



# Tram Passenger Survey

Key findings  
Autumn 2015





Jeff Halliwell

# Foreword

Now in its third year, our Tram Passenger Survey has covered passengers' views of their journey in six network areas in Britain. For the second time this also includes Edinburgh Trams.

**T**his year we spoke to 5707 passengers about the tram journey they had just made. It is good to report overall passenger satisfaction at 92 per cent across the surveyed areas and with high levels of very satisfied passengers in Edinburgh, Blackpool, Nottingham and Sheffield. Passengers' rating of value for money of their journey across the networks has seen a significant improvement, now at 69 per cent.

There has also been a significant increase in satisfaction in Manchester with the Metrolink network. This reflects continued investment in the system with, for example, additional trams being used to tackle previous passenger concerns with overcrowded services.

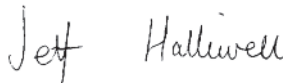
In places like Nottingham, Sheffield, Manchester and the West Midlands there has been a lot of engineering work to expand, improve and renew existing tram systems. This welcome investment can of course impact on passengers' daily journeys with disruption to services, bus replacement services and unexpected delays to journeys caused by the works. It is vital that operators and authorities work hard to provide good quality passenger information during delays and disruption.

The team at Transport Focus has presented these findings to the operators and transport authorities

covered by the survey. We work collaboratively with decision makers to identify areas of passenger concern, and develop action plans to resolve them.

We are grateful for the co-operation of the six networks covered by the survey, especially Edinburgh Trams for funding its participation, and Transport for Greater Manchester (TfGM), Centro (West Midlands) and Blackpool Transport for contributing to the funding. This has enabled us to provide a rich resource of passenger views to help identify and secure better services in the future.

Through our National Rail Passenger Survey, Bus Passenger Survey and Tram Passenger Survey we now speak to over 100,000 passengers each year. Speaking to road users through the upcoming Strategic Roads User Survey will also help to build a wider picture of satisfaction, boosting the voice of transport users.



Jeff Halliwell  
Chair  
Transport Focus

# Key findings

- Across all six tram networks, **overall satisfaction** with the journey has increased significantly since 2014, from 90 to 92 per cent. The proportion of passengers saying they were 'very satisfied' with their journey has also increased significantly, from 53 per cent in 2014 to 57 per cent in 2015.
- The largest increases in overall journey satisfaction were on the Manchester Metrolink and Sheffield Supertram services (increasing from 85 to 89 per cent and 92 to 97 per cent respectively).
- Satisfaction is high across all networks, although ratings

