



West
Yorkshire
Combined
Authority

Tracy
Brabin
Mayor of
West Yorkshire

Residents' Perceptions of Transport Survey Summary 2024 Results

August 2024



Background

The West Yorkshire Residents' Perceptions of Transport Survey is one of several structured surveys that the Combined Authority manages alongside empirical evidence to monitor trends and inform decision making.

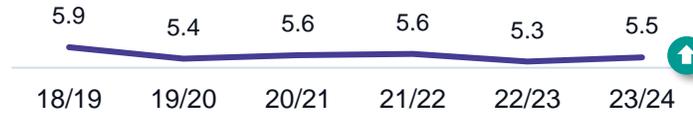
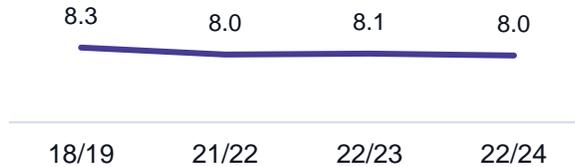
1,800 responses were gathered from January to March 2024 referring to the 2023/24 year. A mix of telephone (70%) and online panel (30%) methods were used to obtain a representative sample of residents, account for age, gender, district, ethnicity and disability status. Survey fieldwork was completed by independent research company, DJS Research, who compiled a report showing some of this year's results and comparisons with recent years. This report by the Combined Authority explores additionally detail of this long running survey series.

1. Satisfaction with affordability of public transport increases but little recent change in overall satisfaction with local bus and rail services

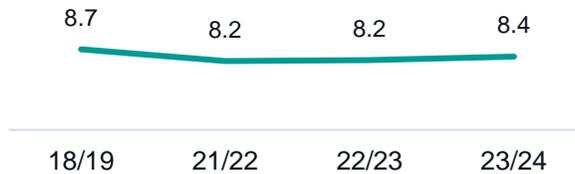
Importance to residents of ...

Satisfaction of residents with ...

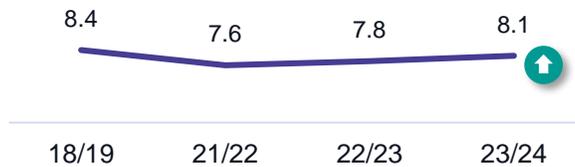
Affordability of motoring



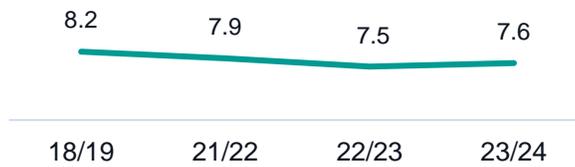
Affordability of public transport¹



Local bus services^{1,2}



Local train services^{1,2}



- Ratings for the importance of local bus services grew *significantly* since last year continuing an upward trend since the pandemic, whilst satisfaction remains similar to last year (up slightly to **6.0** out of 10).
- Satisfaction with the affordability of motoring and with the affordability of public transport both increased *significantly* compared to last year. The affordability of public transport hit a ten-year high at **6.5** out of 10. This may have been aided by the Bus Service Improvement Plan bus fare cap initiatives.
- Satisfaction with the affordability of public transport is higher amongst residents who use the bus at least once a week, **7.1** out of 10, up from **5.8** two years ago and **6.9** last year.

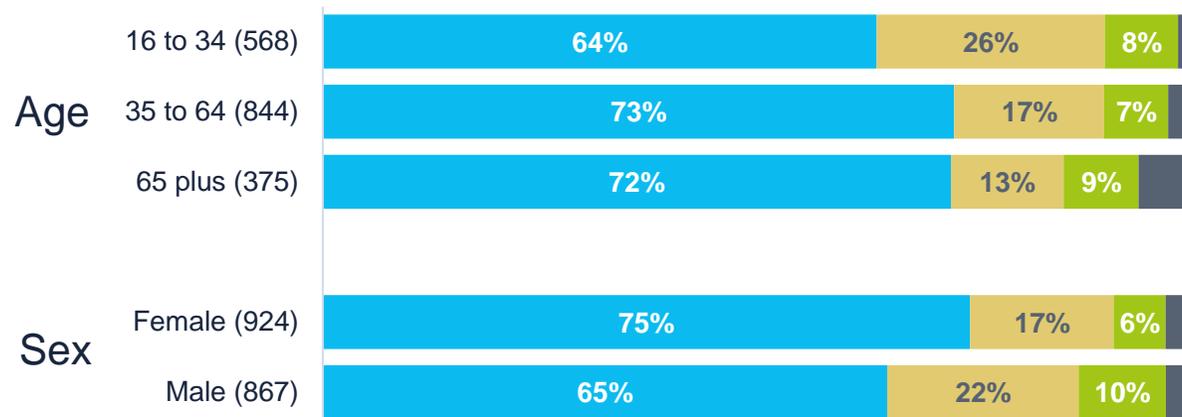
Significant difference compared to previous wave

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.

