Appendix A

South Yorkshire Mayoral Combined Authority: Annual Travel Survey 2023-24

Report – April 2024

SOUTH YORKSHIRE SYMCA MAYORAL COMBINED AUTHORITY

Research
Evaluation
Community Engagement
Strategy Development

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Introduction

South Yorkshire Mayoral Combined Authority (SYMCA) has conducted a travel survey via representative telephone research to track satisfaction and travel behaviours on bus, tram and train in South Yorkshire since 2005. For over 10 years the data was collected via a postal questionnaire and changed in 2017 to a telephone methodology. In the most recent iteration (2022-23) the survey adopted a hybrid data collection approach, through the use of telephone and online surveying.

The Travel Survey is SYMCA's core piece of strategic research across South Yorkshire, covering the 4 Local Authorities and all modes of transport. The results evidence and inform key business decisions, 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

This report presents the results of the 2023-24 survey.

The report includes analysis by customer demographics, where statistically significant and meaningful patterns, differences and similarities are identified. It also includes comparison, where relevant, to the 2022-23 survey results. Please note the caveat with comparison, given the different methodology used in 2022-23. Comparisons prior to 2022-23 are not made due to the Covid-19 pandemic affecting comparability with travel behaviour and attitude research.

These findings are the key headlines and SYMCA also has access to separate detailed data tables.

Methodology

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.

A 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. The questionnaire was tested with a small number of residents prior to its full implementation.

Quotas were set based on the latest 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.

With 1,252 respondents, the survey provides for robust data. At this number of respondents, the sample error or accuracy of the survey results is +/- 2.8% at a 95% confidence level.

This means that we can be 95% confident that the “real” result for any given question, if a census were undertaken, would be within 2.8 percentage points of those stated within the survey findings. This provides for robust data when analysed at a headline level and when different questions are cross-referenced against each other. It also allows for reliable comparison over time and nationally. When comparing the overall results of earlier residents’ surveys, differences of +/-6% are generally considered statistically significant.

The following table shows the demographic profile of respondents to the survey:

Demographic	Percentage of interviews
Gender	
Male	49%
Female	51%
Age	
18-34	31%
35-64	46%
65+	23%
District	
Barnsley	18%
Doncaster	22%
Rotherham	19%
Sheffield	41%
Employment status	
In employment	55%
Not employment	45%
Car ownership	
None	26%
1 or more	74%

Note: All quotas were achieved within 2 to 3 percentage points of their target and the results ‘re-weighted’ to be fully in line with the latest local population demographics.

Summary of key findings

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Overview and public transport improvements

Overall, **73% of respondents are regular public transport users** (i.e. use it at least once a month), 19% infrequent public transport users and 9% non-public transport users. In addition, 90% are regular walkers and 27% regular cyclists. These levels are broadly similar to those in 2022-23.

There is a **close relationship between different modes of public transport use**, and also with active travel, in that often more than one form of public transport and/or active travel is adopted.

There is generally an **inverse relationship between car use and 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).

Some demographic groups are more or less likely to use public transport and active travel, which highlights the **importance of segmentation and targeting of marketing, initiatives and service provision and improvements.**

Public **transport satisfaction levels are generally positive amongst regular users**, although there is scope to increase these levels. This includes relatively lower bus satisfaction for frequency, length of waiting, timing and reliability of services, as well as opportunities to increase satisfaction with safety, waiting facilities and service information at bus stops. For trains, there are lower satisfaction levels for reliability and VfM, as well as opportunities to improve waiting facilities and the range of services offered at stations. For trams, there are lower ratings for VfM.

Over a third of respondents would like **major improvements** to the bus service, while 14% want major improvements to train services and 9% major improvements to trams. Improvements are more likely to be cited by regular users of public transport.

Over a third cited **better reliability/punctuality or more frequent bus services**, 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.

Almost a **fifth cited cheaper train fares**, 12% better reliability/punctuality and 8% more frequent services, similarly top cited improvements to those in 2022-23. 62% of regular train users said these changes would encourage them to use the train service more, and 19% of non-train users said they would be more likely to use train services.

Half said they are not interested in using the tram (often related to geography/proximity to the tram) and over a quarter said improvements are not needed, while **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.

There are notable proportions that said they are not interested in using public transport, highlighting the **intransigent nature of some groups**, despite potential service improvements.

Summary of key findings (1)

Travel behaviour and car use:

Car as a driver is **the most common mode of transport** (49% daily and 69% at least monthly), followed by walking, while 73% of respondents use at least one form of public transport a month (and 90% travel by car as a driver or passenger monthly). 69% of car drivers also use the bus. 59% use trains and 49% trams.

70% of car drivers said they **use this mode because it is convenient**, 9% said it is quicker and 9% said it is the best way to their destination, 5% said it is cheaper and 3% said they had no other option.

Car usage is **similar to 2022-23.**

Respondents **aged 16-24 are less likely** to use a car as a driver (56%), while **those aged 45-54 are most likely to use a car as a driver on a daily basis** (82%) (although 89% of 16-24 year olds use a car as a passenger compared with 73% of older residents, while those aged 45-54 are less likely than others to be a passenger on a daily basis – 5% compared with 12% of others).

Women are less likely to use a car as a driver (63%) than men (76%) (although 79% of women use a car as a passenger compared with 71% of men).

Disabled respondents are more likely to use a car as driver on a weekly basis (78%) than non-disabled respondents (67%).

Employed respondents are more likely to use a car as a driver on a daily basis – 63% compared with 33% that are not employed.

Bus use:

Over half are regular users (57%) (i.e. at least monthly), 17% infrequent users and 25% non-users, with regular usage similar to 2022-23. 65% of bus users are also train users and 56% use the tram.

Respondents **aged 25-34 are less likely to be bus users than other age groups**: 60% are bus users compared with 77% of other age groups. **Men are slightly more likely to be weekly bus users than women:** 41% use the bus on a weekly basis compared with 34% of women. **Employed respondents are less likely to be bus users than respondents that are not employed:** 67% are bus users compared with 83% of respondents that are not in employment.

Respondents that **do not have access to a car are more likely to be bus users:** 91% are bus users, including 68% on a weekly basis, compared with 69% of car owners (including 26% on a weekly basis).

Almost half of bus users said they **travel by bus because they have no alternative** (which is partly linked to lack of car ownership), while **shopping** and to a lesser extent **leisure and work** are the main destinations.

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).**

The majority of bus users are **satisfied with journey length, destinations, seamlessness and VfM of bus services**, with lower ratings for frequency, length of waiting, timing and reliability of services.

Summary of key findings (2)

Train use:

A third (33%) are regular users (i.e. at least monthly), 28% infrequent users and 39% non-users, with regular usage similar to 2022-23. 79% of train users are also bus users and 51% are tram users.

Respondents **aged 16-24 are most likely to be train users (78%) compared to older age groups** (58%). **Disabled respondents are less likely** to use the train (56%) compared to non-disabled respondents (64%). **Employed respondents are slightly more likely** to use the train (64%) compared with other respondents (58%).

Whilst car owners and non-car owners have similar overall levels of train use, **non-car owners are more likely to use the train on a weekly basis:** 20% compared with 9% of car owners.

Almost two-thirds of train users said they **travel by train as it is the quickest way to get to their destination**, while **leisure** and to a lesser extent **visiting people, shopping and work** are the main destinations.

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).**

The majority of train users are **satisfied with destinations, journey length, seamlessness, wait times, frequency and timings**, with lower ratings for reliability of services and VfM.

Tram use:

Almost a third (30%) are regular users (i.e. at least monthly), 22% infrequent users and 48% non-users, with regular usage similar to 2022-23. 81% of tram users are also bus users and 61% are train users.

Respondents **aged 16-24 are most likely to be tram users (57%) and also respondents aged 55-74** (62% tram users). **Disabled respondents are more likely** to be tram users (64%) compared to non-disabled respondents (47%). **Employed respondents are less likely** to be tram users (46%) than respondents that are not employed (59%).

Non-car owners are more likely to be tram users: 58% are tram users compared with 49% of car owners.

Over a third of tram users said they travel by tram as it is **convenient and the quickest way to get to their destination**, while **shopping and leisure**, and to a lesser extent **work** are the main destinations.

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).**

The majority of tram users are **satisfied with journey length, frequency, waiting times, seamlessness, reliability, timings, and destinations**, while VfM is lowest rated.

Summary of key findings (3)

Active travel - walking:

90% are regular walkers (i.e. at least monthly and most of these walk on a weekly basis), 2% infrequent walkers and 8% non-walkers. Walking levels are similar to 2022-23. 77% of walkers are also bus users, 65% train users and 52% tram users. Overall, 73% use at least one form of public transport a month. 41% of walkers are also cyclists.

Respondents **aged 35-44 are slightly less likely to walk** (81%) than other respondents (93%). **Men (88%) are less likely to walk** than women (95%). There are not any notable differences between disabled respondents and non-disabled respondents, although **non-disabled respondents are more likely to walk on a daily basis.**

64% of walkers said they use this mode because it is **convenient**, 12% said it is the best way to get to where they are going, 8% for exercise and 3% each for speed and cheapness.

Car users said they did not walk for their most recent journey because it takes too long (39%), is not available/possible (21%), not convenient (8%) or due to mobility/health reasons (6%).

78% walk for **exercise** (including almost half on a daily basis), 77% walk to the **local shops**, 59% **to/from bus stops**, 50% to **visit people** and 48% to **local amenities**, while lesser numbers walk to the train, tram, work or education.

Active travel - cycling:

27% are regular cyclists, 10% infrequent cyclists and 63% non-cyclists, slightly lower than 2022-23 (although results are not directly comparable). 83% of cyclists are also bus users, 73% train users and 51% tram users. Overall, 75% use at least one form of public transport a month. 100% of cyclists are also walkers.

There are not any notable differences by demographics.

On a weekly basis, 17% of cyclists cycle for **exercise**, 7% cycle to the **local shops**, 3% to local amenities, 3% to/from a place of work, 3% to visit friends/relations, and 2% to/from education.

Car users said they did not walk for their most recent journey because cycling is not available/possible (31%), takes too long (5%), not convenient (4%), mobility/health reasons (3%), and safety (1%).

51% said 'don't know/NA' - this likely includes some that do not own a cycle, which may **indicate a lack of knowledge about cycling opportunities.**

Summary of key findings (4)

Public transport information:

Almost two-thirds **use an app or online timetable** and 11% use Google journey planner to check for service information before leaving home, a similar order to the previous survey.

There are **not any notable demographic differences**, although train users (73%) are more likely to use an app or on-line timetable to plan their journey than other public transport users (bus – 63% / tram – 61%).

Over a quarter use electronic displays and a similar number use online timetables, with 15% using a mobile app, 10% Google journey planner and 8% paper timetables when at a stop/platform, a similar order to the previous survey. There are not any notable demographic differences.

93% of respondents have a smart phone with internet access and almost all have access to either a smart phone, internet access at home and/or at work/school/college. 97% of under 55s have a smart phone compared with 86% of respondents aged 55+.

Over half (52%) are **satisfied with public transport information** overall, with no notable demographic or transport mode differences.

Public transport facilities:

Most bus users are **satisfied with facilities at bus stops**, especially convenience (86% satisfied), and results compare favourably to 2022-23, although there is scope to improve safety, waiting facilities and service information.

The majority of public transport users are **satisfied with facilities at bus stations and public transport interchanges** (with low levels of dissatisfaction), and results are broadly similar to 2022-23.

Most train users are **satisfied with facilities at train stations**, and results are broadly similar to 2022-23, although waiting facilities and range of services offered have relatively high levels of dissatisfaction.

Most tram users are satisfied with **facilities at tram stops**, and results are broadly similar to 2022-23.

Public transport tickets:

Public transport users will **typically use the operator website (42%) or Apps (33%)** such as the trainline or other travel related apps **to find out about what tickets are available.**

Price (49%), followed by convenience (26%) and flexibility (14%), is the main factor determining ticket type. Respondents aged 25-59 (58%) are more likely than others (38%) to mention price. Employed respondents (21%) are more likely than non-employed respondents to cite flexible travel.

Bus and tram users mainly purchase tickets on-vehicle, while train users mainly purchase online or via a ticket app, with most happy with their method of purchase. The most commonly cited ticket type purchased in the last year is a single/return ticket, followed by a day pass and for bus users longer period passes.

Travel behaviour and car use

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Car as a driver is the most common mode of transport (49% daily and 69% at least monthly), followed by walking, while 73% of respondents use at least one form of public transport a month (and 90% travel by car as a driver or passenger monthly)

	5+ days a week	3-4 days a week	1-2 days a week	Once a fortnight	About once a month	At least annually	More than a year ago	Never
Bus (1252)	12%	10%	15%	7%	13%	4%	13%	25%
Car as a driver (1250)	49%	10%	7%	1%	2%	1%	0%	31%
Car as a passenger (1230)	11%	16%	26%	12%	6%	4%	1%	25%
Cycle (1240)	3%	6%	7%	6%	5%	5%	5%	63%
Walk (1245)	42%	17%	23%	4%	3%	2%	0%	8%
Train (1234)	2%	3%	6%	5%	16%	9%	19%	38%
Tram (1252)	2%	4%	6%	5%	13%	6%	16%	47%
Motorcycle (1240)	0%	1%	0%	0%	0%	0%	1%	97%
Scooter (1249)	0%	0%	0%	0%	2%	0%	1%	96%
Taxi (1243)	1%	1%	3%	12%	15%	21%	5%	42%
Park & Ride using bus for onward journey (1245)	0%	0%	3%	2%	0%	2%	1%	91%
Park & Ride using tram for onward journey (1237)	0%	0%	1%	2%	1%	2%	1%	91%
Park & Ride using train for onward journey (1242)	0%	1%	0%	2%	0%	1%	1%	94%

Question asked: How often do you travel by each of the following forms of transport? Numbers in brackets are the number of respondents to each mode of transport.

Car use as driver: 69% are regular drivers (i.e. at least monthly), 1% infrequent drivers and 31% non-drivers

Respondents aged 16-24 are less likely to use a car as a driver (56%), while those aged 45-54 are most likely to use a car as a driver on a daily basis (82%) (although 89% of 16-24 year olds use a car as a passenger compared with 73% of older residents, while those aged 45-54 are less likely than others to be a passenger on a daily basis – 5% compared with 12% of others).

Respondents in Sheffield are less likely to use a car as a driver on a daily basis (43%), while those in Rotherham are most likely to drive on a daily basis (59%).

Women are less likely to use a car as a driver (63%) than men (76%) (although 79% of women use a car as a passenger compared with 71% of men).

Employed respondents are more likely to use a car as a driver on a daily basis – 63% compared with 33% that are not employed.

Disabled respondents (that said their disability limits their mobility a lot) are more likely to use a car as driver on a weekly basis (78%) than non-disabled respondents (67%).

70% of car drivers said they use this mode because it is convenient, 9% said it is quicker and 9% said it is the best way to their destination, 5% said it is cheaper and 3% said they had no other option.

In 2022-23, 67% of respondents were car drivers and 89% car passengers.

69% of car drivers also use the bus. 59% use trains and 49% trams.

Question asked: How often do you travel by each of the following forms of transport? Bus

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Bus use: 57% are regular users (i.e. at least monthly), 17% infrequent users and 25% non-users

Respondents aged 25-34 are less likely to be bus users than other age groups: 60% are bus users compared with 77% of other age groups.

There are no notable differences by district.

Men are slightly more likely to be weekly bus users than women: 41% use the bus on a weekly basis compared with 34% of women.

Employed respondents are less likely to be bus users than respondents that are not employed: 67% are bus users compared with 83% of respondents that are not in employment.

There are no notable differences between disabled and non-disabled respondents.

