

Audit, Standards and Risk Committee

Wednesday, 17 July 2024

SYMCA Annual Travel Survey (2024) Results

Is the paper exempt from the press and public? No

Reason why exempt: Not applicable

Purpose of this report: Discussion

Is this a Key Decision? No

Has it been included on the Forward Plan of Key Decisions? No

Director Approving Submission of the Report:

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Executive Summary

To allow South Yorkshire Mayoral Combined Authority to understand how customers and passengers perceive the standard and quality of our public transport network, it commissions an annual travel survey.

The survey approach uses representative telephone research to track satisfaction and travel behaviours on bus, tram and train and has been conducted in South Yorkshire since 2005.

This paper presents the latest annual survey findings for Committee members to consider.

What does this mean for businesses, people and places in South Yorkshire?

An effective bus and tram network is essential for the region to allow residents to access employment, education, healthcare and other services. It is central to support our communities, economic plans and our regional growth ambitions.

Understanding how residents view the network is therefore important in allowing us to develop plans for improvement.

Recommendations

That the ASRC members:

1. Note the key findings of the survey and share any observations appropriate to ensuring that SYCMA plans take in to account customer views.
2. Endorse the need to continue to run an annual travel survey in 2025 and beyond, to assist with setting customer targets and ambitions aligned to SYMCA policy ambitions, including but not limited to bus reform.
3. Support the proposal that SYMCA develops a “You Said, We Did” approach to sharing the survey results with residents of South Yorkshire.

Consideration by any other Board, Committee, Assurance or Advisory Panel

None

N/A

1. Background

1.1 The Travel Survey is SYMCA's core piece of strategic transport research across South Yorkshire, covering the four Local Authorities and all modes of transport. The results provide evidence and inform decision making, budget setting and business planning. The survey covers:

- Use of public and active travel, and associated customer profiling
- Passenger satisfaction and perceptions of the bus, tram and train in South Yorkshire, as well as active travel
- Public transport information
- Public transport ticketing
- Public transport improvements required for the future

1.2 For over 10 years the data was collected via a postal questionnaire, and this then changed in 2017 to a telephone methodology. In 2022/23 the survey adopted a hybrid data collection approach, through the use of telephone and online surveying.

The research was conducted via a telephone survey of 1,252 residents living in South Yorkshire. The survey took place over a five-week period between the end of January and start of March 2024.

1.3 Quotas were set based on the latest census population data available to ensure that the survey sample is demographically representative of the local population. Quotas were set by gender, age, district, employment status and car ownership. Interviews were conducted at different times of the day and different days of the week, including evenings and weekends, to ensure that working age residents were interviewed. Only one person per household was interviewed.

1.4 The questionnaire was drafted in conjunction with SYMCA, based on previous surveys, to capture information to answer the aims and objectives of the research. Many of the questions are drawn from previous national and local research to

ensure questions are tried and tested and allow for comparison. A copy of the questionnaire is included in the Appendix.

2. Key Findings

2.1 Key findings from the research worth noting are:

- 73% of respondents are regular public transport users (i.e. use it at least once a month)
- There remains an understandable inverse relationship between car use and the use of public transport and active travel. Respondents without access to a car are more likely to use public transport (97% are public transport users, including 89% regularly compared with 89% of car users that use public transport including 67% regularly).
- Public transport satisfaction levels are generally positive amongst regular users.
 - 40% of respondents are at least fairly satisfied with the **local bus services** overall, and 18% dissatisfied, with satisfaction highest amongst regular bus users (60% satisfied)
 - 36% of respondents are at least fairly satisfied with the **local train services** overall, and 6% dissatisfied, with satisfaction highest amongst regular train users (75% satisfied)
 - 33% of respondents are at least fairly satisfied with the **local tram services** overall, and 3% dissatisfied, with satisfaction highest amongst regular tram users (84% satisfied)
 - 90% are regular walkers (i.e. at least monthly and most of these walk on a weekly basis)
 - Over half (52%) are satisfied with the current provision of public transport information overall, with no notable demographic or transport mode differences.
- Over a third cited better reliability/punctuality (35%) or more frequent bus services (34%), 16% mentioned cheaper fares and 14% more direct routes/fewer changes, similarly top cited improvements to those in 2022-23. 63% of regular bus users said these changes would encourage them to use the bus service more, and 39% of non-bus users said they would be more likely to use bus services.
- Cheaper fares, more frequent services and better reliability/punctuality were the top cited tram improvements (similar to 2022/23). 61% of regular tram users said these changes would encourage them to use the tram service more, and 9% of non-tram users said they would be more likely to use tram services.
- Over a third (38%) of respondents would like major improvements to the bus service, while 14% want major improvements to train services and 9% major improvements to trams.

2.2 A full summary of the findings can be found in the final report included in the Appendix.

3. Options Considered and Recommended Proposal

3.1 Option 1

3.2 Endorse the need to continue to undertake annual travel survey activity with residents of South Yorkshire, alongside more targeted research activity, to ensure we have comprehensive view of passenger (and non-user) perception of public transport.

3.3 **Option 1 Risks and Mitigations**

3.4 There is a need to ensure that passengers and residents of South Yorkshire do not face questionnaire or consultation fatigue given the number of planned and potential survey activity expected in 2024/25.

3.5 **Option 2**

3.6 Not applicable.

3.7 **Option 2 Risks and Mitigations**

Not applicable.

3.10 **Recommended Option**

Not applicable.

4. **Consultation on Proposal**

4.1 Not applicable.

5. **Timetable and Accountability for Implementing this Decision**

5.1 The next annual travel survey is planned to take place between January and March 2025. To meet this timescale, any changes to the survey approach, methodology and questionnaire would need to be decided by the end of October 2024.

6. **Financial and Procurement Implications and Advice**

6.1 The costs of the annual travel survey are incorporated into the base revenue budget for SYMCA.

7. **Legal Implications and Advice**

7.1 Not applicable.

8. **Human Resources Implications and Advice**

8.1 Not applicable.

9. **Equality and Diversity Implications and Advice**

9.1 As noted in 1.3, the survey seeks to provide appropriate representation across communities and customer demographics to ensure there is suitable input from all passenger types.

10. Climate Change Implications and Advice

10.1 Not applicable.

11. Information and Communication Technology Implications and Advice

11.1 Not applicable.

12. Communications and Marketing Implications and Advice

12.1 It is recommended that SYMCA develops a “You Said, We Did” approach to sharing the results of the survey, making a more explicit connection between the findings and the changes to the public transport network that it is able to influence or change.

List of Appendices Included

A Annual Travel Survey Final Report

B Questionnaire