APPENDIX A

SYPTE Customer Strategy Part 2

July 2014

Short & Medium Term Drivers

This July 2014 update focuses on bringing together the latest information on customers and public transport performance in South Yorkshire. This updates the key evidence base and refreshes the insight on the needs and priorities of customers, the changes that have occurred during the last year and the impact felt by customers of these changes.

Strategic Intelligence & Performance

Executive Summary

KEY HIGHLIGHTS - since July 2013

- **Funding** – Over £20m obtained from government through bids for Bus Rapid Transit North and Local Sustainable Transport Fund II
- **Passenger travel**[1] – The overall number of passengers travelling by bus, tram and train rose 1.4% to over 130 million in 2013-14 driven by growth in fare-paying bus passengers
  - Reversal of historic decline in bus passengers since de-regulation
  - Tram usage fell for the third year in a row to 12.6 million, the 13% decline is due to the impact of track replacement works and continued falls in child concessionary travel
  - Key issues for rail remain declining fare-paying passenger numbers and to improve passenger information
  - The main reasons for travelling, to go to work, education/training and shopping, remain unchanged[2]
- **Customer needs**[2] – The primary issues/needs identified are unchanged:
  - Network and services – places that people can get to on the current public transport network
  - Ticketing and affordability – low satisfaction with value for money and although there are varied ticket offers they are not easily understood and there are limited purchase options
  - Information and promotion – confusing messages and not communicating using 21st century methods
- **Customer offer** – The range of service offered is not comprehensive and uniform across South Yorkshire
  - **Service performance** – Bus, Tram and Rail punctuality and reliability performance is generally on a long term upward trend[3]
  - **Satisfaction** – A significant number of customers remain dissatisfied with the service; in particular with value-for-money and current information provision[4]
  - **Customer Comments** – Down by nearly 20% in the first quarter of 2014-15 compared to the same period last year[5]
- **Investment Delivery** – Key elements include:
  - Self-service options being rolled out
  - However smart ticketing and infrastructure projects are behind initial plans

KEY ACTIONS

- **Network** – Seek network, service and facilities changes in response to customer needs; including for non-users
- **Service performance** – Develop plans and options to improve poor performance with operators and partners
- **Ticketing** – Develop and deliver new ticketing (and information) options

***Note**: Key recurring sources are listed in the source reference section on pages 17 and 18*

Overview:
Chapter 5 Customer Strategy (Part 2) – short and medium term drivers

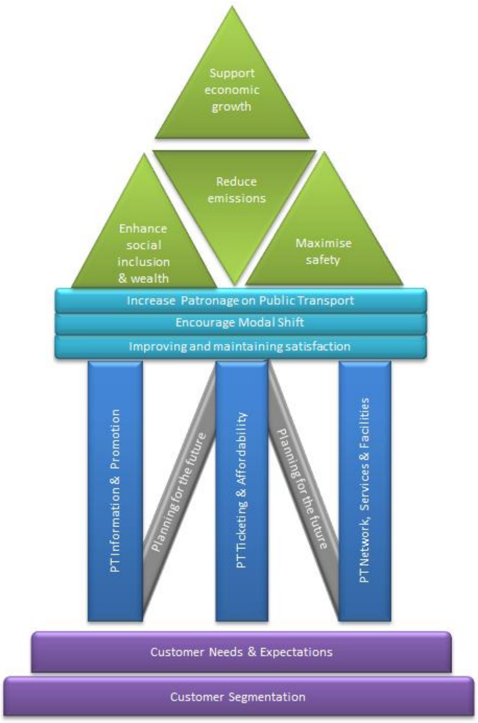
To achieve success and deliver the objectives set out in Part 1 of this Customer Strategy, namely to:

- Grow bus/tram/train patronage…
- By making people want to choose the bus/tram/train…
- Through making bus/train/tram travel more attractive…
- By improving the areas customers tell us they need improving (and stop/reduce spending in other areas)…
- Thereby raising the positivity of their feelings towards bus/tram/train travel…
- And building a relationship where customers know we care…
- And as a consequence get customers to tell their family and friends, supported by promotional activity

We must regularly challenge and update our customer intelligence, using the latest data and trends to prioritise our activity. This part of the document will be updated at least annually to reflect current customer insight, complaints issues and other relevant information that impacts the current drive of the organisation's objectives and resource focus. Regular updating will allow us to confirm priorities for the coming year and take account of changes in priorities through emerging or met needs, having due regard to the fact that the data upon which business planning is taken may be out of date due to interventions already being delivered.

This July 2014 update focuses on bringing together the latest information on customers and public transport performance in South Yorkshire. This updates the key evidence base and refreshes the insight on the needs and priorities of customers, the changes that have occurred during the last year and the impact felt by customers of these changes.

The Customer Model:



There are over 1.34 million men, women and children in South Yorkshire.[6] Public transport can, and does, play a key role in helping people travel; whether this is going to school or college, to training/employment, meeting friends or to access the many leisure activities available across the county.

