Independent Pricing and Regulatory Tribunal of NSW

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

Contact: David Bruce
Phone: 02 6109 6300

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Melbourne Canberra Sydney Brisbane
www.orima.com

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Contents

Appendices

This research was conducted in accordance with our ISO20252 accreditation.

1. Executive Summary

The 2020 Rural and Regional Transport survey was conducted in July and August 2020 with 607 residents of six NSW regions, plus an additional 90 people with a disability and 90 who received Centrelink/DVA benefits. Along with women and people aged over 40, these groups are referred to as 'supplementary samples'. The survey was conducted by phone and took 15 minutes on average. The questionnaire for the 2020 survey was developed by The Behavioural Insights Team and based on the questionnaire from a similar survey in 2017. Because very little of the 2017 survey was retained in a comparable form, only the overall usage figures are directly compared to the previous results.

Usage

Usage of publicly accessible transport services in rural and regional areas of NSW remains at a steady but low level. 5% of respondents reported using local buses in the last six months, and 2% using an on-demand bus service. This is compared to 6% who reported using a bus in the 2017 equivalent survey. Reported use of both taxis (24% compared to 16%) and rideshare (8% compared to 1%) were higher than reported in 2017.

Use of buses did not vary significantly across supplementary demographic groups or by region. People with a disability reported higher use of taxis, and all supplementary samples reported somewhat higher use of community transport. By comparison, they tended to make less use of rideshare.

Factors affecting current choice of buses

There is a moderate level of willingness or interest in catching buses or using them more often.

Overall, nearly two-thirds of the current users (59%) agreed to at least some extent that they would like to catch buses more often, while nearly a third of non-users (30%) were at least willing to consider using buses to get around their regional area in the next six months. The 30% of non-users who are most willing to consider using buses are somewhat different to those who are less willing, and there were a number of specific drivers that may increase their likelihood to use buses.

Outside of availability of other options, convenience, safety and speed were the biggest considerations for the small group of bus users. For non-users, both those willing to use buses and those less so, convenience and speed were the two biggest considerations other than the availability of other options. Cost is the next biggest consideration for both groups, but somewhat lower than these more practical considerations.

Motivators for increasing use of buses

The willing non-users group expressed the highest level of potential impact from a range of influences tested. In particular, 80% of this group indicated that improvements in convenience and route availability might encourage them to start to use buses. These were also the two most likely influential approaches for current users and general non-users, but not to the same extent. On demand services, despite apparently offering these types of benefits, were rated as less appealing – suggesting that there may be a limited understanding of how on-demand services could benefit users.

Financial incentives were likely to be moderately influential, just slightly lower than an on-demand service.

On-demand bus services

Currently only 2% of respondents to the survey reported using an on-demand bus service, and there are too few such users to provide any meaningful feedback on reasons or experiences. Motivators to encourage use of an on-demand service are similar to local buses more generally – with speed / efficiency, and convenience in booking more appealing approaches than financial incentives.

All of the motivators tested for on-demand services are perhaps of slightly more appeal to people who currently do not use buses but who are willing to consider them, more so than even to current bus users – though of course existing behaviour suggests that translating this into use of the service may still be challenging.

The majority of survey respondents would expect to pay between $2 and $5 more for a trip using an on-demand bus service compared to a standard bus service. Non-users have somewhat higher expectations of how much more fares would be on an on-demand bus service compared to what current users would be willing to pay.

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 2017 IPART undertook a review to determine the maximum fares[1] 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. A telephone survey of nearly 1,000 people across six regional areas was developed and conducted to support this review. IPART determined that operators could charge a surcharge for these services of up to $5 on top of the standard bus fare.

In 2020 IPART is again reviewing maximum fares for regular and on-demand bus services across rural and regional NSW. IPART is undertaking a similar survey to provide up-to-date data on a number of areas of interest. The 2020 survey uses a near-identical *methodology* to the 2017 survey. The questionnaire *content* itself is somewhat different though, with the original 2017 questionnaire having been modified by The Behavioural Insights Team to a version adapted to suit current needs. In finalising the design of the 2020 questionnaire, priority was given to IPART's preferred current questions rather than comparability or consistency with 2017.

Because there are few elements of the 2020 questionnaire that are identical to the 2017 version, there are few direct comparisons included in this report.

B. Research objectives

The 2020 survey covers a range of topics:

1. Usage of a range of transport modes.
2. Detailed usage and satisfaction ratings for community transport, courtesy transport, taxis and on-demand bus services – limited to weekly users.
3. Detailed usage of local buses.
4. Reasons for using and not using local buses, including factors that may increase use of buses.
5. Factors that may affect use of on-demand bus services.

[1] Pensioner or student concession discount fares and the price/availability of Regional Excursion Daily tickets fell outside the scope of this determination.

The research investigated these issues amongst the general adult community and also specifically explored the views of four key 'supplementary' 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) in late July and early August 2020.

It should be noted that the survey was conducted while Australia and NSW were impacted by the COVID-19 pandemic, and it is possible that recent use of transport services could have been impacted by this circumstance, though the regional areas of NSW included in the survey were not heavily directly impacted at the time of the survey.

Approximately 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. A small number of questions were added after the pilot, and total sample sizes for these questions are slightly smaller. Sample sizes are noted throughout the report.

The survey was conducted in six geographic regions across NSW (defined identically to the 2017 survey):

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

Around half the surveys were conducted by landline using randomly generated numbers anticipated to be within the regional areas (defined by LGA boundary). The other half were conducted by mobile, using geographically targeted sample purchased from Australia's leading provider of research sample, Samplepages[2]. 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. This methodology was all identical to the 2017 survey, other than the split of landline to mobile numbers used in 2017, which used a 60:40 split rather than the 50:50 split used in 2020.

[2] 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.

A total of n=607 surveys were completed in the **main survey**, n=100-103 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 with a disability and who receive benefits were conducted in each of the six regions (ie: 30 additional surveys per region, or 90 additional surveys with each of these two groups). No additional surveys were conducted with people aged 40+ or with females were conducted, as there are adequate sub-samples for these groups captured within the main survey sample.

These additional 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 for each group.

The supplementary samples are always shown unweighted, for consistency with each other and with the 2017 survey.

The survey took an average of 15 minutes to complete. A total of 13,195 calls were made, with 3,915 resulting in a connection to a person. 20% of people contacted participated in the survey, and 46% 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 by IPART and reviewed for technical correctness only by ORIMA. 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.

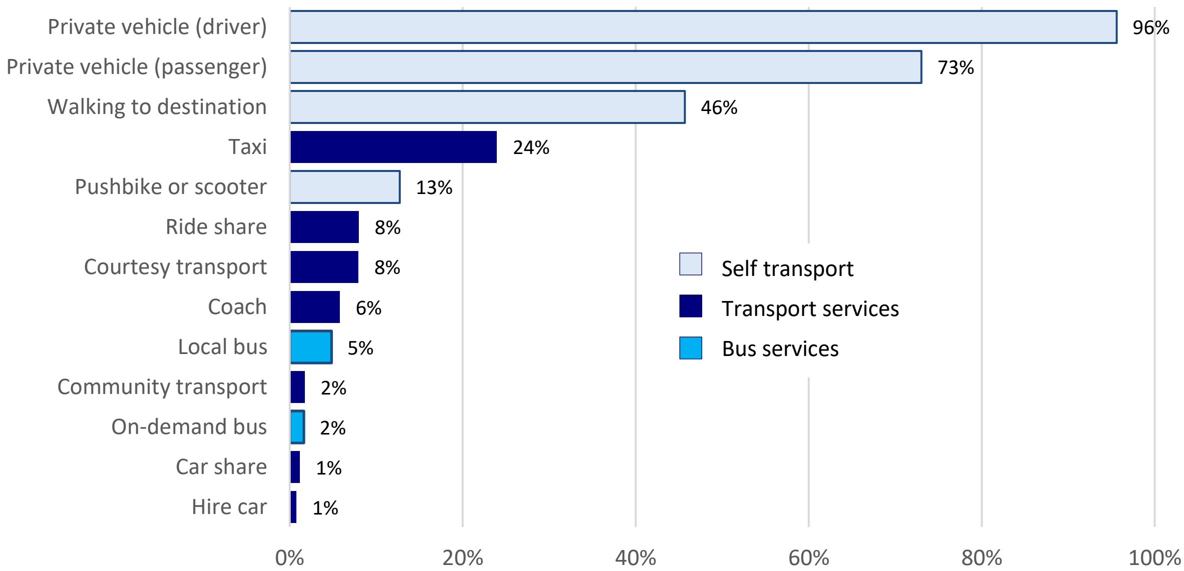
A copy of the 2020 questionnaire can be seen in Appendix A.

3. Main Survey Findings

A. Current transport usage in regional area

5% of the main survey sample reported having used a local bus within the last six months, compared to 6% reported in the 2017 survey. 2% reported having used an on-demand bus service. Use of both taxis (24% compared to 16%) and rideshare (8% compared to 1%) were higher than reported in 2017.

Modes of transport used within the last 6 months (Q11, n=607)



	Used	Central West	Murray-Murrum-bidgee	Northern Rivers	Far West	New England	Mid North Coast
Private vehicle (driver)	**96%**	94%	97%	95%	93%	97%	96%
Private vehicle (passenger)	**73%**	74%	70%	74%	70%	66%	79%
Walking to destination	**46%**	41%	50%	45%	40%	44%	48%
Taxi	**24%**	25%	21%	18%	20%	32%	26%
Pushbike or scooter	**13%**	5%*	14%	19%*	7%	8%	16%
Ride share	**8%**	6%	8%	8%	6%	14%	6%
Courtesy transport	**8%**	6%	9%	5%	6%	9%	10%
Coach	**6%**	14%*	2%*	3%*	3%	4%	6%
Local bus	**5%**	6%	6%	3%	3%	2%	6%
Community transport	**2%**	3%	2%	3%	1%	0%	1%
On-demand bus	**2%**	2%	3%	1%	1%	1%	1%
Car share	**1%**	2%	1%	1%	2%	2%	0%
Hire car	**1%**	1%	1%	2%	1%	0%	0%
Sample size	*607*	*100*	*102*	*102*	*100*	*103*	*100*

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

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 relatively minor variations, though more so than by region.

Of note, and in keeping with the 2017 survey, those on Centrelink benefits or with a disability reported less use of a private vehicle and slightly higher use of buses and community transport. Females reported lower use of courtesy transport and pushbikes / scooters; while those aged 40+ reported less use of rideshare.

Modes of transport used within the last 6 months (Q11)

	Total Main Sample	Females	Aged 40+	Centrelink Benefits	Disability
Private vehicle (driver)	**96%**	89%*	91%	84%*	77%*
Private vehicle (passenger)	**73%**	78%*	69%*	67%*	75%
Walking to destination	**46%**	41%	42%	43%	37%
Taxi	**24%**	20%	21%	23%	32%*
Pushbike or scooter	**13%**	7%*	10%	5%*	11%
Ride share	**8%**	4%	3%*	3%*	3%
Courtesy transport	**8%**	3%*	6%*	7%	5%
Coach	**6%**	6%	5%	7%	8%
Local bus	**5%**	6%	4%	6%	7%
Community transport	**2%**	4%*	4%*	6%*	7%*
On-demand bus	**2%**	3%*	2%	2%	1%
Car share	**1%**	1%	1%	1%	1%
Hire car	**1%**	0%	1%	1%	1%
Sample size (Supplementary Sample plus eligible main sample)	*607*	*420*	*618*	*334*	*150*

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

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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. The summary columns in the table below provides perhaps a more useful snapshot of the frequency of usage.

Frequency of using modes of transport within the last 6 months (Q11, n=607)

	5 or more days a week	2-4 days a week	Weekly	Less often	Don't use	At least weekly	Used in past 6 months
Private vehicle (driver)	58%	26%	5%	6%	5%	89%	**95%**
Private vehicle (passenger)	6%	23%	17%	27%	27%	46%	**73%**
Walking to destination	8%	16%	12%	10%	55%	35%	**45%**
Taxi	0%	<1%	2%	21%	76%	3%	**24%**
Pushbike or scooter	<1%	3%	3%	6%	87%	7%	**13%**
Ride share	<1%	0%	1%	7%	92%	1%	**8%**
Courtesy transport	0%	0%	1%	7%	92%	1%	**8%**
Coach	0%	0%	0%	6%	94%	0%	**6%**
Local bus	<1%	2%	<1%	2%	95%	3%	**5%**
Community transport	0%	<1%	<1%	1%	98%	<1%	**2%**
On-demand bus	0%	<1%	0%	2%	98%	<1%	**2%**
Car share	0%	<1%	0%	1%	99%	<1%	**1%**
Hire car	0%	0%	0%	<1%	99%	0%	**<1%**

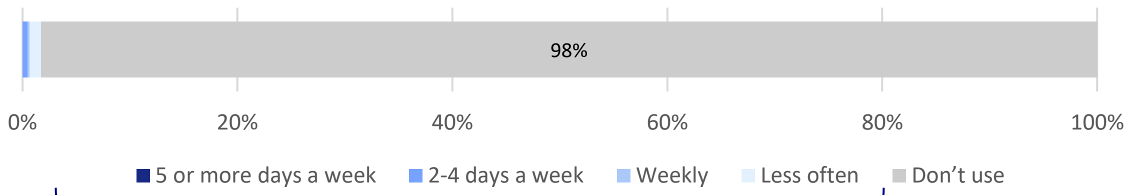
The following pages summarise usage of each form of transport, and include detailed feedback from respondents who use each form of transport at least weekly. To maximise the available sample size, all users from the main and supplementary samples are included in these summaries. Data is unweighted.

ⓘ Despite this, the samples of weekly users for some forms of transport are extremely small – in some cases as little as a single person – so the feedback on experiences must be treated with extreme caution.

Usage Summary:

Community Transport

Frequency of use



At least used in past 6 months: **2%** (n=10)

Central west	**3%**	Northern Rivers	**3%**	New England	**-%**
Murray-Murrumbidgee	**2%**	Western	**1%**	Mid North Coast	**1%**

Other key trends in use People who drove themselves 5+ times a week were less likely (0%) to use Community Transport than those who drove less frequently (4%)

Of those using Community Transport at least weekly: <**1%** (n=**4 people**)

ⓘ Please note that sample sizes in this section are very small, and results here should be interpreted with care.

Reasons	
Work	-
Education	14%
Medical	71%
Shopping	-
Social	14%
Connections	-

Rating (% good + % very good)	
Value for money	86%
Punctuality	100%
Journey time	100%
Cleanliness / customer service	100%
Safety	100%
Booking/payment ease	100%

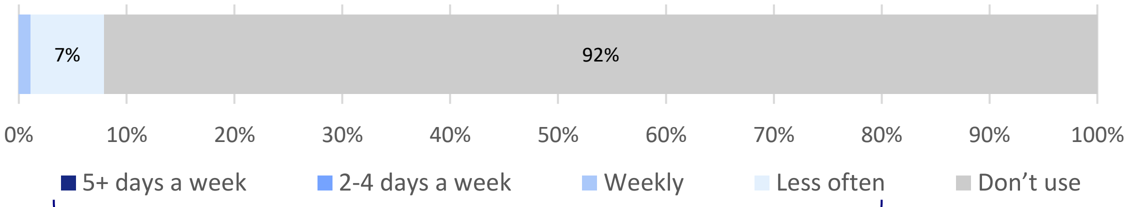
Overall satisfaction (% good + % very good) – **100%**

	Females	Age 40+	Centrelink	Disability
Sample size	*421*	*620*	*334*	*152*
Use (Past 6 months)	4%	4%	6%	7%
Use (Weekly)	1%	1%	2%	1%
Satisfaction	100%	100%	100%	100%

Usage Summary:

Courtesy Transport

Frequency of use



At least used in past 6 months: **8%** (n=43)

Central west	**6%**	Northern Rivers	**5%**	New England	**9%**
Murray-Murrumbidgee	**9%**	Western	**6%**	Mid North Coast	**10%**

Other key trends in use: Males more likely to use in past 6 months (13%), those aged 18-39 more likely to use less often (10%) than those aged 60+ (4%)

Of those using Courtesy Transport at least weekly: **1%** (n=**6 people**)

ⓘ Please note that sample sizes in this section are very small, and results here should be interpreted with care.

Reasons		**Rating (% good + % very good)**	
Work	-	Value for money	80%
Education	-	Punctuality	100%
Medical	-	Journey time	100%
Shopping	-	Cleanliness / customer service	100%
Social	100%	Safety	100%
Connections	33%	Booking/payment ease	100%

Overall satisfaction (% good + % very good) – **100%**

	Females	Age 40+	Centrelink	Disability
Sample size	*421*	*620*	*334*	*152*
Use (Past 6 months)	3%	6%	7%	5%
Use (Weekly)	<1%	<1%	<1%	-
Satisfaction	100%	100%	100%	100%

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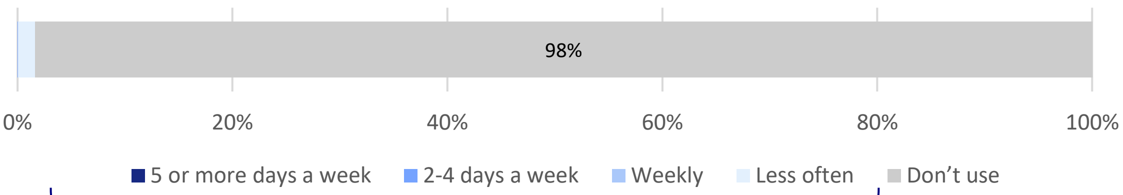
Usage Summary:

On Demand Buses

Frequency of use



At least used in past 6 months: **2%** (n=10)

Central west	**2%**	Northern Rivers	**1%**	New England	**1%**
Murray-Murrumbidgee	**3%**	Western	**1%**	Mid North Coast	**1%**

Other key trends in use: No evident trends in use from small number of cases

Of those using On Demand buses at least weekly: <**1%** (n=**1 person**)

ⓘ Please note that sample sizes in this section are very small, and results here should be interpreted with care.

