

Tram Passenger Survey Autumn 2016

Live webinar – 14 June 2017

Tram Passenger Survey results will also be featured at



18-19 July, Manchester

Agenda

Welcome and introduction

- David Sidebottom, Passenger Director, Transport Focus

Tram Passenger Survey Results – Autumn 2016

- Robert Pain, Senior Insight Advisor, Transport Focus

Questions to the presenters

- Chaired by David Sidebottom

Close

Housekeeping - rules

All microphones for attendees will be turned off at the beginning of the webinar.



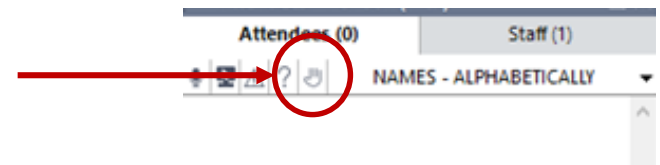
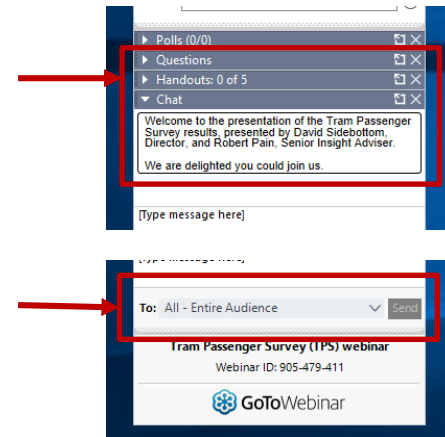
This video is intended to be uploaded to our website.

Housekeeping - asking questions

Questions can be submitted at any point during the presentation: Steven will be managing and collating these throughout.

Use the chat function to submit all questions and comments to Steven Harry.

Use the hand gesture symbol to help Steven become aware of any issues, questions or comments you wish to make.



Tram Passenger Survey (TPS) Results – Autumn 2016

Robert Pain, Senior Insight Advisor, Transport Focus

Robert Pain
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June 2017

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

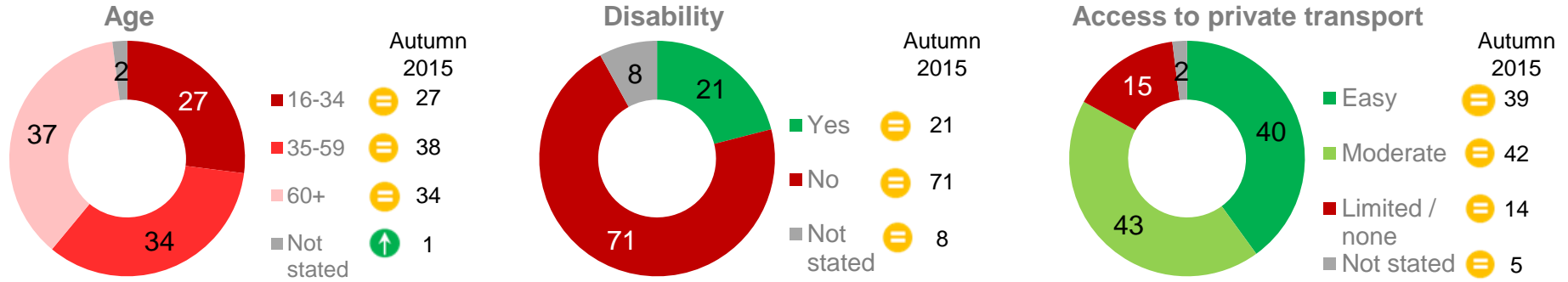
	The Network	Passenger Journeys	Ticket Purchasing	Information at stops	Frequency	Engineering disruptions/other notes
	1 line 38 stops 11 miles	4.9* million	✗ TVMs at stops ✓ Conductors on board	✓ Info boards at stops (TTs, fares) ✗ Passenger Info Displays	Mon-Sat: every 15-30 mins Sun: 20-30 mins	<ul 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	✓ TVMs at stops ✗ Conductors on board	✗ 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	✓ TVMs at stops ✗ Conductors on board	✓ 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	✓ TVMs at stops ✓ Conductors on board	✓ 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	✓ TVMs at stops ✗ Conductors on board	✓ 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	✗ TVMs at stops ✓ Conductors on board	✓ 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

