

**Agenda Item**

**GNLRT ADVISORY COMMITTEE**

**15<sup>th</sup> March 2011**

# OsirisMR

**NET Customer Satisfaction Survey: Executive Summary  
November 2010**

## **Background & Methodology**

For the seventh year running, a comprehensive survey was carried out amongst NET tram travellers, this year during October 2010, to gauge, amongst other things, Customer Satisfaction and usage of the tram system in Nottingham.

Again, an on-site methodology was adopted with interviewers placed on trams to dispatch and subsequently collect questionnaires whilst journeying alongside travellers (NET customers). A pen was given to each respondent to complete their survey and to encourage participation an incentive of entry into a prize draw to win one of 50 FREE one-week tram travel passes was offered.

Quotas based on passenger loadings were used to obtain a representative sample from all times of day and types of traveller. Interviewers were thus placed on trams across each day of a typical week between Monday 18<sup>th</sup> October and Sunday 25<sup>th</sup> October. Interviewers dispatched and collected questionnaires whilst journeying alongside travellers (customers) for scheduled shifts between 7:30am and 6:30pm, weekdays Mondays to Fridays, 9am to 6:30pm Saturday and 11am to 6pm Sunday.

OsirisMR (formerly Keydata), an independent market research agency, was commissioned on behalf of Nottingham Tram Consortium, the operating company of NET to undertake fieldwork and analysis and subsequently report on the findings from this survey.

A total of 1542 completed surveys were achieved from this exercise, which form the basis of the following findings. Comparisons, where possible and applicable, have been made against the 2006, 2007, 2008 and 2009 results.

<b>Gender</b>	1392
Female	36%
Male	64%

<b>Age Group</b>	1416
Under 18 years	8%
18-24 years	25%
25-34 years	20%
35-44 years	14%
45-54 years	13%
55-64 years	13%
65+ years	8%

<b>Working Status</b>	1416
Working full time (30+ hrs)	45%
Working part time (<30 hrs)	14%
Full- or part-time student	19%
Unemployed	6%
Retired	12%
Keeping house	3%
Other	1%

<b>No of cars</b>	1085
None	51%
One	27%
Two	19%
Three +	3%

<b>Children Under 16</b>	1351
No	76%
Yes	24%

<b>Ever travel with a pram</b>	258
No	59%
Yes	41%

<b>Disability</b>	1377
Disability	9%
No disability	91%

<b>Mobility Difficulties</b>	1384
No difficulties	90%
Some difficulties	9%
Major difficulties	1%

<b>Ethnicity</b>	1379
White British/Irish etc	89%
Black or Black British - Caribbean	2%
Black or Black British - African	1%
Black or Black British - other	1%
Mixed White and Black - Caribbean	2%
Mixed White and Black - African	0%
Mixed White and Asian	0%
Mixed White and Black - other	0%
Asian or Asian-British - Indian	1%
Asian or Asian-British - Pakistani	1%
Asian or Asian-British - Bangladeshi	0%
Asian or Asian-British - other	0%
Chinese	0%
Other	2%

Boarding & Exit Places	Boarding %	Exit %
Basford	2.9%	2.0%
Beaconsfield Street	0.1%	1.2%
Bulwell	3.4%	6.0%
Bulwell Forest	0.9%	1.1%
Butlers Hill	1.8%	0.5%
Cinderhill	2.8%	1.3%
David Lane	2.5%	2.2%
Highbury Vale	0.9%	0.6%
Hucknall	23.2%	7.9%
Hyson Green	0.6%	2.3%
Lace Market	5.4%	4.4%
Moor Bridge	2.4%	1.4%
Noel Street	0.1%	1.3%
Nottingham (unspec)	1.1%	4.4%
Nottingham High School	0.4%	0.9%
Old Market Square	10.2%	17.1%
Phoenix Park	17.4%	6.8%
Radford Road	0.8%	0.4%
Royal Centre	1.7%	15.9%
Shipstone Street	0.2%	0.2%
Station Street	18.1%	7.2%
The Forest	1.0%	4.1%
Trent University	0.7%	8.2%
Wilkinson Street	1.4%	2.4%

Resident Postcode area	% respondents
NG1 - Nottingham Central	1%
NG2 - West Bridgford	2%
NG3 - Carlton	1%
NG4 - Gedling	1%
NG5 - Arnold/Sherwood	2%
NG6 - Bulwell	14%
NG7 - Radford/ Hyson Green	3%
NG8 - Bilborough	4%
NG9 - Beeston/ Stapleford	0%
NG10 - Long Eaton	0%
NG11 - Clifton	1%
NG12/13/14 - East Notts	1%
NG15 - Hucknall	15%
NG16 - Heanor	11%
NG17-NG22 - Mansfield & Ashfield	3%
DE - Derbyshire	4%
Unknown	31%
Other	5%
<b>Total</b>	<b>1542</b>

Did you Park and Ride today?	1519
Yes	31%
No	69%

How many people travelled to the Park and Ride site in your car?	459
One	61%
Two	29%
Three	6%
Four	3%
Five or more	1%

Frequency of ...	Commuting				School / College / University				Shopping and Other Leisure Activities			
	2010	2009	2008	2007	2010	2009	2008	2007	2010	2009	2008	2007
Every day	<b>47%</b>	40%	37%	51%	<b>22%</b>	30%	30%	35%	<b>3%</b>	5%	4%	5%
A no of times/week	<b>36%</b>	32%	34%	34%	<b>31%</b>	32%	33%	34%	<b>29%</b>	28%	28%	34%
Once a week	<b>4%</b>	9%	9%	6%	<b>7%</b>	5%	6%	14%	<b>30%</b>	29%	28%	28%
Once a month	<b>3%</b>	6%	6%	2%	<b>2%</b>	2%	3%	3%	<b>25%</b>	24%	25%	22%
Less frequently	<b>4%</b>	5%	7%	3%	<b>5%</b>	4%	10%	3%	<b>11%</b>	13%	13%	9%
Never	6%	8%	7%	4%	<b>34%</b>	27%	18%	10%	<b>4%</b>	2%	3%	3%

**Use other type of transport for commuting along the same route as the tram**

	Count			Percentage		
	2010	2009	2008	2010	2009	2008
Yes	<b>398</b>	571	558	52%	54%	51%
No	<b>374</b>	494	532	48%	46%	49%

**Frequency of transport use for commuting along same route as the tram**

	Base			Every Day			A no. of times/week			Once a week			Once a month			Never		
	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008
Bus	<b>478</b>	399	160	<b>26%</b>	38%	9%	<b>26%</b>	32%	7%	<b>8%</b>	9%	6%	<b>10%</b>	10%	13%	<b>30%</b>	11%	65%
Car	<b>418</b>	315	151	<b>22%</b>	35%	7%	<b>20%</b>	27%	5%	<b>12%</b>	11%	4%	<b>12%</b>	12%	14%	<b>33%</b>	15%	70%
Train	<b>433</b>	174	184	<b>7%</b>	13%	15%	<b>8%</b>	11%	8%	<b>5%</b>	5%	7%	<b>13%</b>	21%	13%	<b>67%</b>	51%	57%
Walking	<b>516</b>	205	146	<b>32%</b>	42%	8%	<b>17%</b>	22%	5%	<b>3%</b>	4%	3%	<b>3%</b>	2%	13%	<b>45%</b>	29%	71%
Cycling	<b>403</b>	146	132	<b>5%</b>	8%	3%	<b>5%</b>	8%	2%	<b>2%</b>	3%	4%	<b>3%</b>	6%	14%	<b>85%</b>	75%	77%
Other	<b>299</b>	92	104	<b>2%</b>	2%	1%	<b>3%</b>	7%	4%	<b>2%</b>	1%	4%	<b>2%</b>	2%	12%	<b>91%</b>	88%	80%

**If there wasn't a tram service, how would you travel?**

	Base			Bus			Car			Train			Walk			Cycling			Other		
	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008
	<b>1213</b>	1302	1838	<b>71%</b>	67%	49%	<b>37%</b>	38%	28%	<b>11%</b>	10%	7%	<b>16%</b>	18%	11%	<b>4%</b>	5%	4%	<b>2%</b>	2%	1%

**Use other type of transport for travelling to school, college or university along the same route as the tram**

	Count			Percent		
	2010	2009	2008	2010	2009	2008
Yes	<b>173</b>	174	161	<b>31%</b>	37%	41%
No	<b>387</b>	298	229	<b>69%</b>	63%	59%

**Frequency of transport use for travelling to school, college or university along same route as the tram**

	Base			Every Day			A no. of times/week			Once a week			Once a month			Never		
	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008
Bus	<b>366</b>	288	234	<b>23%</b>	22%	26%	<b>19%</b>	26%	19%	<b>7%</b>	8%	9%	<b>5%</b>	5%	5%	<b>47%</b>	39%	42%
Car	<b>271</b>	209	152	<b>12%</b>	18%	13%	<b>13%</b>	16%	15%	<b>6%</b>	6%	5%	<b>6%</b>	5%	5%	<b>63%</b>	55%	62%
Train	<b>240</b>	178	147	<b>5%</b>	6%	14%	<b>3%</b>	6%	12%	<b>4%</b>	2%	5%	<b>4%</b>	8%	6%	<b>84%</b>	78%	63%
Walking	<b>286</b>	152	136	<b>29%</b>	26%	18%	<b>10%</b>	13%	13%	<b>4%</b>	3%	5%	<b>0%</b>	1%	4%	<b>57%</b>	57%	60%
Cycling	<b>233</b>	120	116	<b>2%</b>	8%	16%	<b>2%</b>	3%	9%	<b>1%</b>	1%	4%	<b>3%</b>	0%	4%	<b>92%</b>	88%	66%
Other	<b>197</b>	106	102	<b>3%</b>	0%	13%	<b>1%</b>	1%	7%	<b>0%</b>	2%	3%	<b>1%</b>	1%	5%	<b>95%</b>	96%	73%

**If there wasn't a tram service, how would you travel?**

	Base			Bus			Car			Train			Walk			Cycling			Other		
	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008
	<b>410</b>	388	447	<b>68%</b>	66%	51%	<b>25%</b>	30%	22%	<b>7%</b>	9%	8%	<b>21%</b>	18%	15%	<b>5%</b>	4%	4%	<b>3%</b>	2%	1%

**Use other type of transport for shopping and other leisure activities along the same route as the tram**

	Count			Percent		
	2010	2009	2008	2010	2009	2008
Yes	<b>655</b>	678	580	<b>58%</b>	55%	55%
No	<b>468</b>	448	469	<b>42%</b>	45%	45%