Respondents that do not have access to a car are more likely to be bus users: 91% are bus users, including 68% on a weekly basis, compared with 69% of car owners (including 26% on a weekly basis).

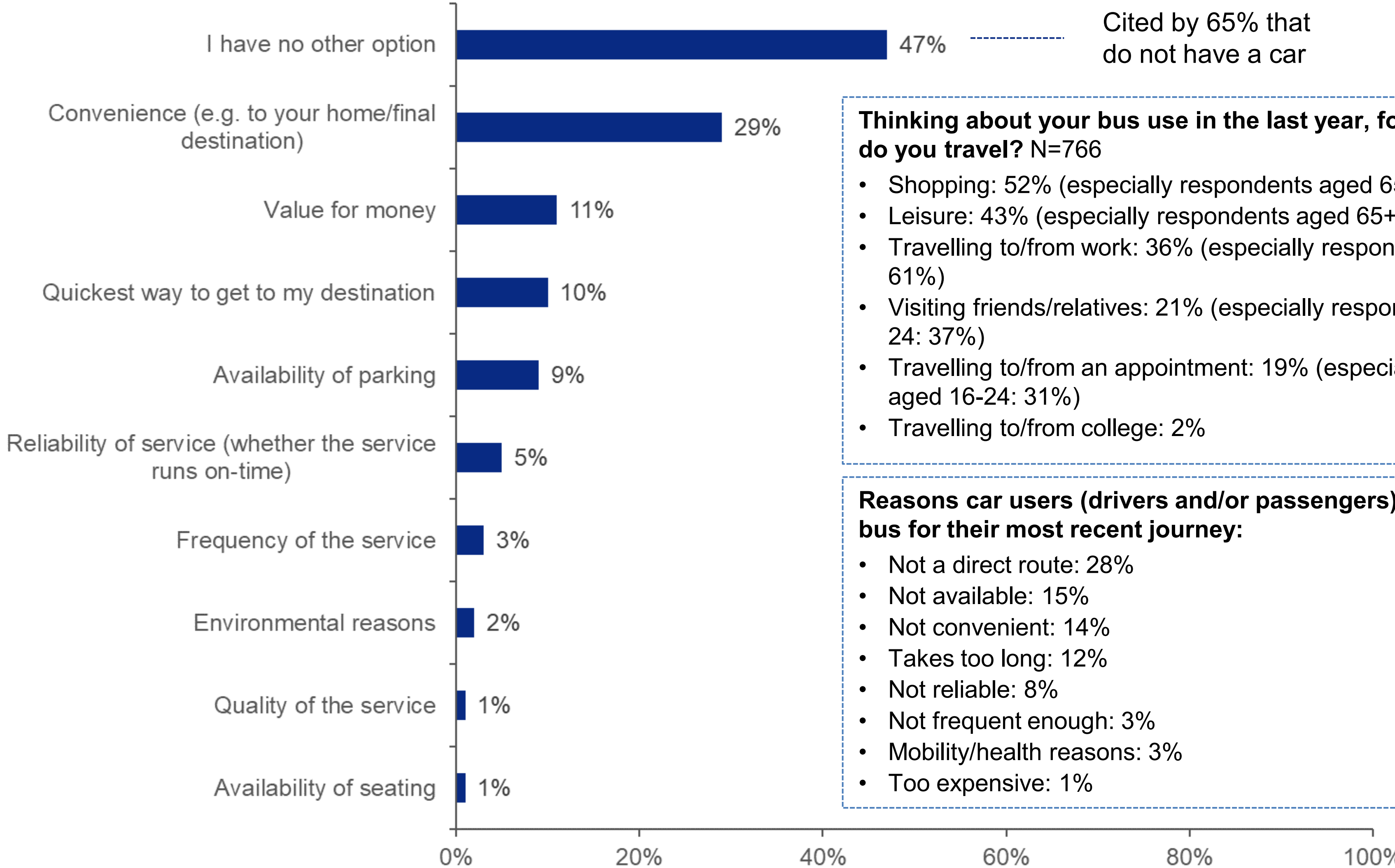
In 2022-23, 61% were regular users, 26% infrequent users and 13% non-users (note difficulties with comparison due to different survey methods).

65% of bus users are also train users and 56% use the tram.

Question asked: How often do you travel by each of the following forms of transport? Bus

Almost half of bus users said they travel by bus because they have no alternative (which is partly linked to lack of car ownership), while shopping and to a lesser extent leisure and work are the main destinations

Why do you choose to use the bus? N=766 (bus users only)



Cited by 65% that do not have a car

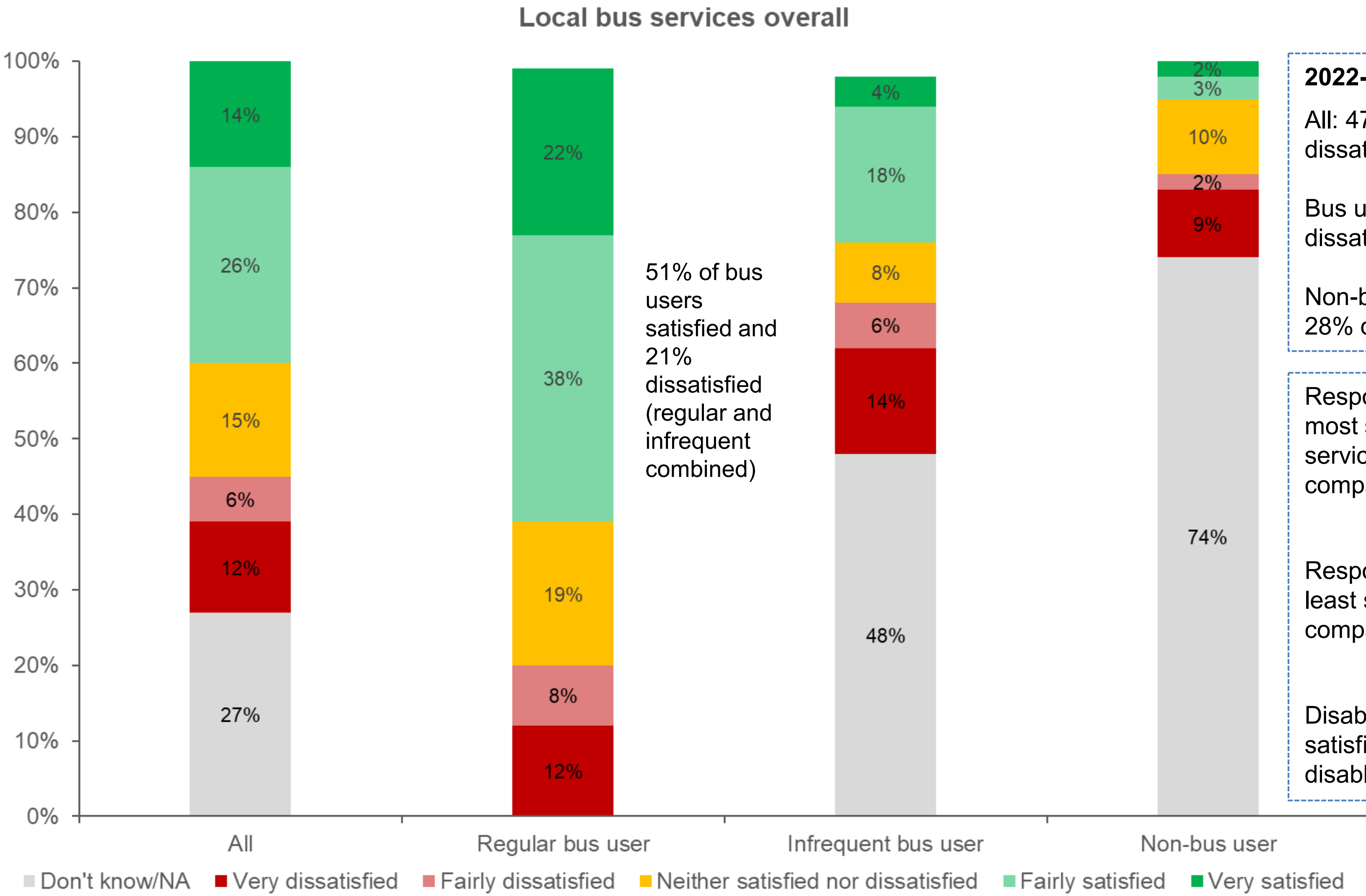
Thinking about your bus use in the last year, for what reasons do you travel? N=766

- Shopping: 52% (especially respondents aged 65+: 62%)
- Leisure: 43% (especially respondents aged 65+: 66%)
- Travelling to/from work: 36% (especially respondents aged 16-24: 61%)
- Visiting friends/relatives: 21% (especially respondents aged 16-24: 37%)
- Travelling to/from an appointment: 19% (especially respondents aged 16-24: 31%)
- Travelling to/from college: 2%

Reasons car users (drivers and/or passengers) do not use the bus for their most recent journey:

- Not a direct route: 28%
- Not available: 15%
- Not convenient: 14%
- Takes too long: 12%
- Not reliable: 8%
- Not frequent enough: 3%
- Mobility/health reasons: 3%
- Too expensive: 1%

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)



2022-23:

All: 47% satisfied / 28% dissatisfied.

Bus user: 55% satisfied / 28% dissatisfied.

Non-bus users: 35% satisfied / 28% dissatisfied.

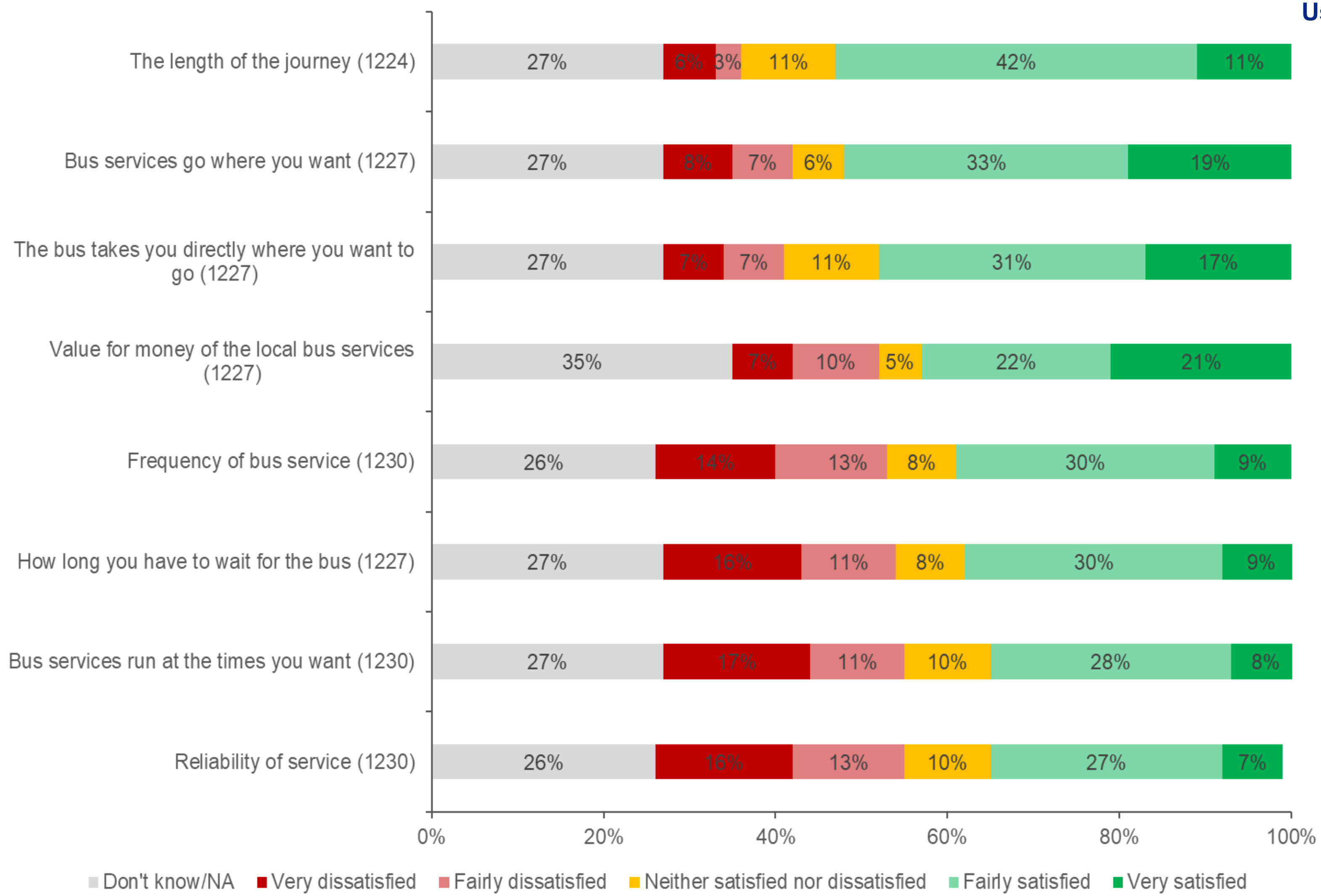
Respondents in Barnsley are most satisfied with their bus services overall – 56% compared with 36% elsewhere.

Respondents aged 25-44 are least satisfied: 31% satisfied compared with 44% of others.

Disabled respondents are more satisfied (49%) than non-disabled respondents (36%).

Question asked: Please indicate whether you are satisfied or dissatisfied with each of the following elements, whether you normally use the bus service or not. Number of respondents: 1,227.

The majority of bus users are satisfied with journey length, destinations, seamlessness and VfM of bus services, with lower ratings for frequency, length of waiting, timing and reliability of services



% satisfied

	Users	Non-users	2022-23 (all)
The length of the journey (1224)	68%	7%	59%
Bus services go where you want (1227)	67%	8%	56%
The bus takes you directly where you want to go (1227)	63%	4%	57%
Value for money of the local bus services (1227)	56%	5%	46%
Frequency of bus service (1230)	49%	7%	41%
How long you have to wait for the bus (1227)	50%	6%	38%
Bus services run at the times you want (1230)	46%	5%	44%
Reliability of service (1230)	44%	5%	34%

Question asked: Please indicate whether you are satisfied or dissatisfied with each of the following elements, whether you normally use the bus service or not. Numbers in brackets are the number of respondents.

Train use: 33% are regular users (i.e. at least monthly), 28% infrequent users and 39% non-users

Respondents aged 16-24 are most likely to be train users (78%) compared to older age groups (58%).

Respondents in Sheffield are least likely to be train users (52%), while respondents in Doncaster are most likely (74%).

There are no notable differences between men and women.

Employed respondents are slightly more likely to use the train (64%) compared with other respondents (58%).

Disabled respondents are less likely to use the train (56%) compared to non-disabled respondents (64%).

