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OsirisMR

**NET Customer Satisfaction Survey: Executive Summary
November 2012**

Background & Methodology

For the eighth year, a comprehensive survey was carried out amongst NET tram travellers, this year during October/November 2012, 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 29th October and Sunday 4th November. 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 1443 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, 2009 and 2010 results.

Gender	1229
Female	67%
Male	33%

Age Group	1240
Under 18 years	4%
18-24 years	20%
25-34 years	19%
35-44 years	15%
45-54 years	16%
55-64 years	13%
65+ years	12%

Working Status	1213
Working full time (30+ hrs)	45%
Working part time (<30 hrs)	16%
Full- or part-time student	14%
Unemployed	6%
Retired	16%
Keeping house	2%
Other	1%

No of cars	831
None	56%
One	23%
Two	17%
Three +	4%

Children Under 16	1116
No	75%
Yes	25%

Ever travel with a pram	320
No	77%
Yes	23%

Disability	1210
Disability	11%
No disability	89%

Mobility Difficulties	1206
No difficulties	90%
Some difficulties	10%
Major difficulties	<1%

Ethnicity	1200
White British/Irish etc	91%
Black or Black British - Caribbean	2%
Black or Black British - African	<1%
Black or Black British – other	1%
Mixed White and Black – Caribbean	<1%
Mixed White and Black – African	0%
Mixed White and Asian	<1%
Mixed White and Black – other	0%
Asian or Asian-British – Indian	<1%
Asian or Asian-British – Pakistani	<1%
Asian or Asian-British – Bangladeshi	<1%
Asian or Asian-British – other	<1%
Chinese	<1%
Other	2%

How well has the tram catered for your needs	436
Very well	46%
Quite well	39%
Average	11%
Less than average	2%
Poorly	1%

Boarding & Exit Places	Boarding %	Exit %
Basford	0.7%	1.8%
Beaconsfield Street	0.0%	0.9%
Bulwell	2.8%	4.0%
Bulwell Forest	0.8%	0.4%
Butlers Hill	1.6%	1.0%
Cinderhill	2.9%	1.2%
City Centre	0.4%	1.6%
Concert Hall	0.2%	0.5%
David Lane	0.9%	1.6%
Fletcher Gate	0.2%	0.3%
High School	0.2%	1.7%
Highbury Vale	0.7%	0.7%
Hucknall	22.6%	5.2%
Hyson Green	0.3%	2.0%
Lace Market	5.1%	4.8%
Moor Bridge	1.8%	0.9%
Noel Street	0.2%	0.7%
Nottingham	0.0%	2.4%
Old Market Square	10.1%	14.2%
Park Lane	0.2%	0.0%
Phoenix Park	23.1%	9.8%
Radford Road	0.2%	0.6%
Royal Centre	2.1%	13.1%
Shipstone Street	0.0%	0.3%

Resident Postcode area	% respondents
NG1 – Nottingham Central	1%
NG2 – West Bridgford	2%
NG3 – Carlton	3%
NG4 – Gedling	2%
NG5 – Arnold/Sherwood	3%
NG6 – Bulwell	16%
NG7 – Radford/ Hyson Green	7%
NG8 – Bilborough	4%
NG9 – Beeston/ Stapleford	1%
NG10 – Long Eaton	0%
NG11 – Clifton	1%
NG12/13/14 – East Notts	2%
NG15 – Hucknall	24%
NG16 – Heanor	17%
NG17-NG22 – Mansfield & Ashfield	6%
DE – Derbyshire	6%
Other	5%
Total	699

Did you Park and Ride today?	1400
Yes	42%
No	58%

How many people travelled to the Park and Ride site in your car?	668
One	53%
Two	32%
Three	9%
Four	3%
Five or more	2%

Has the increase in fuel prices encouraged you to use the tram?	1033
Yes	33%
No	77%

Frequency of ...	Commuting				School / College / University				Shopping and Other Leisure Activities			
	2012	2010	2009	2008	2012	2010	2009	2008	2012	2010	2009	2008
Every day	40%	47%	40%	37%	16%	22%	30%	30%	4%	3%	5%	4%
A no of times/week	27%	36%	32%	34%	27%	31%	32%	33%	20%	29%	28%	28%
Once a week	10%	4%	9%	9%	9%	7%	5%	6%	26%	30%	29%	28%
Once a month	7%	3%	6%	6%	6%	2%	2%	3%	24%	25%	24%	25%
Less frequently	7%	4%	5%	7%	6%	5%	4%	10%	20%	11%	13%	13%
Never	10%	6%	8%	7%	36%	34%	27%	18%	6%	4%	2%	3%

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

	Count			Percentage		
	2012	2010	2009	2012	2010	2009
Yes	462	398	571	48%	52%	54%
No	499	374	494	52%	48%	46%

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

	Base			Every Day			2-4 times per week			Once a week			Once a month			Less frequently			Never		
	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009
Bus	530	478	399	22%	26%	38%	22%	26%	32%	10%	8%	9%	7%	10%	10%	10%	*	*	29%	30%	11%
Car	476	418	315	30%	22%	35%	16%	20%	27%	11%	12%	11%	7%	12%	12%	11%	*	*	27%	33%	15%
Train	313	433	174	6%	7%	13%	7%	8%	11%	7%	5%	5%	11%	13%	21%	15%	*	*	55%	67%	51%
Walking	361	516	205	37%	32%	42%	10%	17%	22%	6%	3%	4%	3%	3%	2%	4%	*	*	41%	45%	29%
Cycling	263	403	146	2%	5%	8%	6%	5%	8%	3%	2%	3%	2%	3%	6%	5%	*	*	83%	85%	75%

*Data not previously collected

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

	Base			Bus			Car			Train			Walk			Cycling			Other		
	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009
	1007	1213	1302	64%	71%	67%	45%	37%	38%	11%	11%	10%	14%	16%	18%	3%	4%	5%	2%	2%	2%

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

	Count			Percent		
	2012	2010	2009	2012	2010	2009
Yes	160	173	174	39%	31%	37%
No	248	387	298	61%	69%	63%

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

	Base			Every Day			2-4 times per week			Once a week			Once a month			Less frequently			Never		
	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009
Bus	237	366	288	23%	23%	22%	16%	19%	26%	7%	7%	8%	5%	5%	5%	6%	*	*	44%	47%	39%
Car	210	271	209	25%	12%	18%	13%	13%	16%	6%	6%	6%	2%	6%	5%	8%	*	*	45%	63%	55%
Train	154	240	178	7%	5%	6%	5%	3%	6%	5%	4%	2%	5%	4%	8%	7%	*	*	73%	84%	78%
Walking	185	286	152	28%	29%	26%	12%	10%	13%	4%	4%	3%	3%	0%	1%	3%	*	*	49%	57%	57%
Cycling	153	233	120	2%	2%	8%	3%	2%	3%	2%	1%	1%	3%	3%	0%	6%	*	*	84%	92%	88%

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

	Base			Bus			Car			Train			Walk			Cycling			Other		
	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009
	343	410	388	52%	68%	66%	40%	25%	30%	9%	7%	9%	21%	21%	18%	5%	5%	4%	3%	3%	2%

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	655	678	580	58%	55%	55%
No	468	448	469	42%	45%	45%