**Frequency of transport use for shopping and other leisure activities along same route as the tram**

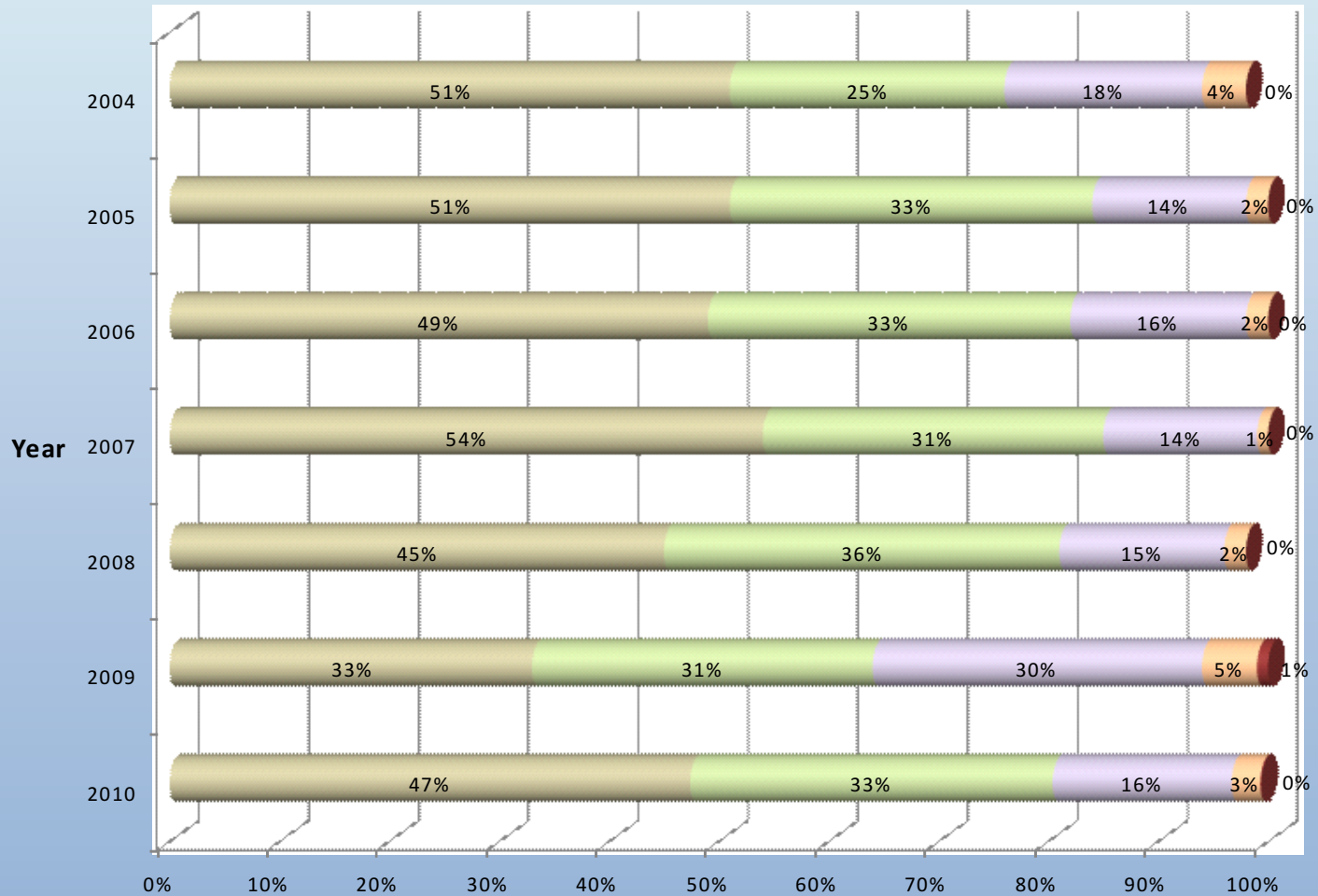
	Base			Every Day			A no. of times/week			Once a week			Once a month			Never		
	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008
Bus	<b>418</b>	444	398	<b>17%</b>	19%	16%	<b>30%</b>	28%	32%	<b>20%</b>	21%	19%	<b>18%</b>	16%	21%	<b>15%</b>	16%	12%
Car	<b>397</b>	432	235	<b>16%</b>	16%	10%	<b>27%</b>	29%	28%	<b>25%</b>	22%	18%	<b>22%</b>	25%	23%	<b>9%</b>	9%	21%
Train	<b>182</b>	198	173	<b>4%</b>	5%	6%	<b>4%</b>	5%	28%	<b>5%</b>	8%	17%	<b>14%</b>	17%	21%	<b>72%</b>	65%	28%
Walking	<b>242</b>	245	220	<b>21%</b>	21%	12%	<b>26%</b>	26%	34%	<b>7%</b>	14%	15%	<b>7%</b>	5%	17%	<b>39%</b>	35%	22%
Cycling	<b>178</b>	177	165	<b>4%</b>	2%	7%	<b>6%</b>	6%	28%	<b>4%</b>	2%	17%	<b>5%</b>	6%	19%	<b>80%</b>	84%	29%
Other	<b>127</b>	145	126	<b>0%</b>	0%	4%	<b>5%</b>	1%	28%	<b>0%</b>	5%	15%	<b>5%</b>	4%	22%	<b>91%</b>	90%	31%

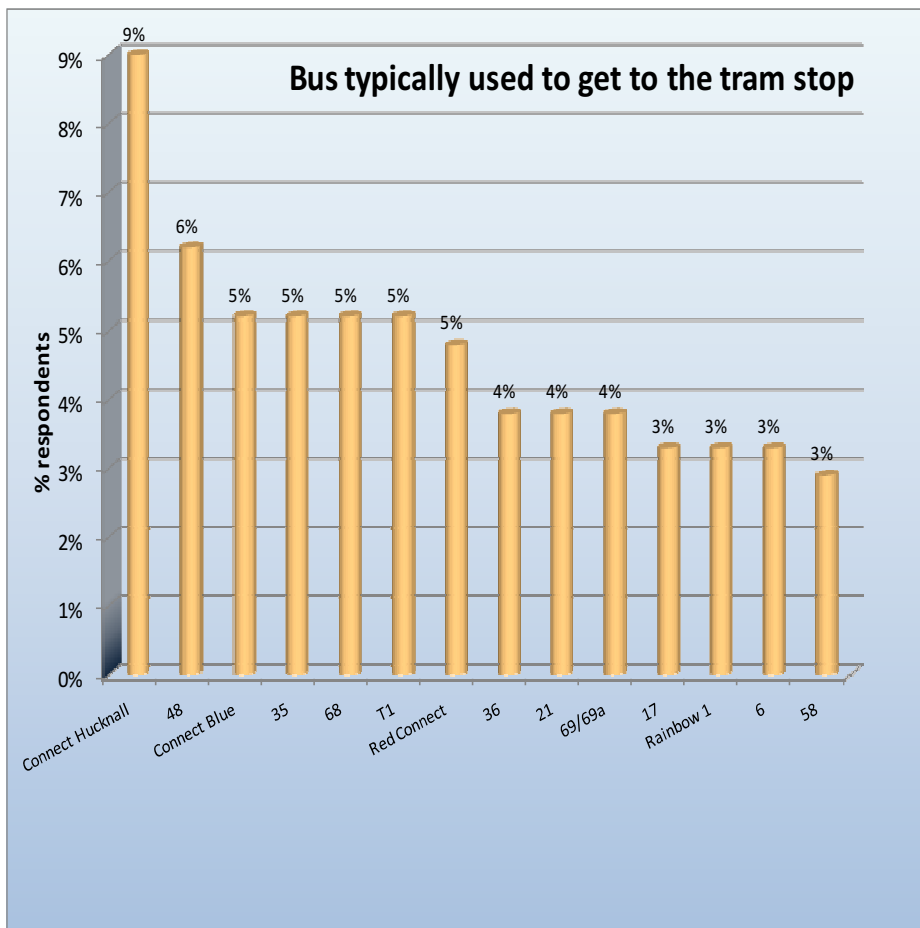
**If there wasn't a tram service, how would you travel?**

	Base			Bus			Car			Train			Walk			Cycling			Other		
	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008	2010	2009	2008
	<b>1041</b>	1075	1443	<b>64%</b>	60%	45%	<b>54%</b>	51%	36%	<b>15%</b>	18%	5%	<b>8%</b>	8%	13%	<b>3%</b>	3%	2%	<b>0%</b>	1%	0%