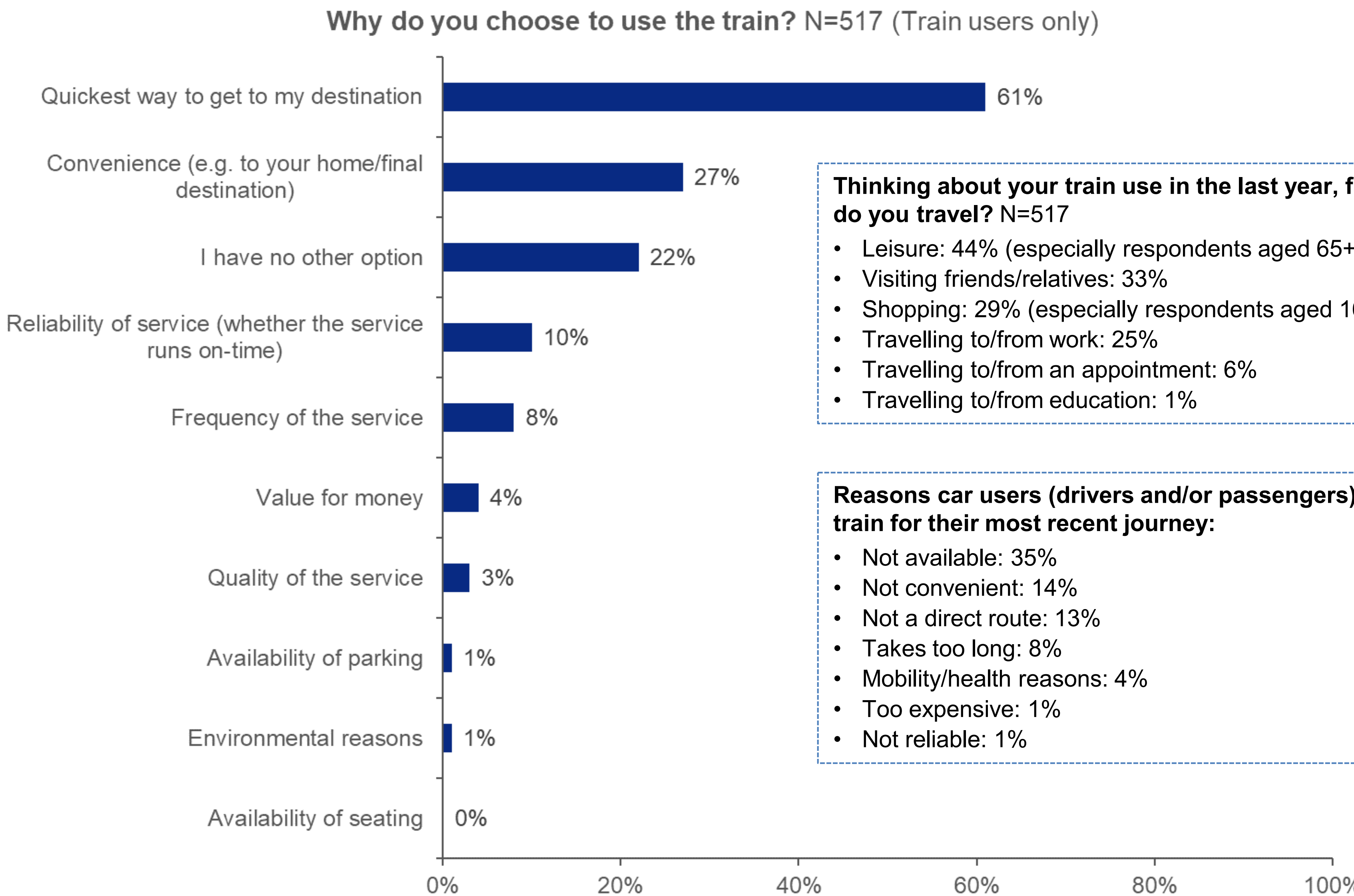
Whilst car owners and non-car owners have similar overall levels of train use, non-car owners are more likely to use the train on a weekly basis: 20% compared with 9% of car owners.

In 2022-23, 36% were regular users, 41% infrequent users and 23% non-users (note difficulties with comparison due to different survey methods).

79% of train users are also bus users and 51% are tram users.

Question asked: How often do you travel by each of the following forms of transport? Train

Almost two-thirds of train users said they travel by train as it is the quickest way to get to their destination, while leisure and to a lesser extent visiting people, shopping and work are the main destinations



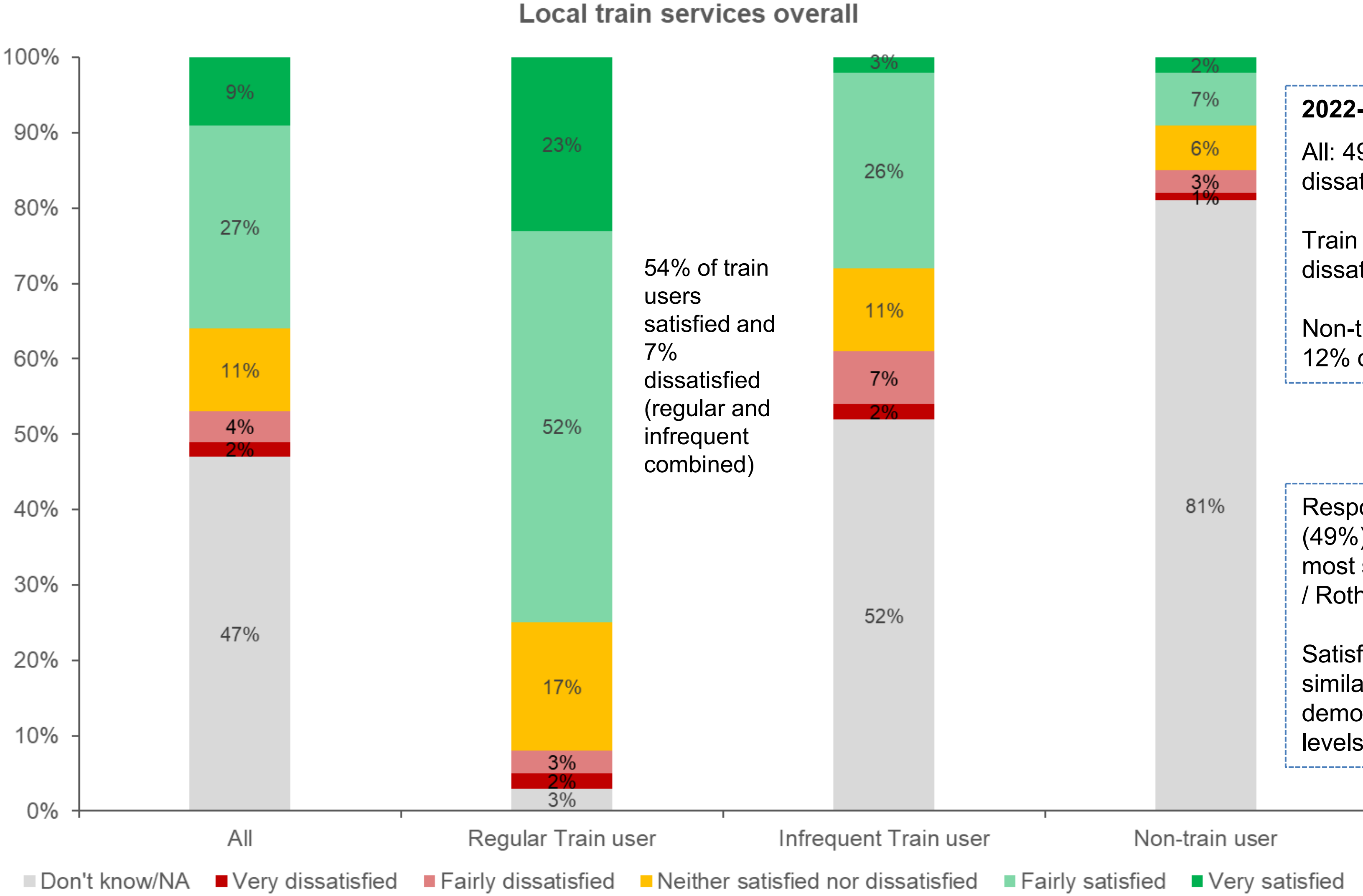
Thinking about your train use in the last year, for what reasons do you travel? N=517

- Leisure: 44% (especially respondents aged 65+: 75%)
- Visiting friends/relatives: 33%
- Shopping: 29% (especially respondents aged 16-24: 57%)
- Travelling to/from work: 25%
- Travelling to/from an appointment: 6%
- Travelling to/from education: 1%

Reasons car users (drivers and/or passengers) do not use the train for their most recent journey:

- Not available: 35%
- Not convenient: 14%
- Not a direct route: 13%
- Takes too long: 8%
- Mobility/health reasons: 4%
- Too expensive: 1%
- Not reliable: 1%

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)



2022-23:

All: 49% satisfied / 13% dissatisfied.

Train user: 67% satisfied / 15% dissatisfied.

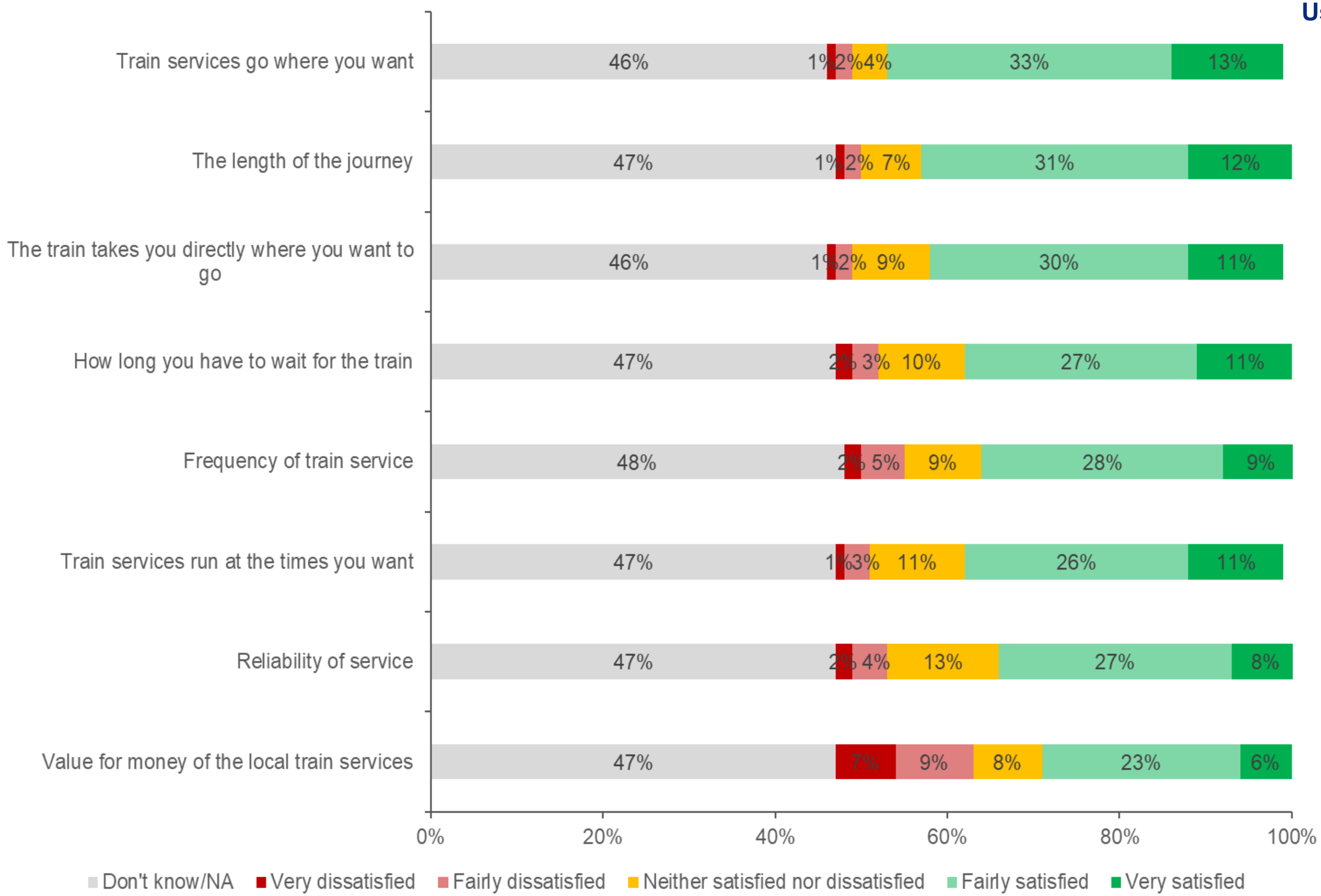
Non-train users: 40% satisfied / 12% dissatisfied.

Respondents in Doncaster (49%) and Barnsley (42%) most satisfied (Sheffield – 30% / Rotherham – 28%).

Satisfaction levels are broadly similar across other demographics, once usage levels are taken into account.

Question asked: Please indicate whether you are satisfied or dissatisfied with each of the following elements, whether you normally use the train service or not. Number of respondents: 1,206.

The majority of train users are satisfied with destinations, journey length, seamlessness, wait times, frequency and timings, with lower ratings for reliability of services and VfM



% satisfied

	Users	Non-users	2022-23 (all)
Train services go where you want	70%	11%	58%
The length of the journey	65%	10%	58%
The train takes you directly where you want to go	62%	9%	56%
How long you have to wait for the train	60%	5%	48%
Frequency of train service	59%	5%	48%
Train services run at the times you want	59%	6%	48%
Reliability of service	51%	9%	44%
Value for money of the local train services	43%	8%	36%

Question asked: Please indicate whether you are satisfied or dissatisfied with each of the following elements, whether you normally use the train service or not. Number of respondents: 1216 (for all elements).

Tram use: 30% are regular users (i.e. at least monthly), 22% infrequent users and 48% non-users

Respondents aged 16-24 are most likely to be tram users (57%) and also respondents aged 55-74 (62% tram users).

Respondents in Sheffield are most likely to be tram users (63%), followed by respondents in Rotherham (58%), Barnsley (40%) and Doncaster (35%). Sheffield respondents are also much more likely than others to be regular users – 48% compared with 17% of others.

There are no notable differences between men and women.

Employed respondents are less likely to be tram users (46%) than respondents that are not employed (59%).

Disabled respondents are more likely to be tram users (64%) compared to non-disabled respondents (47%).

Non-car owners are more likely to be tram users: 58% are tram users compared with 49% of car owners.

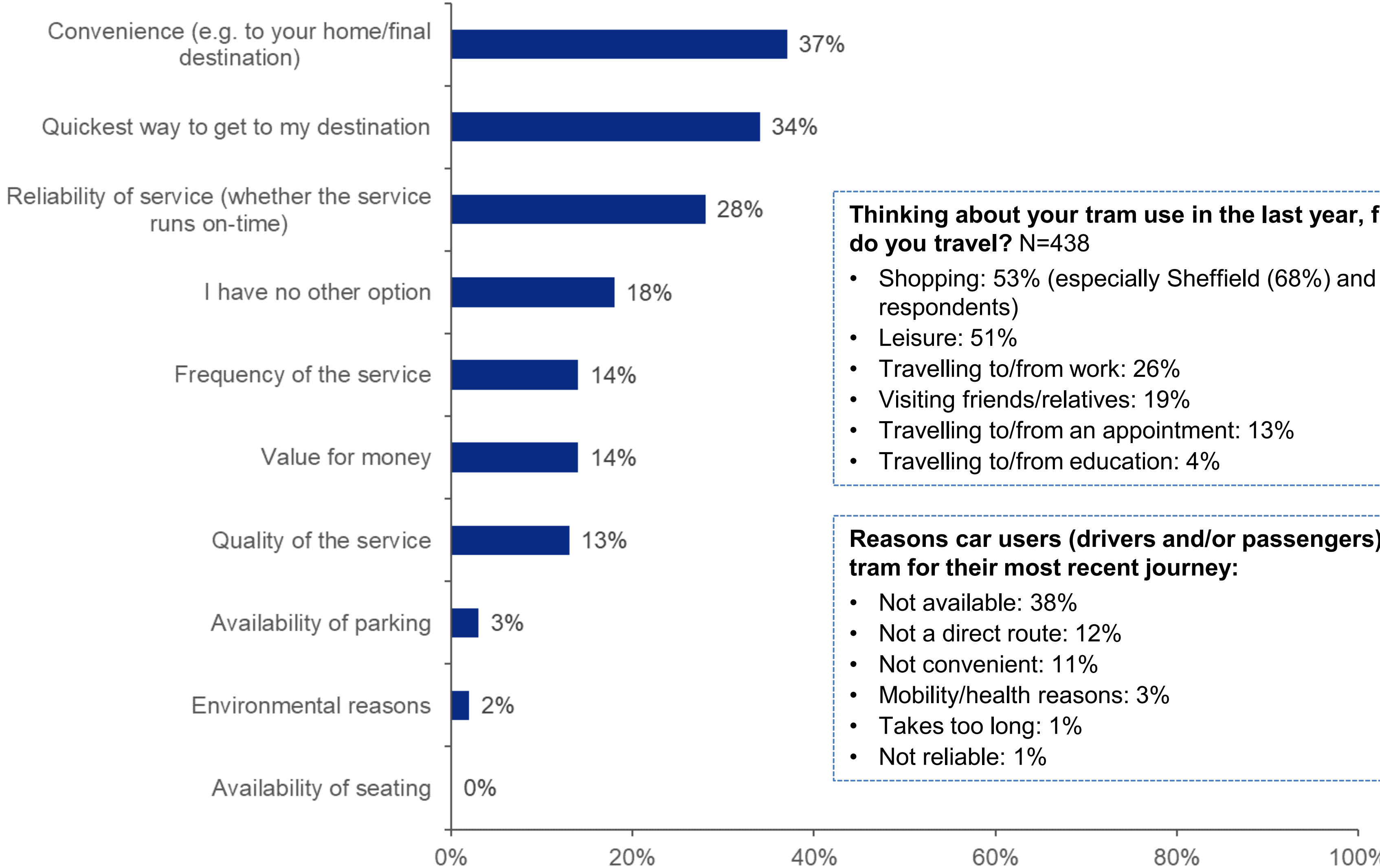
In 2022-23, 30% were regular users, 33% infrequent users and 36% non-users (note difficulties with comparison due to different survey methods).