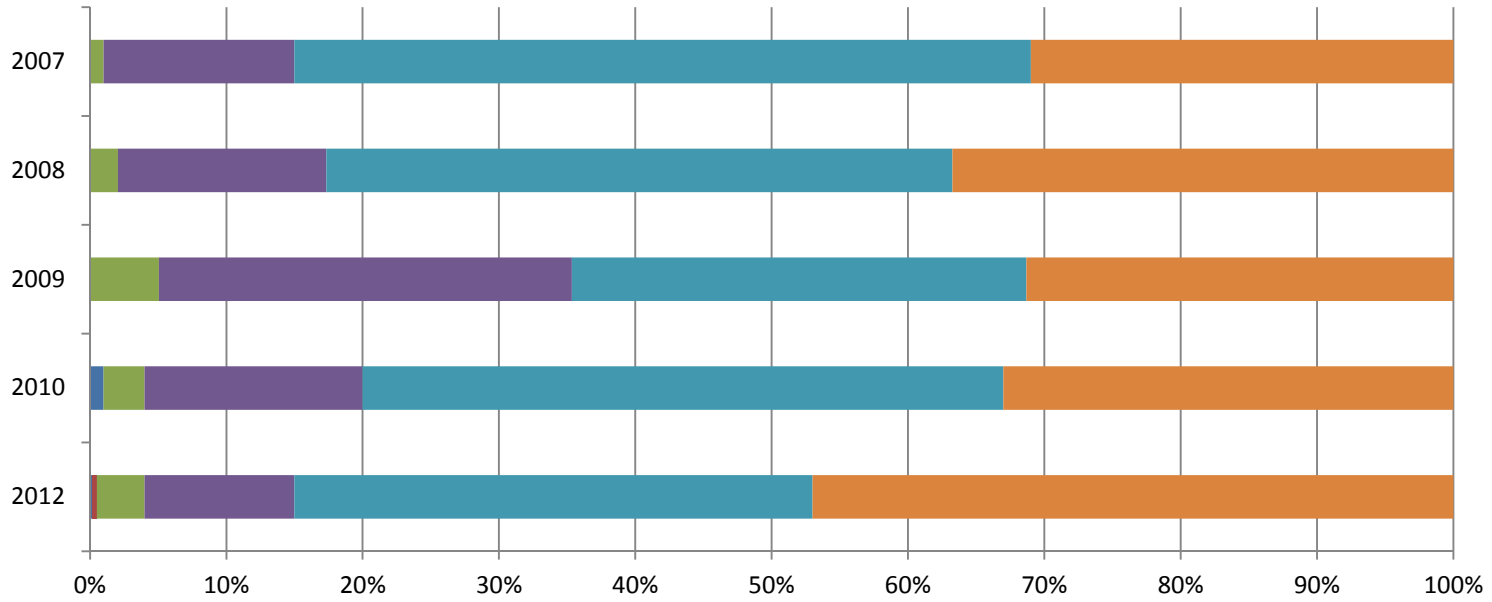
Frequency of transport use for shopping and other leisure activities along same route as the tram

	Base			Every Day			2-4 times per week			Once a week			Once a month			Less frequently			Never		
	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009
Bus	604	418	444	13%	17%	19%	18%	30%	28%	17%	20%	21%	10%	18%	16%	16%	*	*	27%	15%	16%
Car	641	397	432	19%	16%	16%	19%	27%	29%	20%	25%	22%	13%	22%	25%	13%	*	*	16%	9%	9%
Train	337	182	198	2%	4%	5%	5%	4%	5%	5%	5%	8%	7%	14%	17%	20%	*	*	62%	72%	65%
Walking	392	242	245	24%	21%	21%	14%	26%	26%	7%	7%	14%	4%	7%	5%	8%	*	*	43%	39%	35%
Cycling	301	178	177	1%	4%	2%	3%	6%	6%	2%	4%	2%	2%	5%	6%	8%	*	*	85%	80%	84%

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

	Base			Bus			Car			Train			Walk			Cycling			Other		
	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009	2012	2010	2009
	1140	1041	1075	56%	64%	60%	61%	54%	51%	10%	15%	18%	18%	8%	8%	2%	3%	3%	2%	0%	1%

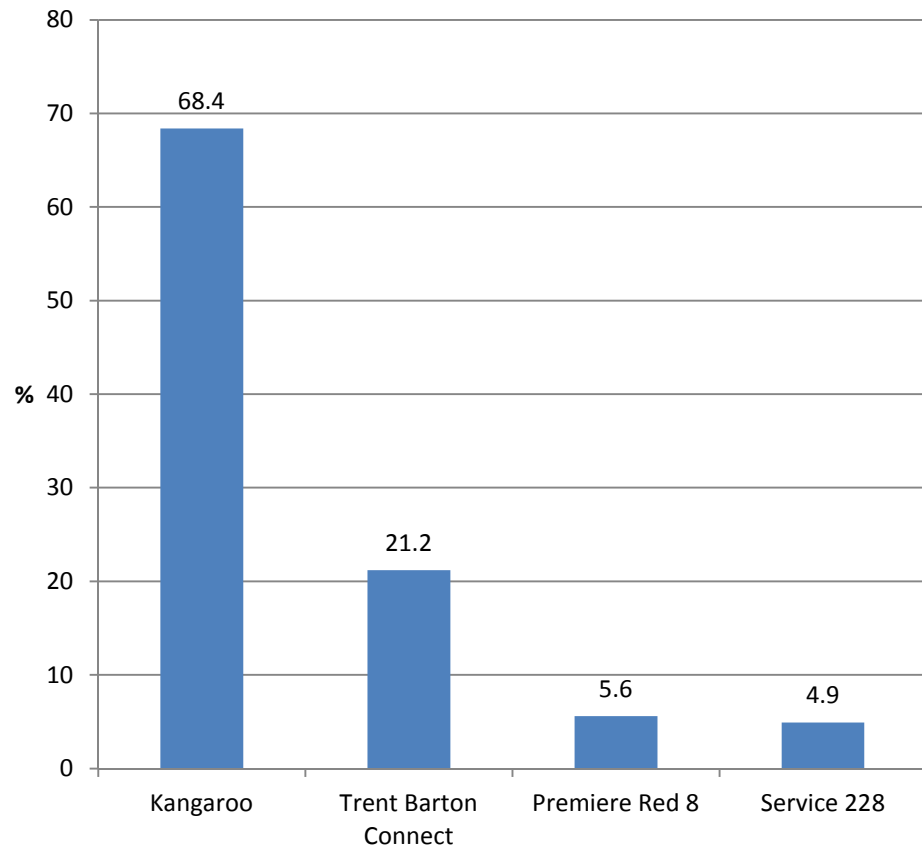
How did you get to the tram stop?



