Tram Passenger Survey

Key findings
Autumn 2018

Foreword

Insight from the Tram Passenger Survey continues to be used to make a real and positive difference to the service that passengers experience.

Now in its sixth year, the Tram Passenger Survey has covered passengers' views of their journey in four network areas in England, outside of London. This covered operations in Blackpool, Sheffield, Manchester and Birmingham.

In autumn 2018 Transport Focus spoke to almost 5000 passengers about the tram journey they had just made. It is good to report that overall passenger satisfaction stood at 91 per cent across the surveyed areas and with high levels of very satisfied passengers in Blackpool and Sheffield.

The all-important rating of value for money remains at 68 per cent satisfaction across the four areas. It is pleasing to note however that passengers using all of the networks individually reported a slight increase in satisfaction with value for money from the last trip they took.

Also, across the four networks, tram passengers reported a significant increase in satisfaction with the smoothness of their journey. Manchester Metrolink passengers reported a significant increase in this area of passenger comfort.

The Tram Passenger Survey provides a constant, robust measurement of passenger satisfaction with tram services. It also informs our understanding of barriers to greater use of tram, how to encourage greater use and how to improve passenger experience.

The team at Transport Focus has presented the findings from the latest survey to the tram operators, transport authorities and other key stakeholders. Transport Focus works collaboratively with these decision makers to identify areas of passenger concern and general improvements and develop action plans to resolve them.

Transport Focus is grateful for the co-operation of the four networks covered by this survey and for contributing to the funding. This has enabled Transport Focus to provide a rich source of passenger views to identify and secure better services in the future.

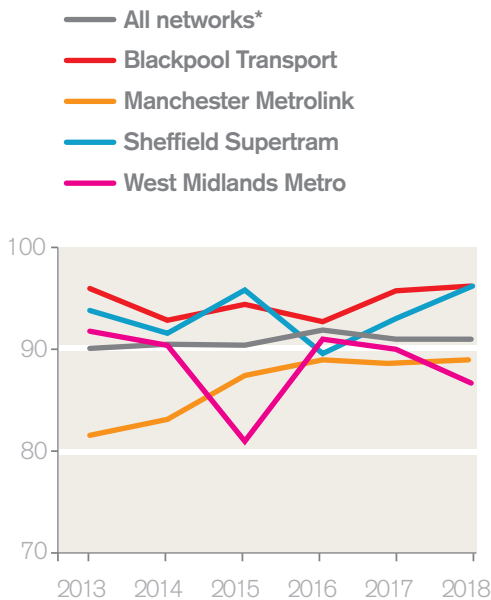**Jeff Halliwell**
Chair, Transport Focus

Headlines

Overall satisfaction with the journey

- Across all four tram networks overall journey satisfaction has remained consistent since 2017, at 91 per cent. The number of passengers saying they were 'very satisfied' with their journey increased slightly from 56 per cent in 2017 to 58 per cent
- Satisfaction is high across all networks. There have been no significant increases or decreases to overall journey satisfaction on any of the networks
- Other key performance measures for all networks such as punctuality and journey time remain high, at 89 per cent and 88 per cent respectively

- Satisfaction with some onboard measures has significantly increased since 2017, such as information provided on board and factors relating to the staff.

Passenger experience: a snapshot

Overall journey satisfaction: trend over time

- All networks*
- Blackpool Transport
- Manchester Metrolink
- Sheffield Supertram
- West Midlands Metro

Overall journey satisfaction: 2018

All networks* — 91 =

Blackpool Transport* — 97 =

Manchester Metrolink — 89 =

Sheffield Stagecoach SUPERTRAM — 97 =

West Midlands Metro — 87 =

⬆ Statistically significant increase since 2017
= No change
⬇ Statistically significant decrease since 2017

*All networks includes different networks each year. 2018 excludes Nottingham Express Transit. 2013, 2017 and 2018 exclude Edinburgh Trams.
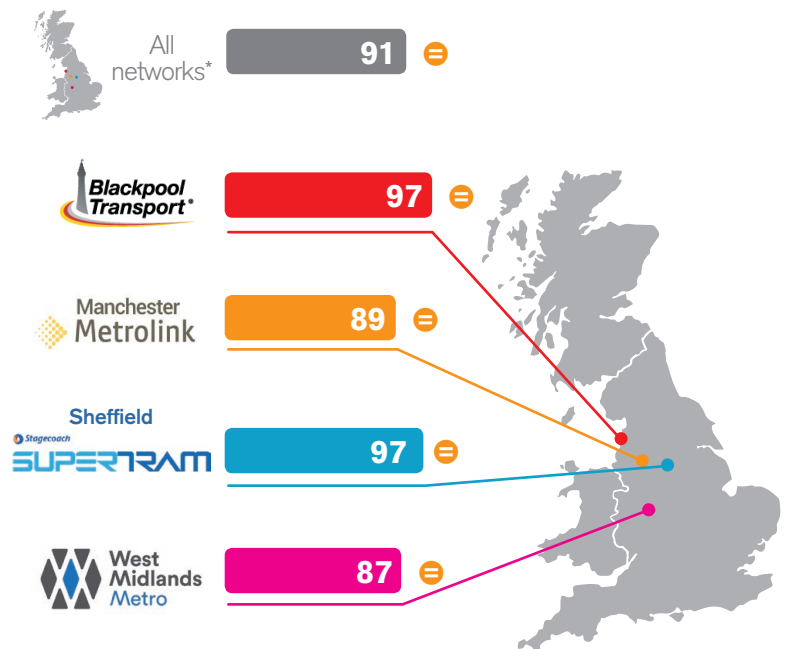
What makes a satisfactory or great journey?