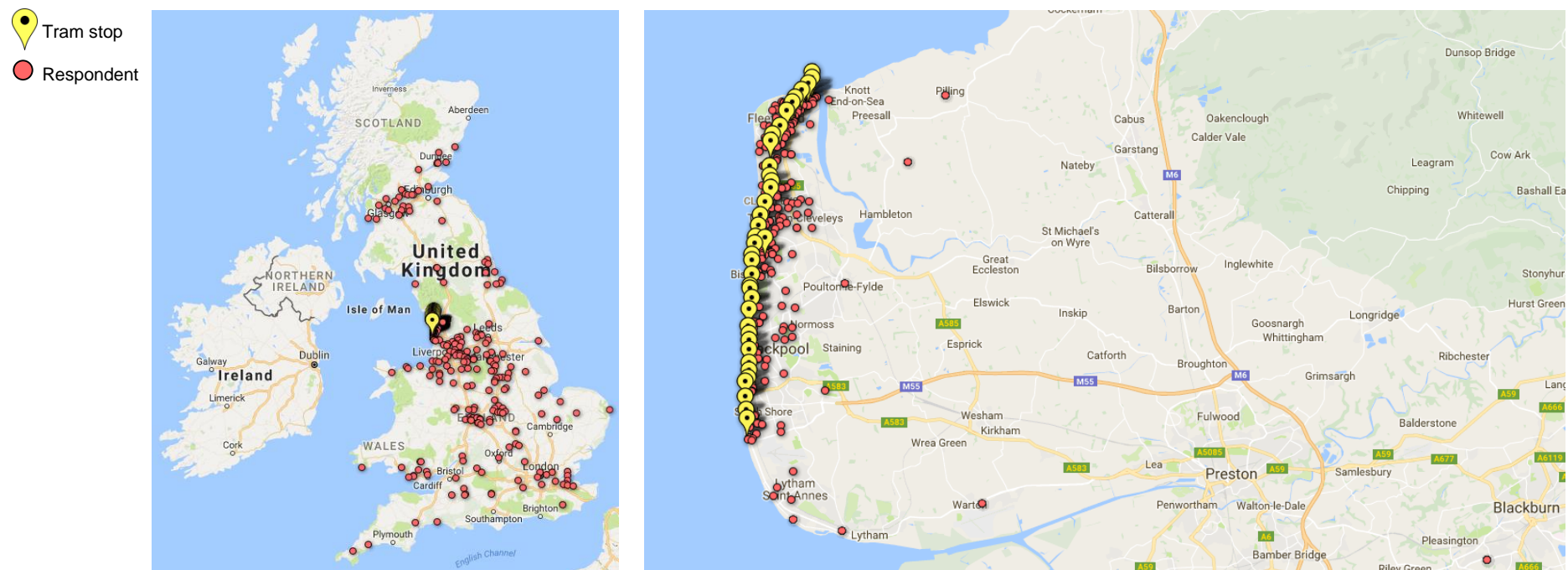
**Source: Direct from operator

Blackpool passengers: summary

Overview of passenger demographics



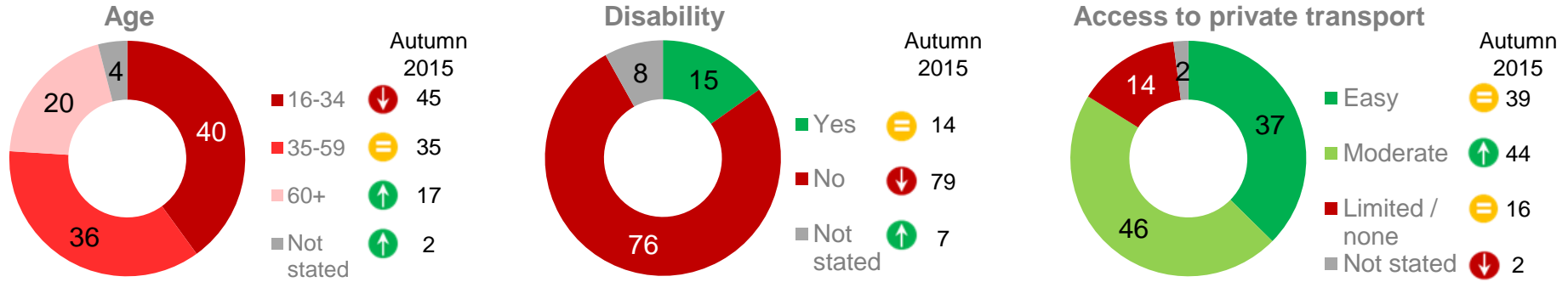
Passengers' postcodes relative to tram network



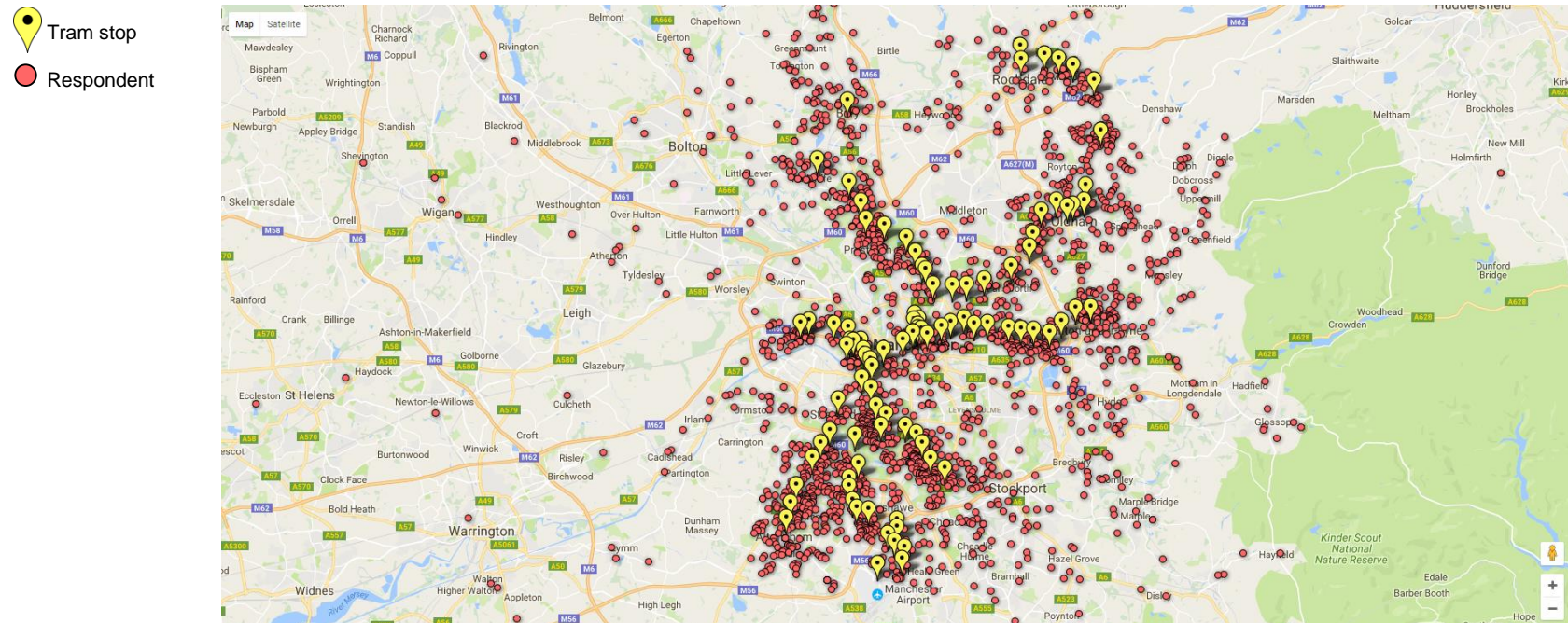
- 📈 Statistically significant increase since 2015
- ⚖️ No change
- 📉 Statistically significant decrease since 2015

