	Disability <i>n=169</i>
<b>Safety</b>	<b>62%</b>	63%	64%	66%	61%
<b>The vehicle</b>	<b>55%</b>	58%	57%	55%	54%
<b>Reliability</b>	<b>52%</b>	58%	58%*	58%	55%
<b>Distance to nearest stop</b>	<b>30%</b>	34%	32%	38%*	31%
<b>Service from the driver</b>	<b>50%</b>	56%	56%*	61%*	59%*
<b>Reasonable travel times</b>	<b>30%</b>	33%	35%	35%	37%
<b>The stop itself</b>	<b>2%</b>	-2%	1%	13%*	-1%
<b>Availability</b>	<b>2%</b>	7%*	8%*	12%*	17%*

\* Statistically significant differences from main sample average (red = below main; green = higher than main)

^ Results are not significantly different from the overall mean, but there is a significant difference from highest to lowest reported levels

## Failed Trips and Substitutions

### Incidents

15% of all respondents in the main survey indicated that in the last six months there had been at least one occasion where they have considered or tried to use a bus to get around their local region, but did not do so.

- Of the relatively small number of people who had used buses or courtesy transport in the last six months, a higher proportion reported considering or trying to use a bus but not doing so. Of 38 people who had caught buses, 10 (26%) had also had an occasion when they did not end up catching a bus; and of the 41 who had used courtesy transport 13 had considered using a bus but did not (32%).
- Younger people reported being more likely to consider or try to catch a bus but not end up using one. 24% of the 18-34 age group indicated this, dropping down to just 6% of those aged 65+.
- Although they all make up small sub-samples in the survey, more than a quarter of the people who identified as students, unemployed or who worked in the not-for-profit sector indicated they had had an incident where they considered or tried to use buses but did not do so.

Of the **supplementary samples**, only those people who identified as having a disability showed a higher incident rate of these considered or failed trips – at 25%. Each of the other groups was between 12% and 17%, not significantly different to the overall sample.

However, the reported rate of considering or trying to use buses but not doing so *did* vary more markedly across the six regions. Four of the six regions showed a ratio of approximately twice as many people reporting considering or failing to catch a bus as who actually did. However, Northern Rivers reported a ratio of 5:1, while Murray-Murrumbidgee was close to 1:1.

#### Incidence of 'failed' trips <sup>Q38</sup>

Within the last 6 months have you...	Overall	Central West	Murray-Murrumbidgee	Northern Rivers	Far West	New England	Mid North Coast
Used a Local bus	6%	3%^	7%	5%	6%	6%	10%^
Considered or tried to use a local bus, but did not do so	15%	5%*	8%*	26%*	14%	13%	22%
<b>Ratio</b>	<b>2.5</b>	<b>1.7</b>	<b>1.1</b>	<b>5.2</b>	<b>2.3</b>	<b>2.2</b>	<b>2.2</b>
Sample size	607	101	101	102	100	103	100

\* Statistically significant differences from overall average

^ Results are not significantly different from the overall mean, but there is a significant difference from highest to lowest reported levels

## Substitutions

By far the most common end result was that people who did not catch a bus after considering or trying to do so ended up driving themselves. Three quarters of those respondents who said they had had at least one such experience reported they ended up driving themselves (77%).

12% reported getting a taxi, while 4% used courtesy transport.

Only 4% reported that they did not end up making the journey at all.

There are only small samples of people from the four **supplementary samples** who fell into the category of having had an experience where they had considered or tried to catch a bus but did not. They showed a similar pattern of substitutions to the overall result – but it is potentially of note that across all four of these groups that the proportion who did not make the trip at all was slightly higher at 9-10%.

## C. On-demand transport services

One of the objectives of the research was to look at interest and drivers with respect to the possibility of a more ‘on-demand’ bus service in regional areas. Because respondents generally will have no experience of this concept, the questions need to stay reasonably indirect and high level – as to simply ask whether they would like such a service is to invite an over-inflated positive response such as is often seen in concept-testing research. This section instead scans respondents’ reactions to the concept in several different ways.

The concept was initially introduced by the following description:

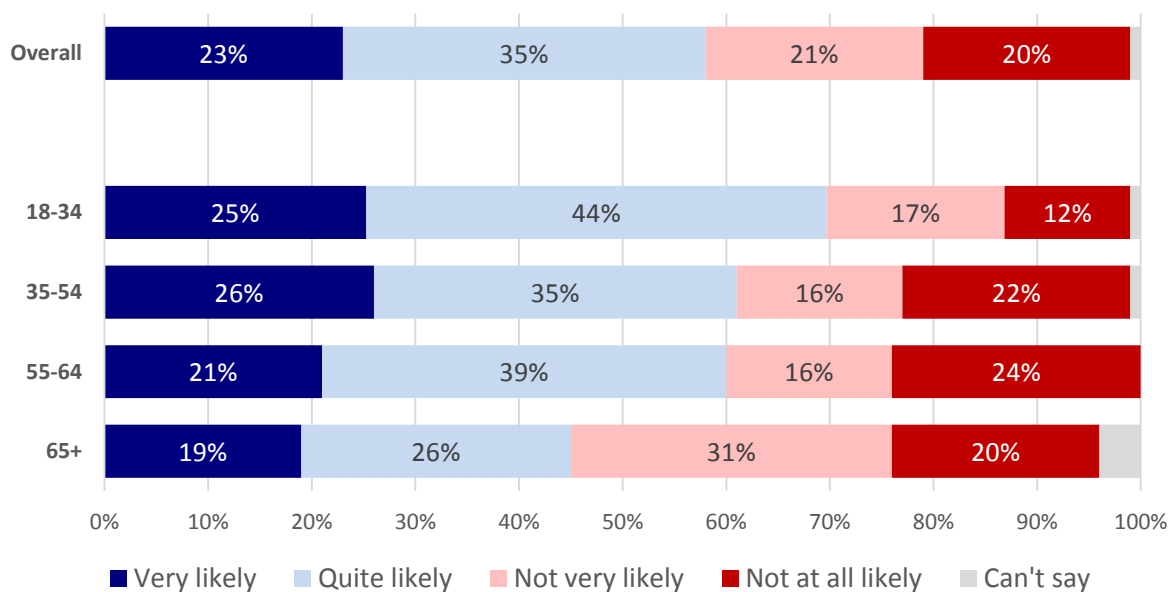
*I'd like you to now imagine a new bus service that you can pre-book and provides more flexibility in terms of when and where you can get picked up and dropped off. It could pick you up, plus other passengers along the way, and drop you off at any location that you request, including your own home.*

### Interest

A little over half of all respondents to the survey (58%) said they would be *very likely* or *quite likely* to use an on-demand bus service like the one described – indicating a level of interest in the concept.

The concept was particularly appealing to younger people. Interestingly, there was no apparent extra appeal to those people already using buses or taxis, but over 4-in-5 of the people who reported using courtesy transport in the last six months said they were *at least quite interested* in the on-demand bus concept. There was no significant difference in interest in the concept across the six regions, and somewhat unexpectedly, there was no difference based on where respondents lived.

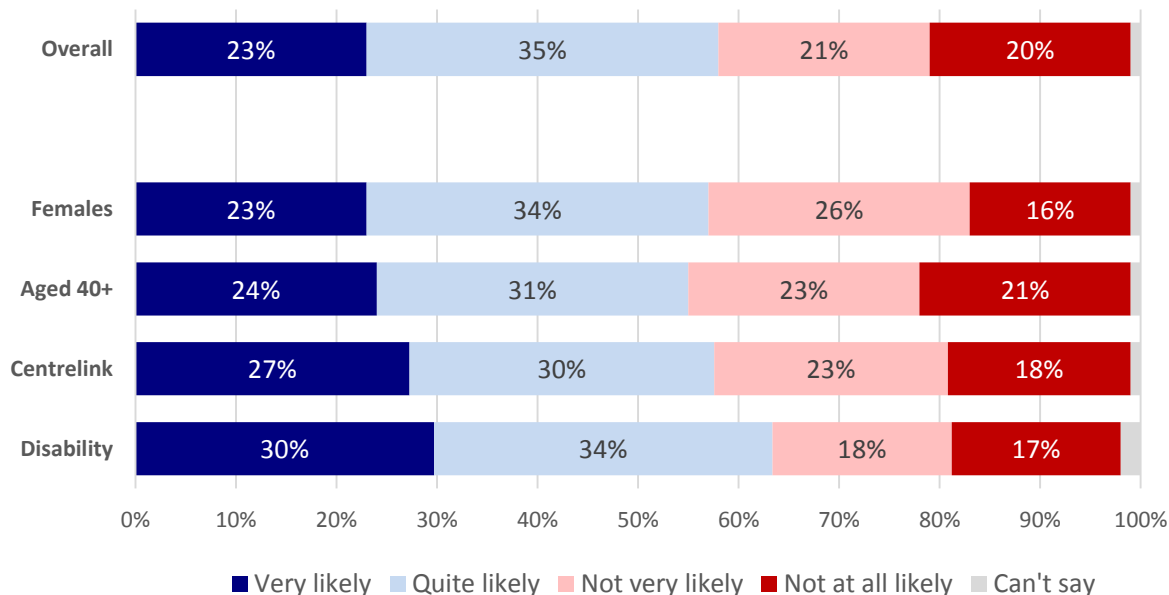
Interest in using an on-demand bus service if the fare is reasonable <sup>Q33</sup>



Sample sizes – Overall n=607; 18-34 n=143; 35-54 n=191; 55-64 n=116; 65+ n=157

Amongst the **supplementary samples** interest was highest amongst the Disability group (64% at least quite interested), but not dramatically so.