The top factors linked to overall journey satisfaction*

What makes a satisfactory journey?

Value for money 21%	Smoothness/speed of tram 12%	Cleanliness and condition of the tram 7%
On tram environment and comfort 17%	Timeliness 7%	Personal safety throughout the journey 7%
Boarding the train 13%	Information throughout journey 5%	
	Access to the tram stop 6%	Tram stop condition 4%

What makes a great journey?

On tram environment and comfort 23%	Value for money 11%	
	Cleanliness and condition of the tram 10%	
Smoothness/speed of tram 14%	Tram stop condition 10%	
Personal safety throughout the journey 13%	Access to the tram stop 7%	Timeliness 9%
		Boarding the tram 2%

*See page 13 for an explanation of how these themes were calculated

- A key factor which makes tram journeys both satisfactory and great is the onboard environment and comfort of the tram. Attributes relating to this have remained relatively consistent compared to 2017, however satisfaction with the smoothness of the journey increased significantly to 82 per cent. The amount of personal space on board is the lowest rated on-board aspect, with 71 per cent of passengers satisfied
- The next most important factor is value for money. This is more important to making journeys 'satisfactory' than 'great'.

The top factors linked to overall journey satisfaction and how they performed in 2018

What makes a satisfactory or great journey?

On tram environment and comfort

73% ⊖ Availability of seating or space to stand

74% ⊖ Comfort of the seats

71% ⊖ Amount of personal space

82% ⊖ Temperature

82% ⬆ Smoothness of journey on the tram

Timeliness

89% ⊖ Punctuality

89% ⊖ Length of time waiting for the tram

⬆ Statistically significant increase since 2017
⊖ No change
⬇ Statistically significant decrease since 2017

Other findings

- Amongst fare-paying passengers 68 per cent were satisfied with the value for money of their journey, the same as 2017 (68 per cent)
- When evaluating whether their journey represented value for money; passengers' main criteria were the cost of the tram versus other modes of transport (which has increased significantly since 2017 amongst those satisfied with value for money) and the cost for the distance travelled
- When thinking more generally about trams in the local area (rather than a specific journey) passengers are largely satisfied with a range of factors including ease of getting to local amenities (90 per cent), connections with other modes of transport (89 per cent), ease of buying tickets (87 per cent), frequency (83 per cent) and reliability (82 per cent)
- Whilst overall journey satisfaction was high, 40 per cent of passengers did spontaneously suggest an improvement to their journey. These varied by network but mostly concerned seating and capacity, the design, comfort and condition, and frequency and routes of the trams

- 6 per cent of passengers experienced a delay to their journey in 2018 (2017: 8 per cent), and when delayed the average length of delays was 9 minutes (2017: 12 minutes)
- 11 per cent of passengers were troubled by the behaviour of other passengers. When there was cause for concern this related mostly to rowdy behaviour
- 45 per cent of passengers were using the tram to commute, with 40 per cent commuting to work and 5 per cent to education
- The profile of tram passengers remains quite young, with 32 per cent aged 16-34. Blackpool has the oldest profile with over half (51 per cent) aged 60 or over.

Passenger experience in 2018 across the networks (%)

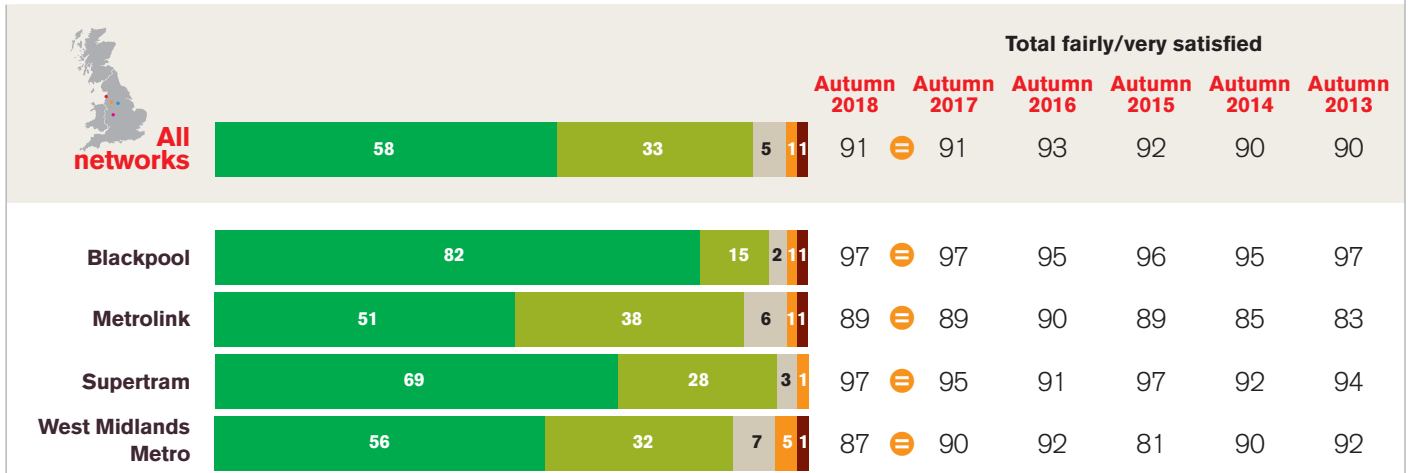|	All networks*	Blackpool Transport*	Manchester Metrolink	Sheffield SUPERTRAM	West Midlands Metro
Satisfaction with key measures:					
Overall journey	91 ⊖	97 ⊖	89 ⊖	97 ⊖	87 ⊖
Value for money	68 ⊖	91 ⊖	60 ⊖	77 ⊖	71 ⊖
Punctuality	89 ⊖	93 ⊖	89 ⊖	87 ⬆	87 ⬇
Overall stop	91 ⊖	94 ⬆	90 ⊖	94 ⬆	92 ⊖
Satisfaction with other measures which make a satisfactory or great journey:**					
Length of time waiting for the tram	88 ⊖	95 ⊖	86 ⊖	89 ⊖	88 ⬇
Space to sit / stand on board	73 ⊖	85 ⊖	68 ⬇	89 ⬆	69 ⊖
Comfort of the seats	74 ⊖	92 ⬆	71 ⊖	87 ⊖	55 ⊖
Amount of personal space on board	71 ⊖	86 ⊖	67 ⬇	85 ⬆	64 ⊖
Smoothness of tram journey	82 ⬆	94 ⊖	81 ⬆	89 ⊖	73 ⊖
Temperature on board	82 ⊖	92 ⊖	80 ⊖	88 ⊖	74 ⊖

