

Tram Passenger Survey Autumn 2016

All Party Parliamentary Light Rail Group – 24 October 2017

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What I'll be talking about

- Transport Focus – who we are and what we do
- Measuring tram passenger satisfaction - TPS
- How does tram passenger satisfaction compare to other modes?

Transport Focus

- Independent consumer watchdog for Britain's rail passengers and bus, coach and tram passengers in England outside of London
- Latest role representing users of England's strategic road network
- Aim is to make a difference and be useful
- Robust, evidenced based research and policy
- Represent users' priorities and experiences...pro consumer!

Background to the 2016 survey

The Tram Passenger Survey (TPS)

- Provides a consistent, robust measurement of passenger satisfaction with tram services in Britain
- Informs our understanding of barriers to (greater) tram use, how to encourage greater use, and how to improve the passenger experience
- Allows for comparisons to be made with passenger experiences on buses and trains
- In 2016 covered tram services in Manchester, Birmingham, Blackpool, Edinburgh, Nottingham and Sheffield



The survey method







Passengers are approached while making a journey; they answer the survey about that journey specifically

The questionnaire is self-completion, with passengers offered a choice of online or paper

Interviewers approached passengers on all days of the week between 6am and 10pm, between **26 September and 4 December 2016**

5397 surveys were completed across the six networks

The networks in context

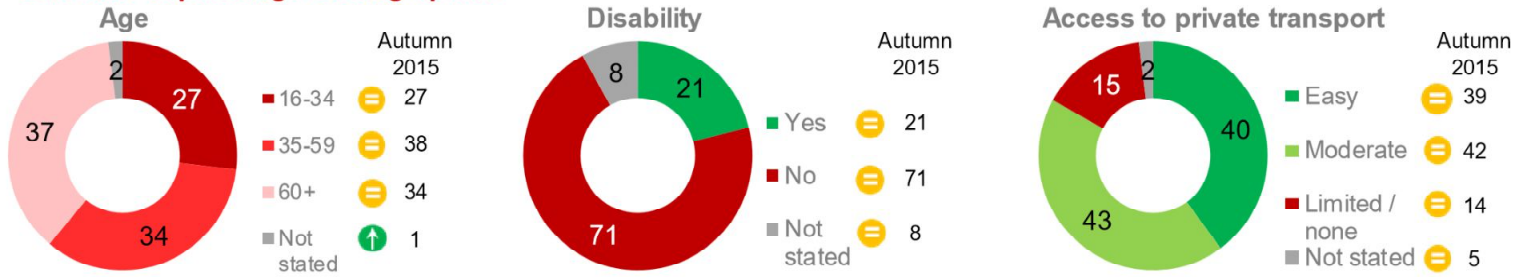
	The Network	Passenger Journeys	Ticket Purchasing	Information at stops	Frequency	Engineering disruptions/other notes
	1 line 38 stops 11 miles	4.9* million	<ul style="list-style-type: none"> ✗ TVMs at stops ✓ Conductors on board 	<ul style="list-style-type: none"> ✓ Info boards at stops (TTs, fares) ✗ Passenger Info Displays 	Mon-Sat: every 15-30 mins Sun: 20-30 mins	<ul style="list-style-type: none"> • Blackpool illuminations 1 Sep to 5 Nov 2016 • Heritage trams operate bank holidays, weekends and summer; not covered in this research • No significant issues affected fieldwork
	1 line 16 stops 8.7 miles	5.5** million	<ul style="list-style-type: none"> ✓ TVMs at stops ✗ Conductors on board 	<ul style="list-style-type: none"> ✗ Info boards at stops (TTs, fares) ✓ Passenger Info Displays 	Mon-Sat: every 8-10 mins Sun: 12-15 mins	<ul style="list-style-type: none"> • Network opened 31 May 2014 • No significant issues affected fieldwork
	7 lines 93 stops 57 miles	36** million	<ul style="list-style-type: none"> ✓ TVMs at stops ✗ Conductors on board 	<ul style="list-style-type: none"> ✓ Info boards all stops (TTs, fares) ✓ Passenger Info Displays <i>(Not all stops on Bury and Altrincham lines)</i> 	Mon-Sat: every 6-12 mins Sun: 12-15 mins	<ul style="list-style-type: none"> • Airport line opened late 2014, covered for first time in 2015 • Exchange Square and link with Victoria opened in December 2015 • Increasing use of double carriage trams
	1 line 26 stops 13 miles	6.1** million	<ul style="list-style-type: none"> ✓ TVMs at stops ✓ Conductors on board 	<ul style="list-style-type: none"> ✓ Info boards at some stops (TTs, fares) ✓ Passenger Info Displays 	Mon-Sat: every 6-15 mins Sun: 15 mins	<ul style="list-style-type: none"> • Network extension to Grand Central (New Street Station) opened on 30 May 2016 and was included in the TPS 2016 • No significant issues affecting fieldwork
	2 lines 50 stops 20 miles	12.2* million	<ul style="list-style-type: none"> ✓ TVMs at stops ✗ Conductors on board 	<ul style="list-style-type: none"> ✓ Info boards all stops (TTs, fares) ✓ Passenger Info Displays 	Mon-Sat: every 3-15 mins Sun: 5-15 mins	<ul style="list-style-type: none"> • No significant issues affecting fieldwork
	3 lines 48 stops 18 miles	11.6* million	<ul style="list-style-type: none"> ✗ TVMs at stops ✓ Conductors on board 	<ul style="list-style-type: none"> ✓ Info boards at stops (TTs, fares) ✗ Passenger Info Displays 	Mon-Sat: every 5-20 mins Sun: 10-20 mins	<ul style="list-style-type: none"> • No significant issues affecting fieldwork