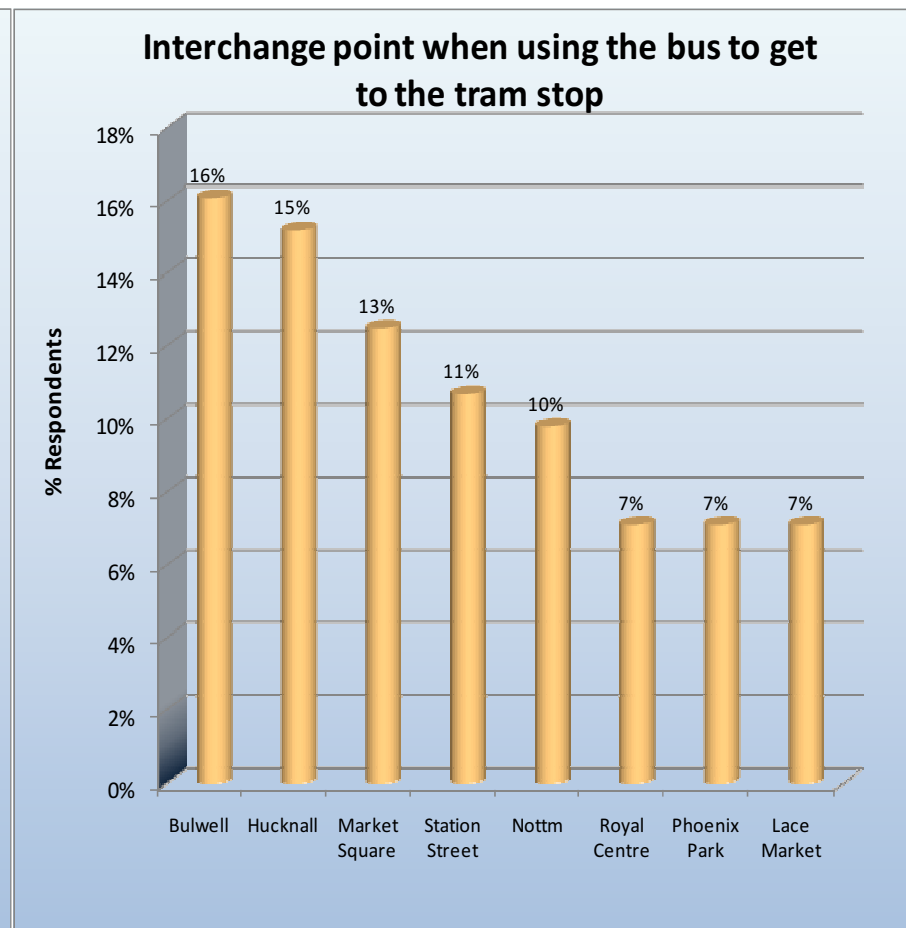


## How do you normally get to the tram stop? (year by year comparison)

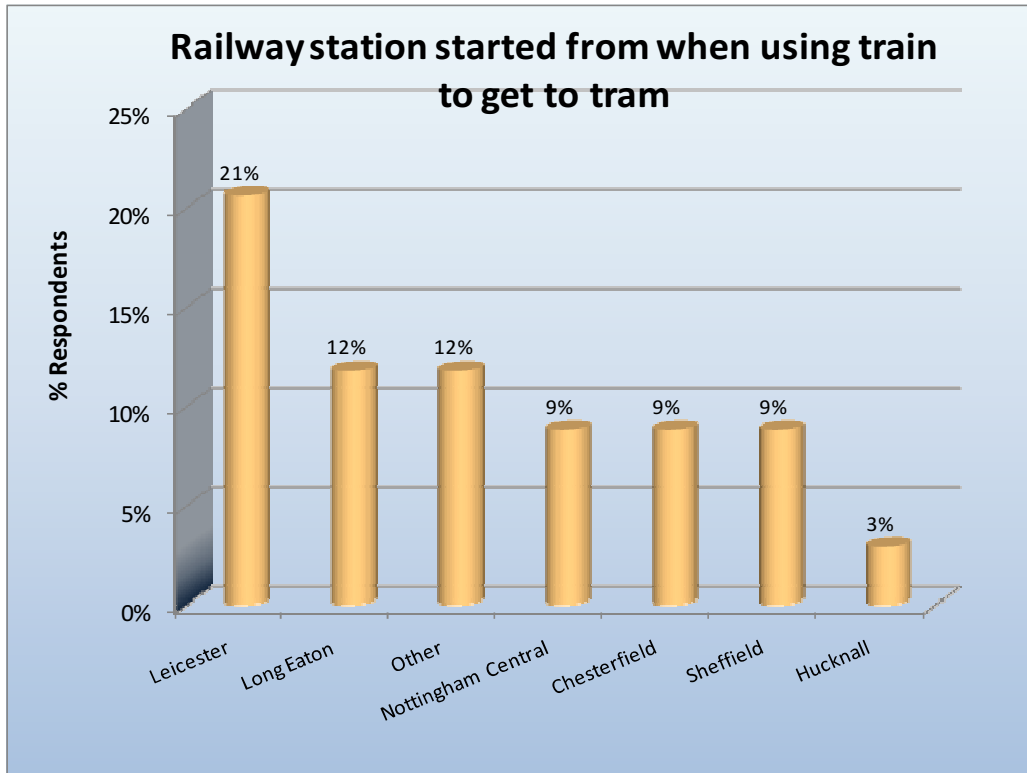




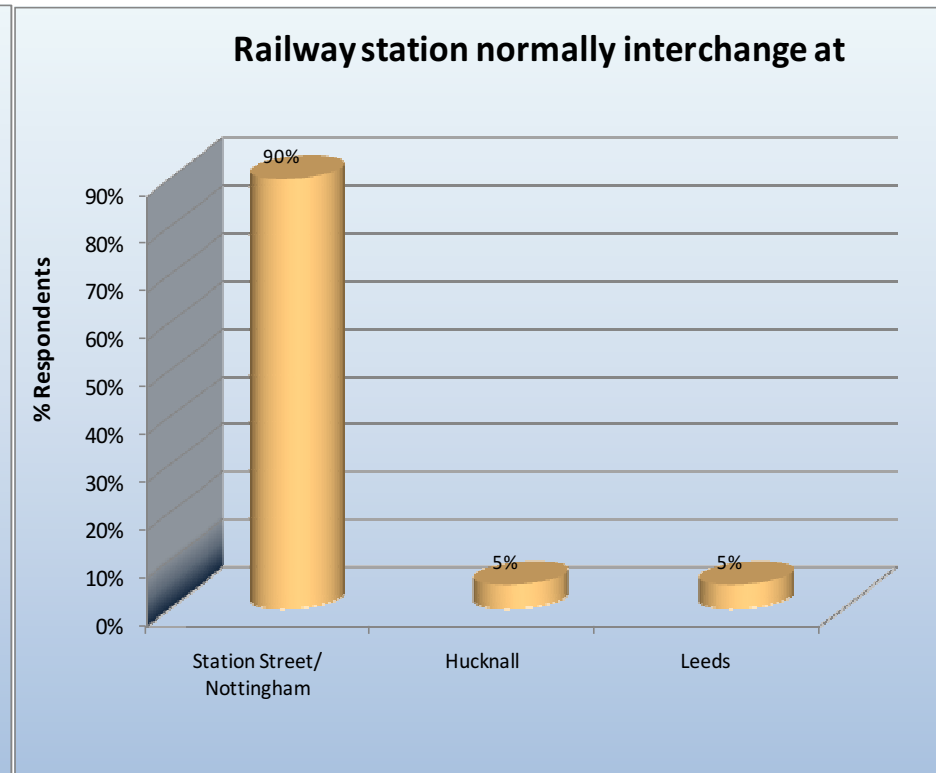
Base=210



Base=112



Base=34



Base=20

## Satisfaction at Tram stop

	Base				Net Satisfaction				x̄	Variance	x̄	Variance	x̄	Variance	x̄	Variance
	2010	2009	2008	2007	2010	2009	2008	2007	2010	2010	2009	2009	2008	2008	2007	2007
Overall at Tram Stop	-	-	-	-	<b>77%</b>	78%	78%	75%	<b>4.11</b>	-	4.08	0.43	4.08	-	4.08	-
Passenger info	<b>1398</b>	1321	1323	1342	<b>89%</b>	92%	84%	92%	<b>4.37</b>	<b>0.52</b>	4.39	0.84	4.35	0.70	4.39	0.44
Security at P&R sites	<b>937</b>	842	1024	897	<b>62%</b>	57%	70%	53%	<b>3.84</b>	<b>0.81</b>	3.75	0.55	3.82	0.93	3.72	0.95
Cleanliness/condition	<b>1404</b>	1321	1295	1328	<b>89%</b>	87%	81%	86%	<b>4.29</b>	<b>0.47</b>	4.28	0.03	4.26	0.71	4.23	0.52
Tram stop shelters	<b>1230</b>	1071	1076	1108	<b>69%</b>	69%	77%	71%	<b>3.94</b>	<b>0.81</b>	3.92	0.74	4.07	0.63	3.95	0.74
Electronic displays	<b>1395</b>	1316	1292	1325	<b>91%</b>	93%	85%	94%	<b>4.45</b>	<b>0.49</b>	4.48	0.43	4.40	0.74	4.49	0.39
Security on route to tram stop	<b>1354</b>	1283	1273	1300	<b>65%</b>	63%	66%	60%	<b>3.93</b>	<b>0.82</b>	3.89	0.85	3.64	0.99	3.83	0.85
Lighting	<b>1210</b>	1051	1069	1089	<b>82%</b>	81%	78%	81%	<b>4.11</b>	<b>0.57</b>	4.06	0.54	4.11	0.61	4.08	0.56
Litter bins	<b>1193</b>	1038	1073	1090	<b>72%</b>	71%	76%	69%	<b>3.97</b>	<b>0.69</b>	3.92	0.65	4.03	0.64	3.92	0.69

\*The average score is based on the following scale:

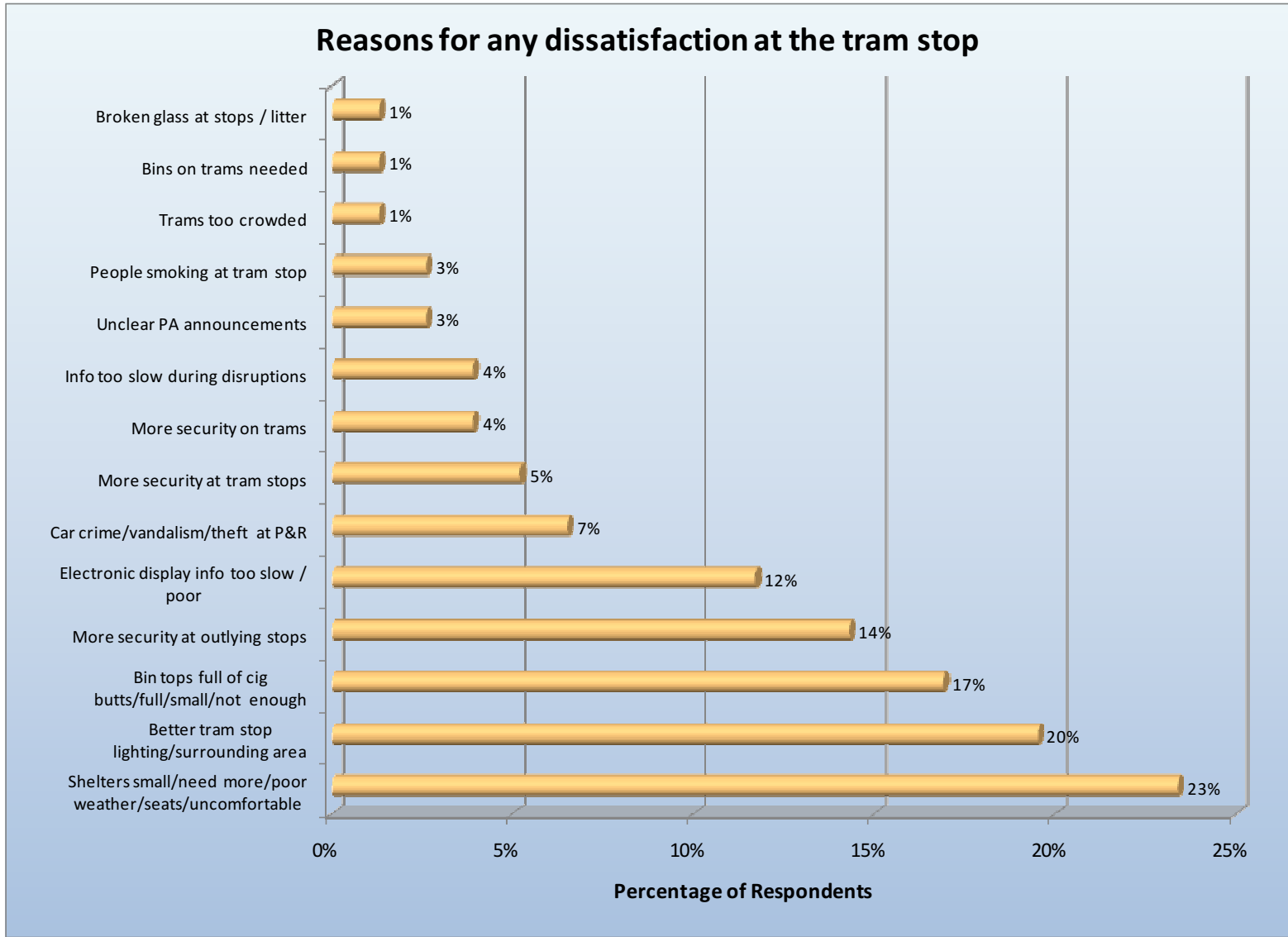
1 - Very Dissatisfied
2 - Dissatisfied
3 - Neither Satisfied nor Dissatisfied
4 - Satisfied
5 - Very Satisfied