81% of tram users are also bus users and 61% are train users.

Question asked: How often do you travel by each of the following forms of transport? Tram

Over a third of tram users said they travel by tram as it is convenient and the quickest way to get to their destination, while shopping and leisure, and to a lesser extent work are the main destinations

Why do you choose to use the tram? N=436 (Tram users only)



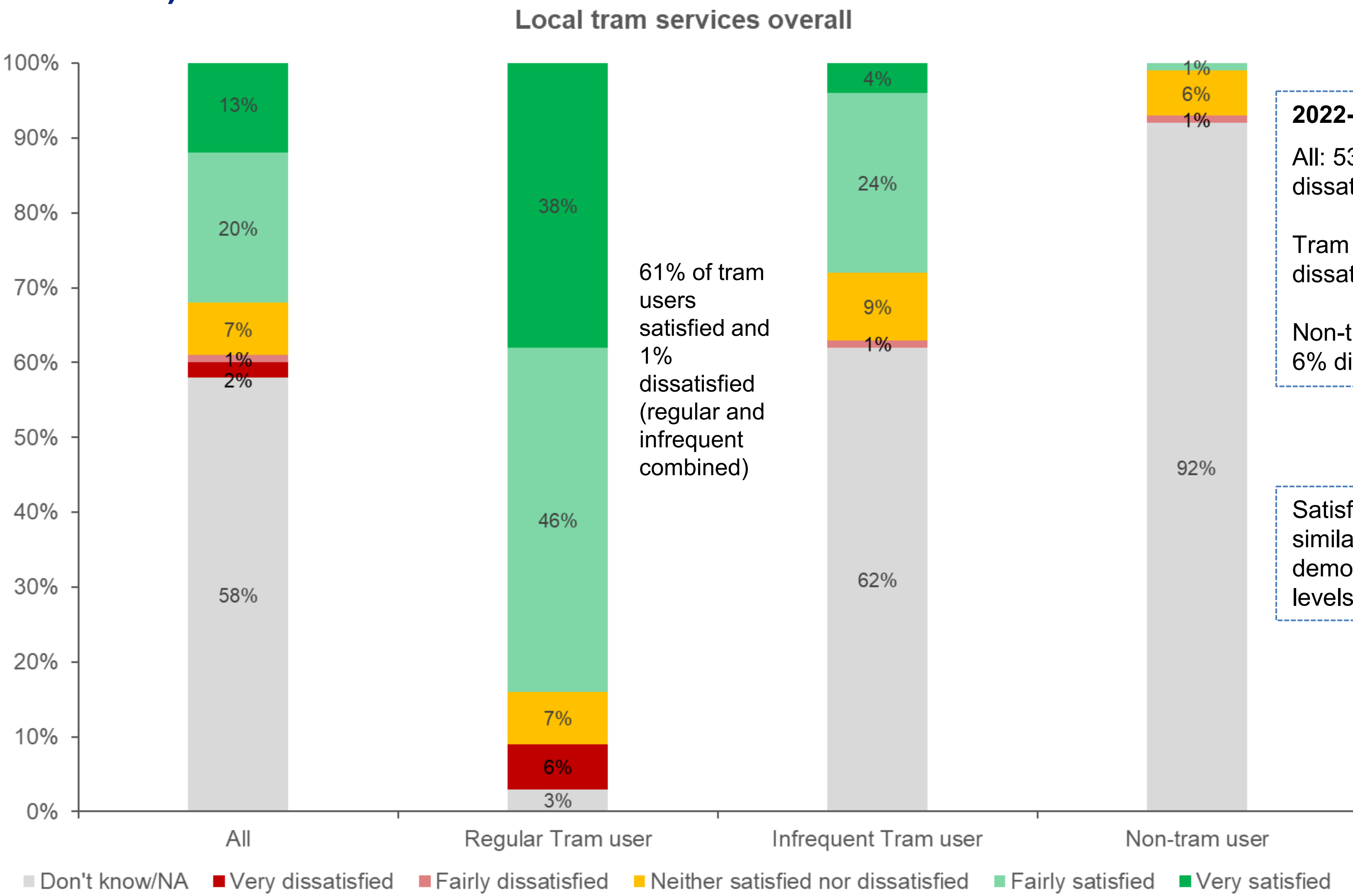
Thinking about your tram use in the last year, for what reasons do you travel? N=438

- Shopping: 53% (especially Sheffield (68%) and Rotherham (46%) respondents)
- Leisure: 51%
- Travelling to/from work: 26%
- Visiting friends/relatives: 19%
- Travelling to/from an appointment: 13%
- Travelling to/from education: 4%

Reasons car users (drivers and/or passengers) do not use the tram for their most recent journey:

- Not available: 38%
- Not a direct route: 12%
- Not convenient: 11%
- Mobility/health reasons: 3%
- Takes too long: 1%
- Not reliable: 1%

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)



2022-23:

All: 53% satisfied / 7% dissatisfied.

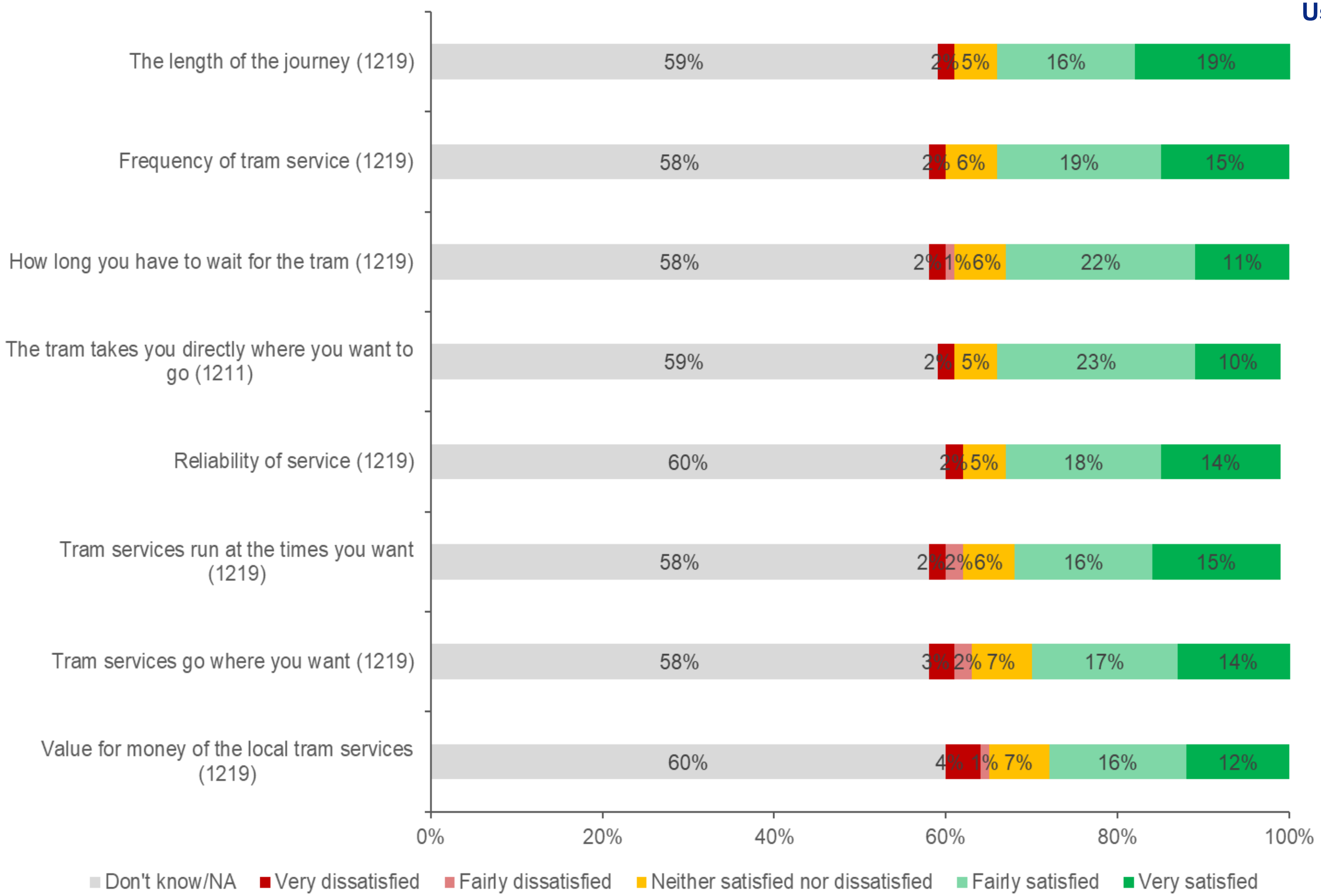
Tram user: 79% satisfied / 7% dissatisfied.

Non-tram users: 41% satisfied / 6% dissatisfied.

Satisfaction levels are broadly similar across different demographics, once usage levels are taken into account.

Question asked: Please indicate whether you are satisfied or dissatisfied with each of the following elements, whether you normally use the tram service or not. Number of respondents: 1,219.

The majority of tram users are satisfied with journey length, frequency, waiting times, seamlessness, reliability, timings, and destinations, while VfM is lowest rated



% satisfied

	Users	Non-users	2022-23 (all)
The length of the journey (1219)	64%	2%	54%
Frequency of tram service (1219)	63%	1%	52%
How long you have to wait for the tram (1219)	62%	1%	50%
The tram takes you directly where you want to go (1211)	63%	1%	48%
Reliability of service (1219)	60%	2%	53%
Tram services run at the times you want (1219)	59%	1%	49%
Tram services go where you want (1219)	57%	2%	48%
Value for money of the local tram services (1219)	51%	1%	42%

Question asked: Please indicate whether you are satisfied or dissatisfied with each of the following elements, whether you normally use the tram service or not. Numbers in brackets are the number of respondents.

Active travel

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Walking: 90% are regular walkers (i.e. at least monthly and most of these walk on a weekly basis), 2% infrequent walkers and 8% non-walkers

Respondents aged 35-44 are slightly less likely to walk (81%) than other respondents (93%).

Men (88%) are less likely to walk than women (95%).

There are not any notable differences between disabled respondents and non-disabled respondents, although non-disabled respondents are more likely to walk on a daily basis (46%) compared with disabled respondents (29%).

In 2022-23, 91% of respondents said they travel by walking.

77% of walkers are also bus users, 65% train users and 52% tram users. Overall, 73% use at least one form of public transport a month. 41% of walkers are also cyclists.

Respondents in Sheffield (86%) are slightly less likely to walk than other respondents (95%).

There are no notable differences between employed respondents and those that are not employed.

There are no notable differences between car owners and non-car owners.

64% of walkers said they use this mode because it is convenient, 12% said it is the best way to get to where they are going, 8% for exercise and 3% each for speed and cheapness.

Reasons car users (drivers and/or passengers) did not walk for their most recent journey:

- Takes too long: 39%
- Not available: 21%
- Not convenient: 8%
- Mobility/health reasons: 6%

Question asked: How often do you travel by each of the following forms of transport? Walking

78% walk for exercise (including almost half on a daily basis), 77% walk to the local shops, 59% to/from bus stops, 50% to visit people and 48% to local amenities, while lesser numbers walk to the train, tram, work or education

	More than once a day	Approx once a day	2-3 times a week	Approx once a week	Walk less than weekly	Never Walk
As a form of exercise (1239)	28%	17%	21%	7%	5%	22%
To get to local shops (1238)	6%	12%	37%	17%	4%	23%
To get to/from the bus stop (1239)	11%	7%	22%	3%	14%	41%
Visiting friends/relations (1217)	2%	5%	16%	13%	15%	50%
To get to local amenities (dentist, library, sports centre etc) (1238)	1%	4%	17%	8%	18%	52%
To get to/from the train station (1215)	4%	1%	6%	2%	18%	69%
To get to/from the tram stop (1223)	3%	1%	11%	2%	10%	73%
To get to directly to/from place of work (1212)	5%	2%	4%	3%	4%	83%
To get directly to/from education (1235)	1%	2%	3%	3%	2%	89%

Respondents without a car are more likely to walk to the above destinations than those with cars.

While disabled respondents are less likely to walk to the above destinations than non-disabled respondents.

Question asked: Thinking of a typical week, how often do you walk for the following purposes? Numbers in brackets are the number of respondents.

Cycling: 27% are regular cyclists, 10% infrequent cyclists and 63% non-cyclists

There are no notable differences by age.

There are no notable differences by gender.

There are no notable differences by disability.

In 2022-23, 34% of respondents said they travel by cycling.

Respondents in Barnsley (49%) and Rotherham (45%) are more likely to be cyclists than those in Sheffield (32%) and Doncaster (30%).

There are no notable differences between employed respondents and those that are not employed.

There are no notable differences between car owners and non-car owners.

83% of cyclists are also bus users, 73% train users and 51% tram users. Overall, 75% use at least one form of public transport a month. 100% of cyclists are also walkers.

On a weekly basis, 17% of cyclists cycle for exercise, 7% cycle to the local shops, 3% to local amenities, 3% to/from a place of work, 3% to visit friends/relations, and 2% to/from education.

Reasons car users (drivers and/or passengers) did not cycle for their most recent journey:

- Not available: 31%
- Takes too long: 5%
- Not convenient: 4%
- Mobility/health reasons: 3%
- Safety: 1%

51% said ‘don’t know/NA’ - this likely includes some that do not own a cycle, which may indicate a lack of knowledge about cycling opportunities.