*Source: Department for Transport, Passenger journeys on light rail and trams by system in England, 2015/16

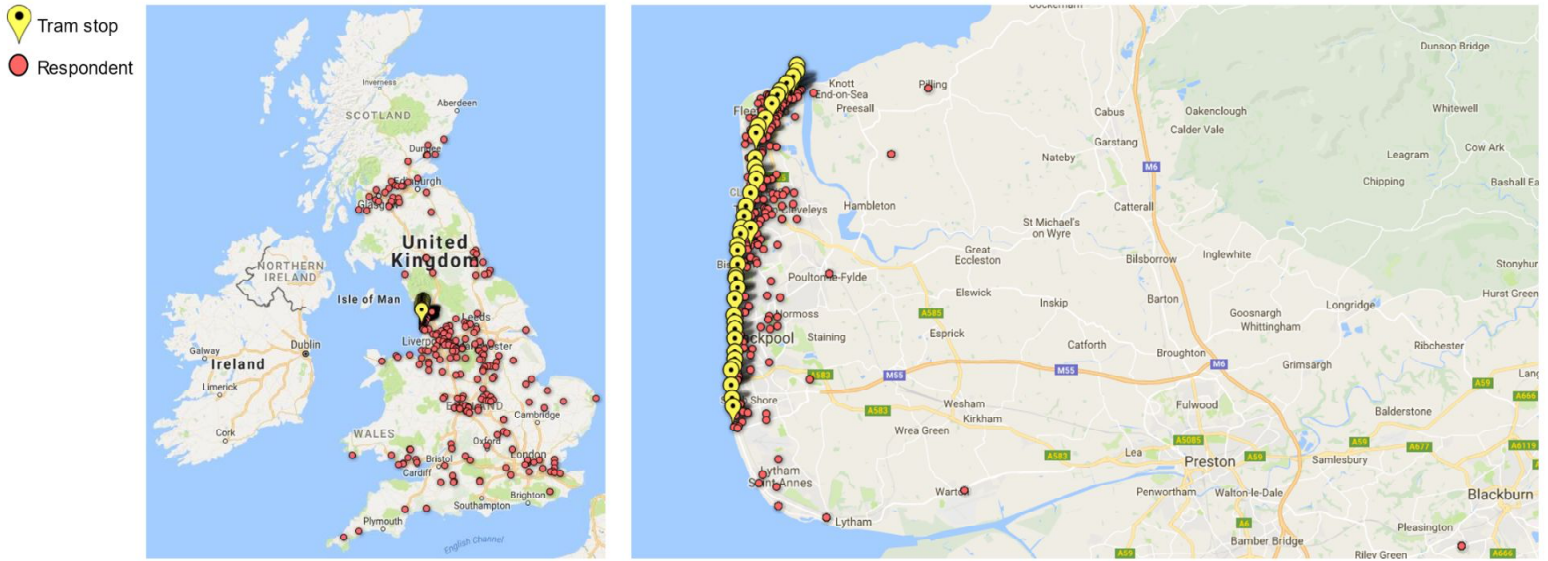
**Source: Direct from operator

Blackpool passengers: summary

Overview of passenger demographics



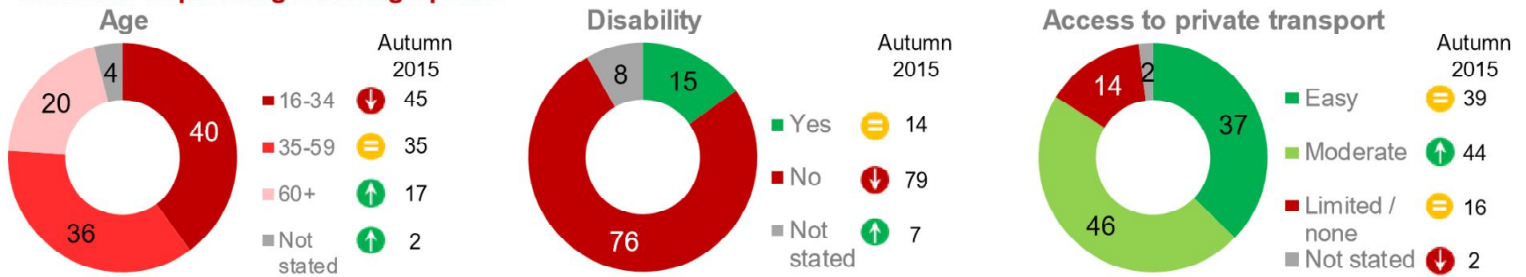
Passengers' postcodes relative to tram network