Reasons		**Rating (% good + % very good)**	
Work	100%	Value for money	100%
Education	100%	Punctuality	100%
Medical	-	Journey time	100%
Shopping	-	Cleanliness / customer service	100%
Social	-	Safety	100%
Connections	-	Booking/payment ease	100%

Overall satisfaction (% good + % very good) – **100%**

	Females	Age 40+	Centrelink	Disability
Sample size	*421*	*620*	*334*	*152*
Use (Past 6 months)	3%	2%	-	-
Use (Weekly)	<1%	<1%	-	-
Satisfaction	100%	100%	-	-

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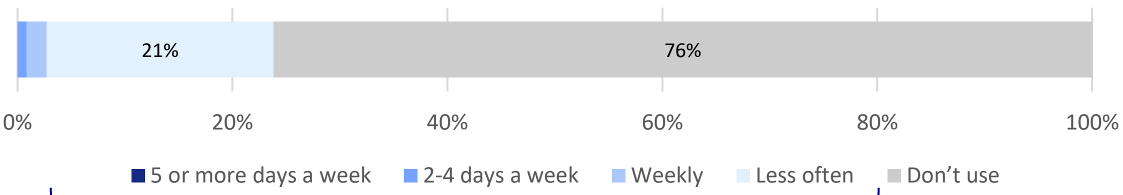
Usage Summary:

Taxis

Frequency of use



At least used in past 6 months: **24%** (n=136)

Central west	**25%**	Northern Rivers	**17%**	New England	**32%**
Murray-Murrumbidgee	**21%**	Western	**20%**	Mid North Coast	**26%**

Other key trends in use

Those aged 60+ were less likely to use taxis in the past 6 months (17%) than those aged 18-39 (31%) or 40-59 (26%). Taxi use in the past 6 months was higher for males (28%) than females (20%). Those who lived less than 5km from town were more likely to use taxis in the past 6 months (37%) than those over 10km away (14-19%).

Of those using taxis at least weekly: **3%** (n=**16 people**)

ⓘ Please note that sample sizes in this section are very small, and results here should be interpreted with care.

Reasons		**Rating (% good + % very good)**	
Work	10%	Value for money	60%
Education	5%	Punctuality	55%
Medical	67%	Journey time	85%
Shopping	67%	Cleanliness / customer service	95%
Social	71%	Safety	85%
Connections	14%	Booking/payment ease	70%

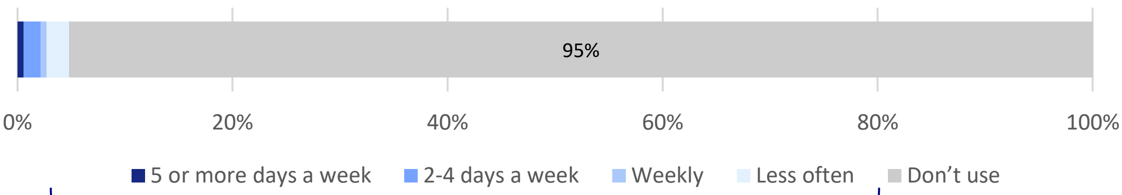
Overall satisfaction (% good + % very good) – **90%**

	Females	Age 40+	Centrelink	Disability
Sample size	*421*	*620*	*334*	*152*
Use (Past 6 months)	20%	21%	23%	**32%**
Use (Weekly)	3%	2%	**4%**	**6%**
Satisfaction	82%	93%	87%	75%

Usage Summary:

Buses

Frequency of use



At least used in past 6 months: **5%** (n=37)

Central west	**6%**	Northern Rivers	**3%**	New England	**2%**
Murray-Murrumbidgee	**6%**	Western	**3%**	Mid North Coast	**6%**

Other key trends in use

People aged 18-39 were more likely to use buses weekly (7%) or in the past 6 months (9%) than other age cohorts (1-4%). Those living less than 5km to town were less likely to use the bus on a weekly basis (2%) than those living between 5-9km (10%). Those who drove less than 5+ times a week were more likely to use the bus in the past 6 months (8%) and weekly (5%) than those who were regular drivers (1-2%).

Of those using buses at least in the **past 6 months**: **5%** (n=**37 people**)

ⓘ Please note that sample sizes in this section are very small, and results here should be interpreted with care.

Reasons		**Rating (% good + % very good)**
Work	21%	
Education	16%	
Medical	45%	Not asked
Shopping	61%	of bus users
Social	34%	
Connections	29%	

Overall satisfaction not asked to bus users

	Females	Age 40+	Centrelink	Disability
Sample size	*421*	*620*	*334*	*152*
Use (Past 6 months)	6%	4%	6%	7%
Use (Weekly)	2%	1%	2%	2%
Satisfaction	-	-	-	-

B. Buses

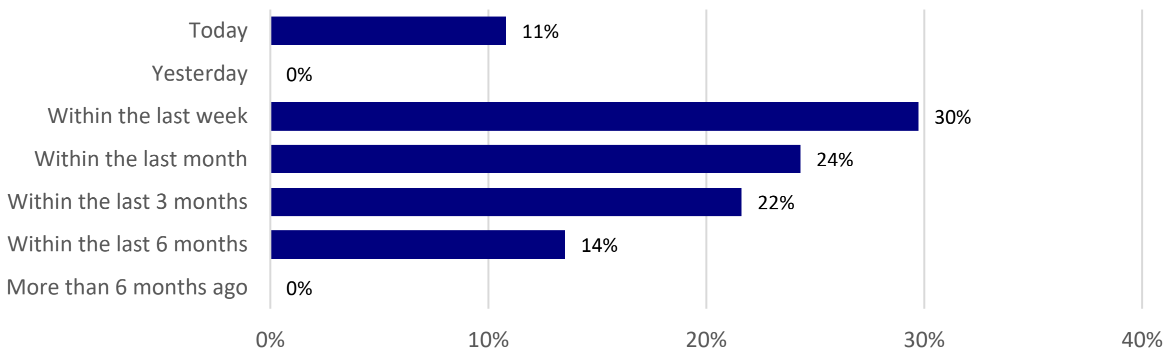
More detailed information about use and consideration of buses was obtained from both users and non-users. This section of the report looks at buses in particular. The number of actual users of buses in the survey is very small (just n=37 across both the main sample and the supplementary samples). As was the case in the 2017 survey, to maximise what can be extracted from the data, results for all bus users' surveys are aggregated together here and used in an unweighted form.

Most recent journey

ⓘ Please note that sample sizes in this section are very small, and results here should be interpreted with care.

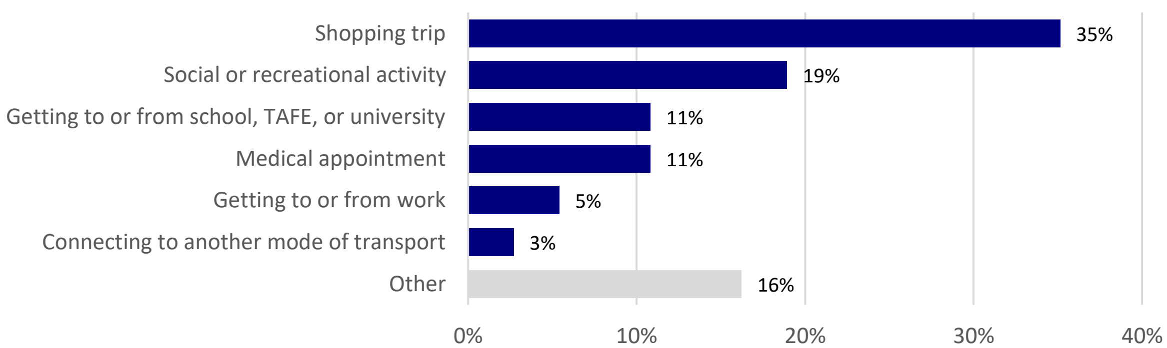
Of the 37 respondents who had used buses within the last six months, 41% had used a bus within the last week.

When was your most recent bus journey? (Q19, n=37)



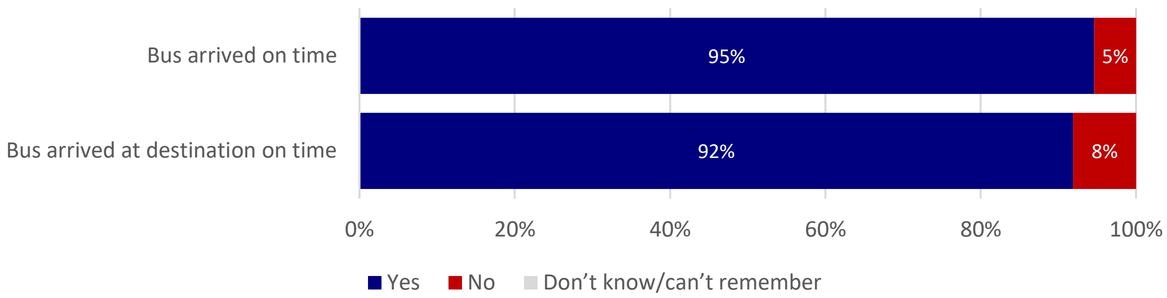
A third of the most recent trips were for shopping trips (35%), while another 19% involved social or recreational activities. Small numbers reported their last bus trip being for educational or work purposes.

What was the purpose of your most recent bus journey? (Q20, n=37)



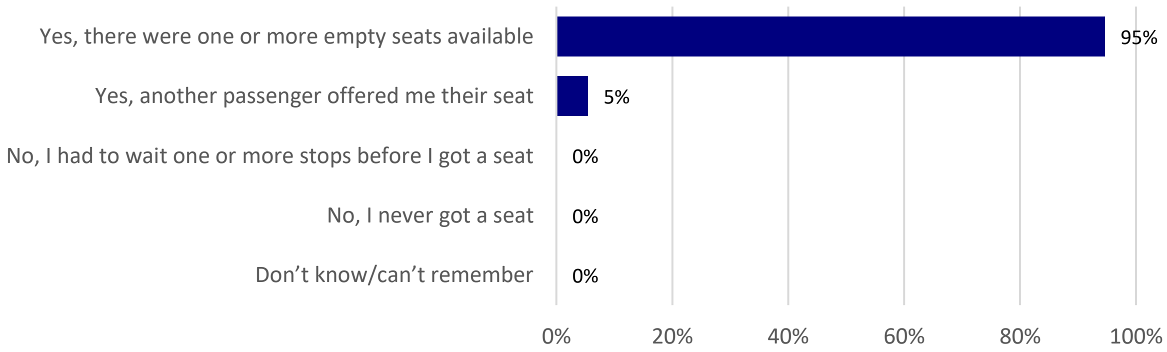
Users reported high levels of timeliness, both in terms of arriving on time (95%) and getting them to their destination on time (92%).

On your most recent bus journey, did the bus arrive on time / arrive at your destination on time? (Q21, n=37)



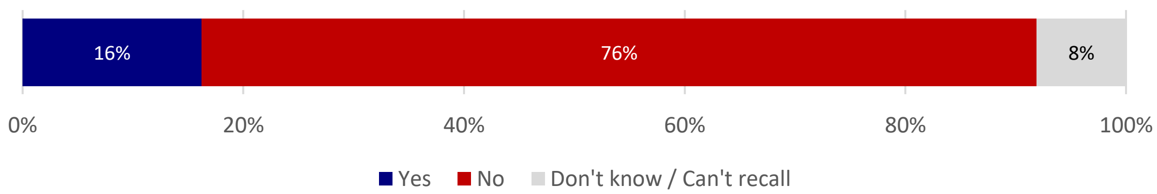
All users were able to get a seat immediately on boarding their most recent bus, the great majority because there were seats available.

On your most recent bus journey, were you able to get a seat immediately upon boarding? (Q23, n=37)



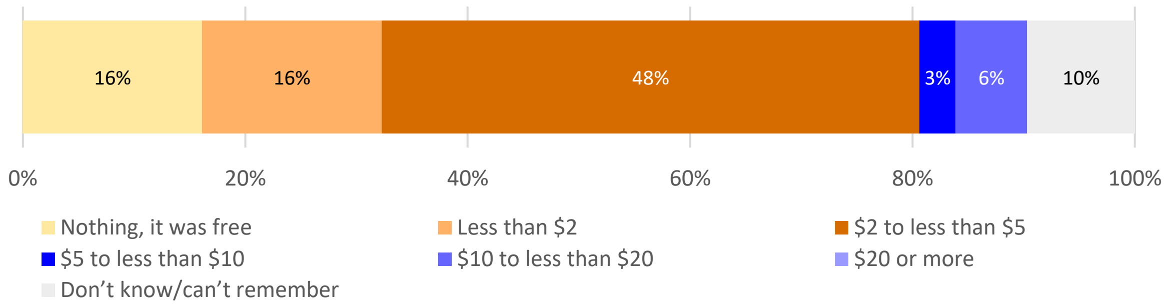
16% (6 users) reported using a Regional Excursion Daily (RED) ticket for the most recent journey.

Did you use a Regional Excursion Daily (RED) ticket on your most recent bus journey? (Q24, n=37)



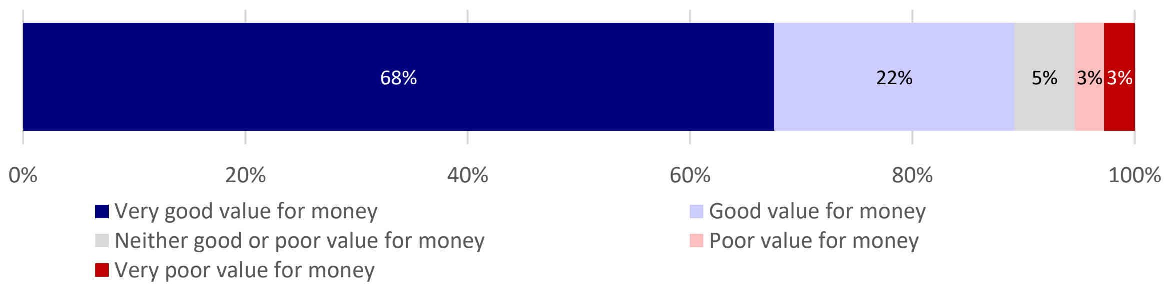
For those who did not use a RED ticket, 80% estimated their fare was less than $5 (with 16% who indicated the trip was free).

What was the one-way fare on your most recent bus journey? (Q25, n=31)



Overall, 89% of bus users felt that the fare they paid for their most recent trip represented good or very good value for money. Only 6% indicated they felt the ticket was poor value. The table below shows the distribution of users' views of value broken down by the fare they paid (due to the small sample sizes involved, the table shows numbers of individual respondents rather than percentages).

Do you think the fare you paid on your most recent bus journey represented value for money? (Q26, n=37)



VALUE BY COST	Used RED ticket	Ticket cost free	<$2	$2-$5	>$5
Very good value	5	5	4	9	-
Good value	-	-	1	5	1
At least good value	**5**	**5**	**5**	**14**	**1**
Less than good value	1	-	-	1	2
Base	*6*	*5*	*5*	*15*	*3*

The sample sizes for the supplementary samples are too small to draw anything but the most cursory of observations across the groups. However, it is notable that by comparison to the general group of users, the supplementary groups (other than females) appear somewhat more likely to report using buses to get to medical appointments

Summary of most recent bus trip by supplementary samples

Details of Most Recent Trip	Total Main Sample	Females	Aged 40+	Centrelink /DVA	Disability
ⓘ *Sample size*	*37*	*25*	*25*	*19*	*9*
Within last week	41%	40%	32%	32%	56%
Main purposes	Shopping – 35% Social / recreation – 19%	Shopping – 44% Social / recreation – 16%	Shopping – 36% Medical – 16%	Shopping – 47% Medical – 16%	Shopping – 44% Medical – 33%
Pick up on time	95%	100%	100%	100%	100%
Destination on time	92%	96%	100%	95%	89%
Seated on boarding	95%	100%	96%	95%	89%
Used RED ticket	16%	24%	20%	26%	22%
Free	16%	21%	5%	7%	-
<$2 fare *includes free fares*	32%	37%	30%	36%	57%
At least good value	89%	88%	92%	84%	78%

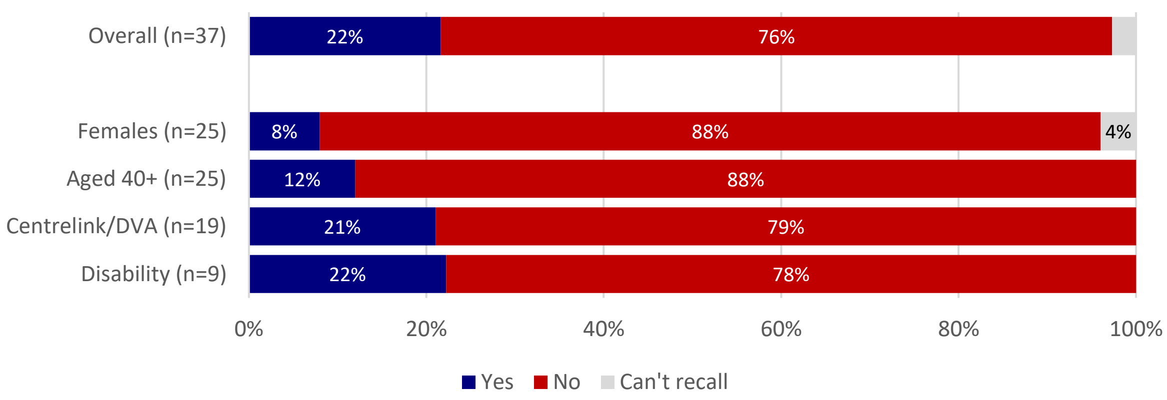
ⓘ Caution – small sample sizes. Interpret patterns with care.

Unsuccessful trips

Of those people who have used buses in the last 6 months, around a quarter (22%) indicated that there had been at least one occasion in that time where they had considered or tried to get a bus, but did not. These can be thought of as 'unsuccessful trips'.

This was somewhat more common amongst those bus users who had a disability and / or who receive Centrelink/DVA benefits – noting of course the small sample sizes involved here. Especially for users with a disability.

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? (Q29a, n=37)



Of those who have had a unsuccessful trip (n=7 people), alternatives included getting a lift from someone (n=2), taking a taxi (n=2), driving themselves (n=1), or walking (n=1) .

Factors affecting choice of buses

Reasons for using or not using buses draw on responses from both the small group of people who use them (n=37) and also the much larger sample of current non-users (n=582). A range of potentially influential factors are considered in this section:

- Willingness / interest
- Cost
- Convenience
- Knowledge

At the end of the section the relative salience of these and some additional factors to choices of bus usage are considered, along with factors that might encourage greater use of buses.