The previous Customer Strategy Part 2 update (July 2013) highlighted an overall fall in passenger travel[7] (down 5% to 128 million), driven by heavy declines in both child concessionary and ENCTS (older people and mobility impaired) travel outweighing a rise in the number of fare-paying passengers. The main reasons for travel on public transport were to go to work, to education/training or for shopping.[2] However forty nine percent of the population over 16 years of age did not use one of these services.

Over the last year the total number of passenger journeys[1] has risen by 1.8% to 130.7 million, reversing the historic decline on usage. Fare-paying passenger numbers rose again by 2.8 million (3.8%) to 75.8 million, ENCTS increased by 0.6% to 37 million and child concessionary travel was down by nearly 7% to 17.8 million.

People continue to travel for the same three main reasons; to get to work, to go to education/training or for shopping where they can spend up to £30 per return trip. The range of services offered is not comprehensive and uniform across South Yorkshire with issues identified around the network, the ticket offer and cost of travel and information and promotion. Key gaps and challenges include:[2]

- Places that people can get to on the current public transport network
- Quality and service performance of the public transport
- Varied ticket offers but not easily understood and limited purchase options
- Confusing messages (public transport versus walking and cycling)
- Not communicating using 21st century methods[8]

There are a wide-range of actions that could be undertaken to improve public transport and the associated secondary products and services. However each of these actions varies in importance and value to the customer. Actions therefore need to be prioritised and balanced against cost and delivery capability.

Some of the potential actions that could be undertaken to improve the offer for the people of South Yorkshire are in development, such as increasing the methods of ticket purchase and moving more communication to cost-effective on-line and social media solutions. Some actions are included in a longer term strategy, for example extending the tram network, however such actions would only be of importance to specific areas of the county although they could show a positive business case. These are also PTE-centric deliverables and therefore under the PTEs control. The delivery of real change to the offer for all people can only be swiftly brought about by influencing the delivery of services with all partners and integrating PTE specific activities when and where necessary.

People want public transport to meet their needs and requirements, enabling them to adopt passenger travel as part of their lifestyle, now and into the future. To meet these needs and drive passenger numbers means improving value for money for students/fare-payers, raising satisfaction and reducing costs of service delivery, where appropriate, in order to invest in implementing a comprehensive price competitive offer throughout the county to make public transport easier, quicker and more convenient.

Context

In recent years household income and jobs have both been constrained by falls in economic activity across South Yorkshire. In 2013 there was a small (0.5%) upturn in wealth created and a rise in the number of passengers on public transport, in particular fare-paying passengers using the bus[9]. The return to growth in fare-paying passenger travel and overall road traffic is expected to be further supported by a sustained rise in economic activity and employment which started last year and is forecast to continue in 2014.

South Yorkshire	2014 forecast	2013 actual	Forecast Change[v]	Change %
Overall Road Traffic[i]	6.07bn	6.05bn	+0.02bn	0.3%
Passenger Travel[ii]	130.7m	128.9m	+1.8m	1.4%
Economic Growth (GVA)[iii]	£23.5bn	£23.0bn	+£0.5bn	2.5%
Employment[iv]	0.62m	0.60m	+0.02m	2.6%

[i] *Car traffic accounts for 77% of overall motor vehicle traffic in South Yorkshire – vehicle miles (source: DfT)*
[ii] *Calendar year (source: Strategic Intelligence and Performance SYPTE)*
[iii] *Figures provided by the Centre for Economics and Business Research (CEBR) and SIP/SYPTE*
[iv] *Figures provided by Nomis, persons aged 16-64, YE Sept 2013*
[v] *Change is measured by comparing 2013 actual and 2014 forecast values*

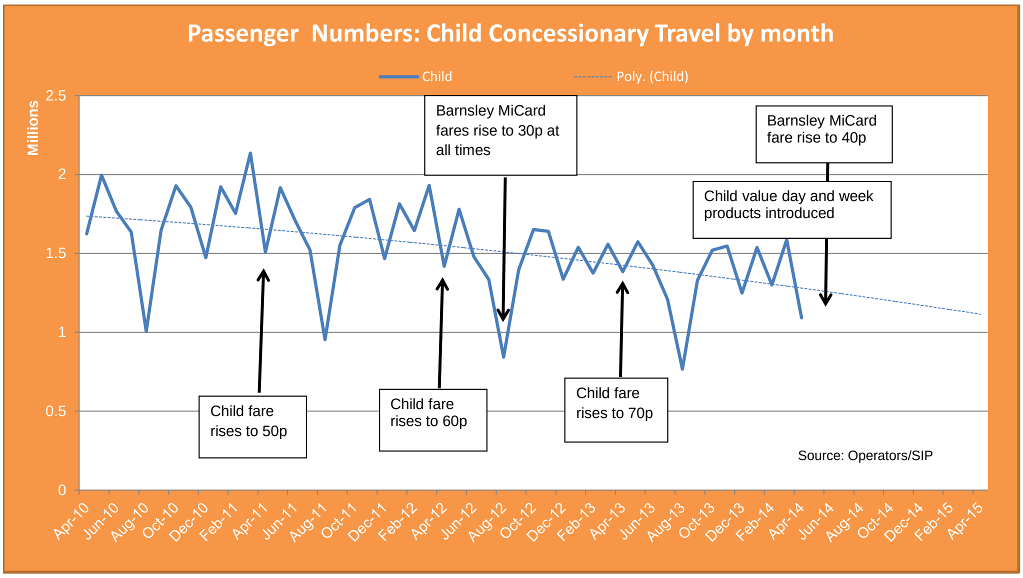
Passenger travel 2013-14
Last year the number of passengers travelling by bus, tram and train reached 130.7 million, an increase of 1.4% (1.8 million); this is a reversal of the historic downward trend in public transport travel.[1]