	2012	2010	2009	2008	2007
■ Cycling	0.2	1	0	0	0
■ Motorbike	0.3	0	0	0	0
■ Train	3.5	3	5	2	1
■ Bus	11	16	30	15	14
■ Walking	38	47	33	45	54
■ Car	47	33	31	36	31

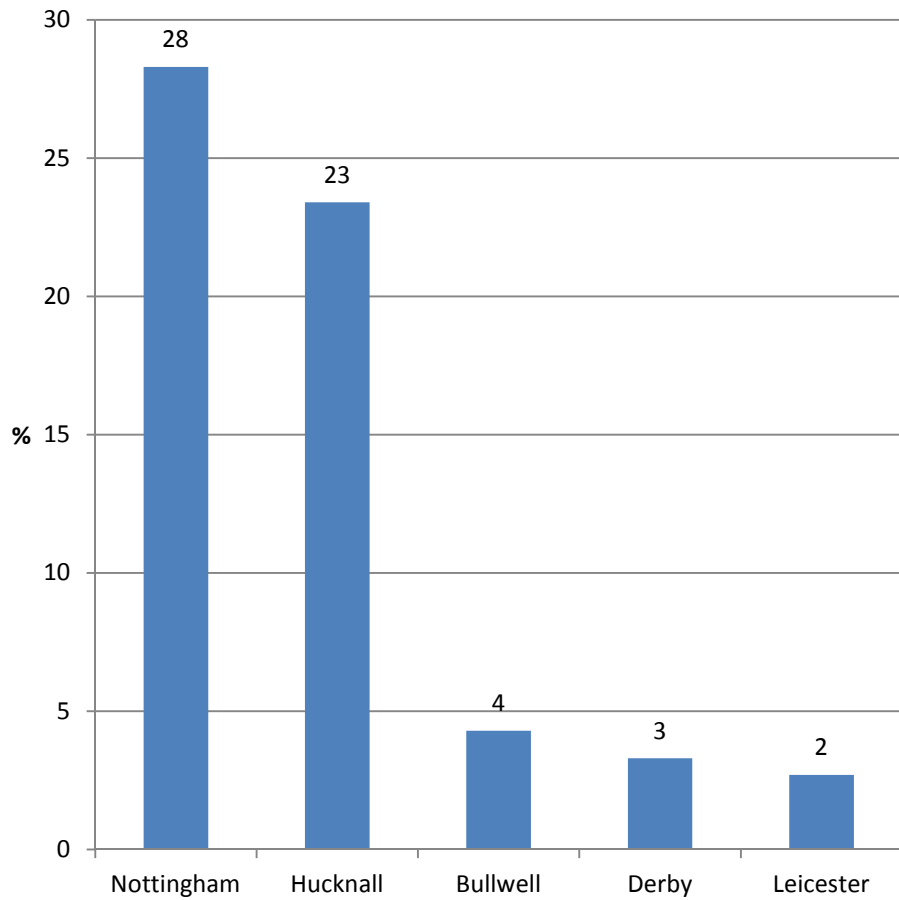
%

Comined Ticket Useage



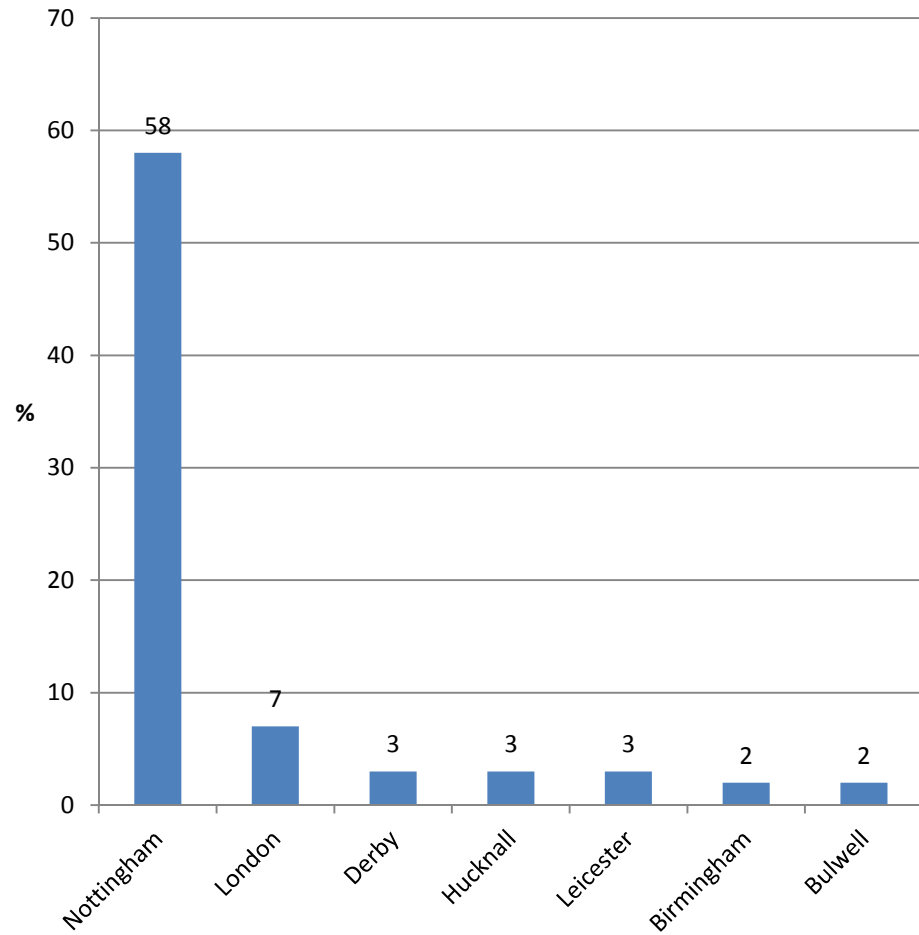
Base: 288 responses

Railway Station started when using train



Base:184

Railway station interchanged at



Base: 96

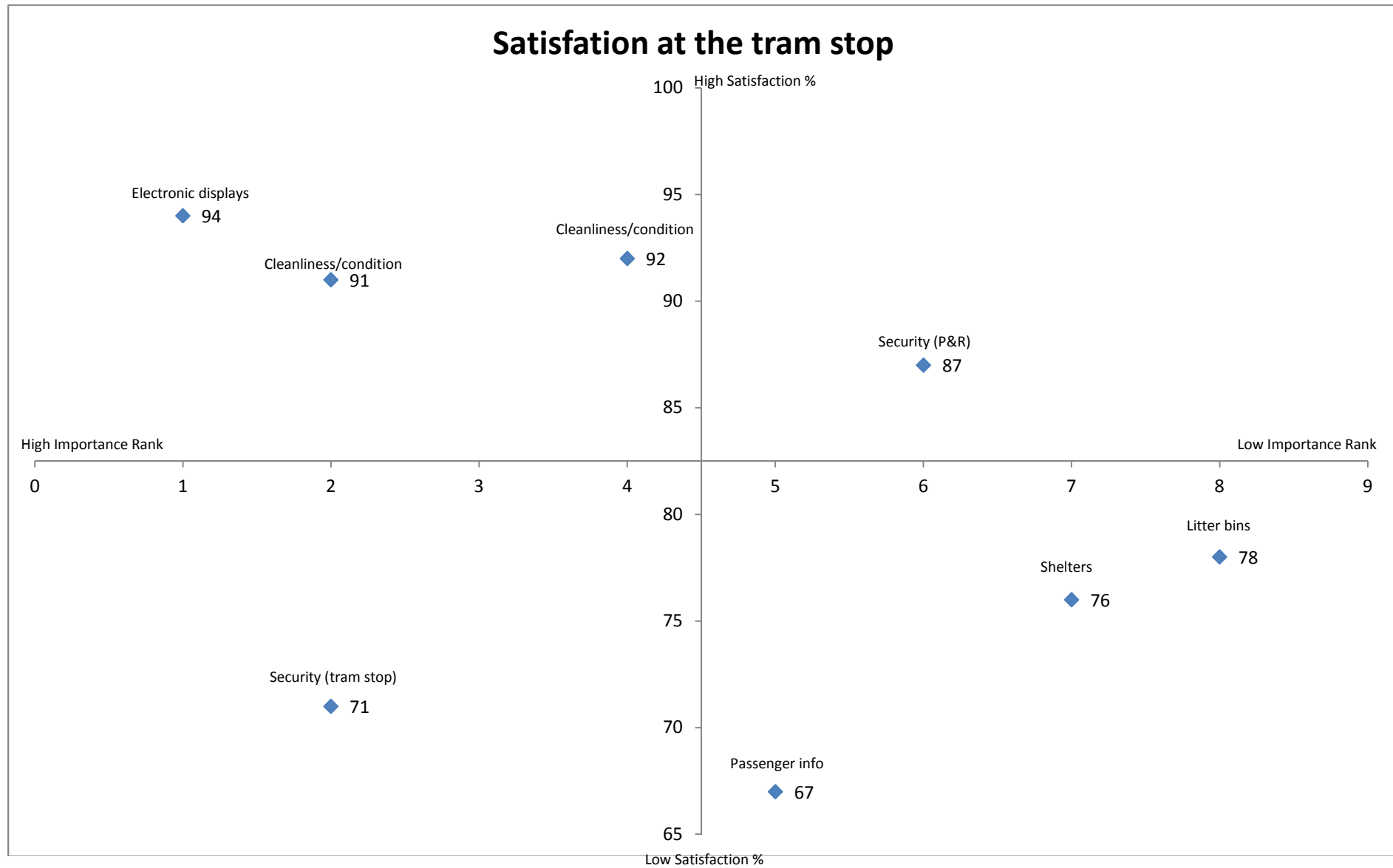
Satisfaction at tram stop

	Ranked Importance	Base				Net Satisfaction				x̄ Score	Variance	x̄ Score	Variance	x̄ Score	Variance
		2012	2010	2009	2008	2012	2010	2009	2008	2012	2012	2010	2010	2009	2009
Overall at Tram Stop		-	-	-	-	82%	77%	78%	78%	1.81	-	4.11	-	4.08	0.43
Passenger info	4	1332	1398	1321	1323	92%	89%	92%	84%	1.59	0.5	4.37	0.52	4.39	0.84
Security at P&R sites	5	1129	937	842	1024	67%	62%	57%	70%	1.85	1.3	3.84	0.81	3.75	0.55
Cleanliness/condition	2 =	1309	1404	1321	1295	91%	89%	87%	81%	1.69	0.49	4.29	0.47	4.28	0.03
Tram stop shelters	7	1180	1230	1071	1076	76%	69%	69%	77%	2.08	0.9	3.94	0.81	3.92	0.74
Electronic displays	1	1308	1395	1316	1292	94%	91%	93%	85%	1.51	0.46	4.45	0.49	4.48	0.43
Security on route to tram stop	2 =	1291	1354	1283	1273	71%	65%	63%	66%	2	0.85	3.93	0.82	3.89	0.85
Lighting	6	1179	1210	1051	1069	87%	82%	81%	78%	1.84	0.58	4.11	0.57	4.06	0.54
Litter bins	8	1174	1193	1038	1073	78%	72%	71%	76%	1.95	0.75	3.97	0.69	3.92	0.65

*The average score is based on the following scale:

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

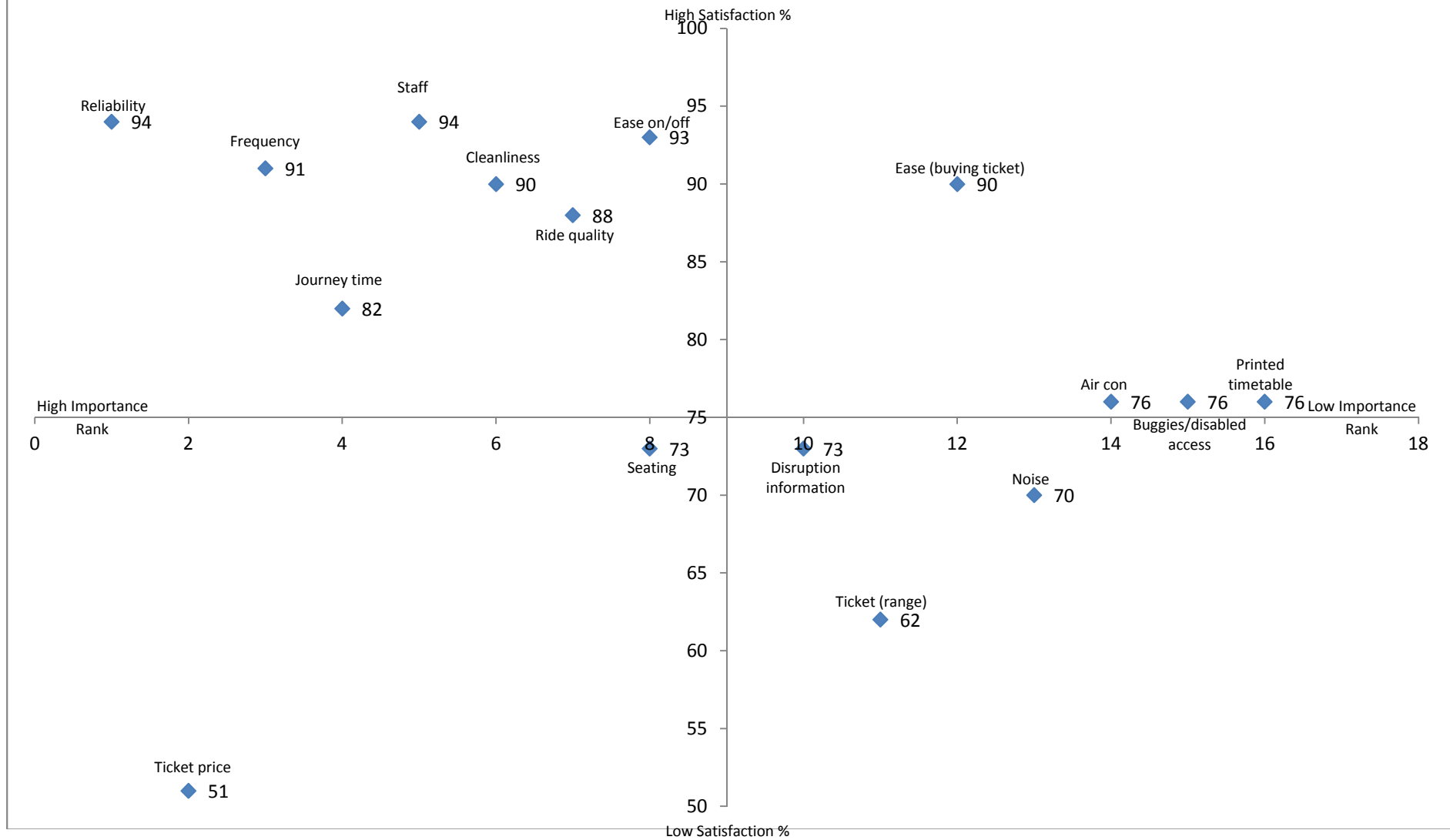
Satisfaction at the tram stop



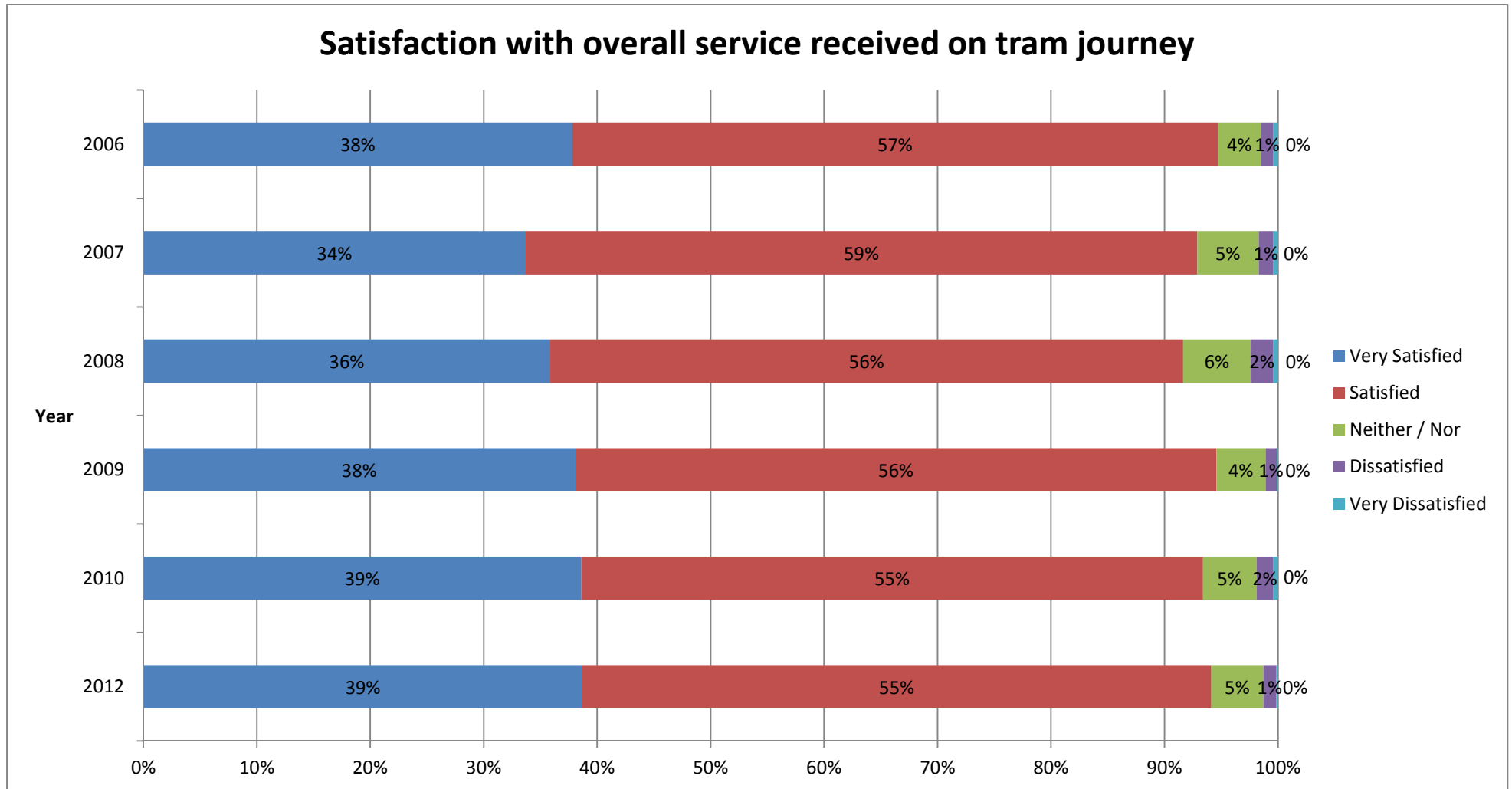
Satisfaction Overall on-board the Tram and Journey

	Ranked Importance	Base				Net Satisfaction				Ave Score	Variance	Ave Score	Variance	Ave Score	Variance
		2012	2010	2009	2008	2012	2010	2009	2008	2012	2012	2010	2010	2009	2009
Overall on-board		-	-	-	-	81%	76%	71%	77%			4.09	-	4.08	-
Price/range of tickets		-	1330	1170	1190	-	49%	57%	67%	-	-	3.69	1.15	3.79	1.02
Price of tickets	2	1247	-	-	-	51%	-	-	-	2.57	1.63	-	-	-	-
Range of tickets	11	1223	-	-	-	62%	-	-	-	2.19	1.39	-	-	-	-
Reliability	1	1093	1179	1084	1103	94%	86%	85%	81%	1.58	0.46	4.26	0.57	4.26	0.6
Ease of buying a ticket	12	1063	1112	1042	1066	90%	86%	87%	80%	1.7	0.58	4.23	0.53	4.24	0.5
Ease of getting on/off	8 =	1284	1413	1275	1276	93%	87%	88%	82%	1.56	0.48	4.33	0.56	4.35	0.52
Cleanliness inside	6	1283	1409	1216	1240	90%	87%	86%	81%	1.75	0.54	4.24	0.52	4.23	0.54
Disruptions information	10	1256	1283	1125	1164	73%	59%	66%	73%	1.88	1.19	3.86	1.11	3.94	0.89
Disruptions resolution		-	n/a	n/a	n/a	-	n/a	n/a	n/a	-	-	n/a	n/a	n/a	n/a
Journey time	4	1087	1177	1082	1094	92%	87%	85%	80%	1.69	0.48	4.25	0.5	4.24	4.24
Air conditioning	14	1074	1125	1053	1050	76%	67%	63%	72%	1.95	0.85	3.92	0.76	3.87	3.87
Seating comfort	8 =	1083	1168	1077	1088	73%	65%	68%	73%	2.12	0.85	3.87	0.82	3.91	3.91
Printed timetable leaflet	16	1069	1074	1016	1041	76%	80%	80%	77%	1.78	0.93	4.09	0.56	4.09	4.09
Staff friendly / helpful	5	1314	1414	1280	1295	94%	92%	92%	83%	1.55	0.41	4.38	0.45	4.4	4.4
Buggies/disabled provision	15	1236	1180	1051	1081	76%	70%	68%	75%	1.67	1.19	4	0.8	3.96	3.96
Quality of ride	7	1262	-	-	-	88%	-	-	-	1.79	0.49	-	-	-	-
Noise	13	1069	-	-	-	70%	-	-	-	2.19	0.81	-	-	-	-
Frequency	3	1080	-	-	-	91%	-	-	-	1.71	0.5	-	-	-	-