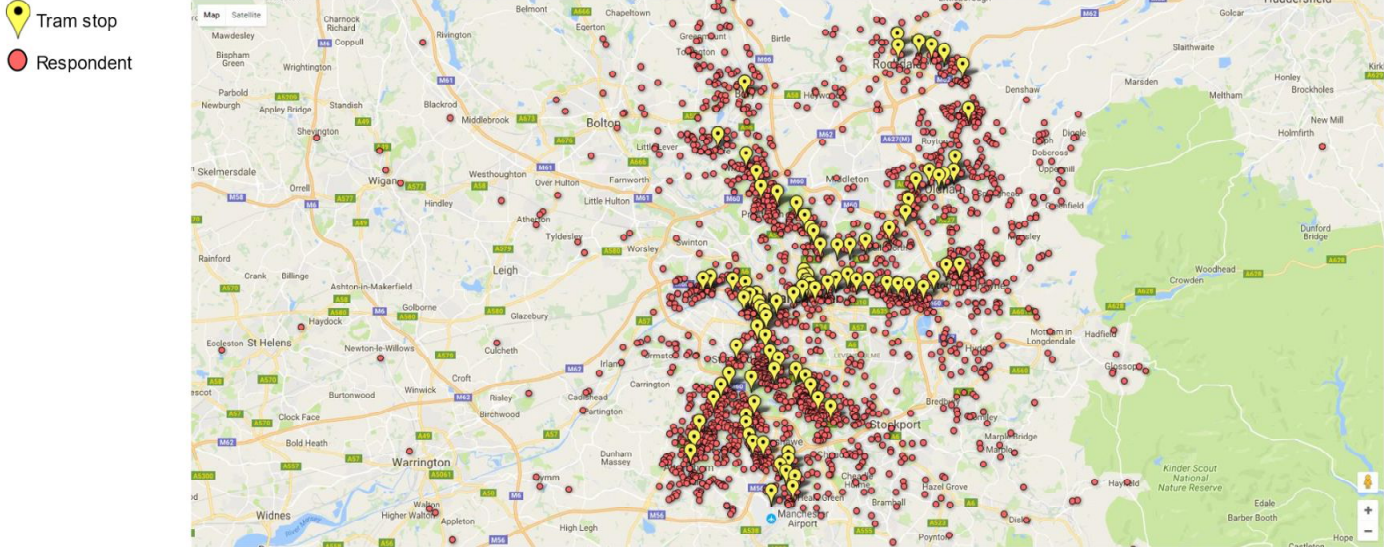
- ↑ Statistically significant increase since 2015
- ⊞ No change
- ↓ Statistically significant decrease since 2015