- Bus passenger numbers rose by 3.4% (3.6 million) to 108.5 million
    - Bus fare-paying passenger numbers reached 58.2 million, an increase of 7% (3.8 million) principally driven by improvements from the Sheffield Bus Partnership
- Tram usage fell for the third year in a row to 12.6 million
    - Overall tram travel is down 1.81 million compared to last year comprising;
        - Decline of 0.37 million in child travel (note: child travel had started to fall before fare increases introduced)
        - 1.0 million loss in travel due to impact of track replacement
        - The remaining 0.44 million is additional loss of fare-paying/ENCTS passengers and impact of BRT works
- Rail passenger numbers down by 50,000 (0.5%) to 9.5 million
    - Net impact of Hatfield landslip in 2013-14 is a decline of 47,000
    - Static/falling numbers on key lines such as Sheffield-Nottingham and Sheffield-Leeds
    - Prior to this year overall numbers travelling on the franchise had been growing so this is a significant shift
- Service Performance[3]
    - Bus, Tram and Rail punctuality and reliability performance is generally on a long term upward trend, reflecting investment on-street and challenging operators' underperforming services

Child Concessionary and Youth Travel:
The child concessionary and youth travel market comprises free travel, concessionary travel on commercial and schools services, student and discount travel for 16 to 25 year olds.

Since 2010, child concessionary travel across commercial and school services has declined by 4.98 million to 17.78 million trips a year, a fall of 21.9%.[10] The overall trend is downwards across all areas of South Yorkshire with the largest decline in numbers being recorded in Sheffield. This has been partly driven by significant and continued falls in numbers travelling on the tram network, a decline which pre-dates the first concessionary fare increases. There is no simple explanation as to the cause at this point in time, although combined work to understand the issue and potential mitigation between Supertram and the PTE continues to be undertaken.

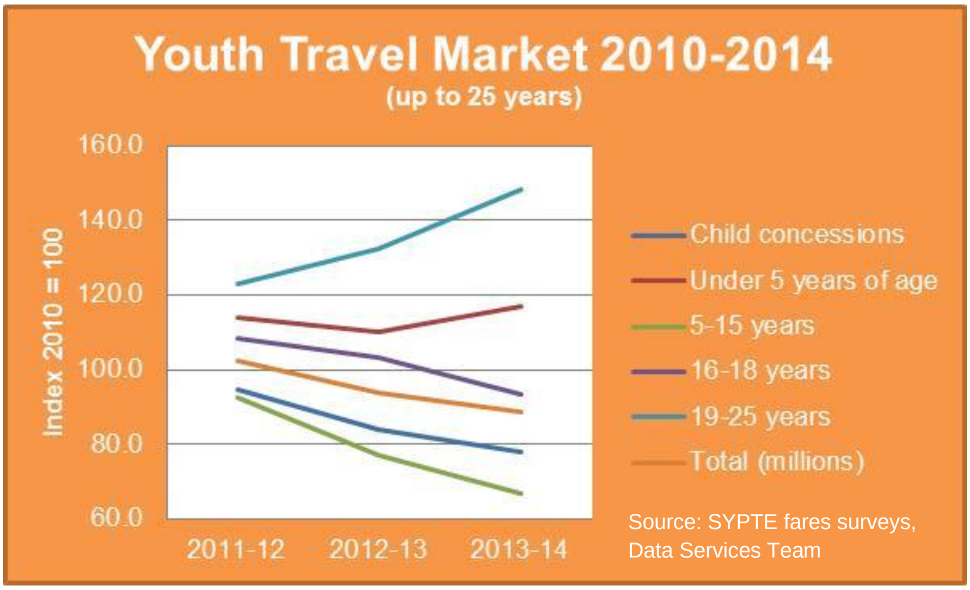
The trend will continue as the level of financial support for concessionary travel is continuing to be changed and will be replaced by a wholly commercial offer in 2017-18. However value for money child travel tickets were launched in March 2014. This may raise passenger numbers in this market following the success of the discounted offer to 19-25 year olds which delivered growth of nearly 12% in 2013-14.[11]



Between 2010 and 2014, passenger journeys on the commercial network covering travel by young people aged below 5 to and up to 25 showed a smaller decline of 11.1% to 20.75 million journeys, and within that some categories recorded growth.