Satisfaction on board the tram

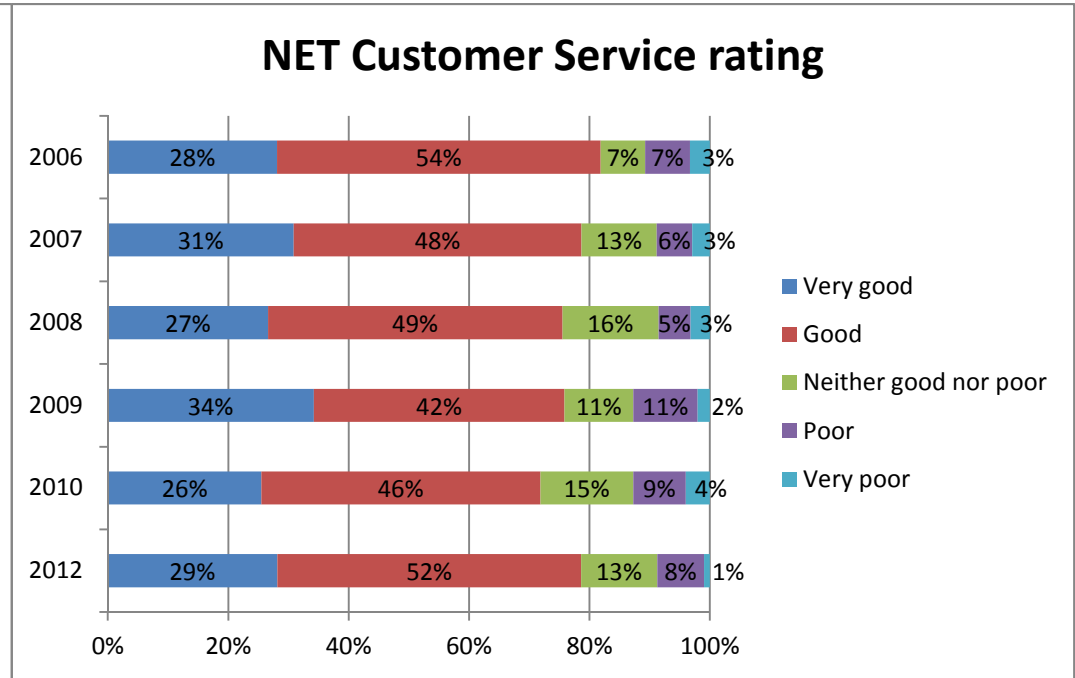
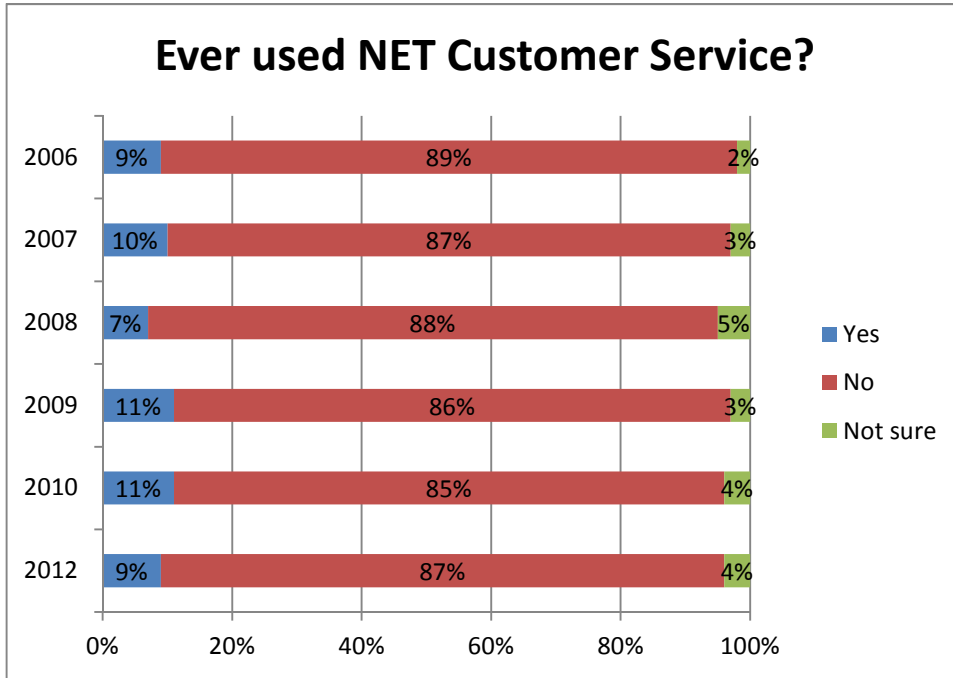


Satisfaction with overall service received on tram journey



Would you recommend the NET service to a friend or family member?

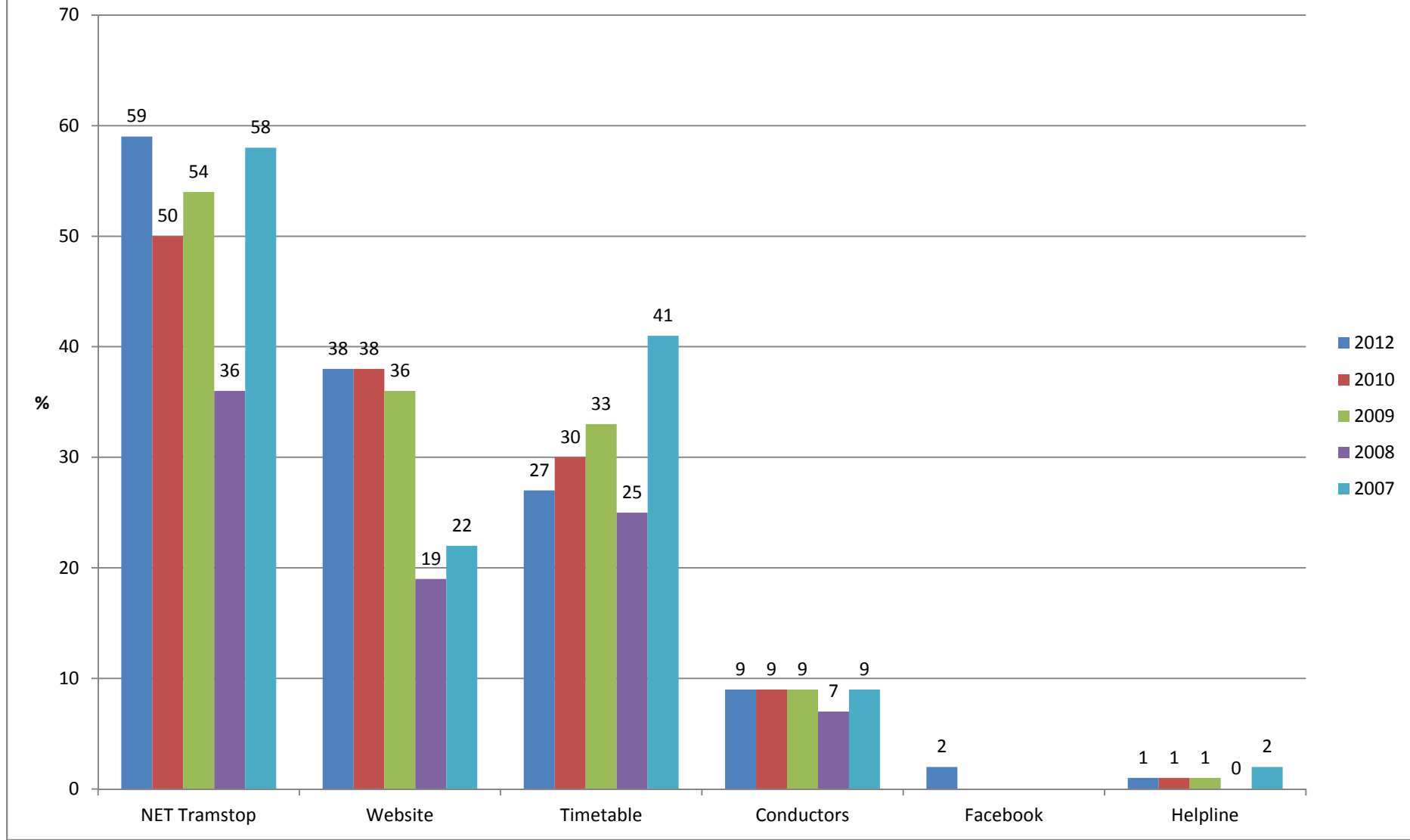
	%				
	2012	2010	2009	2008	2007
Yes	96.9	96.4	96.2	97	97.8
No	3.1	3.6	3.8	3	2.2



Base:1237

Base:374

How do you normally get information about the NET service?