## Satisfaction Overall onboard the Tram and Journey

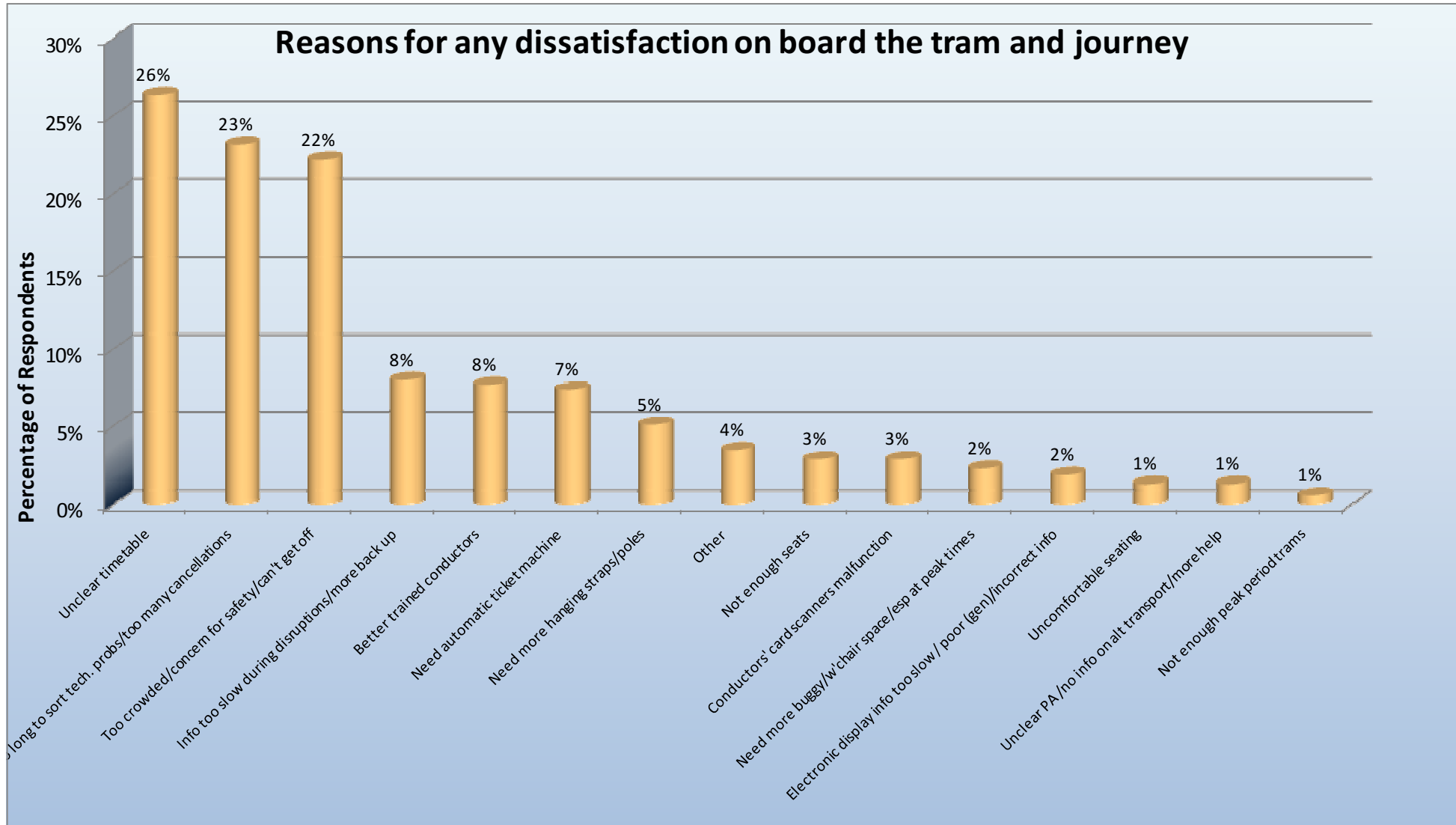
	Base				Net Satisfaction				Ave Score	Variance	Ave Score	Variance	Ave Score	Variance	Ave Score	Variance
	2010	2009	2008	2007	2010	2009	2008	2007	2010	2010	2009	2009	2008	2008	2007	2007
Overall onboard	-	-	-	-	76%	71%	77%	75%	4.09	-	4.08	-	4.08	-	4.07	-
Price/range of tickets	1330	1170	1190	999	49%	57%	67%	47%	3.69	1.15	3.79	1.02	3.70	1.06	3.63	1.18
Reliability	1179	1084	1103	1119	86%	85%	81%	88%	4.26	0.57	4.26	0.60	4.22	0.80	4.28	0.55
Ease of buying a ticket	1112	1042	1066	898	86%	87%	80%	86%	4.23	0.53	4.24	0.50	4.21	0.69	4.21	0.53
Ease of getting on/off	1413	1275	1276	1309	87%	88%	82%	85%	4.33	0.56	4.35	0.52	4.26	0.83	4.27	0.64
Cleanliness inside	1409	1216	1240	1311	87%	86%	81%	84%	4.24	0.52	4.23	0.54	4.24	0.70	4.19	0.55
Disruptions information	1283	1125	1164	1210	59%	66%	73%	71%	3.86	1.11	3.94	0.89	3.93	0.94	3.98	0.79
Disruptions resolution	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a
Journey time	1177	1082	1094	1119	87%	85%	80%	88%	4.25	0.50	4.24	4.24	4.21	0.75	4.28	0.49
Air conditioning	1125	1053	1050	1085	67%	63%	72%	61%	3.92	0.76	3.87	3.87	3.89	0.87	3.84	1.02
Seating comfort	1168	1077	1088	1122	65%	68%	73%	60%	3.87	0.82	3.91	3.91	3.92	0.83	3.81	0.88
Printed timetable leaflet	1074	1016	1041	866	80%	80%	77%	80%	4.09	0.56	4.09	4.09	4.07	0.73	4.1	0.56
Staff friendly / helpful	1414	1280	1295	1330	92%	92%	83%	92%	4.38	0.45	4.40	4.40	4.33	0.67	4.37	0.43
Buggies/disabled provision	1180	1051	1081	851	70%	68%	75%	62%	4.00	0.80	3.96	3.96	3.98	0.86	3.88	0.91

\*The average score is based on the following scale:

1 - Very Dissatisfied
2 - Dissatisfied
3 - Neither Satisfied nor Dissatisfied
4 - Satisfied
5 - Very Satisfied

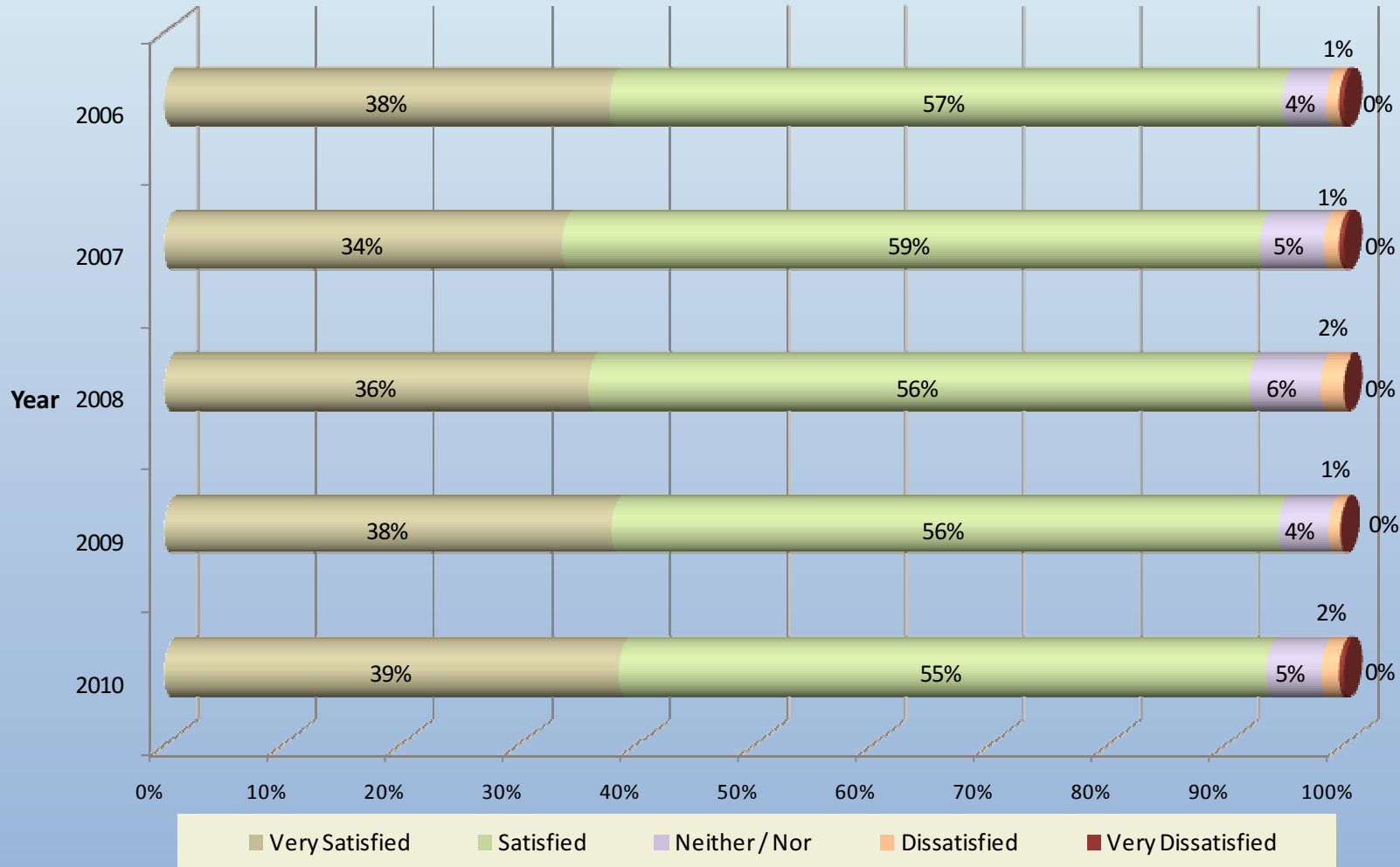


Base=77



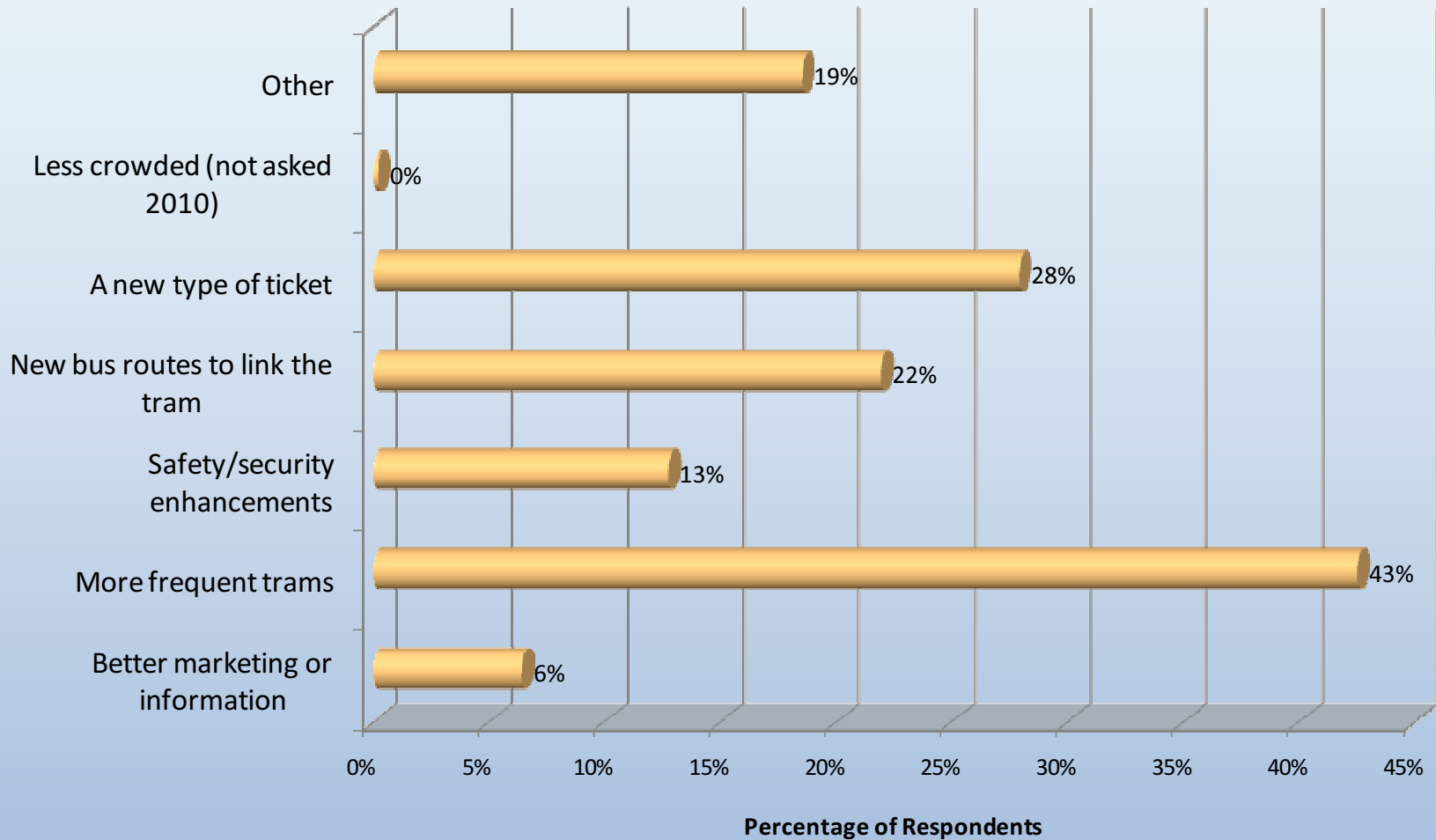
Base=311

## Satisfaction with overall service received on tram journey (year by year comparison)





## Is there anything that would help you to use the tram more?



Base=612

<b>More frequent trams: When?</b>	
Later finishing trams / late night trams/weekend	73
More frequent peak time services / rush hour	56
More morning trams	23
Every 5/10 minutes	17
Earlier start times / before 6am	8
More frequent trams (gen/unspec)	4
More frequent to Phoenix Park	2
More evening trams /to end destination/nights	2
More daytime trams (gen)	2
More weekend trams	2