		2010-11	2011-12	2012-13	2013-14
School and commercial services	Child concessions (millions)[i]	22.76	21.55	19.08	17.78
Commercial services[ii]	Under 5 years of age	3.83	4.37	4.21	4.48
	5-15 years	12.27	11.35	9.49	8.20
	16-18 years	4.87	5.28	5.02	4.56
	19-25 years	2.37	2.91	3.14	3.51
	Total (millions)	23.34	23.91	21.87	20.75

[i] *Source: Operators* [ii] *Source: SYPTE fares surveys*



Fare-paying travel
There are over 691,000 people in South Yorkshire between 25 and 64 years of age representing 51.5% of the population.[6] This sector includes discount travel for up to 29 year olds seeking work, commercial operator and multi-modal tickets. Last year fare paying travel rose 2.8 million to reach 75.8 million (+3.8%), driven by growth in fare-paying bus passengers principally in Sheffield linked to the SBP.[1] Both rail and tram saw declines in the overall number of fare-paying passengers.

Fare-paying[i]	All	Bus	Tram	Rail
2013-14	75.8	58.2	8.4	9.18
2012-13	73.0	54.4	9.5	9.22
Change (m)	+2.8	+3.8	-0.9	-0.04
Change (%)	+3.8%	+7.0%	-9.5%	-0.4%

[i]*Source: Operators, Strategic Intelligence & Performance, Data Services Team*

Older people and mobility impaired (ENCTS travel)
This is the smallest of the three segments by number, with older people (65 years of age and above) representing 16.5% of the population in South Yorkshire.[6] However, this sector is a major user of the public transport network with a market share of 28.4% in 2013-14.[10]

ENCTS[ii]	All	Bus	Tram	Rail
2013-14	37.06	33,88	2.82	0.36
2012-13	36.84	33.23	3.24	0.37
Change (m)	+0.22	+0.65	-0.42	-0.01
Change (%)	+0.6%	+2.0%	-13.0%	-2.7%

[ii]*Source: Operators, Concessions and Ticketing, Strategic Intelligence & Performance, Data Services Team*

Customer needs

The main reasons for travelling, to go to work, education/training and shopping remain unchanged, although there are slight variations between the three main segments.[12] Each of these activities raises key issues and challenges. The development of this report on people travelling in South Yorkshire has been informed by a significant evidence base.

This insight has highlighted key issues which need to be resolved in order to increase people's usage of public transport. The current primary issues/needs identified to improve public transport are in the following areas:

- Network and service provision
- Ticketing and value for money
- Information and promotion

Key gaps and challenges include:[2]

- Places that people can get to on the current public transport network
- Quality and service performance of public transport network
- Varied ticket offers but not easily understood and limited purchase options
- Confusing messages (public transport versus walking and cycling)
- Not communicating using 21st century methods[8]

Customer offer

Customer offer:
The range of services offered is not comprehensive and uniform across South Yorkshire. Rail is fixed in terms of the current corridors it serves with only incremental additions and improvements, such as additional carriages and car parking, being introduced during the year. Tram is also fixed in terms of its offering within Sheffield. Bus is capable of being more variable in terms of potential offering. However since 2007-08 the total number of bus vehicle kilometres operated has declined in every district other than Barnsley, which in part accounts for the decline in patronage.[13]

The operating performance of the services overall is satisfactory[3] (e.g. the reliability and punctuality of services operated) and the majority of customers are satisfied with the service provided; as all modes have a satisfaction rating of over fifty per cent and on a general upward trend. However both value for money and net promoter scores are low, people aged 25-34 years of age have significantly lower satisfaction ratings than average and infrequent and non-users are also much less satisfied with the current offer.[4]

Child Concessionary and Youth Travel:

- **Travel for under 5 years of age:** Free travel is offered for under 5 year olds throughout South Yorkshire. The number of journeys undertaken on the commercial network has risen by 17% to 4.48 million over the last four years.[11] The key drivers of usage here are mum and dad wanting to make trips and being able to do so on public transport.[14]
- **Travel for 6-13 year olds:** There are two main public transport service offers to this age group. The first is a school service which although is free or subsidised is generally regarded as poor quality. The second is the commercial offer which is also used for school/education trips and also for non-school trips.[14] Once this age group (and other school/education aged groups) has chosen to use public transport then timekeeping (punctuality, reliability) is the critical factor. Other key areas to address are bus driver attitude/customer service and the behaviour of other child and non-child passengers. The information offer includes the on-board website which is available as a teaching/information resource. Usage is not high and feedback is being used to drive new developments.
- **Travel for 14-16 year olds:** As with the previous age group there are two main service offers, school and commercial services. However this group has more of a voice in choosing the mode of transport and will make more out-of-school trips. A common need is to visit friends, often this is currently achieved by walking or being a

car passenger. The preferred method of travel is car but critical to choosing public transport is whether it goes to where they want it to go, and at a reasonable cost.[14]