*All networks includes different networks each year.
**Drivers of satisfaction differ by network. The most common drivers across TPS are shown here

⬆ Statistically significant increase since 2017   ⊖ No change   ⬇ Statistically significant decrease since 2017

Overall satisfaction (%)

		Total fairly/very satisfied					
		Autumn 2018	Autumn 2017	Autumn 2016	Autumn 2015	Autumn 2014	Autumn 2013
All networks	58 / 33 / 5 / 1 / 1	91 ⊜	91	93	92	90	90
Blackpool	82 / 15 / 2 / 1 / 1	97 ⊜	97	95	96	95	97
Metrolink	51 / 38 / 6 / 1 / 1	89 ⊜	89	90	89	85	83
Supertram	69 / 28 / 3 / 1	97 ⊜	95	91	97	92	94
West Midlands Metro	56 / 32 / 7 / 5 / 1	87 ⊜	90	92	81	90	92

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?**
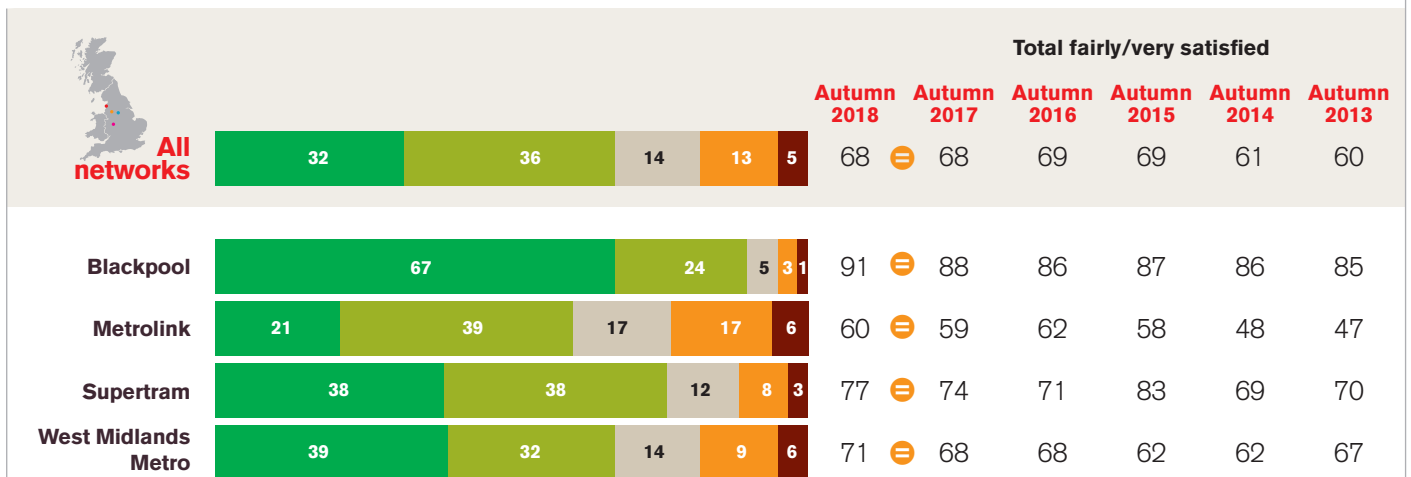
Base: All passengers – 4834 (All networks), 514 (Blackpool), 2969 (Metrolink), 807 (Supertram), 544 (West Midlands Metro)

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

⬆ Statistically significant increase since 2017　⊜ No change　⬇ Statistically significant decrease since 2017

Value for money – fare-payers only (%)