2. The importance of local bus service varies by demographic group

Importance of local bus services

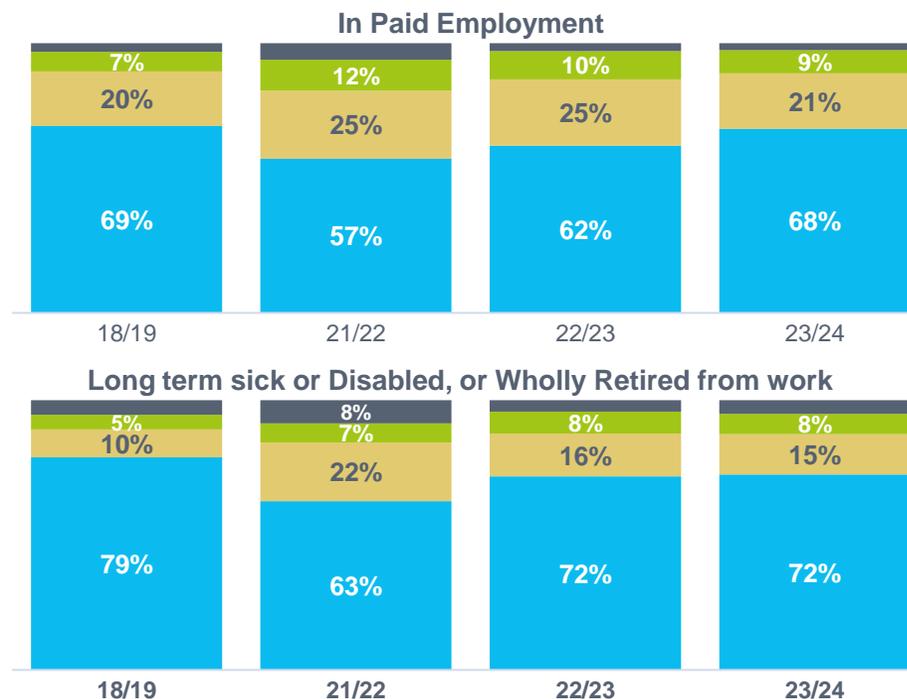
● Important ● Neither ● Not important ● Don't know



Stated importance of local bus services varies by demographic group. The following groups rated higher levels of importance for local bus services:

- Females
- Aged 35 to 64 and 65 plus
- Ethnic backgrounds other than White British
- Regular bus users (defined as those who use the bus at least once a week)

People in paid employment have increased their stated importance of local bus services, to reach levels similar to pre-pandemic. People who are long term sick or disabled, or wholly retired from work have consistently reported higher levels but are less likely to have changed their opinion in the 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)

3. Satisfaction with local bus stations appears unchanged overall but varies by district

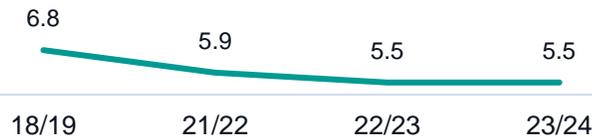
Importance to residents of ...

Satisfaction of residents with ...

The quality of your nearest bus station¹



Provision of cycle routes & facilities¹



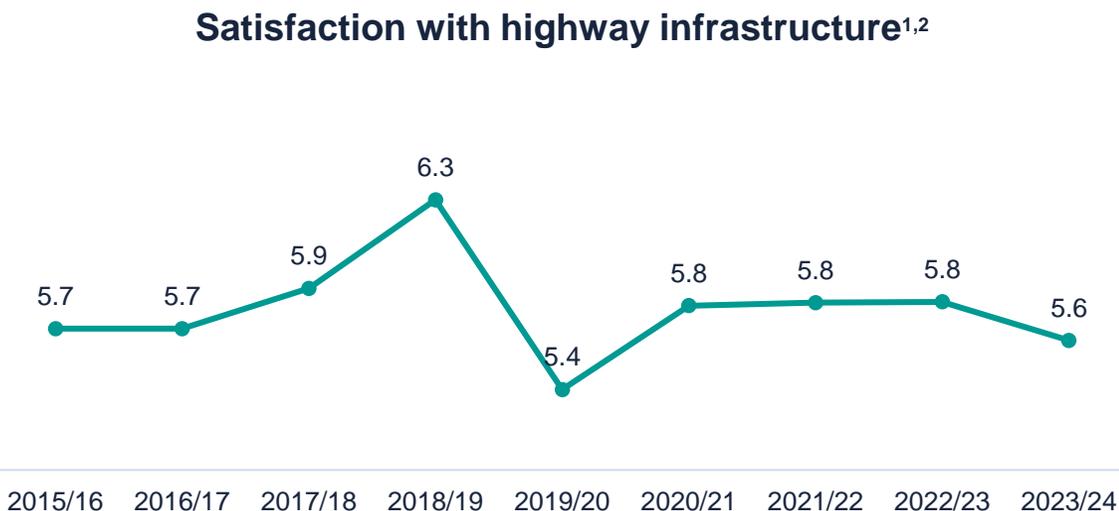
- Countywide satisfaction with the quality of local bus stations masks local variation; in Calderdale satisfaction with the local bus station increased from **6.2** to **7.2** out of 10, where the new Halifax Bus Station had partially opened. In contrast, satisfaction in Bradford district fell from **6.5** to **5.8** out of 10, where there Bradford Interchange has been closed since January 2024.
- Satisfaction with the provision of cycle routes and facilities has fallen slightly. The fall in satisfaction is most noticeable in age 65 plus, where satisfaction has dropped from **4.9** to **3.9** out of 10.

  Significant difference compared to previous wave

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

4. Overall satisfaction with highway infrastructure has reduced slightly

The West Yorkshire Transport Strategy 2040 set a target to increase overall satisfaction with transport infrastructure to **7.0** of out 10 by 2027, from a baseline of **5.7** 2016. The latest data shows a slight drop to **5.6**, after 3 years at **5.8**.