**Interest in using an on-demand bus service if the fare is reasonable by Supplementary Samples** <sup>Q33</sup>



Sample sizes – Overall n=607; Females n=551; Aged 40+ n=770; Centrelink benefits n=384; Disability n=169

**Calibrating likely usage**

Given that just 6% of respondents reported using buses at present, and only 16% using taxis, it is unlikely that the introduction of an on-demand bus service would see anything like a perfect conversion of these expressions of interest into actual usage. Experience shows us that very often concept testing research suggests higher take-up than eventuates, and this is likely because in the research setting there are no actual barriers or costs to expressing interest, but which do exist in the real world.

There are no clear formulas for calibrating stated intent to probable behaviour, however, the following heuristic might give a more realistic estimation of likely behaviour:

- Assume 1-in-3 of the people who say they are *very likely* may use the service
- Assume 1-in-10 of those who say they are *quite likely*
- Assume 1-in-20 of those who say they are *not very likely*, and
- Assume 1-in-100 of those who say they are *not at all likely*.

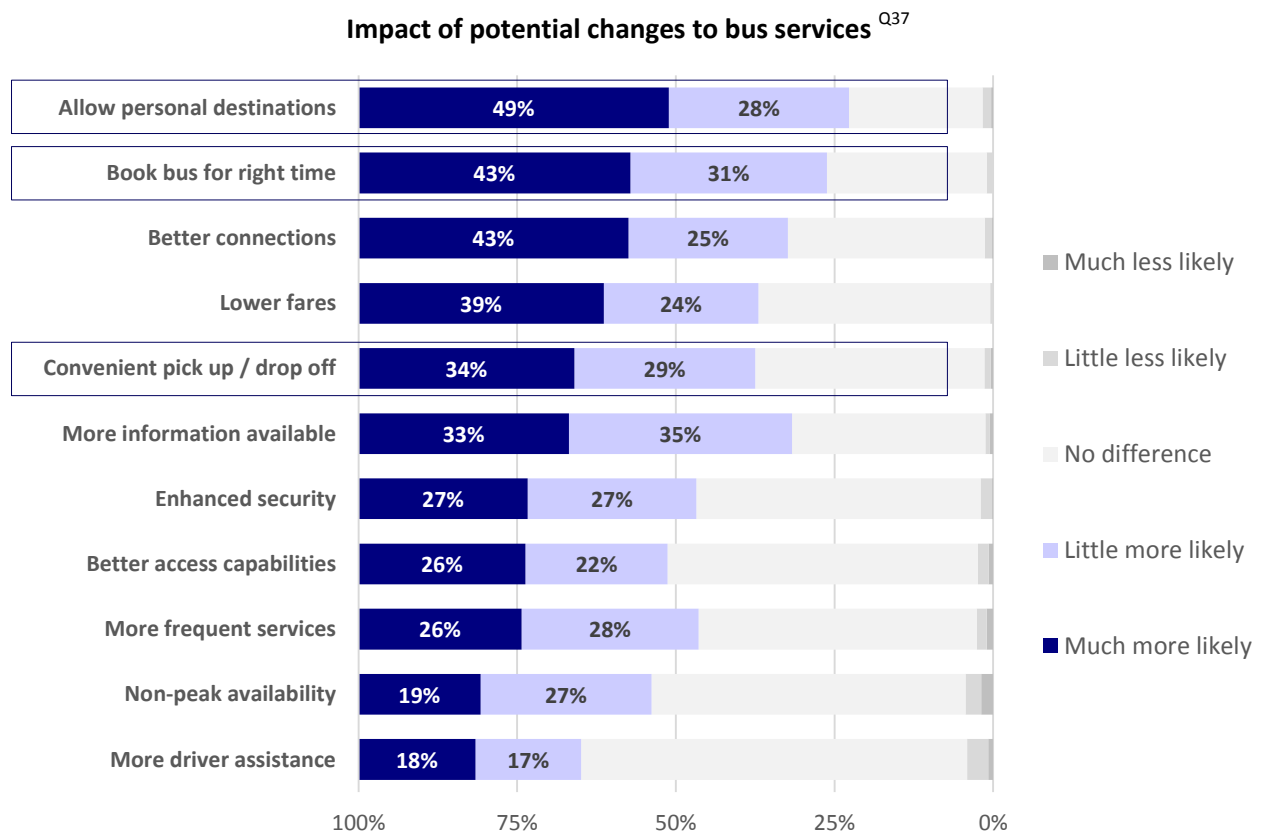
Using this rule-of-thumb conversion we would estimate that around 12% of all people may use the service.

This is not in any way intended to be a prediction of actual usage volumes, but rather just to provide a more realistic basis upon which we might anticipate the way a community might respond.

### Impact of Potential Bus Service Changes

There are many facets of a bus trip, and the on-demand concept addresses several of these, but not all. To test the relative importance of these facets, respondents were asked to consider a wider range of possible changes and whether each would make them more or less likely to use buses, or to make no difference to them.

Interestingly (and it should be noted that respondents to the survey *had* been primed at the time of this question by previous discussion of the on-demand service), the key features of an on-demand bus service were the *most* appealing of the various changes described.



Almost all aspects were of particular appeal to the small group of people who have used courtesy transport in the last six months, with this group typically being 10-20% more likely to say it made them *much more likely* to use a bus service. Those who actually currently use buses were not substantively different to the rest of the respondents.

Congruent with the observation that younger people were more likely than older people to find the on-demand concept interesting, they also tended to be a little more attracted to many of these aspects, though rarely by a substantial proportion. *Personal destinations* and *non-peak availability* showed the biggest change over the age ranges (both 13-16% different from youngest to oldest).

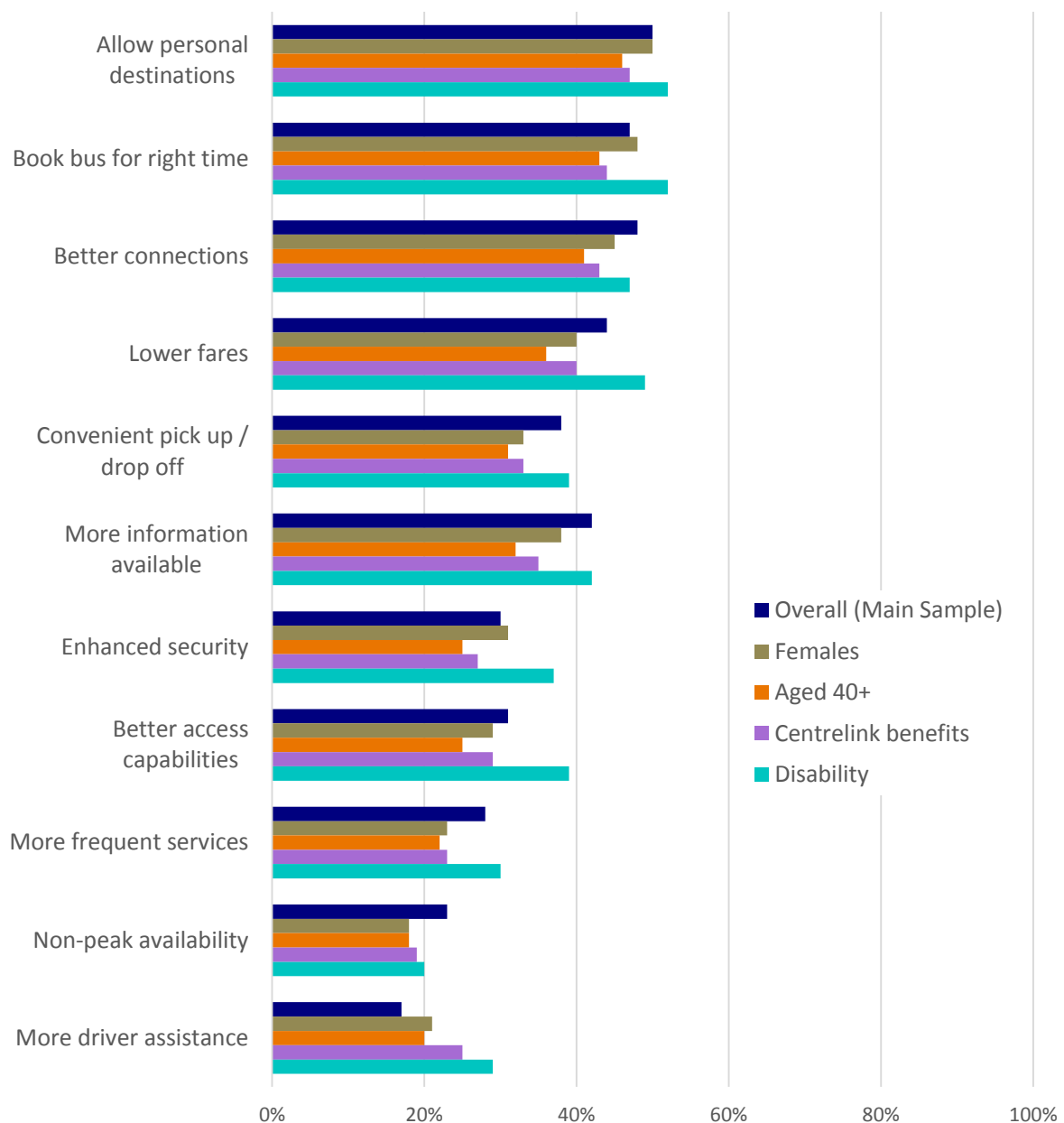
Those in small towns were the most attracted to all aspects – being 10-21% more likely to say each made them *much more likely* to use a bus service than those in major regional centres, and 3-14% than those in rural or remote areas. In a similar vein, those who live 10-20km from the centre of their nearest regional centre were generally the most attracted to each aspect.