Metrolink passengers: summary

Overview of passenger demographics

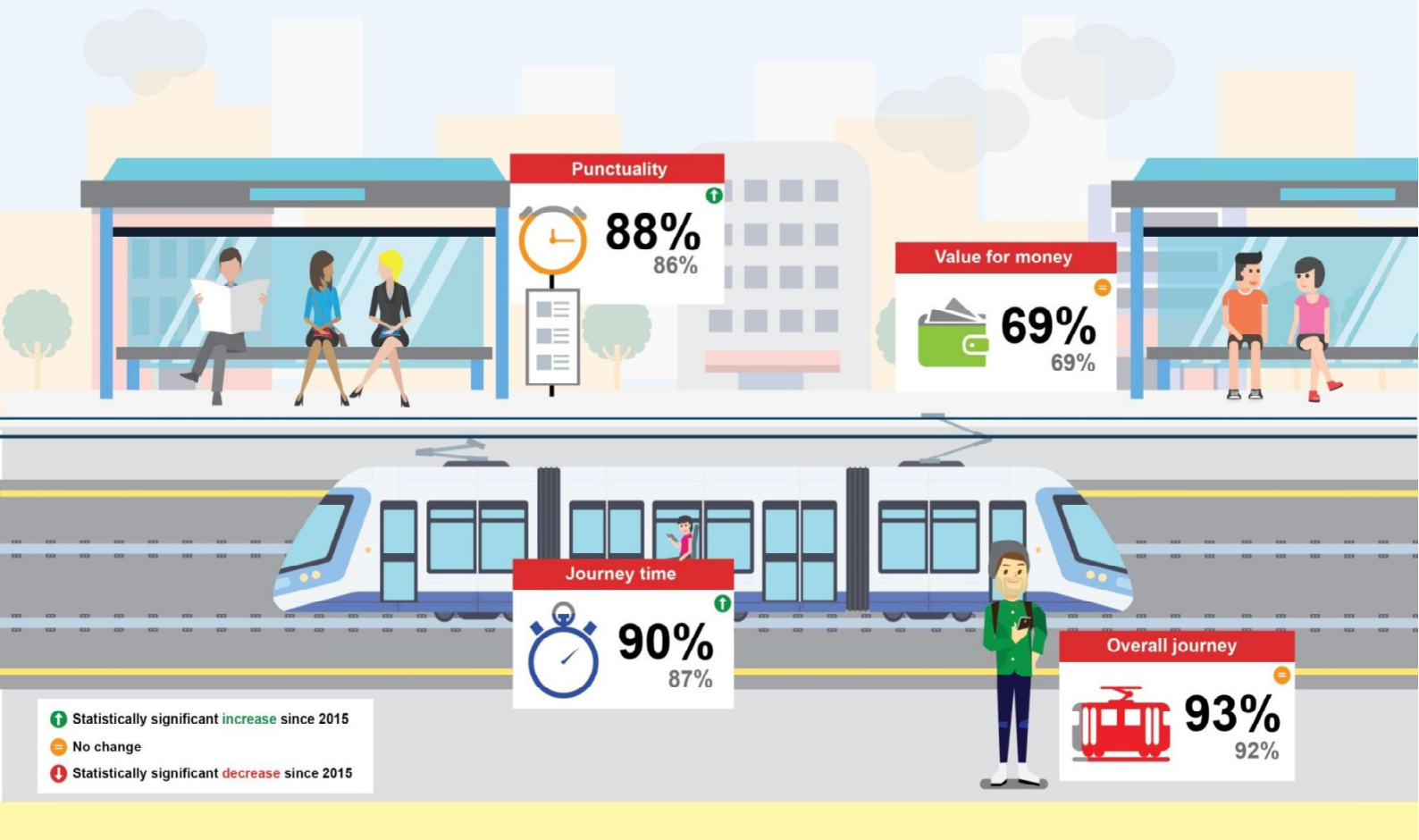


Passengers' postcodes relative to tram network



- ↑ Statistically significant increase since 2015
- = No change
- ↓ Statistically significant decrease since 2015

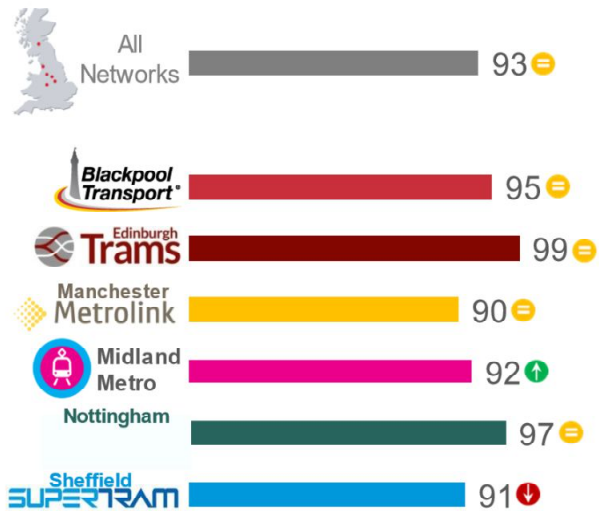
Key performance measures for all networks 2016



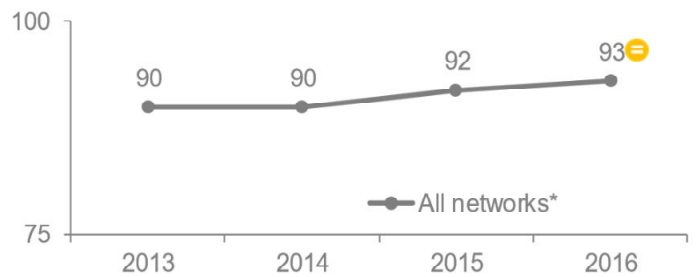
Figures shown are total very or fairly satisfied.
Last year's figure is shown in grey

Passenger satisfaction with the journey overall

 Overall journey satisfaction in 2016 (%)



 Overall journey satisfaction trend (%)

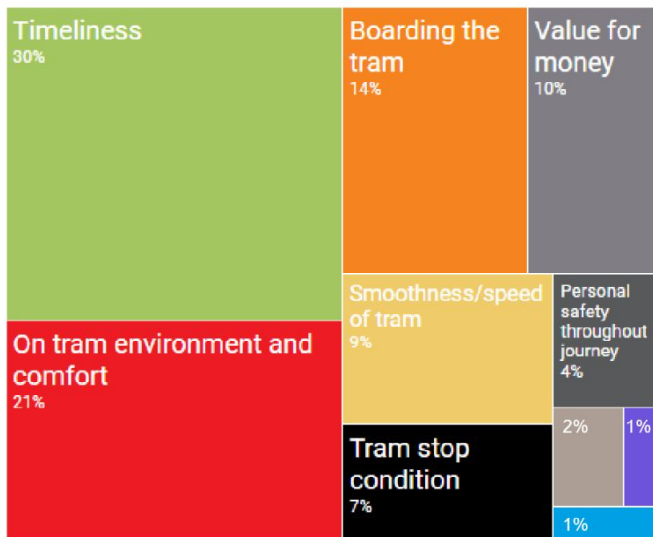


*The 2013 survey did not include Edinburgh Trams

What makes a satisfactory or great journey?

The top factors linked to overall journey satisfaction*

What makes a satisfactory journey?



What makes a great journey?



- Information throughout journey
- Cleanliness and condition of the tram
- Access to the tram stop

*Key Driver Analysis looks at fare-paying passengers' overall journey satisfaction response and their response to the 25 individual satisfaction measures in the survey (including value for money), which have been grouped into 10 themes based upon a statistical analysis of the responses.

The left hand chart shows which themes most differentiate between those not satisfied and satisfied overall – making a journey 'satisfactory'.

The right hand chart shows which themes most differentiate between those fairly and very satisfied overall – making a 'great' journey.