- **Travel for 16-18:** Access to education remains a critical factor for this group but travel for other reasons begins to increase, as a result the experience of public transport begins to move towards the commercial rather than the school offer. Where the public transport network reaches becomes more important and use of public transport is primarily within their choosing. Most young people aspire to become a car user and/or owner as soon as possible. Overall the cost of travel is a key element whilst once this age group has chosen to use public transport then timekeeping (punctuality, reliability) is the critical factor.[15]

Fare-paying travel

This is the fastest growing segment of the public transport travel market[1] despite satisfaction with bus and tram being the lowest of the three segments.[4] Satisfaction is particularly low for the 25-34 year old age group for the bus service (41%) and value for money of rail, tram and bus (32%, 28% and 23% respectively). The commercial offer for fare-paying travel varies by district and operator and there is a distinct offer for those entering the work market aged 25-29 years around discounted travel (new deal etc.).[16] Information as to where and what the network/service can offer is a major requirement.[2]

Older people and mobility impaired (ENCTS travel)

The offer to this group is evolving as limitations to usage were introduced and then some restrictions relaxed. Information and promotion play a key role for this group.[2]

Current position

In 2012 South Yorkshire wide research showed that for those who currently have concessionary passes 45.8% would most like to renew their passes by telephone, 38.6% wanted to do it online and 15.7% using a self-serve machine or kiosk.[17] Given these options there is a significant appetite for people not to interact face-to-face. Similarly, nine in ten customers said the removal of paper timetables would not change the frequency of their travel.[18] These results are primarily for current customers, there is a significant proportion of the South Yorkshire population who do not currently interact with the existing offer at all.[19]

The range of the public transport offer is quite wide for people within South Yorkshire. However there are clear key gaps and challenges around the network, services and facilities, ticketing, information and promotions which continue to be raised.

Tackling the key issues/problems

To tackle the key issues/problems there are a wide range of actions that could be undertaken. However, critical to the delivery of a future roadmap of changes to the services and any new developments is to agree the key objectives. Driving concessionary travel is unlikely to be a key ambition on affordability grounds and for the same reason neither is changing the cost structure underpinning school service quality.

Some of the potential actions that could be undertaken to improve the offer are in development, such as increasing the methods of ticket purchase and moving communication to more cost-effective on-line and social media solutions. Some actions are included in a longer term term-strategy, for example extending the tram network, however such actions would only be of importance to specific areas of the county although they could show a positive business case. These are also PTE-centric deliverables and therefore under the PTEs control. The delivery of real change to the offer for people can only be swiftly brought about by influencing the delivery of services with all partners and integrating PTE specific activities when and where necessary.

The future offer

The development of the future offer needs to be prioritised by impact/cost and segmented by actions that are under direct control and those that are to be delivered through partnership work. Therefore, for the PTE, the key action would be to influence change.

Key outcomes

There is no change to the list of priorities and key outcome as highlighted in the last review (Customer Strategy Part 2 July 2013) from this update:

Priority Level:		**Customer Issue:**
High	-	Service punctuality and reliability
	-	Frequency: provision that matches customer needs and demand
	-	Network coverage: provision that matches customer needs and demand
	-	Ticketing that is affordable, easy to understand and purchase
	-	Value for money fares
	-	Information that is reassuring
	-	Personal security
	-	Journey time / speed
	-	Ease of information accessibility
	-	Ease of information understanding
	-	Relevant information & communications
	-	Boarding & interchange points that are easy to use
Medium	-	On vehicle seating / comfort
	-	Driving style
	-	Driver attitude
Low	-	Interchange and bus stop facilities
	-	Vehicle and facility cleanliness
	-	Driver appearance

Actions:
The key actions arising from the customer priority rankings are:

- Seek network, service and facilities changes in response to customer needs; including for non-users
- Develop plans and options to improve poor performance with operators and partners
- Simplify ticketing, improve ease of use
- Influence operators to manage pricing: seeking opportunities to improve affordability
- Deliver new information and ticketing options
- Monitor complaints, capacity and contributory factors

Prioritising customer issues, actions and resources

There is a wide range of actions that could be taken to improve public transport and its associated support structures. However, each of these actions varies in importance and value to the customer. As such, these actions need to be prioritised in accordance with the impact that may be achieved, and then balanced by cost, value for money and resource capabilities within our organisation.

The priority list of customer issues must therefore continue to be developed, in turn providing guidance for the allocation of resource across the organisation in response to actions identified to overcome each issue. This priority list is a live document, and regularly updated as customer observations, feedback and research outputs are generated and analysed.

Given that SYPTE ultimately aspires to increase patronage of public transport modes in the South Yorkshire region, in order to help reduce dependency on the car and thereby make bus travel more sustainable, affordable and accessible alongside helping to reduce pollution and congestion. Issues that prevent customers from considering or using public transport must be of greatest priority to address. Thereafter, issues that impact upon levels of satisfaction with a product or service must be tackled, noting that under 'satisfaction' fall a multitude of different components (such as accessibility, reliability, punctuality, safety, etc.)