How often do you visit the website?	1168
Several times per day	0%
Every day	1%
2-4 times per week	3%
Once a week	6%
Once a month	12%
Less frequently	31%
Never	47%

How do you normally connect to the website?*	830
Computer	59%
Mobile phone	27%
Tablet	7%
Do not visit the website	28%

* number of responses

How useful do you find the NET website?	631
Very useful	20%
Useful	70%
Not very useful	10%

How would you rate the NET website?	2012	2010	2009	2008	2007
Base	612	636	565	493	387
Very high quality	10%	15%	14%	13%	31%
Good quality	55%	60%	61%	60%	48%
Average	33%	23%	24%	26%	13%
Poor	1%	2%	1%	1%	6%
Very poor	1%	1%	0%	0%	3%

Taking everything into account how easy is it to understand the NET service	1013
Very easy	34%
Quite easy	52%
Neither easy nor hard	13%
Quite hard	1%
Very hard	0%

<i>Are you aware of the multi-operator KANGAROO tickets..?</i>	1026
<i>Yes and I use them</i>	9%
<i>Yes but I don't need them</i>	53%
<i>I have heard of KANGAROO but don't know what it is</i>	13%
<i>No</i>	25%

<i>Do you ever travel on a group ticket..?</i>	1173
<i>Yes</i>	15%
<i>No</i>	81%
<i>Not sure</i>	4%

Number of people in group	123
1	13%
2	10%
3	31%
4	36%
5+	10%

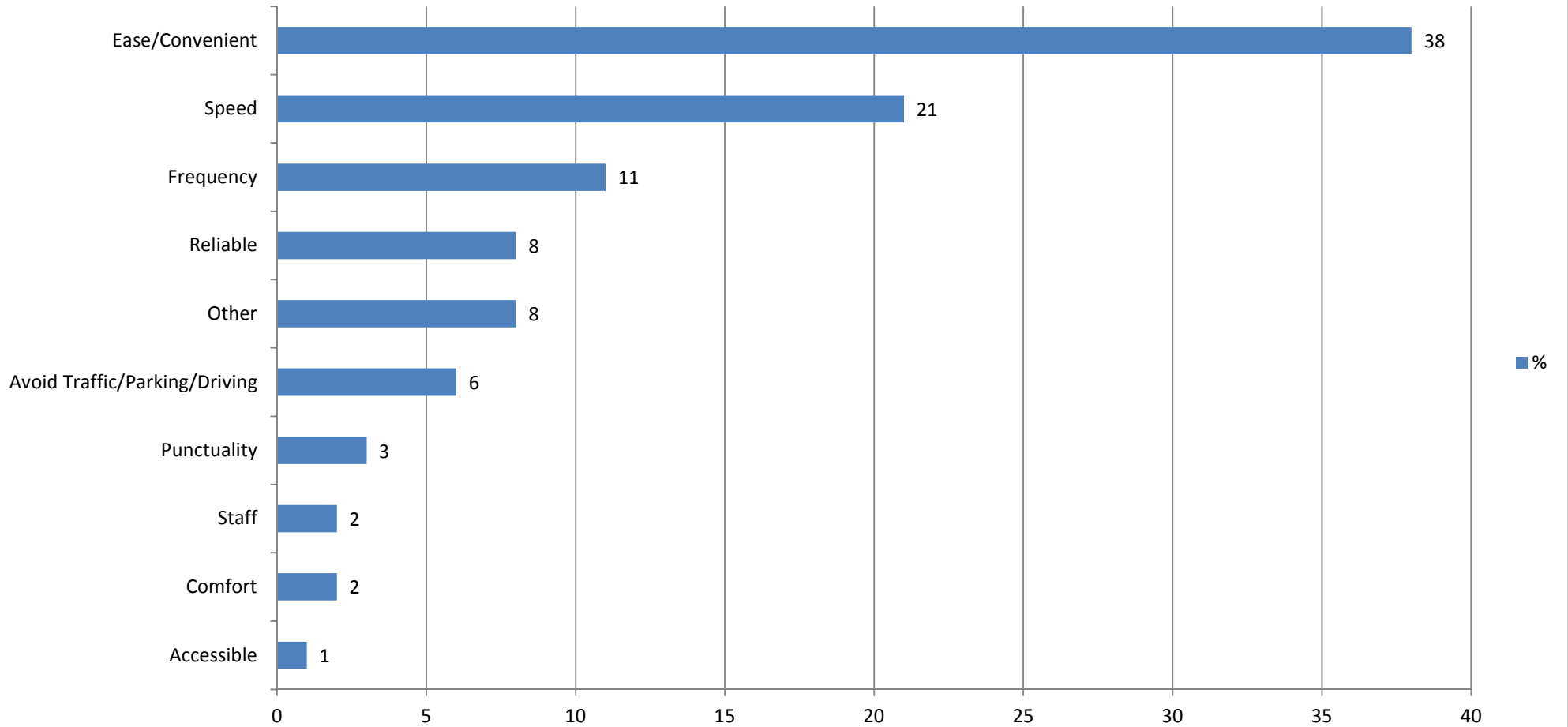
Are you aware that some tickets can be purchased through PayPoint?	
	522
Yes, but I don't know how it works	8%
Yes, but I have not used it	34%
Yes and I have used it	25%
I don't know what PayPoint is	7%
I know what PayPoint is but didn't know I could purchase NET tickets	4%
No	22%

What could have improved your journey?

Key comments:	
	1026
Price	22%
Frequency	11%
Seating (improved/more)	6%
Passes (more/able to use to Hucknall)	5%

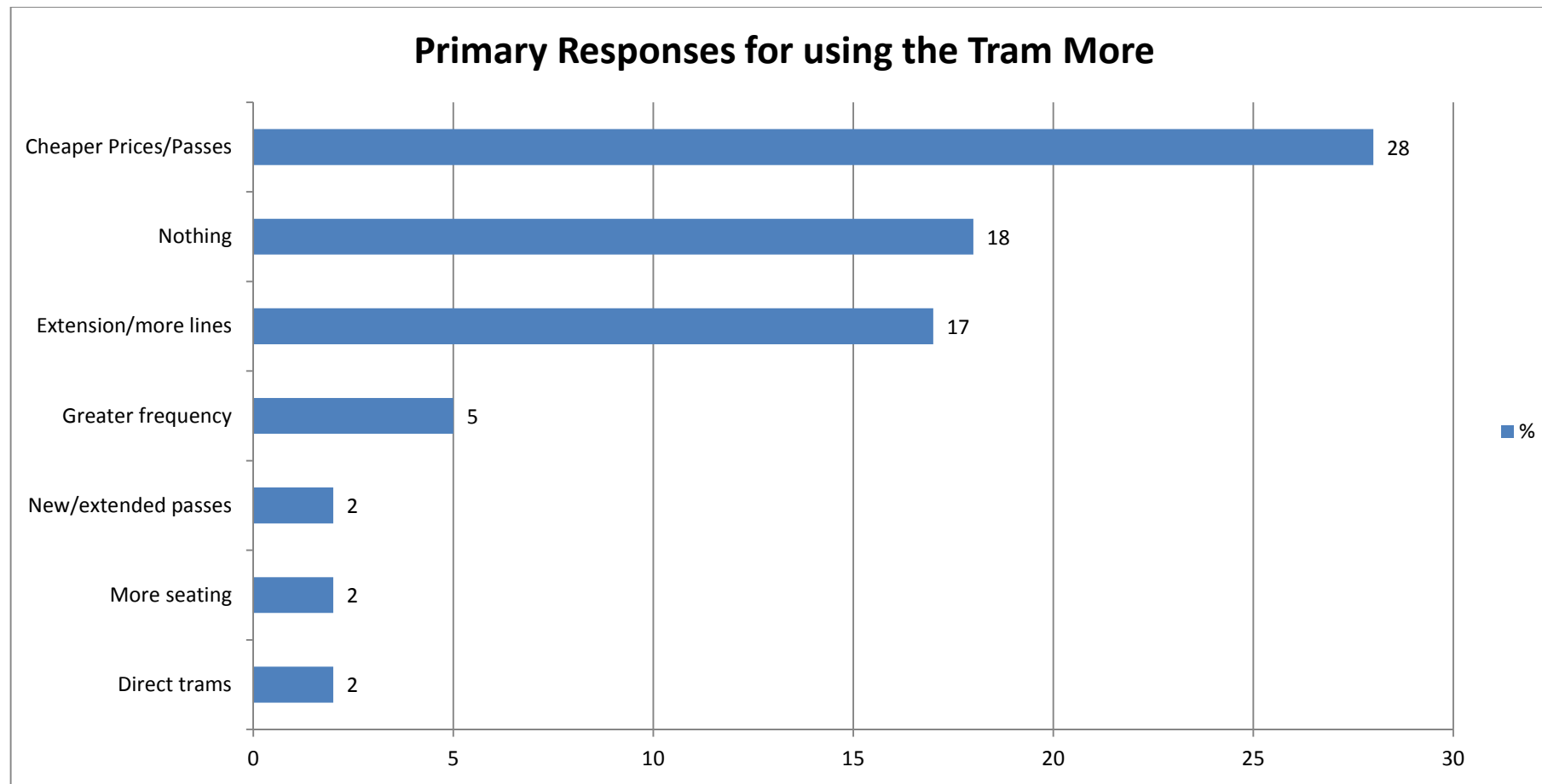
What do you like most about the tram?