The analysis combines data from 2015 and 2016 surveys to increase robustness. It also excludes satisfaction measures relating to tram staff; due to differences in staff availability across the networks not all TPS questionnaires feature questions about tram staff. In order to run the analysis in a consistent and practical manner all staff measures have been excluded.

- ↑ Statistically significant increase since 2015
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How the top factors linked to overall journey satisfaction performed in 2016











What makes a satisfactory journey?

Timeliness

- 88%   Length of time waiting for the tram
- 88%   Punctuality

What makes a great journey?

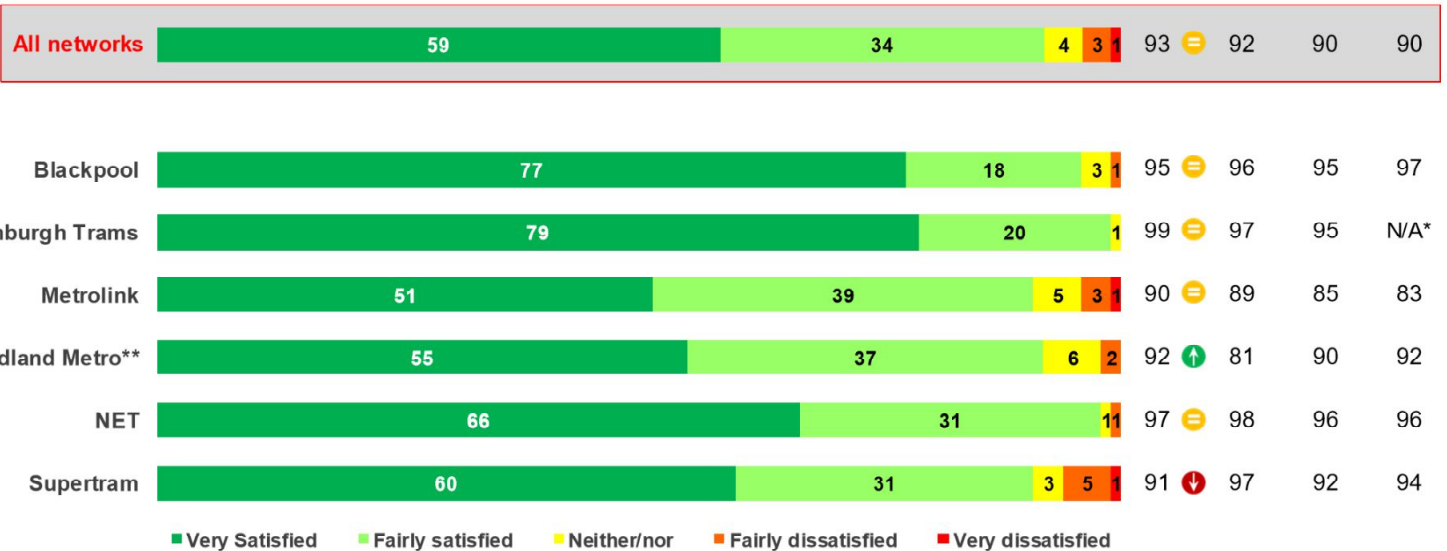
On tram environment and comfort

- 78%   Availability of seating or space to stand
- 77%   Comfort of the seats
- 73%   Amount of personal space
- 81%   Provision of grab rails
- 83%   Temperature

Overall satisfaction (%)

Total fairly/very satisfied

Autumn 2016 Autumn 2015 Autumn 2014 Autumn 2013



*The 2013 survey did not include Edinburgh Trams

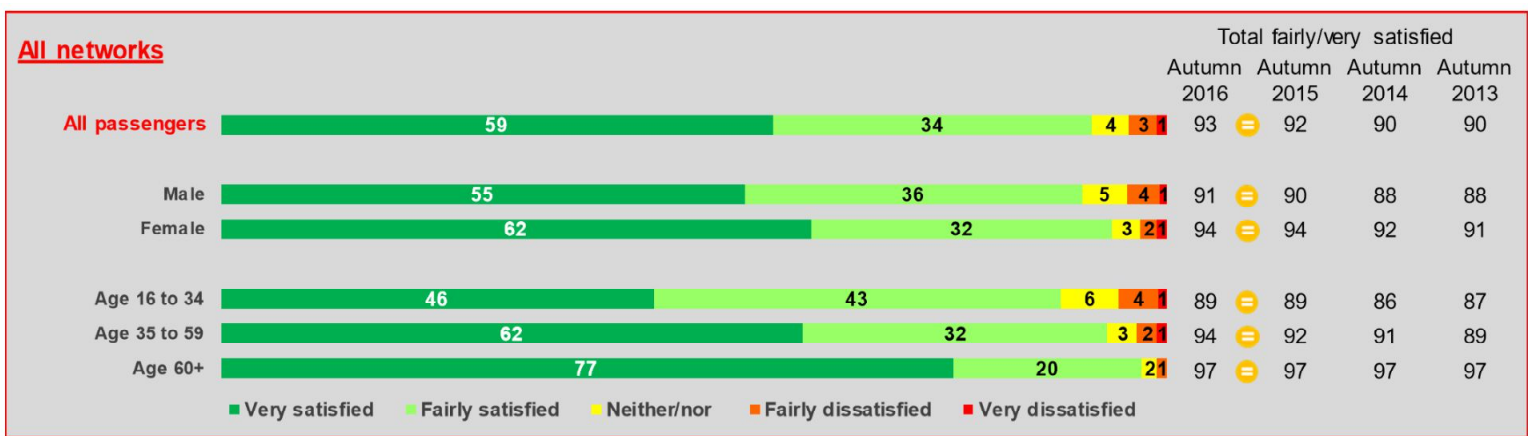
**See page 17 for further detail on 2015 comparison for Midland Metro

Q. Overall, taking everything into account from the start to the end of this tram journey, how satisfied were you with your tram journey today?

