Surveying public transport in Adelaide

Andrew Homburg
Patronage Analyst, Ticketing
Passenger Transport Board

Donna Edwards
Ex-Business Manager, Ticketing
Passenger Transport Board

Jack Turner
Manager, Ticketing
Passenger Transport Board

Abstract:
The Passenger Transport Board performs regular and extensive surveys to ensure contracted services for provision of public transport do not fall below set minimum standards and to monitor contract compliance. Surveys record such data as trip length, alightings and boardings, maximum load counts, on-time running, fare-evasion levels, driver courtesy and vehicle standards. At marginal cost the survey also records data on ticketing system reliability and use of service by gender and by people with disabilities.

This paper is based on practical experience and examines how surveys evolved, the methodology used and the impact of the surveys on service contractors. It considers the relevant Australian standard, Interviewer Quality Control Australia and how the PTB performs and advocates its surveys. It also describes some "pitfalls" to avoid.

Contact author:
Andrew Hamborg
Patronage Analyst, Ticketing
Passenger Transport Board
136 North Terrace
ADELAIDE SA 5000

Telephone: (08) 8303 0849
Fax: (08) 8303 0880
Introduction

The Passenger Transport Board (PTB) is responsible for the regulation of all land passenger transport in South Australia. The aims of PTB in introducing competitive tendering of public transport services were to: reverse the trend of patronage decline; reduce operating costs; and, develop a more responsive public transport industry that better meets the community’s access and mobility needs through innovation and service improvement. Competitive tendering resulted in three service providers ('Service Contractors'): Hills Transit, SERCo and TransAdelaide.

The PTB performs regular and extensive surveys to ensure Service Contractors’ services do not fall below set minimum standards and to monitor contract compliance. The survey results can be used by PTB and Service Contractors in the planning and provision of public transport services.

All surveys are now run in accordance with the Market Research Society of Australia (MRS) standard - Interviewer Quality Control Australia (IQCA).

This paper briefly examines how the surveys evolved, the methodology used and the impact of the surveys on PTB management of service contracts. It also considers the IQCA standard and how the PTB performs and advocates its surveys.

Survey evolution and methodology

Adelaide's metropolitan public transport system (commonly known as the Metroticket network) is fully integrated between bus, rail and tram for both private and public operators and for all ticket types, including Multitrip, Daytrip, Section and cash fare tickets, purchased on-board or off-board. In essence the system is multi-modal, multi-operator with an integrated magnetic ticketing system - fare structure and is controlled by one authority under one legislation, the Passenger Transport Act 1994.

The service contracts are based on particular funding formulae, (including a fixed component, an average trip length factor and a patronage element) with service area definition and specifications. The contract conditions are formulated so as to provide incentives and flexibility for operators to excel and to innovate, while providing the PTB with controls to ensure services do not fall below required standards and that overall budgetary constraints can be met.

The PTB’s electronic ticketing system produces various patronage reports, some of which are used in calculating the funding formulae. However, the funding formulae are incomplete without the average trip length factor by Service Contractor area. This is obtained during biannual surveys. The average trip length can vary considerably from contract area to contract area because of the differing geographies and demographics of the contract areas. During the surveys the following additional data is collected:

- vehicle and driver standards in relation to service quality;
- boardings and alightings by trip/route;
- maximum load counts by bus stop;
- adherence to published timetables (ie on-time running);
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- fare evasion levels;
- ticketing equipment performance;
- non-Metroticket free service patronage;
- passengers by gender; and
- on-board sales data.

Figure I includes a sample of the data obtained during the surveys. Appendix I includes sample Audit Sheets which are used to obtain the data.

The surveys also offer the opportunity to check that the ticketing system reporting processes are functioning correctly. Furthermore, both the survey and the ticketing system reports allow PTB to verify and challenge reports provided by Service Contractors.

Since January 1996, five surveys have been conducted. PTB has acquired practical experience from each survey, leading to improvements in subsequent surveys: the survey methodology therefore continues to evolve.