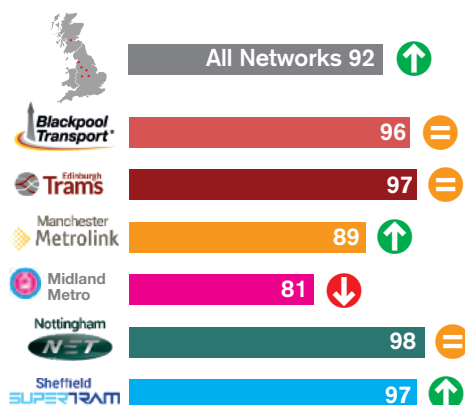


- of Midland Metro have decreased significantly since 2014 (to 81 per cent). This decrease is likely to have been influenced by improvement works taking place on the Metro network during the fieldwork period.
- The key factors for a satisfactory tram journey are the length of time the journey takes, perceived value for money and punctuality. Satisfaction with all three of these factors has increased significantly compared to 2014.
- Satisfaction with the length of time the journey takes has increased significantly since 2014 from 84 per cent to 87 per cent, driven by significant increases in Blackpool and Sheffield.
- Among fare-paying passengers, 69 per cent were satisfied with the **value for money** of their journey. This is a significant increase since 2014 (61 per cent).
- When evaluating whether their journey represented value for money, passengers' main criteria were the cost for the distance travelled and the cost of the tram versus other modes of transport.
- 86 per cent of passengers were satisfied with the **punctuality** of the specific tram service on the day of interview, although nine per cent did experience a delay to their journey. Delays were slightly more common on Midland Metro and Metrolink (14 per cent and 12 per cent respectively).
- When thinking more generally about trams in the local area, rather than a specific journey, passengers are generally satisfied with a range of features, including connections with other modes of transport (88 per cent satisfied), ease of buying tickets (85 per cent), punctuality (82 per cent) and frequency of trams (82 per cent).
- Whilst overall journey satisfaction was high, 36 per cent of passengers did spontaneously **suggest an improvement** to their journey. These varied by network but mostly concerned the ability to get a seat and capacity issues, as well as improvements to tram stops.
- Other improvements frequently mentioned included more frequent trams (especially in Manchester), better ticket facilities (higher in Edinburgh) and better information at tram stops (most important to passengers in Manchester).
- Seven per cent of passengers were troubled by **anti-social behaviour** of other passengers. When there was cause for concern this related mostly to rowdy behaviour.
- The **profile** of tram passengers remains quite young, with 29 per cent aged 16 to 25 years. Blackpool has the oldest profile with over a third (34 per cent) aged 60 or over.
- Almost half (49 per cent) of all passengers were **using the tram** to commute to/from work or education.

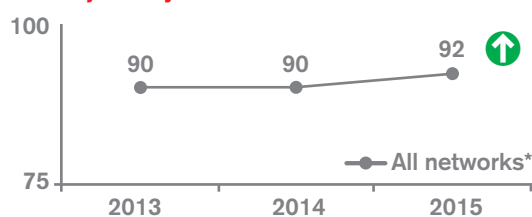


## Passenger experience: a snapshot

### Overall journey satisfaction: 2015



### Overall journey satisfaction: trend



\*The 2013 survey did not include Edinburgh Trams



Statistically significant increase since 2014



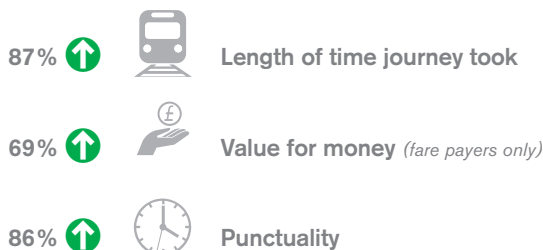
No change



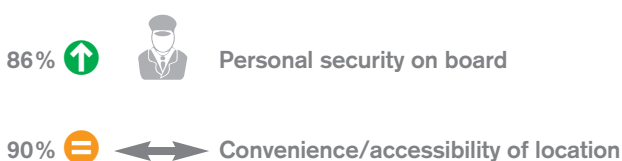
Statistically significant decrease since 2014

### The top factors linked to overall journey satisfaction\* and how they performed in 2015

For a satisfactory journey (very/fairly satisfied):



...and additional factors linked to a very satisfactory journey:



\*Combines data from 2014 and 2015 surveys to increase robustness

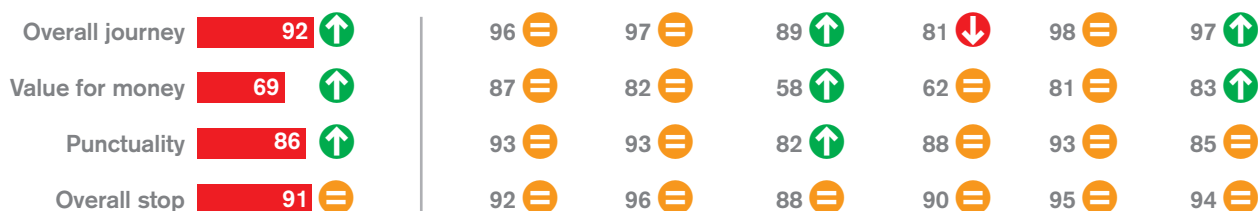
## Passenger experience in 2015: across the networks