Primary Responses for using the Tram



Base 1024

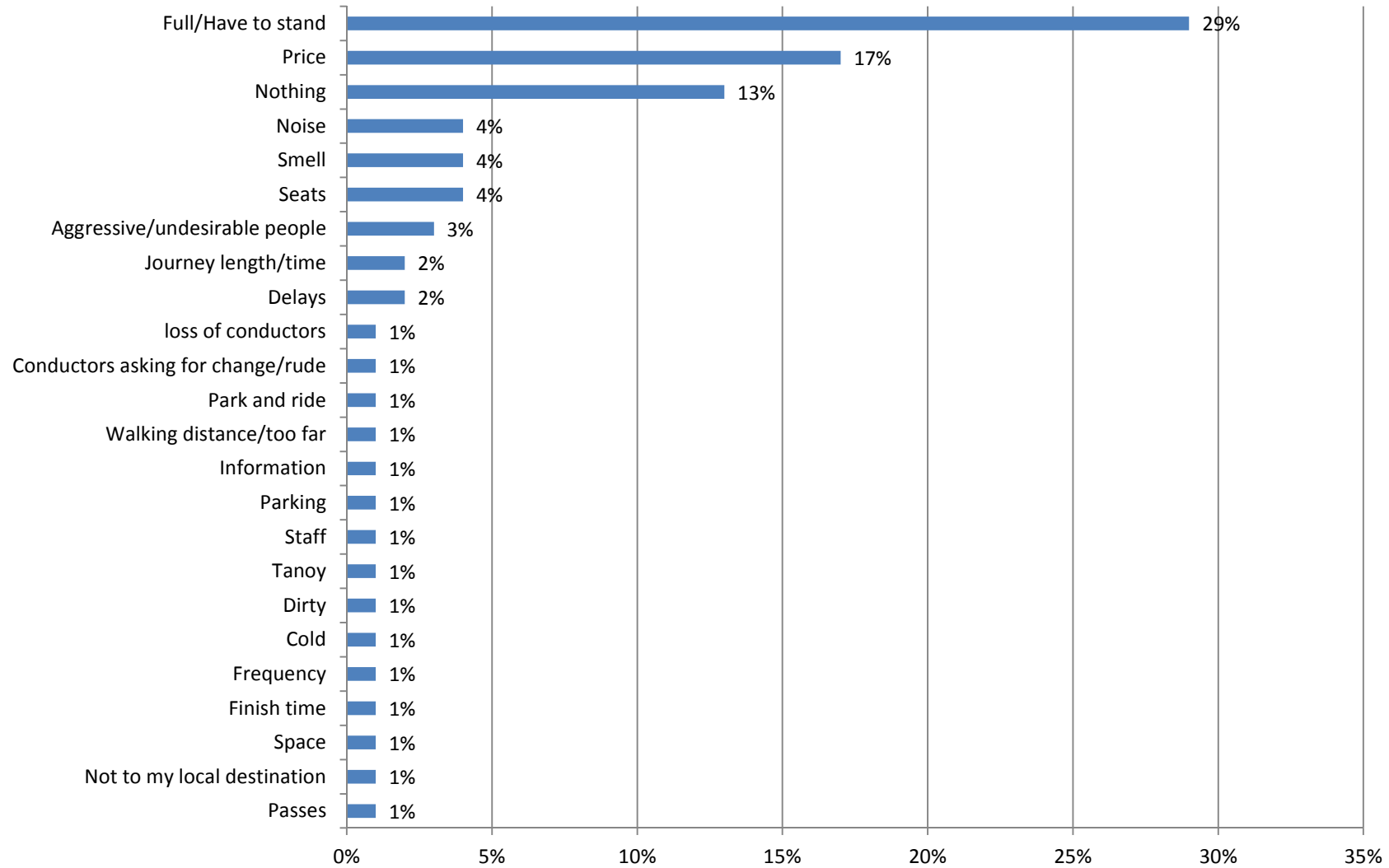
What would help you use the Tram more?



Base 564

There were some comments made about combination passes not being available beyond defined boundaries e.g. into Hucknall, whilst not significant enough to be identified on their own they do appear in all qualitative statements.

What do you not like about the tram?



Summary Conclusions

Positive Comments

It is clear from the results that customer satisfaction levels have been maintained at 94%. This figure hides the fact that in all measured areas, both at the tram stop and on-board the tram, have all shown improvements based on the last measured results in 2010.

The website continues to grow in usage with over 50% of respondents saying that they had used the website at some point with 90% of users finding the site useful and 65% identifying that they found it 'Good Quality'.

Over 99% of respondents found the NET service easy to use.

Negative Comments

In reviewing negative aspects of the service we must look to the qualitative questions where dissatisfaction has been voiced rather than depressing the overall satisfaction scores. Again this year price has been mentioned by c.30% of respondents as being an issue. Looking deeper this is again affected by prices for short journeys and off-peak times.

Although the plans for new lines are widely known it would still appear that 17% of respondents would like to see further extensions and/or more stops.

The knowledge of purchasing tickets through PayPoint has improved considerably from 2010 when nearly half of people did not have sufficient knowledge. This year it is down to around 1/3 of respondents not having a sufficient knowledge.

Once again the frequency of trams has been highlighted with people commenting about a requirement for some earlier trams to allow them to catch earlier interconnections, a greater frequency during peak times to reduce overcrowding and trams running later into the night.

NET CUSTOMER SURVEY AND SERVICE IMPROVEMENT PLAN

APPENDIX B: SUMMARY OF SERVICE IMPROVEMENT PLAN 2013

- Tram vehicles refresh
- Arrival of new Citadis vehicles
- Bulwell track improvement works
- Noel Street diamond crossing change
- Tramstop Works:
 - Installation of Ticket Vending Machines
 - Station Street Footbridge removal
 - Opening of NET Information and dedicated Customer Service Centre
- Introduction of Off-Tram Ticketing
 - New ticketing and smart-card technology and usage
 - New fares products
 - Change from conducting to revenue protection
- Depot extension works and systems improvements