Metrolink passengers: summary

Overview of passenger demographics



Passengers' postcodes relative to tram network

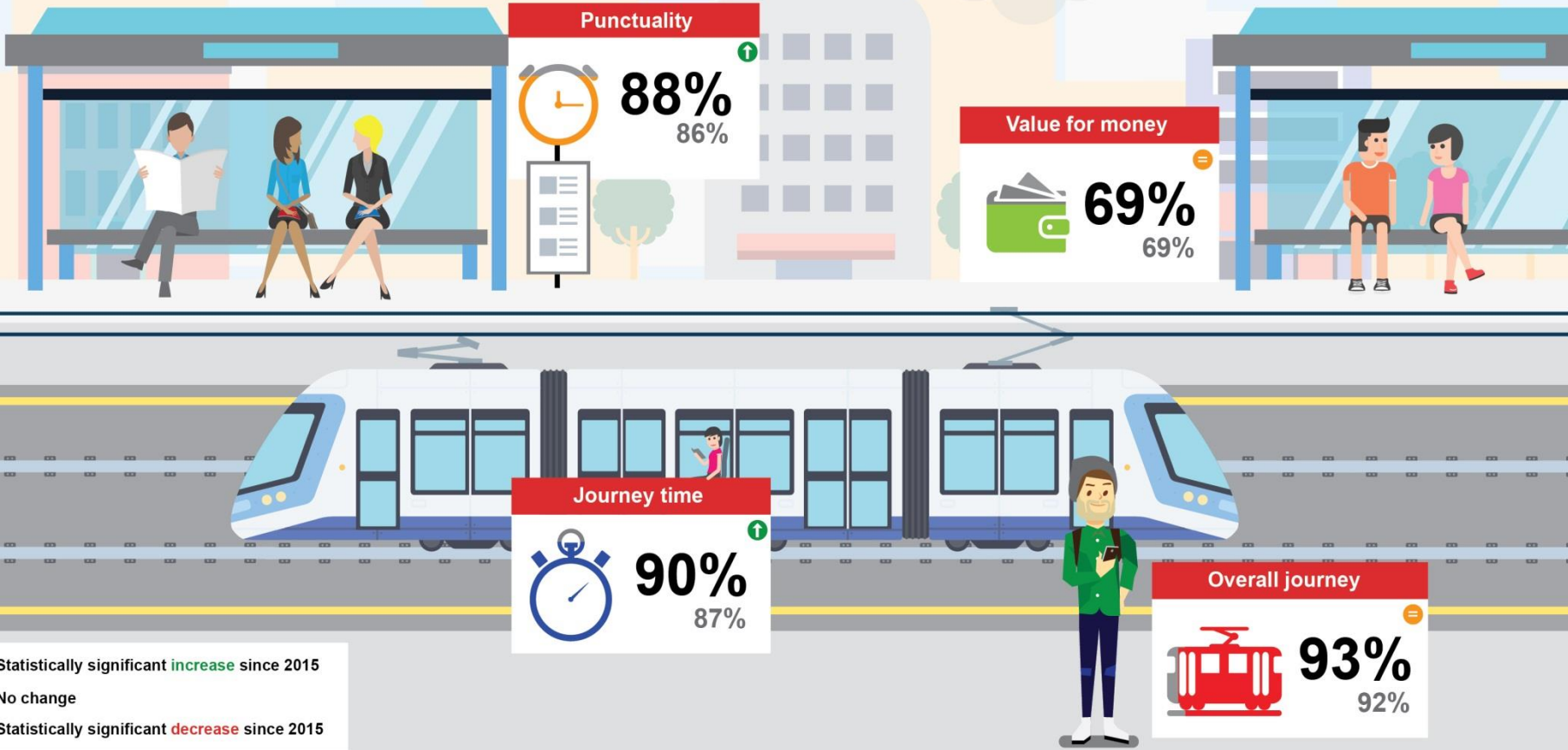


- ↑ Statistically significant increase since 2015
- = No change
- ↓ Statistically significant decrease since 2015

Tram Passenger Survey (TPS) – All networks

Key findings

Key performance measures for all networks 2016

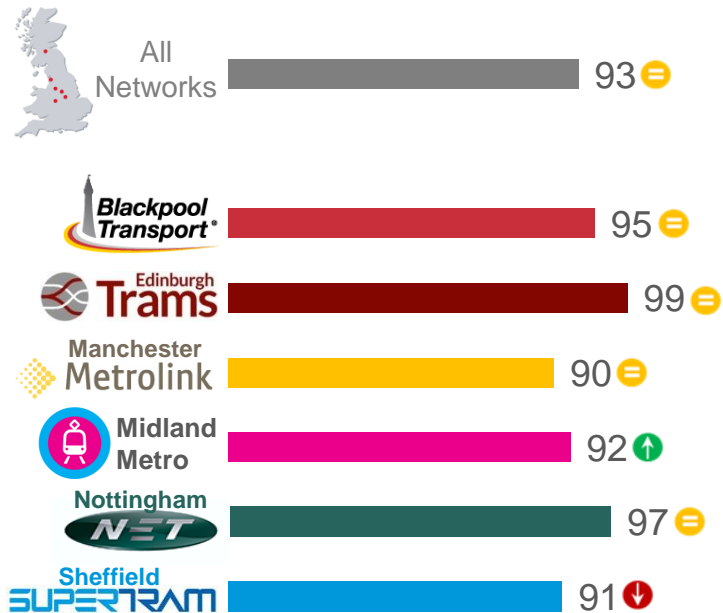


Figures shown are total very or fairly satisfied.
Last year's figure is shown in grey

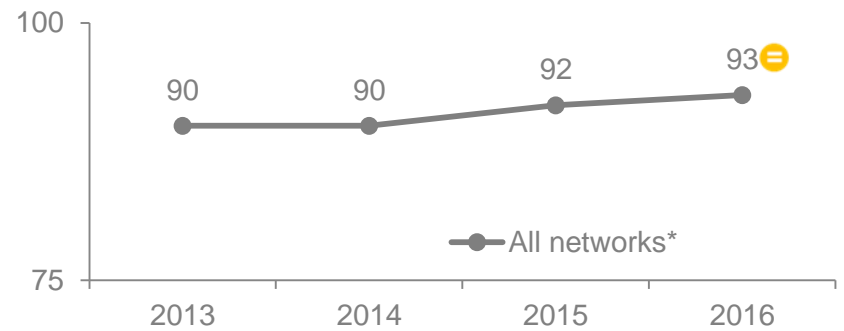
Passenger satisfaction with the journey overall



Overall journey satisfaction in 2016 (%)



Overall journey satisfaction trend (%)

