



Public Perceptions of Transport Survey Summary

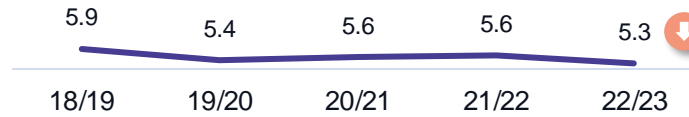
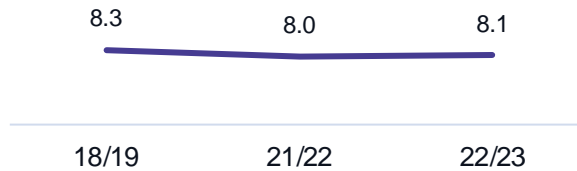
Research & Intelligence Team, June 2023

Satisfaction with local bus and rail services falls, whilst affordability increases

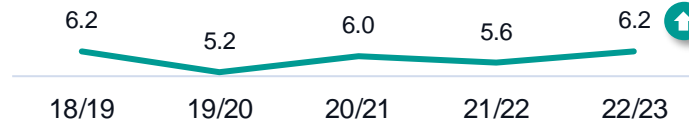
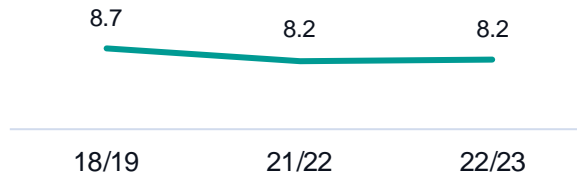
Importance to residents of ...

Satisfaction of residents with ...

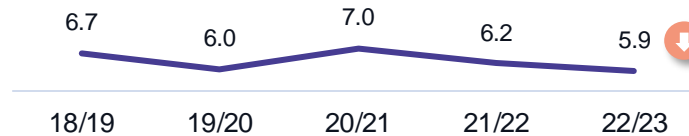
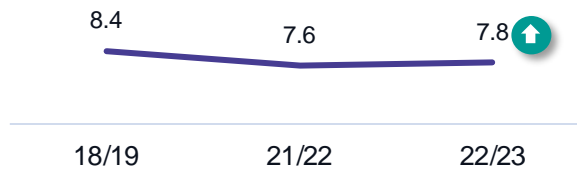
Affordability of motoring



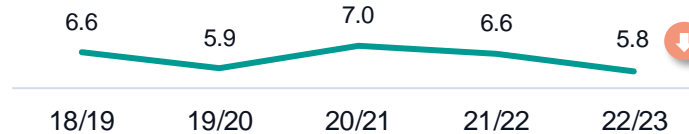
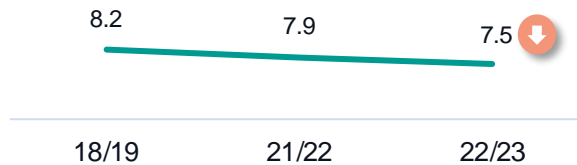
Affordability of public transport¹



Local bus services^{1,2}



Local train services^{1,2}



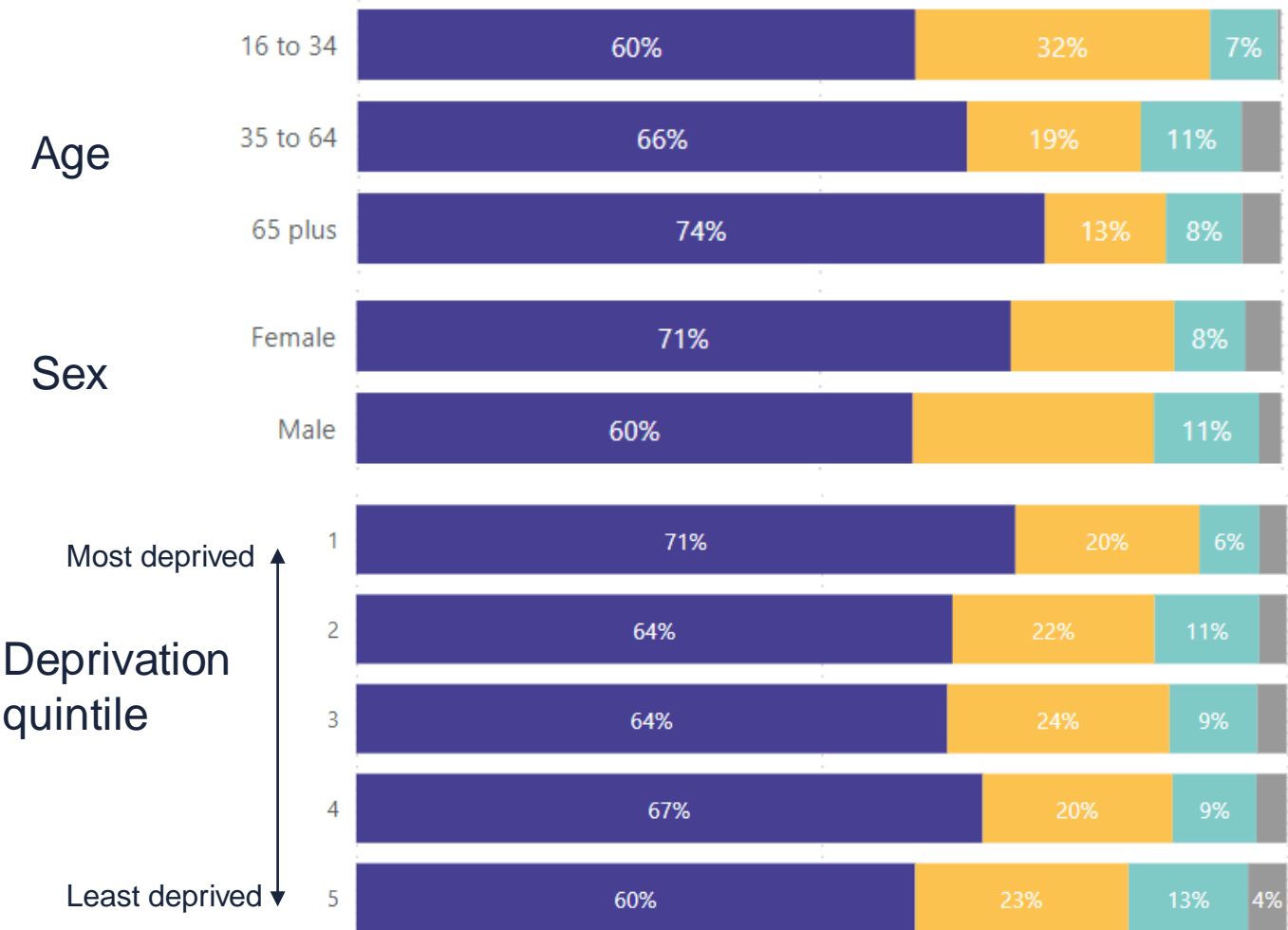
Significant difference compared to previous wave

- The importance of local train services has fallen since the pandemic and satisfaction is at a 5-year low.
- The importance of local bus services have rebounded slightly, but satisfaction has fallen further; a statistically *significant* decline since last year.
- Affordability of motoring has fallen whilst the affordability of public transport has increased back to pre-pandemic levels. This improvement in satisfaction may have been aided by the recent Mayor's Fares initiative which limits a single bus fare to £2 and daily fares to £4.50.
- Satisfaction with the affordability of public transport is 6.9 amongst residents who use the bus at least once a week, up from 5.8 last year.

Source: Question B1: Please say how important each of these is to your local area on a scale of 1 (not important) to 10 (very important) and question B2: Please say how satisfied you are on a scale of 1 (very dissatisfied) to 10 (very satisfied). Base: all respondents, base sizes vary as they are based on valid responses only. 1.Transport Strategy indicator, 2. State of the Region indicator.

Importance of local bus service varies by demographic group

Importance of local bus services ● Important ● Neither ● Not important ● Don't know



Self-reported importance of local bus services varies by demographic group. The following groups reported higher levels of importance for local bus service:

- Females
- Residents aged over 65
- Ethnic minorities
- Residents living in the most deprived neighbourhoods
- Residents in full time education
- Regular bus users (defined as those who use the bus at least once a week)

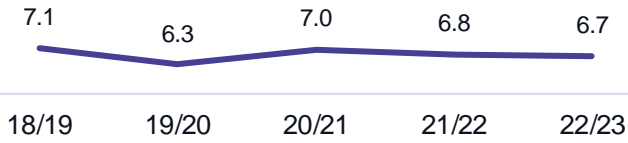
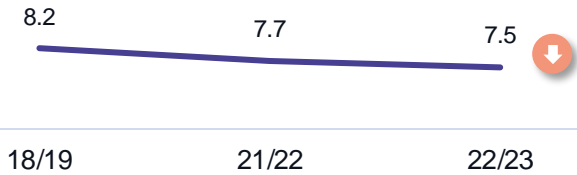
Source: Question B1: Please say how important each of these is to your local area on a scale of 1 (not important) to 10 (very important).

Satisfaction with local bus and rail services falls, whilst affordability increases

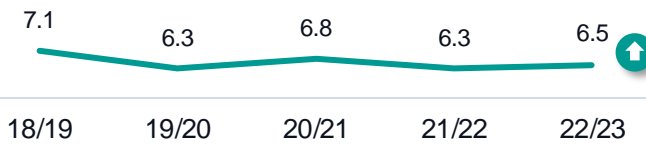
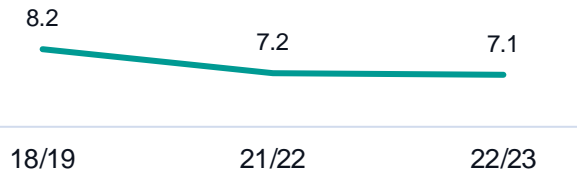
Importance to residents of ...

Satisfaction of residents with ...

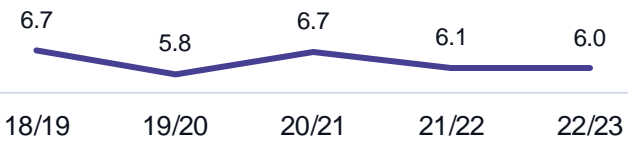
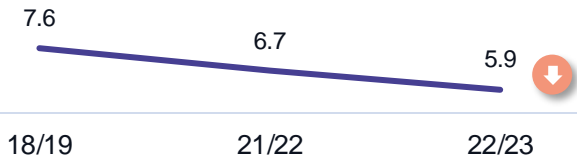
The quality of your nearest rail station¹



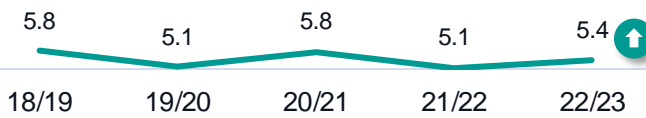
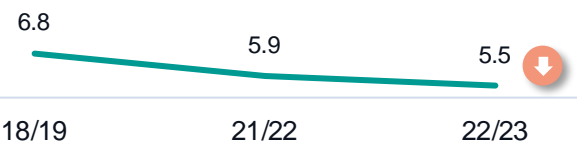
The quality of your nearest bus station¹