Base: All passengers – 5281 (All networks), 569 (Blackpool), 515 (Edinburgh Trams), 3022 (Metrolink), 607 (Midland Metro), 289 (NET), 279 (Supertram)

- ↑ Statistically significant increase since 2015
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- ↓ Statistically significant decrease since 2015

Overall satisfaction (%) – by gender and age

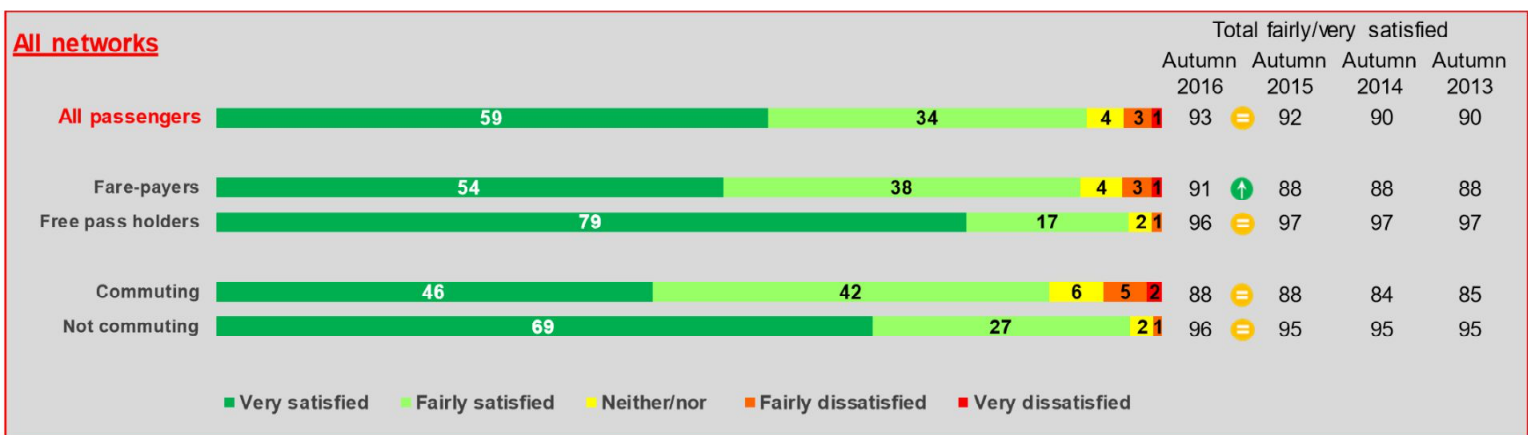


Q. Overall, taking everything into account from the start to the end of this tram journey, how satisfied were you with your tram journey today?

Base: All passengers – 5281

- ↑ Statistically significant **increase** since 2015
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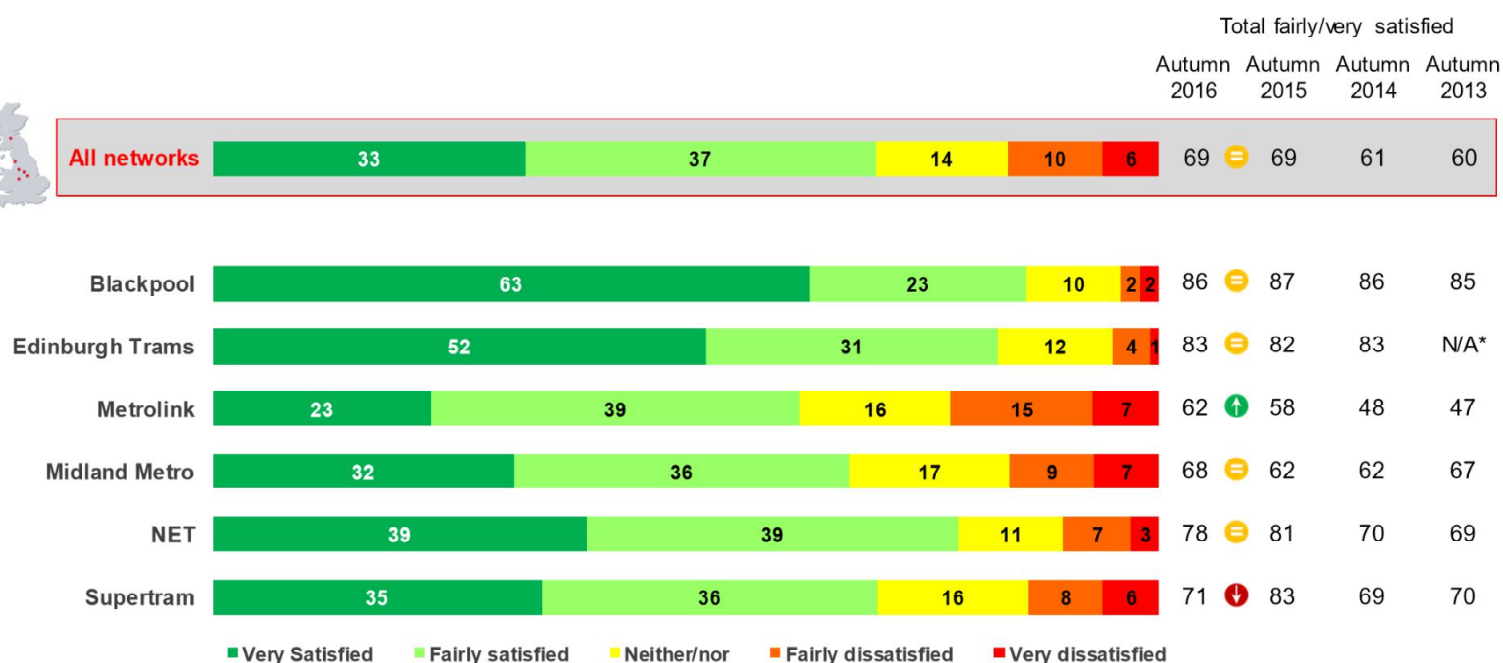
Overall satisfaction (%) – by passenger type