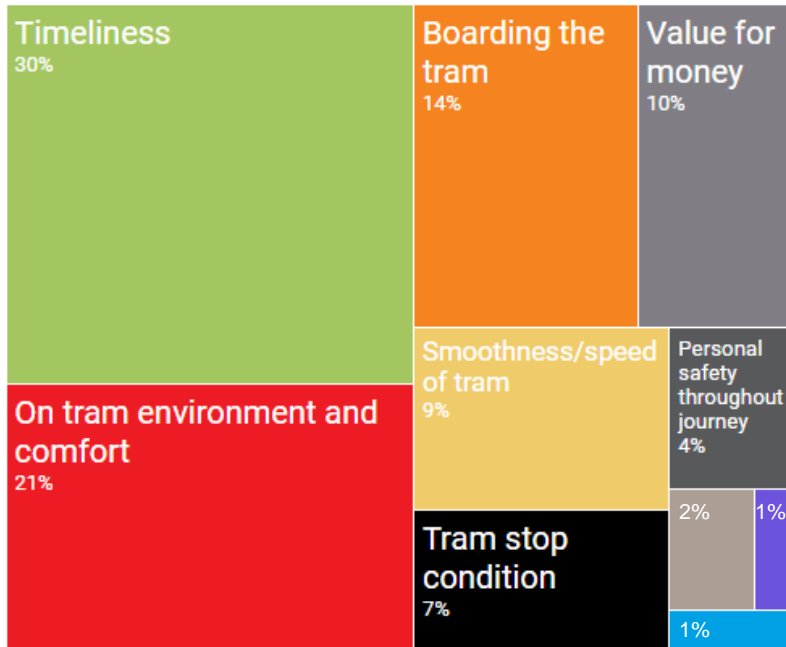


*The 2013 survey did not include Edinburgh Trams

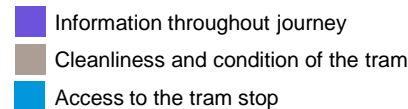
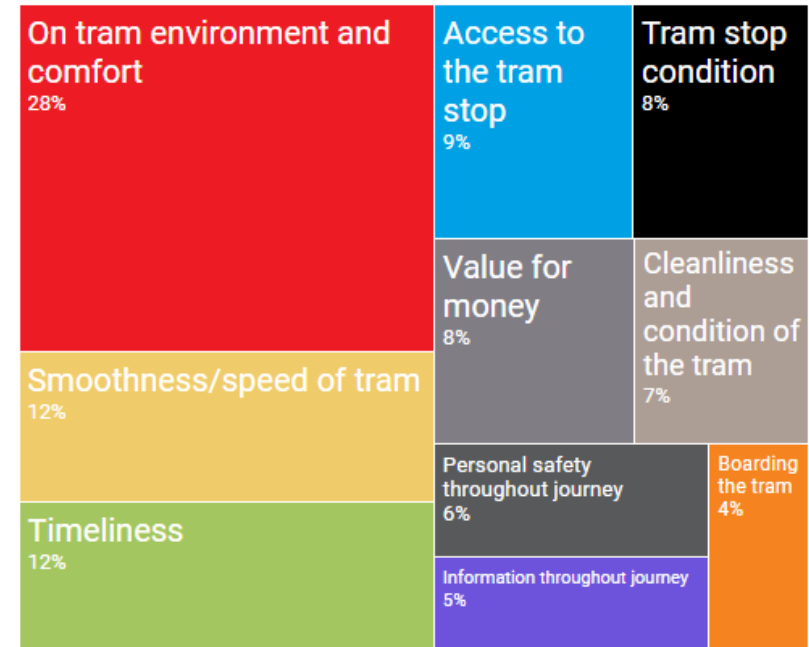
What makes a satisfactory or great journey?

The top factors linked to overall journey satisfaction*

What makes a satisfactory journey?



What makes a great journey?



*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.

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

Passenger experience in 2016: across the networks



All Networks



Midland Metro



Satisfaction with key measures:



Overall journey **93** =

95 =

99 =

90 =

92 ↑

97 =

91 ↓



Value for Money **69** =

86 =

83 =

62 ↑

68 =

78 =

71 ↓



Punctuality **88** ↑

94 =

94 =

86 ↑

87 =

96 =

82 =



Overall stop **90** =

91 =

97 =

89 =

88 =

94 =

89 ↓

Satisfaction with other measures which make a satisfactory journey:



Length of time waiting for the tram **88** ↑

94 ↑

94 =

85 ↑

86 =

95 =

84 =

Satisfaction with other measures which make a great journey:



Space to sit/stand on board **78** =

87 =

90 =

74 =

70 =

80 =

79 =



Comfort of the seats **77** =

88 =

94 =

73 =

53 =

81 =

86 =



Amount of personal space on board **73** ↓

83 =

89 =

71 =

61 =

72 =

74 ↓



Provision of grab rails **81** =

90 =

91 =

80 =

72 =

79 =

84 =



Temperature on board **83** =

90 =

89 =

81 =

78 =

83 =

84 =

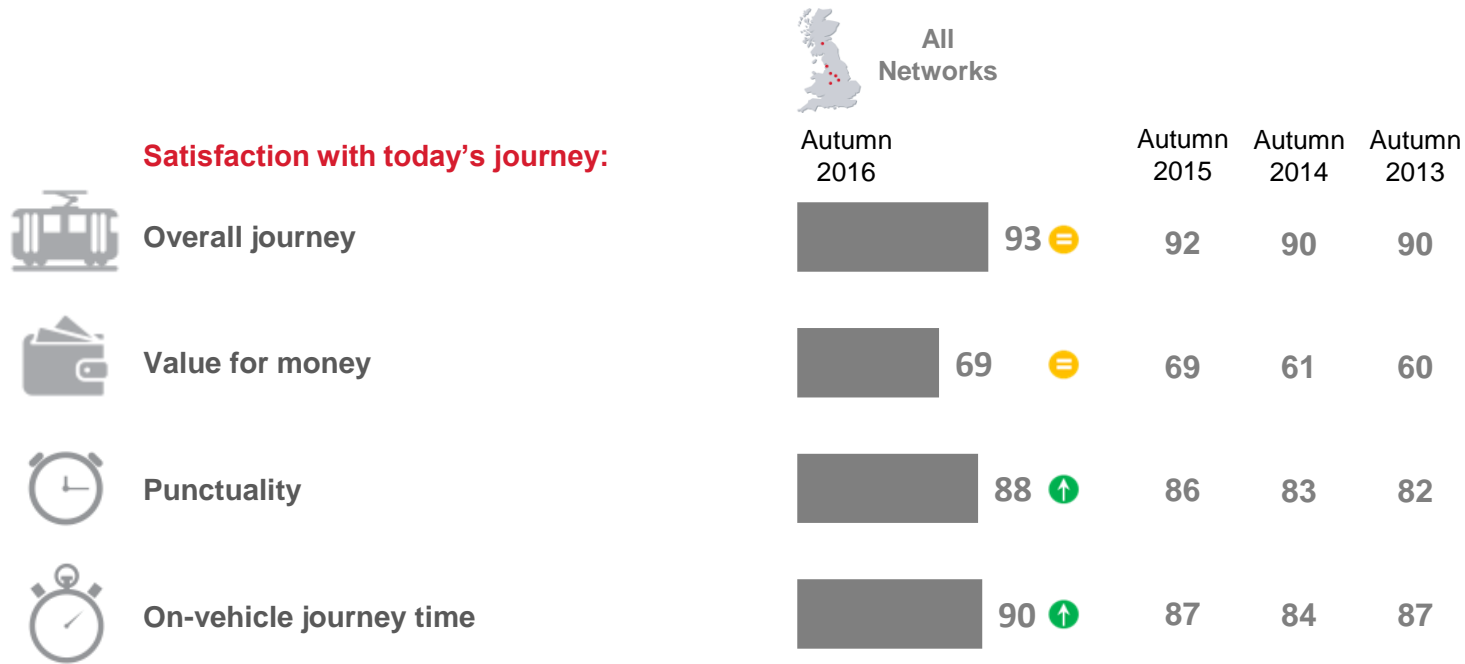
*Drivers of satisfaction differ by network. The most common drivers across TPS are shown here