Community Transport¹



Provision of cycle routes & facilities¹

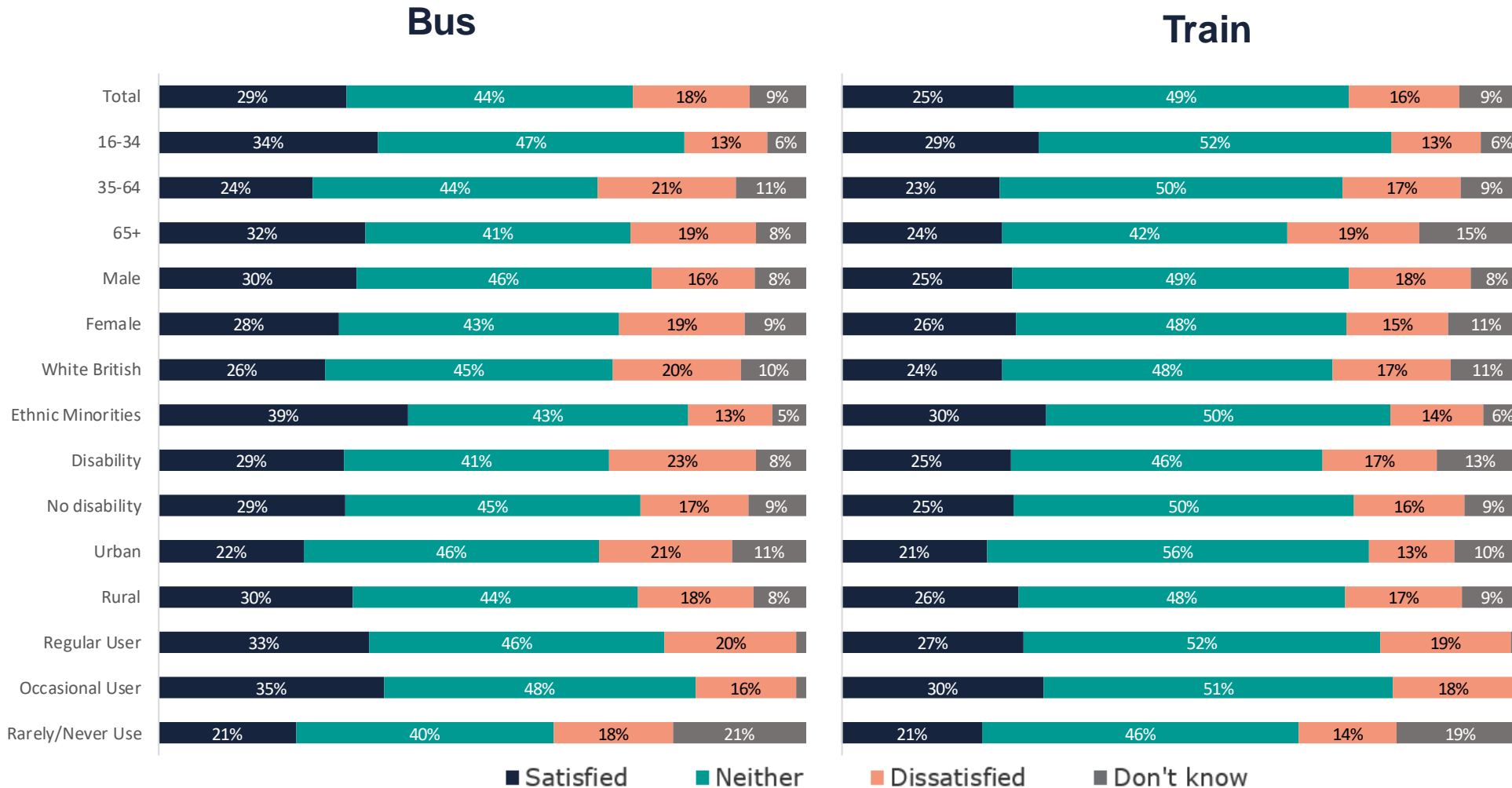




 Significant difference compared to previous wave

- The importance of the quality of local rail station has fallen whilst satisfaction is stable.
- Satisfaction with the quality of resident's local bus station has increased from last year, but is lower than pre-pandemic levels.
- The importance of community transport has fallen significantly whilst satisfaction is stable.
- The importance of the provision of cycling infrastructure has fallen whilst satisfaction has rebounded, but remains lower than pre-pandemic levels.

Source: Question B1: Please say how important each of these is to your local area on a scale of 1 (not important) to 10 (very important) and **question B2:** Please say how satisfied you are on a scale of 1 (very dissatisfied) to 10 (very satisfied). **Base:** all respondents, base sizes vary as they are based on valid responses only. 1.Transport Strategy indicator

Satisfaction with local bus services is higher than with local train services



- Satisfaction with local bus services is higher than with local train services
- Satisfaction is higher amongst younger people, those from ethnic minority backgrounds and those living in rural areas

Source: Question B2: Please say how satisfied you are on a scale of 1 (very dissatisfied) to 10 (very satisfied). 1-3 has been interpreted as dissatisfied, 4-7 as neither and 8-10 as satisfied
 Base: all respondents, base sizes vary as they are based on valid responses only.

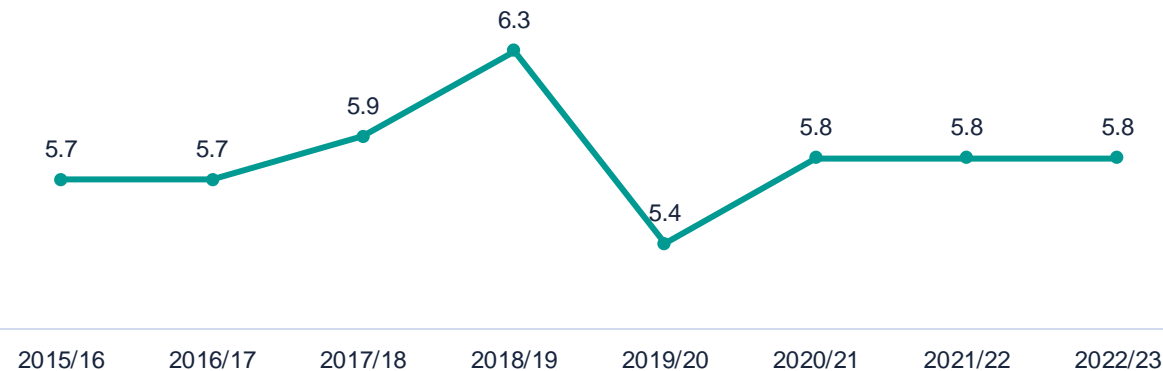
Overall satisfaction with transport infrastructure

The West Yorkshire Transport Strategy 2040 set a target to increase overall satisfaction with transport infrastructure to 7 of out 10 by 2027, from a baseline of 5.7 out of 10 in 2016. The last three years of data shows no change in overall satisfaction with transport infrastructure.

Overall satisfaction with transport infrastructure is a composite measure weighted by perceptions of importance. It includes:

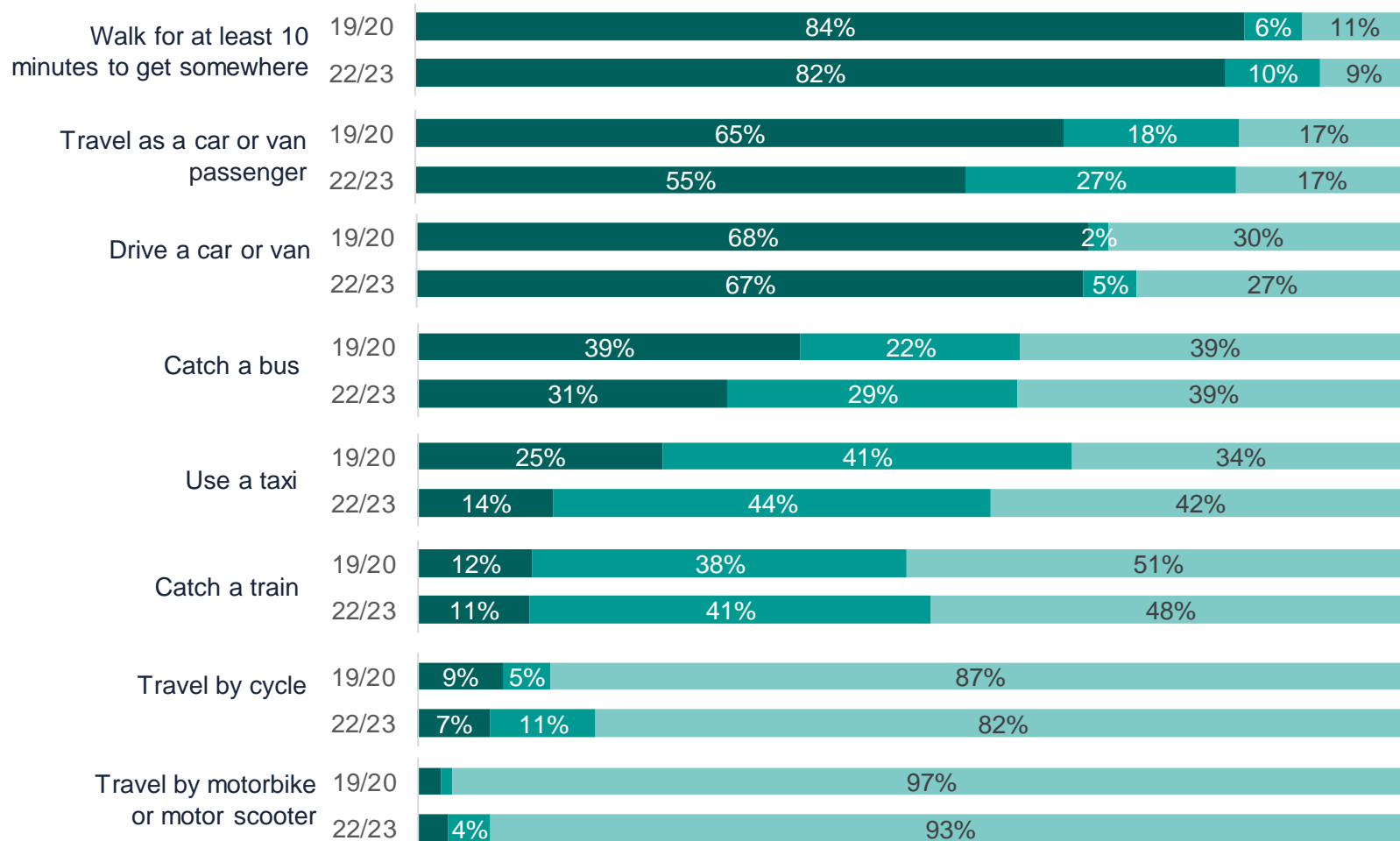
- Condition of pavements and footpaths
- Condition of roads
- Quality of repair to damaged roads and pavements
- Speed of repair to damaged roads and pavements
- Quality of street lighting
- Speed of repair of street lighting
- Keeping road gullies and drains clear and working
- Winter gritting and snow clearing
- Provision of cycling routes and facilities

Satisfaction with highway infrastructure^{1,2}



Source: **Question B1:** Please say how important each of these is to your local area on a scale of 1 (not important) to 10 (very important) and **question B2:** Please say how satisfied you are on a scale of 1 (very dissatisfied) to 10 (very satisfied). **Base:** all respondents, base sizes vary as they are based on valid responses only. 1.Transport Strategy indicator 2. State of the Region indicator.

The share of people who use bus regularly (at least weekly) remains lower than pre pandemic levels



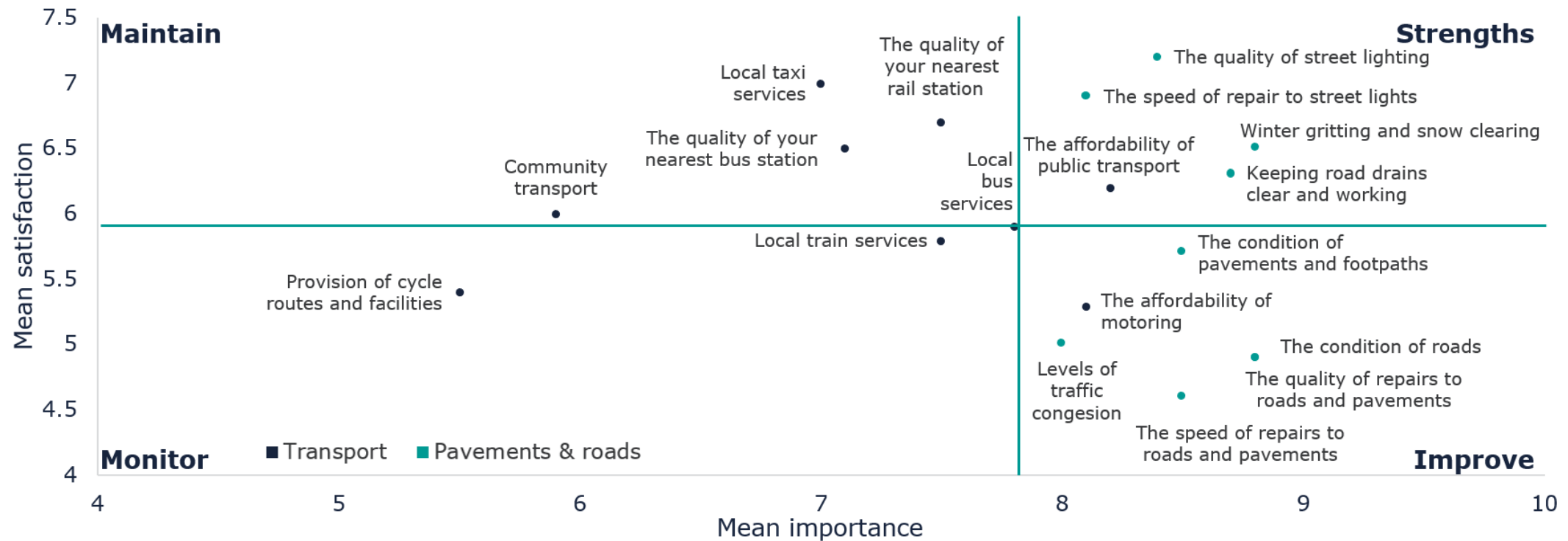
- The proportion of residents who regularly drive has fallen since last year but remains higher than before the pandemic with over two thirds of residents driving a car regularly.
- The proportion of residents who catch a bus regularly is lower than levels before the pandemic with less than one third of residents catching a bus regularly.