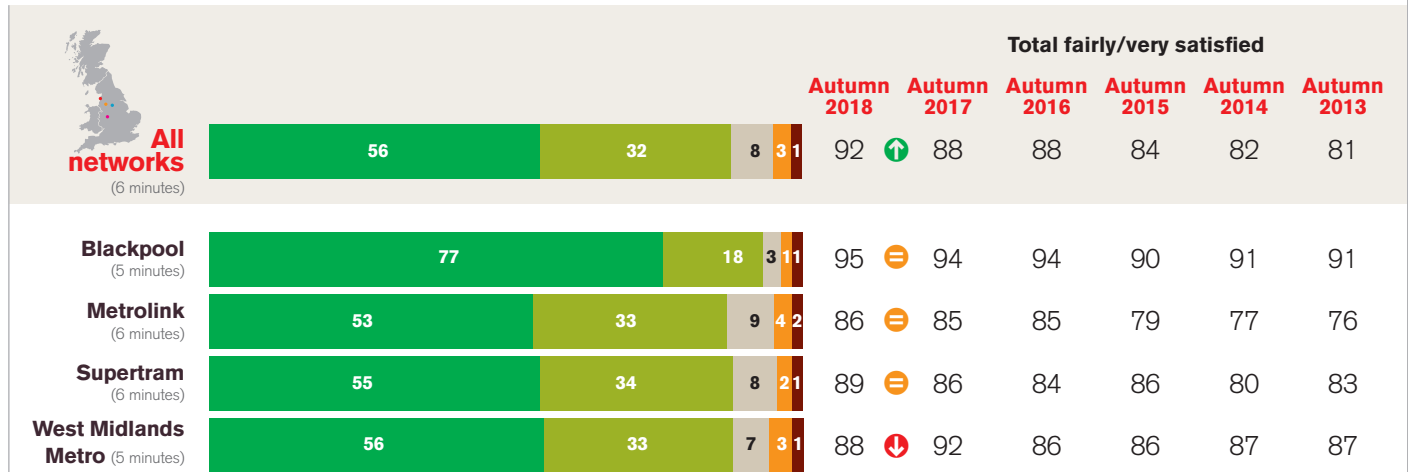|		Total fairly/very satisfied					
		Autumn 2018	Autumn 2017	Autumn 2016	Autumn 2015	Autumn 2014	Autumn 2013
All networks	32 / 36 / 14 / 13 / 5	68 ⊜	68	69	69	61	60
Blackpool	67 / 24 / 5 / 3 / 1	91 ⊜	88	86	87	86	85
Metrolink	21 / 39 / 17 / 17 / 6	60 ⊜	59	62	58	48	47
Supertram	38 / 38 / 12 / 8 / 3	77 ⊜	74	71	83	69	70
West Midlands Metro	39 / 32 / 14 / 9 / 6	71 ⊜	68	68	62	62	67

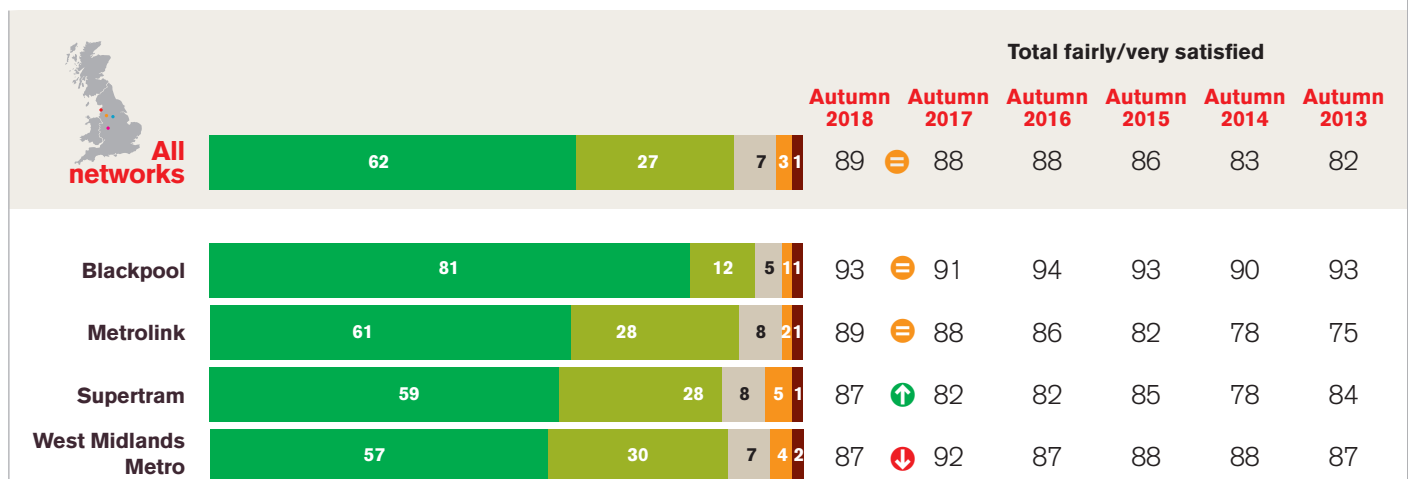**Q** **How satisfied were you with the value for money of your journey?**

Base: all passengers – 3092 (All networks), 412 (Blackpool), 1821 (Metrolink), 487 (Supertram), 372 (West Midlands Metro)