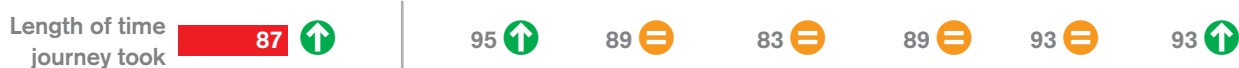
All Networks



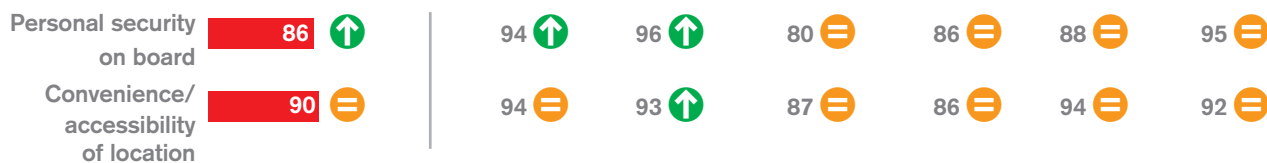
### Satisfaction with key measures:



### Satisfaction with other measures driving overall journey satisfaction\*:



### Satisfaction with other measures driving passengers to be very satisfied\*:



\*Drivers of satisfaction differ by network. The most common drivers across the survey are shown here



Statistically significant increase since 2014

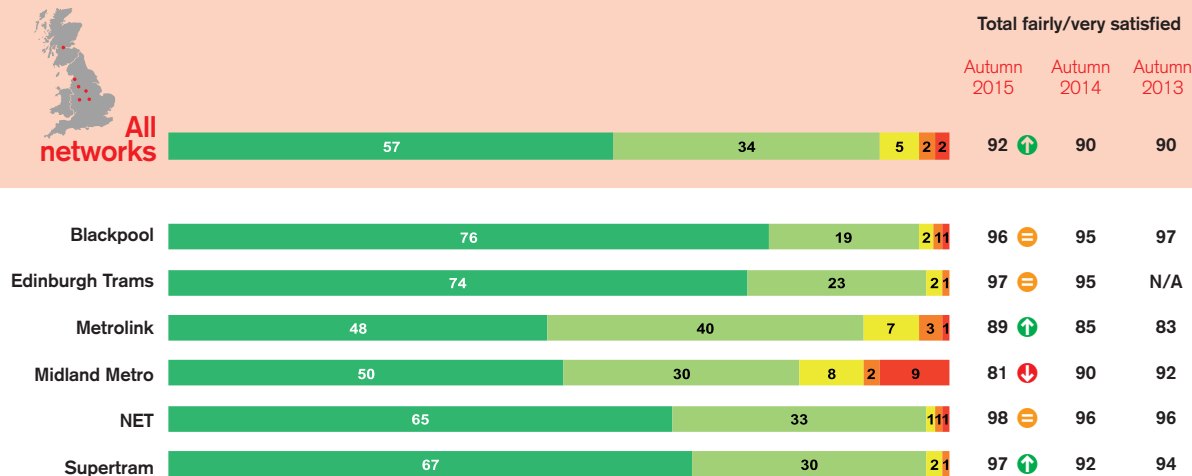


No change



Statistically significant decrease since 2014

## Overall satisfaction with the tram journey (%)



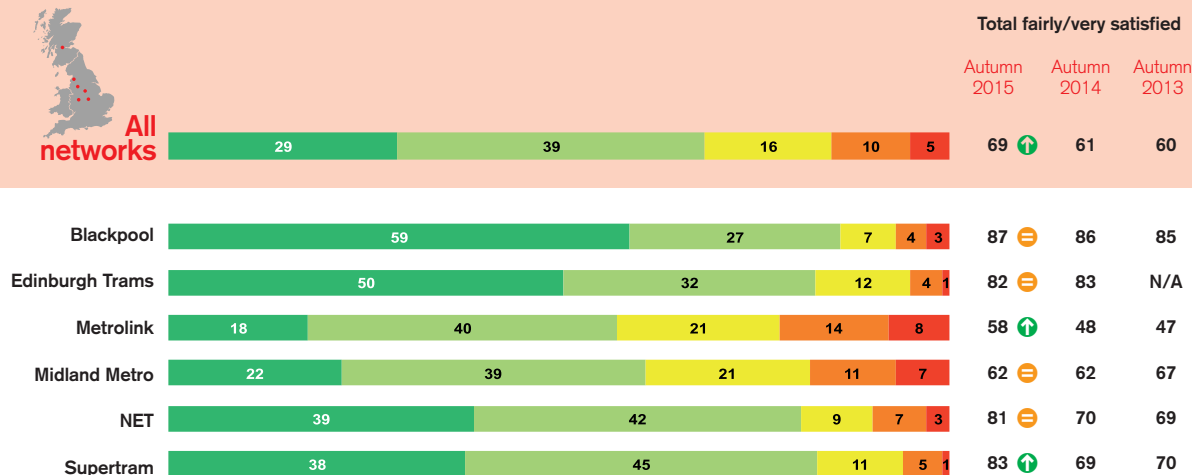
■ Very satisfied 
 ■ Fairly satisfied 
 ■ Neither/nor 
 ■ Fairly dissatisfied 
 ■ Very dissatisfied