Survey methodology

One to two extensive surveys are conducted each year supported by smaller, more focussed surveys. The extensive surveys, the focus of this paper, are run for a four to six week duration. The sample consists of 50% of all route services supplied within a contract area. Agency personnel are sought by way of tender call. The survey manual and training plan are prepared and Auditors are trained by the PTB in Metroticket network familiarisation and IQCA standards. This incorporates 4 days of intensive theory, assisted by video, simulated audits and in-field practice. Testing of the Auditors also done before surveys commence.

Average Trip Length Sampling and Calculation

To ensure the appropriateness of the average trip length estimate, the surveys were augmented to take account of different day types, as shown in the example for 1996 in Table I.

50% sample of the services operated on a typical day for each day type were surveyed in order to complete a 50% sample of all individual trips by route on a typical day, a number of surveys were conducted over a period of days (of the same day type). The full trips surveyed each day of the period were mutually exclusive. For each trip a number of the survey staff, on board the vehicle, completed a survey form which logged boardings and alightings at each stop along the trip. This data was then fed into a database. A custom written program used this database, together with geographic data bus stops from another database, to calculate the average trip length. Without going into detail, the average trip lengths for three of the contract areas were calculated to be: 8 kms; 11.1 kms; and, 4.9 kms. Subsequent surveys indicate however that trip lengths for individual contract areas remain static over time (unless there are significant vice or demographic changes).
Figure 1: Sample Survey Data
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Table 1  Day Types Surveyed

<table>
<thead>
<tr>
<th>Day Type</th>
<th>Date Surveyed</th>
<th>Number of Days in 1996</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday-Friday</td>
<td>Nov/Dec 1995</td>
<td>201</td>
</tr>
<tr>
<td>Saturday</td>
<td>Nov/Dec 1995</td>
<td>37</td>
</tr>
<tr>
<td>Sunday/Public Holiday</td>
<td>Nov/Dec 1995</td>
<td>43</td>
</tr>
<tr>
<td>Monday-Friday (School Holidays)</td>
<td>January 1996</td>
<td>51</td>
</tr>
<tr>
<td>Saturday (School Holidays)</td>
<td>January 1996</td>
<td>15</td>
</tr>
<tr>
<td>Sunday/Public Holiday (School Holidays)</td>
<td>January 1996</td>
<td>19</td>
</tr>
</tbody>
</table>

Audit Methods

Life in the field for Auditors can be rigorous as the following extract from the Auditor’s Training Manual describes.

"The Wheels On The Bus Go Round And Round"

"Quarter to six in the morning, the sun has yet to rise and a thick fog encloses a bus shelter in the outer eastern suburb of Adelaide. Two huge headlights loom out of the night, a quick glance at a wrist watch and, clutching a clipboard, an Auditor hails down the coming bus. This begins another day in the Passenger Transport Board's (PTB) surveys for our Auditor. Armed with ID (just in case) pen, survey sheets基本 numeric skills (well we hope, given that most of our Auditors are university students) and a good sense of humour, our trusty Auditor begins marking the number of people getting on and off the bus. A simple task with the added complexity of differentiating between concession, full fare, cash and non-cash tickets. Sounds easy, but our Auditor faces a long day of going around and around the network, with the constant fear of missing the next bus, thus falling behind the set schedule organised from the PTB Survey Control Centre. The moon is already high in the night sky when the survey finishes for another day. Tomorrow there will be another route, and it is no surprise our Auditor goes to sleep humming "... the wheels on the bus go round and round, round and round, round and round ..."