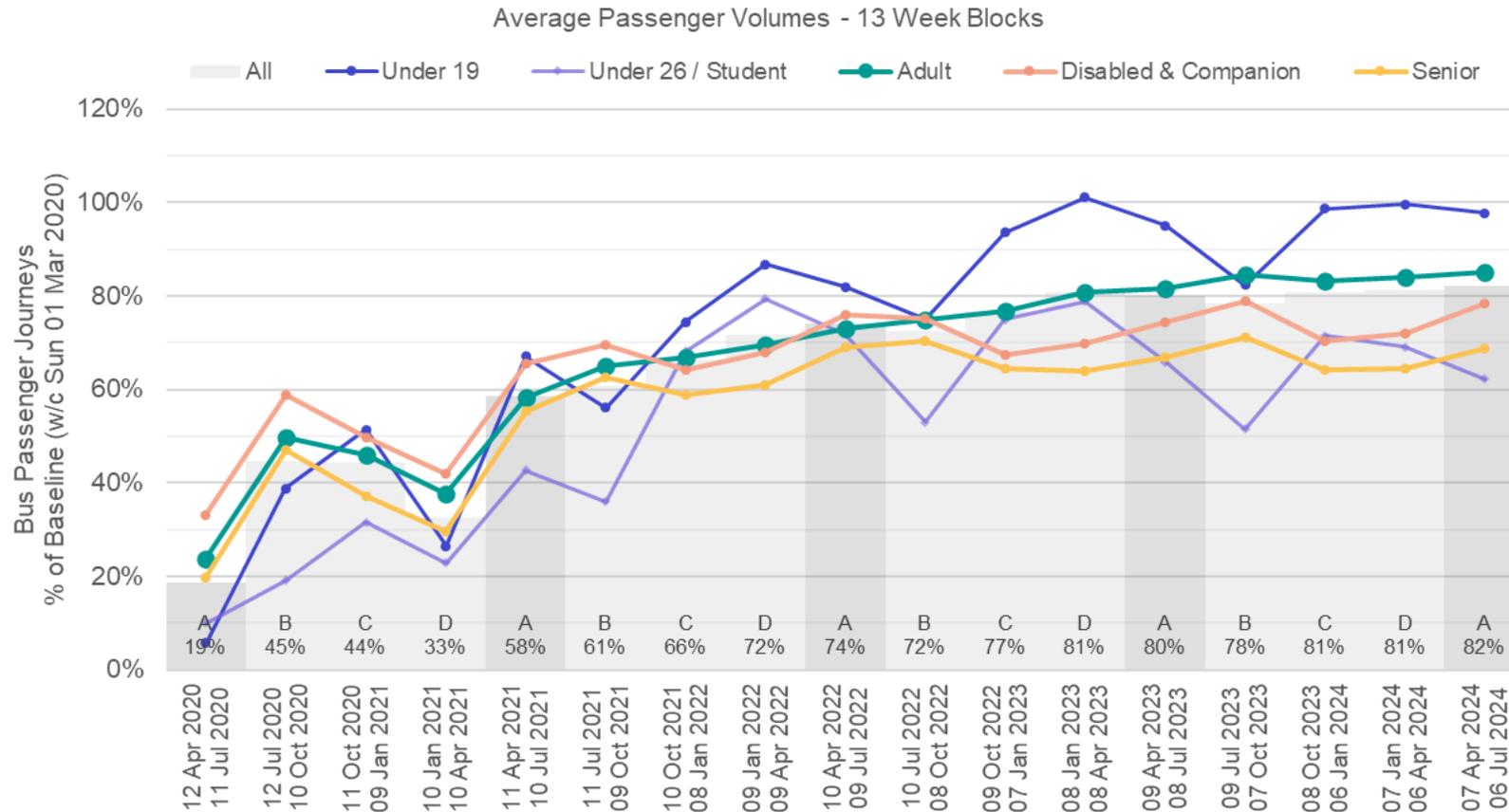
Overall satisfaction with transport infrastructure is a composite measure weighted by perceptions of importance. It comprises:

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

In some years there is rotation between which sub-questions are asked. In 2023/24 importance and satisfaction was asked about the five elements in **bold** and each of these showed a reduction in satisfaction.

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.

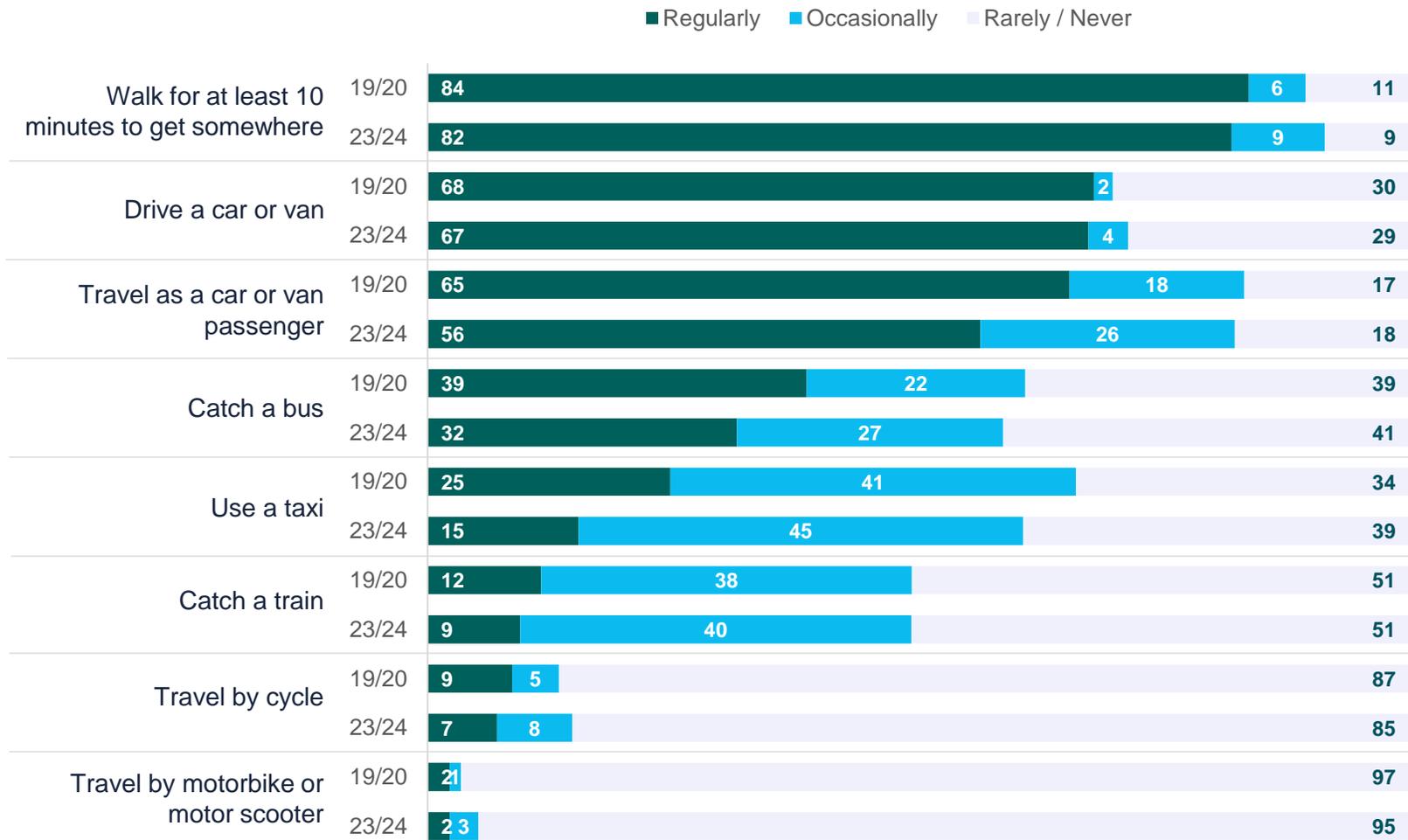
5. Empirical evidence shows increasing bus usage, though use has not reached the pre-COVID baseline.