■ Regularly - at least once per week
■ Occasionally - less than once per week by at least once every 3 months
■ Rarely/Never - less than every 3 months or never

Source: Question C7: Thinking about how you travel in West Yorkshire, including the West Yorkshire part of cross-boundary journeys, how often do you...?
Base: C7 all respondents (2022/23 n=1,808, 2019/20 n=1,825)

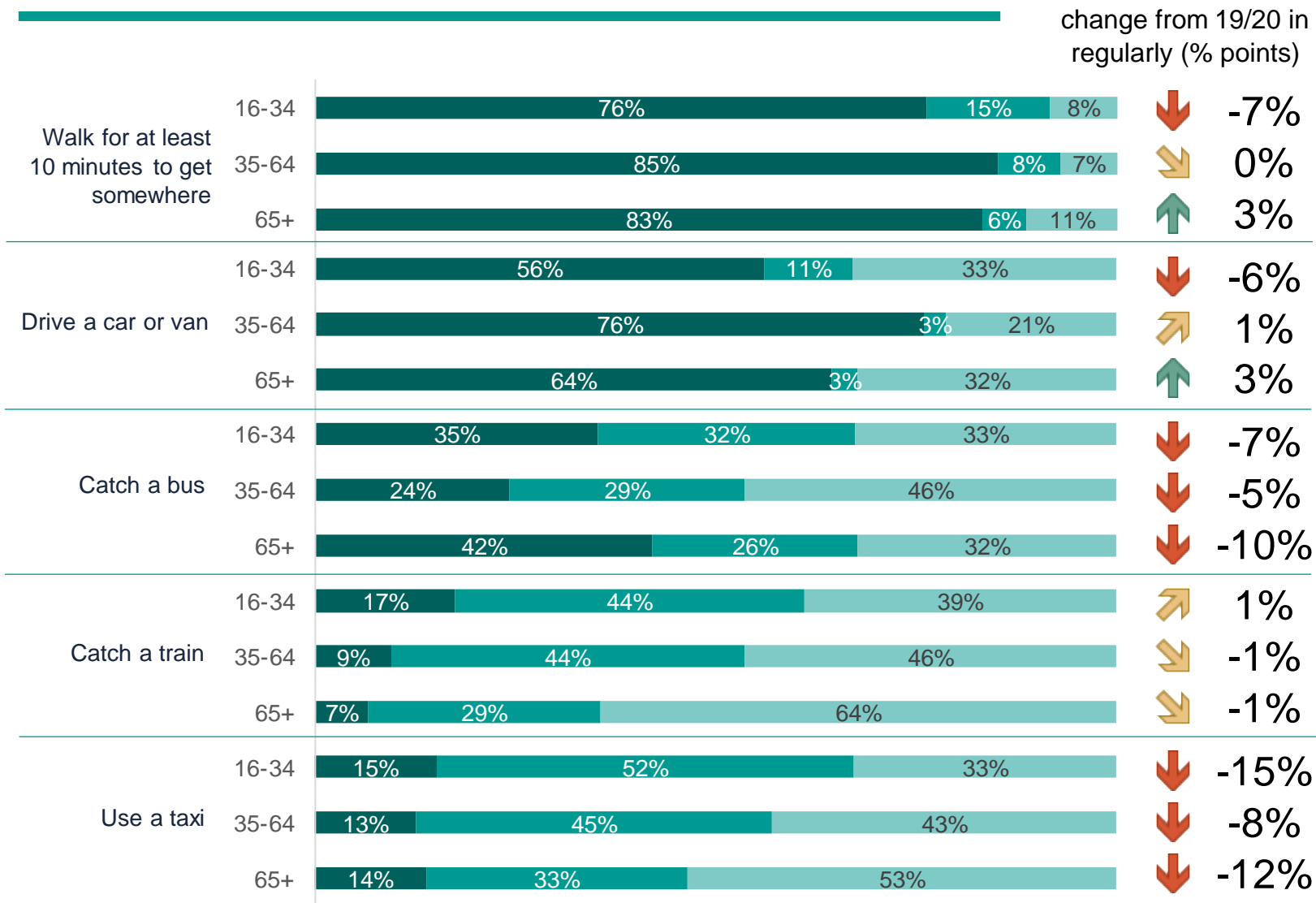
Importance vs Satisfaction

Plotting mean importance score by mean satisfaction score for all on a strategic priority matrix reveals areas the areas where assets and services are performing well and areas which most urgently need improvement.



Source: Question B1: Please say how important each of these is to your local area on a scale of 1 (not important) to 10 (very important) and question B2: Please say how satisfied you are on a scale of 1 (very dissatisfied) to 10 (very satisfied). Base: B1 all respondents (n=1,808), B2 all respondents who gave a valid importance rating at B1 (bases vary).

Mode choice: by age



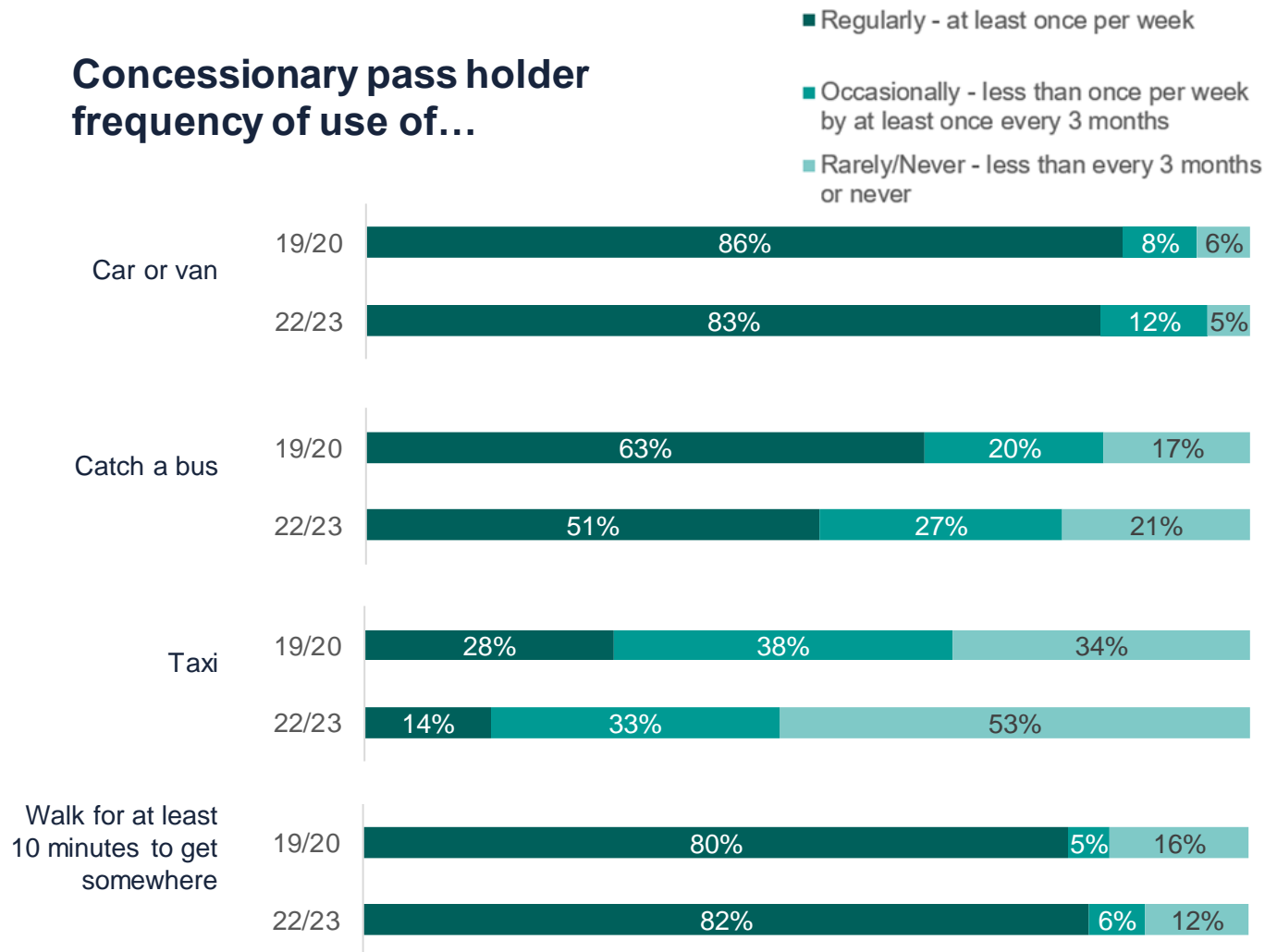
- Breaking transport mode use down by age reveals that driving is more popular among 35-64 year olds than the other two age groups, while the reverse is true for catching a bus.
- Catching a train, cycling, travelling as a car or van passenger, and taxi use declines with age.
- 16-34 year olds are the age group least likely regularly to walk for 10 minutes to get somewhere.
- Occasional taxi use is higher amongst younger residents.

■ Regularly - at least once per week
■ Occasionally - less than once per week by at least once every 3 months
■ Rarely/Never - less than every 3 months or never

Source: Question C7. Thinking about how you travel in West Yorkshire, including the West Yorkshire part of cross-boundary journeys, how often do you...?
 Base: all respondents (n=1,808 – by age group 16-34 n=517, 35-64 n=861, 65+ n=411)

Concessionary pass holders are using both the bus and taxis less and walking more

Concessionary pass holder frequency of use of...

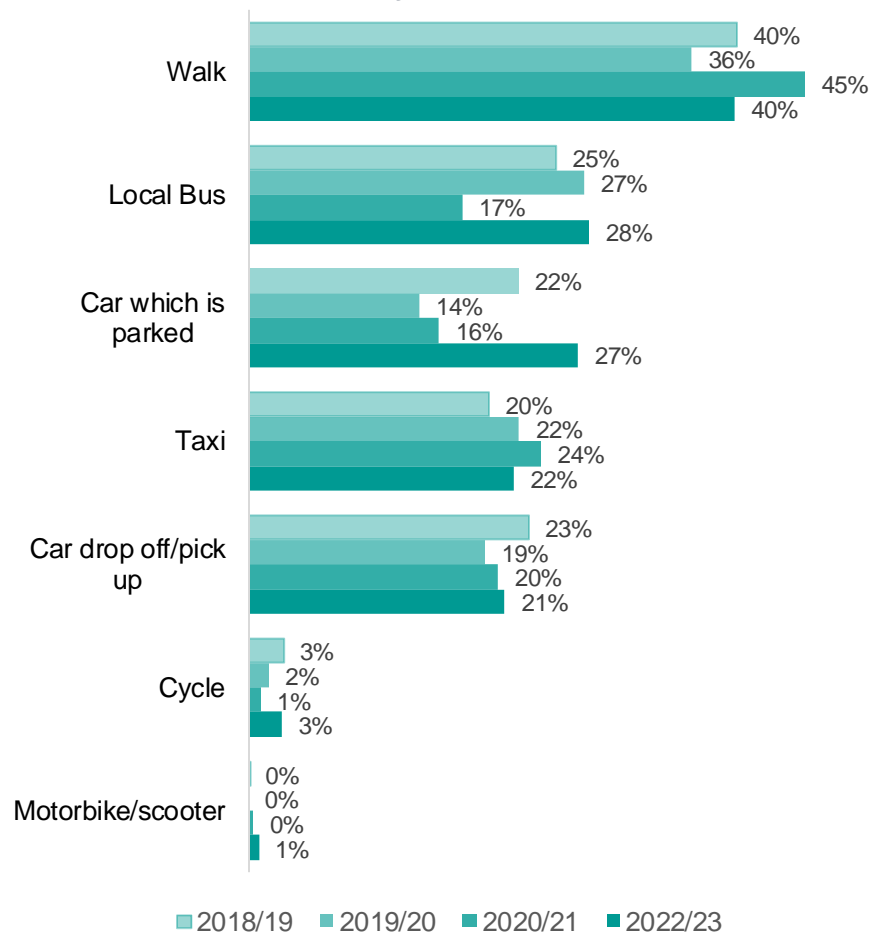


- The proportion of residents with a concessionary bus pass who are using the bus regularly (at least once a week) fell during the pandemic and has not recovered to pre-pandemic levels.
- The proportion of concessionary bus pass holders who are rarely (less than once every 3 months) or never use the bus has also increased.
- The proportion of concessionary bus pass holders walking regularly and occasionally has increased slightly relative to pre-pandemic.