Question asked: How often do you travel by each of the following forms of transport? Cycling

Public transport information

Research
Evaluation
Community Engagement
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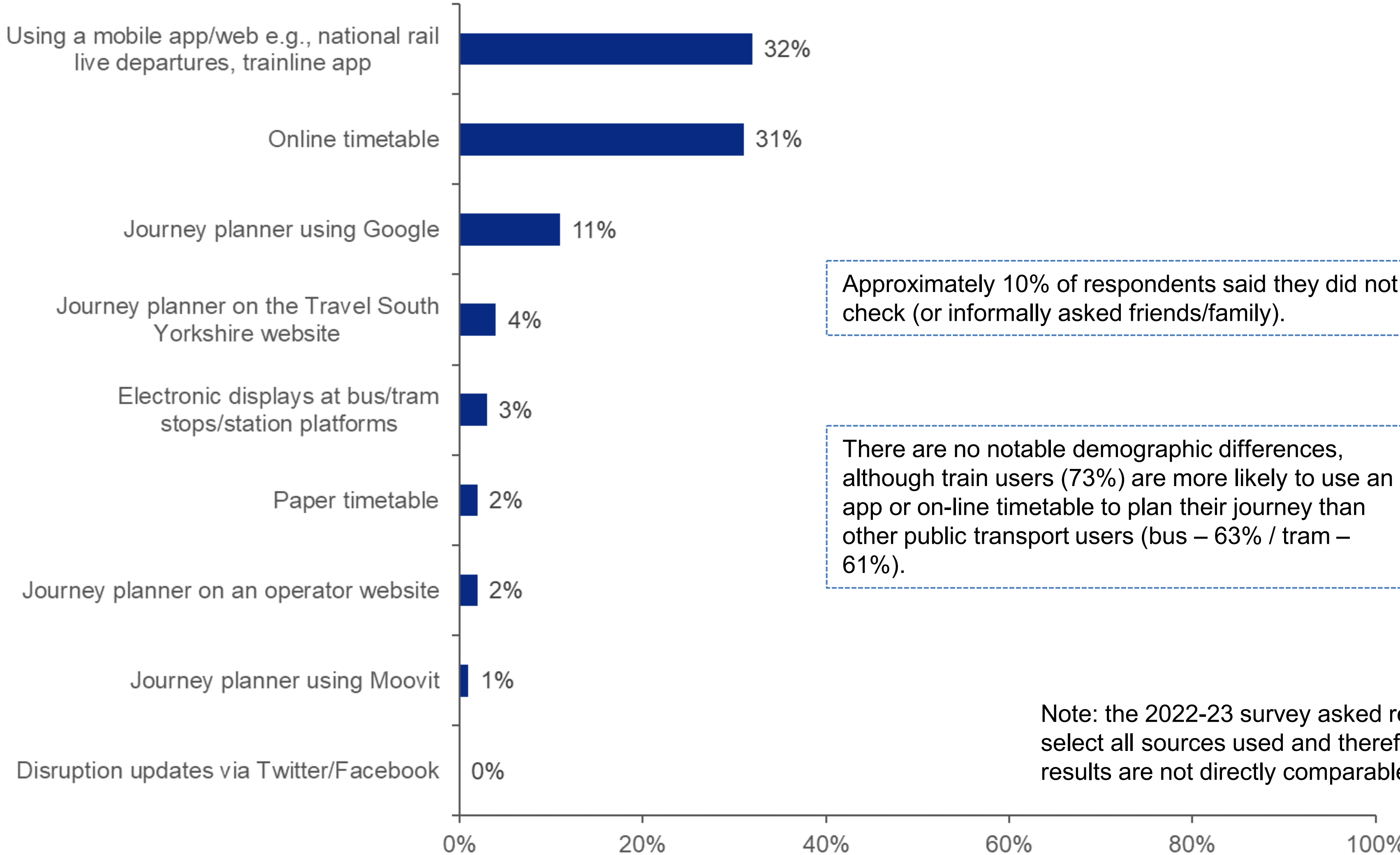
public perspectives

Almost two-thirds use an app or online timetable and 11% use Google journey planner to check for service information before leaving home, a similar order to the previous survey

What is the main source of information you use to check for service information before you leave home? N=932 (Public transport users only)



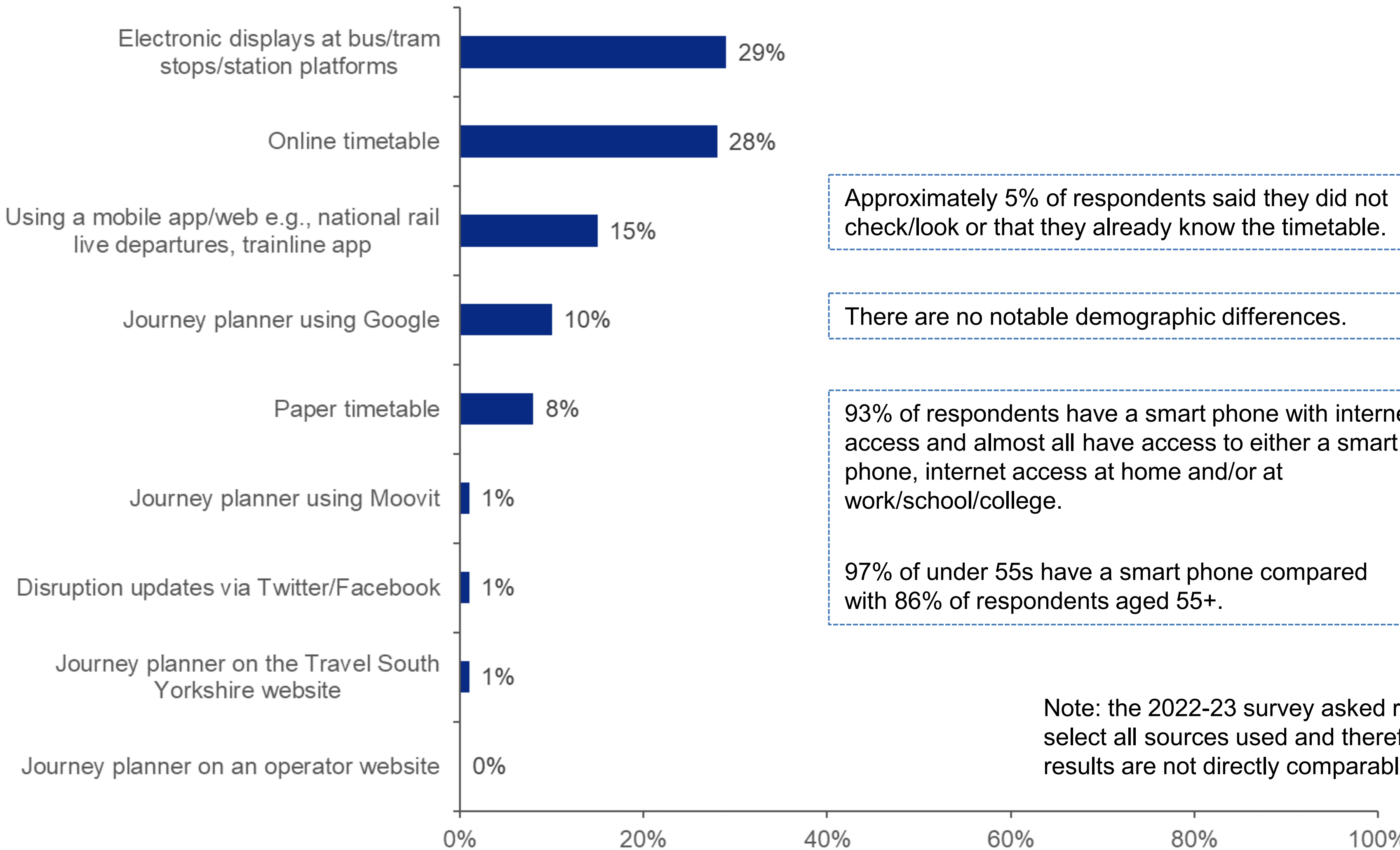
Approximately 10% of respondents said they did not check (or informally asked friends/family).

There are no notable demographic differences, although train users (73%) are more likely to use an app or on-line timetable to plan their journey than other public transport users (bus – 63% / tram – 61%).

Note: the 2022-23 survey asked respondents to select all sources used and therefore the detailed results are not directly comparable.

Over a quarter use electronic displays and a similar number use online timetables, with 15% using a mobile app, 10% Google journey planner and 8% paper timetables when at a stop/platform, a similar order to the previous survey

What is the main source of information you use to check for service information at the bus or tram stop/train platform? N=950 (Public Transport users only)



Approximately 5% of respondents said they did not check/look or that they already know the timetable.

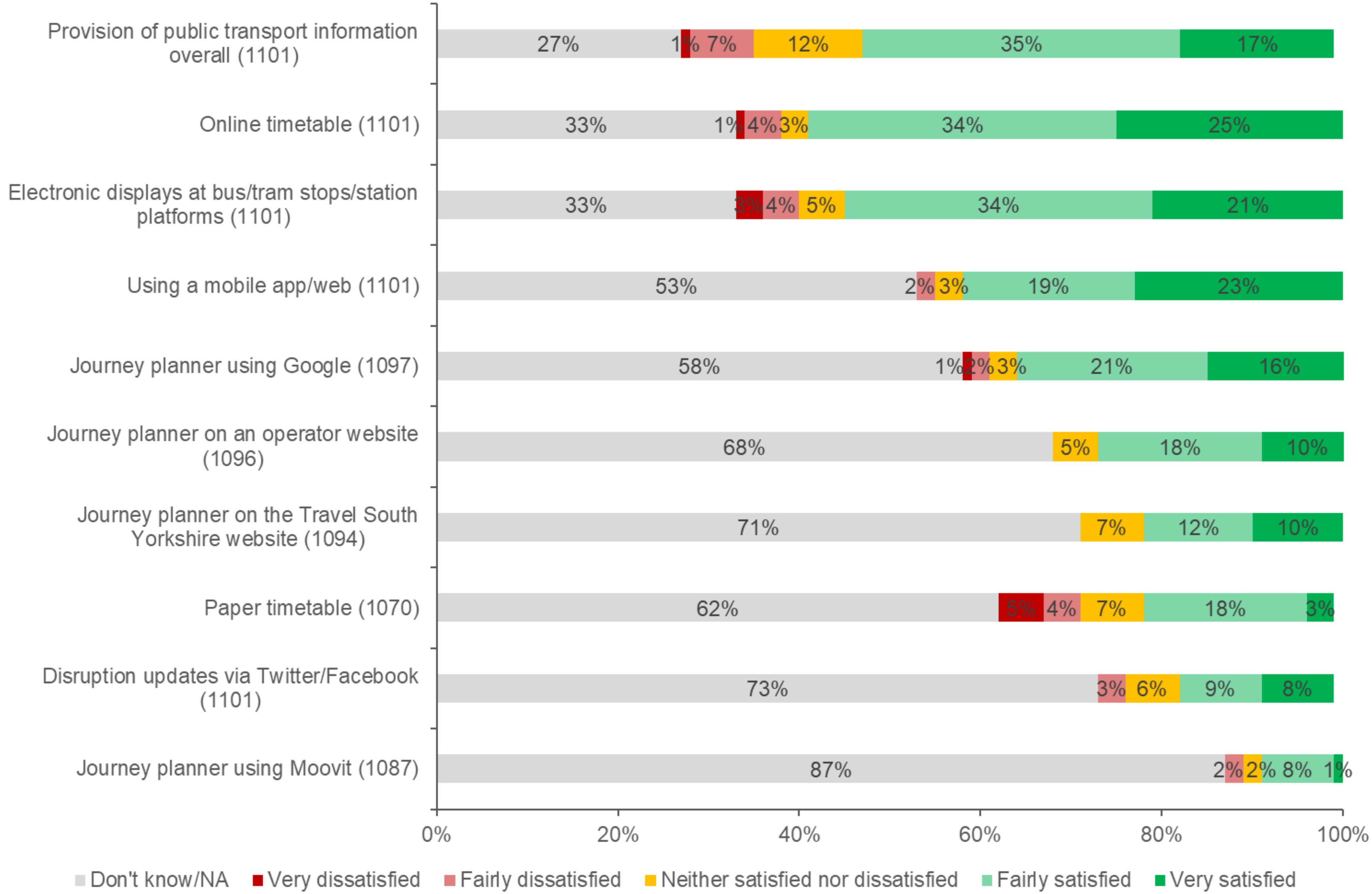
There are no notable demographic differences.

93% of respondents have a smart phone with internet access and almost all have access to either a smart phone, internet access at home and/or at work/school/college.

97% of under 55s have a smart phone compared with 86% of respondents aged 55+.

Note: the 2022-23 survey asked respondents to select all sources used and therefore the detailed results are not directly comparable.

Over half (52%) are satisfied with public transport information overall, with no notable demographic or transport mode differences



Question asked: Are you satisfied or dissatisfied with each of the following aspects of service information? Numbers in brackets are the number of respondents (Public transport users only).

Public transport facilities

Research
Evaluation
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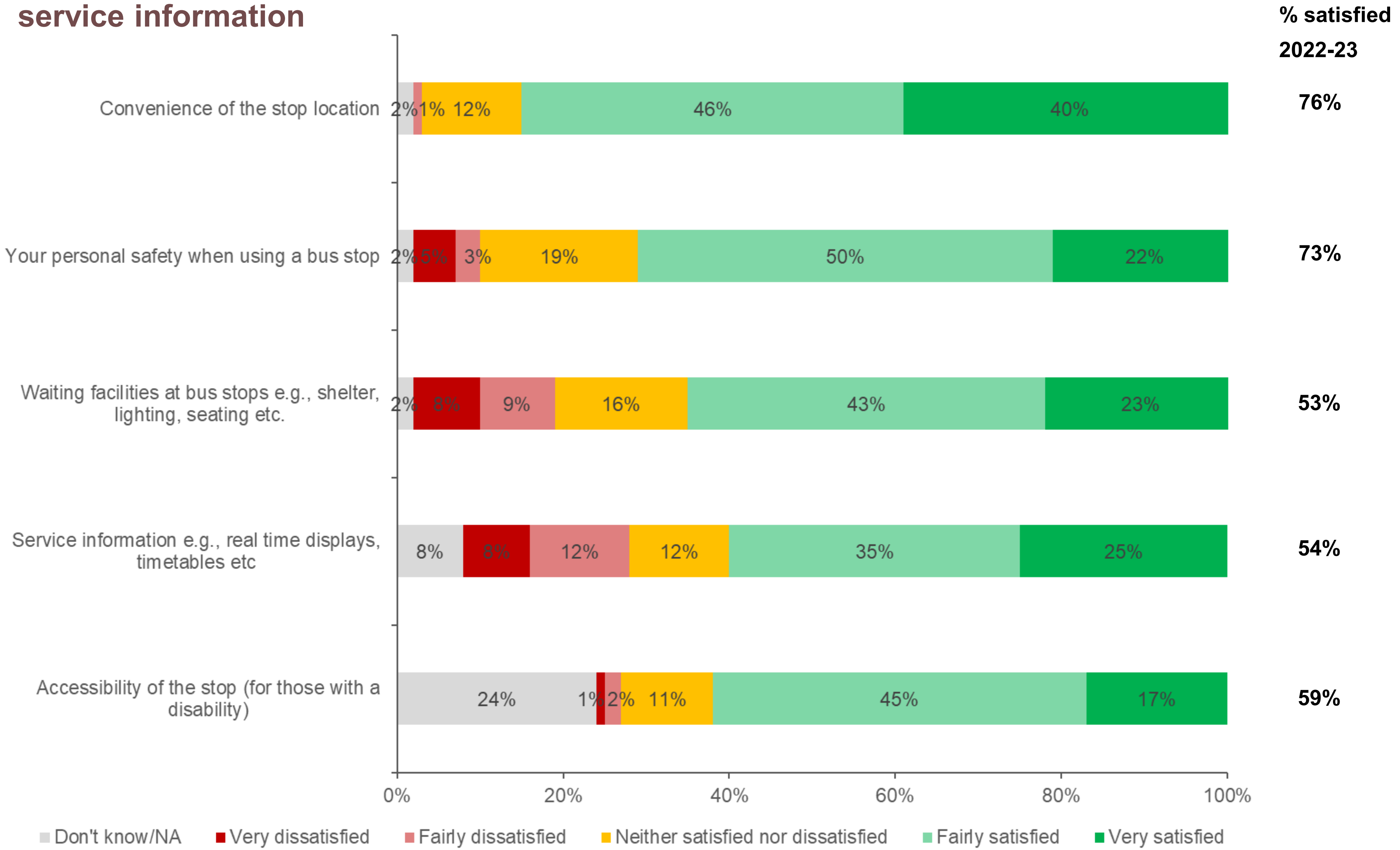
Strategy Development