Modified for the Passenger Transport Board from an article written by the National Bus Company, 1995)

Survey sheets are checked and all data is input into three separate databases:

- Trip length database (which, despite its name, also includes fare evasion, on-board les, equipment failure and free tickets)
- Audit questionnaire database
- Under database

As are then generated for dissemination to the Service Contractors and PTB’s act Managers

"In accordance with IQCA and to ensure the accuracy of the data, regular auditing of the as occurs. This auditing of Auditors is a three step process.
Homburg, Edwards and Turner

- Desk-top (performed daily),
- Magnetic Ticketing System verification audit, performed twice per week on reports
- In-field inspectors monitoring Auditors twice per survey

This verification procedure is formally in place for every survey. The process is used to confirm that the information collected by the Auditor was as specified in the original job briefing. This verification procedure and its outcomes are compiled and must be made available to the IQCA auditor, and Agency management.

Service Contractor response to surveys

The initial response of some of the Service Contractors’ employees, to the surveys, was hostile. To ease the potential conflict between Service Contractor and Auditors, PTB management advised Service Contractor management prior to the commencement of any survey, that random surveys would be performed over a given period. Not surprisingly ‘the PTB spies are out there’ was a typical response pinned on some depot notice boards. This naturally led to some conflict between a few drivers and Auditors, even though PTB went to considerable lengths to train Auditors to be inconspicuous and warn them of potential animosity. It became evident that PTB had an important consultative role to play to ensure a smoother transition for Service Contractors and to protect the Auditors from potentially escalating harassment. PTB therefore ran a series of seminars at each Depot with drivers, best practise teams and management. The seminars were structured to include:

- an overview of the Passenger Transport Act and the Board’s functions;
- the nature, extent and requirements of service contracts;
- the reasons PTB conducts surveys;
- how PTB conducts surveys;
- a description of the training provided to the survey staff;
- the types of surveys; and
- the reports produced and the dissemination of such

It was evident from those in attendance that much of the information provided at the seminars was being heard for the first time. The contracts were in place and naturally being administered by contract managers, with little understanding by many of the drivers and Depot staff of the history and rationale for why and how surveys were being run. The key message was that there was a common customer. PTB’s role was to monitor and help Service Contractors maintain service standards. Essentially if the customer is satisfied with the service then patronage increases or at least does not decline. More ticket validations results in more contract payments via the funding formula and ultimately more profit for the Service Contractors. An important tool in gaining acceptance of the surveys was PTB’s gaining accreditation to the IQCA standard and ISO9002 Quality Management practices. The July 1998 survey will be conducted as a mystery shopper with no advice to Service Contractors.
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**Interviewer Quality Control Australia (IQCA)**

The Market Research Society of Australia (MRSA) has developed the IQCA standard. The standard and IQCA Accreditation Manual were developed for the benefit of the buyers and suppliers of market research services. It is a requirement of the SA Government that market research must be conducted in line with the IQCA standard. The standard is presented in five self-contained sections so that organisations can select and seek accreditation for their specific research requirements. These include:

- face to face interviewing
  - door to door
- central location
- executive interviewing
- telephone interviewing
- audit and observational studies
- recruitment for qualitative research
- non-field

The standard is designed to ensure that data collected is verified as true and accurate, all collection is supervised and authenticated, staff are properly trained in surveying techniques and that the MRSA Code of Professional Behaviour is adhered to. A copy of the IQCA standard was obtained and survey methods, training procedures and manuals are modified to comply with the Audit and Observational Studies - Section 3 of the standard. PTB received accreditation to IQCA for the 1998 year following an audit conducted in 1997.

**Motion of surveys**

Survey results provide PTB with sufficient information to be able to monitor service performance according to the provisions of the contract. Without such monitoring it would be difficult to determine whether passengers are receiving a quality service, to identify challenge reports by Service Contractors, or to prove potential breaches of contract. Survey reports are copied to each Service Contractor to assist with service improvement and customer service improvement.

Challenges emanating from such avenues as the Minister for Transport, the general public, transport interest groups and media, who may challenge public transport service quality and frequency, are more effectively answered or dealt with because of the reliability and confidence in the data provided through such accredited methods.