### Supplementary Sample Results

The four supplementary sample groups again varied only minimally from the wider respondent group, and the broad pattern was more similar than dissimilar across groups.

Across virtually all facets, the disability group was the most attracted to each one – and they were the only group to be consistently more attracted to the possible transport service changes than was the wider respondent group. Given the relative attractiveness of these possible changes to younger people, it is not surprising to see the over 40 age group as the least attracted to each of them.

**Impact of potential changes to bus services by Supplementary Samples** <sup>Q37</sup>  
 Showing only % "Much more likely" to use buses



Sample sizes – Overall n=607; Females n=551; Aged 40+ n=770; Centrelink benefits n=384; Disability n=169



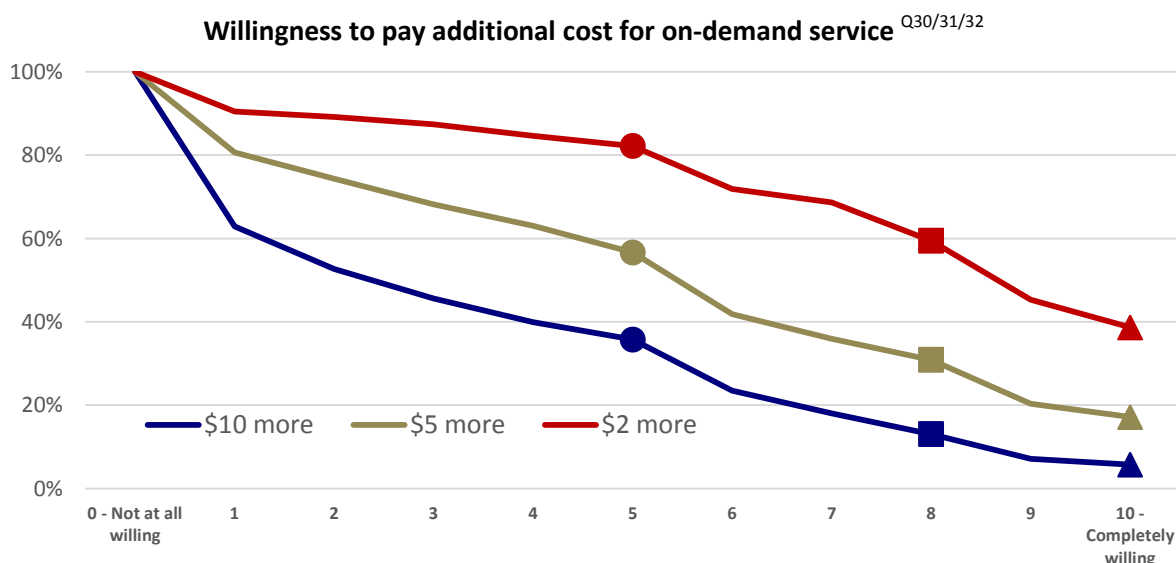
### Price Sensitivity

One of the considerations for an on-demand bus service is how to set appropriate prices. As with estimating behaviour, where there is no concrete ‘cost’ respondents in surveys can only provide indicative information about what they would consider reasonable prices for products and services. In this case, the research sought to explore ‘price sensitivity’ amongst the regional communities. This was done by asking respondents how willing they would be to pay more for an on-demand bus service than *the current fare for a similar bus journey*. While deliberately non-specific, this approach was intended to make it as easy as possible for respondents in a wide variety of situations and with varying degrees of experience of the current bus system to still provide data.

The chart and table below show the drop off in willingness to pay three different levels of additional cost for an on-demand service. It shows that 82% of respondents were “moderately willing” (5 out of 10) to pay an additional \$2, but only 57% were that willing to pay \$5 extra and just 36% were that willing to pay \$10 extra.<sup>2</sup>

To reach a higher level of willingness – 8 out of 10 – these proportions drop down to 59% for an extra \$2, 31% for an extra \$5 and 13% for an extra \$10. Only 39% were ‘completely willing’ to pay an extra \$2, 17% to pay an extra \$5, and 6% to pay an extra \$10.

The median willingness to pay responses (ie: the point where half are above and half are below) was 8/10 for \$2 extra, 5/10 for \$5 extra, and just 2/10 for \$10 extra.



	Level of willingness			Averages	
	● At least 5 out of 10	■ At least 8 out of 10	▲ “Completely willing” 10 out of 10	Mean	Median <sup>#</sup>
<b>\$2 more</b>	82%	59%	39%	7.2/10	8/10
<b>\$5 more</b>	57%	31%	17%	4.9/10	5/10
<b>\$10 more</b>	36%	13%	6%	3.0/10	2/10

Base exclude “Don’t Know” and “Not Applicable” responses.

Sample sizes – \$10 more n=561, \$5 more n=553, \$2 more n=558

# The median is the point where 50% of respondents are above and 50% are below.

<sup>2</sup> Note: the sequence shown in the survey was alternated from high-low and low-high to avoid order effects

The median willingness to pay figures will be used to compare different groups.

Amongst the main sample, only age impacted on willingness to pay, with older people significantly less likely to be willing to pay either \$5 or \$10 extra to use an on-demand bus service.

- 18-34 year olds had a median willingness to pay an extra \$10 of 3/10, which dropped down to 1/10 for the 65+ age group.
- Willingness to pay an extra \$5 dropped from a median of 6/10 amongst 18-34 year olds down to 4/10 for 55-64 and 65+ respondents.

There were no statistically significant differences by region.

In the way the questionnaire was structured to introduce the concept of a more flexible on-demand style bus service, the willingness to pay question was actually asked prior to the overall likelihood of using the service (this enabled the approximate magnitude of a price difference to be communicated).

However, and as may be anticipated, the table below shows that ultimately people who were more willing to pay an extra amount were indeed more likely to use the service. What is most interesting in this is that those people who considered themselves *very likely* to use the service (22% of all respondents) did show a considerably higher willingness to pay an extra \$5 (or even an extra \$10) compared to the rest of the respondents.

Provided you feel the fare is reasonable, how likely would you be to use the more flexible bus service like the one described? <sup>Q33</sup>				
	Very likely [22%]	Quite likely [35%]	Not very likely [21%]	Not at all likely [20%]
<b>\$2 more</b>	10/10	9/10	7/10	5/10
<b>\$5 more</b>	7/10	5/10	4/10	1/10
<b>\$10 more</b>	5/10	3/10	1/10	0/10

#### Non-bus users interested in on-demand services

Because current use of buses was quite low, the group of respondents who are current non-users of buses is very similar to the overall results in the table above. 54% of all respondents were non-bus users who were *at least quite likely* to use on-demand services. The comparable median figures for this group were 10/10 at \$2 more, 6/10 at \$5 more, and 4/10 at \$10 more.

#### Supplementary Sample Results

The supplementary samples also showed very similar results in terms of willingness to pay.

Overall, the total women and 40+ supplementary samples showed the same median scores as the main sample at each price point.

The Centrelink benefits group were slightly less willing to pay an extra \$10 (median = 1/10).

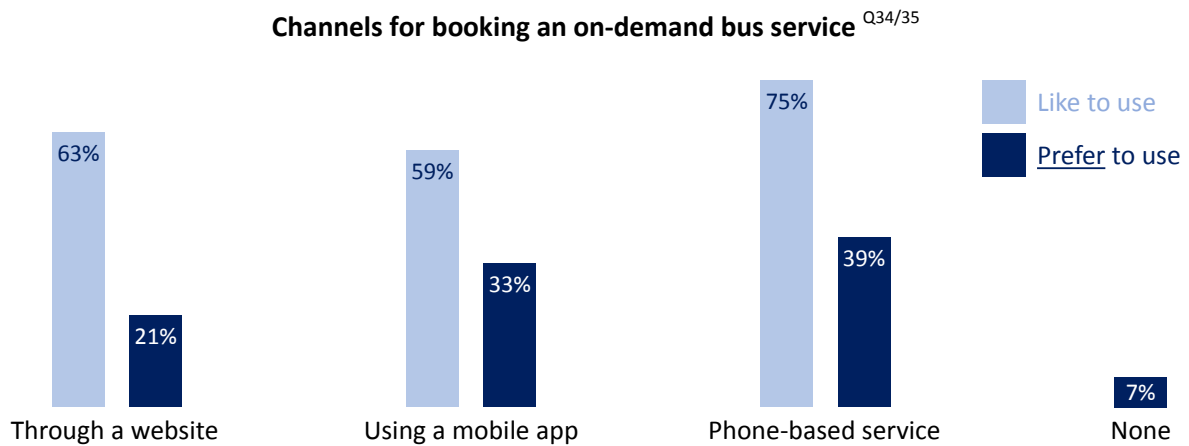
The Disability group were slightly less willing to pay at both the \$5 point (4/10) and the \$10 point

(1/10).