To understand which factors a) fundamentally affect the propensity to use public transport, and b) fundamentally affect levels of satisfaction with products and services received, customer research is required. The tracking of customer ratings of these factors allows us to identify which issues are of greatest need of improvement, and hence require attention and resources allocated to actions identified.

This Part 2 of our Customer Strategy shows where customer experiences and attitudes have been measured. These issues are then classified into three priority categories, based on the Three Pillars.

The order of priority was also driven by customer segmentation and aspects such as journey purpose/frequency of use (particularly work journeys and access to employment), thereby focusing on aspects which aid customer retention and drive customer conversion where there would be financial benefits and potential increases in patronage. In addition to the above, resource capability within the organisation was also taken into consideration, as was the success of project(s) carried out since the last Strategy was written; this includes the Sheffield Bus Partnership.

The Three Pillars: Focusing customer issues, actions and resources

(Source: SYPTE Information/Pragma)

In order to focus the customer issues and key actions they have been divided into three prioritised Customer Pillars; this in turn will then direct other strategies.

Pillar 1: Public Transport Network, Service & Facilities

PUBLIC TRANSPORT NETWORK, SERVICES & FACILITIES

Pillar Objective

To work with operators to provide an inclusive customer focused public transport system that caters to the varying needs and expectations of our customers

Customer Issues	Key Actions
• Service punctuality and reliability • Frequency: provision that matches customer needs and demand • Network coverage: provision that matches customer needs and demand • Personal security • Journey time / speed • Boarding & interchange points that are easy to use • On vehicle seating / comfort • Driving style • Driver attitude • Vehicle and facility cleanliness • Interchange and bus stop facilities • Driver appearance	• Monitor complaints, capacity and contributory factors • Challenge poor performance with operators • Assess and respond to varying customer segment needs • Respond to land use changes and businesses' needs to improve network • Seek network changes and also stability where appropriate • Reduce cost of operation • Improve accessibility to diverse groups • Driver academy • Initiatives to improve safety

Key Achievements to date

- Worked in partnership with operators to refine the extent, quality and accessibility of the public transport network particularly in the Sheffield Bus Partnership and soon to be launched Rotherham Bus Partnership

Key highlights:

- Satisfaction with local tram service has fallen from 80.9% to 67.7% over the period of the track replacement works[4]
- Satisfaction with local bus services for those aged 25 to 34 years is 41%[4]
- Satisfaction with bus runs at the time you want (56.8%), bus services go where you want to go (60.6%) and the bus takes you directly where you want to go (53.8%) have all declined by around 5 points compared to May 2013[4]

Pillar 2: Public Transport Ticketing & Affordability

PUBLIC TRANSPORT TICKETING & AFFORDABILITY

Pillar Objective

To provide customers with a ticketing solution that meets their needs and expectations including concessionary travel

Customer Issues

- Ticketing that is affordable, easy to understand and easy to purchase (especially train)
- Value for money fares, especially multi-operator products

Key Actions

- Simplify ticketing, improve ease of use
- Introduce and refine smartcard solution
- Explore wider ticketing retail network considering digital, self- serve and third party channels
- Influence operators to manage pricing: seek opportunities to improve affordability

Key Achievements to date

- Begun the process of rolling out a smartcard ticketing solution that will revolutionise ticketing in South Yorkshire
- New ways to deliver ticketing and information products and concession passes to improve accessibility and increase cost effectiveness
- The launch of Citywide and Rotherham Connect and influencing operators to reduce ticket prices in Doncaster, Rotherham and Sheffield
- Introducing day and week child tickets offering travel at prices as low as £5 per week

Key highlights:

- Satisfaction with value for money on rail is 40.0%, tram 43.0% and bus 39.3%[4]
    - For those aged 25-34 years of age, satisfaction with value for money on rail is 32%, tram 28% and bus 23%
    - The most satisfied with value for money live in Barnsley (45%), followed by Rotherham (44%) and Sheffield (40%). People in Doncaster record the lowest satisfaction rating of 31% driven by the relatively high ticket cost and poorly perceived service performance
- Young people's travel[14]
    - Confusion over what Megatravel and MiCard passes are
    - Tram disliked as not good value for money
    - Buses are cheap, easy and simple
- For those who currently have concessionary passes 45.8% would most like to renew their passes by telephone, 38.6% wanted to do it online and 15.7% using a self-serve machine or kiosk[17]
    - Traditional ticket types and payment methods need to be complemented by new products and new technology

Pillar 3: Public Transport Information & Marketing

PUBLIC TRANSPORT INFORMATION & PROMOTION

Pillar Objective

To provide customers with the information they need to travel comfortably and confidently, and promote the benefits of public transport

Customer Issues

- Ease of information accessibility
- Ease of information understanding
- Relevant communications
- Information that is reassuring
- Relevant information & communications
- Boarding and interchange points that are easy to use