PTB is the first transit authority and, to PTB's knowledge, the only government agency in Australia to be accredited to IQCA. Similarly, PTB's Ticketing Unit is the first public transport ticketing authority to be accredited to ISO9002 Quality Management practices. It is thus able to display both the IQCA and ISO9002 'five ticks' relevant correspondence and promotional material.
Homburg, Edwards and Turner

Anecdotal evidence and common pitfalls to avoid

Synchronised time: One of the Auditor’s functions is to report the departure and arrival times of the vehicle at time point locations along the trip. As past surveys have come closer to completion the Auditor’s identity became familiar to the drivers. A problem then arose as some drivers would challenge the Auditor about the correct time. PTB’s remedy was to change over Auditors at regular intervals and to roster Auditors to work within different contract areas within a day or week. Auditors are required to check Telstra time each day prior to commencing work and to call the Survey Supervisor and state name and time to a recorded message.

Phantom reports submitted by Auditors: Occasionally the Auditors just cannot keep up with the data recording required of them. Some have resorted to fudging the figures in order to appear to do the work so that they get their usual pay. Desk top and in-field inspection of Auditors usually manages to find these phantom reports. Our conditions of contract now include a clause that allows PTB to claim the days not worked as well as a fee for the administrative cost of locating the phantom. Training also includes an element about auditing the Auditor. Lost data is recaptured if time permits at the end of the survey.

Not showing for work: The Auditor’s job is not easy as is evident in the drop out rate after a few weeks or even days of being on the network. PTB always has at least 10 fully trained Auditors on stand-by.

Trained but no surveys: Occasionally agency personnel will attend the four days of training and then not undertake the work. It is now a condition of contract that PTB will only pay the Agency for training if the Auditor completes the surveys as contracted.

Media: From time to time public transport enthusiasts take it upon themselves to conduct an audit and present their findings to the media, usually by way of letters to the editor. All the more reason to have the facts and figures available to assist PTB’s Media Adviser in his reply. A sample of the media attention follows:

Extract from “The Advertiser”, 13 September 1997

“Unrealistic timetables for buses in Adelaide”

Are Adelaide’s bus timetables works of fiction? I kept a log of a month’s public transport use. Of 48 buses, only four (8 percent) were on time as per timetable. 43 (90 percent) were late; one was five minutes early.

Thirty buses (63 percent) were five minutes late or more; 10 (21 percent) were 10 minutes late or more. Goodwood Rd buses were an average of eight minutes late.

That’s more than 41/2 hours of my time TransAdelaide wasted in a month – or almost 11/2 working weeks per annum ... Buses simply can’t do the journey in the advertised time.

(Name withheld)
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Excerpt from "The Advertiser", 24 September 1997

"On time"

"I was surprised to read Mr (name withheld) complaint (Letters to the Editor 13 September) that 84 per cent of the buses he was catching in Adelaide were more than five minutes late. His figures are not supported by the Passenger Transport Board's regular audits of bus running times. These audits use a much larger sample than Mr (name withheld) and are therefore a better measure of bus running times across the system.

In the most recent audit during March and April this year, over 4,000 buses were audited. Over 75% of buses left stops within 120 seconds of their scheduled departure times and a further 18% left within five minutes.

Anyone who has driven across town in the peak hours will know that the traffic can often vary and the same trip can often take longer than expected. With this in mind, I believe that bus drivers are all doing an excellent job in ensuring that over 93 per cent of buses are leaving their stops within five minutes of their scheduled departure times.

Recent patronage figures show that people are returning to public transport because of the improved services now being offered by TransAdelaide, Serco and Hills Transit. With a greater use of public transport, traffic congestion will decrease, and that may well lead to even better running times for buses.

Michael Wilson
Chairman
Passenger Transport Board

"Screening for the right Auditors": This is a critical part of running a smooth survey. In the past PTB have used over-zealous Auditors who have tended to 'get out the magnifying glass' on both drivers and vehicles. This confrontationist attitude is to be avoided. PTB now conduct individual interviews with all Auditors to determine if they are right for the job.