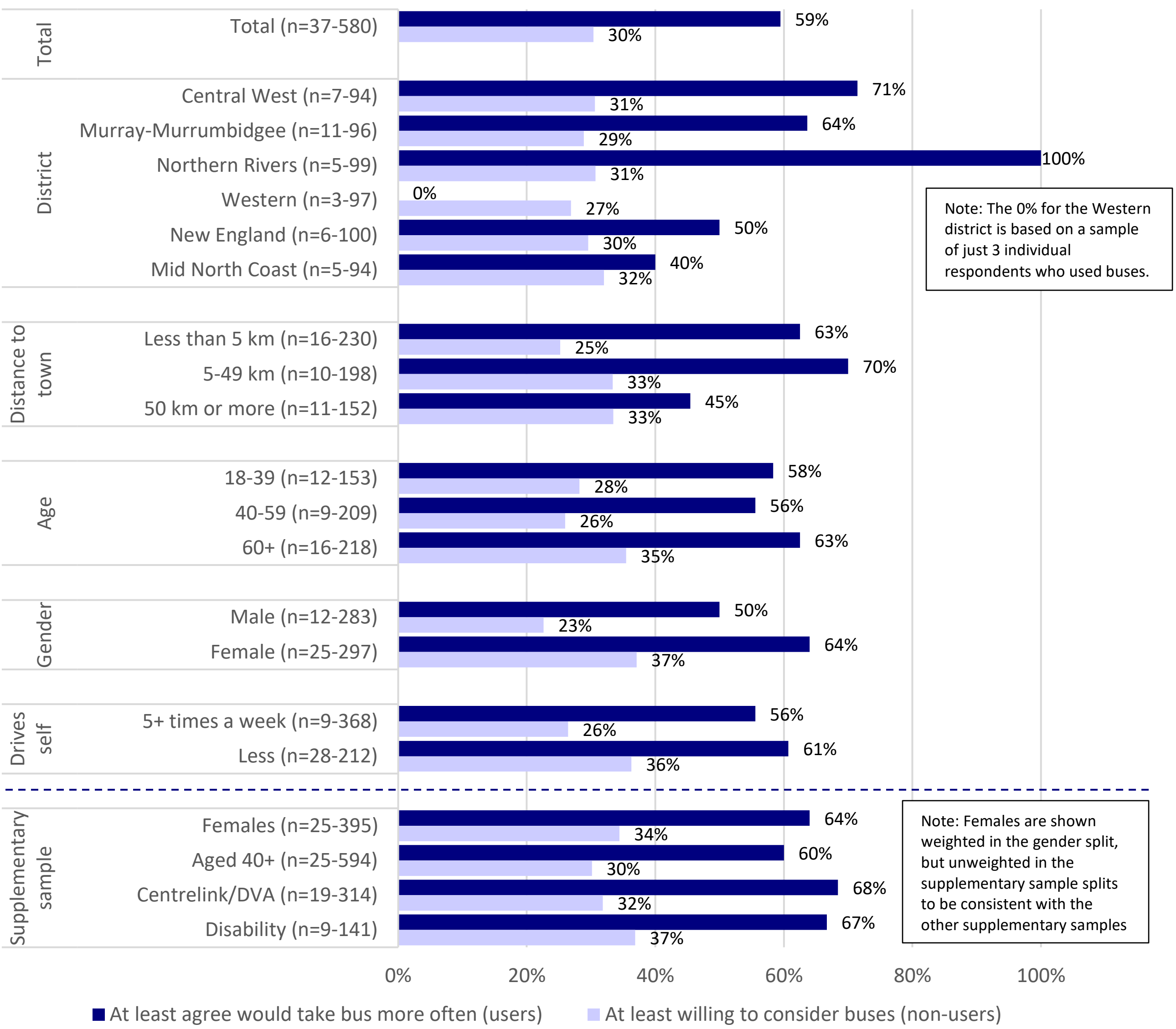
Willingness / interest

There is a moderate level of willingness or interest in catching buses or using them more often.

Overall, nearly two-thirds of the current users (59%) agreed to at least some extent that they would like to catch buses more often, while nearly a third of non-users (30%) were at least willing to consider using buses to get around their regional area in the next six months. Of the non-users, willingness to consider buses was somewhat higher amongst women and those with a disability (both 37%), those who drive themselves less often (36%), and those aged over 60 (35%).

To what extent do you agree or disagree with the statement: I would like to take the bus more often.
(Q30, bus users n=37)

To what extent are you open to using buses to get around your regional area in the next six months?
(Q39a, non-bus users n=580)



Note: The 30% of non-users who are at least willing to consider using buses are reported on separately in following sections as "**willing non-users**". This group might be thought of as the most available potential users of buses, and their responses on a number of questions are somewhat different to the total non-user group.

71% of non-bus users could imagine a trip they might consider using a bus for. Broadly the types of trips they imagined were similar to those that users take, with social/recreational trips most commonly imagined, and shopping trips the next most common specific trip.

Can think of trip to catch bus and reasons (Q39 non-bus users, by region)

	Total	Central West	Murray-Murrum bidgee	Northern Rivers	Western	New England	Mid North Coast
Can you think of a trip where you would consider using a bus? Yes	**71%**	68%	72%	77%	60%	68%	70%
Sample size	*388*	*68*	*65*	*63*	*62*	*67*	*63*
REASONS (coded)							
Social or recreational activity	**20%**	13%	23%	22%	14%	23%	21%
Generic short trip	**17%**	19%	10%	19%	11%	18%	18%
Shopping trip	**12%**	9%	9%	17%	16%	6%	17%
Getting to or from work	**9%**	9%	14%	10%	13%	8%	4%
No other transport options available	**5%**	2%	-	10%	6%	5%	7%
Medical appointment	**4%**	7%	6%	4%	5%	5%	-
Connecting to another mode of transport	**3%**	9%	2%	2%	-	5%	1%
Getting to or from school, TAFE, university	**0%**	-	-	-	3%	-	-
Trip relates to intra-regional travel	***28%***	*28%*	*36%*	*15%*	*33%*	*27%*	*32%*
Other comment	***1%***	*4%*	-	*2%*	-	*2%*	-
Sample size	*267*	*46*	*46*	*48*	*38*	*45*	*44*

Can think of trip to catch bus and reasons (Q39 non-bus users, by distance)

	Total	Less than 5 km	5-9 km	10-19 km	20-49 km	50 km or more
Can you think of a trip where you would consider using a bus? Yes	**71%**	61%^	79%	67%	83%^	74%
Sample size	*388*	*159*	*31*	*29*	*65*	*104*
REASONS (coded)						
Social or recreational activity	**20%**	29%^	14%	40%^	17%	8%^
Generic short trip	**17%**	14%	7%	14%	26%	16%
Shopping trip	**12%**	12%	25%	9%	13%	9%
Getting to or from work	**9%**	8%	7%	15%	6%	11%
No other transport options available	**5%**	7%	15%	-	2%	3%
Medical appointment	**4%**	4%	6%	-	5%	5%
Connecting to another mode of transport	**3%**	2%	8%	-	2%	6%
Getting to or from school, TAFE, university	**0%**	0%	-	-	-	-
Trip relates to intra-regional travel	***28%***	*23%*	*16%*	*21%*	*27%*	*41%*
Other comment	***1%***	*1%*	-	-	*1%*	*3%*
Sample size	*267*	*94*	*25*	*21*	*53*	*74*

Can think of trip to catch bus and reasons (Q39 non-bus users, Supplementary samples)

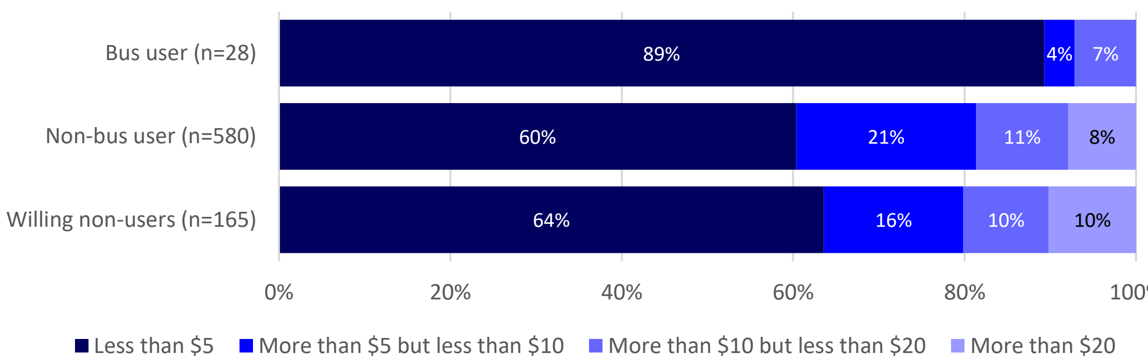
	Total	Females	Aged 40+	Centrelink /DVA	Disability
Can you think of a trip where you would consider using a bus? Yes	**71%**	73%^	71%	70%	76%
Sample size	*388*	*213*	*272*	*208*	*96*
REASONS (coded)					
Social or recreational activity	**20%**	10%^	14%^	10%^	12%
Generic short trip	**17%**	17%	16%	19%	19%
Shopping trip	**12%**	11%	15%	17%	23%^
Getting to or from work	**9%**	8%	6%	1%^	4%
No other transport options available	**5%**	6%	5%	4%	1%
Medical appointment	**4%**	9%	8%	12%^	10%
Connecting to another mode of transport	**3%**	5%	3%	6%^	4%
Getting to or from school, TAFE, university	**0%**	0%	0%	-	-
Trip relates to intra-regional travel	***28%***	*31%*	*29%*	*28%*	*21%*
Other comment	***1%***	*3%*	*3%*	*3%*	*5%*
Sample size	*267*	*203*	*268*	*145*	*73*

Cost

Cost expectations could be a minor barrier to some non-users' choices about buses. When asked to think of a trip that they might make by bus, non-users tended to anticipate a higher fare than was reported for the last trip by actual users. This doesn't necessarily mean that fares are a barrier to choices, but does suggest that non-users may be over-estimating the costs that would be associated with bus usage.

Willing non-users estimates of likely fares were similarly higher than actual reported fares.

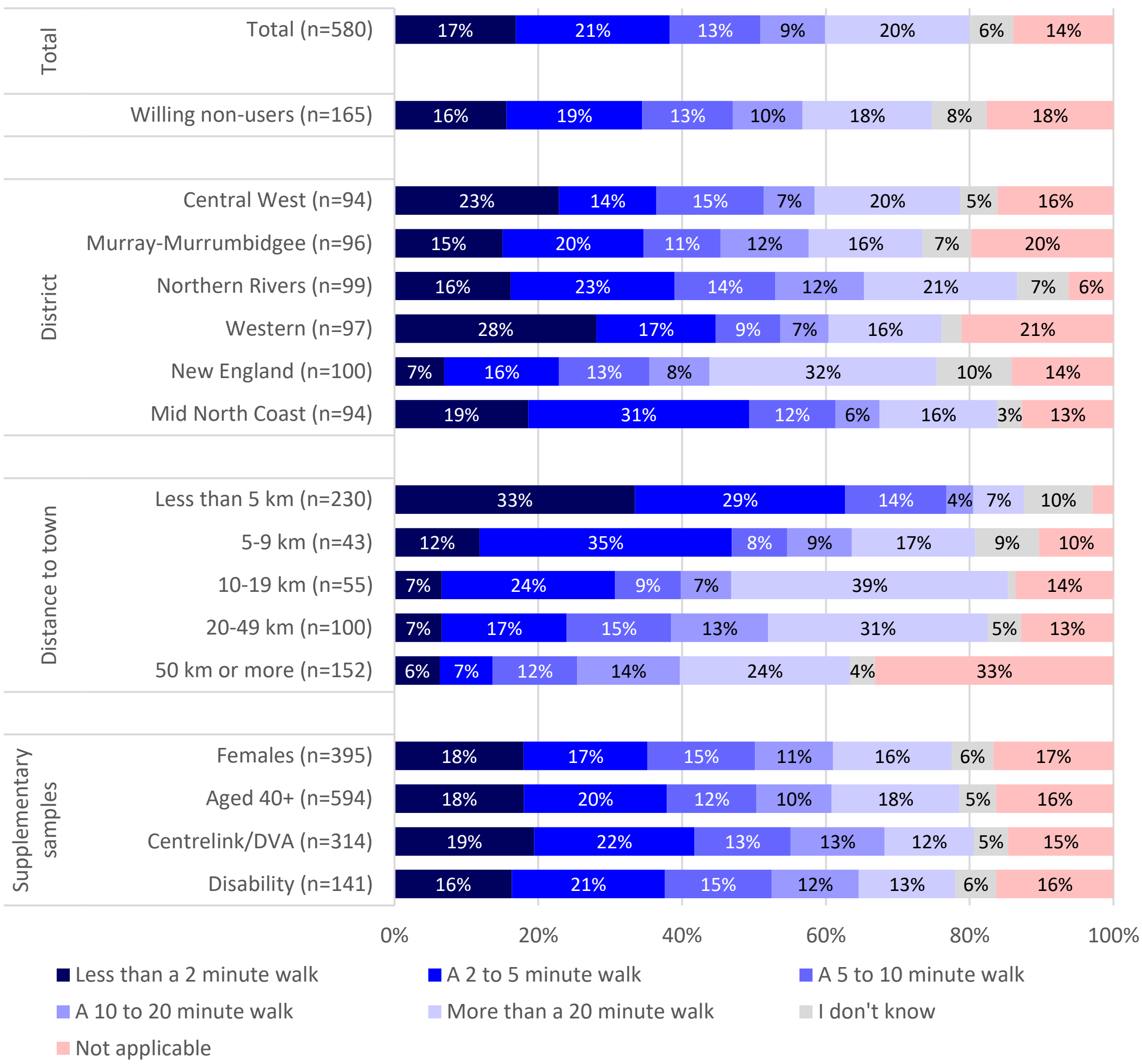
Last one-way fare (Q25 bus users) / **Estimated cost of trip on bus** (Q34 non-bus users)



Convenience

Convenience may also present some level of barrier to non-bus users. Only 38% estimated that their nearest bus stop was within a 5-minute walk of their home, and 20% estimated it was more than a 20-minute walk to the nearest bus stop. The willing non-users group were not substantially different from the non-user group as a whole, but if anything were slightly *less* likely to feel there was a nearby bus stop.

Not counting bus stops that are only used by school buses, how close is the nearest bus stop to your home?
(Q36 non-bus users)

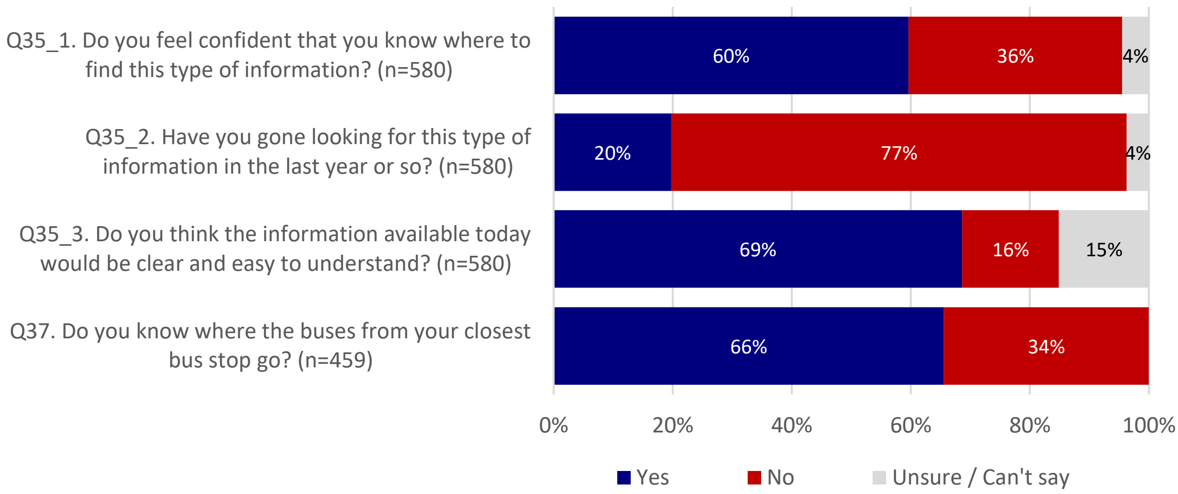


Knowledge

Substantial proportions of non-users (top chart) feel confident in their ability to get whatever information about buses they may need. Despite only 20% having sought out any of that type of information in the last 12 months, 60% feel confident they know where to find it, and 69% that what information they found would be clear and easy to understand.

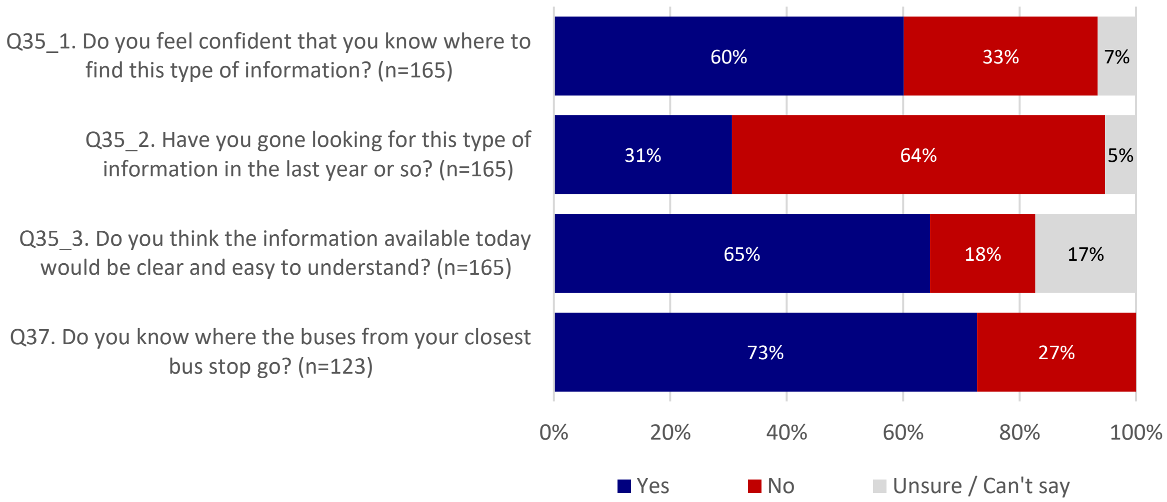
Two thirds of non-users who know where their nearest bus stop is, also know where the buses from that stop go to.

Thinking about information about buses in your area- for example, information about timetables, route maps, types of tickets, cost of tickets, and/or where to buy tickets… (Q35, Q37 non bus users)



The willing non-users group (bottom chart) was virtually identical to non-users overall in terms of knowledge-related potential influences, suggesting that information is a relatively minimal factor in willingness to start using buses.