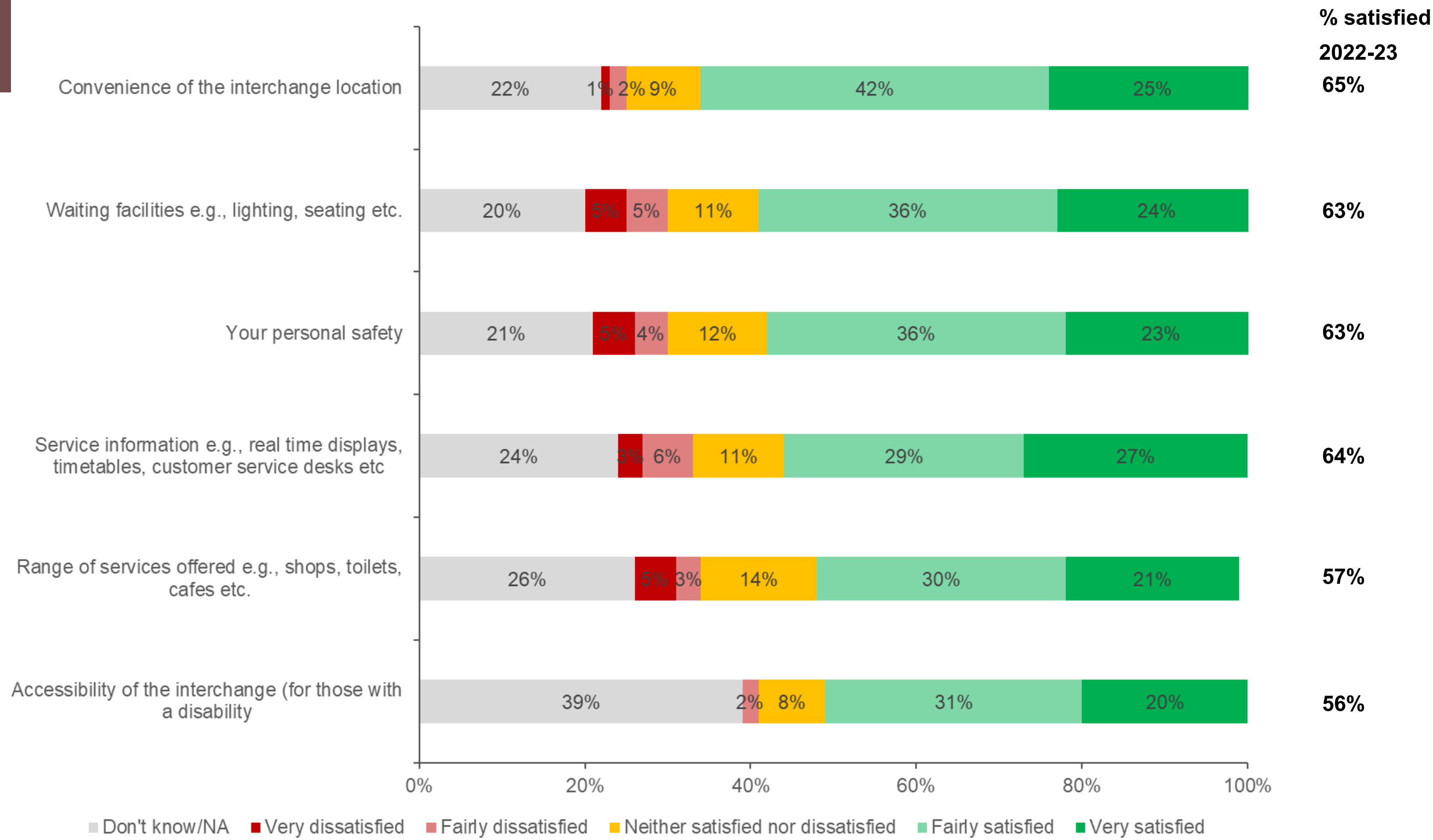
public perspectives

Most bus users are satisfied with facilities at bus stops, especially convenience, and results compare favourably to 2022-23, although there is scope to improve safety, waiting facilities and service information



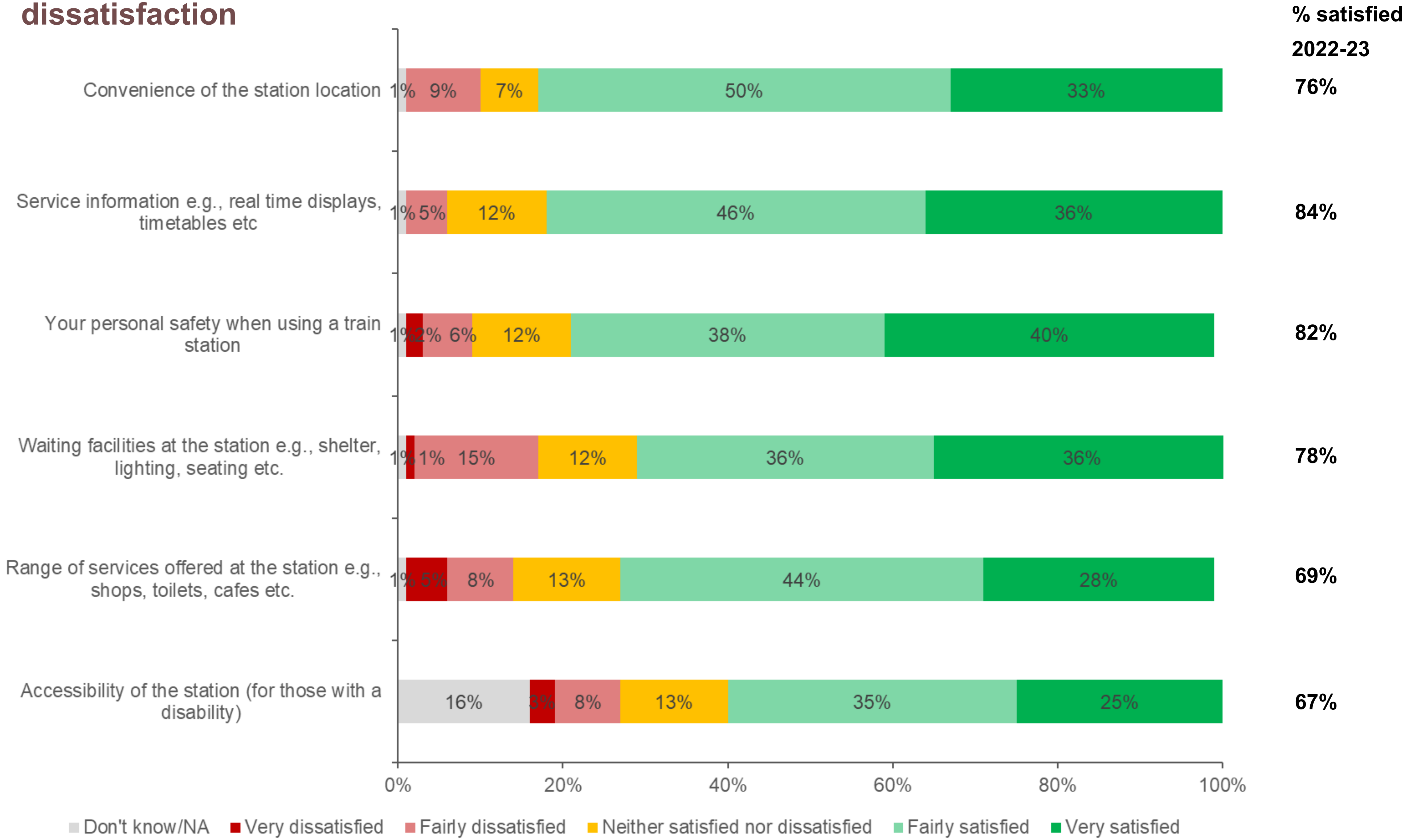
Question asked: Are you are satisfied or dissatisfied with each of the following aspects of bus stops? Numbers of respondents: 762 for each aspect (Bus users only).

Majority of public transport users are satisfied with facilities at bus stations and public transport interchanges (with low levels of dissatisfaction), and results are broadly similar to 2022-23



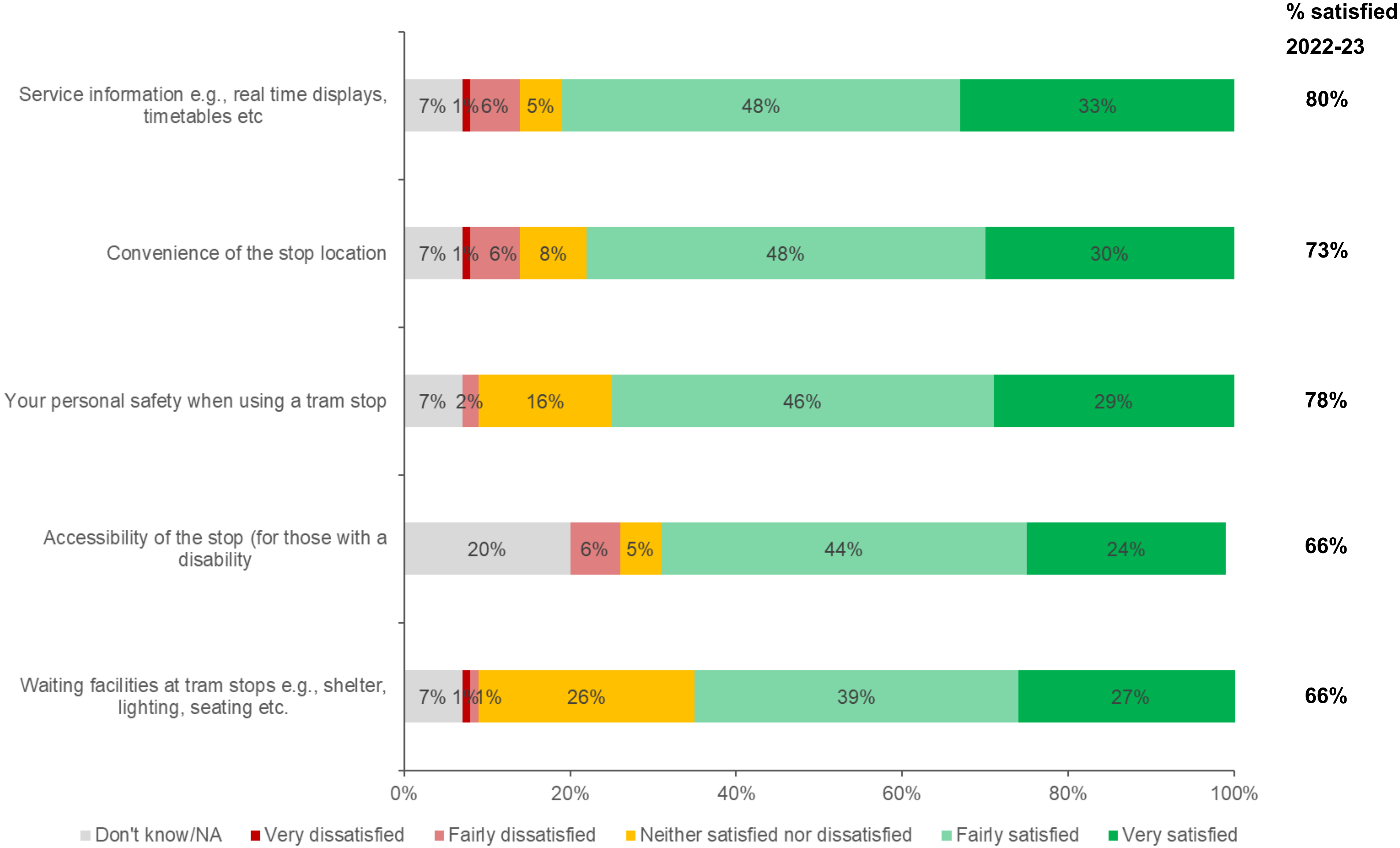
Question asked: Are you are satisfied or dissatisfied with the following aspects of bus stations and public transport interchanges? Numbers of respondents: 951 for each aspect (Public transport users only).

Most train users are satisfied with facilities at train stations, and results are broadly similar to 2022-23, although waiting facilities and range of services offered have relatively high levels of dissatisfaction



Question asked: Are you are satisfied or dissatisfied with the following aspects of train stations? Numbers of respondents: 514 for each aspect (Train users only).

Most tram users are satisfied with facilities at tram stops, and results are broadly similar to 2022-23



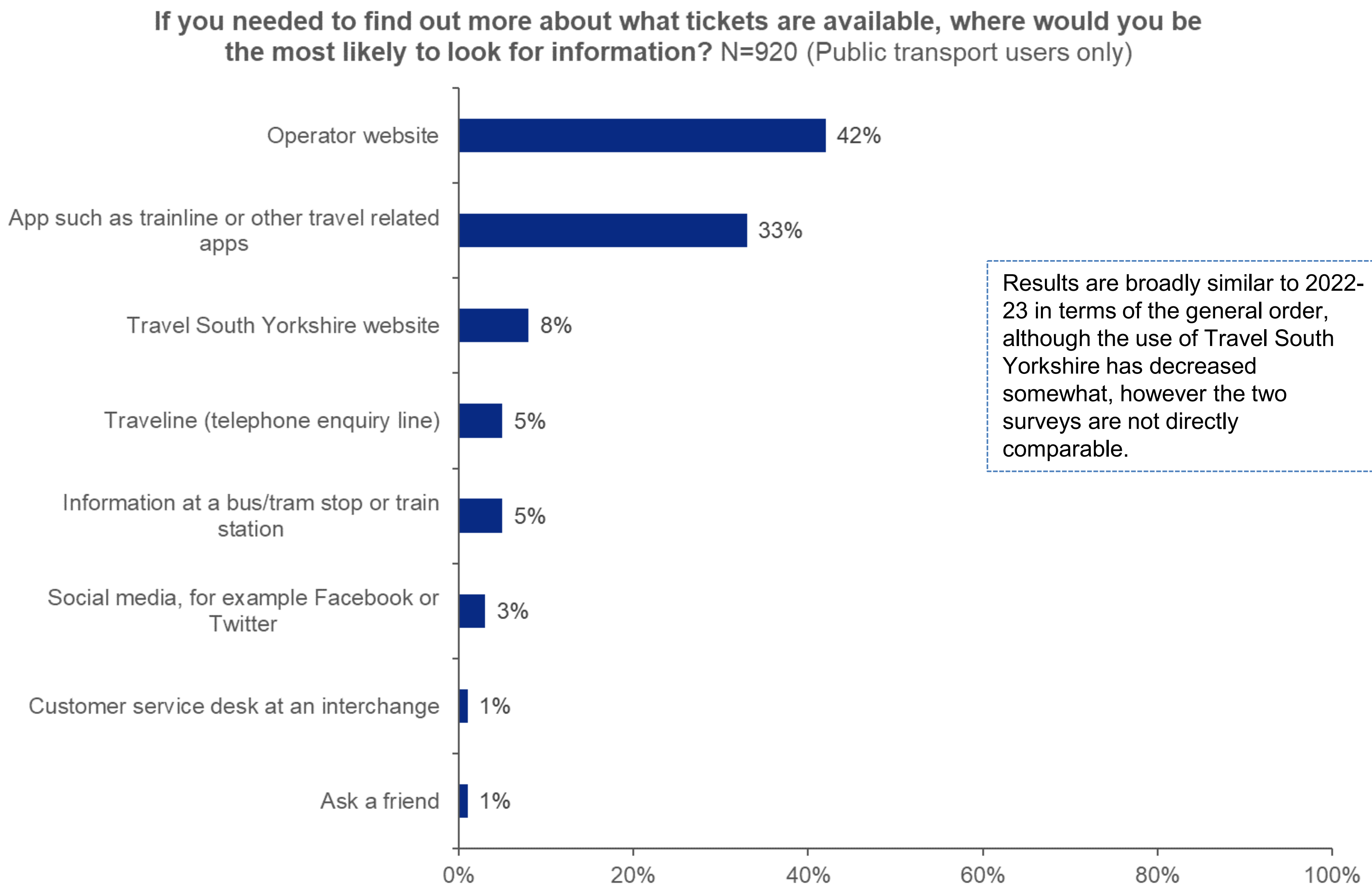
Question asked: Are you are satisfied or dissatisfied with the following aspects of tram stops? Numbers of respondents: 435 for each aspect (Tram users only).