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

Tram Passenger Survey (TPS) – All networks

Experience and opinions of the journey

Experience and opinions of the journey: summary



↑ Statistically significant increase since 2015

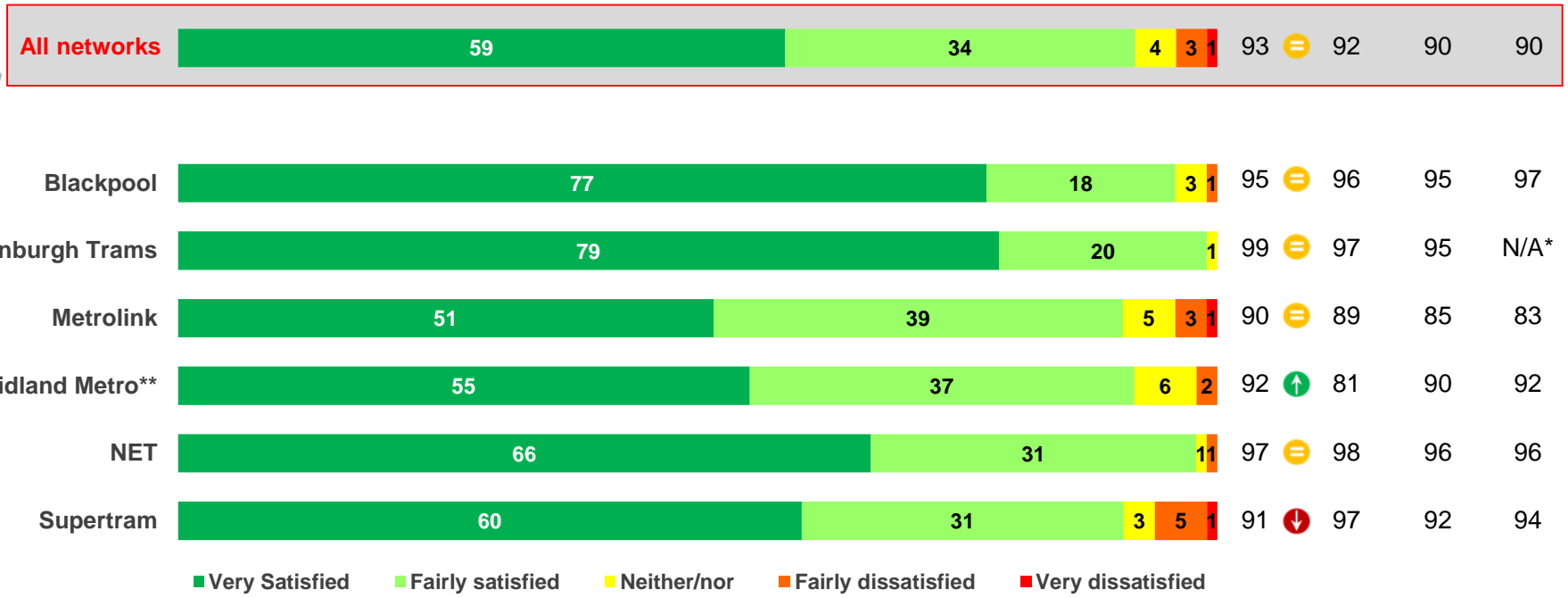
= No change

↓ Statistically significant decrease since 2015

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)

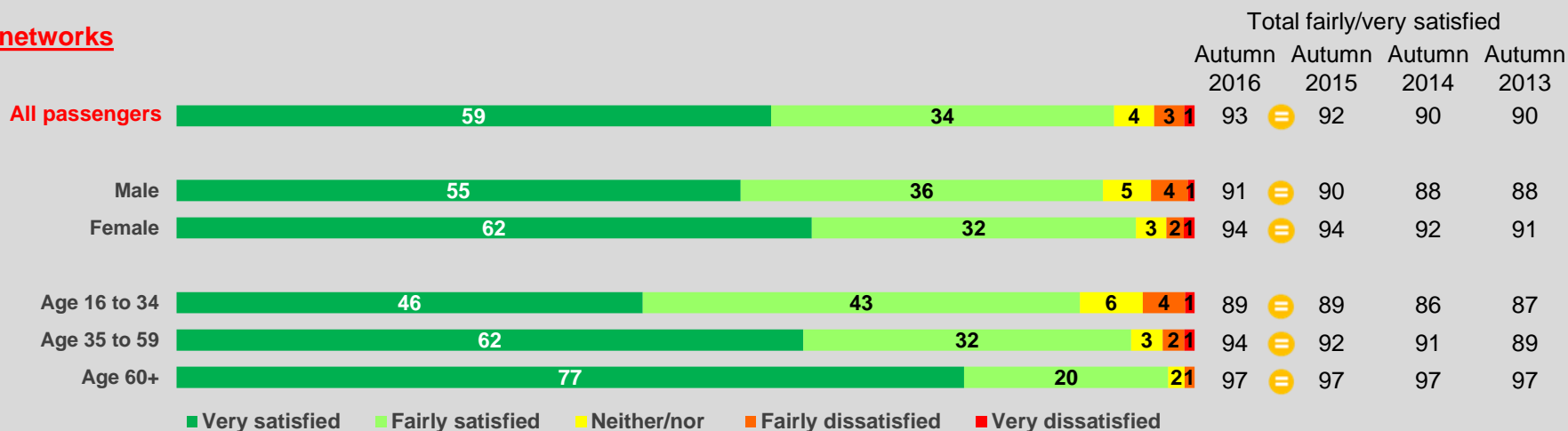
↑ Statistically significant increase since 2015

= No change

↓ Statistically significant decrease since 2015

Overall satisfaction (%) – by gender and age

All networks

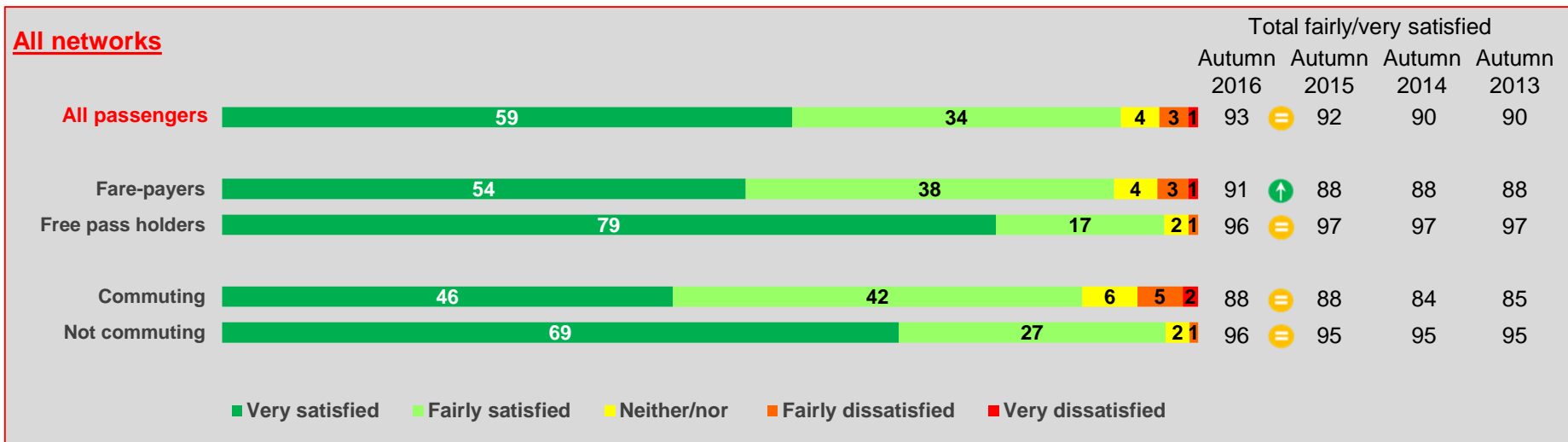


Q. Overall, taking everything into account from the start to the end of this tram journey, how satisfied were you with your tram journey today?

Base: All passengers – 5281

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

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?