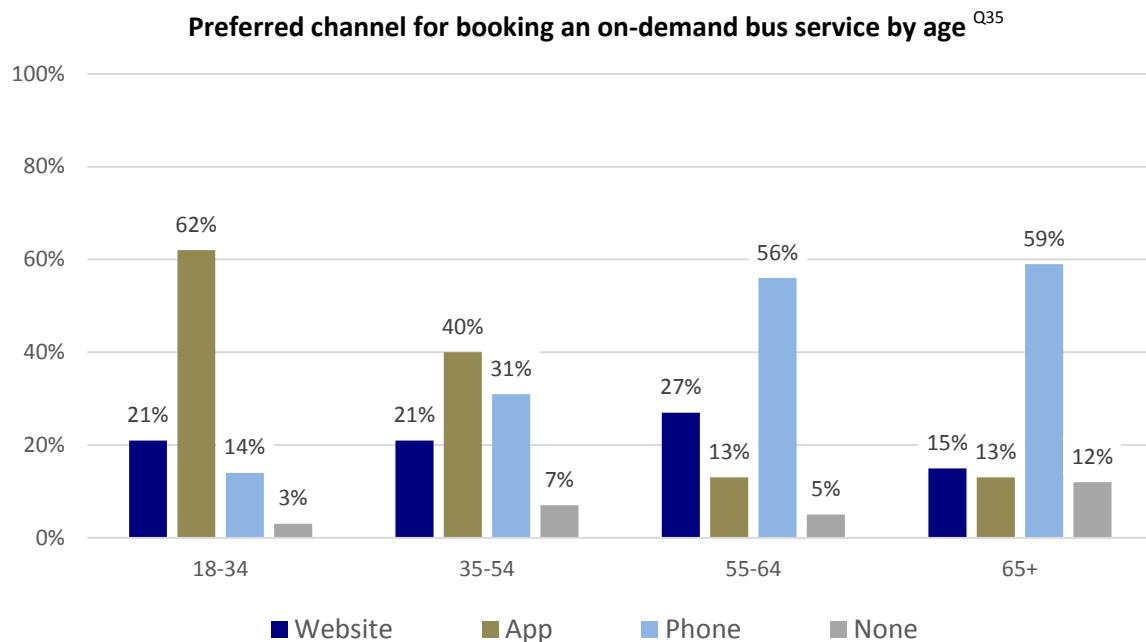
## Channels

### Bookings

There is no clearly dominant channel that respondents wished to use to be able to book an on-demand bus service, but there is a substantial proportion who would both like to and prefer to use a telephone-based service rather than a digital channel.



As has been seen in the banking and financial industries (amongst others), the older cohorts of the Australian population continue to drive a strong demand for government services to be delivered through channels other than purely digital ones.



Sample sizes –18-34 n=139; 35-54 n=188; 55-64 n=108; 65+ n=158

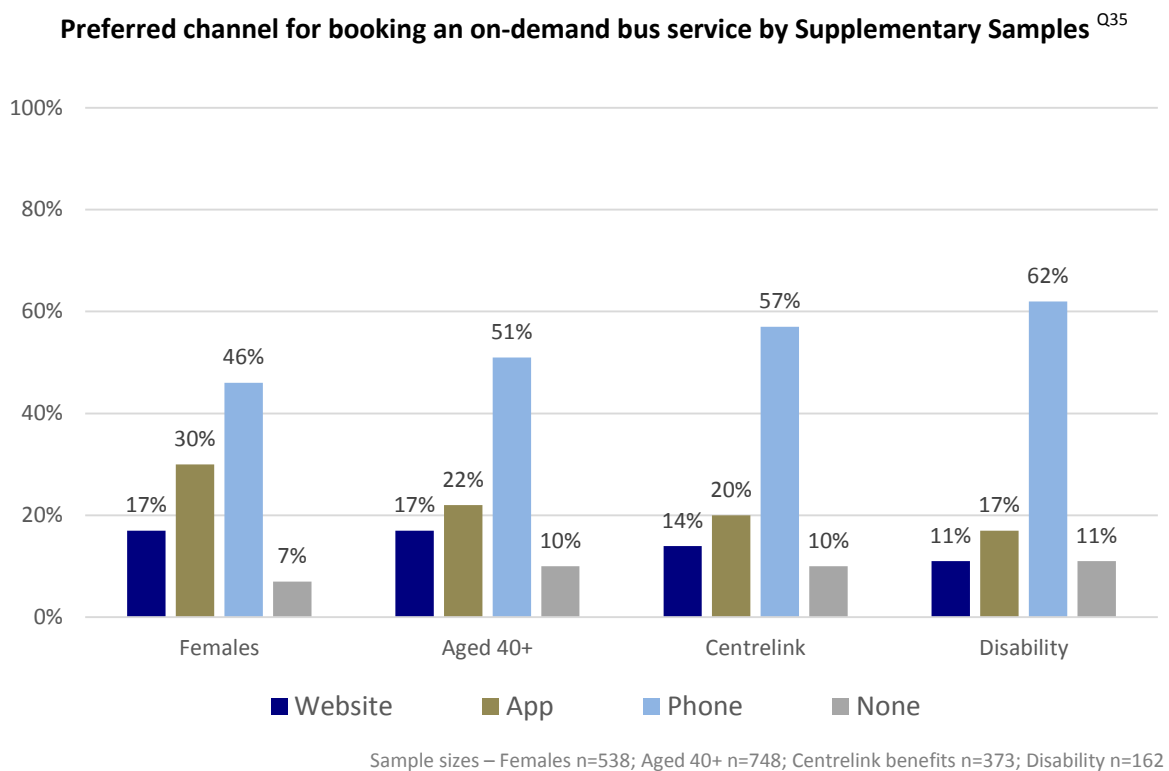
As might be expected, there were no significant differences in preferences for booking channels

between regions.

### Supplementary Sample Results

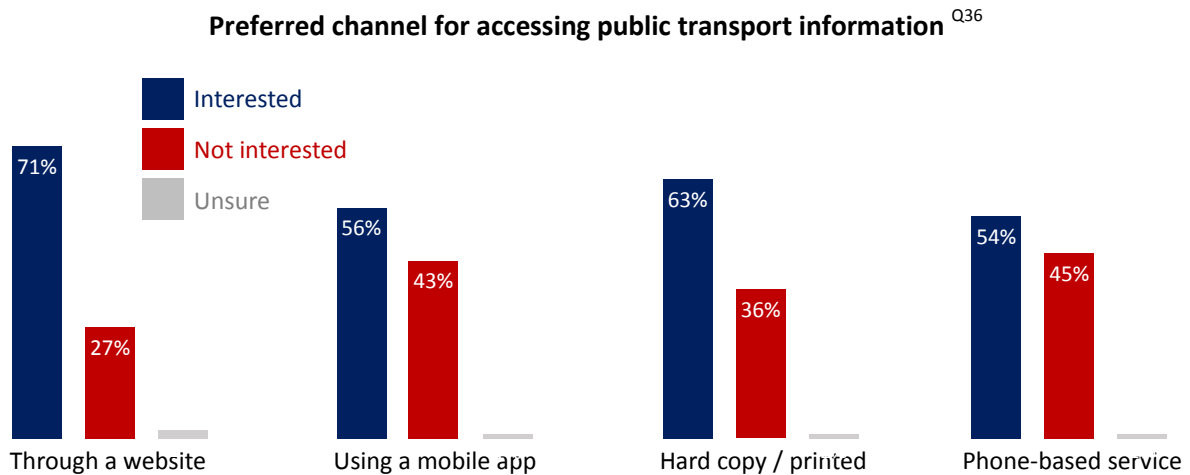
While region didn't have any relationship with booking preferences, there were however substantial variations between the general respondent group and the supplementary samples.

All four of the supplementary samples (made up of the additional interviews plus those from the main sample who fitted each criteria) had a strong preference for using telephone-based services to book an on-demand bus service – a profile which matched those of older respondents in the main sample.