Public transport tickets

Research
Evaluation
Community Engagement
Strategy Development

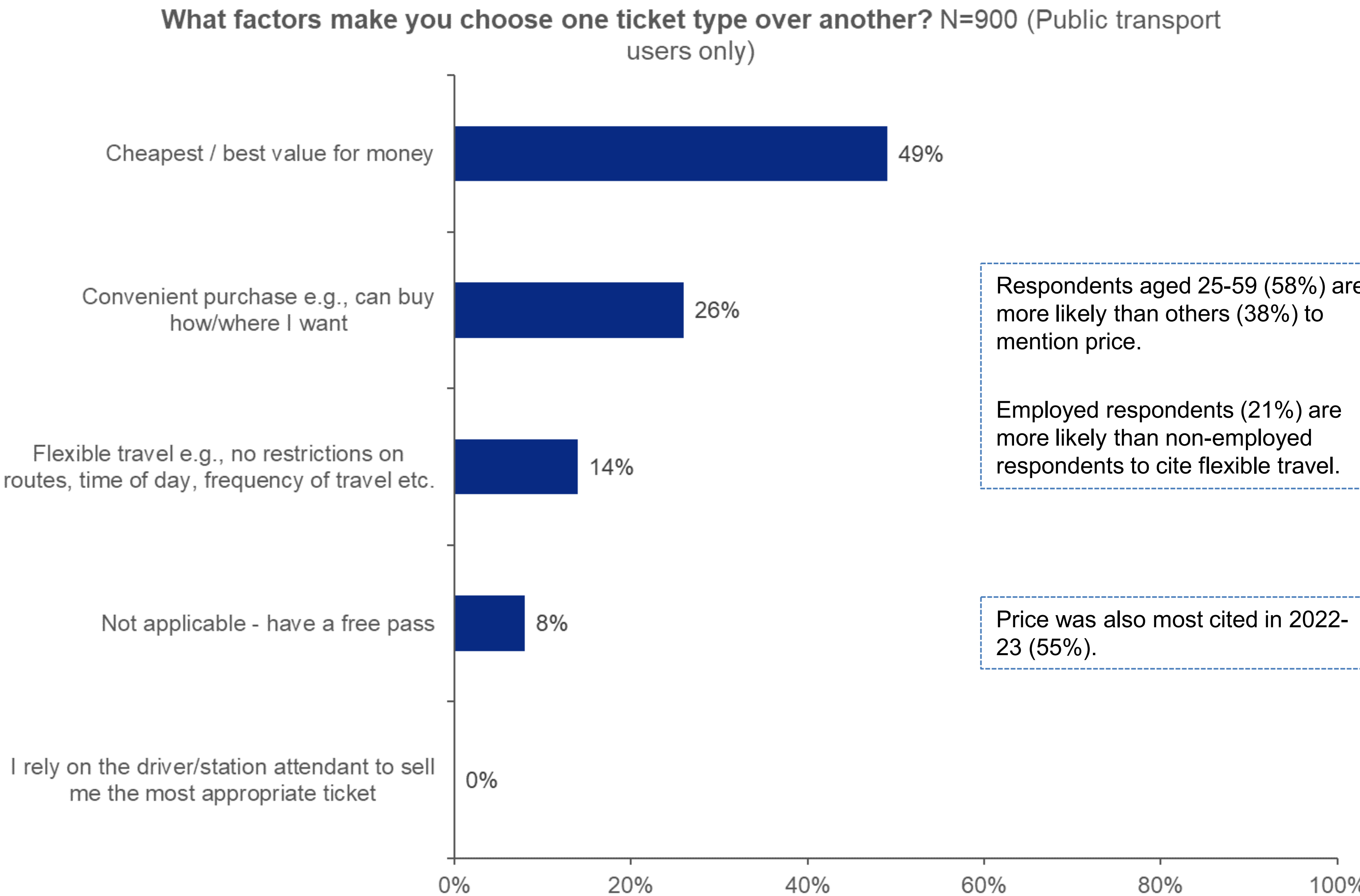
public perspectives

Public transport users will typically use the operator website or Apps such as the trainline or other travel related apps to find out about what tickets are available



Results are broadly similar to 2022-23 in terms of the general order, although the use of Travel South Yorkshire has decreased somewhat, however the two surveys are not directly comparable.

Price, followed by convenience and flexibility, is the main factor determining ticket type



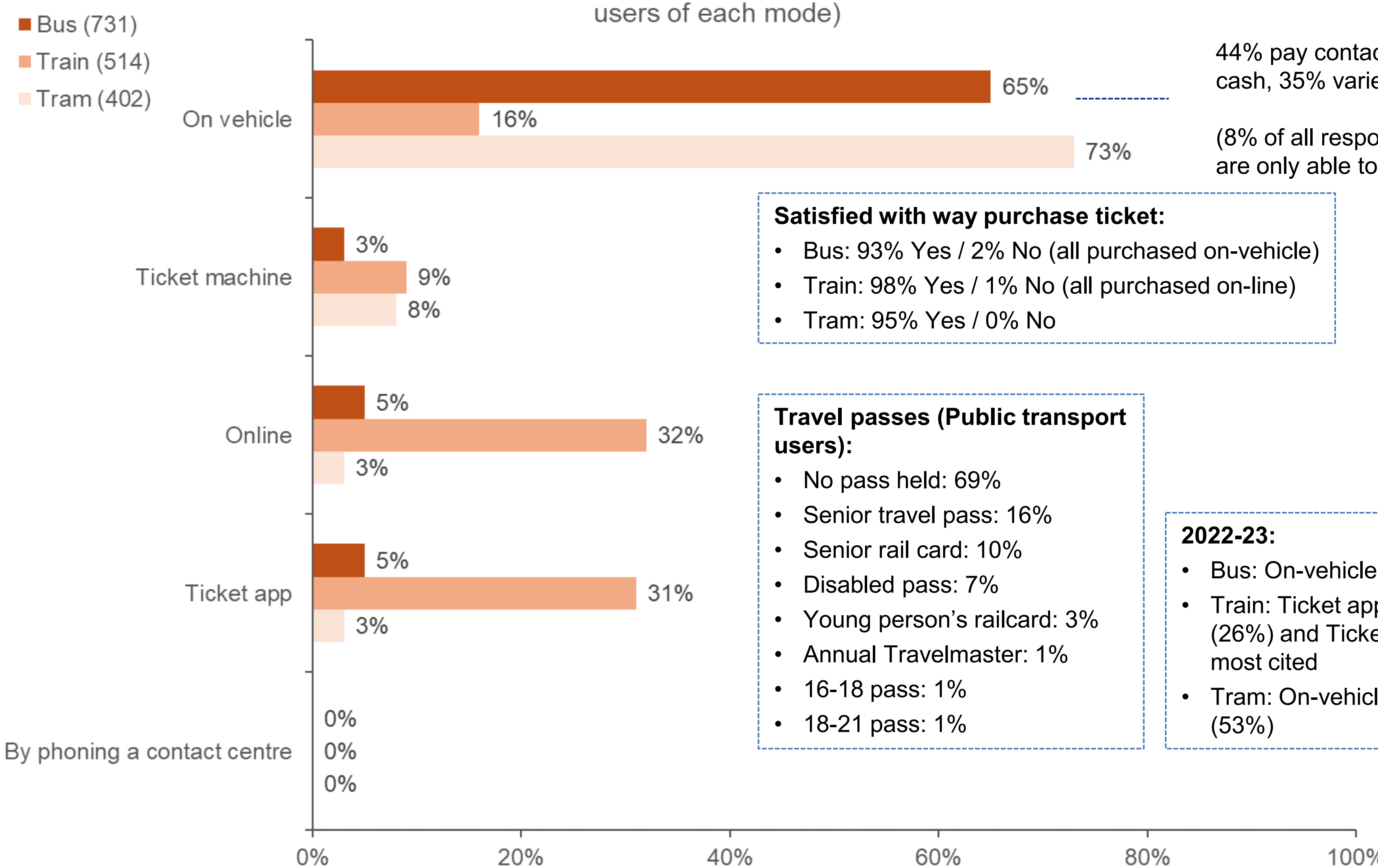
Respondents aged 25-59 (58%) are more likely than others (38%) to mention price.

Employed respondents (21%) are more likely than non-employed respondents to cite flexible travel.

Price was also most cited in 2022-23 (55%).

Bus and tram users mainly purchase tickets on-vehicle, while train users mainly purchase online or via a ticket app, with most happy with their method of purchase

Where do you usually buy your bus/train/tram tickets from? N=in brackets (only asked to users of each mode)



44% pay contactless, 17% by cash, 35% varies

(8% of all respondents said they are only able to pay by cash)

Satisfied with way purchase ticket:

- Bus: 93% Yes / 2% No (all purchased on-vehicle)
- Train: 98% Yes / 1% No (all purchased on-line)
- Tram: 95% Yes / 0% No

Travel passes (Public transport users):

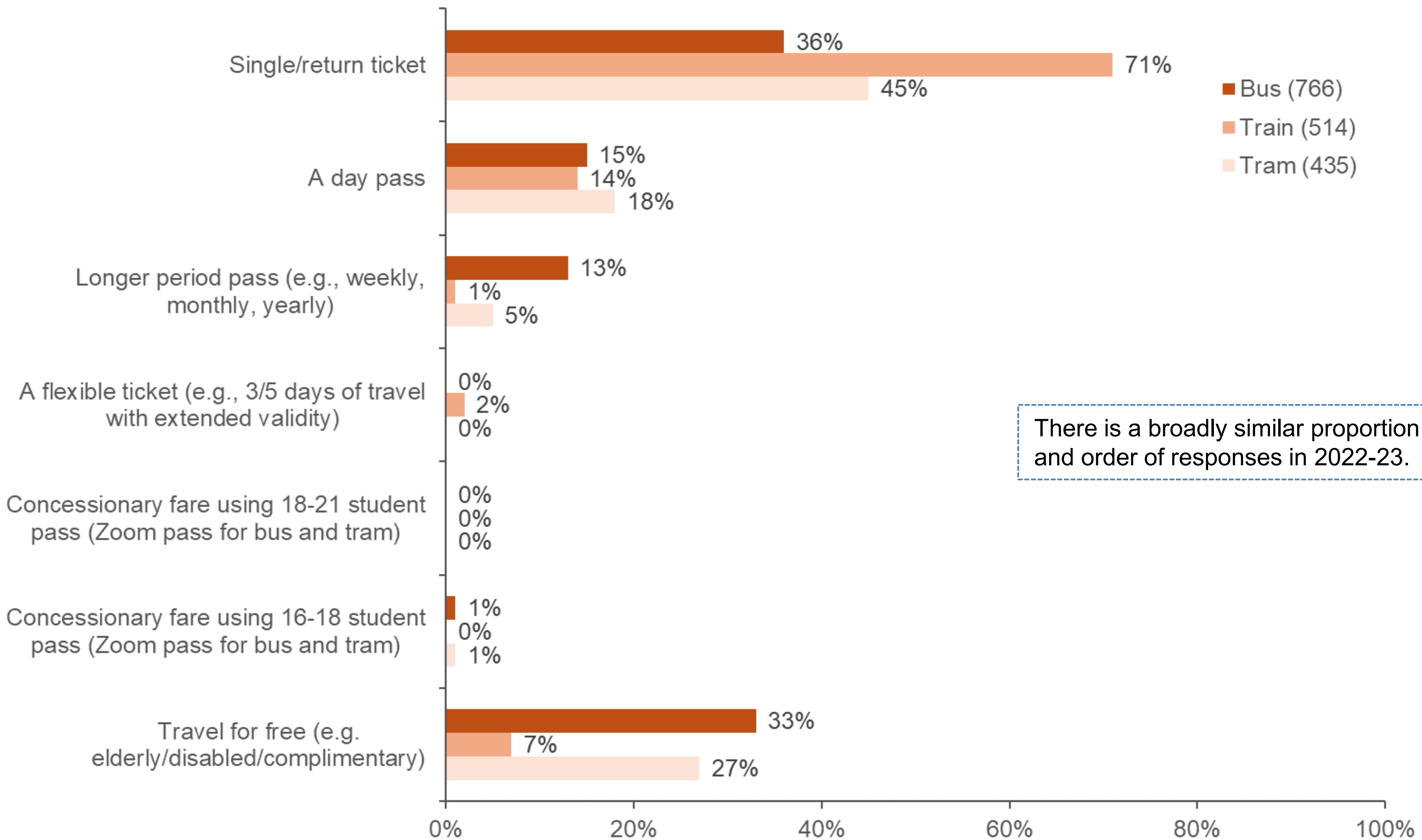
- No pass held: 69%
- Senior travel pass: 16%
- Senior rail card: 10%
- Disabled pass: 7%
- Young person's railcard: 3%
- Annual Travelmaster: 1%
- 16-18 pass: 1%
- 18-21 pass: 1%

2022-23:

- Bus: On-vehicle most cited (50%)
- Train: Ticket app (28%), Online (26%) and Ticket machine (22%) most cited
- Tram: On-vehicle most cited (53%)

The most commonly cited ticket type purchased in the last year is a single/return ticket, followed by a day pass and for bus users longer period passes, while notable proportions of bus and tram users travel for free

Thinking about travelling by bus/train/tram in the last year, which type of ticket have you used most often? N=in brackets (only asked to users of each mode)