**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 - 5600 (all networks), 588 (Blackpool), 713 (Edinburgh Trams), 2915 (Metrolink), 473 (Midland Metro), 318 (NET), 593 (Supertram)

↑ Statistically significant increase since 2014 
 = No change 
 ↓ Statistically significant decrease since 2014

## Value for money – fare-payers only (%)



■ Very satisfied 
 ■ Fairly satisfied 
 ■ Neither/nor 
 ■ Fairly dissatisfied 
 ■ Very dissatisfied

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

Base: all fare paying passengers - 4099 (all networks), 473 (Blackpool), 645 (Edinburgh Trams), 1992 (Metrolink), 363 (Midland Metro), 242 (NET), 384 (Supertram)

↑ Statistically significant increase since 2014 
 = No change 
 ↓ Statistically significant decrease since 2014

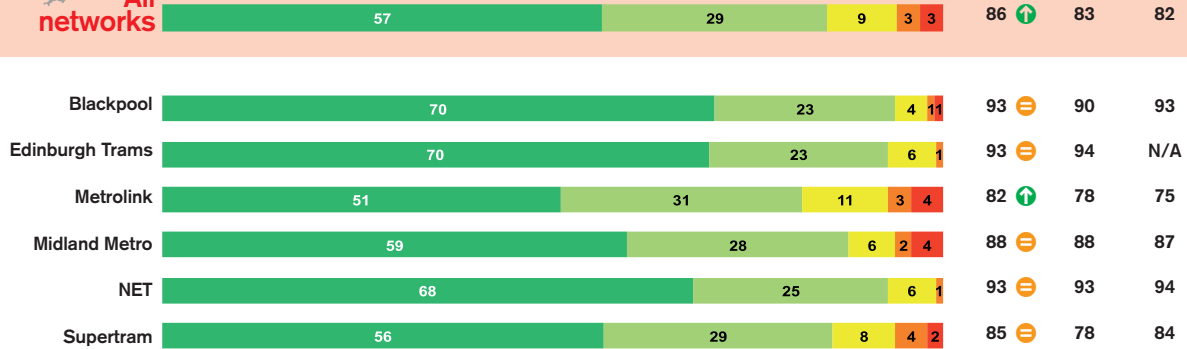
## Satisfaction – with the punctuality of the tram (%)



All networks

Total fairly/very satisfied

Autumn 2015 Autumn 2014 Autumn 2013



Very satisfied Fairly satisfied Neither/nor Fairly dissatisfied Very dissatisfied

### Q How satisfied were you with the punctuality of the tram?

Base: all passengers - 5299 (all networks), 543 (Blackpool), 682 (Edinburgh Trams), 2755 (Metrolink), 448 (Midland Metro), 306 (NET), 565 (Supertram)

↑ Statistically significant increase since 2014 = No change ↓ Statistically significant decrease since 2014