Q. Overall, taking everything into account from the start to the end of this tram journey, how satisfied were you with your tram journey today?
 Base: All passengers – 5281

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Value for money (%) – fare-payers only



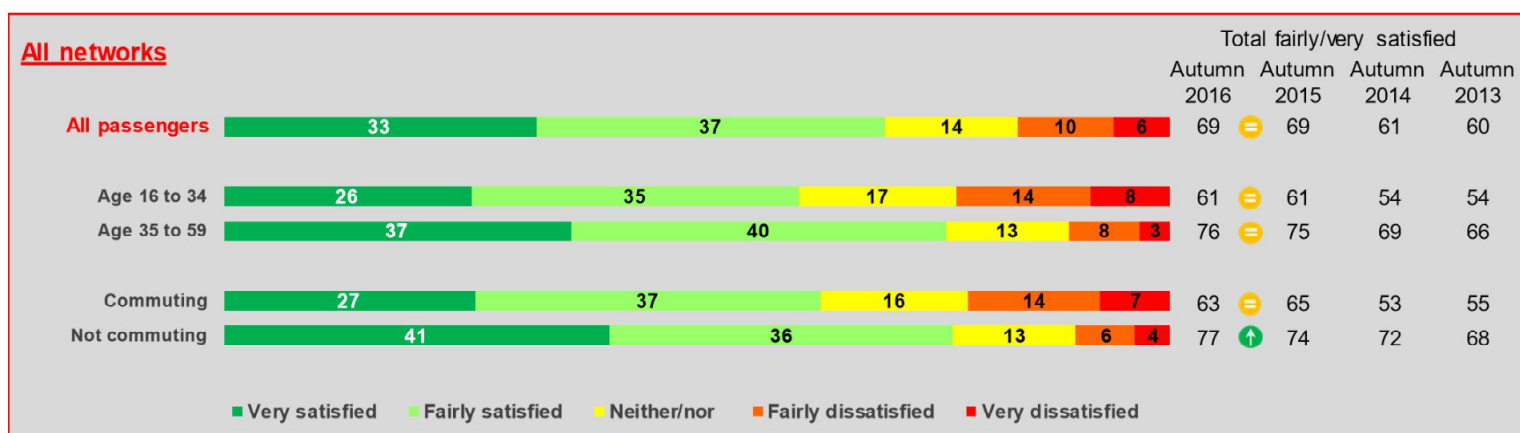
*The 2013 survey did not include Edinburgh Trams

Q. How satisfied were you with the value for money of your journey?

Base: All fare-paying passengers – 3715 (All networks), 448 (Blackpool), 431 (Edinburgh Trams), 1978 (Metrolink), 516 (Midland Metro), 174 (NET), 168 (Supertram)

- ↑ Statistically significant **increase** since 2015
- = No change
- ↓ Statistically significant **decrease** since 2015

Value for money (%) – fare-payers only – by age and passenger type



Q. How satisfied were you with the value for money of your journey?

Base: All fare-paying passengers – 3715

- ↑ Statistically significant **increase** since 2015
- = No change
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Waiting at the stop: summary



Nottingham

Sheffield

Satisfaction with the stop:

Overall satisfaction with the stop **90**

91 =

97 =

89 =

88 =

94 =

89 ↓



Waiting times:

Satisfaction: expected waiting time **88%**

Expected wait time **6.7 mins ↓**

Actual reported wait time **5.6 mins ↓**

Checking tram information:

Passengers who checked tram time **78% =**




Info sources used before arriving at stop **Mixed; Disruption info online the most common source**