- Empirical evidence shows a general trend of recovery bus use since the COVID restrictions, though the number of passenger boardings in West Yorkshire has not yet fully returned to the pre-COVID baseline.
- The chart on the left, illustrates that prior to the survey period, bus use had increased from 77% to 81% of baseline.
- At the time survey fieldwork was completed in 2023/24, patronage was similar to what it had been during the 2022/23 fieldwork, both being 81% of baseline.
- Note the graph on this page shows First and Transdev only, and transfer of services to or from other operators will have had a small impact on totals.

Source: Baseline period is w/c Mon 02 Mar. Source: Bus operators electronic ticket machine data, passenger boardings at locations in West Yorkshire. Graph shows First and Transdev data, with ticket types assigned to broad cohorts.

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

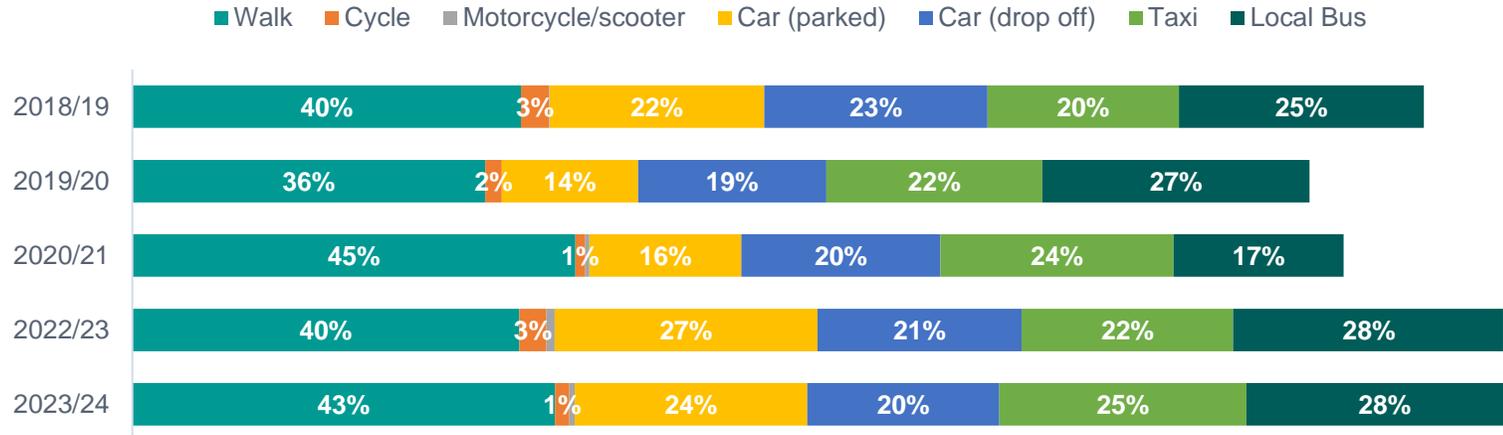


- **32%** of respondents reported regularly using the bus, up from **31%** last year, but still below pre-pandemic levels (2019/20 survey) when **39%** of respondents reported regularly using the bus.
- Over the last 2 years **38%** of those living in the most deprived quintile reported regularly using the bus compared to only **26%** of those living in the least deprived quintile.
- **9%** of respondents reported regularly using the train, down from **11%** last year, and also below the level of 2019/20 when **12%** of respondents reported regularly using the train.
- **82%** of respondents report regularly walk for at least 10 minutes to get somewhere, slightly down from the level in 2019/20 (**84%**).

