

**SUMMARY OF NET CUSTOMER SATISFACTION AND NON-USER AWARENESS
SURVEYS SUMMER 2017**

1. SUMMARY OF ISSUES

- 1.1. The report summarises the findings of the NET Customer Satisfaction and Non-User Awareness Surveys that were undertaken in May and June 2017.

2. RECOMMENDATION

- 2.1. It is RECOMMENDED that the Committee notes this report.

3. INTRODUCTION

- 3.1. Amongst other responsibilities detailed in the concession agreement, Tramlink Nottingham is responsible for the marketing of the NET tram network and conducts annual Customer Satisfaction and Non-User Awareness Surveys, the aim of which is to gain an understanding of how the NET service is perceived by the public and to take steps to improve the customer experience based on this feedback.

4. CUSTOMER SATISFACTION SURVEY

- 4.1. The survey was conducted between 12th May and 16th June 2017, a year and nine months after the opening of Phase Two. A total of 1,530 customers completed the survey.
- 4.2. Results have been very positive. Overall satisfaction of the service came out at 94%, with 98% of customers saying they would recommend travelling on NET to a friend or family member.
- 4.3. There are continued levels of high satisfaction with tram stops, the tram journey and tram tickets.
- 4.4. The results suggest an increase in frequent travel, especially with students, which has been particularly evident since the addition of the University of Nottingham stop in 2015.
- 4.5. Some comments have been received relating to the trams being too full and requests for better seating, which can be expected as patronage continues to grow. Other comments regarding a quicker ticket buying process and greater number of ticket machines can also likely be attributed to the increased volumes of people at each stop.

4.6. Below are the headline results from the survey:

- Satisfaction with overall service received is 94%
- 98% of respondents would recommend the NET service to a friend or family member
- 98% of respondents were happy with the frequency of service
- 93% of respondents were happy with the ease of getting on and off the tram
- 94% of respondents were happy with the reliability of the trams
- 84% of respondents rated NET Customer Service good or very good, an 5% increase on last year
- 98% of respondents find the NET website useful or very useful, compared to 85% in 2016
- 96% of respondents find NETs social media useful or very useful
- 85% of respondents find it easy to purchase a tram ticket
- 88% of respondents find the overall NET service easy to understand

4.7. The principal likes and dislikes of the tram were:

- Ease and convenience of service remains the primary reason for people to travel by tram (42%) followed by speed (22%) and avoiding traffic (13%)
- 23% of respondents would welcome further extensions
- 19.9% of respondents felt that trams were too busy, 14% requested better/quicker ticket machines and 10% would like to see more ticket machines.
- Areas for improvement included more seating both at tram stops (19.6%) and on-board trams (12.6%).

Issues to address from Customer Satisfaction Survey

- 4.8. In relation to feedback on seating, although there are no plans to review this, the frequency of trams means there is always one on the way and a short wait time for customers at tram stops. Similarly, if there isn't seating available on one tram, a customer has the option to wait for another. However due to the nature of any tram system, a customer cannot always be guaranteed a seat (except for those who require priority seating and wheelchair space).
- 4.9. There have been significant developments around smart ticketing which in time will address issues around ticket machines as more options become available than simply paying by cash at the platform.
- 4.10. In August 2017, all of NETs season ticket products moved over to a new smart ticketing system. Any customer renewing or purchasing a season ticket will now be on this system, offering an easy to use "touch on and go" service.
- 4.11. Integrated transport is a key priority and NET is part of the Robin Hood Network, a partnership offering easy, accessible, smart travel across a network of bus, tram and train operators. Working with other public transport operators in the City, both at an operational and marketing level, there is a commitment to offer integrated transport options to tram customers including pay as you go and season ticket options.

5. NON-USER AWARENESS SURVEY

- 5.1. The Non-User Awareness Survey sampled 1,296 people across a 12 day period between 16th and 30th June 2017 and was spread across key commuter and travel points close to the network as well as nearby suburbs Stapleford and Long Eaton.

5.2. The key findings of the survey were as follows:

- The main reasons for not using the tram included preferring to use other modes of transport (34.2%), no tram stops near to home (28.4%) and preferring to drive (27.4%)
- 59% of respondents said that they would use the tram if required
- Non-users chose not to use park and ride sites due to it either being too far from home (20%), just don't want to (12.7%) or prefer to drive (12.7%)
- When asked what could be done to persuade non-users to use the tram, 20.1% said there was nothing we could do to persuade them to use the tram, 14.8% suggested new lines may encourage them whilst 14.1% suggested more stops
- 40% of respondents were aware of the frequency of the trams
- 90% of the respondents find the service easy to understand
- Suggested new routes included Long Eaton, Mansfield and Derby.

Issues to Address from Non-User Awareness Survey

5.3. As in previous years, those that don't to use the tram, don't live or work near to a tram stop, have a bus stop close by or prefer to use their car. If there were additional lines and stops added closer to where people lived or worked, this would encourage them to use it.

5.4. Marketing initiatives to address this will include:

- A targeted marketing campaign promoting the positive messages about Park and Ride sites to both educate and change perception for potential new customers, focused particularly in areas on non-use
- Promotion of introductory offers such as a discounted monthly season tickets for new customers.
- Working with major employers in the area to promote the positive benefits of tram travel.

5.5. Awareness of ticket types scored low for non-users. Promotion of specific ticket types will continue to be part of the overall marketing campaign.

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