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

⬆ Statistically significant increase since 2017　⊜ No change　⬇ Statistically significant decrease since 2017

⏳ Satisfaction with waiting time (%)

		Total fairly/very satisfied					
		Autumn 2018	Autumn 2017	Autumn 2016	Autumn 2015	Autumn 2014	Autumn 2013
All networks (6 minutes)	56 / 32 / 8 / 3 / 1	92 ⬆	88	88	84	82	81
Blackpool (5 minutes)	77 / 18 / 3 / 1 / 1	95 ⊜	94	94	90	91	91
Metrolink (6 minutes)	53 / 33 / 9 / 4 / 2	86 ⊜	85	85	79	77	76
Supertram (6 minutes)	55 / 34 / 8 / 2 / 1	89 ⊜	86	84	86	80	83
West Midlands Metro (5 minutes)	56 / 33 / 7 / 3 / 1	88 ⬇	92	86	86	87	87

Average reported waiting time displayed in brackets

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

Base: all passengers – 4722 (All networks), 495 (Blackpool), 2900 (Metrolink), 788 (Supertram), 539 (West Midlands Metro)

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

Statistically significant reduction in waiting time since 2017

⬆ Statistically significant increase since 2017 ⊜ No change ⬇ Statistically significant decrease since 2017

⏱ Satisfaction with punctuality of the tram (%)

		Total fairly/very satisfied					
		Autumn 2018	Autumn 2017	Autumn 2016	Autumn 2015	Autumn 2014	Autumn 2013
All networks	62 / 27 / 7 / 3 / 1	89 ⊜	88	88	86	83	82
Blackpool	81 / 12 / 5 / 1 / 1	93 ⊜	91	94	93	90	93
Metrolink	61 / 28 / 8 / 2 / 1	89 ⊜	88	86	82	78	75
Supertram	59 / 28 / 8 / 5 / 1	87 ⬆	82	82	85	78	84
West Midlands Metro	57 / 30 / 7 / 4 / 2	87 ⬇	92	87	88	88	87