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)

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

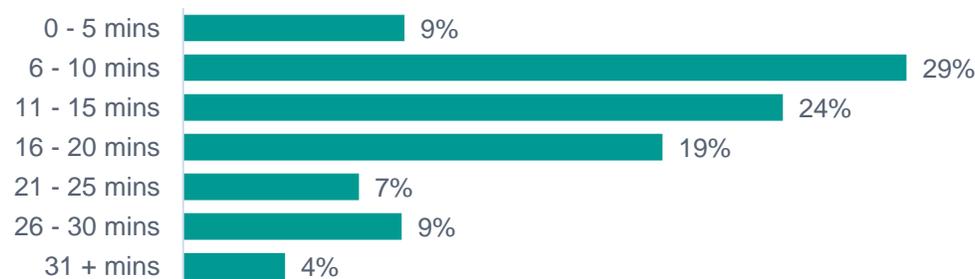
Usual method(s) used to and from local station



The survey included questions on how people travelled to the rail station when making a rail journey. The survey found:

- 44% of respondents reported either driving or getting 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 and at **28%** is similar to last year's survey.
- Combining the latest two years survey data shows that **61%** of the respondents who walked did so for up to 15 minutes. It also shows that regular train users are more likely to walk (**56%**) compared to occasional train users (**38%**).

Length of walk to/from rail station
(22/23 and 23/24 data combined)

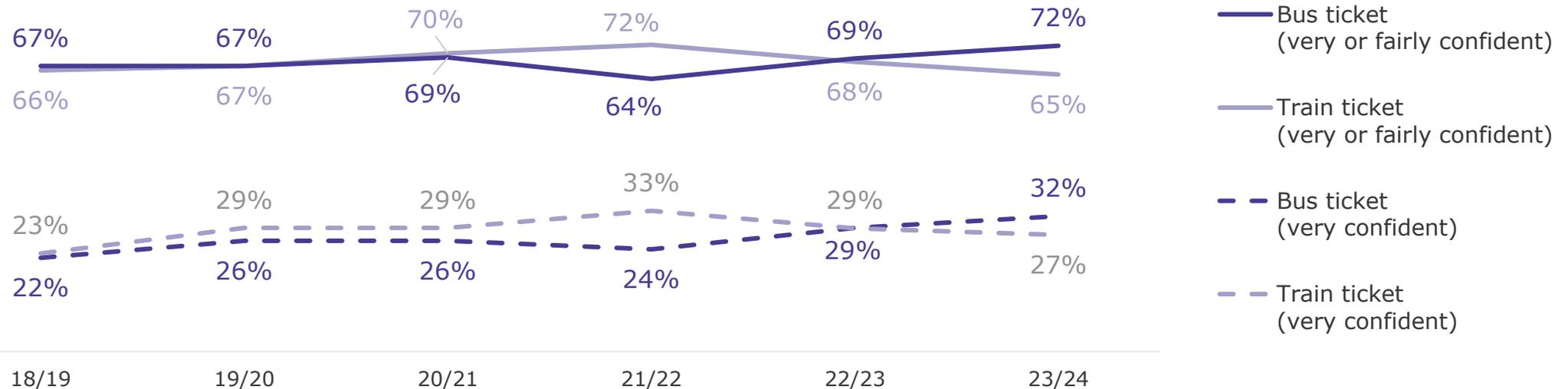


Source: Question C8. When travelling by train how do you usually get to and from your local rail station? Multi select question C8a. How long does this walk take? (Minutes)

Base: C8: Respondents who travel by train at least every 2-3 months (18/19 n=540, 19/20 n=748, 20/21 n=444, 22/23 n=936, 22/23 n=887). C8a: all respondents who walk to the rail station (n=756).

8. Confidence in purchasing the best value bus ticket continues to trend upwards while the reverse is true of train tickets

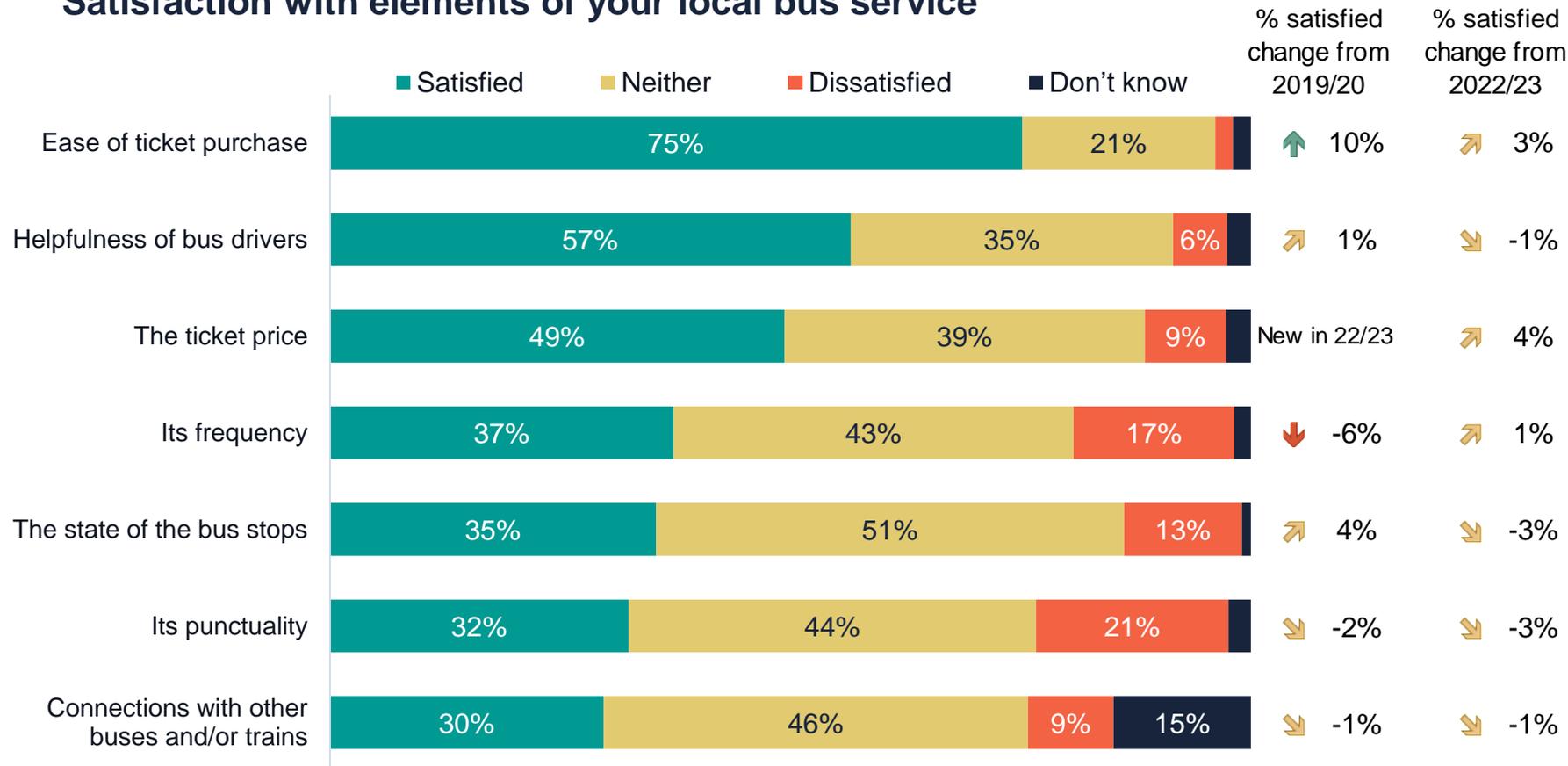
- 72% of respondents reported being either **very or fairly confident** that they usually purchase the best value bus ticket, **up from 69% last year and 64% in 2021/22**.
- Those aged **16-34 years old** and **regular bus users** were more likely to report being confident (**77% and 88%** respectively). For those aged 16-34 confidence buying the best value bus ticket increased from **26% to 33%** over the last 2 years.