Key Actions

- Promotion of live information
- Clarity and consistency of information provision, especially of fares
- Targeted education (segment-specific)
- Encompass latest affordable technological developments
- Influence operators

Key Achievements to date

- Planning the launch of self-serve options
- Delivering strategic planning for channel migration and customer management
- Improved capability to deliver new technological solutions to meet more efficiently and effectively current and future customer needs

Key highlights:

- Satisfaction with public transport information overall is 56%[4]
  - Non-users (especially bus) are significantly less likely to be satisfied with the current information offer than average
  - Bus users' satisfaction with information has changed only marginally in the last year from 60.5% to 59.5%
- Nine out of ten bus users said the removal of paper timetables would not affect their use of the service[18]
  - Electronic displays showing actual departure times would encourage a significant increase in bus trips; but only if they are accurate

Performance

Performance has been updated with the latest information available as at May 2014 (baseline 2012).

Measure		Baseline	2013	Current	Change /trend	Reference
Patronage	Bus Rail Tram	111m 9.2m 14.9m	105m 9.6m 14.4m	108m 9.5m 12.6m	⇧ ⇩ ⇩	SYPTE SIP, DST *(2011-12, 2013-14)*
Punctuality	Bus Rail Tram	90.0% 94.2% 95.8%	90.3% 95.8% 93.8%	89.6% 91.8% 96.1%	⇔ ⇩ ⇔	SYPTE SIP, DST *(Current: Bus, Rail & tram 2013-14)*
Reliability	Bus Rail Tram	98.3% 100% 100%	98.8% 100% 97.5%	98.0% 98.5% 99.6%	⇔ ⇔ ⇔	SYPTE SIP, DST *(Current: Bus, Rail & tram 2013-14)*
Average cost of fares	<u>Bus</u> Barnsley Doncaster Rotherham Sheffield	 £1.64 £1.70 £1.72 £1.42	 £1.70 £1.65 £1.85 £1.31	 £1.84 £1.90 £1.82 £1.58	 ⇧ ⇧ ⇩ ⇧	SYPTE DST Scaled data (Annual average 2011/12. *Current: May 2014)*
	<u>Tram</u> Sheffield	 £1.72	 £1.75	 £1.72	 ⇩	
<u>Net Promoter Score</u>						
Local bus service overall	Overall Bus User Bus Non User	-35.6 NPS -28.4 NPS -73.4 NPS	-41.6 NPS -33.9 NPS -79.4 NPS	-30.9 NPS -19.0 NPS -60.7 NPS	⇧ ⇧ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Local rail service overall	Overall Rail User Rail Non User	-29.7 NPS +2.5 NPS -59.3 NPS	-35.7 NPS -17.4 NPS -52.1 NPS	-21.1 NPS +9.3 NPS -37.9 NPS	⇧ ⇧ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Local tram service overall	Overall Tram User Tram Non User	-12.0 NPS +14.8 NPS -44.6 NPS	-14.1 NPS +15.2 NPS -41.9 NPS	-16.8 NPS +33.0 NPS -33.5 NPS	⇩ ⇧ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
<u>Satisfaction</u>						
Local bus service overall	Overall Bus User Bus Non User	56.0% 58.5% 43.0%	52.2% 55.4% 38.6%	57.5% 60.6% 45.9%	⇧ ⇧ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Local rail service overall	Overall Rail User Rail Non User	70.6% 81.1% 61.2%	70.1% 80.9% 60.8%	70.9% 76.7% 66.1%	⇔ ⇩ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Local tram service overall	Overall Tram User Tram Non User	74.6% 93.6% 55.1%	73.1% 91.5% 56.9%	67.7% 83.6% 52.4%	⇩ ⇩ ⇩	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Value For Money with the local rail service	Overall Rail User	42.9% 47.6%	40.6% 49.0%	40.0% 47.7%	⇔ ⇔	SYPTE Travel Survey May

Measure		Baseline	2013	Current	Change /trend	Reference
	Rail Non User	38.7%	33.1%	32.8%	⇔	2014 *(Current: May 2014)*
Value For Money with the local tram service	Overall Tram User Tram Non User	46.3% 58.8% 55.1%	43.3% 56.5% 31.4%	43.0% 50.7% 37.7%	⇔ ⇩ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Value For Money with the local bus service	Overall Bus User Bus Non User	36.3% 38.9% 22.5%	38.2% 41.8% 22.6%	39.3% 43.1% 28.2%	⇔ ⇔ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Reliability of service	Overall Bus User Bus Non User	48.4% 47.7% 51.8%	43.3% 44.3% 38.8%	49.3% 50.2% 46.6%	⇧ ⇧ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Provision of public transport information overall	Overall Bus User Bus Non User	56.0% 47.7% 51.2%	51.6% 54.7% 38.8%	55.7% 59.5% 44.2%	⇧ ⇧ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Your security while travelling on the bus	Overall Bus User Bus Non User	70.2% 57.3% 53.2%	65.5% 68.6% 51.9%	67.3% 70.5% 57.6%	⇔ ⇔ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
Your personal safety when waiting at the bus stop	Overall Bus User Bus Non User	72.7% 73.3% 95.1%	74.5% 77.6% 59.6%	73.4% 76.1% 66.1%	⇔ ⇔ ⇧	SYPTE Travel Survey May 2014 *(Current: May 2014)*
The journey	Overall Bus Users	86%	83%	86%	⇧	Passenger Focus Bus Satisfaction Survey *(Current: Autumn 2013)*
Value for Money	Overall Fare paying passengers	65%	59%	68%	⇧	Passenger Focus Bus Satisfaction Survey *(Current: Autumn 2013)*
Punctuality	Overall Bus Users	75%	65%	76%	⇧	Passenger Focus Bus Satisfaction Survey *(Current: Autumn 2013)*