Info sources used at stop **66% electronic display**

Among those that didn't check... **78% knew service frequent**









- Statistically significant **increase** since 2015
- No change
- Statistically significant **decrease** since 2015

The tram: summary



 All Networks		 All Networks		 All Networks	
Start of journey		On board		The driver	
Route info on tram	91	Interior cleanliness	89	Appearance	92
Exterior cleanliness	91	Info on board	86	Greeting	83 =
Ease getting on	94	Seat/standing space	78	Helpfulness/attitude	86 =
Time taken to board	95	Seat comfort	77	Safety of driving	92 ↓
		Personal space	73	Smoothness journey	81 =
		Provision grabrails	81		
		Temperature	83		
		Personal security	85		

 Statistically significant **increase** since 2015
 No change
 Statistically significant **decrease** since 2015

Opinion of trams in the local area: summary

	 All Networks				
	Autumn 2016		Autumn 2015	Autumn 2014	Autumn 2013
General opinion of services in area:					
Ease of buying tickets	 86	=	85	84	89
Punctuality	 83	=	82	79	75
Frequency	 84	=	82	80	78
Range of tickets available	 77	=	76	71	N/A*
Range of payment options available	 78		N/A*	N/A*	N/A*
Ease of getting to local amenities	 87	=	87	86	86
Connections with other modes	 87	=	88	86	87

*Not asked before 2016

-  Statistically significant **increase** since 2015
-  No change
-  Statistically significant **decrease** since 2015

Summary of key findings (1)

- Across the six networks surveyed, overall journey satisfaction has reached its highest point, at 93 per cent
 - Satisfaction is high across all networks (with all reaching at least 90 per cent this time), although ratings of Sheffield Supertram have decreased significantly since 2015
 - Edinburgh Trams has achieved the best ever results for any network surveyed as part of the Tram Passenger Survey, with a near perfect score
 - Midland Metro's work on the extension to Birmingham New Street station caused a sharp decline in passenger satisfaction in 2015 due to the severe service disruption, so the recovery in its overall results this time is welcome
- The key factor which makes tram journeys satisfactory is the timeliness of trams. Satisfaction with both punctuality and waiting times have increased significantly
- The key factor which makes passengers 'very' rather than 'fairly' satisfied with tram journeys is the environment and comfort on board. Attributes relating to this have remained relatively consistent compared to 2015, with passenger satisfaction changing significantly for only one on board factor: amount of personal space, which decreased significantly to 73 per cent – an indication of the challenge facing the networks when demand for journeys rises
- Amongst fare-paying passengers 69 per cent were satisfied with the value for money of their journey, the same as in 2015

Summary of key findings (2)

- Whilst overall journey satisfaction was high, a third of passengers did spontaneously suggest an improvement to their journey
 - These varied by network but mostly concerned the design, comfort and condition of trams (particularly for Midland Metro and Nottingham)
 - Other improvements frequently mentioned included the seating and capacity on board trams (mostly for Metrolink) and the fares and tickets available (particularly in Edinburgh)
- 8 per cent of passengers experienced a delay to their journey in 2016 (2015: 9 per cent), and when delayed the average length of delays was 10 minutes (2015: 12 minutes)
- Only 7 per cent of passengers were troubled by the behaviour of other passengers. When there was cause for concern this related mostly to rowdy behaviour
- When thinking more generally about trams in the local area (rather than a specific journey) passengers are generally satisfied with a range of factors, including connections with other modes of transport, ease of buying tickets, punctuality and frequency of trams. The slightly lower levels of general satisfaction (compared to satisfaction with a specific journey) indicate that there is still room for improvement and that not all journeys meet the same experience as that measured in the survey

Trams continue to outperform both trains and buses, overall and on most key measures, as captured in our other core passenger surveys, NRPS and BPS



Autumn 2016 satisfaction scores (%): bus, train and tram – all passengers	Bus (BPS)	Train (NRPS)	Tram (TPS)
Overall satisfaction	87	81	93
Punctuality	73	73	88
Value for money	65	47	69
Overall satisfaction with bus stop/station/tram stop	79	81	90
Personal safety at bus stop/station/tram stop	78	73	86
Information provided at bus stop/station/tram stop	73	82	81
Helpfulness and attitude of staff on board*	73	64	86
Availability of seating or space to stand	86	66	78
Personal security while on bus/train/tram	84	78	85
Cleanliness of the inside of the bus/train/tram	79	77	89

* Question not asked on Metrolink

We see a similar pattern for commuters across the three transport modes, with trams outperforming both trains and buses



Autumn 2016 satisfaction scores (%): bus, train and tram – commuters	Bus (BPS)	Train (NRPS)	Tram (TPS)
Overall satisfaction	81	74	88
Punctuality	66	62	83
Value for money	63	33	63
Overall satisfaction with bus stop/station/tram stop	76	77	89
Personal safety at bus stop/station/tram stop	74	71	83
Information provided at bus stop/station/tram stop	68	78	76
Helpfulness and attitude of staff on board*	68	56	81
Availability of seating or space to stand	82	55	66
Personal security while on bus/train/tram	80	73	81
Cleanliness of the inside of the bus/train/tram	74	72	87

* Question not asked on Metrolink

Thank you



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