Source: 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=1,380). E23. all respondents excluding don't know or have a train pass (n=1,673).

9. Satisfaction with the ease of local bus ticket purchase and price show improvement but other elements are mixed

Satisfaction with elements of your local bus service



- 75% of respondents reported being satisfied with the ease of buying a bus ticket, up from 72% last year, and up from 65% in 2019/20.
- 49% of respondents were satisfied with the ticket price (9% dissatisfied), up from 45% last year.
- Respondents who have a disability are less likely to say that they are satisfied with the helpfulness of bus drivers compared to those with no disability (50% cf. 58%).
- 25% of those who are employed full-time say that they are dissatisfied with the punctuality of bus services.

Source: Question M12 Regarding your local bus service, how satisfied are you with each of the following on a scale of 1 (very dissatisfied) to 10 (very satisfied)? For analysis 1-3 have been interpreted as dissatisfied, 4-7 as neither and 8-10 as satisfied.

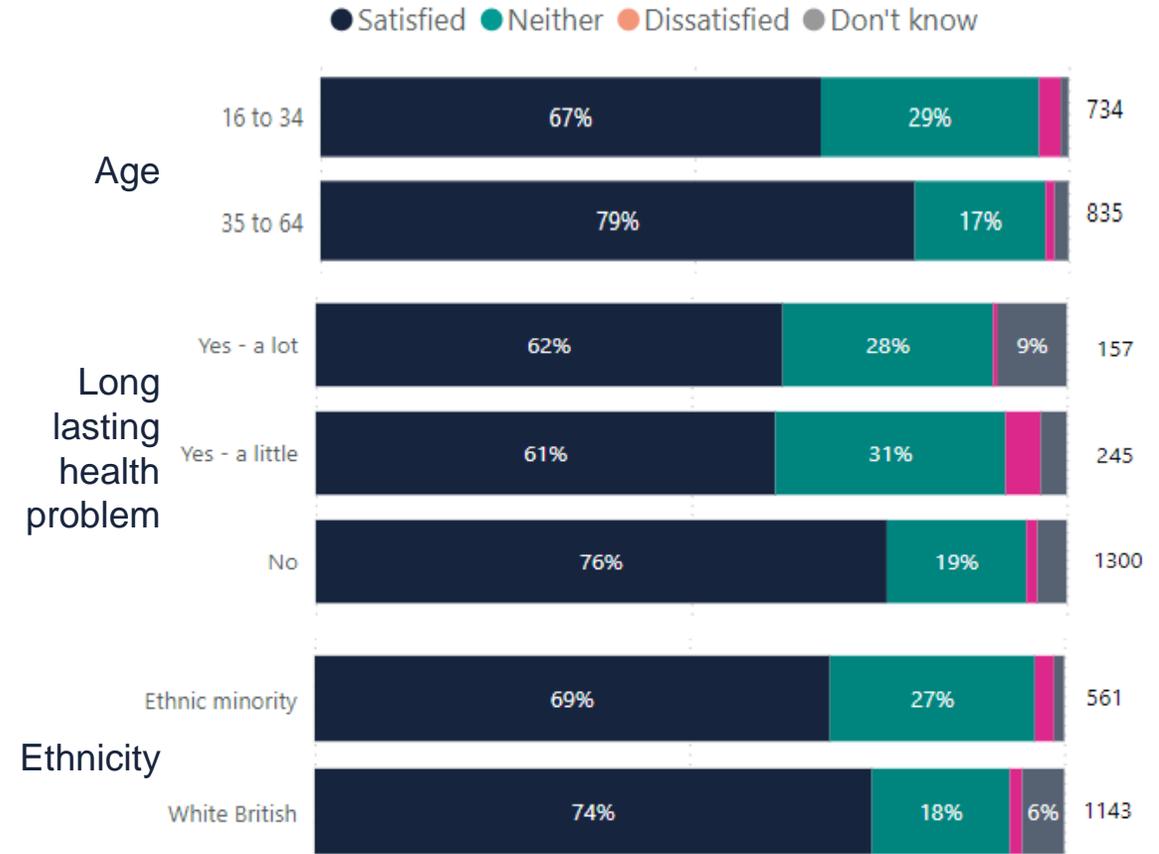
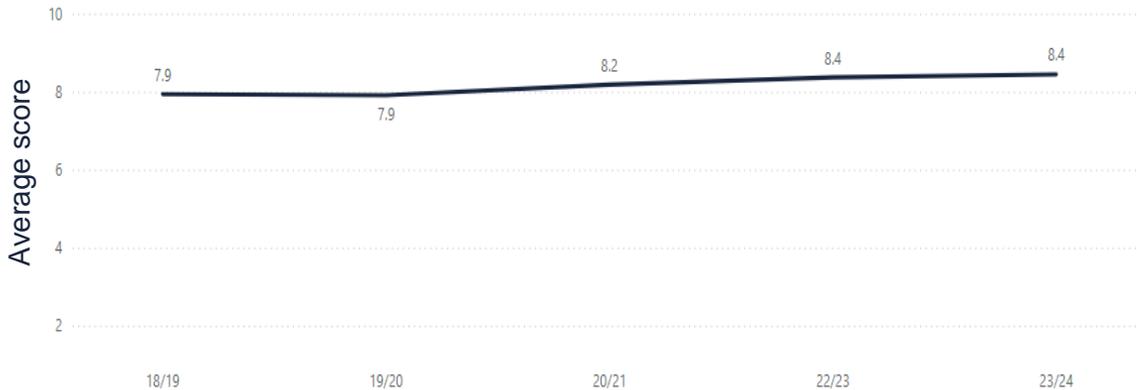
Base: All respondents who take a bus at least every 2 to 3 months (2023/24 n = 1055, 2019/20 n = 845) except for Ease of ticket purchasing and The ticket price which exclude respondents with a concessionary bus pass stated in question E11 (2023/24 n = 818, 2019/20 n = 623)