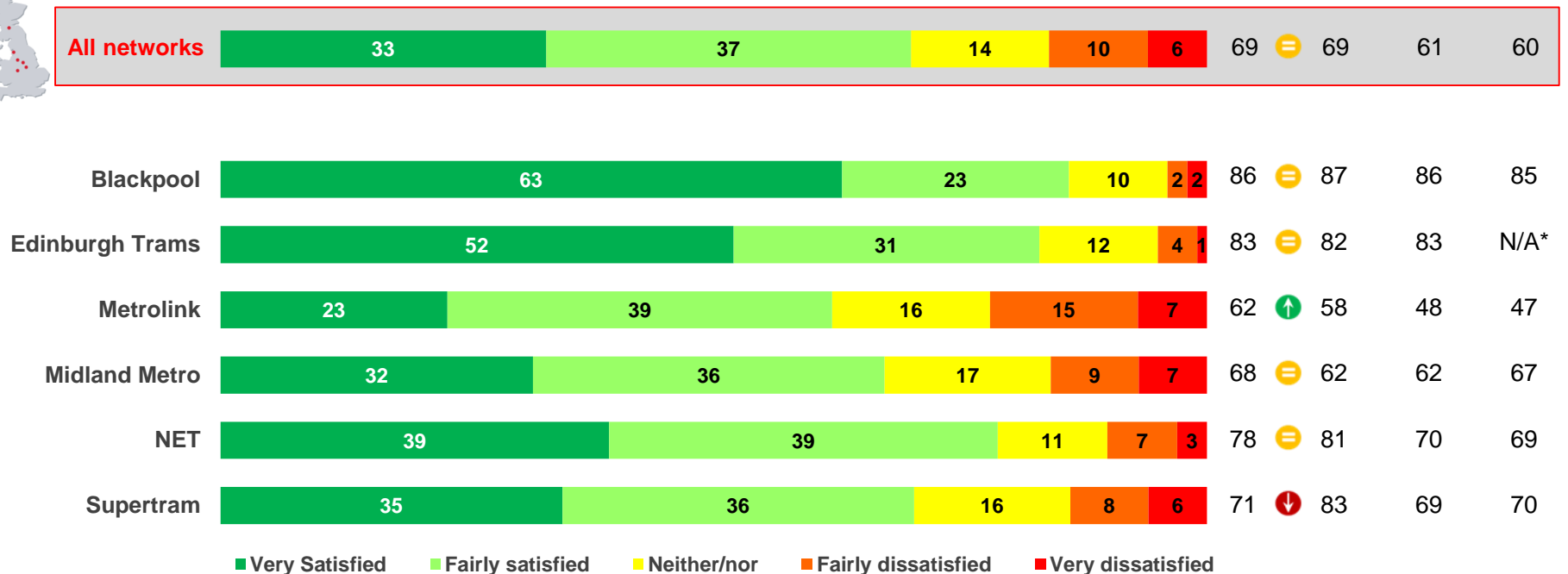
Base: All passengers – 5281

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

Value for money (%) – fare-payers only

Total fairly/very satisfied

Autumn 2016 Autumn 2015 Autumn 2014 Autumn 2013



*The 2013 survey did not include Edinburgh Trams

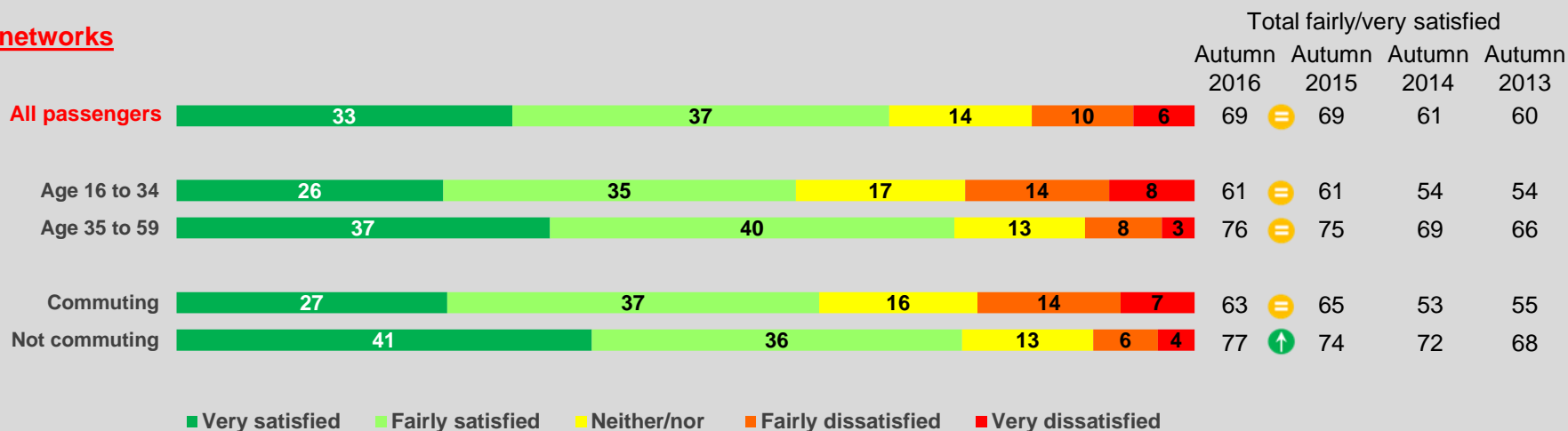
Q. How satisfied were you with the value for money of your journey?

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

All networks



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
- ↓ Statistically significant decrease since 2015

Tram Passenger Survey (TPS) – All networks

Waiting at the stop

Waiting at the stop: summary (1)



Satisfaction with the stop:



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

Waiting at the stop: summary (2)



All Networks



Midland Metro



Stagecoach

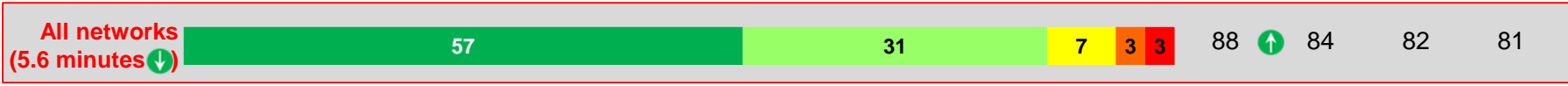


Satisfaction with the stop:

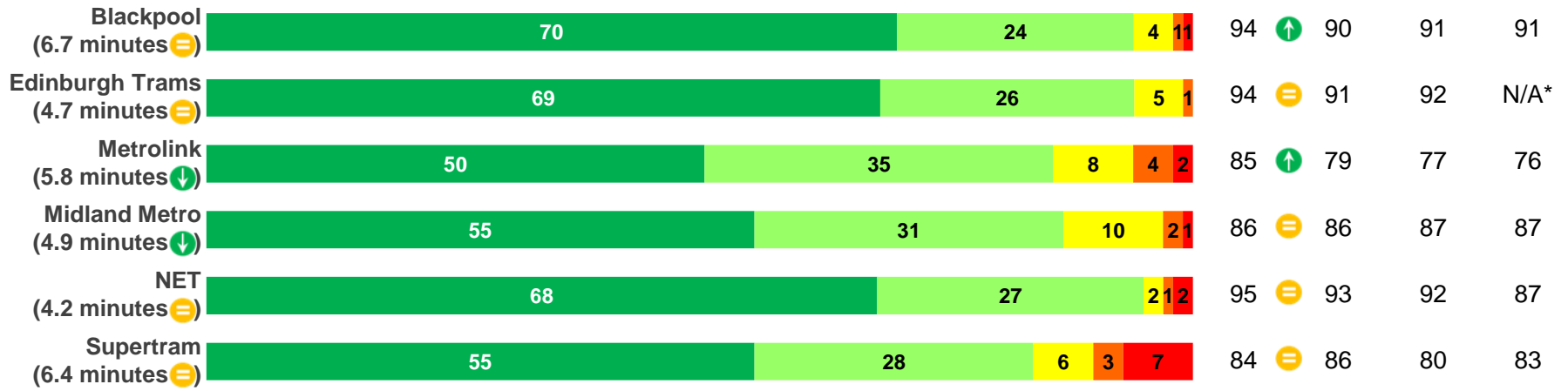
	All Networks	Blackpool Transport	Edinburgh Trams	Metrolink Manchester	Midland Metro	NET Nottingham	SUPERTRAM Sheffield
Overall satisfaction with the stop	90 =	91 =	97 =	89 =	88 =	94 =	89 ↓
Convenience / accessibility	89 =	93 =	92 =	88 =	89 =	93 =	86 ↓
Freedom from graffiti / vandalism	87 ↓	87 ↓	99 =	83 =	90 =	96 =	87 =
Behaviour of other passengers	87 =	91 =	97 =	84 =	83 =	90 =	89 =
Personal safety	86 =	91 =	96 =	85 =	80 =	88 =	87 =
Distance from journey start	85 ↑	91 =	89 =	83 =	85 =	89 =	82 =
General condition and maintenance	85 =	84 ↓	98 =	81 =	89 =	93 =	82 ↓
Freedom from litter	84 =	87 =	98 =	78 =	84 =	94 =	85 =
Information provided	81 =	82 ↓	90 ↑	78 =	79 =	86 =	77 =

Satisfaction with waiting time (%)

Total fairly/very satisfied
Autumn 2016 Autumn 2015 Autumn 2014 Autumn 2013



Average reported waiting time displayed in brackets



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

*The 2013 survey did not include Edinburgh Trams

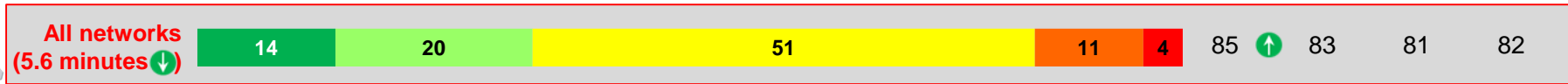
Q. How satisfied were you with the length of time you had to wait for the tram?

Base: All passengers – 5246 (All networks), 558 (Blackpool), 521 (Edinburgh Trams), 3003 (Metrolink), 606 (Midland Metro), 283 (NET), 275 (Supertram)

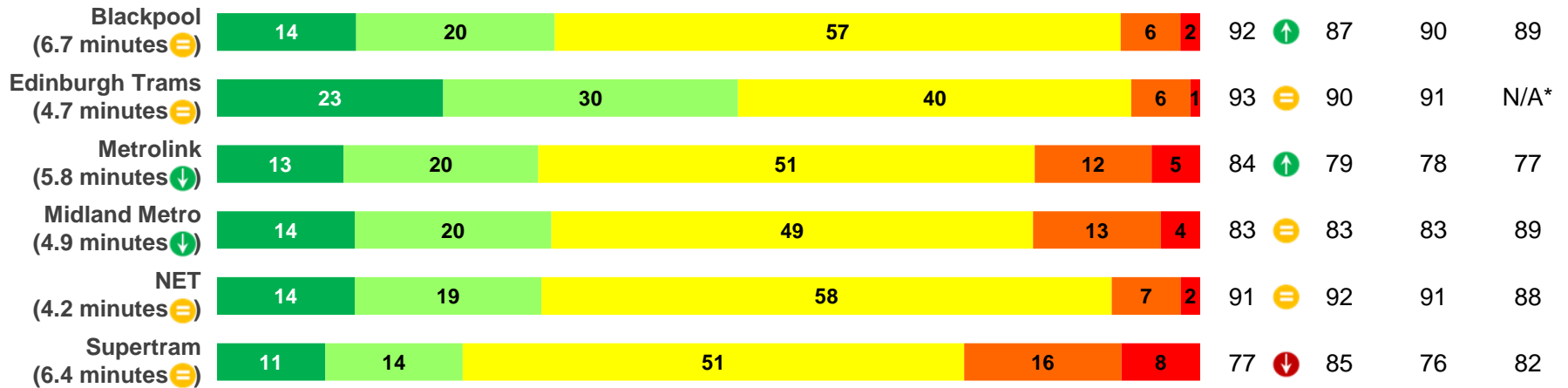
↑ Statistically significant increase since 2015
= No change
↓ Statistically significant decrease since 2015

How actual waiting time compared to expected (%)

Total about the same or a little/much less than expected
 Autumn 2016 Autumn 2015 Autumn 2014 Autumn 2013



Average reported waiting time displayed in brackets



*The 2013 survey did not include Edinburgh Trams

Q. Thinking about the time you waited for the tram today, was it [] than expected?

Base: All passengers – 5255 (All networks), 561 (Blackpool), 513 (Edinburgh Trams), 3021 (Metrolink), 603 (Midland Metro), 288 (NET), 269 (Supertram)

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

Tram Passenger Survey (TPS) – All networks

The tram

The tram: summary (1)



Start of journey

Route info on tram	91	=
Exterior cleanliness	91	=
Ease getting on	94	=
Time taken to board	95	=



On board

Interior cleanliness	89	=
Info on board	86	=
Seat/standing space	78	=
Seat comfort	77	=
Personal space	73	↓
Provision grabrails	81	=
Temperature	83	=
Personal security	85	=



The driver

Appearance	92	=
Greeting	83	=
Helpfulness/attitude	86	=
Safety of driving	92	↓
Smoothness journey	81	=

Tram Passenger Survey (TPS) – All networks

Negative experiences during the journey

Negative experiences during the journey: summary



All Networks



Edinburgh Trams



Metrolink Manchester



Midland Metro



Stagecoach

SUPERTRAM Sheffield

Passengers experiencing a delay to their journey



8



2



4



9



6



4



16



Typical length of delay
(perceived)

10 mins

18 mins

5 mins

11 mins

9 mins

18 mins

6 mins

Most common cause of delay

Signal failure/road congestion, but a third didn't know or were not told

Time taken to board
(n=9)

Congestion
(n=18)

Signal/points failure
(n=216)

Tram failure
(n=27)

Tram failure/congestion
(n=14)

Waiting too long at stops/congestion
(n=33)

Passengers with worry or concern about others' behaviour on board



7



6



1



10



8



3



5



(Caution small base)