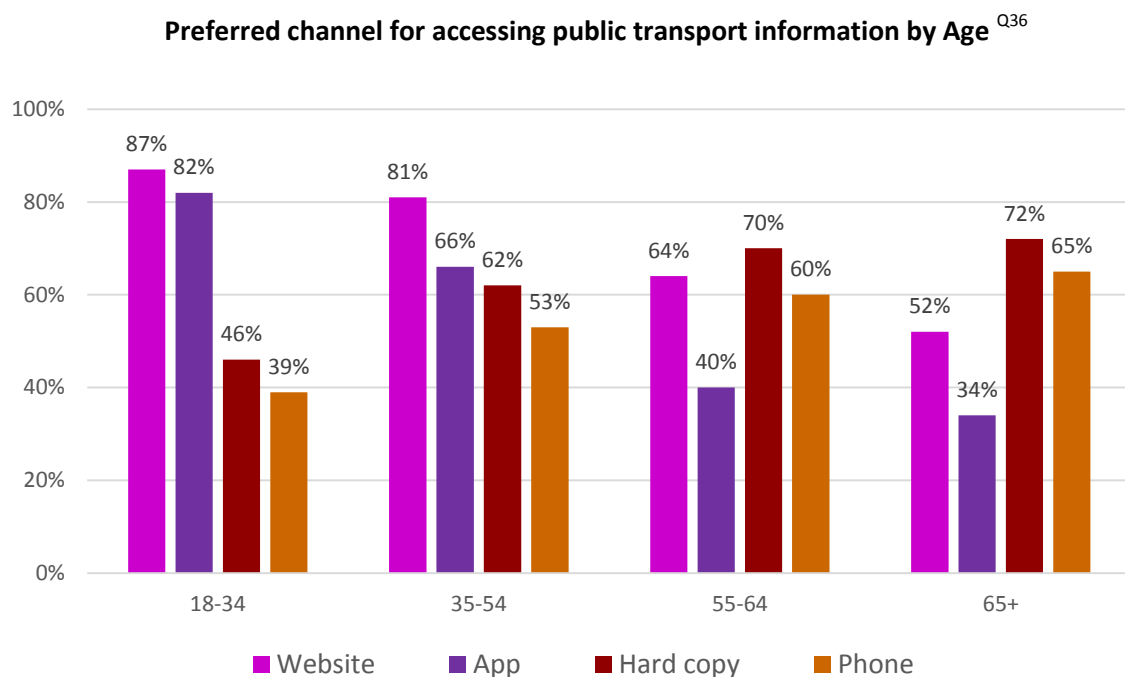


### Information Sources

There was strong interest from respondents for being able to access information in a wide variety of channels. Overall, the website concept had the greatest level of interest (71%), but all of the four channels were over 50% at the total respondent population level.



Drilling down into sub-groups revealed more nuanced preferences, but still broad interest from all groups in all channels. Unsurprisingly, younger people had much more interest in digital channels, while older people had more interest in hard copy and phone. Interestingly though, it was interest in using a mobile app rather than a website that dropped off most sharply amongst the older age groups.

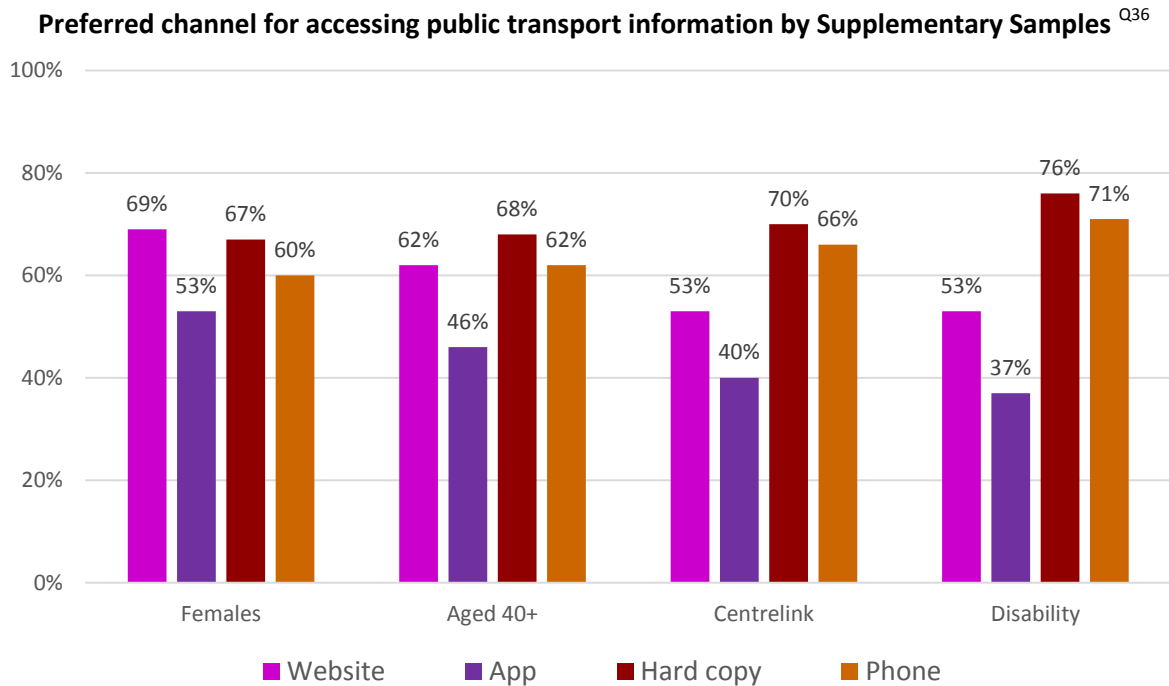


Sample sizes –18-34 n=140; 35-54 n=189-190; 55-64 n=110-112; 65+ n=161-167



## Supplementary Sample Results

The four supplementary samples also showed a relatively stronger interest in non-digital channels for accessing information, with interest in a mobile app the lowest of all channels.



Sample sizes – Females n=551; Aged 40+ n=770; Centrelink benefits n=384; Disability n=169

## Appendix A: Questionnaire



## Introduction

Good [morning/ afternoon/ evening], my name is [INTERVIEWER NAME].

I am calling from ORIMA Research, an independent social research company, on behalf of a NSW government agency. My company has been asked to conduct a 10-15 minute survey to inform decision-making about future regional and rural transport services .

May I please speak to the youngest adult (aged 18+) currently at home in your household?

IF NECESSARY: If you need some assistance to give this feedback it is OK to have a family member, friend or carer to assist you.

REPEAT ABOVE INTRO IF RESPONDENT IS ANOTHER PERSON.

Participation in this research is voluntary. You can choose not to answer any question and you can decide to stop participating in the interview at any time.

What you tell me during the research will be treated as private, confidential and anonymous. Your answers will only be used for the purposes of the research.

At any time during or after the interview, you can ask for your answers to not be used by ORIMA Research.

**IF RESPONDENT ASKS TO REMAIN ANONYMOUS OR USE A PSEUDONYM:** You may [REMAIN ANONYMOUS/USE A PSEUDONYM] if you would like to. This will not affect the information you provide.

**IF THE INTERVIEW WILL BE RECORDED/OBSERVED:** Our call may be recorded or monitored for quality assurance/training purposes. Is this OK with you?

**OBTAIN CONSENT BY ASKING:** Are you happy to proceed with the interview?

### **INTERVIEWER NOTES (TO APPEAR ON ALL SCREENS IN CASE ASKED BY RESPONDENT):**

- Local bus within your region means a bus which has a fixed route and timetable.
- Community Transport is the door to door transport provided by a council or community group for people with special transport needs or who lack access to a private vehicle for trips that would be difficult to take by public transport. A charge generally applies.
- Courtesy Transport is transport provided by pubs/clubs or community organisations (e.g. Lions, Rotary and churches) which is free of charge.

Firstly, I have a few questions about you to make sure that you are part of the group of people that we need to talk to. The information you provide will be grouped with other people – we won't ever reveal your identify in our reporting.

## Demographic screening questions (main and supplementary samples)

1. RECORD GENDER: [Interviewer note: do not ask this question – interviewer to complete]

- 1 Female
- 2 Male

2. What is your age? [SR]

- |            |           |                      |
|------------|-----------|----------------------|
| 1 Under 18 | TERMINATE | 9 50-54 years        |
| 2 18-19    |           | 10 55-59 years       |
| 3 20-24    |           | 11 60-64 years       |
| 4 25-29    |           | 12 65-69 years       |
| 5 30-34    |           | 13 70-74 years       |
| 6 35-39    |           | 14 75-79 years       |
| 7 40-44    |           | 15 80 years and over |
| 8 45-49    |           |                      |

3. What is the postcode of where you live? [SR]

- 1 [Please specify]

*IF POSTCODE DOESN'T FIT WITHIN LGA BOUNDARIES/QUOTAS, THANK AND TERMINATE*

.....

- 2 Unsure [DO NOT READ OUT]
- 3 Refuse [DO NOT READ OUT]

*TERMINATE*

*TERMINATE*

4. [ASK ALL] Do you live...? [READ OUT] [SR]

- 1 In a major regional centre
- 2 In a smaller town
- 3 In a rural or remote location
- 4 Refused [DO NOT READ OUT]

**TERMINATE**

5. **IF Q4=1:** Which major regional centre do you live in? **IF Q4=2-3:** What is the closest major regional centre to where you live? [SHOW ONLY AREAS FOR THE REGION MATCHED WITH THEIR POSTCODE] [DO NOT READ OUT][SR].