Thinking about information about buses in your area- for example, information about timetables, route maps, types of tickets, cost of tickets, and/or where to buy tickets… (Q35, Q37 **willing** non-users)



There is remarkably little variation in information-related measures across the supplementary samples.

Thinking about information about buses in your area- for example, information about timetables, route maps, types of tickets, cost of tickets, and/or where to buy tickets (Q35, Q37)

By supplementary samples	Total	Females	Aged 40+	Centrelink /DVA	Disability
Q35_1. Do you feel confident that you know where to find this type of information?	**60%**	62%	58%	61%	57%
Q35_2. Have you gone looking for this type of information in the last year or so?	**20%**	21%^	18%	19%	21%
Q35_3. Do you think the information available today would be clear and easy to understand?	**69%**	66%	67%	67%	61%^
Sample size	*580*	*395*	*594*	*314*	*141*
Q37. Do you know where the buses from your closest bus stop go?	**66%**	68%^	72%^	74%^	70%^
Sample size	*459*	*306*	*467*	*253*	*110*

By region	Total	Central West	Murray Murrum-bidgee	Northern Rivers	Western	New England	Mid North Coast
Q35_1. Do you feel confident that you know where to find this type of information?	**60%**	59%	56%	62%	56%	49%^	68%^
Q35_2. Have you gone looking for this type of information in the last year or so?	**20%**	23%	18%	18%	16%	16%	23%
Q35_3. Do you think the information available today would be clear and easy to understand?	**69%**	71%	63%	67%	67%	64%	75%
Sample size	*580*	*94*	*96*	*99*	*97*	*100*	*94*
Q37. Do you know where the buses from your closest bus stop go?	**66%**	57%	63%	73%	68%	53%^	73%^
Sample size	*459*	*74*	*71*	*86*	*74*	*76*	*78*

By distance to nearest town	Total	Less than 5 km	5-9 km	10-19 km	20-49 km	50 km or more
Q35_1. Do you feel confident that you know where to find this type of information?	**60%**	59%	62%	66%	63%	54%
Q35_2. Have you gone looking for this type of information in the last year or so?	**20%**	22%	14%	20%	20%	18%
Q35_3. Do you think the information available today would be clear and easy to understand?	**69%**	70%	64%	75%	72%	62%
Sample size	*580*	*230*	*43*	*55*	*100*	*152*
Q37. Do you know where the buses from your closest bus stop go?	**66%**	55%^	74%	64%	76%^	74%^
Sample size	*459*	*205*	*35*	*44*	*83*	*92*

^ Indicates statistically significant differences to everyone not in the subgroup

Factors influencing decision making

The previous sections examine primarily non-users' expectations of buses generally. Both users and non-users were also asked about the importance of several different potential considerations when they chose to use or not use buses. As the same list of factors were used for each context, the results are shown here together.

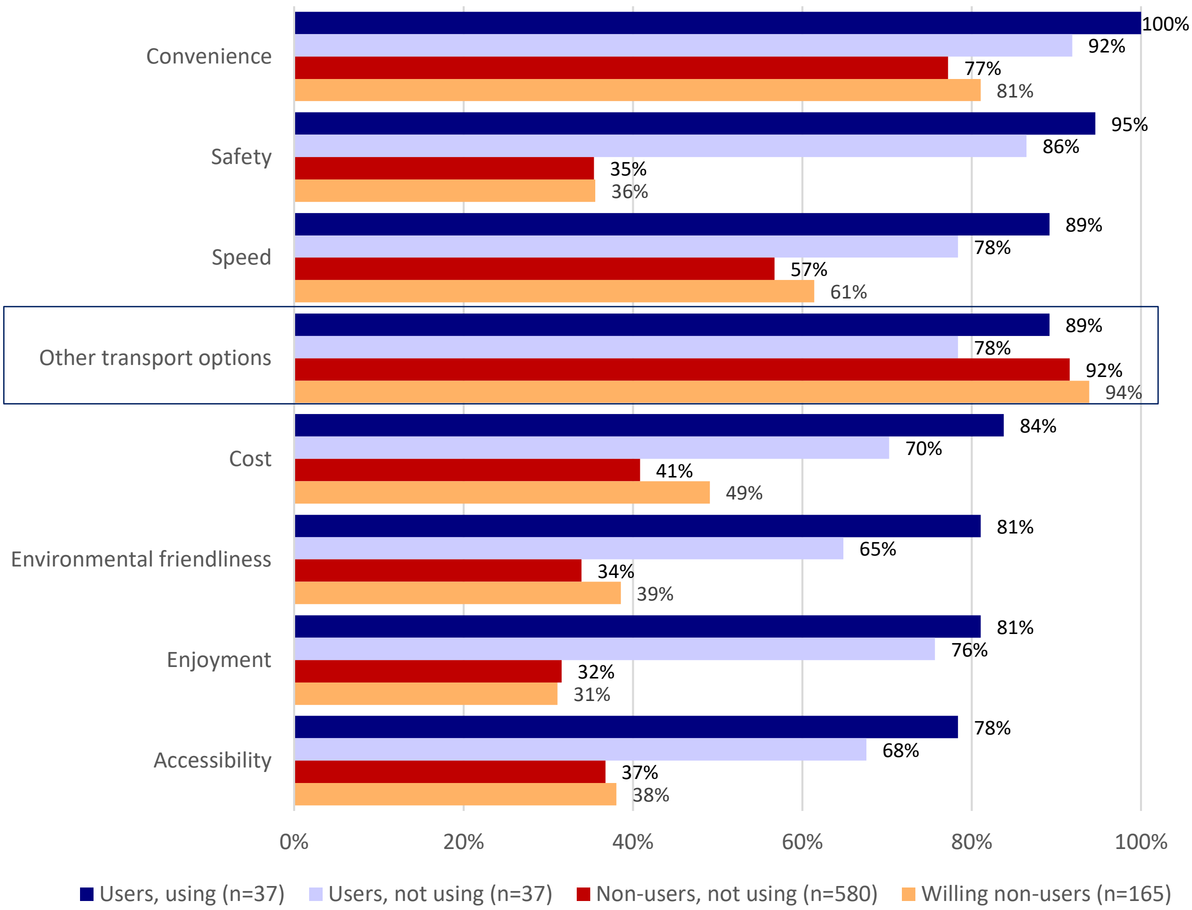
Beyond other transport options, convenience is the biggest factor for users in their decision to use buses, ahead of safety and speed. When they chose *not* to use a bus, convenience and safety were the most common considerations.

For non-users, having other transport options was the most common factor in their choice, ahead of convenience and speed. Safety is much less of a consideration for non-users than it is for users. For the '*willing* non-users' (that is, those non-users who were at least willing to consider using buses more), cost, having other options, convenience and speed were all slightly bigger considerations in their current reasons to not use buses.

Cost was more of a consideration for users when they chose to use buses rather than when they chose not to. However, it was less of a factor than convenience and speed for non-users when they chose other options.

When you choose to take a bus / not to take a bus, what is at important for you? (Q27, Q28 bus users)

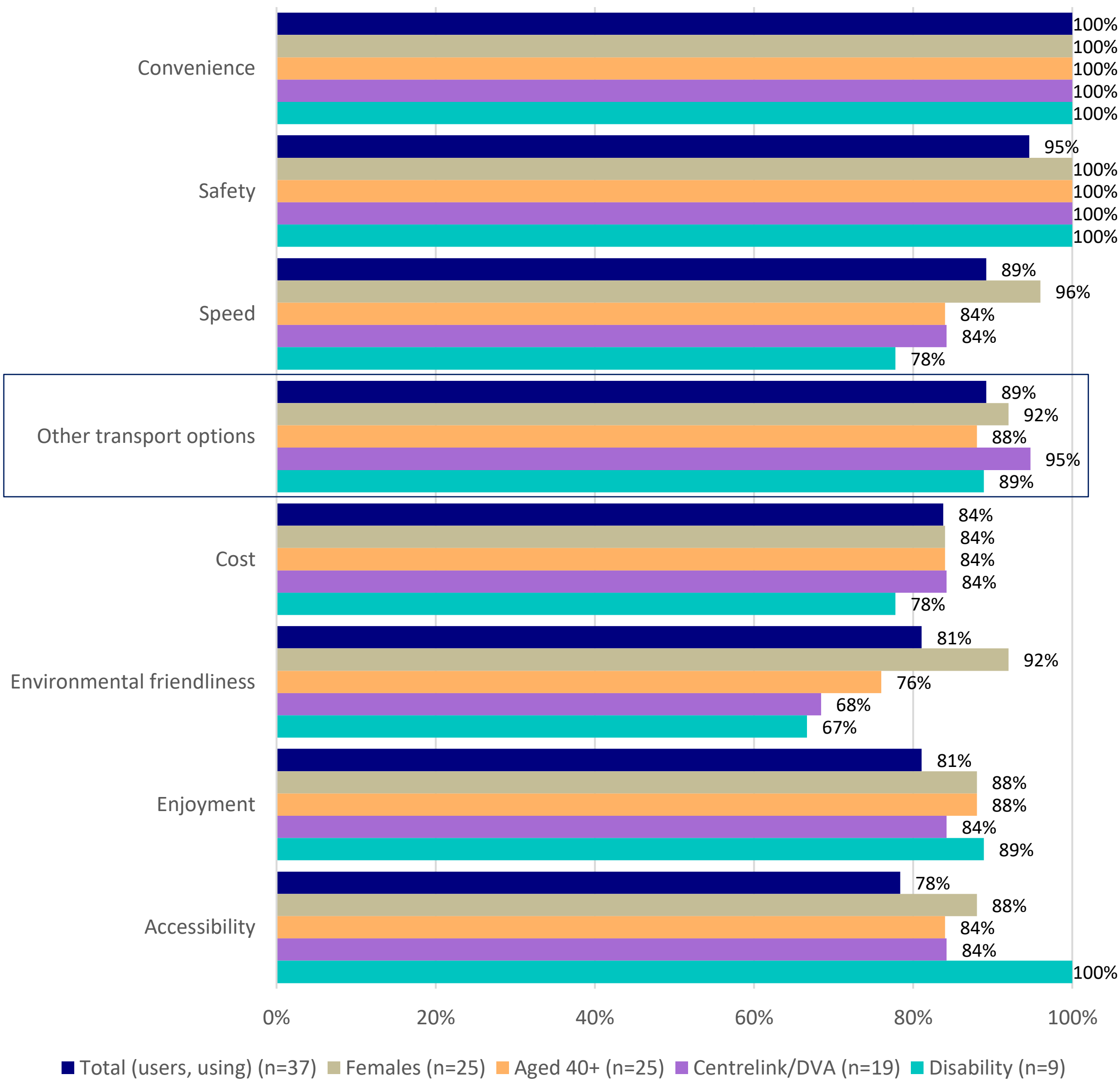
When you choose other transport, what is at important for you? (Q38 non bus users)



The following two charts break these reasons down amongst **users** from each of the **supplementary samples**. The first chart shows reasons for using buses, and the second chart on the following page shows reasons for not using buses.

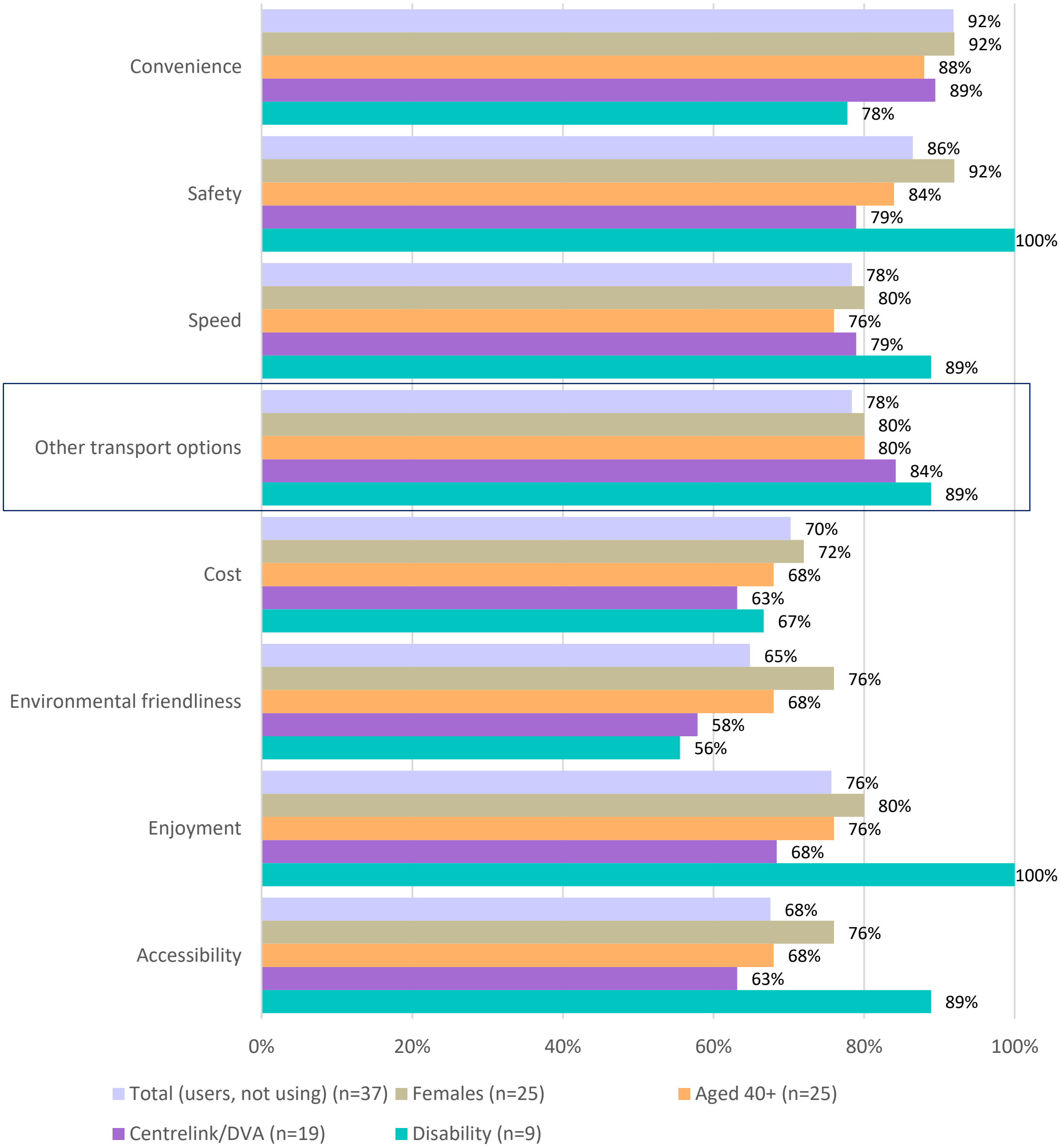
As sample sizes here are extremely small, these results are shown only for indicative purposes.

When you choose to take a bus transport, what is important for you? (Q27 by supplementary samples)



ⓘ Caution – small sample sizes. Interpret patterns with care.

When you choose <u>not</u> to take a bus transport, what is important for you? (Q28 by supplementary samples)

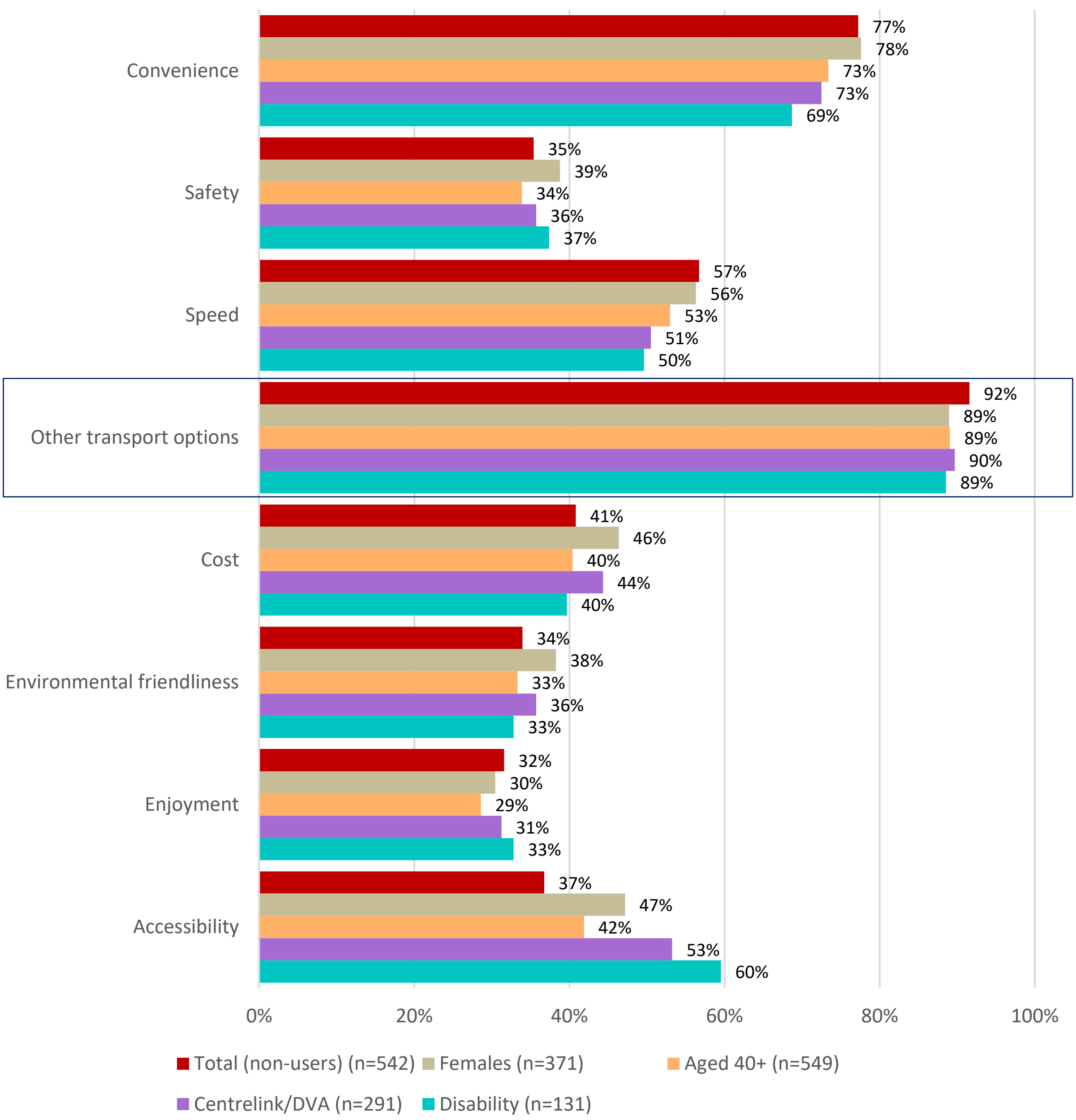


ⓘ Caution – small sample sizes. Interpret patterns with care.