10. Satisfaction with the ease of purchasing a bus ticket

Average satisfaction scores for the ease of purchasing a bus ticket has held at **8.4** out of 10 in 2023/24, 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

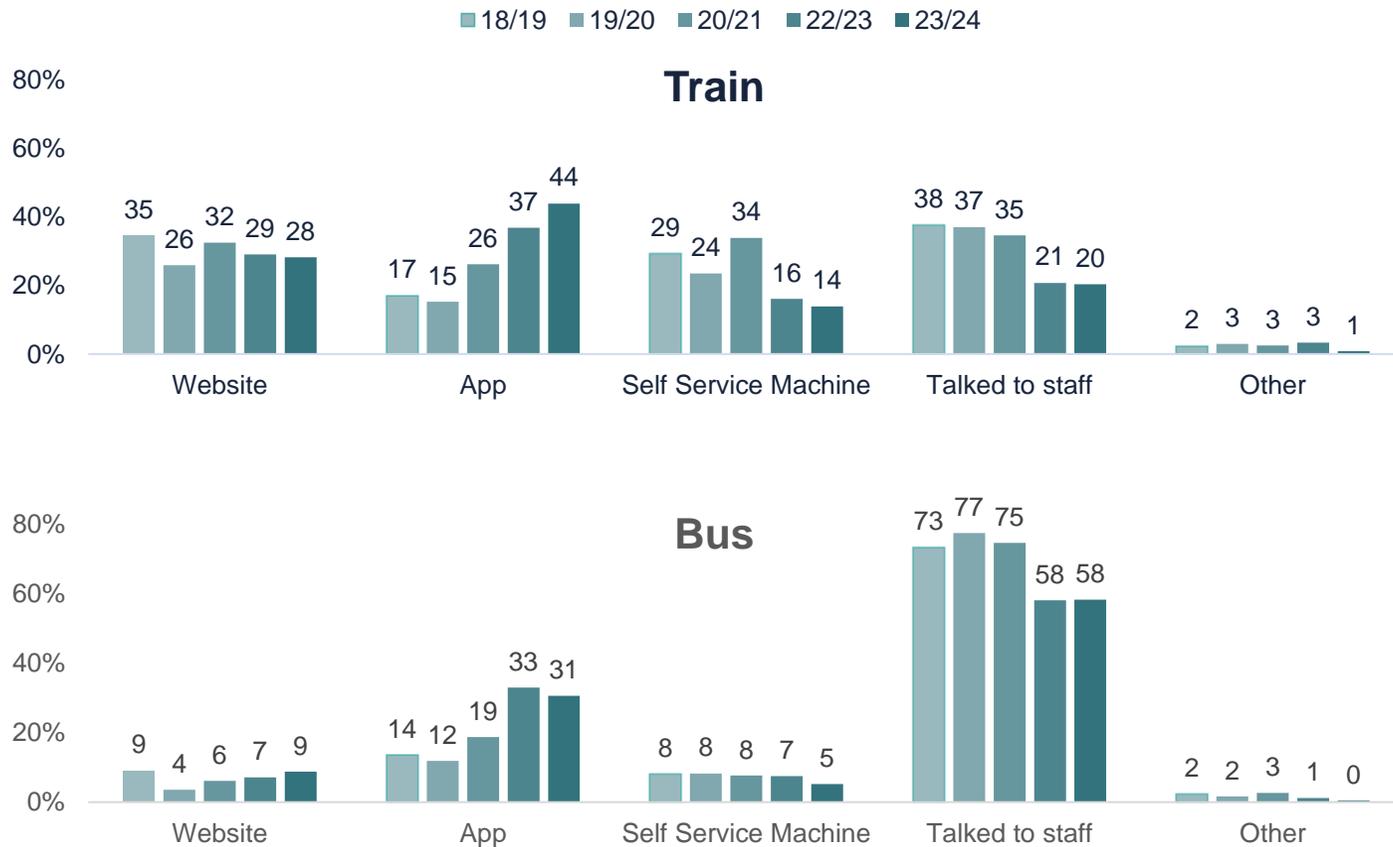
Satisfaction with ease of purchasing a bus ticket