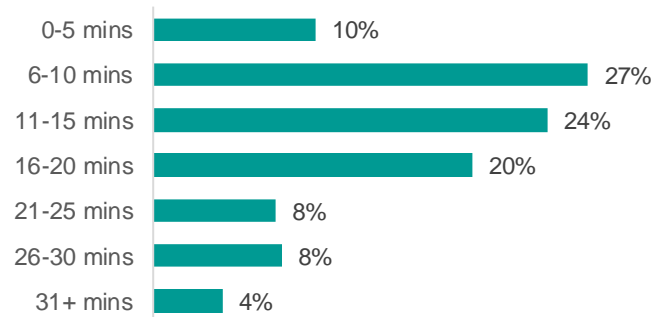
Source: Question C7. Thinking about how you travel in West Yorkshire, including the West Yorkshire part of cross-boundary journeys, how often do you...?
 Base: Question E13 - Has concessionary pass and does not pay for travel 19/20 n=379, 22/23 n=312

Travelling by car or van remains the most popular method of travelling to a rail station

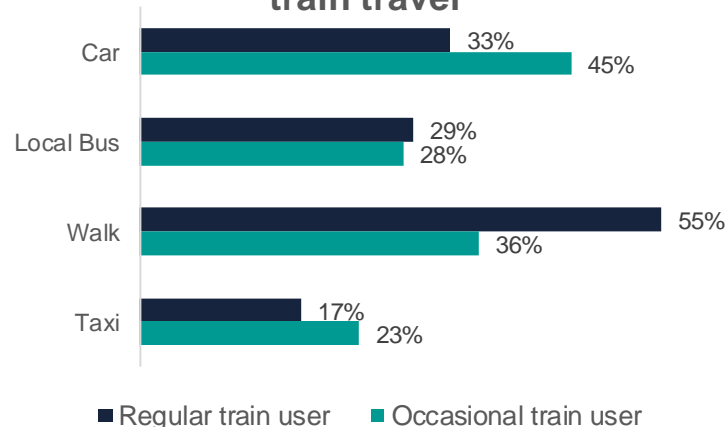
Usual method used to get to and from your local rail station



Length of walk to local rail station



Method used by frequency of train travel



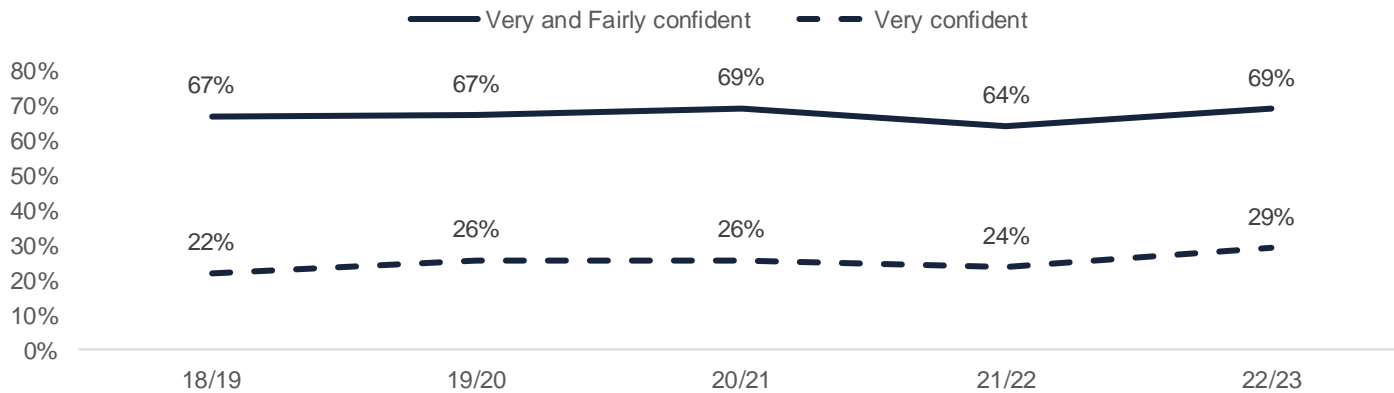
- 42% of respondents either drive or get a lift to the rail station when travelling by train
- The proportion of people using the bus to travel to the rail station has risen after a fall during the pandemic
- 61% of the respondents walked up to 15 minutes to catch a train
- Those who use the train regularly are more likely to walk to the rail station

Source: Question C8. When travelling by train how do you usually get to and from your local rail station? Multi select question C8a. How long does this walk take? (Minutes)
 Base: C8: all respondents who travel by train every 2-3 months or more often (18/19 n=540, 19/20 n=748, 20/21 n=444, 22/23 n=936). C8a: all respondents who walk to the rail station (n=372).

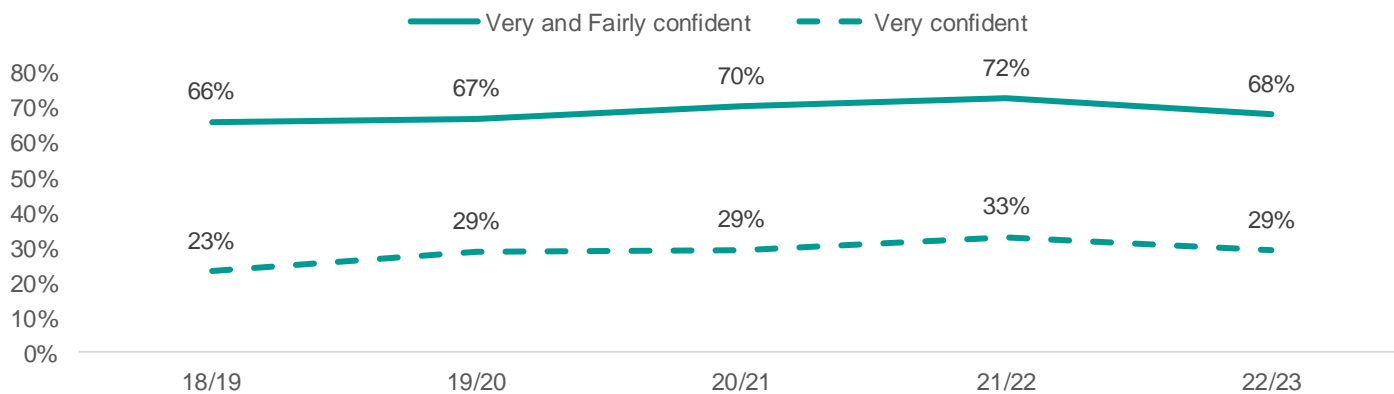
Confidence purchasing the best value tickets

Confidence purchasing the best value...

Bus tickets¹



Train tickets¹



- 69% residents (excluding those who have a bus pass) reported being confident purchasing the best value bus ticket. This rises to 85% for regular bus users (use the bus at least weekly). Results are largely consistent across demographics, although the social grade group C2DE (skilled manual workers, semi- and unskilled manual workers unemployed) are slightly more likely to be very/fairly confident (73%) compared to the ABC1 group (high managerial, professional, and supervisor roles) (67%).

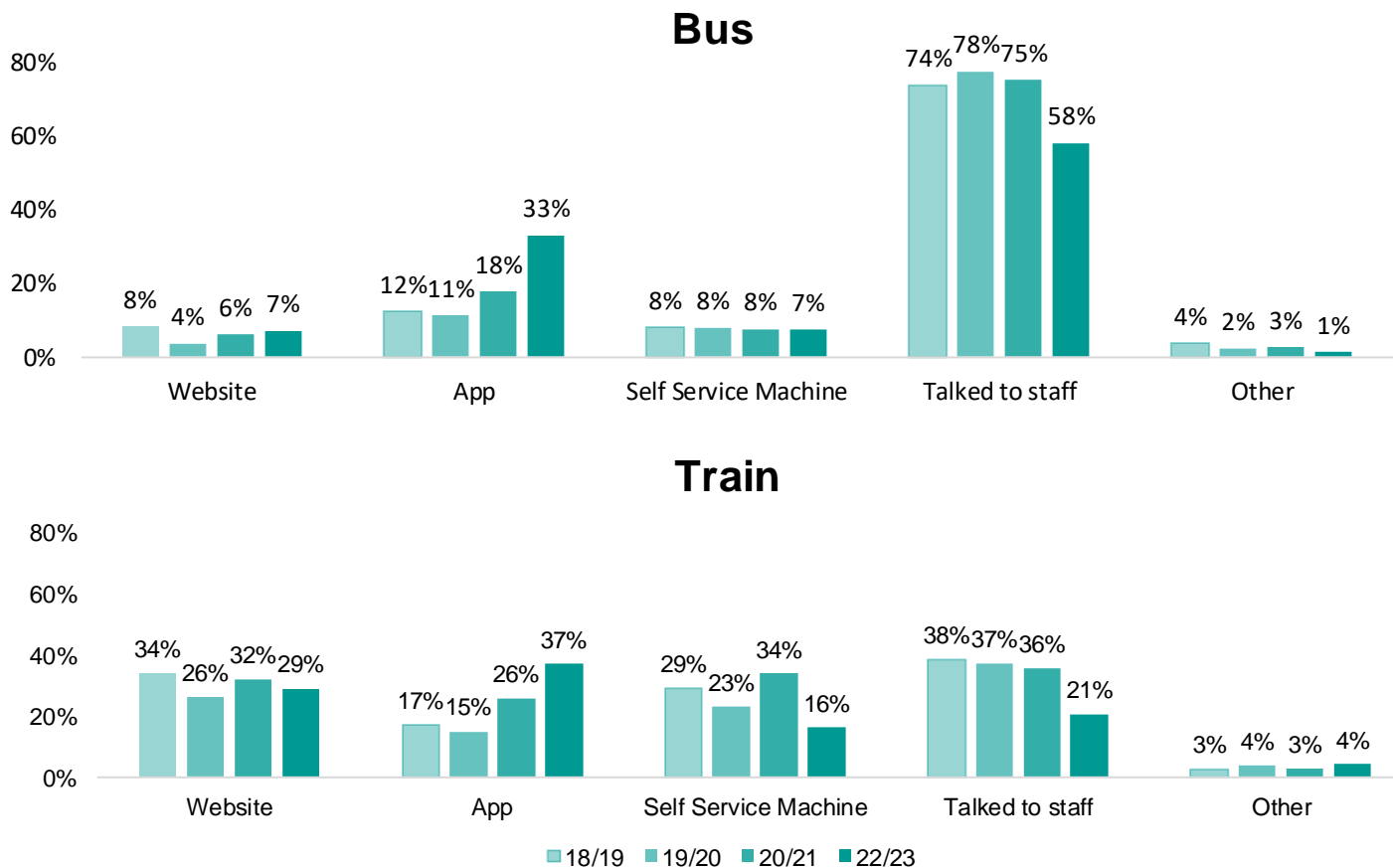
- Levels of confidence in buying rail tickets is consistent with that of bus tickets. There are few demographic differences, although those with a disability are significantly less likely to feel confident (61%) compared to those with no disability (70%).

Source: Question E13/E23. When you travel on local buses / trains in West Yorkshire, how confident would you be/are you that you usually purchase the best value ticket?

Base: E13. all respondents excluding don't know or have a bus pass (n=1,411). E23. all respondents excluding don't know or have a train pass (n=1,675). 1. Transport Strategy Indicator

Rail tickets purchases continue to be much more likely to be self-service than bus ticket purchases

Method used the last time you bought a ticket for...

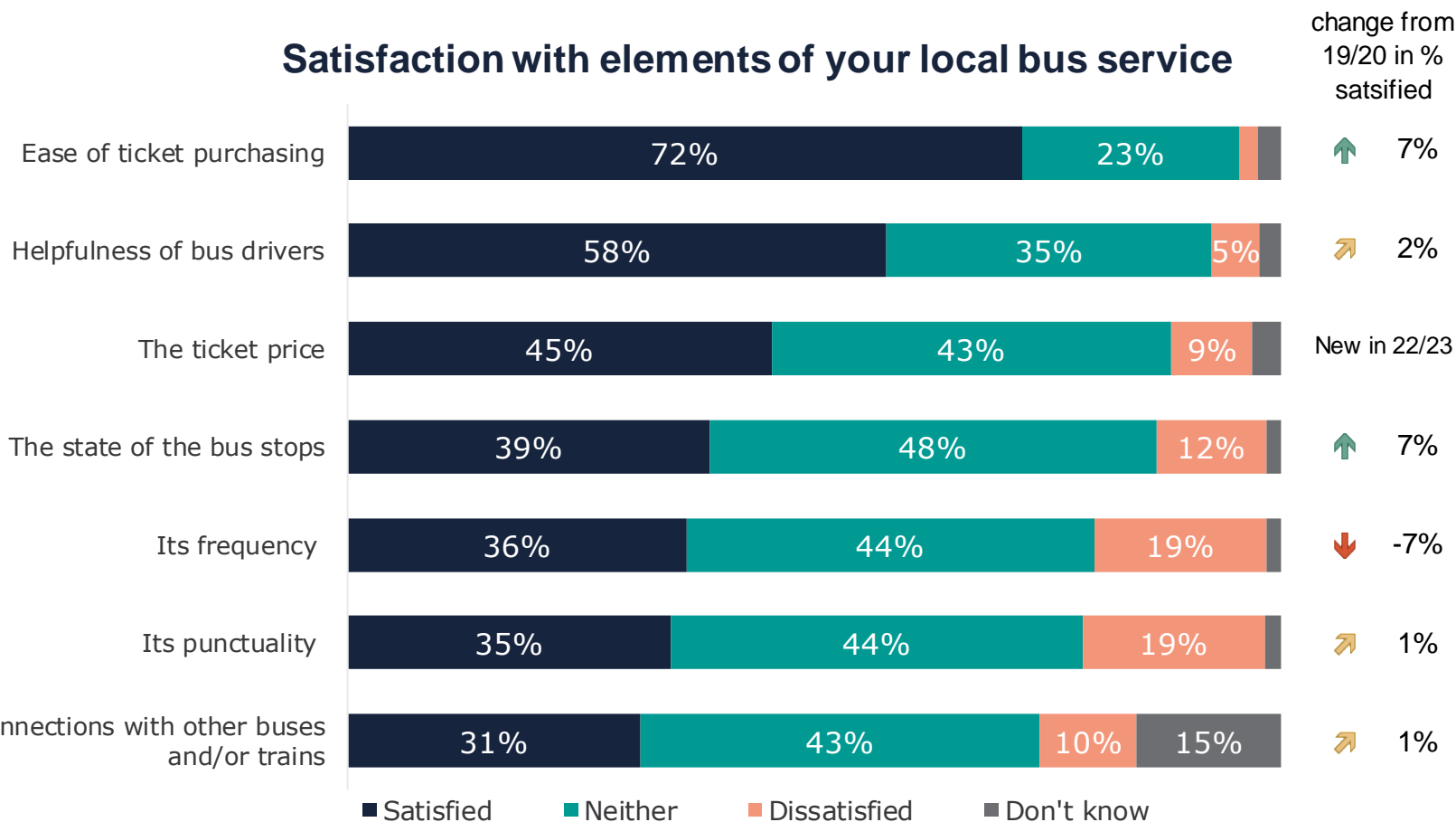


- Of those who had purchased a train ticket in the last year, 63% reported using an app or a website to do so, although more traditional methods are still used also, with 21% purchasing a ticket by talking to staff and 16% through a self-service machine.
- Modern methods of ticket purchasing are not as prominent for buses as they are on trains, with 38% of bus users (without a pass) utilising an app or website, although this is a marked increase compared to previous years. The traditional method of talking to staff remains the most popular, used by 58%.