REGION	AREAS	REGION	AREAS
<b>Central West</b>	1 Bathurst	<b>Western region</b>	21 Broken Hill,
	2 Cowra		22 Bourke
	3 Dubbo		23 Cobar
	4 Lithgow		24 Coonamble
	5 Mudgee		
	6 Orange		26 OTHER (SPECIFY)
	7 Parkes		<b>New England Region</b> 27 Armidale
<b>Murray-Murrumbidgee region</b>	9 OTHER (SPECIFY)	28 Gunnedah	
	10 Albury	29 Moree,	
	11 Griffith	30 Narrabri	
	12 Wagga Wagga		
	14 OTHER (SPECIFY)	<b>Mid North Coast region</b> 31 Tamworth	
<b>Northern Rivers Region</b>	15 Ballina	33 OTHER (SPECIFY)	
	16 Casino	34 Coffs Harbour	
	17 Lismore	35 Grafton	
	18 Tweed	36 Port Macquarie	
	20 OTHER (SPECIFY)	37 Taree	
		39 OTHER (SPECIFY)	

6. [ASK ALL] Approximately how far do you live from the centre of [INSERT ANSWER FROM Q5]? [READ OUT] [SR]

- 1 Less than 5km
- 2 5km to less than 10km
- 3 10km to less than 20km
- 4 20km to less than 50 km
- 5 More than 50km
- 6 Don't know/unsure (DO NOT READ OUT)
- 7 Refused (DO NOT READ OUT)

7. Do you receive any Centrelink or DVA benefits? [SR]

- 1 Yes

CONTINUE FOR MAIN SAMPLE  
QUALIFIES FOR BENEFITS SUPPLEMENTARY SAMPLE

- |   |                              |   |
|---|------------------------------|---|
| 2 | No                           | CONTINUE FOR MAIN SAMPLE AND OTHER SUPPLEMENTARY SEGMENTS |
| 3 | Don't know (DO NOT READ OUT) | CONTINUE FOR MAIN SAMPLE AND OTHER SUPPLEMENTARY SEGMENTS |
| 4 | Refused (DO NOT READ OUT)    | CONTINUE FOR MAIN SAMPLE AND OTHER SUPPLEMENTARY SEGMENTS |
8. Do you have a disability, including any physical, intellectual/learning or sensory disabilities or mental illness? [SR]
- |   |                              |   |
|---|------------------------------|---|
| 1 | Yes                          | CONTINUE FOR MAIN SAMPLE<br>QUALIFIES FOR DISABLED SUPPLEMENTARY SAMPLE |
| 2 | No                           | CONTINUE FOR MAIN SAMPLE AND OTHER SUPPLEMENTARY SEGMENTS               |
| 3 | Don't know (DO NOT READ OUT) | CONTINUE FOR MAIN SAMPLE AND OTHER SUPPLEMENTARY SEGMENTS               |
| 4 | Refused (DO NOT READ OUT)    | CONTINUE FOR MAIN SAMPLE AND OTHER SUPPLEMENTARY SEGMENTS               |

### Current transport usage in their regional area [TOTAL SAMPLE]

9. In the last six months, which of these forms of transport have you used to get around within your regional area? [READ OUT] [MR] [ROTATE, BUT ALWAYS SHOW COMMUNITY TRANSPORT BEFORE COURTESY TRANSPORT]
- 1 Private vehicle (e.g. car, motorcycle or truck)
  - 2 Local bus within your region. By this we mean a bus which has a fixed route and timetable.
  - 3 Community Transport. This is the door to door transport provided by a council or community group for people with special transport needs or who lack access to a private vehicle for trips that would be difficult to take by public transport. A charge generally applies.
  - 4 Courtesy Transport. This is transport provided by pubs/clubs or community organisations (eg, Lions, Rotary and churches) which is free of charge.
  - 5 Taxi
  - 6 Ride share (e.g. UberX, Ridesurfing)
  - 7 Car share (e.g. GoGet, GreenShareCar)
  - 8 Hire Cars
  - 9 None of the above SKIP NEXT QUESTION
10. [FOR EACH TRANSPORT MODE SELECTED AT PREVIOUS QUESTION] In the last six months, how frequently have you used [INSERT TRANSPORT MODE] to get around within your regional area? [SR PER MODE] [READ OUT MODES] [ROTATE, BUT ALWAYS SHOW COMMUNITY TRANSPORT BEFORE COURTESY TRANSPORT]

		5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Don't know/can't say
A	Private vehicle	1	2	3	4	5	6	7	8	9
B	Local bus within your region	1	2	3	4	5	6	7	8	9
C	Community transport.	1	2	3	4	5	6	7	8	9
d	Courtesy transport	1	2	3	4	5	6	7	8	9
e	Taxi	1	2	3	4	5	6	7	8	9
F	Ride share (e.g. UberX, Ridesurfing)	1	2	3	4	5	6	7	8	9
g	Car share (e.g. GoGet, GreenShareCar)	1	2	3	4	5	6	7	8	9
H	Hire Cars	1	2	3	4	5	6	7	8	9

**IF QUALIFY FOR MORE THAN ONE USAGE MODULE (C, D, E, F), ROTATE ORDER IN WHICH MODULE SHOWN ACROSS SAMPLE BUT ALWAYS SHOW MODULE D (COMMUNITY TRANSPORT) BEFORE MODULE F (COURTESY TRANSPORT).**

### Local bus usage [BUS USERS AT Q9 ONLY]

We'd like to ask you about your usage of local buses which have a fixed route within your region and a fixed timetable. This does not include 'Community Transport' OR courtesy transport buses.

11. In the last six months, how often, if at all, have you used local buses for each of the following types of journeys? [READ OUT JOURNEY TYPES] [SR PER ROW]

		5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Haven't used in last 6 months	Don't know/can't say
A	Medical reasons (e.g. appointments)	1	2	3	4	5	6	7	8	9	10
B	Work or business	1	2	3	4	5	6	7	8	9	10
C	Shopping	1	2	3	4	5	6	7	8	9	10
d	Social or recreation	1	2	3	4	5	6	7	8	9	10
e	Education	1	2	3	4	5	6	7	8	9	10

11F(i). In the last 6 months, are there any other types of journeys you've used the local buses for?

1 Yes

SPECIFY Other:

2

[IF THEY SAY 'HAVEN'T USED IN THE LAST 6 MONTHS' AT ALL OF Q11A-E, AND NO AT Q11F(i), SHOW INTERVIEWER ALERT TO ASK THEM TO REVIEW THEIR RESPONSES AS THEY HAVE PREVIOUSLY INDICATED THEY HAVE USED THIS MODE IN PAST 6 MONTHS]

No

OTHERWISE, SKIP NEXT QUESTION

11F(ii). And in the last 6 months, how often have you used local buses for that [THE ABOVE OTHER SPECIFIED REASON MENTIONED]?

		5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Don't know/can't say
F(ii)	Other types of journeys	1	2	3	4	5	6	7	8	9

Now we'd like to focus on your most recent journey by a local bus.

12. For your most recent local bus journey, what was the purpose(s) of your journey? Was the journey for...? [READ OUT] [MR]
- 1 Medical reasons (e.g. appointments)
  - 2 Work or business
  - 3 Shopping
  - 4 Social or recreation
  - 5 Education
  - 6 Other (PLEASE SPECIFY)
  - 7 Don't know/unsure/ can't remember (DO NOT READ OUT)
  - 8 Refused (DO NOT READ OUT)
13. For your most recent local bus journey, did you use a Regional Excursion Daily (also known as RED) ticket? [SR]
- |   |                    |
|---|--------------------|
| 1 Yes   | SKIP NEXT QUESTION |
| 2 No  | ASK NEXT QUESTION  |
| 3 Don't know/unsure/ can't remember (DO NOT READ OUT) | ASK NEXT QUESTION  |
| 4 Refused (DO NOT READ OUT)                           | ASK NEXT QUESTION  |
14. For your most recent local bus journey, what was the one-way fare? [IF NEEDED:] If you're unsure, please provide an estimate. [SR] [READ OUT RESPONSE OPTIONS IF NEEDED]
- 1 Nothing, it was free
  - 2 Less than \$2
  - 3 \$2 to less than \$5
  - 4 \$5 to less than \$10
  - 5 \$10 to less than \$20
  - 6 \$20 or more
  - 7 Don't know/unsure/ can't remember (DO NOT READ OUT)
  - 8 Refused (DO NOT READ OUT)
15. For your most recent local bus journey, how full was the bus? [READ OUT] [SR]
- 1 I was the only passenger
  - 2 Less than half full
  - 3 About half full
  - 4 More than half full, but not full
  - 5 Full
  - 6 Don't know/unsure/can't remember (DO NOT READ OUT)
  - 7 Refused (DO NOT READ OUT)
16. For your most recent local bus journey, did the fare you paid feel reasonable value for money? [SR]
- 1 Yes
  - 2 No
  - 3 Don't know/unsure/can't remember (DO NOT READ OUT)
  - 4 Refused (DO NOT READ OUT)

### Community transport usage [COMMUNITY TRANSPORT USERS AT Q9 ONLY]

We'd like to ask you about your usage of Community Transport within your region. By this, we mean the door to door transport provided by a council or community group for people with special transport needs or who lack access to a private vehicle for trips that would be difficult to take by public transport. A charge generally applies. We are not referring to courtesy buses provided by pubs/clubs or community organisations (e.g. Lions, Rotary and churches) which are free of charge.