Sample sizes for the **supplementary sample groups** are much larger amongst the **non-bus users**, enabling a more meaningful analysis of the reasons they choose other transport.

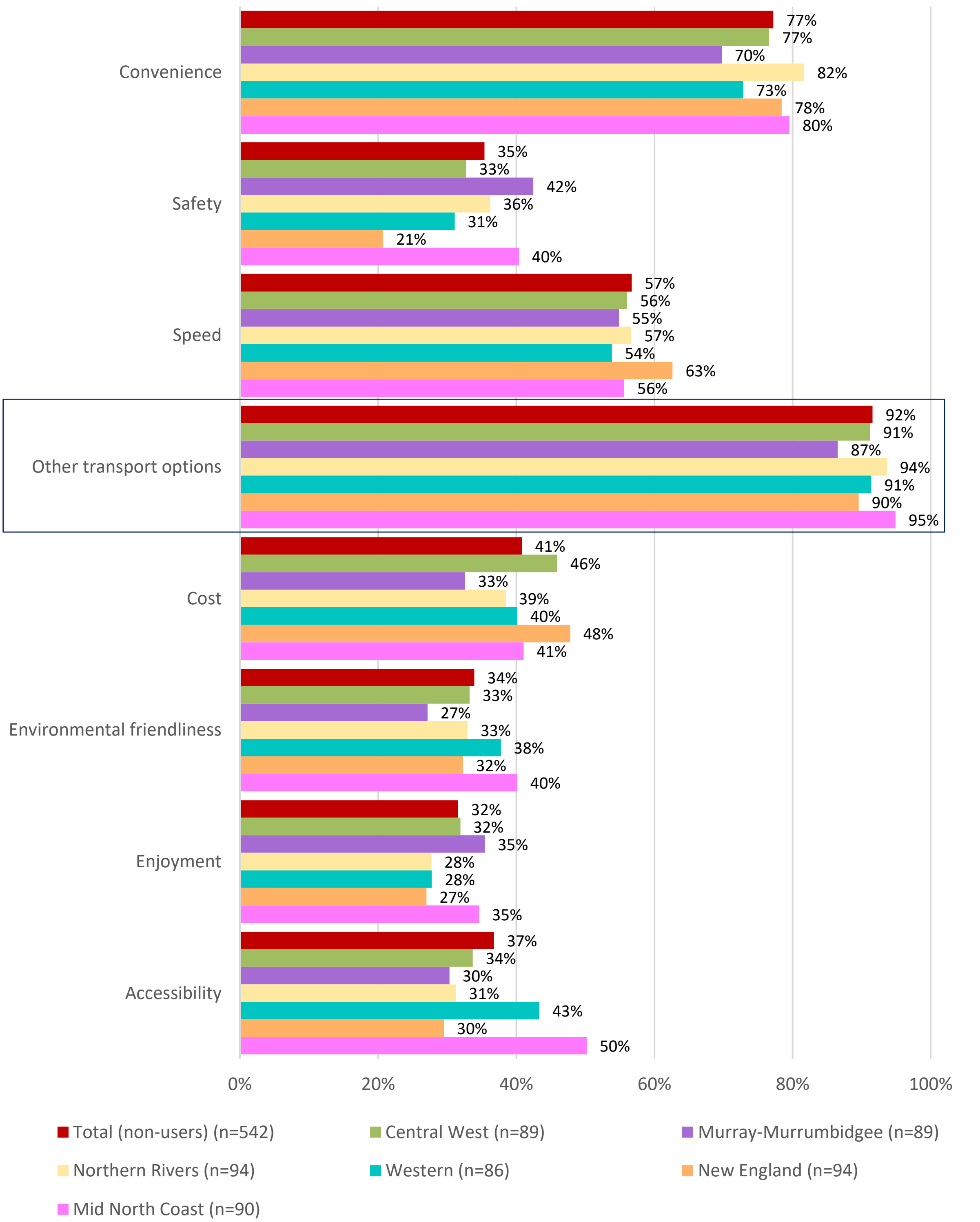
This shows relatively little difference in considerations across the respective groups. Perhaps the most notable are that safety is a bigger consideration for females; while for those with a disability and / or receiving Centrelink/DVA benefits convenience and speed are lesser considerations, but accessibility a greater consideration.

When you choose other transport, what is important for you? (Q38 by supplementary samples)



Similarly there is sufficient sample available to break **non-bus users** reasons down across **regions**. This shows that within a margin of error, the overall pattern of reasons for non-use across regions is fairly consistent.

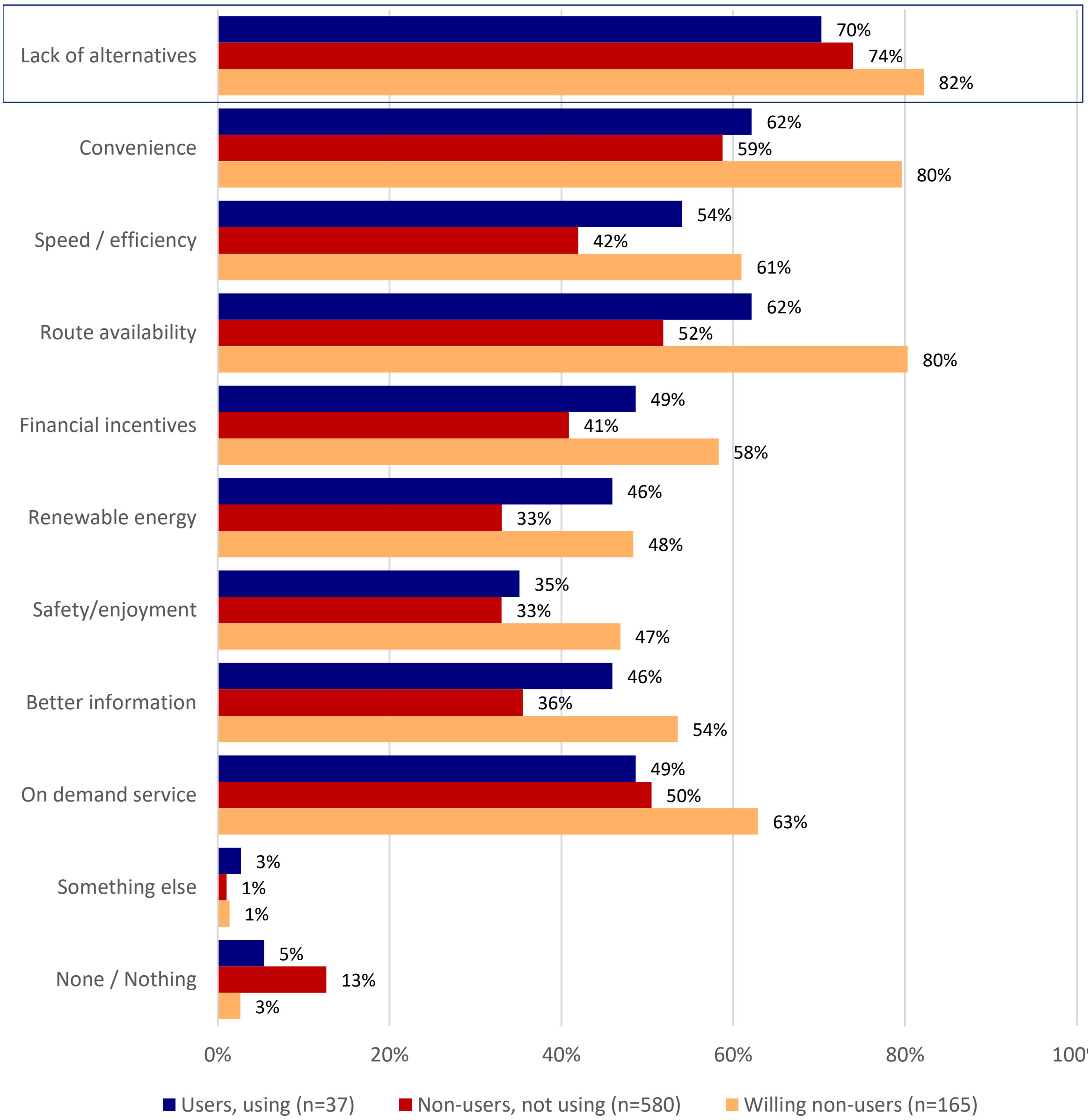
When you choose other transport, what is at least important for you? (Q38 by region)



Motivators for increasing bus use

Of particular interest are factors that may increase use of buses. Unlike motivations for current use, where there were relatively minor differences between all non-users and the willing non-users, there were quite substantive differences in what willing non-users thought might encourage them to use buses. Willing non-users were generally considerably more open to all possible influences, but a number of specific ones in particular.

Which of the following changes would make you more likely to take the bus more often / take the bus?
(Q31 bus users, Q40 non-bus users)

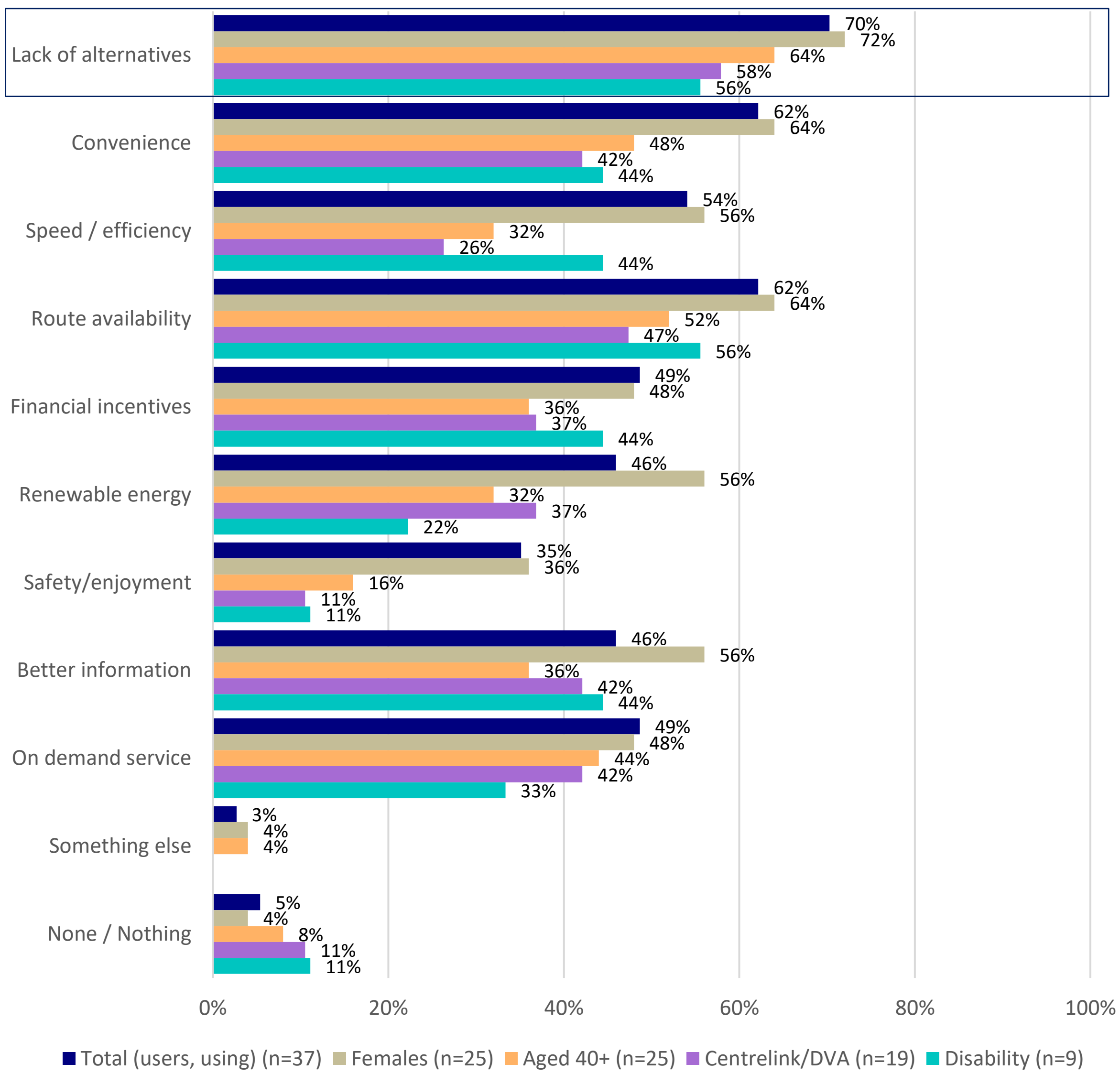


For non-users generally, aside from not being able to use alternative modes of transport, the most likely factors to encourage greater use of buses are convenience and route availability. Just over half indicated that an on-demand service might drive greater use, presumably in part because this could mitigate their speed and convenience concerns. Cost or financial incentives were somewhat less of a potential driver of choice, though considered potentially the most influential of the next tier of influences.

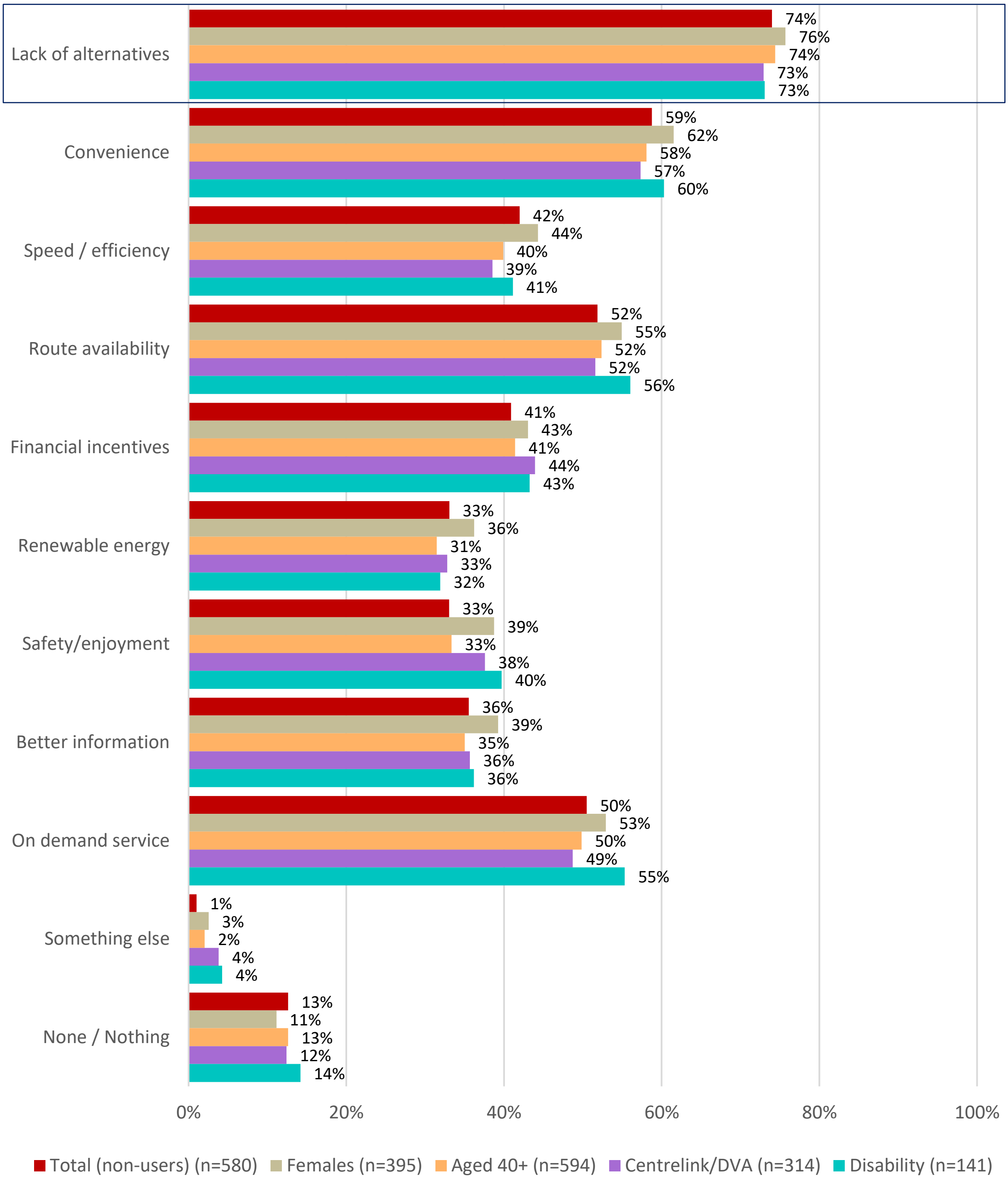
Amongst *willing* non-users (those non-users at least willing to consider using buses), each of the potential influences was more appealing. Convenience and route availability remain the biggest considerations that would drive them to consider buses, and are much higher than for general non-users. They are also somewhat more interested in an on-demand service, but given the disparity to convenience and route availability, perhaps may not understand this type of service could provide the convenience and route benefits they appear to want. Financial incentives are also potentially more appealing to this most-available non-user group.

Amongst current users the relative patterns of potential influences of increased use was similar. Compared to total non-users, speed / efficiency, renewable energy being used, and better information were all relatively more influential, but an on-demand service was no more appealing (and less appealing than for willing non-users).