Source: Questions J11 What method did you use the last time you bought a train ticket? and K11 What method did you use the last time you bought a bus ticket?
 Base: J11: Respondents who have used a train in the past year, do not use a free train pass, and was applicable (18/19 n = 1012, 19/20 n = 961, 20/21 n = 763, 22/23 n = 995)
 Base: K11: Respondents who have used a bus in the past year, do not use a free bus pass, and was applicable (18/19 n = 1203, 19/20 n = 1168, 20/21 n = 975, 22/23 n = 1220)

Perceptions of the ease of purchasing a bus ticket and the state of bus stops has improved, whilst satisfaction with bus frequency has fallen

Satisfaction with elements of your local bus service



Only with ease of ticket purchasing (72%) and helpfulness of bus drivers (58%) were a majority of respondents satisfied.

Ticket prices have the 3rd highest satisfaction rating (45%). Meanwhile, frequency and punctuality attract the highest levels of dissatisfaction (both 19%).

Satisfaction with frequency of service has fallen by 7 percentage points since before covid.

Source: Question M12 Regarding your local bus service, how satisfied are you with each of the following? Respondents were asked to rate their satisfaction on a scale from 1 to 10, 1-3 has been interpreted as dissatisfied, 4-7 as neither and 8-10 as satisfied

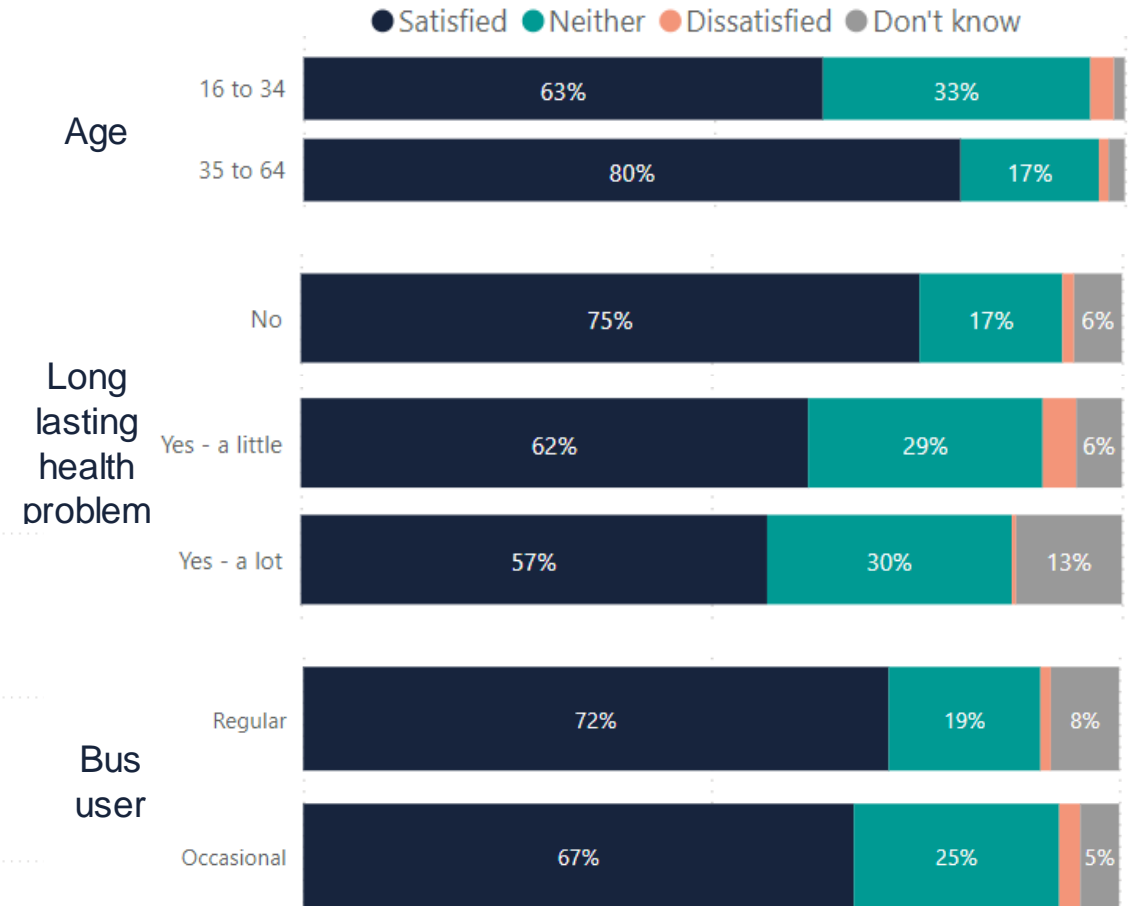
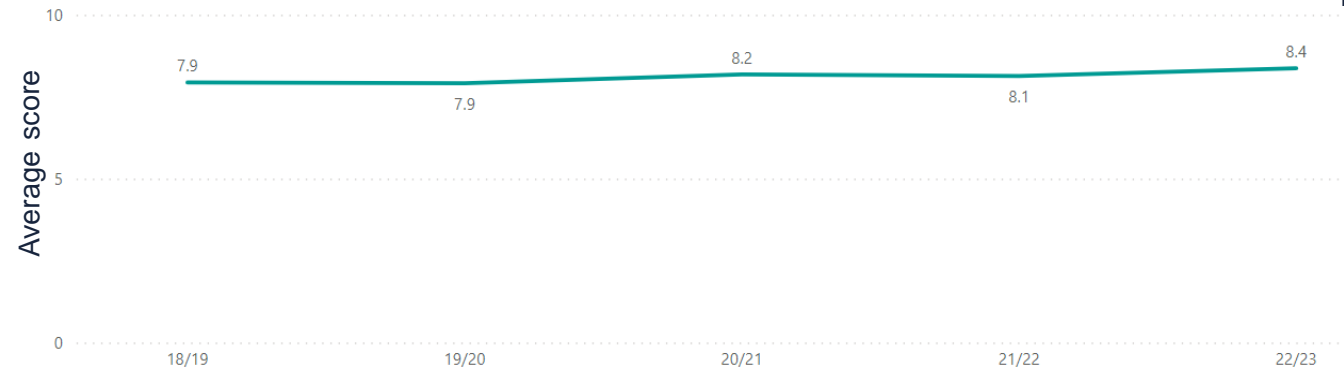
Base: 2022/22 Survey - All respondents who take a bus every 2 to 3 months or more often (n = 1,070) except for Ease of ticket purchasing and Ticket price which exclude respondents with a concessionary pass (n = 804) **2019/20 Survey** - Number of respondents asked this question who take a bus every 2 to 3 months or more often (n = 845) except for Ease of ticket purchasing which excludes those with concessionary pass (**question E11**) (n = 623)

Satisfaction with the ease of purchasing a bus ticket

Average satisfaction scores for the ease of purchasing a bus ticket reached 8.4 out of 10 in 2022/23, the highest levels in 5 years. Satisfaction scores are lower for the following groups:

- Residents aged 16-34
- Residents with a long-lasting health problem or condition which limits day to day activity
- Residents from an ethnic minority group
- Occasional bus users

Satisfaction with ease of purchasing a bus ticket



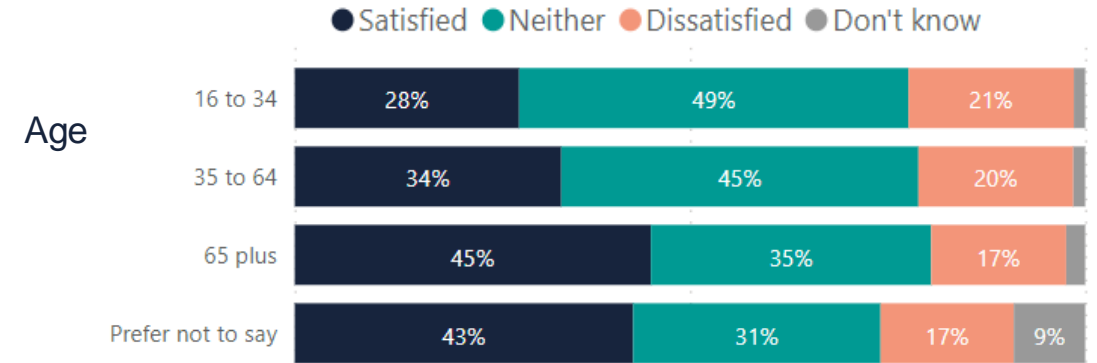
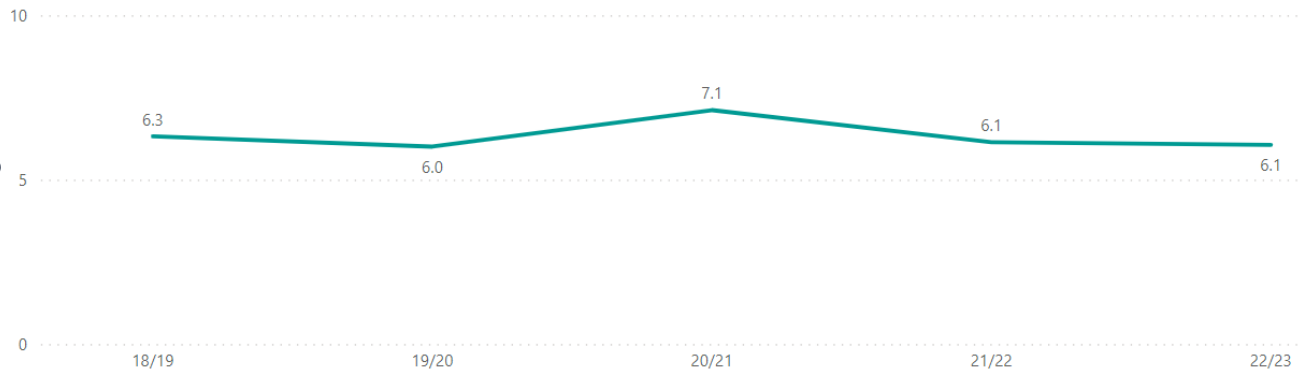
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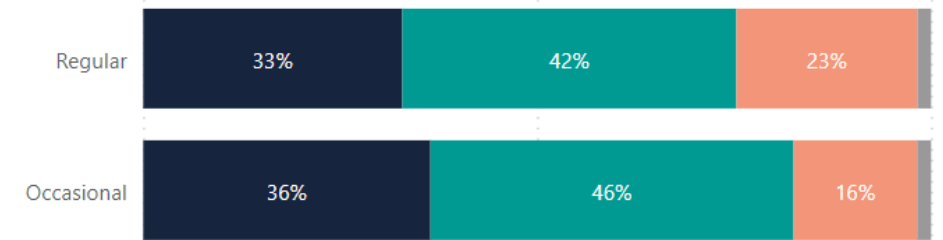
Satisfaction with bus punctuality

Average satisfaction scores for bus punctuality were unchanged from last year at 6.1 out of 10 in 2022/23 but were higher in previous years. Satisfaction was lowest amongst the younger age groups. Although one third of regular (at least weekly) bus users were satisfied with bus punctuality, more than 1 in 5 were dissatisfied.