Changes/trends when greater or lower than +3 or -3 per cent)

Supporting documentation and source references

Supporting documentation

The development of this review has been informed by a significant base.

- **Current Customer Insight July 2014**
    - Summarising key information and updates on public transport and customers in South Yorkshire (a copy of this report is available by request)
- **Customer Comments Quarterly Update 2014 Q4**
- Other key data sources include:

Data/Information	Source
Passenger numbers by month, by local authority, by ticket type	Operators, Strategic Intelligence and Performance, Data Services Team
Service performance	SYPTE fares surveys, SYPTE Real Time Information Analysis, Strategic Intelligence and Performance, Data Services Team
Wealth and employment	Centre for Economics and Business Research (CEBR), ONS, Nomis, Strategic Intelligence and Performance
Cordon Counts (2013-14)	Data Services Team
Journey purpose surveys	Data Services Team
Customer retail testing - information and ticketing surveys (2012)	Strategic Intelligence and Performance, Data Services Team
Ticket sales and use	SYPTE Fares Surveys, Data Services Team
Average cash fares	SYPTE Fares Surveys, Data Services Team
Travel survey/Passenger satisfaction survey 2007-2014	Strategic Intelligence and Performance, Data Services Team
Satisfaction with Public Transport in South Yorkshire	SYPTE Travel Survey/Passenger Satisfaction, Strategic Intelligence and Performance, Data Services Team
National passenger surveys	Passenger Focus Bus, Tram and Rail Passenger Satisfaction Surveys 2013, National Travel Survey
Census (2001-2011)	Office for National Statistics (ONS)
Customer complaints by month, by local authority, by type of complaint	SYPTE customer comments
Households within access distance of the core bus network	Ordnance Survey, SYPTE SIS
Jobs within the core bus network	Inter-departmental Business Register, SYPTE SIS
Bus market share as percentage of vehicle miles	SYPTE SIS
Sheffield Bus Partnership Market Research – Impact on Behaviours	SBP 2013, 2014
Changes in numbers of households and cars 2001-2011	Office for National Statistics (ONS)
Behavioural change by segment	SYPTE customer segmentation 2012, 2013
Tram survey	Supertram and SYPTE 2014

Source references

[1] *Operators, Strategic Intelligence & Performance, Data Services Team*

[2] *SYPTE Journey Purpose Surveys, Travel Survey/Passenger Satisfaction November 2013 and May 2014; SYPTE Customer Retail Testing – Ticketing 2012; SYPTE Customer Retail Testing – Information 2012*

[3] *Bus punctuality and reliability, SYPTE fares surveys*

[4] *SYPTE Travel Survey/Passenger Satisfaction May 2014*

[5] *SYPTE Customer Comments 2013-14, 2014-15 Q1*

[6] *2011 Census by age by district: Usual resident population by single year of age, unrounded estimates, local authorities in the United Kingdom*

[7] *SYPTE Customer Strategy Part 2 July 2013*

[8] *SYPTE Customer Retail Testing – Information 2012; SYPTE Young People Research Nov 2013*

[9] *Centre for Economics and Business Research (CEBR) Economic Forecasts for Sheffield 2014, Strategic Intelligence & Performance Local Authority Forecasts 2014, Operators, Strategic Intelligence & Performance, Data Services Team*
[10] *Operators, Concessions and Ticketing, Strategic Intelligence & Performance, Data Services Team*
[11] *SYPTE fares survey, Data Services Team*
[12] *SYPTE Journey Purpose Surveys, SCR Travel Research 2013, Passenger Focus Bus Passenger Satisfaction Survey Autumn 2013*
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[14] *SYPTE Young People Research Nov 2013*
[15] *SYPTE Young People Research Nov 2013, SYPTE Travel Survey/Passenger Satisfaction May 2014, SYPTE Customer Segmentation Research 2012, 2013*
[16] *www.firstgroup.com, www.stagecoachbus.com, www.arrivabus.com, www.travelsouthyorkshire.com*
[17] *SYPTE Customer Retail Testing – Ticketing 2012*
[18] *SYPTE Customer Retail Testing – Information 2012*
[19] *SYPTE SCR Travel Research 2013, SYPTE Travel Survey/Passenger Satisfaction May 2014*