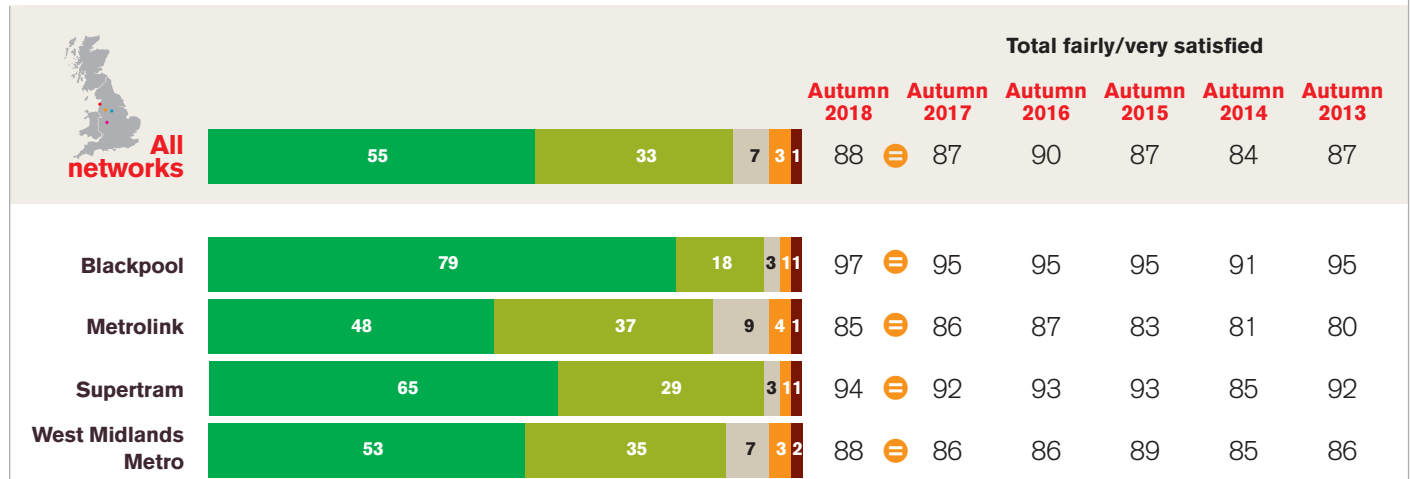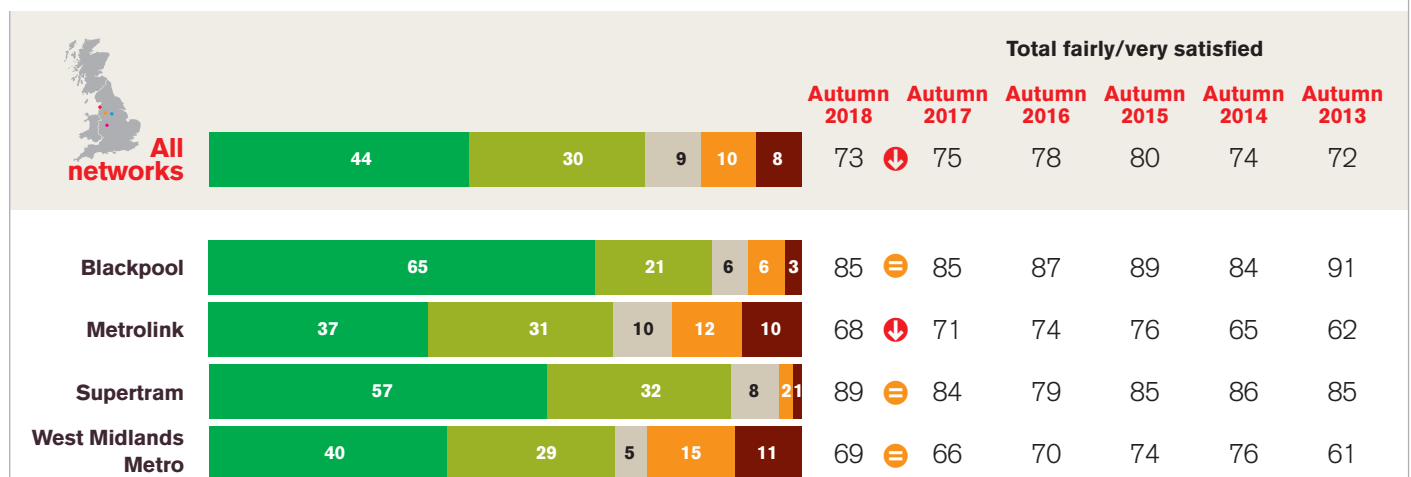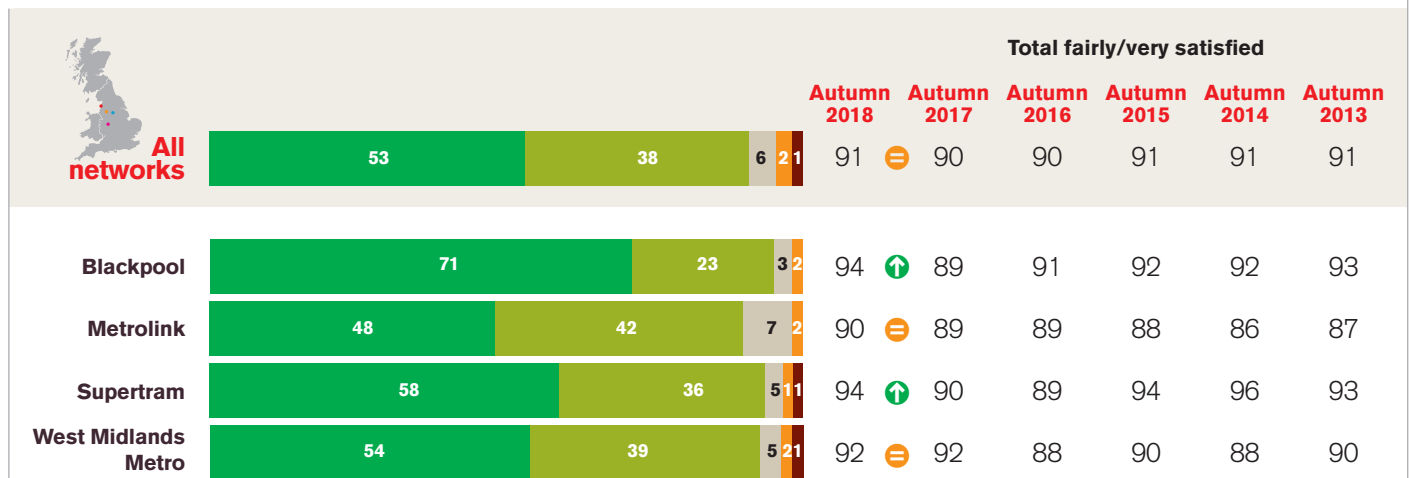**Q How satisfied were you with the punctuality of the tram?**

Base: all passengers – 4483 (All networks), 449 (Blackpool), 2769 (Metrolink), 744 (Supertram), 521 (West Midlands Metro)

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

⬆ Statistically significant increase since 2017 ⊜ No change ⬇ Statistically significant decrease since 2017

Satisfaction with on-tram journey time (%)

							Total fairly/very satisfied					
							Autumn 2018	Autumn 2017	Autumn 2016	Autumn 2015	Autumn 2014	Autumn 2013
All networks	55	33	7	3	1		88 ⊖	87	90	87	84	87
Blackpool	79	18	3	1	1		97 ⊖	95	95	95	91	95
Metrolink	48	37	9	4	1		85 ⊖	86	87	83	81	80
Supertram	65	29	3	1	1		94 ⊖	92	93	93	85	92
West Midlands Metro	53	35	7	3	2		88 ⊖	86	86	89	85	86

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

Base: all passengers – 4750 (All networks), 495 (Blackpool), 2928 (Metrolink), 793 (Supertram), 534 (West Midlands Metro)

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

⬆ Statistically significant increase since 2017   ⊖ No change   ⬇ Statistically significant decrease since 2017

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

							Total fairly/very satisfied					
							Autumn 2018	Autumn 2017	Autumn 2016	Autumn 2015	Autumn 2014	Autumn 2013
All networks	44	30	9	10	8		73 ⬇	75	78	80	74	72
Blackpool	65	21	6	6	3		85 ⊖	85	87	89	84	91
Metrolink	37	31	10	12	10		68 ⬇	71	74	76	65	62
Supertram	57	32	8	2	1		89 ⊖	84	79	85	86	85
West Midlands Metro	40	29	5	15	11		69 ⊖	66	70	74	76	61