Satisfaction with bus punctuality



Bus user

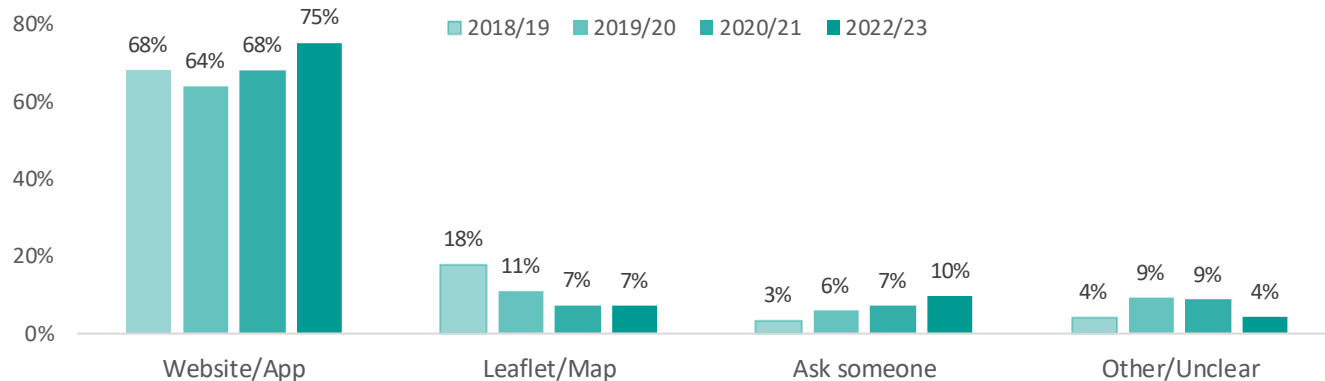


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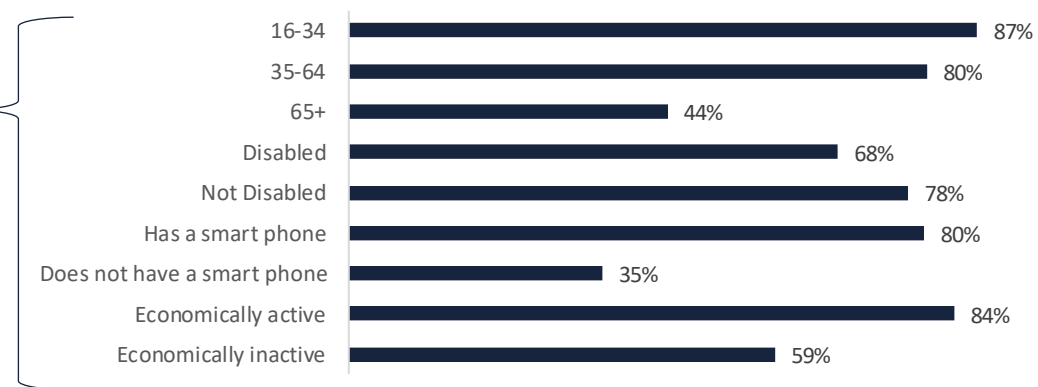
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Three quarters of people now plan their journeys using an App or Website

Information sources used when respondents last planned a bus or train journey



Demographic of respondents using a website or app

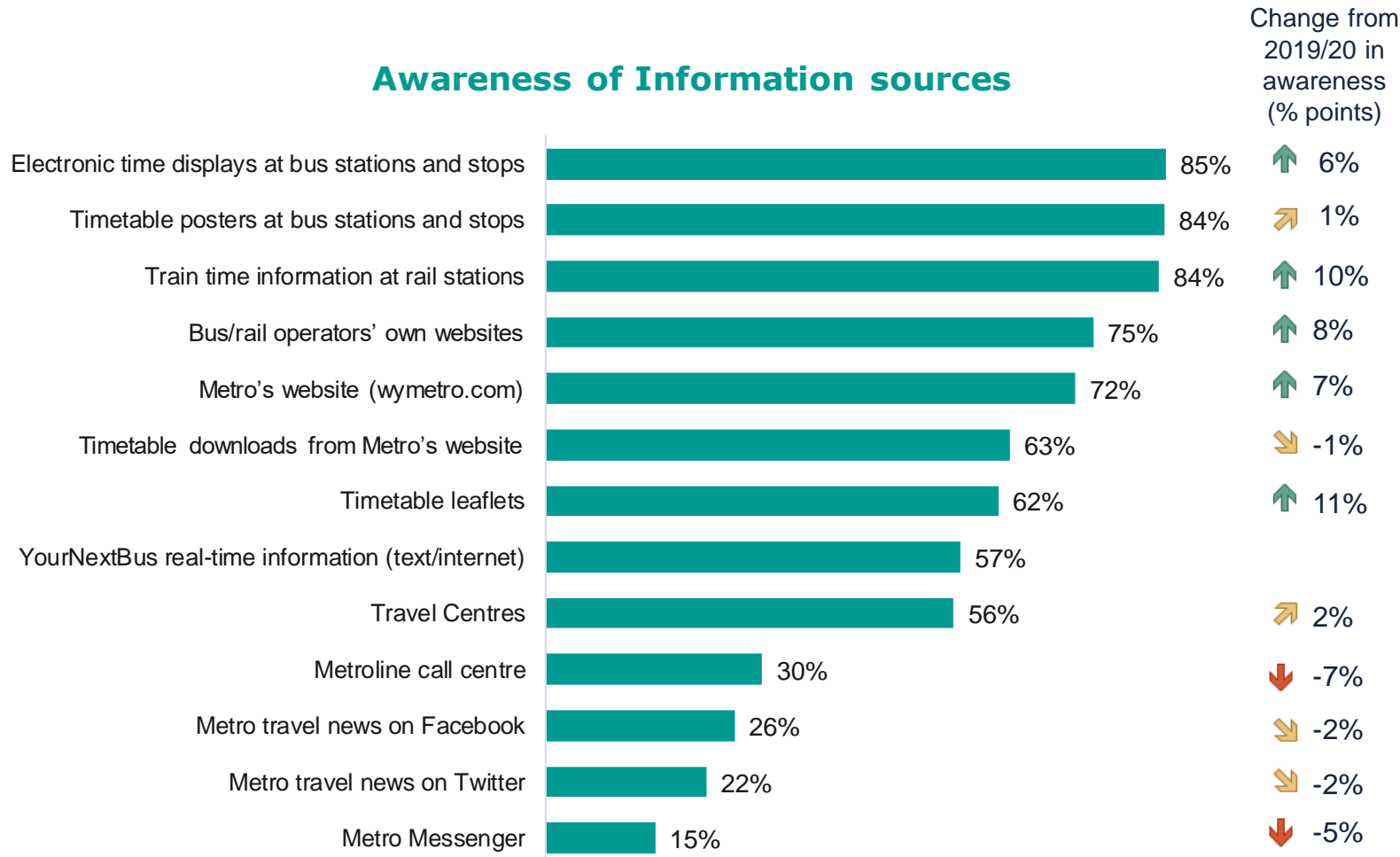


- The percentage of West Yorkshire residents using websites or apps to plan public transport journeys has risen to 75% of those who have travelled on train or bus within the last year.
- The percentage of those asking for information from either friends or family, staff or on the phone has also increased to 10%
- Usage of websites and apps varies by age with those under 35 being most likely to be using a website or app. Older people and those without a smart phone are the least likely groups to pre plan journeys this way.

Source: Question G11: Thinking about the last time you planned a local bus or train journey before setting off, how did you get the information that you needed? Multi select question
 Base: Those who have used a bus or train in the past year 18/19 – 1514, 19/20 – 1561, 20/21 – 1265, 22/23 - 1553

Awareness of information sources

Awareness of Information sources



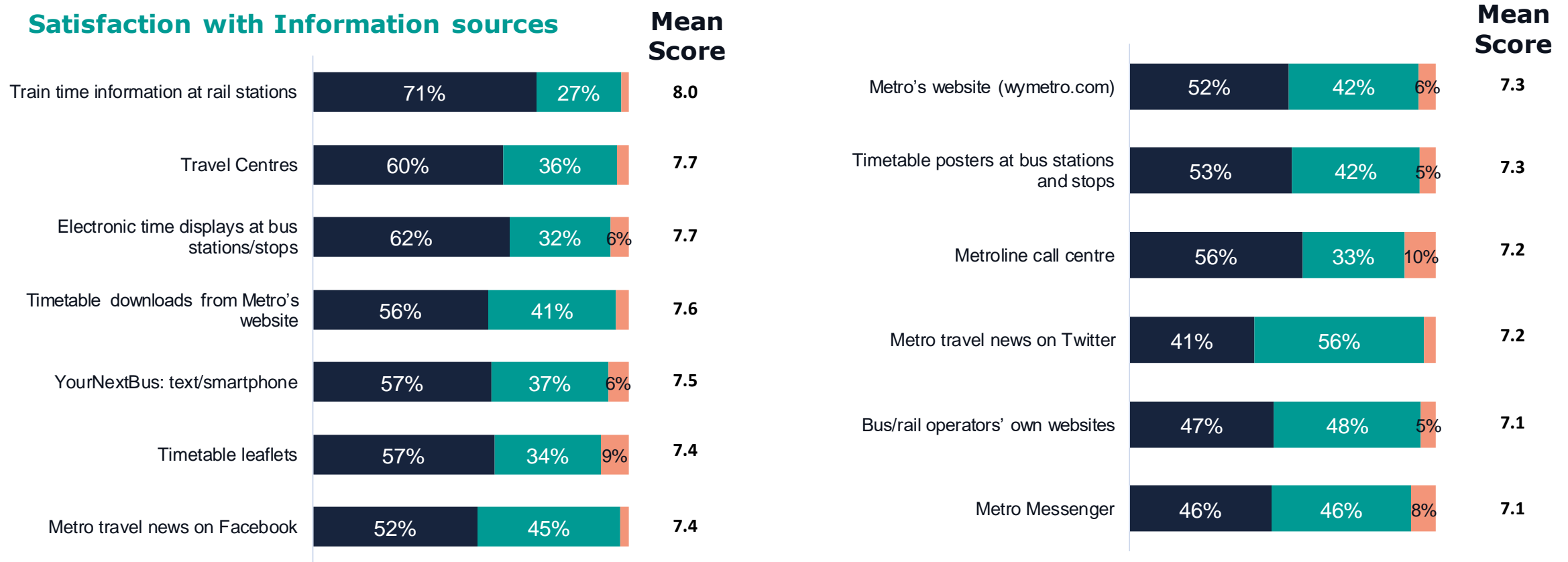
- West Yorkshire residents are most aware of electronic displays at bus stations and stops/shelters with a 6%-point improvement since pre-pandemic.
- Social media sources (37% Twitter & 38% Facebook) and Metro Messenger (25%) enjoy higher than average awareness among 16-34 year olds.
- Use of operators' and Metro's website tends to be fairly similar among 16-34 and 35-64 year olds, but is lower for those aged 65+.

Source: Question D3: Are you aware of the following? (% yes)
 Base: All respondents (1808).

Satisfaction with information sources

Train time information at rail stations has the highest mean satisfaction score (8.0) followed by travel centres and electronic time displays for buses (both 7.7). Dissatisfaction is low across the board, not exceeding 10% for any source.

Satisfaction with Information sources



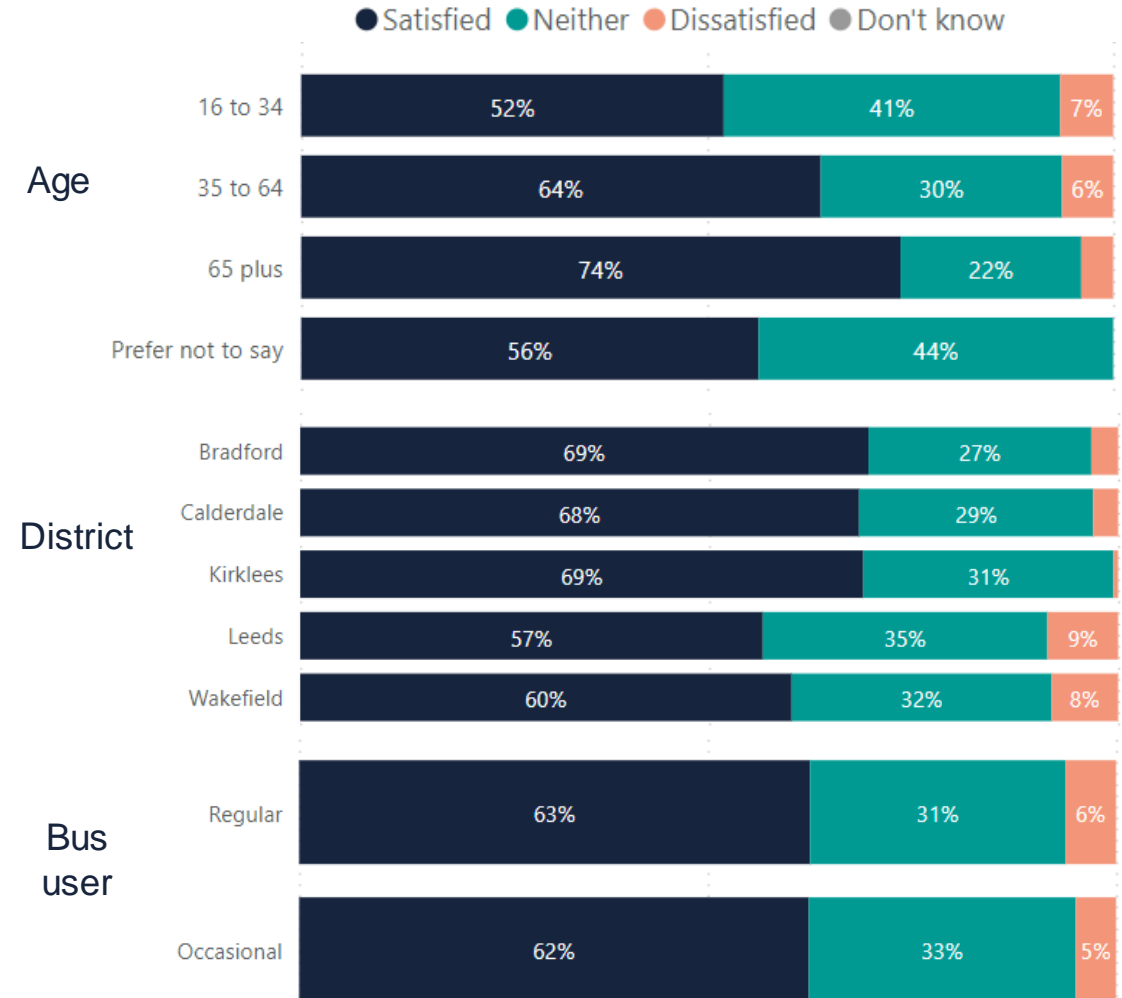
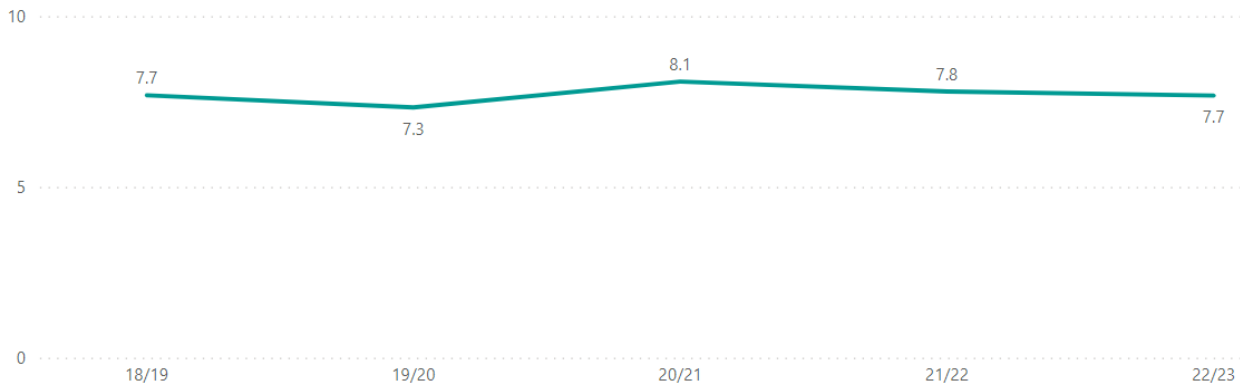
Source: Question D5. How satisfied or dissatisfied are you with this information source? (on a scale of 1 to 10; very dissatisfied to very satisfied)