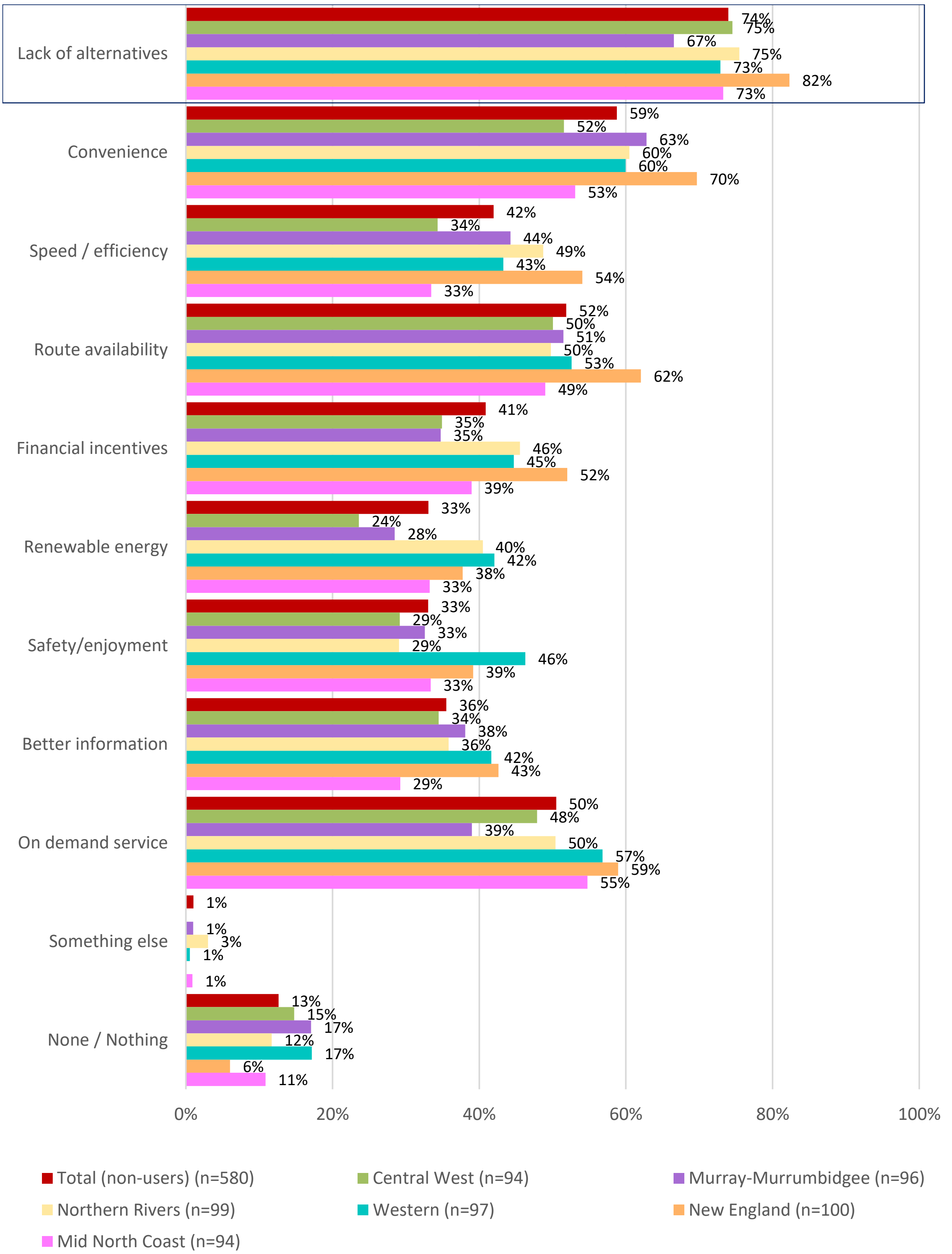
Which of the following changes would make you more likely to take the bus more often?
(Q31, Users, supplementary samples)



Which of the following changes would make you more likely to take the bus?
(Q40, Non-users, supplementary samples)



Which of the following changes would make you more likely to take the bus? (Q40, Non-users, by region)



C. On-demand bus service

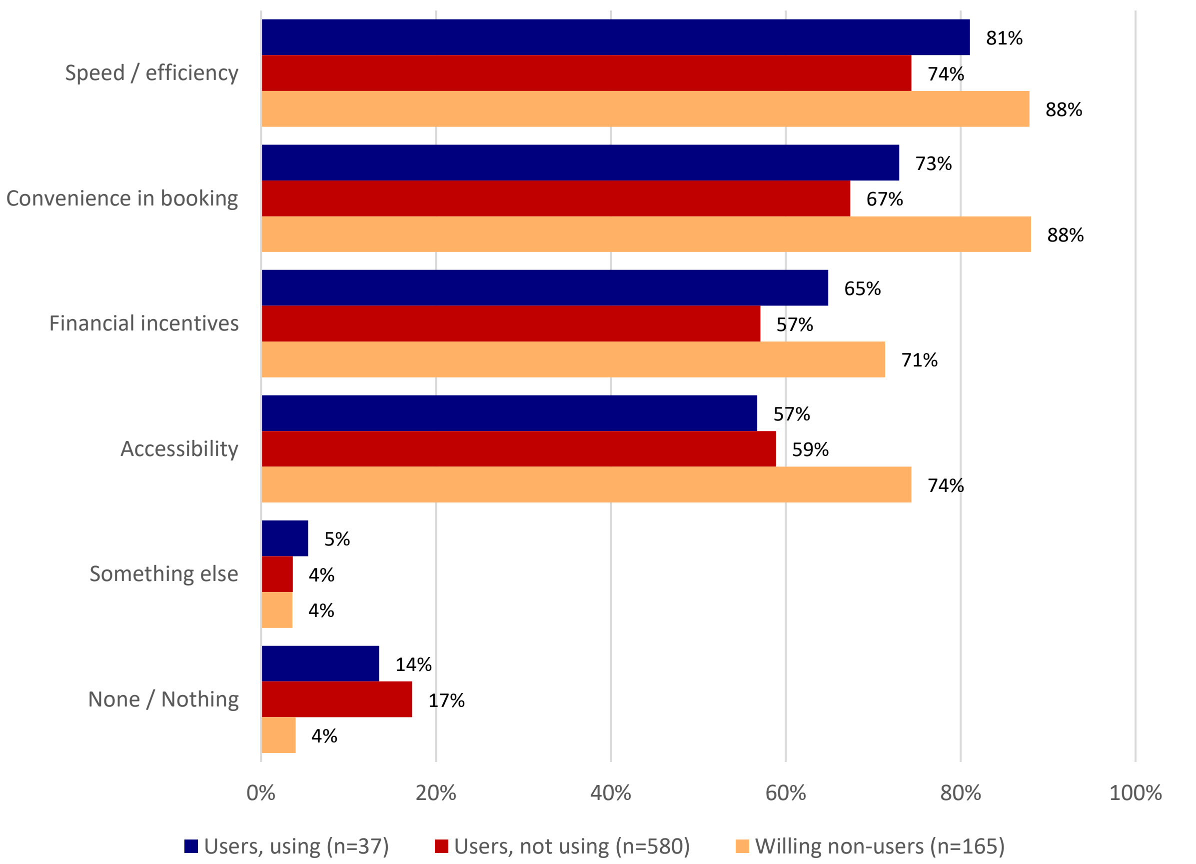
Respondents, both bus users and non-bus users were asked to "*imagine a new 'on-demand' bus service that you can pre-book and which provides more flexibility in terms of when and where you can get picked up and dropped off. It could pick you up, plus other passengers, along the way, and drop you off at any location that you request, including your own home.*"

Motivators for on-demand use

For current bus users, non-users, and especially the willing non-users, speed / efficiency and booking convenience were the two things that might attract more interest in use of such an on-demand bus service. Given the relative importance of speed, convenience and routing that has been observed across the 2020 survey, the fact that these two considerations emerge most strongly is entirely consistent.

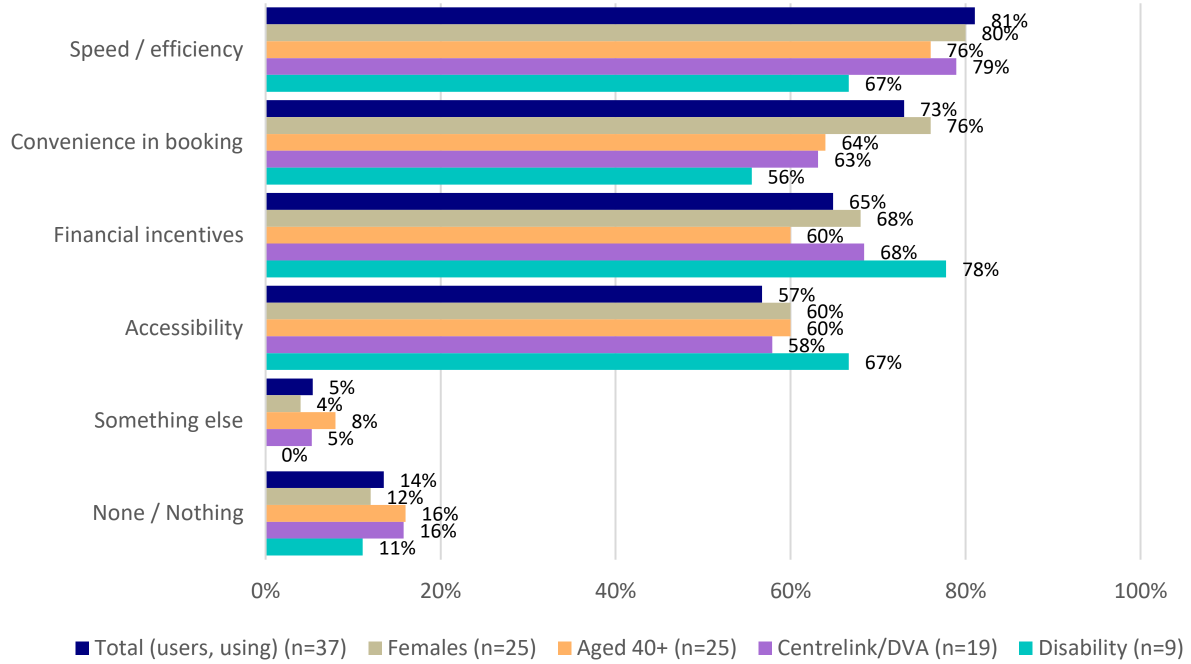
Relatively few respondents indicated there was nothing that would make them likely to use an on-demand service, suggesting that the community is broadly receptive to the potential for a service of this nature.

Which of the following would make you likely to use this kind of on-demand bus service?
(Q32 bus users, Q41 non-bus users)

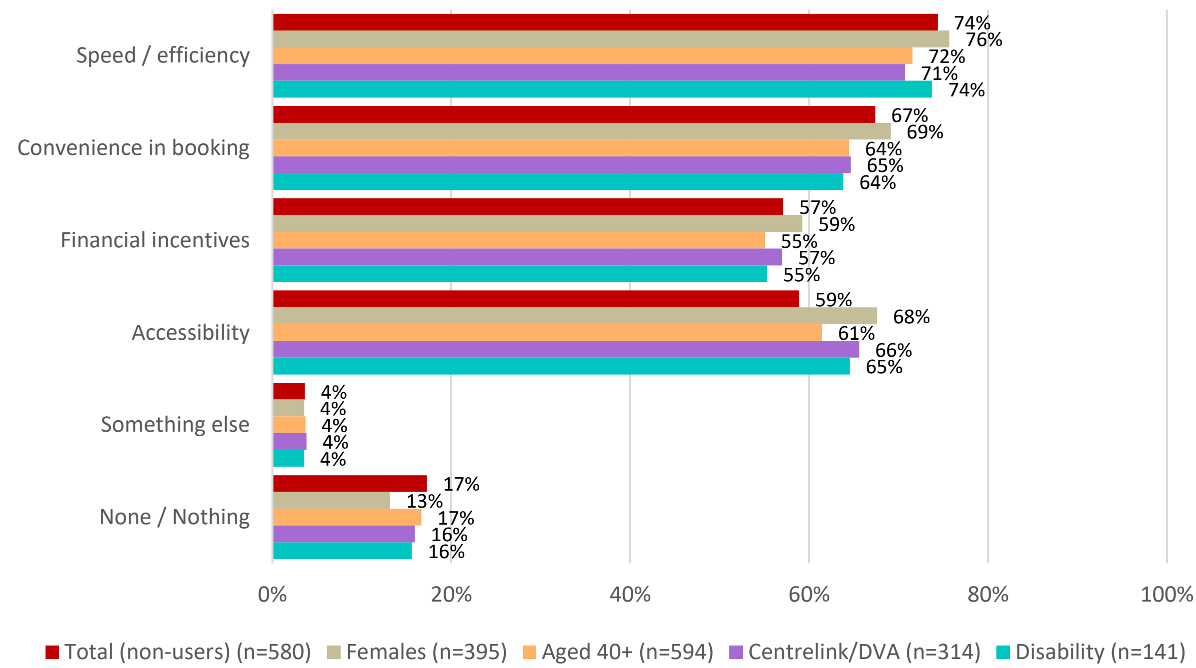


Amongst the supplementary samples, the overall story is not that dissimilar. All four major incentives have a moderately-high level of appeal, with speed / efficiency marginally higher. Perhaps the most notable feature of the charts here is that financial incentives are actually the least appealing aspect amongst the non-users in each of the supplementary groups, compared to the other more practical aspects.

Which of the following would make you likely to use this kind of on-demand bus service?
(Q32 users, supplementary samples)

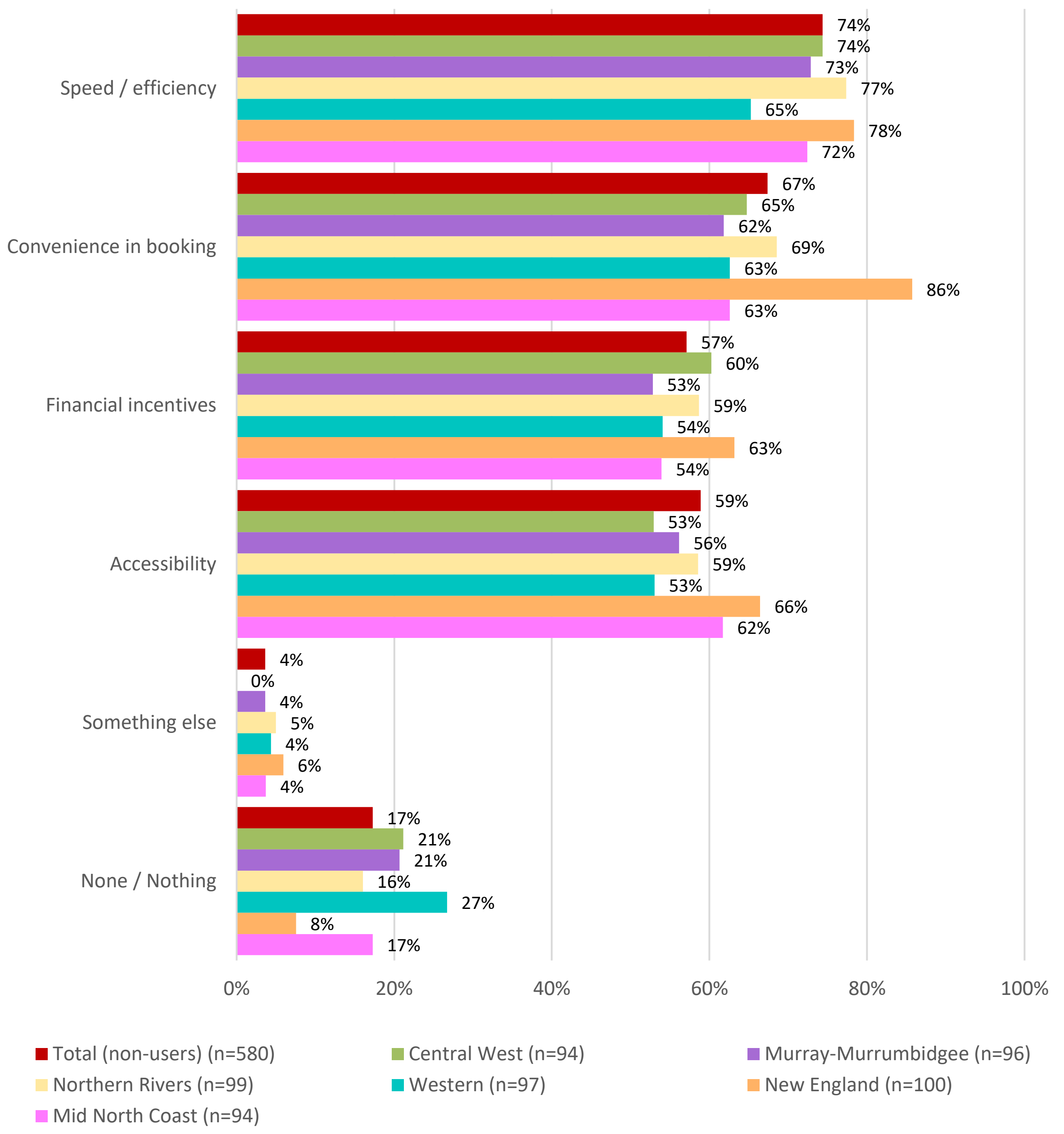


Which of the following would make you likely to use this kind of on-demand bus service?
(Q41 non-users, supplementary samples)



Broadly, interest across regions was more consistent than distinct – with the possible exception of New England. Respondents from this region were the most interested in all potential benefits, but especially convenience in booking. In practice this apparent level of regional differentiation seems surprising, but if there are corroborating circumstances relating to that region, then it is possible that it is a region which is particularly open to an on-demand service.