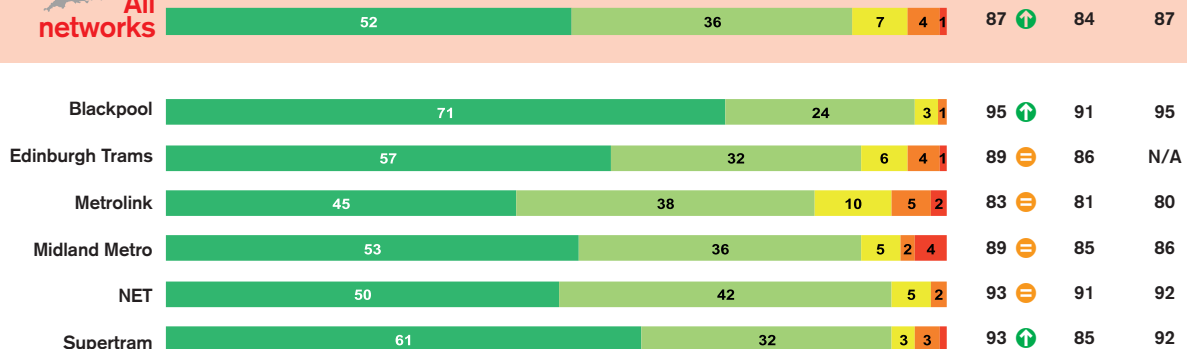
## Satisfaction – with on-tram journey time (%)



All networks

Total fairly/very satisfied

Autumn 2015 Autumn 2014 Autumn 2013



Very satisfied Fairly satisfied Neither/nor Fairly dissatisfied Very dissatisfied

### Q How satisfied were you with the amount of time the journey took?

Base: all passengers - 5538 (all networks), 573 (Blackpool), 710 (Edinburgh Trams), 2882 (Metrolink), 467 (Midland Metro), 314 (NET), 592 (Supertram)

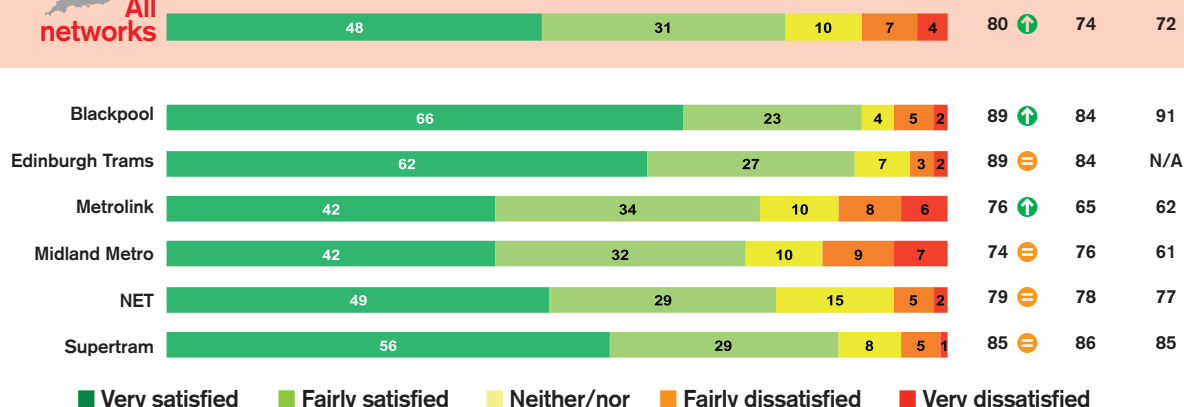
↑ Statistically significant increase since 2014 = No change ↓ Statistically significant decrease since 2014

## Satisfaction – with availability of seating or space to stand (%)



Total fairly/very satisfied

Autumn 2015 Autumn 2014 Autumn 2013



**Q** Thinking about whilst you were on the tram, please indicate how satisfied you were with sufficient room for all passengers to sit/stand?

Base: all passengers - 5555 (all networks), 580 (Blackpool), 718 (Edinburgh Trams), 2884 (Metrolink), 466 (Midland Metro), 318 (NET), 589 (Supertram)