Base: Those who use information source frequently/occasionally (varies between sources) 1. Transport Strategy indicator

Satisfaction with electronic real time displays at bus stops & stations

Average satisfaction score for bus RTI displays at stops and stations in 2022/23 was 7.7 out of 10 (62% were satisfied). Satisfaction levels for those aged 16-34 were *significantly* lower than for respondents aged 65 and over (52% vs 74% satisfied). Satisfaction levels were also *significantly* lower for residents of Leeds compared to residents of Bradford and Kirklees.

Satisfaction with RTI displays

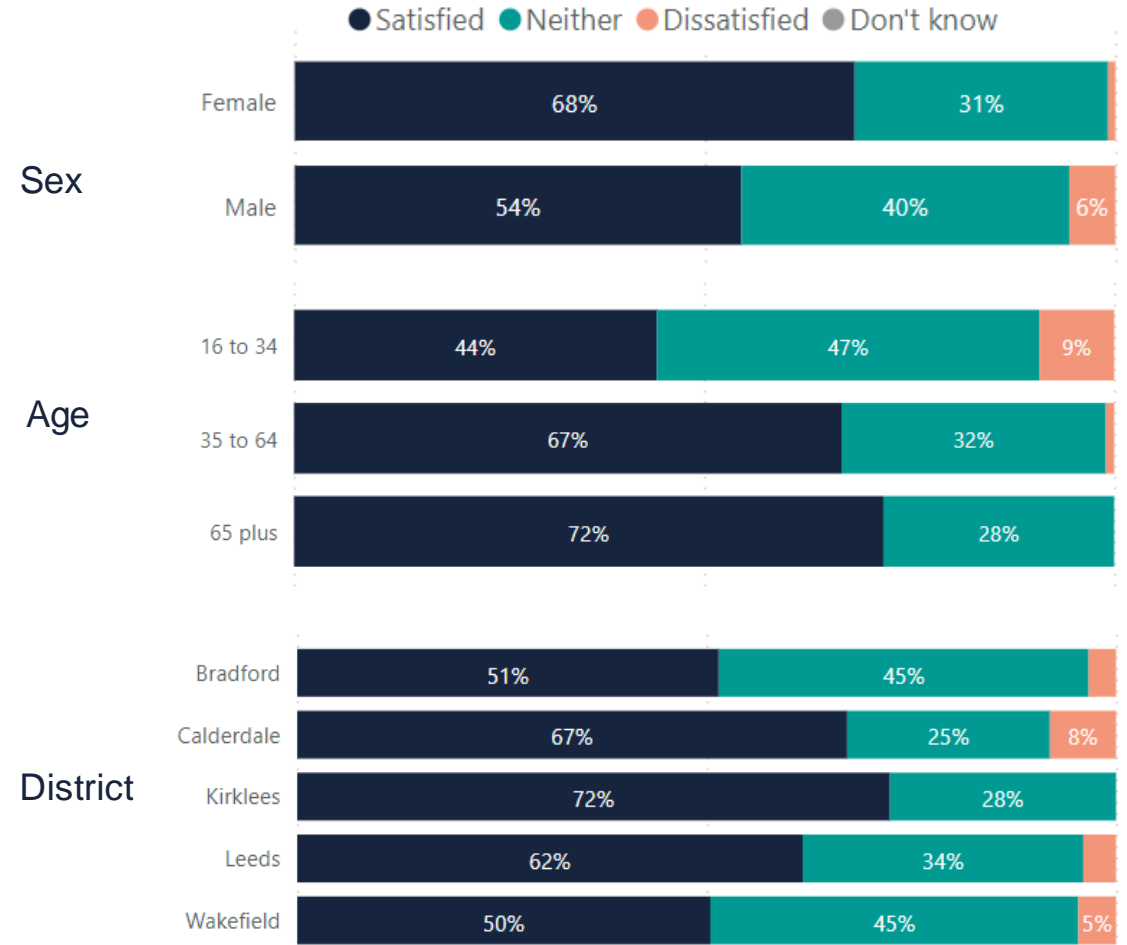
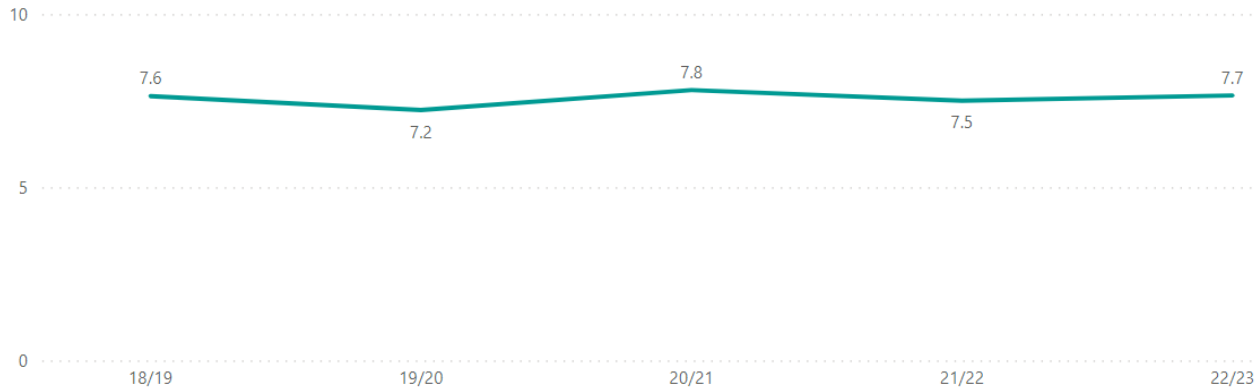


Source: Question D5. How satisfied or dissatisfied are you with electronic RTI displays at bus stops and stations? (on a scale of 1 to 10; very dissatisfied to very satisfied)
 Base: Those who use information source frequently/occasionally (493)

Satisfaction with travel centres

Average satisfaction score for travel centres in 2022/23 was 7.7 out of 10 (60% of all respondents were satisfied). Satisfaction levels were lower for men compared to women. Satisfaction levels for those aged 16-34 were *significantly* lower than for respondents aged 65 and over (44% vs 72% satisfied). Satisfaction levels were *significantly* higher for residents of Kirklees (72% satisfied) compared to residents of Bradford (51% satisfied).

Satisfaction with travel centres



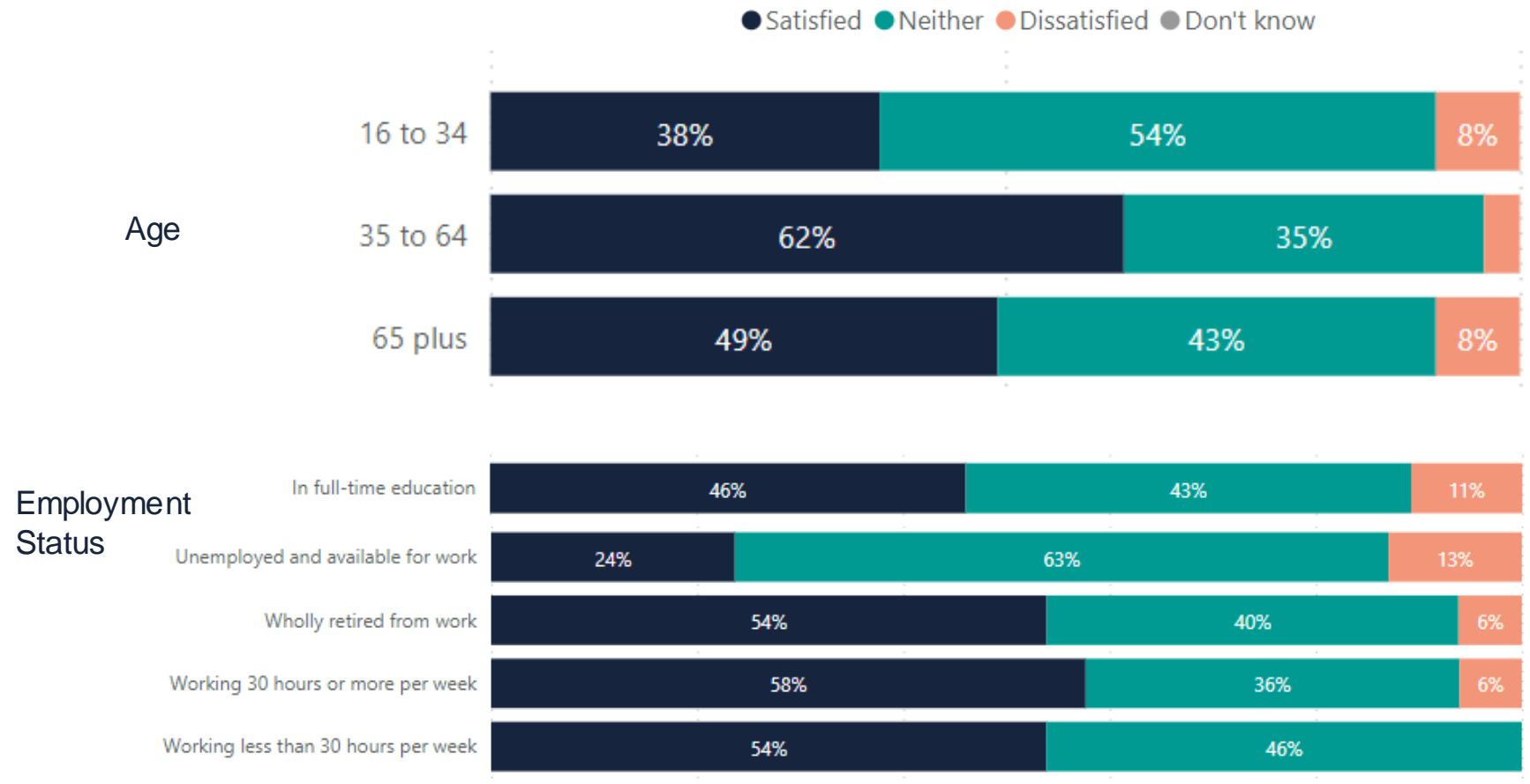
Source: Question D5. How satisfied or dissatisfied are you with travel centres? (on a scale of 1 to 10; very dissatisfied to very satisfied)
 Base: Those who use information source frequently/occasionally (246)

Satisfaction with the Metro website

Average satisfaction score for the Metro website in 2022/23 was 7.3 out of 10 (52% of all respondents were satisfied).

Satisfaction levels for those aged 16-34 were *significantly* lower than for respondents aged between 35-64 (38% vs 62% satisfied).

Satisfaction levels were lowest for residents who were unemployed and available for work. Satisfaction scores were *significantly* lower for residents in full-time education compared with residents working 30 hours a week or more.