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 – 4737 (All networks), 501 (Blackpool), 2909 (Metrolink), 790 (Supertram), 537 (West Midlands Metro)

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

⬆ Statistically significant increase since 2017   ⊖ No change   ⬇ Statistically significant decrease since 2017

Satisfaction with the tram stop (%)

			Total fairly/very satisfied					
			Autumn 2018	Autumn 2017	Autumn 2016	Autumn 2015	Autumn 2014	Autumn 2013
All networks	53 / 38 / 6 / 2 / 1		91 ⊖	90	90	91	91	91
Blackpool	71 / 23 / 3 / 2		94 ⬆	89	91	92	92	93
Metrolink	48 / 42 / 7 / 2		90 ⊖	89	89	88	86	87
Supertram	58 / 36 / 5 / 1 / 1		94 ⬆	90	89	94	96	93
West Midlands Metro	54 / 39 / 5 / 2 / 1		92 ⊖	92	88	90	88	90

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

Base: all passengers – 4776 (All networks), 503 (Blackpool), 2925 (Metrolink), 799 (Supertram), 548 (West Midlands Metro)

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

⬆ Statistically significant increase since 2017   ⊖ No change   ⬇ Statistically significant decrease since 2017

Our aim

Transport Focus wanted to measure tram passenger journey satisfaction for four tram networks in Britain:
• Blackpool
• Manchester Metrolink
• Midland Metro (Birmingham/Wolverhampton)
• Sheffield Supertram.

A detailed overview report together with individual reports for each tram network are available on Transport Focus's website via **http://bit.ly/tram-passenger-survey**. This report shows statistically significant differences compared to the autumn 2017 Tram Passenger Survey.

Since the 2017 fieldwork, there was a change to the Supertram network with the introduction of the Sheffield tram-train route in October 2018 linking Cathedral to Rotherham Parkgate.

Blackpool Transport, Transport for Greater Manchester (Manchester Metrolink), Transport for West Midlands (West Midlands Metro), and South Yorkshire PTE (Sheffield Supertram) contributed funding to the research to allow for a larger, more robust sample to be undertaken on their networks.

How we did it

Fieldwork:
7 September to 8 December 2018 (with a gap for half term between 22 October and 4 November, depending on the area). In 2017 fieldwork took place between 18 September and 8 December.

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:** 514 interviews (457 paper and 57 online)
- **Manchester Metrolink:** 2987 interviews (2415 paper and 572 online)
- **West Midlands Metro:** 554 interviews (393 paper and 161 online)
- **Sheffield Supertram:** 809 interviews (726 paper and 83 online)

Research agency: AECOM

The networks in context: Autumn 2018

	The network	Passenger journeys*	Ticket purchasing	Information at stops	Frequency	Engineering disruptions/other notes
Blackpool Transport	1 line 38 stops 11 miles	5.2* million	✘ TVMs at stops ✔ Conductors onboard	✔ Info boards at stops (TTs, fares) ✘ Passenger info displays	Mon-Sat: every 15-30 mins Sun: 15-30 mins	• Blackpool illuminations 30 Aug to 3 Nov 2018 • Heritage trams operate bank holidays, weekends and summer; not covered in this research • No significant issues affected fieldwork
Manchester Metrolink	7 lines 93 stops 57 miles	42.8** million	✔ TVMs at stops ✘ Conductors onboard	✔ Info boards at stops (TTs, fares) ✔ Passenger info displays *(Not all stops on Bury and Altrincham lines)*	Mon-Sat: every 6-12 mins Sun: 12-15 mins	• Airport line opened late 2014, covered in 2015 • Exchange Square and link with Victoria opened in December 2015 • Increasing use of double carriage trams • Second City Crossing opened in February 2017 enabling quicker journeys across the city • A tram collision on the 10 November 2017 affected two shifts which were rescheduled due to no trams running
Sheffield Supertram	4 lines 50 stops 22 miles	12.3* million	✘ TVMs at stops ✔ Conductors onboard	✔ Info boards at stops (TTs, fares) ✘ Passenger info displays	Mon-Sat: every 5-20 mins Sun: 10-20 mins	• New Train Tram extension to the Network opened late-Oct 2018 including two new stops. Some shifts were held back so they could be completed on the new line in November 2018 • Additional consultation (not part of this research) was held on the network which coincided with this fieldwork period (Sep – Oct 2018)
West Midlands Metro	1 line 26 stops 13 miles	5.7* million	✔ TVMs at stops ✔ Conductors onboard	✔ Info boards at stops (TTs, fares) ✔ Passenger info displays	Mon-Sat: every 6-15 mins Sun: 15 mins	• Network extension to Grand Central (New Street Station) opened on 30 May 2016 and was included in the TPS 2016 • Network improvement works meant that two tram stops at the Wolverhampton end of the route were closed for the duration of fieldwork in 2017 (Wolverhampton St George's and The Royal)

*Source: Department for Transport, *Passenger journeys on light rail and trams by system in England, 2017/18*
**Source: Direct from operator

Methodology – 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 2017 comparison
This report shows results from Autumn 2018 at the 'All networks' level only. Full 2018 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 from 2017.