Auditors talking to drivers about the content of surveys. This is the opposite end of the spectrum to the over-zealous problem. Auditors who make themselves known and take liking to drivers. This could lead to behaviour change by the driver and a distortion of data. It is difficult to monitor this problem without in-field inspection of the driver.

Auditors identity: For an Auditor to remain inconspicuous for the 6 week survey period requires careful route planning and job allocation, a ticket that validates every time, no black watch and a demeanour and dress that is unlikely to give them away. Quite a challenge for the survey supervisor and Auditor alike. At this point it is fair to say that this has been only partially successful.

And continuing evolution

The cost to run the surveys is approximately $275,000 per annum which represents less than 0.2% of the $220 million cost to fund public transport. Significant amounts of
useful information are collected concurrently during the surveys, which lowers the overall cost of collecting that information in separate surveys.

By the very nature and disciplines of the standard, the IQCA process has assisted in the accurate collection and verification of survey data. Thus it has proved an invaluable tool in dealing with inquiries emanating from such avenues as the Minister for Transport, the opposition, the general public, transport interest groups and of course the media, who may challenge public transport service provision and frequency. PTB has a high degree of confidence in the data and are able to handle these inquiries more effectively. This in turn leads to fewer complaints and lower administrative cost.

The Service Contractors know that the PTB are conducting the surveys and that PTB make a considerable effort to ensure that the information collected is accurate. In turn this information is returned to the Service Contractor to assist in planning of services for its customers. This is the right thing to do for both Service Contractors and customers. The processes are however continually being reviewed with the aim of optimising the effective allocation of resources within PTB. Thus two extensive surveys were conducted per annum when PTB commenced the surveys, largely to ensure the integrity of the trip length factors. This has now changed to one extensive survey per annum and a number of smaller, more focussed surveys. Trip length factors will be calculated less frequently as they have proven to be relatively static, within a contract area, over time.

**Conclusion**

Surveys are a common requirement for most mass transit authorities, even more so today as many of the state government-run public transport monopolies have been divided up and contracted out, shared amongst subsidised-private and government-run organisations. Understandably, in most cases, the government transit operators are contracted along similar terms and conditions as the private transit operators. Inevitably, contract management has become the critical instrument in maintaining service standards.

In PTB's case a further impetus for conducting surveys was the inclusion of a 'trip length factor' in the funding formula. The initial surveys showed that the trip length factor varied widely between contract areas, as would be expected. However the trip length factors have remained static over time and PTB will now cease calculating them unless significant service or demographic changes occur within a contract area. Nevertheless the surveys will continue, in an evolving manner because appropriate mechanisms are required to ensure that the contractors are performing in accordance with performance specifications. Customer feedback is important but this alone is a blunt instrument. According to Barlow and Moller (1996), for every complaint received a further twenty seven do not bother, they simply do not use the service again if it can be avoided. Public transport can ill afford to lose patronage in this manner and must strive to use other methods to monitor and report on contractor performance. Surveys thus form a key role for the Regulator, who is often the funding body and the contract manager, for both private and government mass transit systems. Being accredited to both IQCA and AS/NZS ISO9002 lends credibility to this process.
Acknowledgments

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References


Interview Quality Control Australia Accreditation Manual

Passenger Transport Board Auditors Supervisor Training Manual
### Surveying Public Transport in Adelaide

#### Questionnaire:

<table>
<thead>
<tr>
<th>QUESTION</th>
<th>RESPONSE</th>
<th>FURTHER COMMENTS</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>How often do you use public transport?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frequency of journey</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time of journey</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Further Comments:

- Supplementary questions about public transport habits.
- Detailed feedback on transportation experiences.