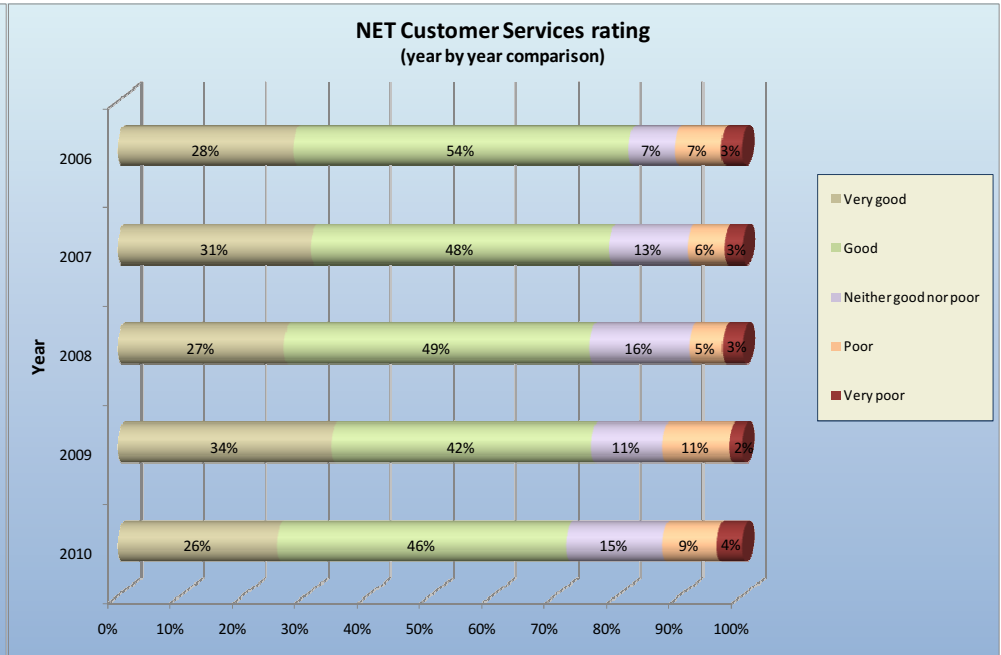
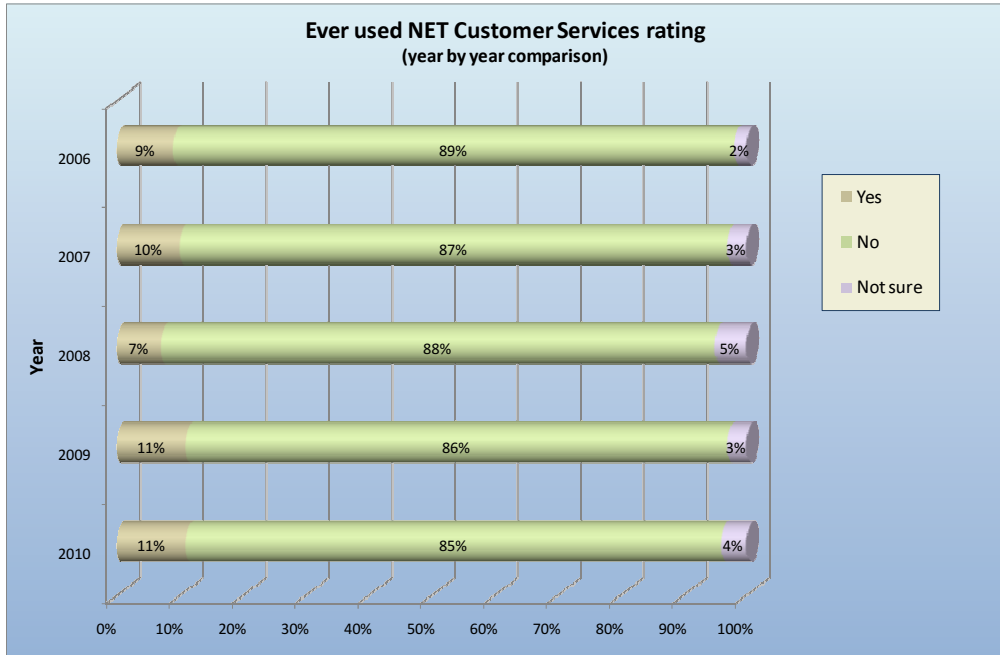
<b>Safety/security enhancements: What?</b>	
More on-tram security/at night	17
Better lighting / in surrounding areas	8
On Site Security	5
More conductors/at night	3
Restrict passenger numbers / less crowded	3
More car park security / Park&Ride security	2
Access bridge at Basford/lighting	2
More handrails / railbars on tram	2
Guards at tram stop	2

<b>New bus routes to link the tram: Where?</b>	
Hucknall / around Hucknall/Vaughan estate	9
Hucknall High Street to Annesley Road	6
Clifton	4
Nuthall	3
Eastwood	3
Kimberley	3
West Bridgford / Edwalton	3
Closer to Phoenix Park	2
Kirkby In Ashfield	2
Mansfield to Hucknall	2
QMC	2
Beeston	2
Derbyshire	2
Ilkeston	2
Just extend	2

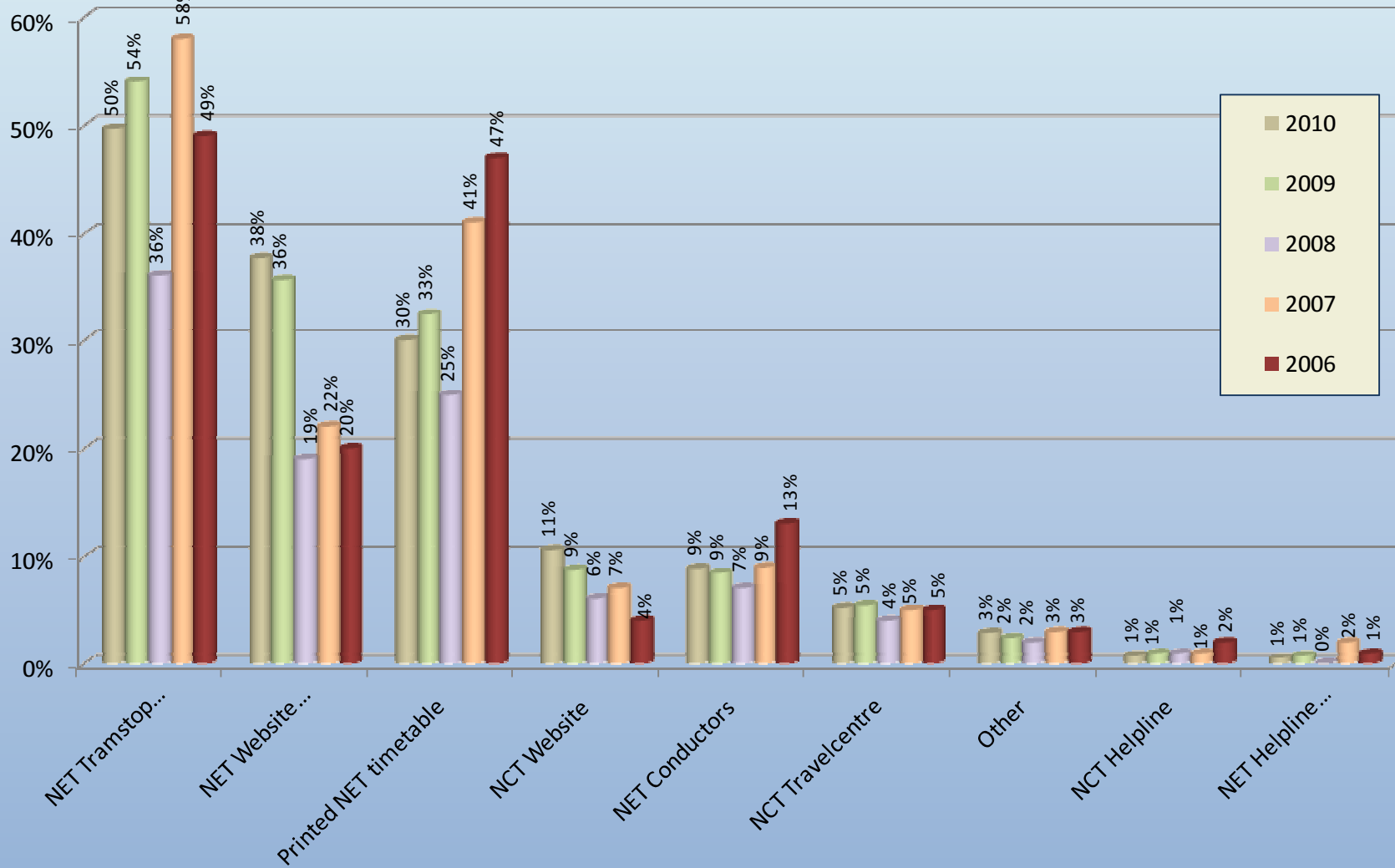
Other	
More tram routes	18
Cheaper/cheaper morning tickets	15
More/quicker info on delays/contingencies	8
If able to sit down / more seating/wider seats	5
Trams running 24 hours	4
Fewer stops/express service	4
Restrict passenger numbers / less crowded	4
More Park & Ride facilities	3
Closer to where I live	3
More frequent peak time services	3
Friendlier staff/more helpful	3
Student concessions	3