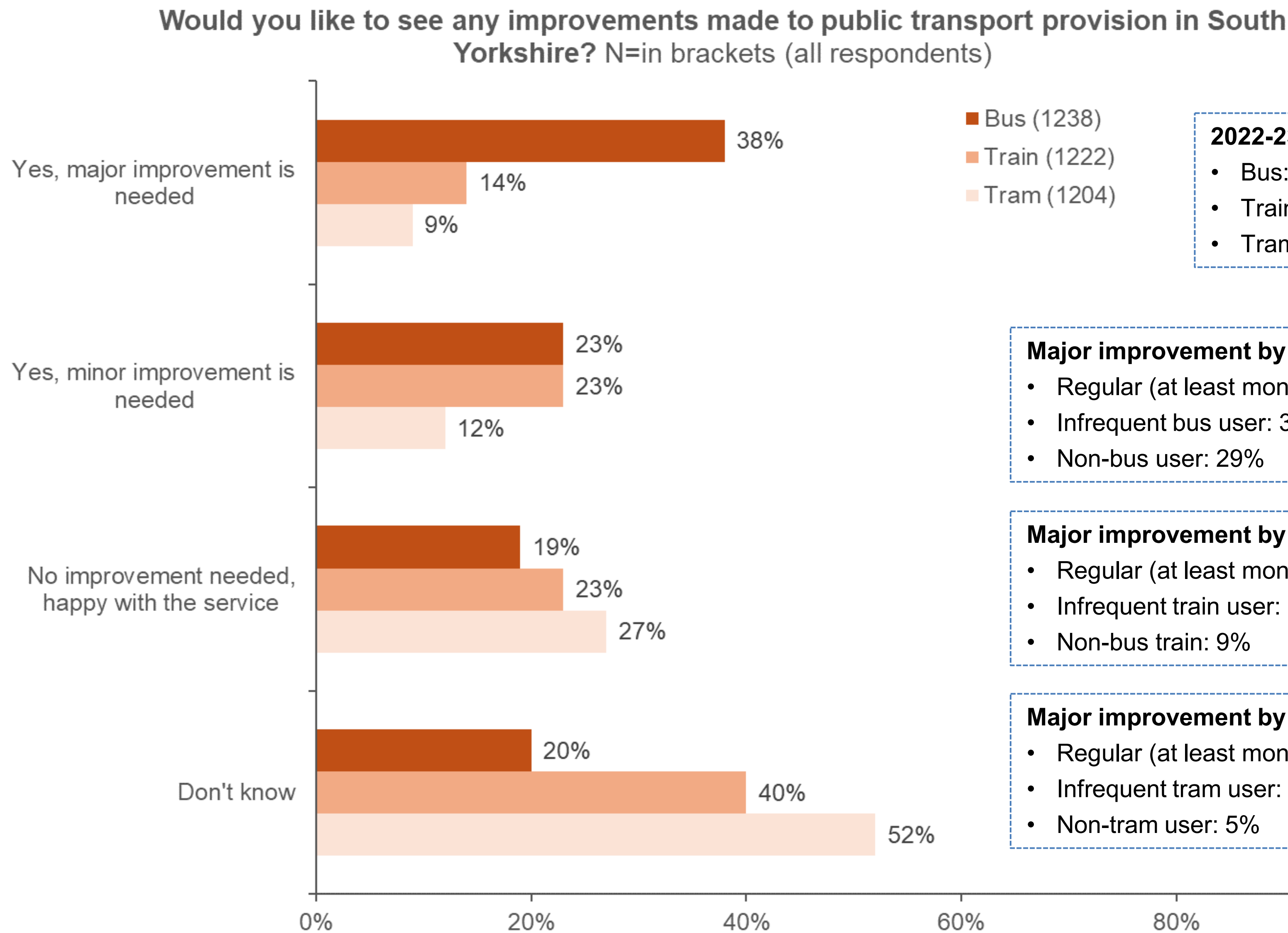


There is a broadly similar proportion and order of responses in 2022-23.

Public transport improvements

Research
Evaluation
Community Engagement
Strategy Development

Over a third of respondents would like major improvements to the bus service, while 14% want major improvements to train services and 9% major improvements to trams



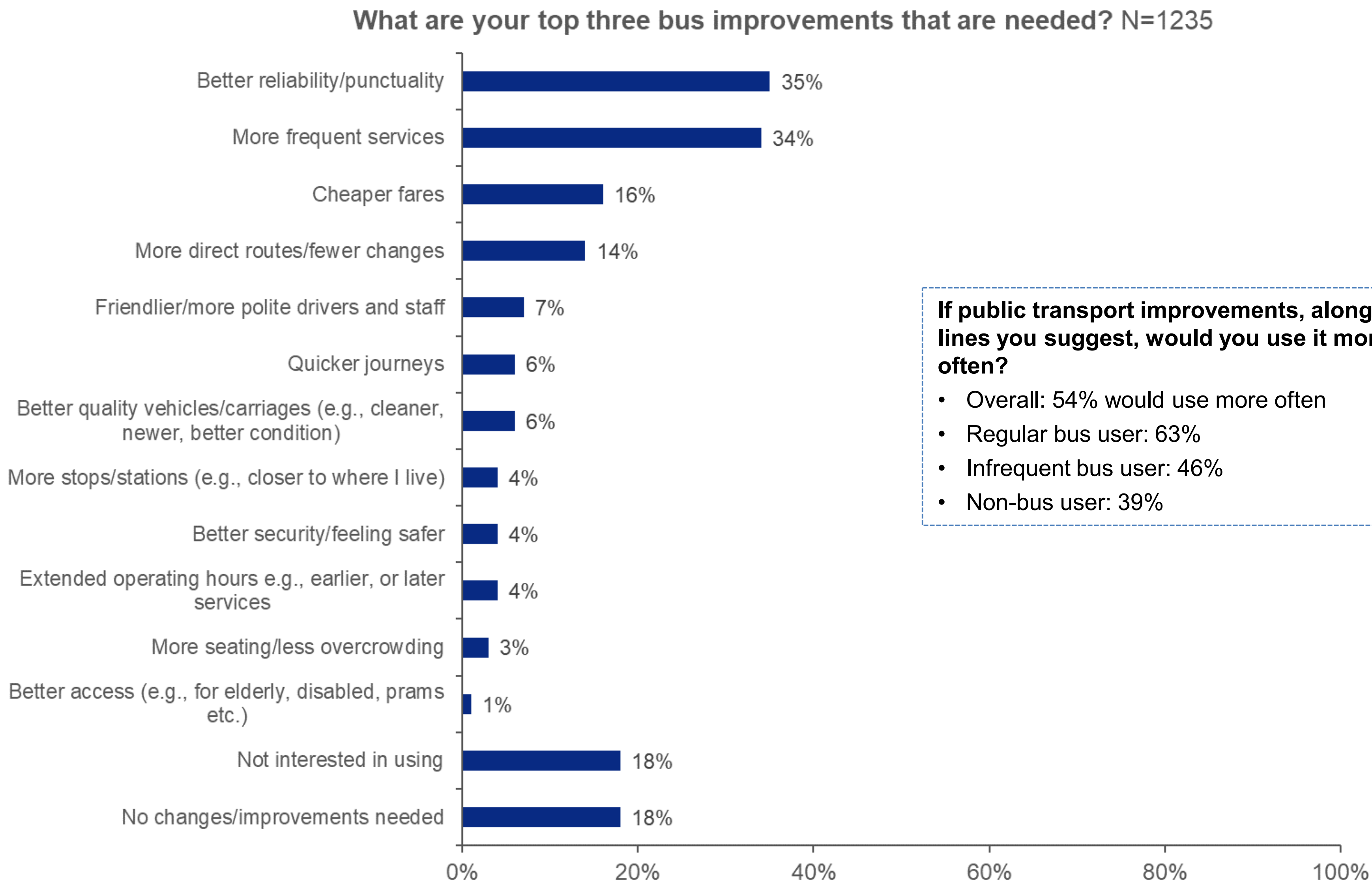
2022-23 (Major improvement):
- Bus: 41%
- Train: 24%
- Tram: 12%

Major improvement by bus use:
- Regular (at least monthly) bus user: 44%
- Infrequent bus user: 32%
- Non-bus user: 29%

Major improvement by train use:
- Regular (at least monthly) train user: 18%
- Infrequent train user: 14%
- Non-bus train: 9%

Major improvement by tram use:
- Regular (at least monthly) tram user: 16%
- Infrequent tram user: 10%
- Non-tram user: 5%

Over a third cited better reliability/punctuality or more frequent bus services, 16% mentioned cheaper fares and 14% more direct routes/fewer changes, similarly top cited improvements to those in 2022-23

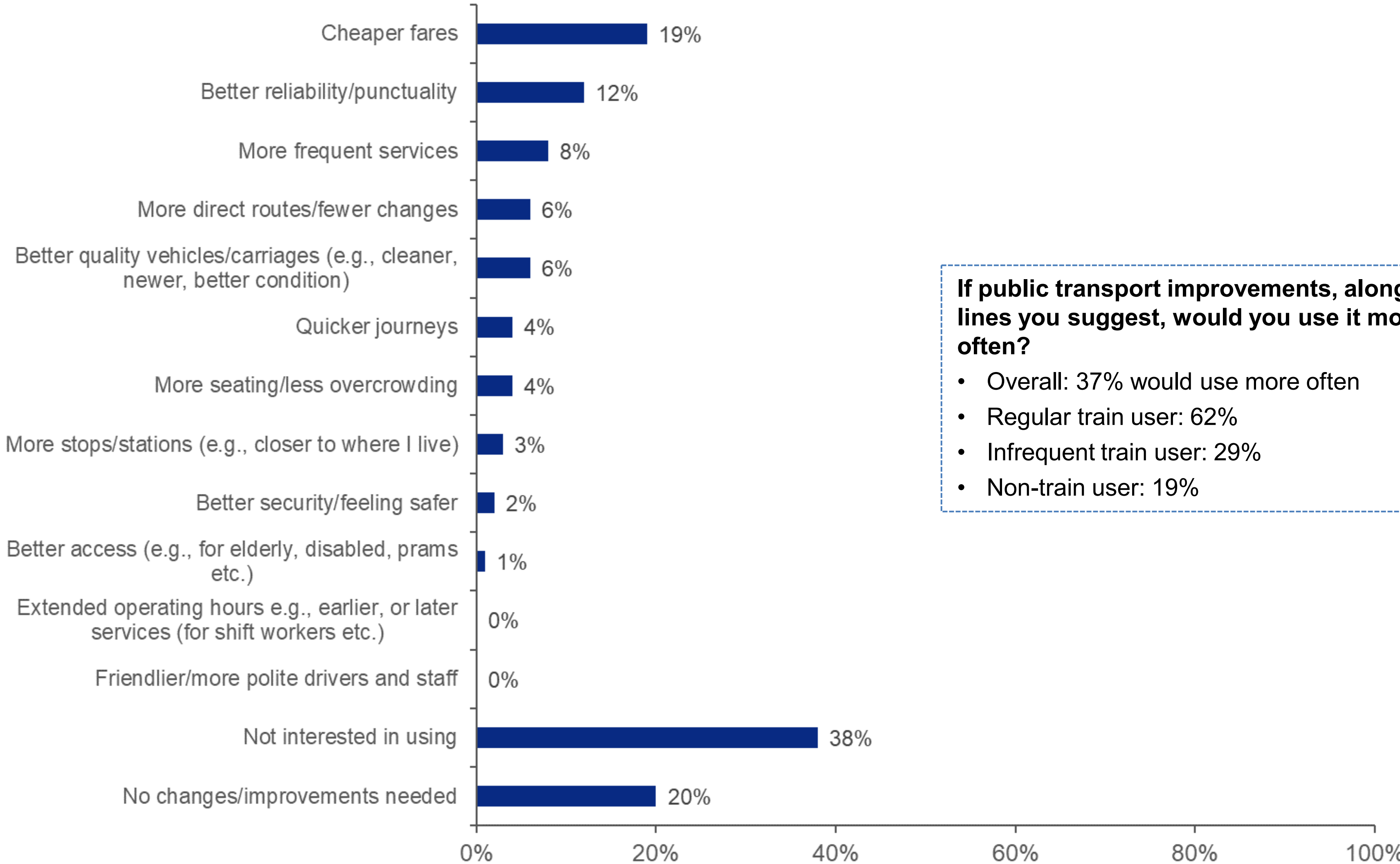


If public transport improvements, along the lines you suggest, would you use it more often?

- Overall: 54% would use more often
- Regular bus user: 63%
- Infrequent bus user: 46%
- Non-bus user: 39%

Almost a fifth cited cheaper train fares, 12% better reliability/punctuality and 8% more frequent services, similarly top cited improvements to those in 2022-23

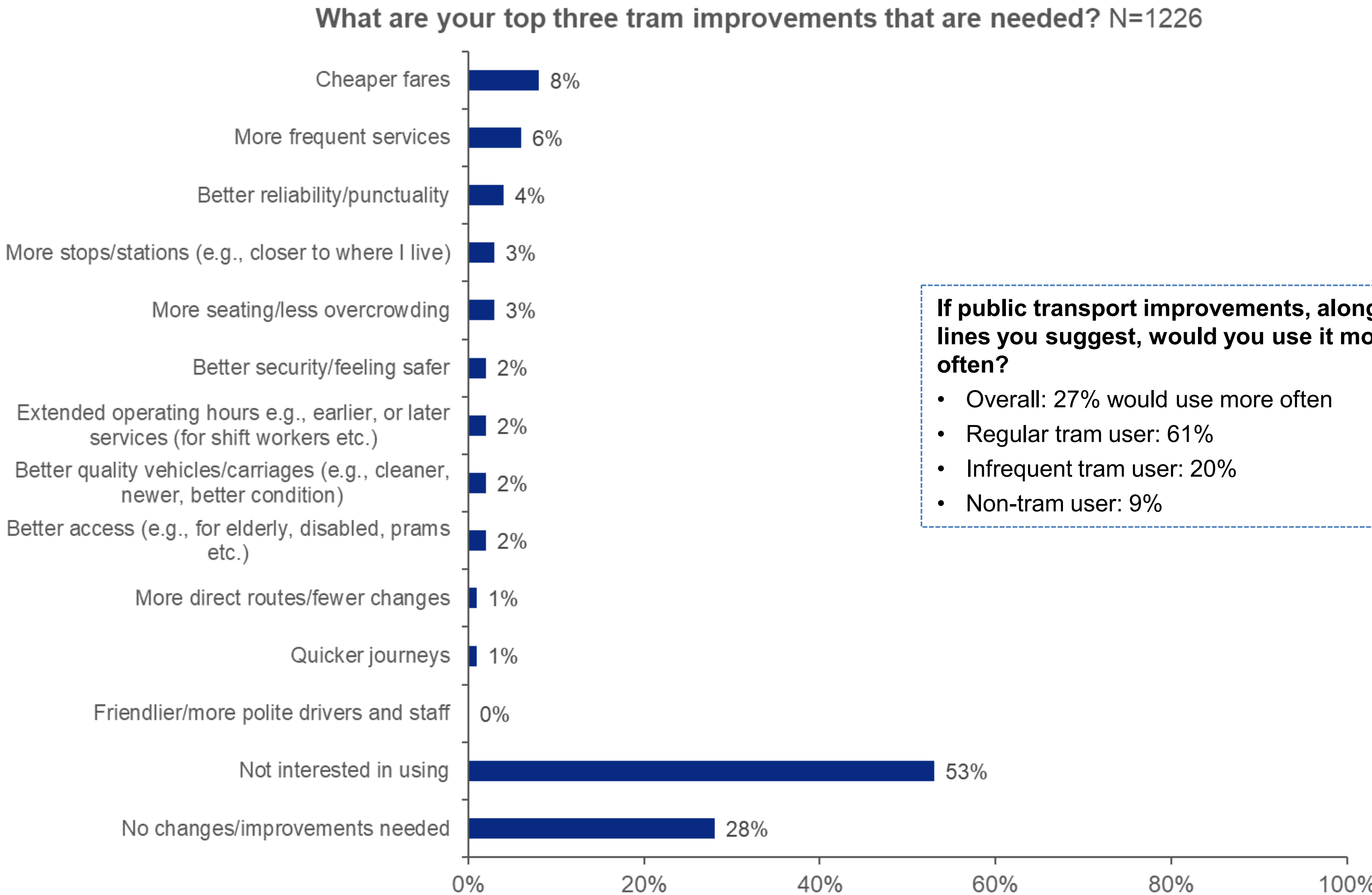
What are your top three train improvements that are needed? N=1234



If public transport improvements, along the lines you suggest, would you use it more often?

- Overall: 37% would use more often
- Regular train user: 62%
- Infrequent train user: 29%
- Non-train user: 19%

Half said they are not interested in using the tram and over a quarter said improvement are not needed, while cheaper fares, more frequent services and better reliability/punctuality were the top cited improvements (similar to 2022-23)



If public transport improvements, along the lines you suggest, would you use it more often?

- Overall: 27% would use more often
- Regular tram user: 61%
- Infrequent tram user: 20%
- Non-tram user: 9%