17. In the last six months, how often, if at all, have you used Community Transport buses or cars for each of the following types of journeys? [READ OUT JOURNEY TYPES] [SR PER ROW]

		5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Haven't used in last 6 months	Don't know/can't say
A	Medical reasons (e.g. appointments)	1	2	3	4	5	6	7	8	9	10
B	Work or business	1	2	3	4	5	6	7	8	9	10
C	Shopping	1	2	3	4	5	6	7	8	9	10
d	Social or recreation	1	2	3	4	5	6	7	8	9	10
e	Education	1	2	3	4	5	6	7	8	9	10

17F(i). In the last 6 months, are there any other types of journeys you've used Community Transport for?

1 Yes

SPECIFY Other:

2

[IF THEY SAY 'HAVEN'T USED IN THE LAST 6 MONTHS' AT ALL OF Q17A-E, AND NO AT Q17F(i), SHOW INTERVIEWER ALERT TO ASK THEM TO REVIEW THEIR RESPONSES AS THEY HAVE PREVIOUSLY INDICATED THEY HAVE USED THIS MODE IN PAST 6 MONTHS] OTHERWISE, SKIP NEXT QUESTION

No

17F(ii). And in the last 6 months, how often have you used Community Transport for that [THE ABOVE OTHER SPECIFIED REASON MENTIONED]?

		5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Don't know/can't say
F(ii)	Other types of journeys (PLEASE SPECIFY)	1	2	3	4	5	6	7	8	9

Now we'd like to focus on your most recent journey by Community Transport.



18. For your most recent Community Transport journey, what was the purpose(s) of your journey? Was the journey for...? [READ OUT] [MR]
- 1 Medical reasons (e.g. appointments)
  - 2 Work or business
  - 3 Shopping
  - 4 Social or recreation
  - 5 Education
  - 6 Other (PLEASE SPECIFY)
  - 7 Don't know/unsure/ can't remember (DO NOT READ OUT)
  - 8 Refused (DO NOT READ OUT)
19. For your most recent Community Transport journey, what fare did you pay for one-way? [SR] If you're unsure, please provide an estimate. [SR] [IF NECESSARY, PROMPT BY READING OUT RESPONSE OPTIONS]
- 1 Nothing, it was free
  - 2 Less than \$2
  - 3 \$2 to less than \$5
  - 4 \$5 to less than \$10
  - 5 \$10 to less than \$20
  - 6 \$20 or more
  - 7 Don't know/unsure/ can't remember (DO NOT READ OUT)
  - 8 Refused (DO NOT READ OUT)
20. For your most recent Community Transport journey, how full was the bus, van or car? [READ OUT] [SR]
- 1 I was the only passenger
  - 2 Less than half full
  - 3 About half full
  - 4 More than half full, but not full
  - 5 Full
  - 6 Don't know/unsure/can't remember (DO NOT READ OUT)
  - 7 Refused (DO NOT READ OUT)
21. For your most recent Community Transport journey, did the fare you paid feel reasonable value for money? [SR]
- 1 Yes
  - 2 No
  - 3 Don't know/unsure/can't remember (DO NOT READ OUT)
  - 4 Refused (DO NOT READ OUT)

## Taxi usage [TAXI USERS AT Q9 ONLY]

We'd like to ask you about your usage of local taxis within your region.

22. In the last six months, how often, if at all, have you used taxis for each of the following types of journeys? [READ OUT JOURNEY TYPES] [SR PER ROW]

	5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Haven't used in the last 6 months	Don't know/can't say
A Medical reasons (e.g. appointments)	1	2	3	4	5	6	7	8	9	10
B Work or business	1	2	3	4	5	6	7	8	9	10
C Shopping	1	2	3	4	5	6	7	8	9	10
d Social or recreation	1	2	3	4	5	6	7	8	9	10
e Education	1	2	3	4	5	6	7	8	9	10

22F(i). In the last 6 months, are there any other types of journeys you've used taxis for?

- 1 Yes      **SPECIFY Other:**  
 2      [IF THEY SAY 'HAVEN'T USED IN THE LAST 6 MONTHS' AT ALL OF Q22A-E, AND NO AT Q22F(i), SHOW INTERVIEWER ALERT TO ASK THEM TO REVIEW THEIR RESPONSES AS THEY HAVE PREVIOUSLY INDICATED THEY HAVE USED THIS MODE IN PAST 6 MONTHS]  
 No      OTHERWISE, SKIP NEXT QUESTION

22F(ii). And in the last 6 months, how often, have you used taxis for that [THE ABOVE OTHER SPECIFIED REASON MENTIONED]?

	5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Don't know/can't say
F(ii) Other types of journeys (PLEASE SPECIFY)	1	2	3	4	5	6	7	8	9

Now we'd like to focus on your most recent journey by taxi.

23. For your most recent taxi journey, what was the purpose(s) of your journey? Was the journey for...? [READ OUT] [MR]

- 1 Medical reasons (e.g. appointments)
- 2 Work or business
- 3 Shopping
- 4 Social or recreation
- 5 Education
- 6 Other (PLEASE SPECIFY)
- 7 Don't know/unsure/ can't remember (DO NOT READ OUT)
- 8 Refused (DO NOT READ OUT)

24. For your most recent local taxi journey, what was the one-way fare? [SR] [IF NEEDED:] If you're unsure, please provide an estimate. [READ OUT RESPONSE OPTIONS IF NEEDED]

- 1 Less than \$5
- 2 \$5 to less than \$10
- 3 \$10 to less than \$20
- 4 \$20 to less than \$30
- 5 \$30 to less than \$40
- 6 \$40 or more
- 7 Don't know/unsure/ can't remember
- 8 Refused

25. For your most recent taxi journey, did the fare you paid feel reasonable value for money? [SR]

- 1 Yes
- 2 No
- 3 Don't know/unsure/can't remember [DO NOT READ OUT]
- 4 Refused [DO NOT READ OUT]

**Courtesy transport usage [COURTESY TRANSPORT USERS AT Q9 ONLY]**

We'd like to ask you about your usage of courtesy transport. By this, we mean transport provided by pubs/clubs or community organisations (e.g. Lions, Rotary and churches) which is free of charge.

26. In the last six months, how often, if at all, have you used Courtesy Transport for each of the following types of journeys? [READ OUT JOURNEY TYPES] [SR PER ROW]

	5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Haven't used in the last 6 months	Don't know/can't say
A Medical reasons (e.g. appointments)	1	2	3	4	5	6	7	8	9	10
B Work or business	1	2	3	4	5	6	7	8	9	10
C Shopping	1	2	3	4	5	6	7	8	9	10
d Social or recreation	1	2	3	4	5	6	7	8	9	10
e Education	1	2	3	4	5	6	7	8	9	10

26F(i). In the last 6 months, are there any other types of journeys you've used courtesy transport for?

- 1 Yes      **SPECIFY Other:**
- 2      [IF THEY SAY 'HAVEN'T USED IN THE LAST 6 MONTHS' AT ALL OF Q26A-E, AND NO AT Q26F(i), SHOW INTERVIEWER ALERT TO ASK THEM TO REVIEW THEIR RESPONSES AS THEY HAVE PREVIOUSLY INDICATED THEY HAVE USED THIS MODE IN PAST 6 MONTHS]
- No      OTHERWISE, SKIP NEXT QUESTION

26F(ii). And in the last 6 months, how often have you used courtesy transport for that [THE ABOVE OTHER SPECIFIED REASON MENTIONED]?

	5 or more times per week	4 times per week	2-3 times a week	Once a week	Once every 2 weeks	Once every month	Once every few months	Less often	Don't know/can't say
F(ii) Other types of journeys (PLEASE SPECIFY)	1	2	3	4	5	6	7	8	9

Now we'd like to focus on your most recent journey by courtesy transport.

**27.** For your most recent courtesy transport journey, what was the purpose(s) of your journey? Was the journey for...? [READ OUT] [MR]

- 1 Medical reasons (e.g. appointments)
- 2 Work or business
- 3 Shopping
- 4 Social or recreation
- 5 Education
- 6 Other (PLEASE SPECIFY)
- 7 Don't know/unsure/ can't remember (DO NOT READ OUT)
- 8 Refused (DO NOT READ OUT)

### Satisfaction with current transport services [TOTAL SAMPLE]

28a. Which of the following transport services exist in your local region? [SR PER ROW] [ROTATE, BUT ALWAYS SHOW COMMUNITY TRANSPORT BEFORE COURTESY TRANSPORT]

	Yes	No	Don't know
(i) Local buses within your region	1	2	3
(ii) Community transport	1	2	3
(iii) Courtesy transport	1	2	3
(iv) Taxis	1	2	3

28b. On a scale from 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the following transport services in your local region [IF ANY CODES 2 AT Q28a, INSERT whether or not they exist in your region]? Even if you don't use that type of transport, we would like to know your impressions. [READ OUT] [SR PER ROW] [ROTATE, BUT ALWAYS SHOW COMMUNITY TRANSPORT BEFORE COURTESY TRANSPORT]

[INTERVIEWER NOTE: IF TRANSPORT MODE NOT AVAILABLE IN THEIR LOCAL REGION, STILL ENCOURAGE RESPONDENT TO GIVE A SATISFACTION RATING. IF NEED BE, CODE AS 'NOT APPLICABLE'].