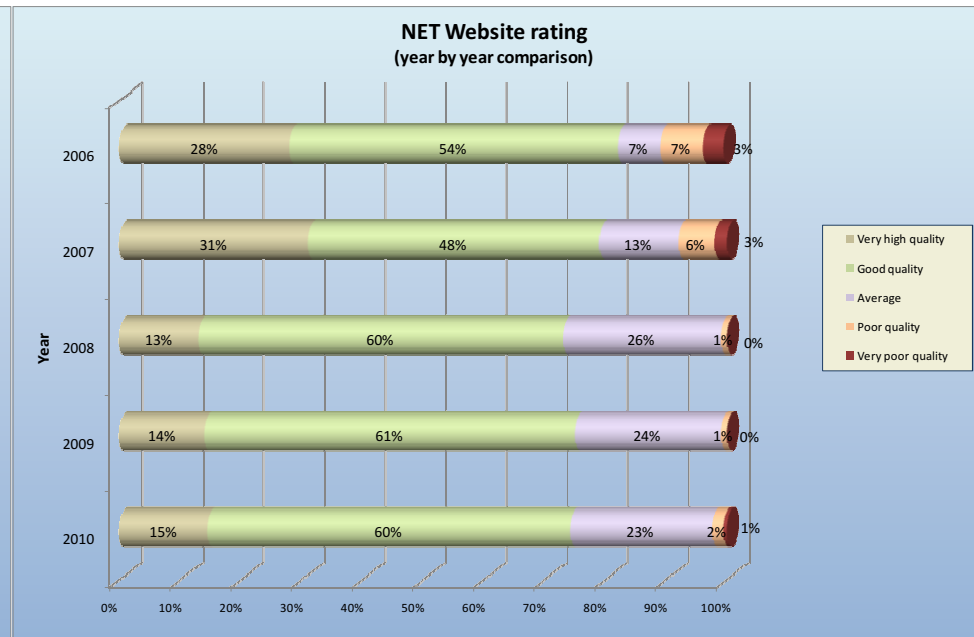
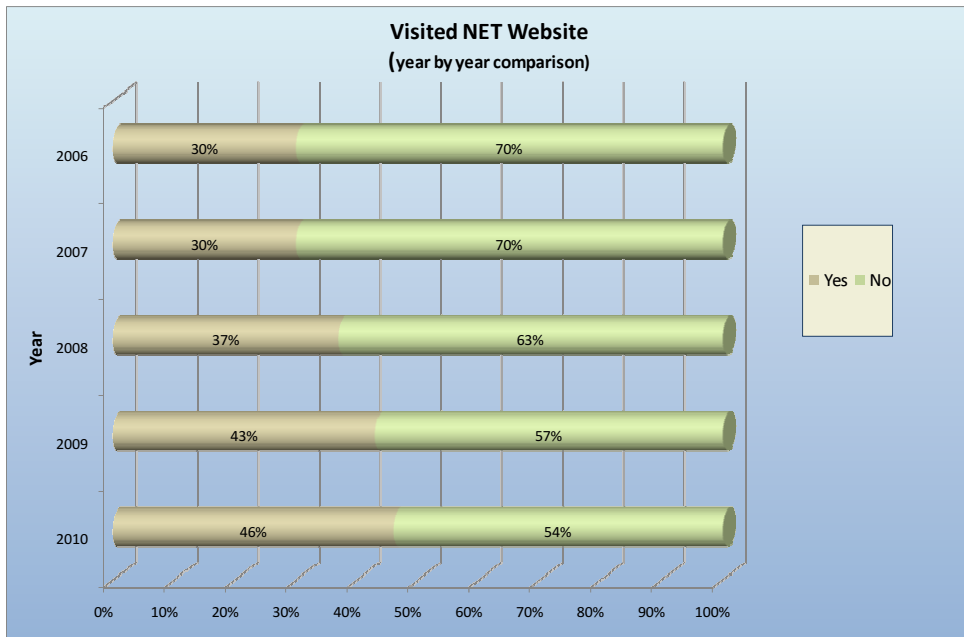
Better Marketing: How?	
More info about ticket / pass types	4
More precise information of times and journey times	3

A new type of ticket: What?	
If cheaper	30
Student concessions	23
More with buses	15
Short journey fares / zoned	15
Cheaper singles	9
Monthly tickets	8
Self check ticket	5
5 Day/weekly/commuter tickets	4
Top-up system	4
Child tickets: all day / with adult	4
3-monthly tickets	4
Yearly tickets	4
Weekly/bus:tram/weekly kangaroo	3
Monthly tram and Connect ticket	3
Ticket machine at tram stop	2
More tram routes	2
Cheaper family tickets/groups	2
Weekend tickets	2
Easier to buy on-line	2