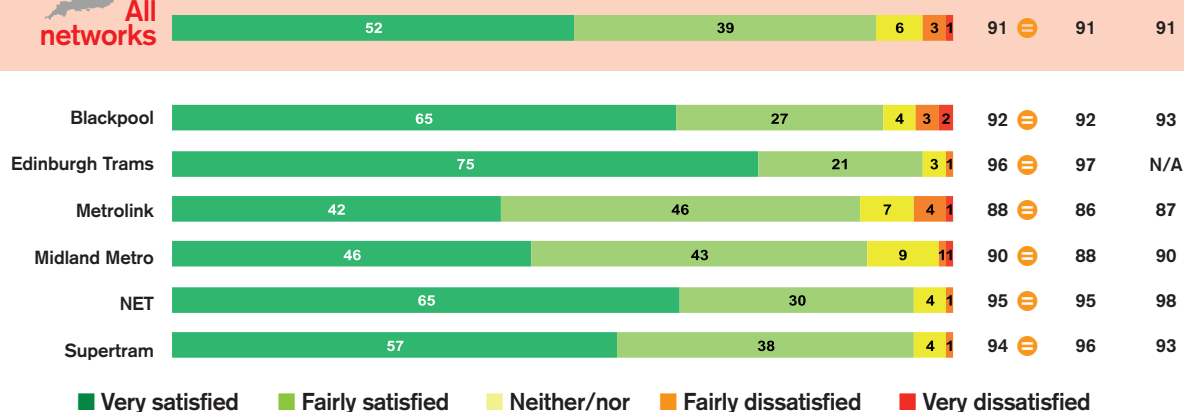
↑ Statistically significant increase since 2014    = No change    ↓ Statistically significant decrease since 2014

## Satisfaction – with the tram stop (%)



Total fairly/very satisfied

Autumn 2015 Autumn 2014 Autumn 2013



**Q** Overall, how satisfied were you with the tram stop?

Base: all passengers - 5592 (all networks), 580 (Blackpool), 719 (Edinburgh Trams), 2912 (Metrolink), 478 (Midland Metro), 318 (NET), 585 (Supertram)

↑ Statistically significant increase since 2014    = No change    ↓ Statistically significant decrease since 2014



# Our aim

We wanted to measure tram passenger journey satisfaction for six tram networks in Britain:

- Blackpool
- Edinburgh Trams
- Manchester Metrolink
- Midland Metro (Birmingham/Wolverhampton)
- Nottingham Express Transit (NET)
- Sheffield Supertram.

A detailed overview report together with individual reports for each tram network are available on our website via <http://bit.ly/tram-passenger-survey>

This report shows statistically significant differences compared to the Autumn 2014 Tram Passenger Survey. Some of these significant differences can be explained by changes to the tram networks since the 2014 fieldwork. These include:

- the inclusion of the Manchester Metrolink Airport line (which opened in November 2014, but was not included in the 2014 survey)
- the opening of the NET line extensions (creating two lines instead of one)
- introduction of new trams on the Manchester Metrolink and Midland Metro networks, providing greater capacity (including more double trams in Manchester)
- significant recent or ongoing engineering works in Manchester, Birmingham/Wolverhampton and Sheffield.

Blackpool Transport, Transport for Greater Manchester (Manchester Metrolink) and Centro (Midland Metro) contributed funding to the research to allow for a larger, more robust sample to be undertaken on their networks. Edinburgh Trams covered the full cost of the research on its network (this being outside the statutory remit of Transport Focus).

# How we did it

## Fieldwork

**Fieldwork:** 17 September to 25 November 2015. In 2014 fieldwork took place between 10 September and 27 November

**Interviewer shifts:** covered all days of the week and ran from 6am to 10pm. Each interviewer worked a three-hour shift







**Method:** choice of either paper questionnaire or online self-completion questionnaire.

## Sample size:

- **Blackpool:** 594 interviews (410 paper and 184 online)
- **Edinburgh Trams:** 734 interviews (607 paper and 127 online)
- **Manchester Metrolink:** 2954 interviews (2237 paper and 717 online)
- **Midland Metro:** 494 interviews (423 paper and 71 online)
- **Nottingham Express Transit (NET):** 328 interviews (285 paper and 43 online)
- **Sheffield Supertram:** 603 interviews (463 paper and 140 online).