	Very dissatisfied	Dissatisfied	Neither satisfies or dissatisfied	Satisfied	Very satisfied	Don't know	Not applicable
1 Local buses within your region.	1	2	3	4	5	6	7
2 [IF 'YES' AT Q28A] Community Transport (the door to door transport provided by a council or community group for people with special transport needs or who lack access to a private vehicle for trips that would be difficult to take by public transport. A charge generally applies.)	1	2	3	4	5	6	7
3 Courtesy transport (e.g. provided by pubs/clubs or community organisations such as Lions, Rotary and churches)	1	2	3	4	5	6	7
4 Taxis	1	2	3	4	5	6	7

[IF Q28a(i)= CODE 2, AUTO-CODE ALL STATEMENTS AT Q29 AS CODE 7]

29. Now I'd like you to focus just on local buses within your region. On a scale from 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the following aspects of the local bus services in your region? Even if you don't use local buses, we would like to know your impressions. [READ OUT] [SR PER ROW] [ROTATE, BUT ALWAYS ASK STATEMENT 2 IMMEDIATELY AFTER STATEMENT 1] [IF Q28a(i)= CODE 1, DO NOT SHOW CODE 7]

		Very dissatisfi ed	Dissatisf ied	Neither satisfies or dissatisfi ed	Satisfied	Very satisfied	Don't know/no experienc e	Not applicable /no buses exist
1	How far you need to walk to get to your nearest bus stop	1	2	3	4	5	6	7
2	The actual bus stop (whether it is covered when raining or hot, if it has a clean seat, whether it's in a safe location)	1	2	3	4	5	6	7
3	Service from the driver (whether the driver is polite, friendly, helpful, and knows me and my needs)	1	2	3	4	5	6	7
4	Availability (whether the service runs when and where I need it)	1	2	3	4	5	6	7
5	Reliability (whether the bus turns up on time)	1	2	3	4	5	6	7
6	The vehicle (such as the ease of getting in/out, cleanliness, comfort, and whether seats and seatbelts available)	1	2	3	4	5	6	7
7	Safety (whether you feel safe in the vehicle during the journey)	1	2	3	4	5	6	7
8	How reasonable travel times are to get to where you are going	1	2	3	4	5	6	7

### PRICE SENSITIVITY [TOTAL SAMPLE]

I'd like you to still focus on local bus journeys.

I'd like you to now imagine a new bus service that you can pre-book and provides more flexibility in terms of when and where you get can picked up and dropped off. It could pick you up, plus other passengers along the way, and drop you off at any location that you request, including your own home. Thinking about this new type of bus service... [SR PER ROW]

30. On a scale from 0 to 10 where 0 means *not at all willing* and 10 means *completely willing*, how willing would you be to pay \$10 more than the current fare for the most similar bus journey? [SR]
31. How willing would you be to pay \$5 more than the current fare for the most similar bus journey? [SR]
32. How willing would you be to pay \$2 more than the current fare for the most similar bus journey? [SR]

[RANDOMISE ORDER. HALF OF EACH REGION TO BE SHOWN 30, 31, 32 AND HALF TO BE SHOWN 32,31,30.]

		Not at all willing										Completely willing	Don't know	N/A
A	\$10 more	0	1	2	3	4	5	6	7	8	9	10	11	12
B	\$5 more	0	1	2	3	4	5	6	7	8	9	10	11	12
C	\$2 more	0	1	2	3	4	5	6	7	8	9	10	11	12

### UNMET NEEDS AND MOTIVATORS TO ON-DEMAND SERVICE USAGE [TOTAL SAMPLE]

33. Provided you feel the fare is reasonable, how likely would you be to use a more flexible bus service like the one I just described to you? Would you be... [READ OUT]? [SR]

A	Very likely	1
B	Quite Likely	2
C	Not very likely	3
D	Not at all likely	4
E	Unsure/don't know [DON'T READ OUT]	5

34. This more flexible bus service could enable you to pre-book a seat. If you were to use this



service, would you like to be able to book a seat... [READ OUT] [SR FOR EACH ROW]

	Yes	No	Unsure/Don't know	Not applicable
A Through a website	1	2	3	4
B Using an App for mobile devices (including smart phones, tablets and ipads)	1	2	3	4
C Using a telephone-based booking service (including an option for the hearing impaired)	1	2	3	4

35. ASK IF SELECT MORE THAN ONE 'YES' AT PREVIOUS QUESTION: And which would be your most preferred way to book a seat? [READ OUT ONLY ANSWERS SELECTED IN PREVIOUS QUESTION]

A Through a website	1
B Using an App for mobile devices	2
C Using a telephone-based booking service	3

36. Which of the following information sources, if any, would you be interested in accessing for public transport information in your local area? [READ OUT] [ROTATE] [MR]

	Interested in using	Not interested in using	Unsure/don't know
a Website	1	2	3
b An App for mobile devices (including smart phones, tablets and ipads)	1	2	3
c Hard copy printed timetables	1	2	3
d Telephone-based information service (including an option for the hearing impaired)	1	2	3

37. I'm going to read out a list of potential transport changes. For each one, please tell me whether it would make you more or less likely to use local buses in your region than you do now, or whether it would make no difference. [SR PER ATTRIBUTE. IF MORE LIKELY, ASK: Is that *much* more likely, or just a *little* more likely? IF LESS LIKELY, ASK: Is that *much* less likely, or just a *little* less likely?]

		Much less likely	A little less likely	No difference	A little more likely	Much more likely	Unsure/ Don't know	Not applicable
1	Services are more available at non-peak times (e.g. nights and weekends)	1	2	3	4	5	6	7
2	More frequent services are provided	1	2	3	4	5	6	7
3	The pick-up and drop-off points are more convenient	1	2	3	4	5	6	7
4	The service can cater to my access needs (e.g. wheelchair accessible, takes strollers, has a baby capsule)	1	2	3	4	5	6	7
5	The driver can help me on/off the bus and walk me to my door	1	2	3	4	5	6	7
6	Enhanced security at the bus stop and on the bus	1	2	3	4	5	6	7
7	It's easier to get information about where to get on and off the bus	1	2	3	4	5	6	7
8	Bus services connect better to other transport services (e.g. trains)	1	2	3	4	5	6	7
9	The fares are lower	1	2	3	4	5	6	7
10	I can book the bus for the times I want to travel	1	2	3	4	5	6	7
11	I can ask the bus to travel to a specific destination (not just on a fixed bus route)	1	2	3	4	5	6	7

38. In the last six months, have there been any occasions when you tried to catch a bus to get around your local region, or considered trying to catch a bus, but you did not end up using a bus?

- 1 Yes
- 2 No
- 3 Can't recall

ASK IF ANSWERED YES TO PREVIOUS QUESTION

39. Please think back to the last time you tried or considered catching a bus but didn't. What did you do instead? Did you? [READ OUT] [SR]

- 1 Decide not to take the journey at all
- 2 Drove yourself or got a lift
- 3 Take a taxi
- 4 Use community transport
- 5 Use courtesy transport (IF REQUIRED: e.g. provided by pubs/clubs or community organisations such as Lions, Rotary and churches)
- 6 Use a car sharing service (GoGet, GreenShareCar)
- 7 Use a ridesharing service (UberX, Ridesurfing)
- 8 Used a hire car (with a driver)
- 9 Other [PLEASE SPECIFY]
- 10 Not applicable, I have not decided not to take a bus.

#### REST OF DEMOGRAPHICS [TOTAL SAMPLE]

40. Which of the following best describes your employment status? [READ OUT] [SR]

- 1 Employed in the public service
- 2 Employed in the private sector
- 3 Employed in the not-for-profit sector
- 4 Self-employed
- 5 Unemployed
- 6 Student
- 7 Retired
- 8 Home duties
- 9 Other *[Please specify]* \_\_\_\_\_

41. Do you identify as of Aboriginal and/ or Torres Strait Islander origin? [SR]

- 1 Yes, Aboriginal
- 2 Yes, Torres Strait Islander
- 3 Yes, both
- 4 No

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If you would like to discuss any aspect of the interview or the study, or the information you gave, please feel free to contact ORIMA Research on our toll free number 1800 654 585.

### Interviewer declaration

Please read the statement below and complete when the interview is complete.

1. I, (interviewer name) \_\_\_\_\_, declare that this interview has been completed in compliance with current ISO 20252 quality standards.
2. Date: \_\_\_\_\_

### DO NOT ASK OF RESPONDENTS: Client sign-off of final questionnaire

Please read the statement below and complete when appropriate.

1. I, (name) \_\_\_\_\_ from (organisation) \_\_\_\_\_, agree that the above questionnaire is final and ready to be programmed for the CATI format. I understand that any changes following sign-off of this version of the questionnaire may incur additional charges based on the relevant consultant's hourly charge rate.
2. Date: \_\_\_\_\_