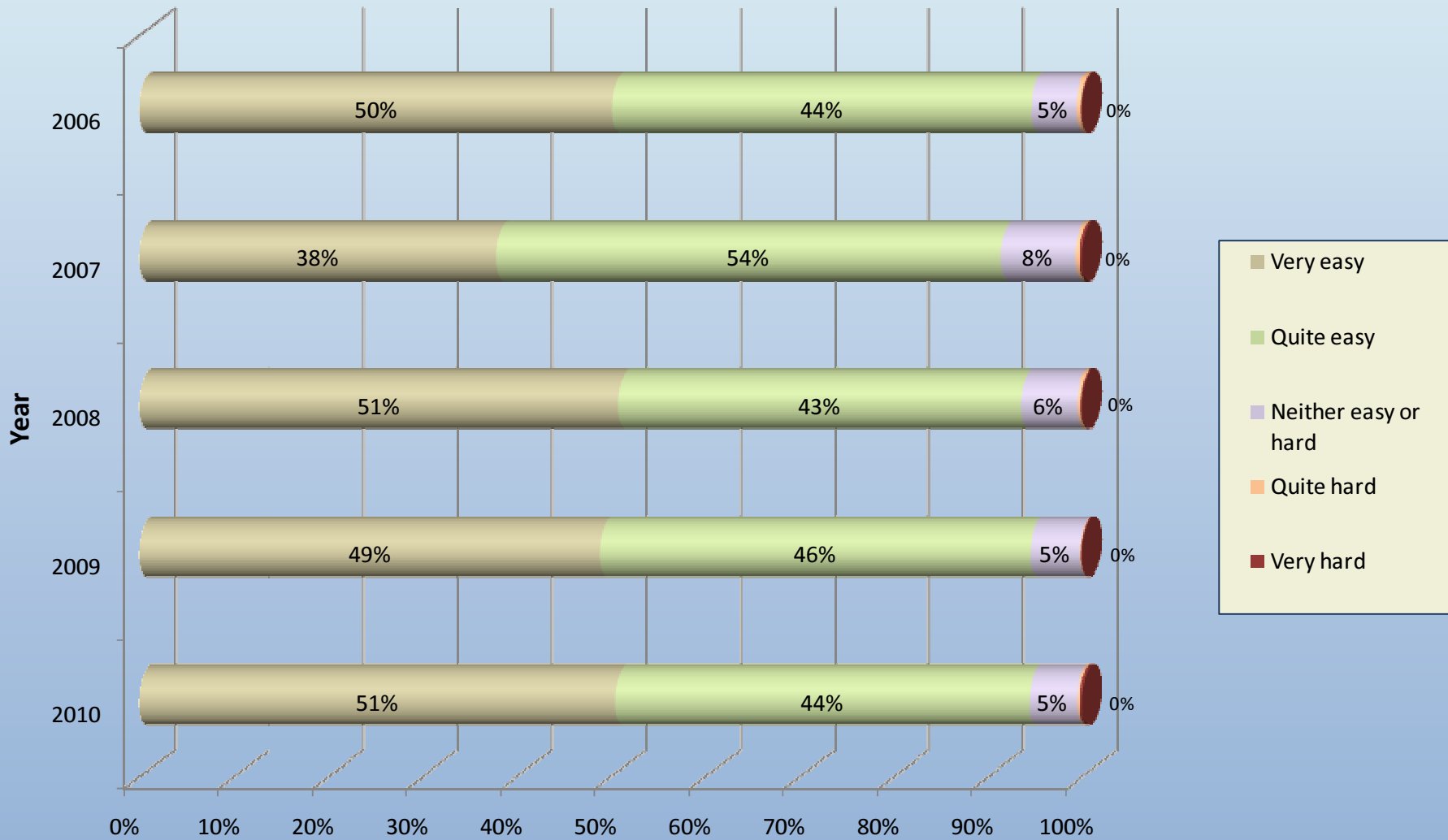


## How do you normally get information about the NET service? (year by year comparison)

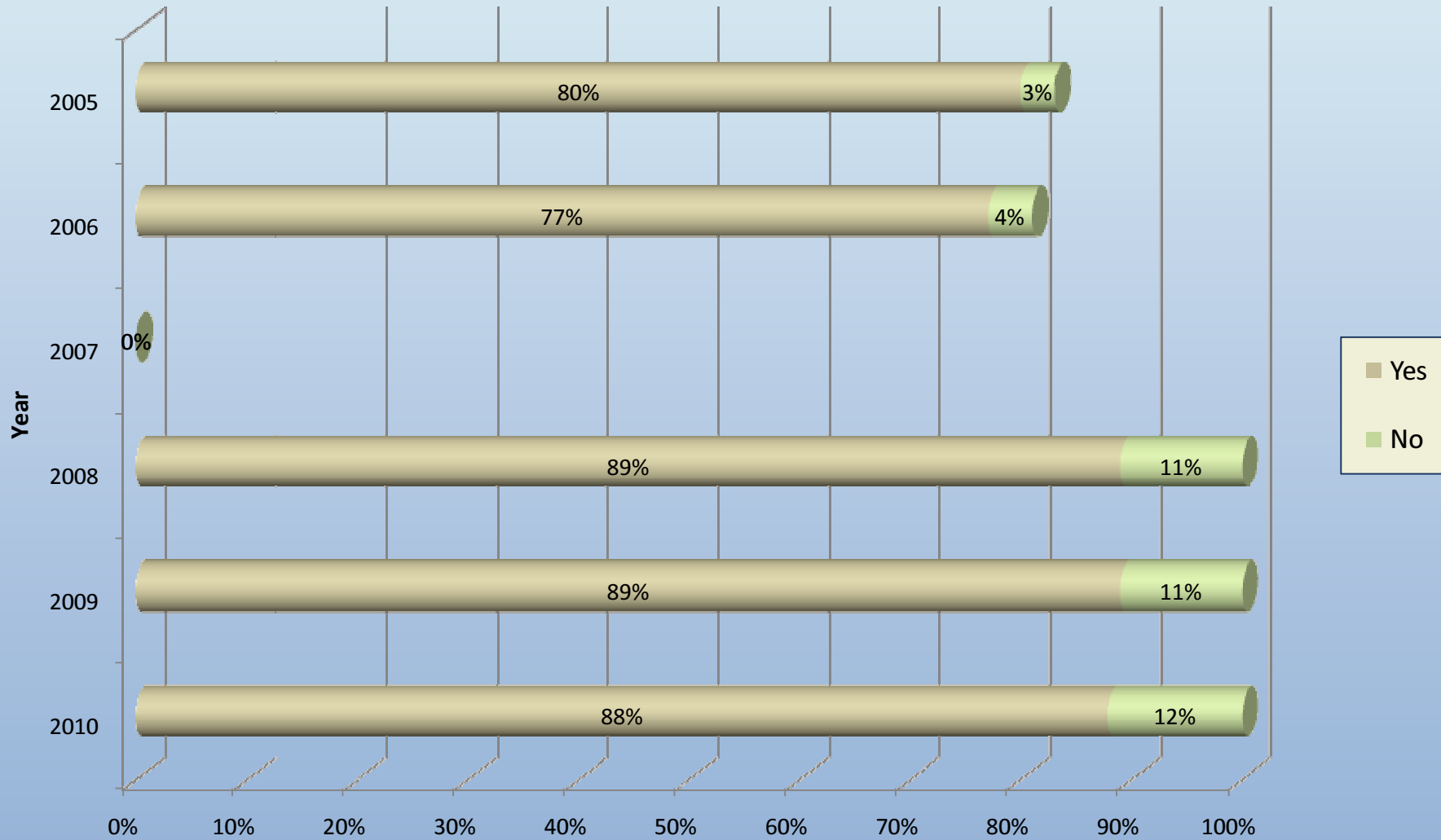




## Ease of understanding NET Service

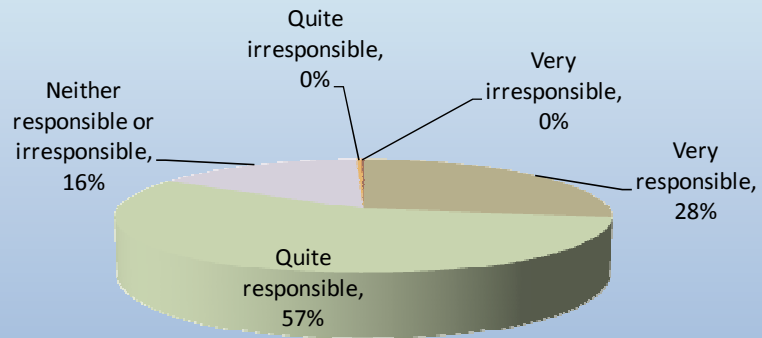


## Would you like to see the tram extended to further routes? (year by year comparison (not asked in 2007))

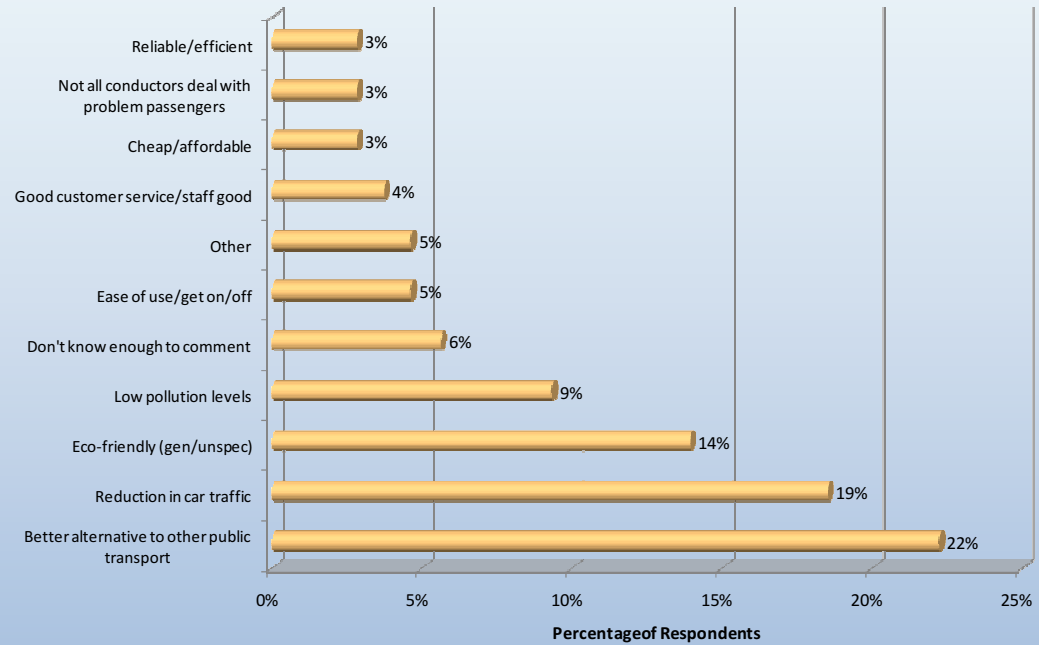




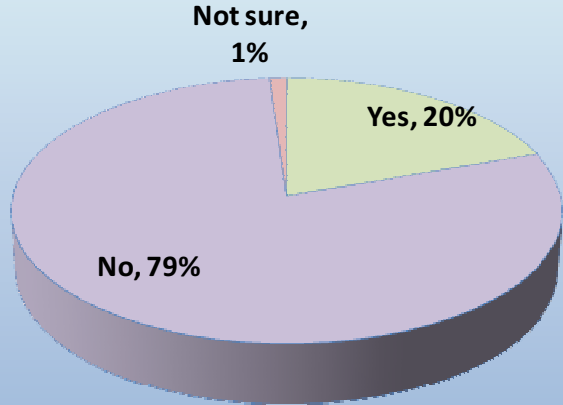
### How socially responsible do you consider NET to be?



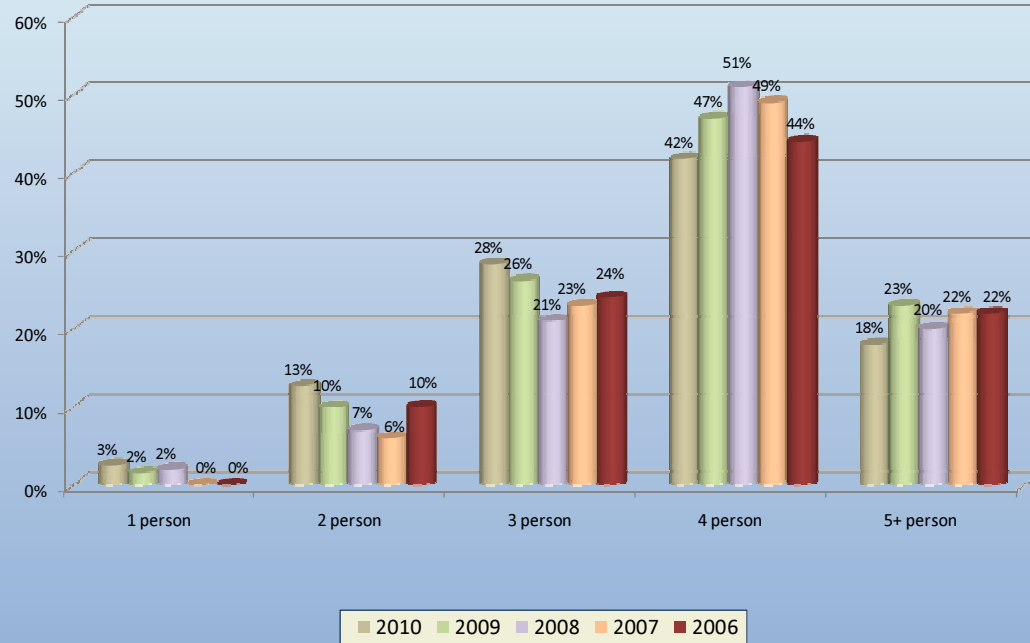
### Social Responsibility: Comments



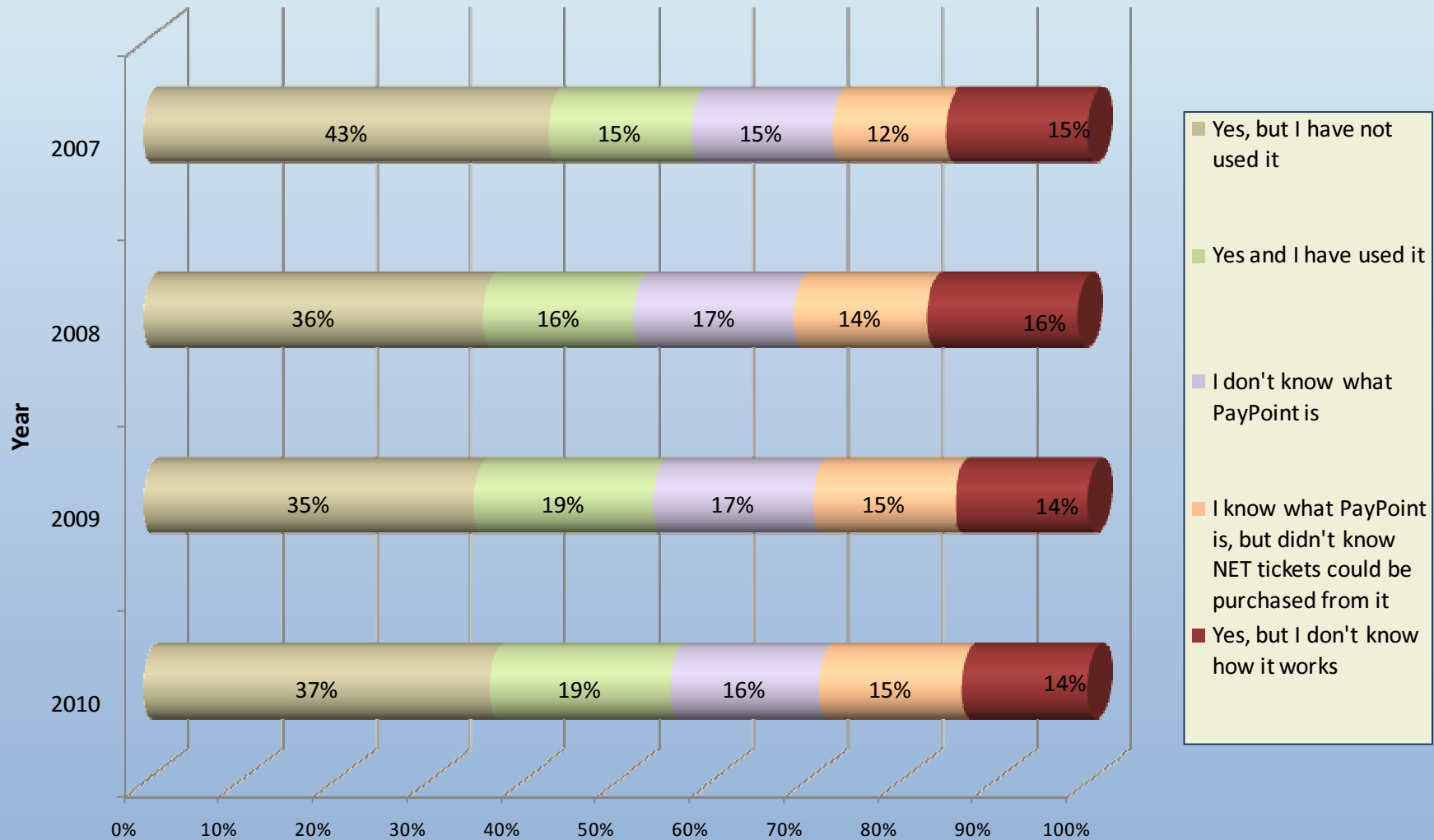
### Do you ever travel using a group ticket?



### How many people including yourself usually travel on the same group ticket? (year by year comparison)



## Aware that NET tickets can now be purchased through PayPoint

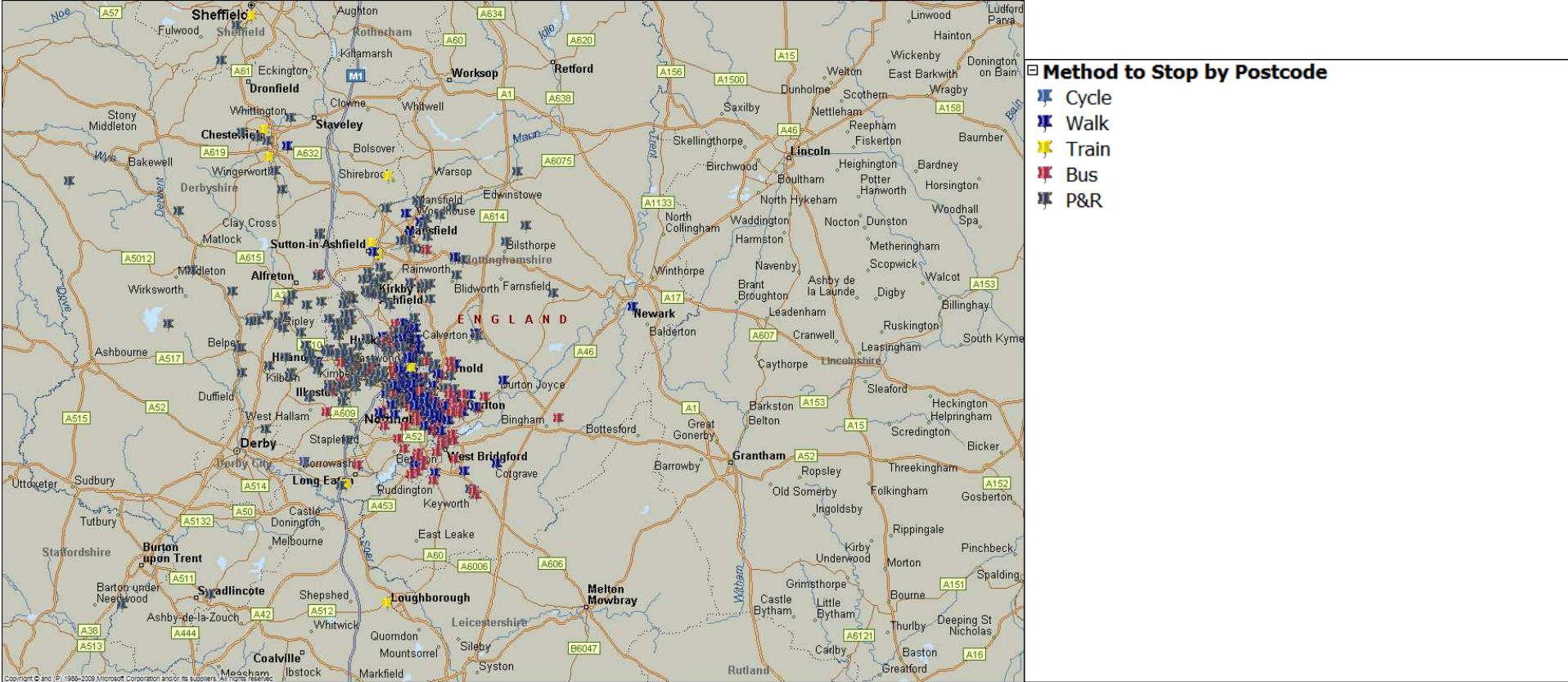


Household Group	2010	2009	2008	2007	2006	2005
Ties of Community	28%	26%	29%	29%	31%	32%
Happy Families	11%	13%	11%	13%	13%	13%
Unclassified	16%	12%	12%	1%	1%	2%
Municipal Dependency	12%	10%	10%	12%	13%	14%
Suburban Comfort	11%	9%	13%	14%	12%	11%
Urban Intelligence	6%	5%	6%	7%	7%	6%
Welfare Borderline	4%	5%	4%	9%	8%	8%
Blue Collar Enterprise	6%	5%	6%	6%	8%	6%
Symbols of Success	2%	4%	3%	2%	3%	4%
Grey Perspectives	2%	2%	3%	3%	3%	2%
Twilight Subsistence	2%	2%	2%	4%	2%	2%
Rural Isolation	1%	0%	0%	1%	1%	1%