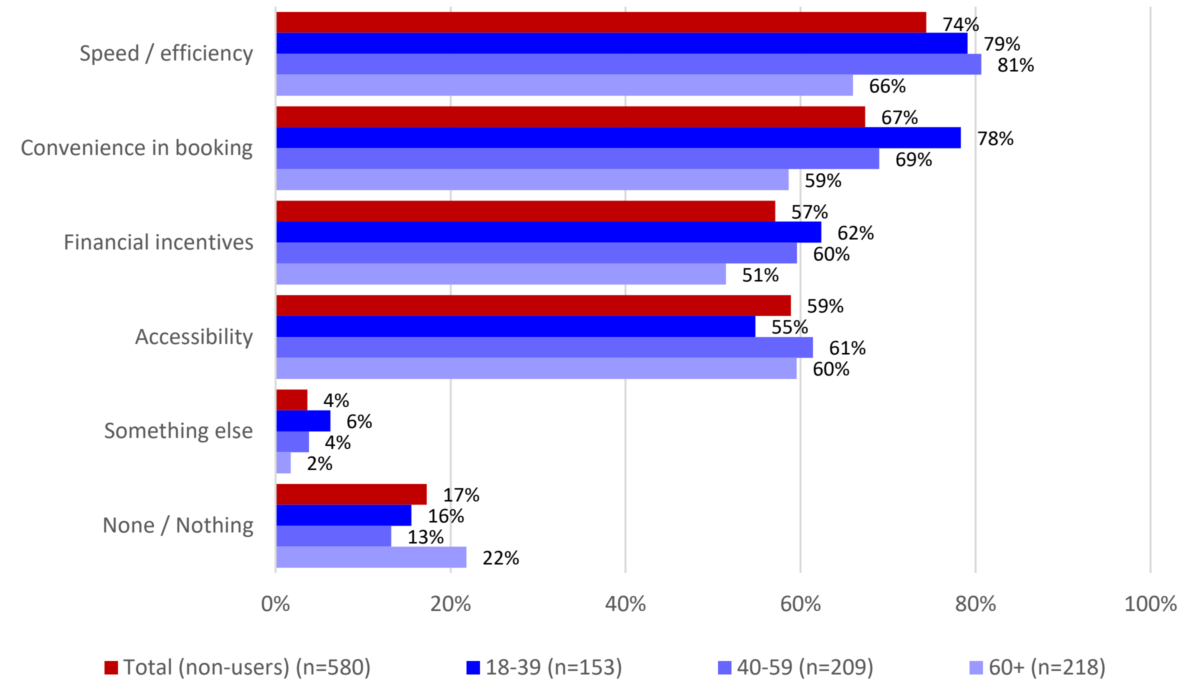
Which of the following would make you likely to use this kind of on-demand bus service?
(Q41 non-users, regional)



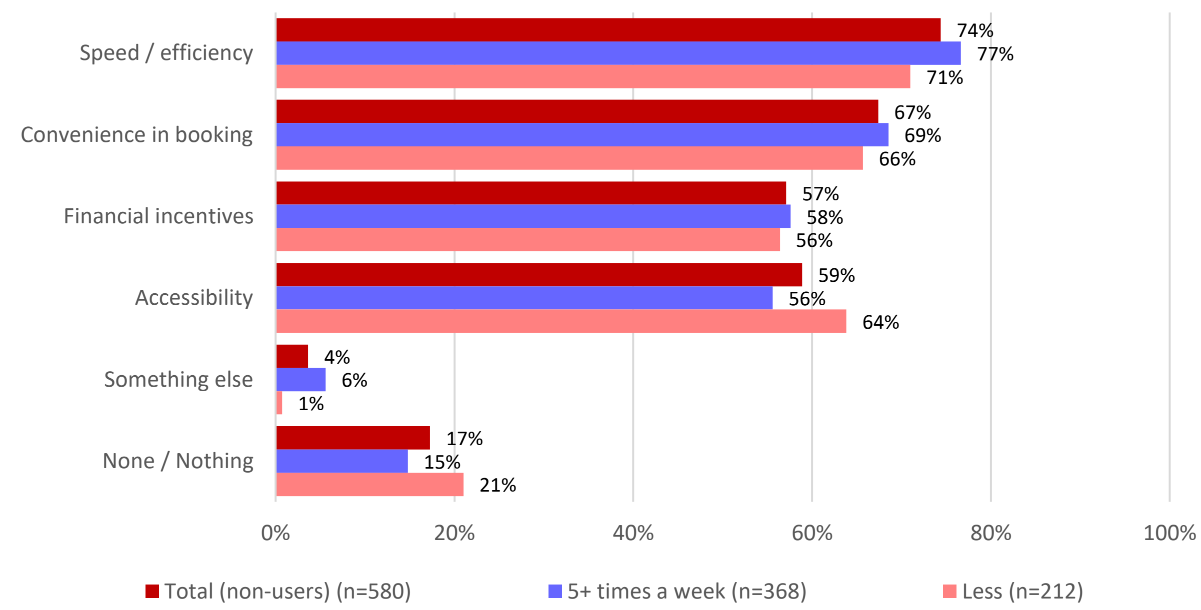
Note: Sample size for bus users is insufficient to provide a breakdown by regions.

There were also variations in interest based on age, and even the frequency with which people drive themselves. While these differences may only be nuances in the bigger patterns, they may provide some insight into potential motivations for using on-demand services.

Which of the following would make you likely to use this kind of on-demand bus service?
(Q41 non-users, age)



Which of the following would make you likely to use this kind of on-demand bus service?
(Q41, non-users, frequency of driving personal vehicle)

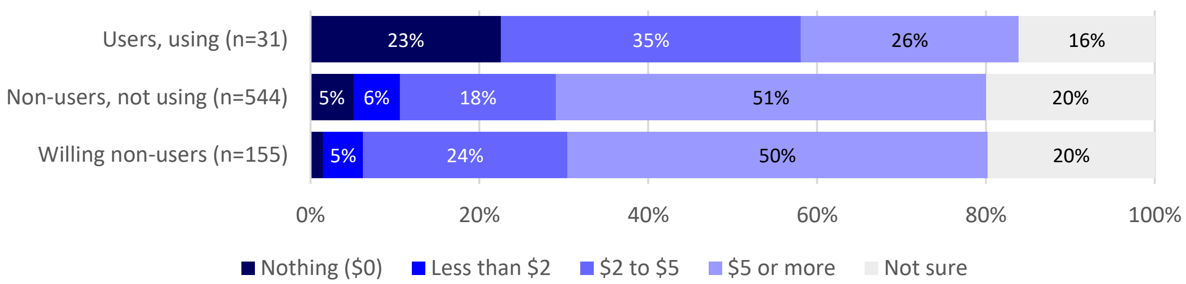


Willingness / expectation to pay

The majority of survey respondents would expect to pay between $2 and $5 more for a trip using an on-demand bus service compared to a standard bus service. Non-users have somewhat higher expectations of how much more fares would be on an on-demand bus service compared to what current users would be willing to pay.

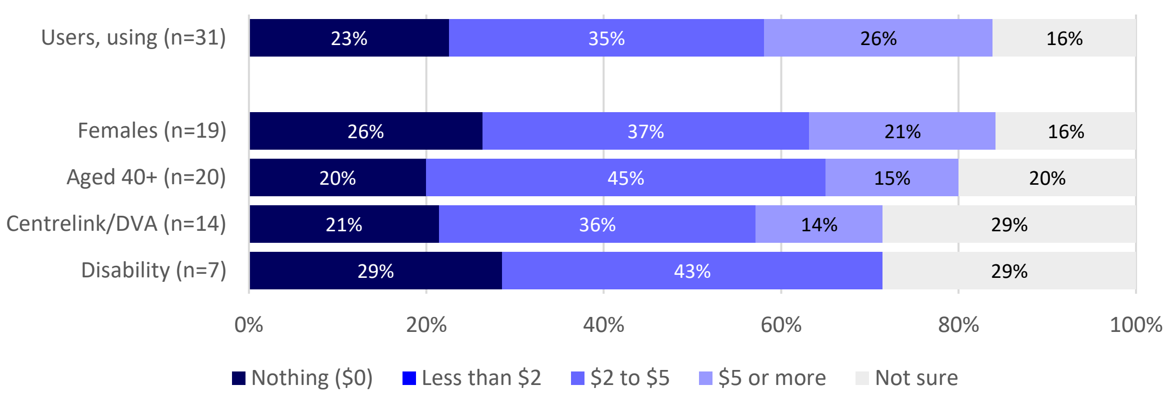
A quarter of the current users were not willing to pay anything more for an on demand bus, and only another quarter were prepared to pay more than $5. By comparison, only 5% of non-users expected that an on-demand service would cost no more than a normal bus service, and half expected it to cost at least $5 more per trip. Willing non-users had, if anything, slightly higher expectations of how much additional on-demand fares would be.

If you were to use a more convenient service for a bus journey, like an on-demand service, how much more would you be willing to pay for this journey (q25a users) **/ expect to pay for the trip than using a usual bus service?** (q34a non-bus users)

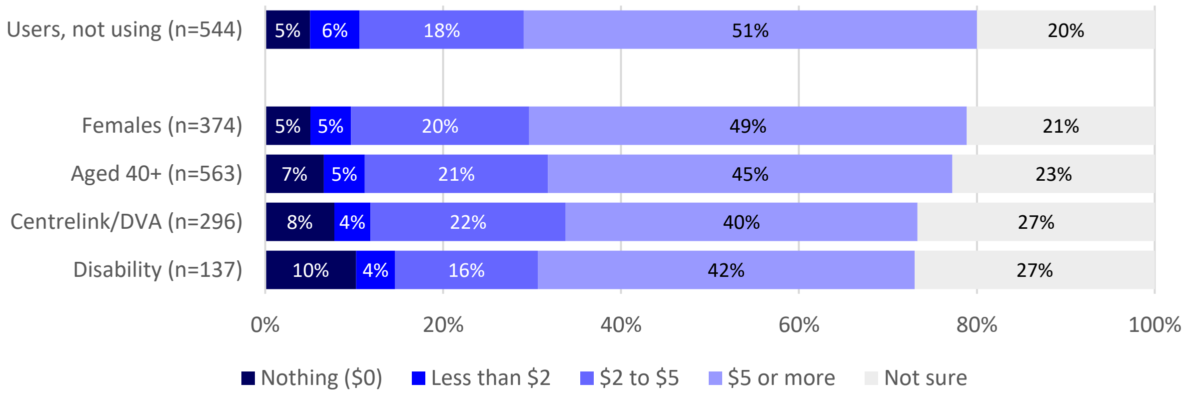


Across the supplementary samples, and allowing for the small sample sizes involved, there was no obvious difference in the amount current users were willing to pay for an on-demand service. If anything, those in the disability group and those on Centrelink/DVA benefits had the slightly lower willingness to pay. Amongst the non-users (next page), these groups also had the lowest expectations of a price premium for an on-demand service.

If you were to use a more convenient service for the above bus journey, like an on-demand service, how much more would you be willing to pay for this journey? (Q25a, Users, supplementary samples)

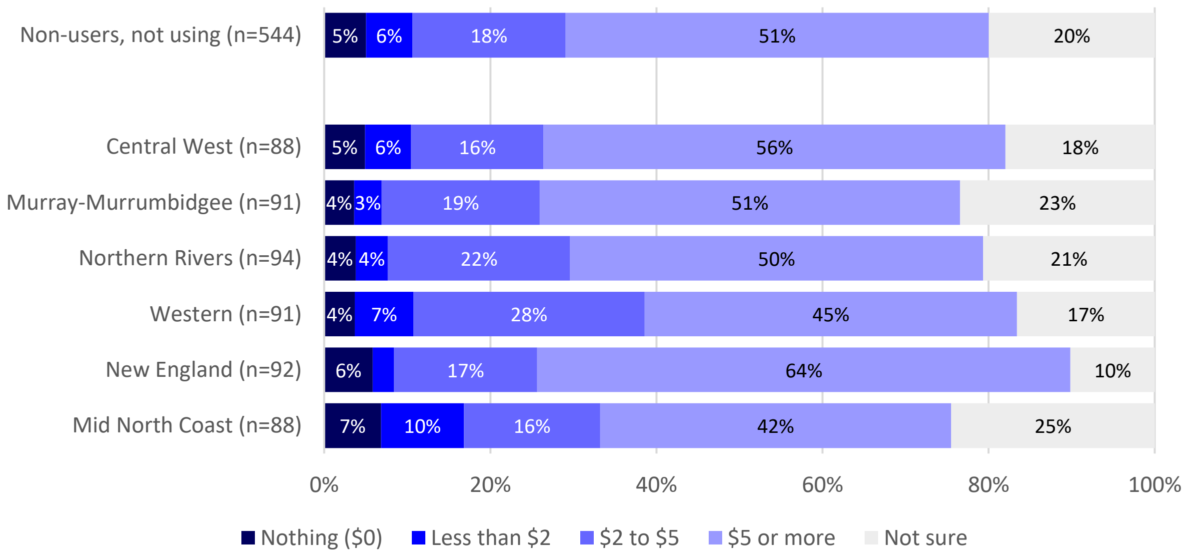


If you were to use a more convenient service for the above bus journey, like an on-demand service, how much more would you expect to pay for the trip than using a usual bus service?
(Q34a, non-bus users, supplementary samples)



There were no substantive variations in expectations of a price premium for an on-demand service across regions.

If you were to use a more convenient service for the above bus journey, like an on-demand service, how much more would you expect to pay for the trip than using a usual bus service? (Q34a, non-bus users, by region)



D. Awareness of 2018 fare changes

Awareness of changes being made to bus fares in 2018 was very low. Even amongst the small group of recent bus users, less than half were even partially aware of changes being made (40%). In the general community, 89% reported not having been aware that there were changes made recently to maximum bus fares.

Changes were made to the maximum fares that can be charged by rural and regional bus services by the Independent Pricing and Regulatory Tribunal in 2018. Which of these statements best describes your knowledge of this happening? (Q42, All respondents)

	Total	Bus users	Non-bus users
I was aware that changes were made to maximum bus fares around 2018	**4%**	21%	3%
I had heard something about bus fares changing in the last few years	**7%**	19%	6%
I was not aware there had been any changes to maximum bus fares recently	**89%**	60%	91%
Sample size	*607*	*27*	*580*

By supplementary samples	Total	Females	Aged 40+	Centrelink /DVA	Disability
I was aware that changes were made to maximum bus fares around 2018	**4%**	4%	4%	4%	4%
I had heard something about bus fares changing in the last few years	**7%**	7%	6%	6%	7%
I was not aware there had been any changes to maximum bus fares recently	**89%**	90%	90%	90%	89%
Sample size	*607*	*421*	*620*	*334*	*152*

By region	Total	Central West	Murray Murrum-bidgee	Northern Rivers	Western	New England	Mid North Coast
I was aware that changes were made to maximum bus fares around 2018	**4%**	5%	2%	5%	1%	3%	4%
I had heard something about bus fares changing in the last few years	**7%**	5%	7%	5%	7%	3%	12%
I was not aware there had been any changes to maximum bus fares recently	**89%**	90%	91%	91%	93%	94%	84%
Sample size	*607*	*100*	*102*	*102*	*100*	*103*	*100*

Appendix A: Questionnaire

Questionnaire prepared by:

THE BEHAVIOURAL INSIGHTS TEAM

The 2020 questionnaire was developed by The Behavioural Insights Team, based in part on a modified version of the 2017 Rural and Regional Transport Survey questionnaire developed by ORIMA and IPART.

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.

Our company has been asked to conduct a 10-15 minute survey to inform decision-making about future regional and rural transport services.

[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, IF NEEDED]: 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 READ OUT]: You may [REMAIN ANONYMOUS/USE A PSEUDONYM] if you would like to. This will not affect the information you provide.

Are you happy to proceed with the interview?

This call is being recorded for coaching and quality purposes – are you happy to have the call recorded?

Demographics

1. What is your age? (dropdown menu)[1]
    a. Under 18 (TERMINATE)
    b. 18-19
    c. 20-24
    d. 25-29
    e. 30-34
    f. 35-39
    g. 40-44
    h. 45-49
    i. 50-54 years
    j. 55-59 years
    k. 60-64 years
    l. 65-69 years
    m. 70-74 years
    n. 75-79 years
    o. 80 years and over

2. What is your gender?
    a. Male
    b. Female
    c. Other
    d. Prefer not to say

3. Are you of Aboriginal and/or Torres Strait Islander origin?
    a. Yes, Aboriginal
    b. Yes, Torres Strait Islander
    c. Yes, both Aboriginal and Torres Strait Islander
    d. No
    e. Prefer not to say

4. What is your postcode? (restrict field to 4 digits)[2]

[1] Automatic exit if age selected is <18

[2] Automatic exit if postcode entered is outside the desired range

5. Which major regional centre do you live in, or closest to? (options from the Areas column that are displayed to the respondent are dependent on the option selected first from the Region column)

Region	Areas
Central West	Bathurst
	Cowra
	Dubbo
	Lithgow
	Mudgee
	Orange
	Parkes
	Other (please specify)
Murray-Murrumbidgee	Albury
	Griffith
	Wagga Wagga
	Other (please specify)
Northern Rivers	Ballina
	Casino
	Lismore
	Tweed Heads
	Other (please specify)
Western	Bourke
	Broken Hill
	Cobar
	Coonamble
	Other (please specify)
New England	Armidale
	Gunnedah
	Moree
	Narrabri
	Tamworth
	Other (please specify)
Mid North Coast	Coffs Harbour
	Grafton
	Port Macquarie
	Taree
	Other (please specify)

6. How far do you live from [insert the Areas option chosen in question 5]?

   a. Less than 5 km

   b. 5-9 km

   c. 10-19 km

   d. 20-49 km

   e. 50 km or more

7. What is your weekly personal income?
    a. Nil income
    b. $1-$399 ($1-$20,799 yearly)
    c. $400-$999 ($20,800-$51,999 yearly)
    d. $1,000-$1,999 ($52,000-$103,999 yearly)
    e. $2,000 or more ($104,000 or more yearly)
    f. Prefer not to answer

8. Which of the following best describes your employment status?
    a. Employed full-time
    b. Employed part-time
    c. Employed casually
    d. Self-employed
    e. Home duties
    f. Unemployed
    g. Student
    h. Retired
    i. Other *(please specify)*

9. Do you receive Centrelink or Department of Veterans' Affairs (DVA) benefits?

	NOW	This time 12 months ago
a. Yes, Centrelink benefits	a	a
b. Yes, DVA benefits	b	b
c. Yes, both Centrelink and DVA benefits	c	c
d. No	d	d

10. Do you have a disability or impairment (such as a physical, intellectual, learning, and/or sensory disability)?
    a. Yes
    b. No
    c. Prefer not to answer

Transport Usage

11. In the last six months, how often have you used each of the following modes of transport to get around within your regional area?

If any of the respondent's answers fall within the grey shaded region, go to **Questions 12 and 13** for community transport (q11_6), **Questions 14 and 15** for courtesy transport (q11_7), **Questions 16 and 17** for taxi (q11_8) and/or **q17a and 17b** for on demand buses (q11_4)
Answers 1 through 4 for Local Bus Service (q11_3) enable **Questions 18-32**
Answer 5 for Local Bus Service (q11_3) enable **Questions 33-41**

	5 or more days a week	2-4 days a week	Weekly	Less often	Don't use
Private vehicle (e.g. car, truck, or motorcycle) as the **driver**	1	2	3	4	5
Private vehicle (e.g. car, truck, or motorcycle) as a **passenger**	1	2	3	4	5
Local bus within your region (i.e. a bus with a fixed route and timetable)	1	2	3	4	5
On-demand bus service – where you can book a bus to pick you up and drop you off where you request	1	2	3	4	5
Coach (i.e. a bus that travels between different regional or urban centres)	1	2	3	4	5
Community transport (i.e. door-to-door transport provided by a local council or community group for people with special transport needs, for which a charge typically applies)	1	2	3	4	5
Courtesy transport (i.e. transport provided by pubs, clubs, or community organisations, which is typically free of charge)	1	2	3	4	5
Taxi	1	2	3	4	5
Ridesharing (e.g. Uber, Lyft)	1	2	3	4	5
Car share (e.g. GoGet, GreenShareCar)	1	2	3	4	5
Hire car with a driver	1	2	3	4	5
Push bike or scooter (to get to and/or from a particular destination, not just for exercise)	1	2	3	4	5
Walking (to get to and/or from a particular destination, not just for exercise)	1	2	3	4	5

12. You said you use sometimes use community transport. How often do you use community transport for each of the following types of journeys?