Tram Passenger Survey (TPS) – All networks

Passengers' suggested improvements

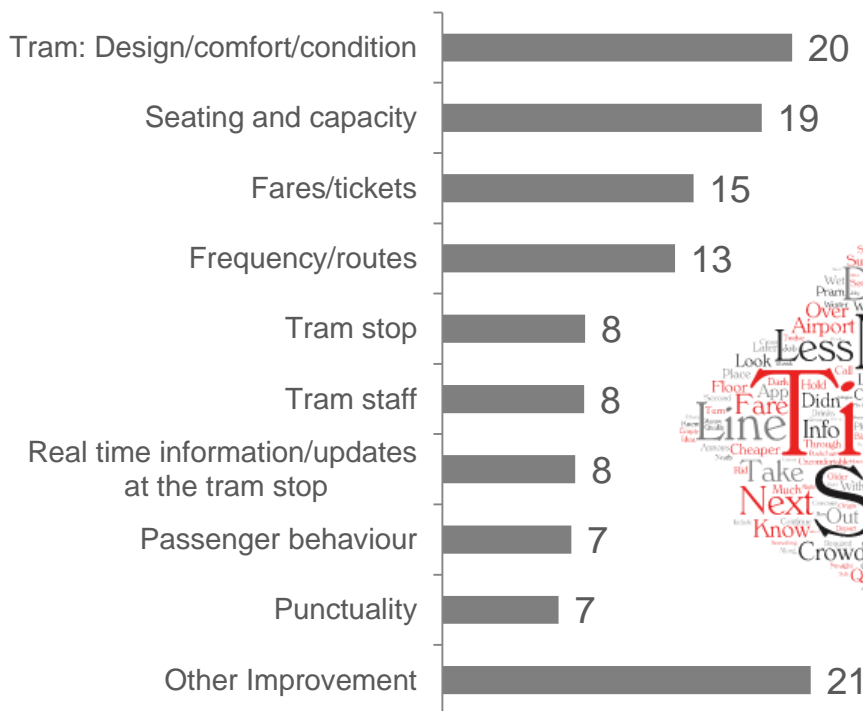
Passengers' suggested improvements: summary



67%[↑]

of all passengers in 2016 had no suggestions for improvements

...of the 33% that did, the most common service areas for improvement were:



Note: word cloud based on responses to the online survey only

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



Tram Passenger Survey (TPS) – All networks

Opinion of trams in the local area

Opinion of trams in the local area: summary



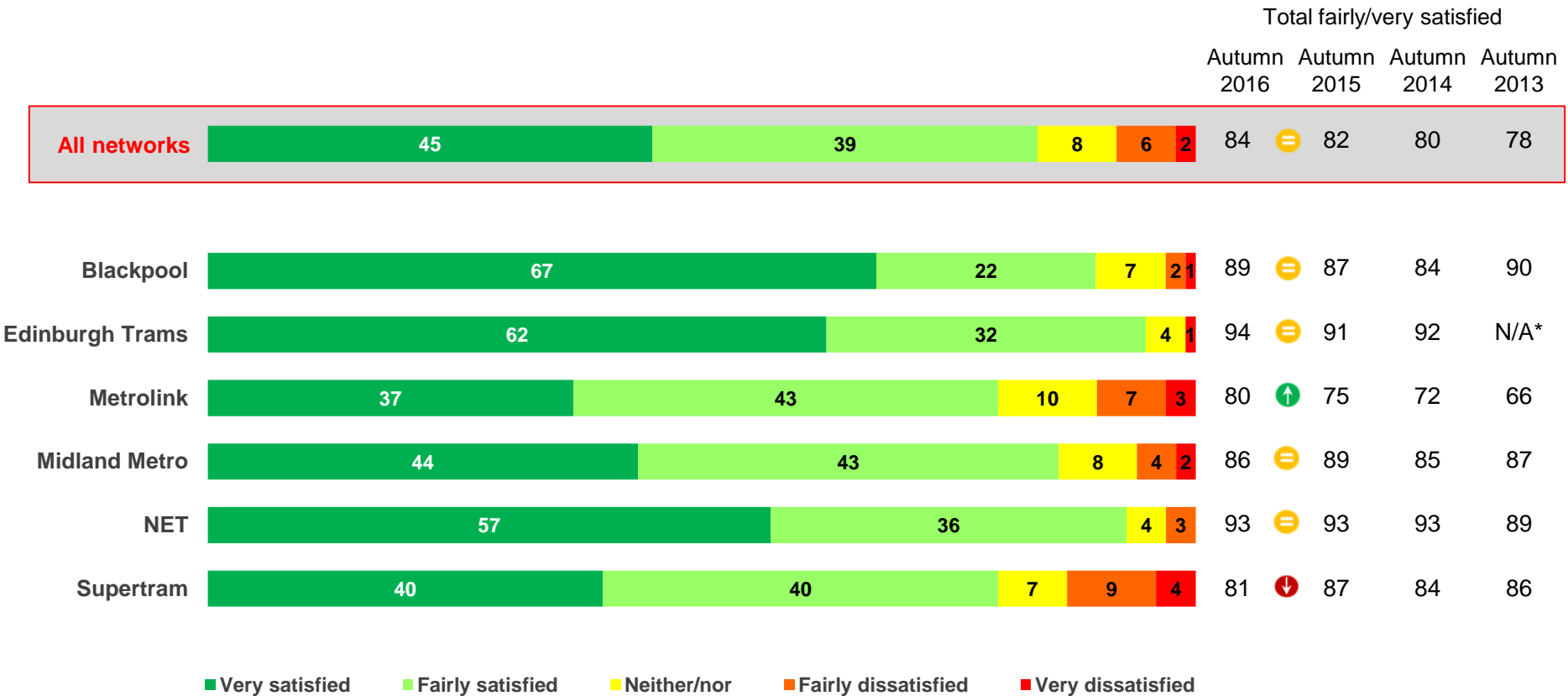
General opinion of services in area:

	Autumn 2016		Autumn 2015	Autumn 2014	Autumn 2013
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

Satisfaction with the frequency of service (how often trams run) (%)



*The 2013 survey did not include Edinburgh Trams

Q. How satisfied are you overall with the frequency (how often trams run)?

Base: All passengers - 5018 (All networks), 540 (Blackpool), 474 (Edinburgh Trams), 2897 (Metrolink), 572 (Midland Metro), 271 (NET), 264 (Supertram)

↑ 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

Tram Passenger Survey (TPS) Results – Autumn 2016

Robert Pain, Senior Insight Advisor, Transport Focus

Robert Pain
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Insight Team, Transport Focus, Fleetbank House, 2-6 Salisbury Square, London, EC4Y 8JX

June 2017

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

Questions to the presenters

Chaired by David Sidebottom

Thank you for watching!

We will be in touch to gather your feedback on the session

Reports from the Tram Passenger Survey are now available on our website

Tram Passenger Survey Autumn 2016

Live webinar – 14 June 2017

Tram Passenger Survey results will also be featured at



18-19 July, Manchester