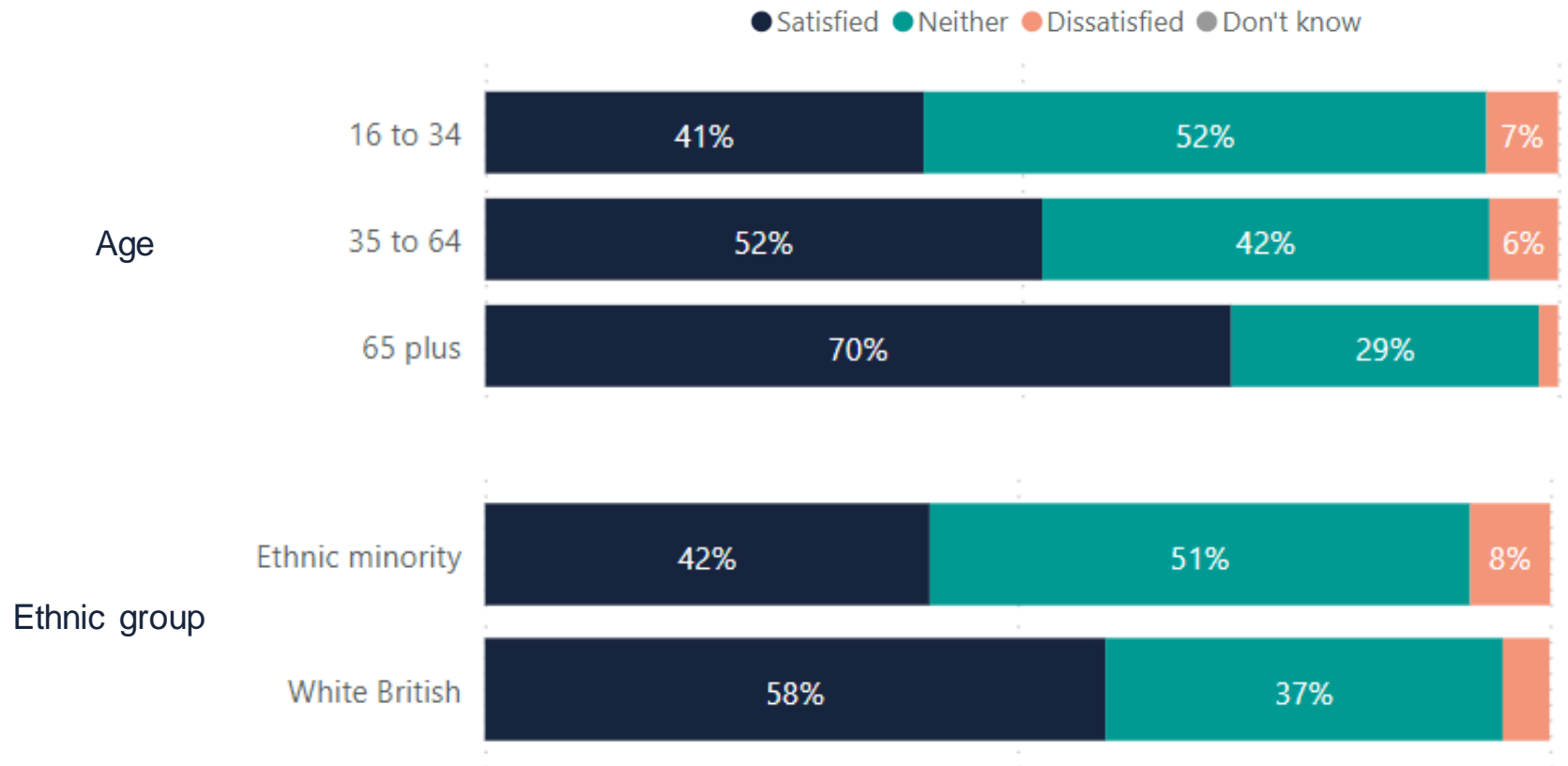
Source: Question D5. How satisfied or dissatisfied are you with the Metro website? (on a scale of 1 to 10; very dissatisfied to very satisfied)
 Base: Those who use information source frequently/occasionally (431)

Satisfaction with timetable posters at bus stops & stations

Average satisfaction score for timetable posters at bus stops and stations in 2022/23 was 7.3 out of 10 (53% of all respondents were satisfied).

Satisfaction levels for those aged 16-34 were *significantly* lower than for respondents aged between 65 and over (41% vs 70% satisfied).

Satisfaction levels were *significantly* lower for residents who identified as an ethnic minority group compared with residents who identified as white British (42% vs 58% satisfied).



Source: Question D5. How satisfied or dissatisfied are you with timetable posters at bus stops and stations? (on a scale of 1 to 10; very dissatisfied to very satisfied)
 Base: Those who use information source frequently/occasionally (607)

Confidence in personal safety when travelling on public transport has fallen since last year

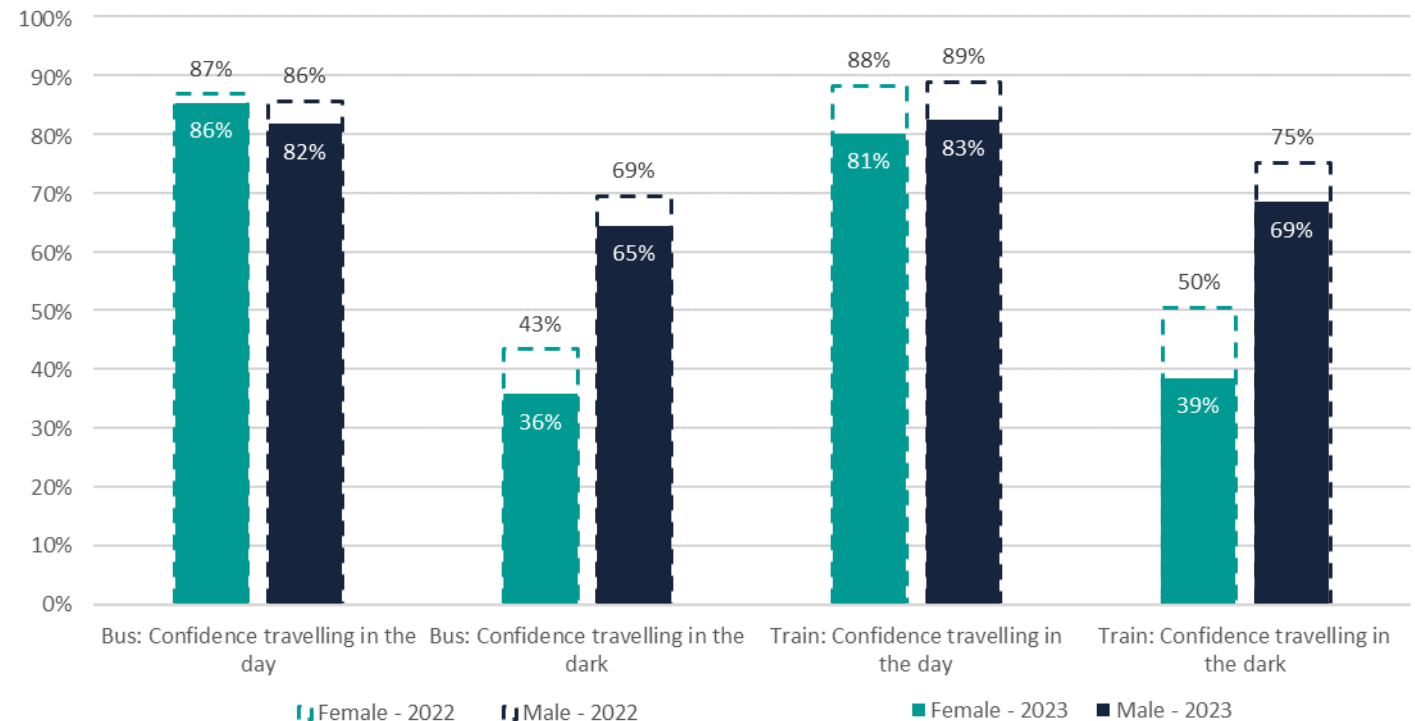
Confidence in personal safety when travelling on both train and bus has fallen over the past year for both males and females.

The drop in confidence has been more for train travel than bus, more for females than males and more in the dark than during the day.

Groups also with low confidence levels on bus in the dark are:

- Those aged 65+: 41%
- People who use the bus never or less than once a year: 36%
- The long-term sick and disabled: 29%

Confidence of personal safety when travelling by bus and train



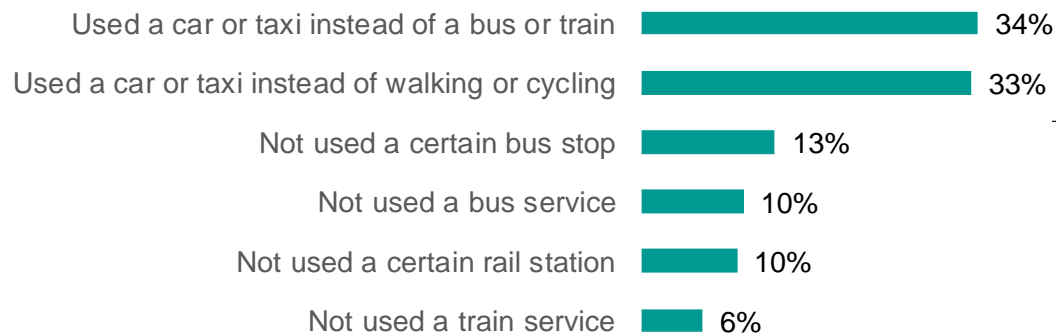
Source: Question N31: how confident do you feel about your personal safety when using local buses/trains in the day/dark?

Base: 22/23 Survey – All respondents (1808 for bus and train) 21/22 Survey – Respondents with time for extra questions (Bus 1051, train 1055)

More than half of respondents have altered travel behaviour to avoid antisocial behaviour or from fear of crime in the last year

When asked about actions to avoid antisocial behaviour or from fear of crime 52% of respondents reported at least one of the below:

Actions to avoid antisocial behaviour or from fear of crime?



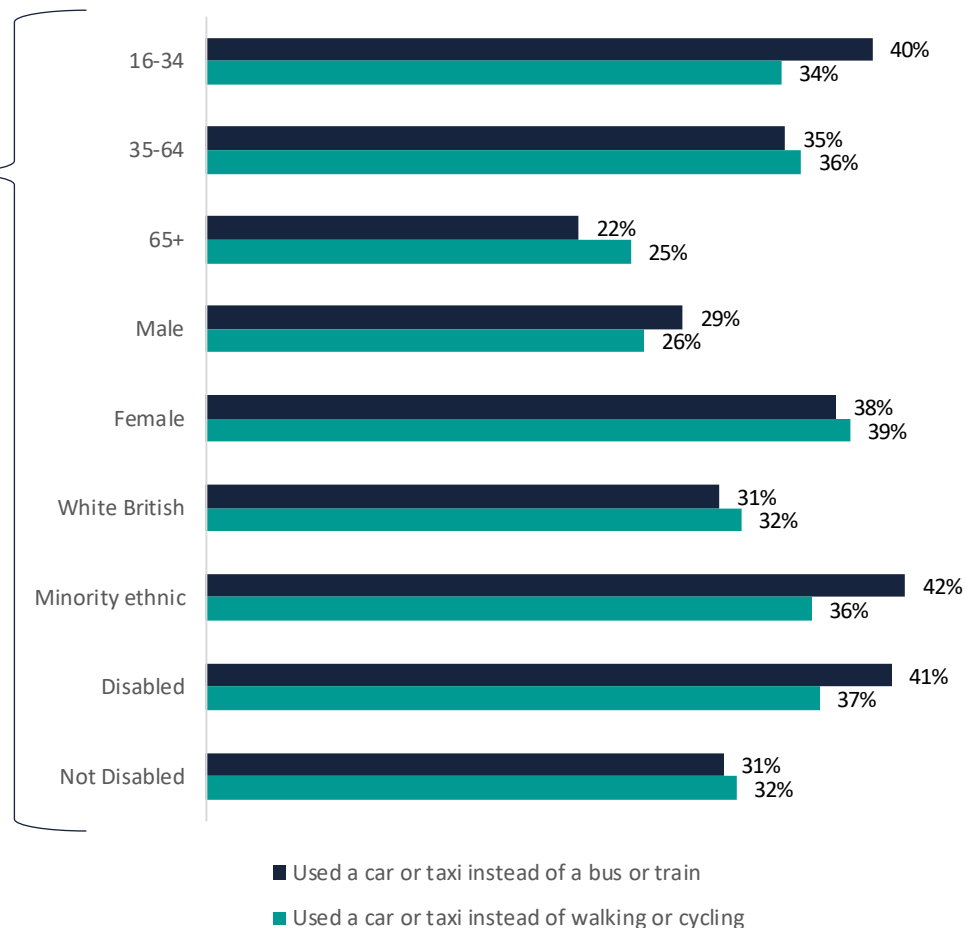
Just over one third of people have used a car or taxi instead of a bus or train and one third of people have used a car or taxi instead of walking or cycling.

One in 10 people have not used a bus service.

Changes are more common among younger people, females, those from an ethnic minority and those with a disability.

46% of those in full-time education have used a car or taxi instead of a bus or train.

Demographic breakdown



Source: Question N35. In the last 12 months, which of these have you done to avoid antisocial behaviour or from fear of crime? (multiselect)

Base: all respondents (n=1,808 – by age group: 16-34 n=517, 35-64 n=861, 65+ n=411, by gender: Male n=905, Female n=892, by ethnicity: White British n=1517, Minority Ethnic n=265, by disability: Disabled n=478, Not Disabled =1312)