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#### Additional Questions:

<table>
<thead>
<tr>
<th>QUESTION</th>
<th>RESPONSE</th>
<th>FURTHER COMMENTS</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfaction with service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delay times</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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#### Additional Notes:

- Data collection methods and survey distribution.
- Analysis and interpretation of survey results.
**TIME EXCEPTION REPORT**

TO BE FILLED OUT FOR IMMEDIATE ACTION

<table>
<thead>
<tr>
<th>Auditor</th>
<th>Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Contract Area</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Route No.</th>
<th>Direction (Up/Down/Loop)</th>
<th>Run No.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Bus Type</th>
<th>Bus Make</th>
<th>Scheduled Time Departing</th>
</tr>
</thead>
</table>

_Did the bus depart/arrive all timepoints at the correct time?_ (use only if the bus is greater than 2 minutes early, or 20 minutes late or DID NOT RUN.)

**COMMENTS:**

<table>
<thead>
<tr>
<th>Schedule depart</th>
<th>at</th>
<th>Actual Depart</th>
<th>* Early/Late</th>
</tr>
</thead>
</table>

Intermediate time check points

<table>
<thead>
<tr>
<th>Stop</th>
<th>Schedule departure time</th>
<th>Actual time</th>
<th>* Early/Late</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Schedule arrive</th>
<th>at</th>
<th>Actual Depart</th>
<th>* Early/Late</th>
</tr>
</thead>
</table>

Stopped at _bus stops along the route of _bus stops. Total number of passengers:

<table>
<thead>
<tr>
<th>Traffic Conditions</th>
<th>Weather Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Heavy</td>
<td>□ Medium</td>
</tr>
<tr>
<td>□ Fine</td>
<td>□ Overcast</td>
</tr>
<tr>
<td>□ Light</td>
<td>□ Rain</td>
</tr>
</tbody>
</table>

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**Apparent Reasons for Early/Late Running**

<table>
<thead>
<tr>
<th>Early</th>
<th>Late</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Driver attempted to maintain schedule by □ Prolonging Stops</td>
<td>□ Driver attempted to maintain schedule by □ Driving quickly between stop</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Early**

- □ 1 min
- □ 2 min
- □ 3 min

**Late**

- □ Other
- □ Road works on route
- □ Problems with unruly passengers

**Other reason for *early/late running**

---

Forward to Manager, Contracts.

Signed: ___________________________ Date: _____________

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*del*
### DRIVER SAFETY EXCEPTION REPORT
**ONLY TO BE FILLED OUT FOR IMMEDIATE ACTION**

<table>
<thead>
<tr>
<th>Auditor</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
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</tr>
<tr>
<td>Route No.</td>
<td>Direction (Up/Down/Loop)</td>
</tr>
<tr>
<td>Bus Type</td>
<td>Bus Make</td>
</tr>
</tbody>
</table>

Describe the driver's approach to safety in the following areas:

- a. smooth ride
- b. approach to kerb
- c. compliance with road rules
- d. ensured passengers disembarked safely
- e. ensured passengers are seated before driving

<table>
<thead>
<tr>
<th>Comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Signed .......................... Date .........

Forward to Manager. Contracts

<table>
<thead>
<tr>
<th>Signed</th>
<th>Date</th>
</tr>
</thead>
</table>
Audit Gender Sheet

PLEASE INDICATE THE NUMBER OF BOARDINGS BY GENDER AND

### MALES

<table>
<thead>
<tr>
<th>STOP No.</th>
<th>0 - 4</th>
<th>5 - 18</th>
<th>19 - 45</th>
<th>46 - 59</th>
<th>60+</th>
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</table>

### FEMALES

<table>
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<tr>
<th>STOP No.</th>
<th>0 - 4</th>
<th>5 - 18</th>
<th>19 - 45</th>
<th>46 - 59</th>
<th>60+</th>
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</table>

**TOTAL**

### COMBINED MALE/FEMALE TOTAL BY AGE

<table>
<thead>
<tr>
<th></th>
<th>0 - 4</th>
<th>5 - 18</th>
<th>19 - 45</th>
<th>46 - 59</th>
<th>60+</th>
</tr>
</thead>
</table>

**TOTAL (excluding Age 0 - 4)**

<p>| | |</p>
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<th></th>
</tr>
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</table>

Signed: 682

Date: ____________________________

Conducted according to the ICC/USOM AI