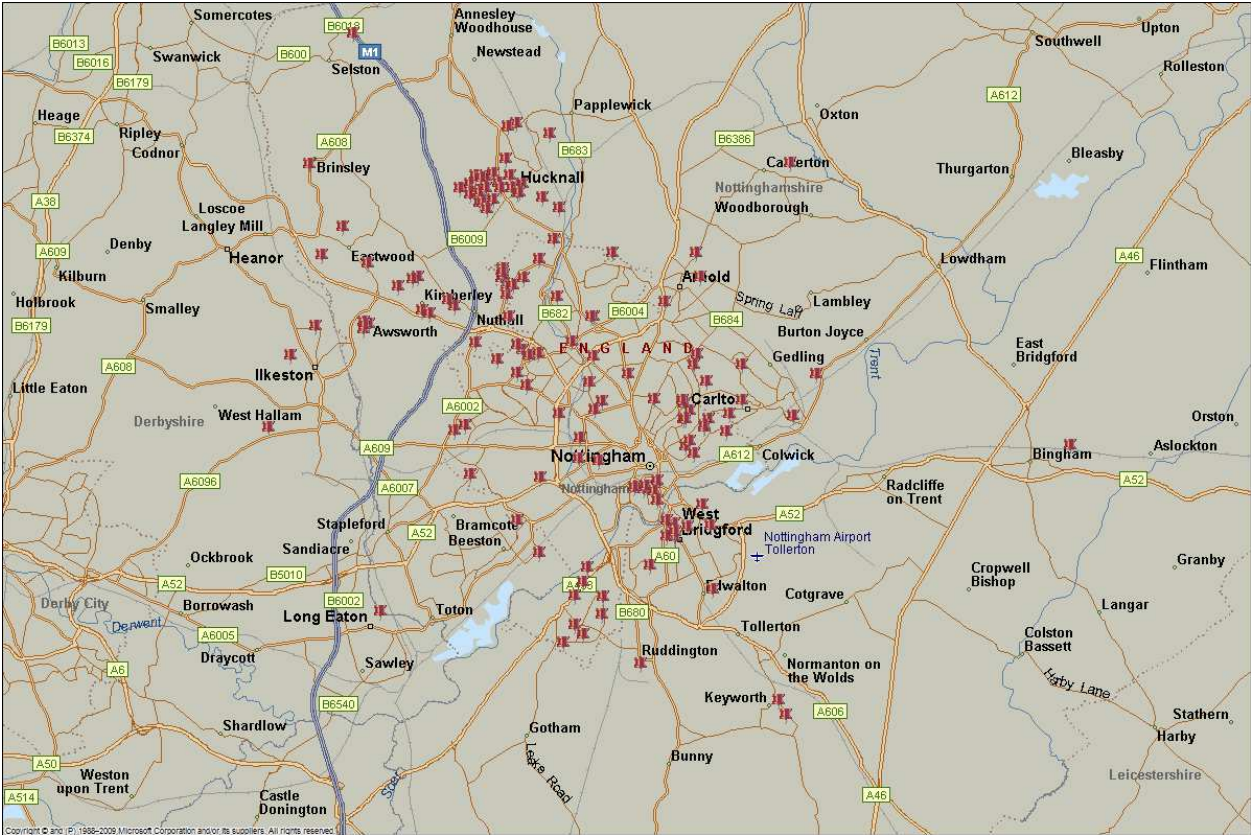
OsirisMR

NET On Tram Customer Satisfaction Research 2010

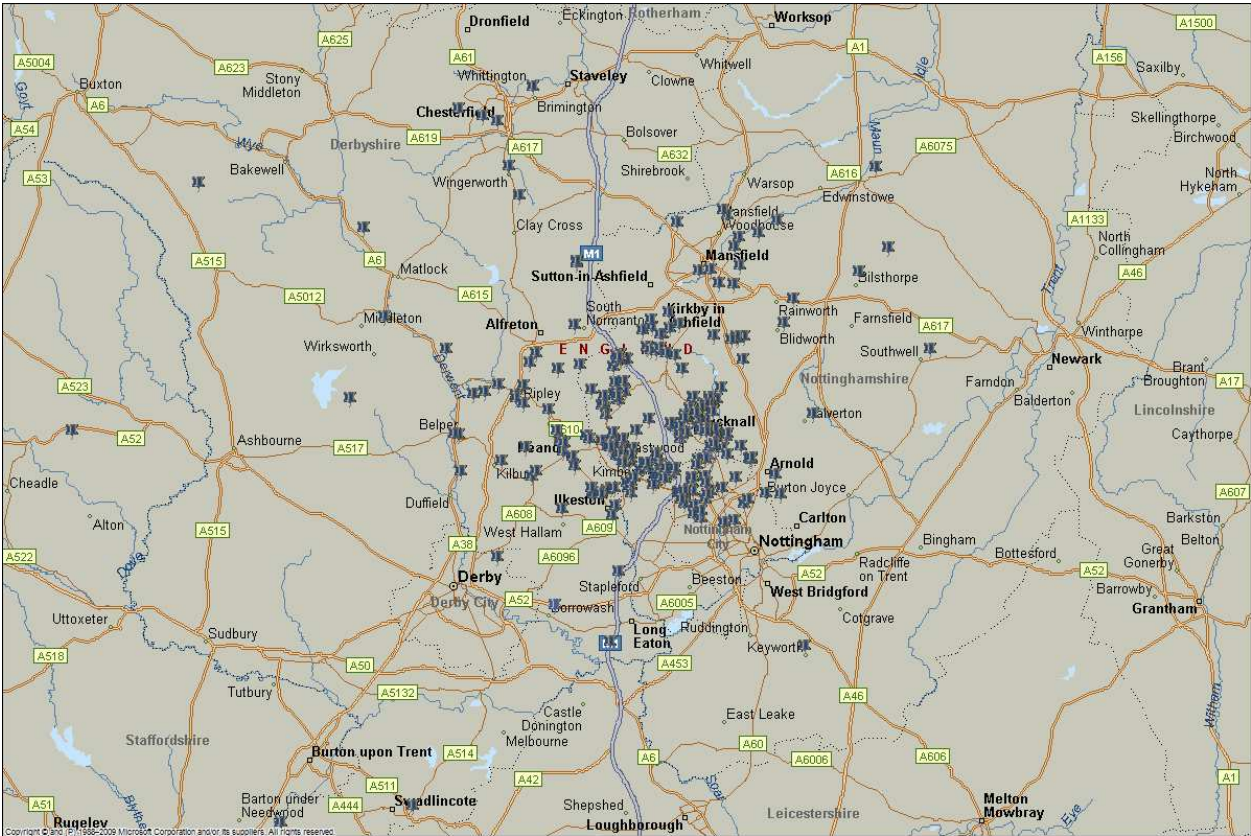
Travel Method to stop by postcode



Travel Method to Stop by Postcode – BUS



Travel Method to Stop by Postcode – Park & Ride



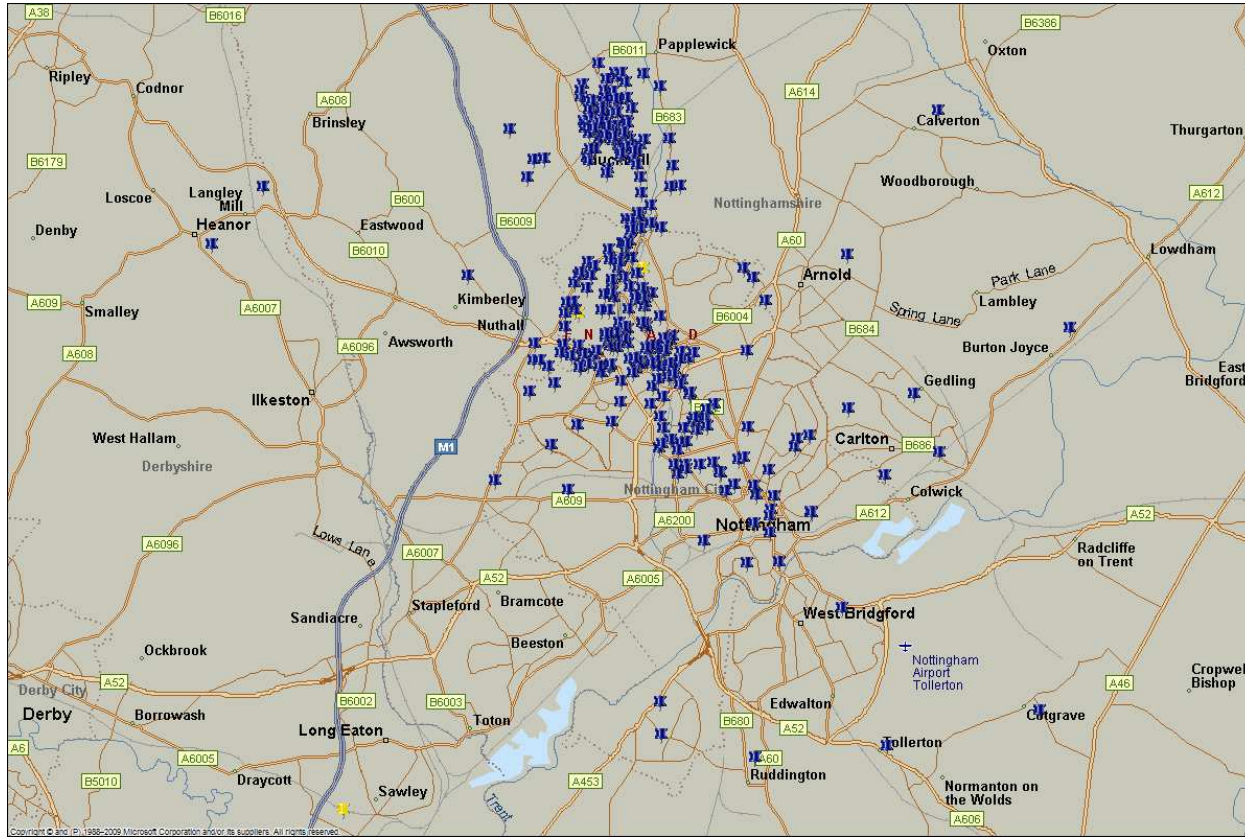
Travel Method to Stop by Postcode – Train



OsirisMR  
NET On Tram Customer Satisfaction Research 2010



## Travel Method to Stop by Postcode – Walk



OsirisMR  
NET On Tram Customer Satisfaction Research 2010