READ IF REQUIRED: Community transport is door-to-door transport provided by a local council or community group for people with special transport needs, for which a charge typically applies.

	5 or more days a week	2-4 days a week	Weekly	Less often	Don't use
a. Getting to and/or from work	1	2	3	4	5
b. Getting to and/or from school, TAFE, or university	1	2	3	4	5
c. Medical appointments	1	2	3	4	5
d. Shopping trips	1	2	3	4	5
e. Social or recreational activities	1	2	3	4	5
f. Connecting to other modes of transport	1	2	3	4	5
g. Anything else	1	2	3	4	5

IF DON'T USE (CODE 5) TO ALL – GO BACK AND CHECK ANSWER TO Q11G

13. For your most recent journey using community transport, how would you rate it on the following?

	Very Good	Good	Average	Poor	Very Poor	Can't say / Not applicable
Value for money	1	2	3	4	5	9
Punctuality	1	2	3	4	5	9
Journey time	1	2	3	4	5	9
Cleanliness of the vehicle / customer service	1	2	3	4	5	9
Safety	1	2	3	4	5	9
Ease of booking and/or paying	1	2	3	4	5	9
Overall satisfaction	1	2	3	4	5	9

14. You said you sometimes use courtesy transport. How often do you use courtesy transport for each of the following types of journeys?

READ IF REQUIRED: Courtesy transport is transport provided by pubs, clubs, or community organisations, which is typically free of charge.

	5 or more days a week	2-4 days a week	Weekly	Less often	Don't use
a. Getting to and/or from work	1	2	3	4	5
b. Getting to and/or from school, TAFE, or university	1	2	3	4	5
c. Medical appointments	1	2	3	4	5
d. Shopping trips	1	2	3	4	5
e. Social or recreational activities	1	2	3	4	5
f. Connecting to other modes of transport	1	2	3	4	5
g. Anything else	1	2	3	4	5

IF DON'T USE (CODE 5) TO ALL – GO BACK AND CHECK ANSWER TO Q11H

15. For your most recent journey using courtesy transport, how would you rate it on the following?

	Very Good	Good	Average	Poor	Very Poor	Can't say / Not applicable
Value for money	1	2	3	4	5	9
Punctuality	1	2	3	4	5	9
Journey time	1	2	3	4	5	9
Cleanliness of the vehicle / customer service	1	2	3	4	5	9
Safety	1	2	3	4	5	9
Ease of booking and/or paying	1	2	3	4	5	9
Overall satisfaction	1	2	3	4	5	9

16. You said you sometimes use taxis. How often do you use a taxi for each of the following types of journeys?

	5 or more days a week	2-4 days a week	Weekly	Less often	Don't use
a. Getting to and/or from work	1	2	3	4	5
b. Getting to and/or from school, TAFE, or university	1	2	3	4	5
c. Medical appointments	1	2	3	4	5
d. Shopping trips	1	2	3	4	5
e. Social or recreational activities	1	2	3	4	5
f. Connecting to other modes of transport	1	2	3	4	5
g. Anything else	1	2	3	4	5

IF DON'T USE (CODE 5) TO ALL – GO BACK AND CHECK ANSWER TO Q11I

17. For your most recent journey using a taxi, how would you rate it on the following?

	Very Good	Good	Average	Poor	Very Poor	Can't say / Not applicable
Value for money	1	2	3	4	5	9
Punctuality	1	2	3	4	5	9
Journey time	1	2	3	4	5	9
Cleanliness of the vehicle / customer service	1	2	3	4	5	9
Safety	1	2	3	4	5	9
Ease of booking and/or paying	1	2	3	4	5	9
Overall satisfaction	1	2	3	4	5	9

17a. You said you sometimes use on-demand bus services. How often do you use on-demand bus services for each of the following types of journeys?

	5 or more days a week	2-4 days a week	Weekly	Less often	Don't use
a. Getting to and/or from work	1	2	3	4	5
b. Getting to and/or from school, TAFE, or university	1	2	3	4	5
c. Medical appointments	1	2	3	4	5
d. Shopping trips	1	2	3	4	5
e. Social or recreational activities	1	2	3	4	5
f. Connecting to other modes of transport	1	2	3	4	5
g. Anything else	1	2	3	4	5

IF DON'T USE (CODE 5) TO ALL – GO BACK AND CHECK ANSWER TO Q11D

17b. For your most recent journey using an on-demand bus service, how would you rate it on the following?

	Very Good	Good	Average	Poor	Very Poor	Can't say / Not applicable
Value for money	1	2	3	4	5	9
Punctuality	1	2	3	4	5	9
Journey time	1	2	3	4	5	9
Cleanliness of the vehicle / customer service	1	2	3	4	5	9
Safety	1	2	3	4	5	9
Ease of booking and/or paying	1	2	3	4	5	9
Overall satisfaction	1	2	3	4	5	9

Bus Users (as per Question 11)

IF USE LOCAL BUSES – Q11c = 1-4

The next few questions ask about your use of the bus in your local area. By *bus*, we mean a bus with a fixed route and timetable that operates in your local area, not a coach that travels between different regional or urban centres.

18. How often do you use the bus for each of the following types of journeys?

	5 or more days a week	2-4 days a week	Weekly	Less often	Don't use
Getting to and/or from work	1	2	3	4	5
Getting to and/or from school, TAFE, or university	1	2	3	4	5
Medical appointments	1	2	3	4	5
Shopping trips	1	2	3	4	5
Social or recreational activities	1	2	3	4	5
Connecting to other modes of transport	1	2	3	4	5
Other (please specify)	1	2	3	4	5

IF DON'T USE (CODE 5) TO ALL – GO BACK AND CHECK ANSWER TO Q11C

19. When was your most recent bus journey?
    a. Today
    b. Yesterday
    c. Within the last week
    d. Within the last month
    e. Within the last 3 months
    f. Within the last 6 months
    g. More than 6 months ago

IF MOST RECENT BUS JOURNEY MORE THAN 6 MONTHS AGO – GO BACK AND CHECK ANSWER TO Q11C

20. What was the purpose of your most recent bus journey?
    a. Getting to or from work
    b. Getting to or from school, TAFE, or university
    c. Medical appointment
    d. Shopping trip
    e. Social or recreational activity
    f. Connecting to another mode of transport
    g. Other *(please specify)*

21. On your most recent bus journey, did the bus arrive on time?
    a. Yes
    b. No
    c. Don't know/can't remember

22. On your most recent bus journey, did the bus arrive at your destination on time?
    a. Yes
    d. No
    e. Don't know/can't remember

23. On your most recent bus journey, were you able to get a seat immediately upon boarding?
    a. Yes, there were one or more empty seats available
    f. Yes, another passenger offered me their seat
    g. No, I had to wait one or more stops before I got a seat
    h. No, I never got a seat
    i. Don't know/can't remember

24. Did you use a Regional Excursion Daily (RED) ticket on your most recent bus journey?
(Recommend including an example photo if there is a physical version)
    a. Yes (Go to **Question 26**)
    b. No (Go to **Question 25**)
    c. *Don't know / Can't recall*

25. What was the <u>one-way</u> fare on your most recent bus journey?
    a. Nothing, it was free
    d. Less than $2
    e. $2 to less than $5
    f. $5 to less than $10
    g. $10 to less than $20
    h. $20 or more
    i. Don't know/can't remember

25a. If you were to use a more convenient service for the above bus journey, like an on-demand service, how much more would you be willing to pay for this journey?
    a. Nothing ($0)
    b. Less than $2
    c. $2 to $5
    d. $5 or more
    e. Not sure

26. Do you think the fare you paid on your most recent bus journey represented value for money?
    a. Very good value for money
    b. Good value for money
    c. Neither good or poor value for money
    d. Poor value for money
    e. Very poor value for money

The next few questions focus on your general experiences with buses, not just a particular journey.

27. When you choose to take a bus, how important do the following things tend to be to your decision? For trips **using** a bus - would these things be very important, quite important, not very important or not important at all?

RANDOMISE ORDER OF a-g – h ALWAYS LAST	Very important	Quite important	Not very important	Not at all important	Can't say / Not applicable
a. How quickly it can get you there	1	2	3	4	9
b. The cost	1	2	3	4	9
c. Being convenient to catch	1	2	3	4	9
d. Feeling safe to use	1	2	3	4	9
e. Being enjoyable to ride	1	2	3	4	9
f. Being environmentally friendly	1	2	3	4	9
g. How easy or hard it is to get on and off the bus	1	2	3	4	9
h. Other transport options available to you	1	2	3	4	9

27a. Are there any other important reasons why you choose to catch buses around your regional area?

28. And on occasions when you choose **NOT** to take a bus, how important do those things tend to be to your decision?

SAME ORDER AS Q27	Very important	Quite important	Not very important	Not at all important	Can't say / Not applicable
a. How quickly it can get you there	1	2	3	4	9
b. The cost	1	2	3	4	9
c. Being convenient to catch	1	2	3	4	9
d. Feeling safe to use	1	2	3	4	9
e. Being enjoyable to ride	1	2	3	4	9
f. Being environmentally friendly	1	2	3	4	9
g. How easy or hard it is to get on and off the bus	1	2	3	4	9
h. Other transport options available to you	1	2	3	4	9

28a. Are there any other important reasons why you sometimes choose to **not** catch buses around your regional area?

29a. 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?

a. Yes
b. No
c. Can't recall

ASK IF 29a = YES (CODE 1)

29. Think back to the last time you wanted to take the bus but didn't. What did you do instead? Did you... [READ OUT, SINGLE RESPONSE]

a. Didn't go on the journey at all
b. Drove yourself
c. Got a lift from someone else in their personal vehicle
d. Took a taxi
e. Used community transport
f. Used courtesy transport
g. Used ridesharing
h. Used a hire car (with a driver)
i. Rode a push bike or scooter
j. Walked
k. Other (please specify)

30. To what extent do you agree or disagree with the statement: *I would like to take the bus more often*

d. Strongly agree
e. Agree
f. No opinion
g. Disagree
h. Strongly disagree

31. Which of the following changes would make you more likely to take the bus more often? [READ OUT, MULTIPLE RESPONSE]

a. There was a **bus route available** that would take me to my destination
b. The bus was **faster and/or more efficient** (e.g. express buses to get me to my destination more quickly)
c. There were **financial incentives** to take the bus (e.g. fares were cheaper, free or discounted fare after a certain number of trips)
d. The bus was **more convenient** (e.g. buses operated at the times I need to travel, bus stops were closer to my home and/or destination)
e. The bus was **safer and/or more enjoyable** (e.g. drivers who provide better customer service, buses that were cleaner and/or in better repair)
f. The buses in my area ran on **clean and/or renewable energy**
g. I could **access bus information more easily** (e.g. information about fares and timetables, real-time updates to bus delays)
h. I was **no longer able to use my preferred transport option** (e.g. increase in petrol prices, no longer able to get a lift from another person)
i. I could access an "on-demand" bus that I could book in advance
j. Something else (please specify)
k. *NONE / NOTHING* [DO NOT READ OUT]

I'd like you to imagine a new "on-demand" bus service that you can pre-book and which 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.

32. Which of the following would make you likely to use this kind of on-demand bus service? [READ OUT, MULTIPLE RESPONSE]
    a. The service could get me to my destination **quickly and/or efficiently** (e.g. I could book the bus to go there directly as opposed to traveling along a fixed route)
    b. There were **financial incentives** to use the service (e.g. free or discounted fare after every a certain number of trips, off-peak fares at night and on weekends)
    c. It was **convenient** to book and pay for the service (e.g. can book and pay online, or in advance)
    d. The service was **accessible** (e.g. the driver could help me get on/off, I could travel with a mobility aid or pram)
    e. I would **not use** an on-demand bus service
    f. Something else (please specify)
    g. *NONE / NOTHING* [DO NOT READ OUT]

Bus Non-Users (as per Question 11)

IF DO NOT USE LOCAL BUSES – Q11c = 5

I'd like you to imagine a trip you take regularly. This could be a trip to work, to the shops, to a medical appointment, or any other trip you take on a regular basis. Now I'd like you to imagine that you were going to take that trip using your local bus service.

33. What is the approximate distance of that trip?
    a. Less than 5 km
    b. 5-9 km
    c. 10-19 km
    d. 20-49 km
    e. 50 km or more

34. How much do you think that trip would cost if you took the bus?
    a. Less than $2.50
    b. More than $2.50 but less than $5
    c. More than $5 but less than $10
    d. More than $10 but less than $20
    e. More than $20

34a. If you were to use a more convenient service for that trip, like an on-demand bus service, how much more would you expect to pay for the trip than using a usual bus service?

a. Nothing ($0)
b. Less than $2
c. $2 to $5
d. $5 or more
e. Not sure

35. Thinking about information about buses in your area- for example, information about timetables, route maps, types of tickets, cost of tickets, and/or where to buy tickets…

	Yes	No	Unsure / Can't say
a. Do you feel confident that you know where to find this type of information?	1	2	3
b. Have you gone looking for this type of information in the last year or so?	1	2	3
c. Do you think the information available today would be clear and easy to understand?	1	2	3

36. Not counting bus stops that are only used by school buses, how close is the nearest bus stop to your home?

a. Less than a 2 minute walk
b. A 2 to 5 minute walk
c. A 5 to 10 minute walk
d. A 10 to 20 minute walk
e. More than a 20 minute walk
f. I don't know
g. Not applicable / no buses / no bus stops

ASK Q37 IF KNOW LOCATION OF BUS STOP [Q36 = CODE a-e]

37. Thinking about the bus stop closest to your home - do you know where the buses from this stop go?

a. Yes
b. No

38. What are the most important reasons why you choose other modes of transport instead of taking a bus? For you, would the following things typically be very important, quite important, not very important or not at all important reasons for **not** using a bus?

RANDOMISE	Very important	Quite important	Not very important	Not at all important	Can't say / Not applicable
a. How quickly a bus can get you there	1	2	3	4	9
b. The cost	1	2	3	4	9
c. Buses being inconvenient to catch	1	2	3	4	9
d. Buses feeling unsafe to use	1	2	3	4	9
e. Buses not being enjoyable to ride	1	2	3	4	9
f. Buses not being environmentally friendly	1	2	3	4	9
g. How easy or hard it is to get on and off the bus	1	2	3	4	9
h. Other transport options available to you	1	2	3	4	9

38a. Are there any other important reasons why you don't catch buses around your regional area?

39a. To what extent are you open to using buses to get around your regional area in the next six months? Would you say you were [READ OUT, SINGLE RESPONSE]

a. Keen to start using buses
b. Willing to consider using buses
c. Not really fussed one way or the other
d. Not keen to use buses
e. Not willing to even really consider using buses

ASK IF Q39a = CODES 1-4

39. Can you think of a trip where you would consider using a bus?

a. Yes *(please describe)* NOTE: SHOULD BE TRAVEL IN LOCAL AREA OR TO THE NEAREST REGIONAL CENTRE, NOT INTRA-STATE OR INTER-STATE COACH TRAVEL
b. No

ORIMA RESEARCH

40. Which of the following changes would make you likely to take the bus? Please choose as many as apply. [READ OUT, MULTIPLE RESPONSE]

a. There was a **bus route available** that would take me to my destination
b. The bus was **faster and/or more efficient** (e.g. express buses to get me to my destination more quickly)
c. There were **financial incentives** to take the bus (e.g. fares were cheaper, free or discounted fare after a certain number of trips)
d. The bus was **more convenient** (e.g. buses operated at the times I need to travel, bus stops were closer to my home and/or destination)
e. The bus was **safer and/or more enjoyable** (e.g. drivers who provide better customer service, buses that were cleaner and/or in better repair)
f. The buses in my area ran on **clean and/or renewable energy**
g. I could **access bus information more easily** (e.g. information about fares and timetables, real-time updates to bus delays)
h. I was **no longer able to use my preferred transport option** (e.g. increase in petrol prices, no longer able to get a lift from another person)
i. I could access an "on-demand" bus that I could book in advance
j. Something else (please specify)
k. *NONE / NOTHING* [DO NOT READ OUT]

I'd like you to imagine a new "on-demand" bus service that you can pre-book and which 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.

41. Which of the following would make you likely to use this kind of on-demand bus service? [READ OUT, MULTIPLE RESPONSE]

a. The service could get me to my destination **quickly and/or efficiently** (e.g. I could book the bus to go there directly as opposed to traveling along a fixed route)
b. There were **financial incentives** to use the service (e.g. free or discounted fare after every a certain number of trips, off-peak fares at night and on weekends)
c. It was **convenient** to book and pay for the service (e.g. can book and pay online, or in advance)
d. The service was **accessible** (e.g. the driver could help me get on/off, I could travel with a mobility aid or pram)
e. I would **not use** an on-demand bus service
f. Something else (please specify)
g. *NONE / NOTHING* [DO NOT READ OUT]

Change of fares

ASK ALL

42. Changes were made to the maximum fares that can be charged by rural and regional bus services by the Independent Pricing and Regulatory Tribunal in 2018. Which of these statements best describes your knowledge of this happening?
    a. I was aware that changes were made to maximum bus fares around 2018
    b. I had heard something about bus fares changing in the last few years
    c. I was not aware there had been any changes to maximum bus fares recently

Conclusion

That brings us to the end of the interview. Thank you very much for your time and assistance today.

Just in case you missed it my name is [INTERVIEWER NAME] and this interview was conducted by ORIMA Research.

[IF NECESSARY]: If you have any queries about the questions in the survey, Action Market Research has a phone line that you can call if you wish to confirm our credentials. The number is 1800 XXX XXX.

You have the right to access the information that we hold about you as a result of this interview. You may request at any time to have this information de-identified or destroyed.

Thank you, have a great day/afternoon/evening!