**Research agency:** BDRC Continental

## The networks in context: autumn 2015

	The network	Passenger journeys*	Ticket purchasing	Information at stops	Frequency	Engineering disruption/other notes
	1 line 37 stops 11 miles	4.1 million	✗ Ticket machines at stops ✓ Conductors on board	✓ Info boards at stops (timetables, fares) ✗ Passenger information displays	Mon-Sat: every 15-30 mins Sun: 20-30 mins	<ul style="list-style-type: none"> <li>Blackpool illuminations 4 September – 8 November 2015</li> <li>Heritage trams operate bank holidays, weekends and summer but were not covered in this research</li> <li>No significant issues affected fieldwork.</li> </ul>
	1 line 15 stops 8.7 miles	4.9 million	✓ Ticket machines at stops ✗ Conductors on board	✗ Info boards at stops (timetables, fares) ✓ Passenger information displays	Mon-Sat: every 8-10 mins Sun: 12-15 mins	<ul style="list-style-type: none"> <li>Network opened 31 May 2014</li> <li>No significant issues affected fieldwork.</li> </ul>
	7 lines 91 stops 57 miles	31.2 million	✓ Ticket machines at stops ✗ Conductors on board	✓ Info boards at stops (timetables, fares) ✓ Passenger information displays (not all stops Bury and Altrincham lines)	Mon-Sat: every 6-12 mins Sun: 12-15 mins	<ul style="list-style-type: none"> <li>Second city works to provide direct link between St Peter's Square and Victoria</li> <li>Fire around Victoria 12 October; some fieldwork rearranged for short period</li> <li>Airport line opened late 2014, covered for first time in 2015</li> <li>No fieldwork on 10 October; 3 sporting events in one day including Rugby World Cup Fanzone</li> <li>Increasing use of double carriage trams.</li> </ul>
	1 line 23 stops 12.5 miles	4.4 million	✗ Ticket machines at stops ✓ Conductors on board	✓ Info boards at stops (timetables, fares) ✓ Passenger information displays	Mon-Sat: every 6-15 mins Sun: 15 mins	<ul style="list-style-type: none"> <li>Network improvement works took place from 26 October onwards; no fieldwork took place for a two week period from 26 October</li> <li>Following this, shifts were conducted between Wolverhampton and St Paul's.</li> </ul>
	2 lines 50 stops 20 miles	8.1 million	✓ Ticket machines at stops ✗ Conductors on board	✓ Info boards at stops (timetables, fares) ✓ Passenger information displays	Mon-Sat: every 3-15 mins Sun: 5-15 mins	<ul style="list-style-type: none"> <li>The phase two extension of the network opened July/August 2015 and was included in the TPS in 2015</li> <li>No significant issues affecting fieldwork.</li> </ul>
	3 lines 48 stops 18 miles	11.5 million	✗ Ticket machines at stops ✓ Conductors on board	✓ Info boards at stops (timetables, fares) ✗ Passenger information displays	Mon-Sat: every 5-20 mins Sun: 10-20 mins	<ul style="list-style-type: none"> <li>Tram collision on 22 October 2015 affected one shift; questionnaires distributed between Meadowhall Int. and Shalesmoor rather than to the end of the line at Middlewood.</li> </ul>

\*Source: Department for Transport, Passenger journeys on light rail and trams by system in England, 2014/15

## Data analysis

### Base definitions

All charts are based on those who gave an answer to an individual question. Those who either left the question blank or said 'don't know' have been excluded from the base. For this reason the base sizes for those charts based on 'All passengers' vary slightly between the different charts in this report.

Autumn 2014 comparison: this report shows results from Autumn 2014 at the 'All networks' level only. Full 2014 comparisons for each network can be found in the individual network reports. Significant changes are shown at the 95 per cent confidence level. 🟢/🔴 symbols are used throughout this report to indicate positive or negative significant changes.

### Weighting

This was based on a combination of information published by the Department for Transport about the annual number of passenger journeys taking place on each network, information provided by each of the operators about how these journeys are split by line (where relevant) and by days of the week and times of day, and passenger profile reports made by interviewers during each

fieldwork shift in which they recorded the age and gender profile of passengers on a cross section of tram journeys.

We weighted the responses in the following ways:

- tram network: (by line for those networks which were surveyed at both route and overall network level)
- age: 16-25, 26-59, 60+ (and not stated)
- gender: male, female (and not stated)
- time/day travelled: weekday am peak, weekday pm peak, weekday off peak and weekend.

Further weighting was applied across each of these by volume of passengers using each network.

Full details of the weighting scheme can be found in the TPS Autumn 2015 technical report.

### Waiver

Transport Focus has taken care to ensure that the information contained in TPS is correct. However, no warranty, express or implied, is given as to its accuracy and Transport Focus does not accept any liability for error or omission.

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