Weighting
This was based on passenger count information collected by the interviewer during each interviewer shift. The weighting matrix used the following weighting cells:
- Tram network: for Manchester Metrolink and Sheffield Supertram this was by line
- Age: 16-34, 35-59, 60+
- Gender: male, female
- Time/day travelled: weekday peak, weekday off peak and weekend.

A rim weight by volume of passengers using each network was also applied. This was sourced from Department for Transport (DfT) data for Blackpool, West Midlands Metro and Sheffield Supertram. Data for Metrolink was sourced from the network, to provide the most up-to-date figures for each of their lines.

The full details of the weighting matrix can be found in the TPS Autumn 2018 technical report.

Methodology – themes that are affecting overall passenger satisfaction charts
The approach to identifying themes that affect overall passenger satisfaction is split into two stages. At the first stage, we took all 25 individual satisfaction measures from the survey (apart from the overall journey satisfaction) and formed them into themes using a statistical technique known as factor analysis, which groups together those satisfaction measures that are responded to similarly within the data. For instance, where high or low scores are given for measure 'x', there tends to be a similar rating for measures 'y' and 'z', so the 'factor' or theme becomes 'A'. Through this process we identified ten themes, which are shown below, alongside measures that formed each theme:
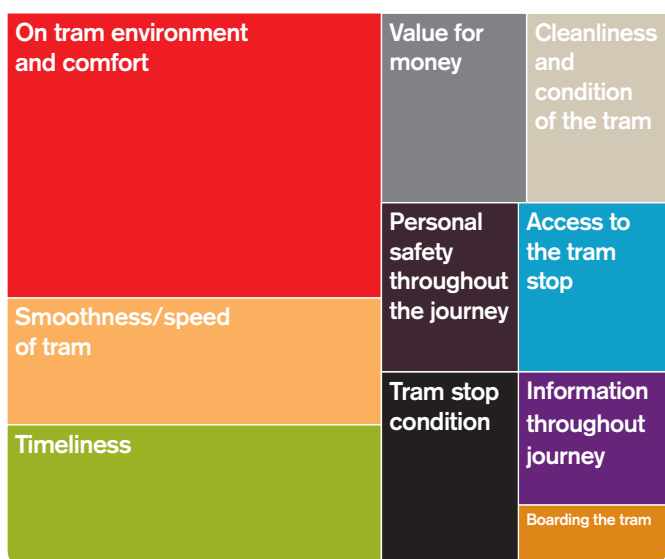
Theme (factor)	Questions
1 On tram environment and comfort	• Sufficient room for all the passengers to sit/stand • The comfort of the seats • The amount of personal space you had around you • Provision of grab rails to hold on to when standing/moving about the tram • The temperature inside the tram
2 Tram stop condition	• Its general condition/standard of maintenance • Its freedom from graffiti/vandalism • Its freedom from litter
3 Boarding the tram	• The ease of getting on to and off of the tram • The length of time it took to board the tram
4 Timeliness	• The length of time you had to wait for the tram • The punctuality of the tram
5 Access to the tram stop	• Its distance from your journey start e.g. home, shops • The convenience/accessibility of its location
6 Personal safety throughout journey	• Behaviour of fellow passengers waiting at the stop • Your personal safety whilst at the tram stop • Your personal security whilst on the tram
7 Cleanliness and condition of the tram	• The cleanliness and condition of the outside of the tram • The cleanliness and condition of the inside of the tram
8 Smoothness/ speed of the tram	• The amount of time the journey took • Smoothness/freedom from jolting during the journey
9 Information throughout journey	• The information provided at the tram stop • Route/destination information on the outside of the tram • The information provided inside the tram
10 Value for money	• How satisfied were you with the value for money of your tram journey?

For the second stage, these themes were then used to identify how much effect each one has on passengers' rating for overall journey satisfaction, by means of a key driver analysis.

The square diagrams show the proportional influence that each theme has on satisfaction for that area/operator. They should be read like a pie chart where the slices or portions are relative to each other and together add up to 100%. So, in the example below, the theme of 'on tram environment and comfort' which is shaded red, has the greatest influence on satisfaction, followed by 'smoothness/speed of tram', while themes such as 'boarding the tram' and 'information throughout journey' have relatively less influence here.

This analysis was conducted on fare-paying passengers only, so that the influence of value for money could be included. It also combines data from 2018 and 2017 surveys to increase robustness. The analysis 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.

There are noticeable and interesting differences in the impact of different themes between the various tram networks.

On tram environment and comfort	Value for money	Cleanliness and condition of the tram
Smoothness/speed of tram	Personal safety throughout the journey	Access to the tram stop
Timeliness	Tram stop condition	Information throughout journey / Boarding the tram

Contact Transport Focus

Any queries about this research
should be addressed to:
Insight@transportfocus.org.uk
www.transportfocus.org.uk

Fleetbank House
2-6 Salisbury Square
London
EC4Y 8JX

Transport Focus is the operating
name of the Passengers' Council

Transport Focus is the independent consumer organisation representing the interests of:

- all users of England's motorways and major 'A' roads (the Strategic Road Network)
- rail passengers in Great Britain
- bus, coach and tram users across England outside London.

We work to make a difference for all transport users