Source: Question M12 Regarding your local bus service, how satisfied are you with ease of ticket purchase? 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: Respondents who take a bus at least every 2 to 3 months and excludes respondents with a concessionary bus pass stated in question E11. **Overall, 2018/19 n=609, 2019/20 n=848, 2020/21 n=464, 2021/22 not asked, 2022/23 n=902, 2023/24 n=818. Demographics use combined 2022/23 and 2023/24 responses, with base shown to right of each bar.**

11. 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, **69%** reported using an app or a website to do so (including 3% overlap who used both), although more traditional methods are still used also, with **20%** purchasing a ticket by talking to staff and **14%** through a self-service machine.
- Talking to staff is still the most used method for buying a bus ticket with **58%** of respondents buying their last ticket this way, however, this has fallen from **78%** in 2019/20. **31%** of respondents bought their last bus ticket using an App, a slight fall from last year (**33%**). Using an App to buy a bus ticket is popular among young people aged 16 to 34 (**35%**) and those from an ethnic minority background (**35%**).

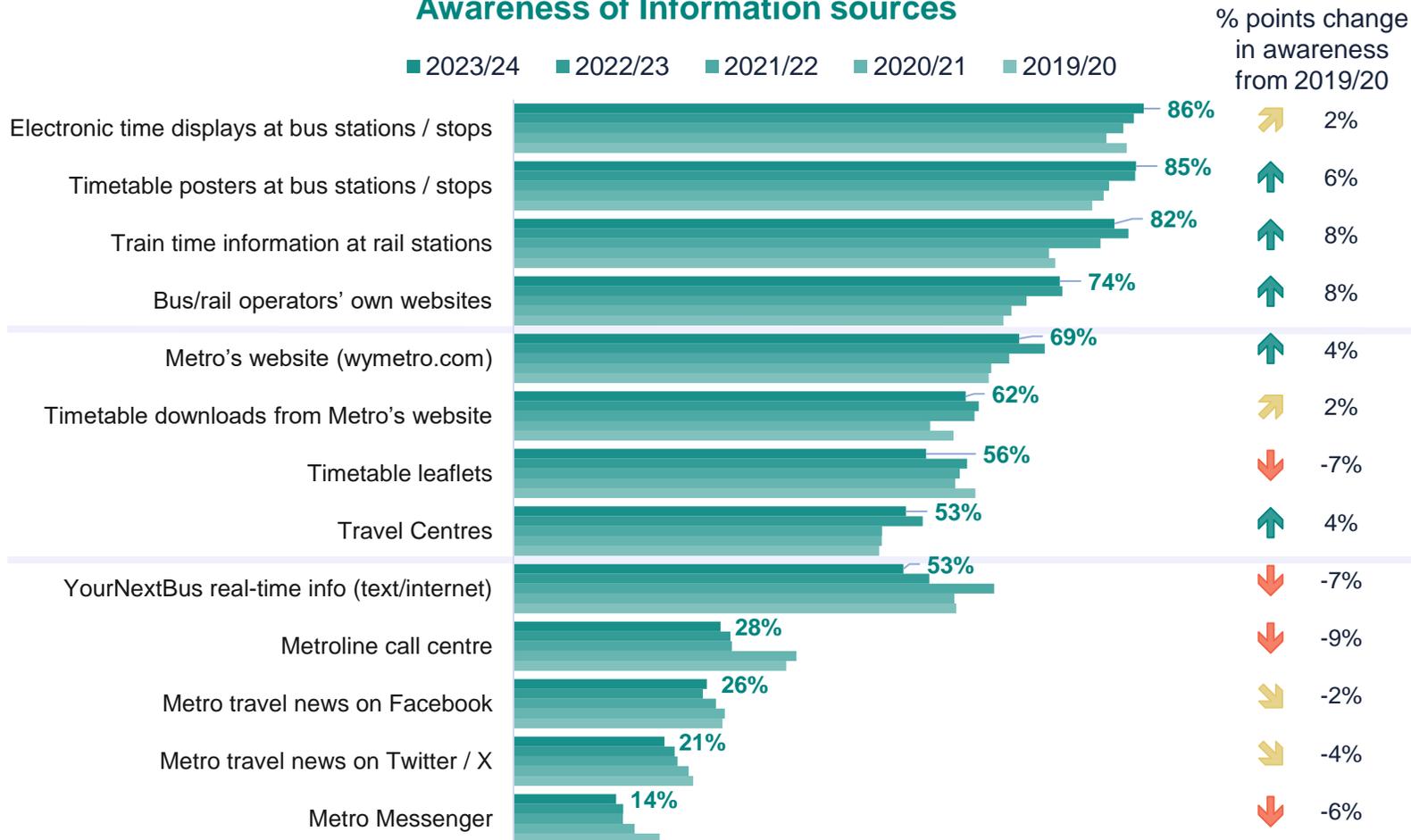
Source: Questions J11 What method did you use the last time you bought a train ticket? and K11 What method did you use the last time you bought a bus ticket?

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, 23/24 n=971)

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, 23/24 n=1179)

12. Results show an increased awareness of websites but a reduction for the Metro's call centre and multi-operator YourNextBus information

Awareness of Information sources

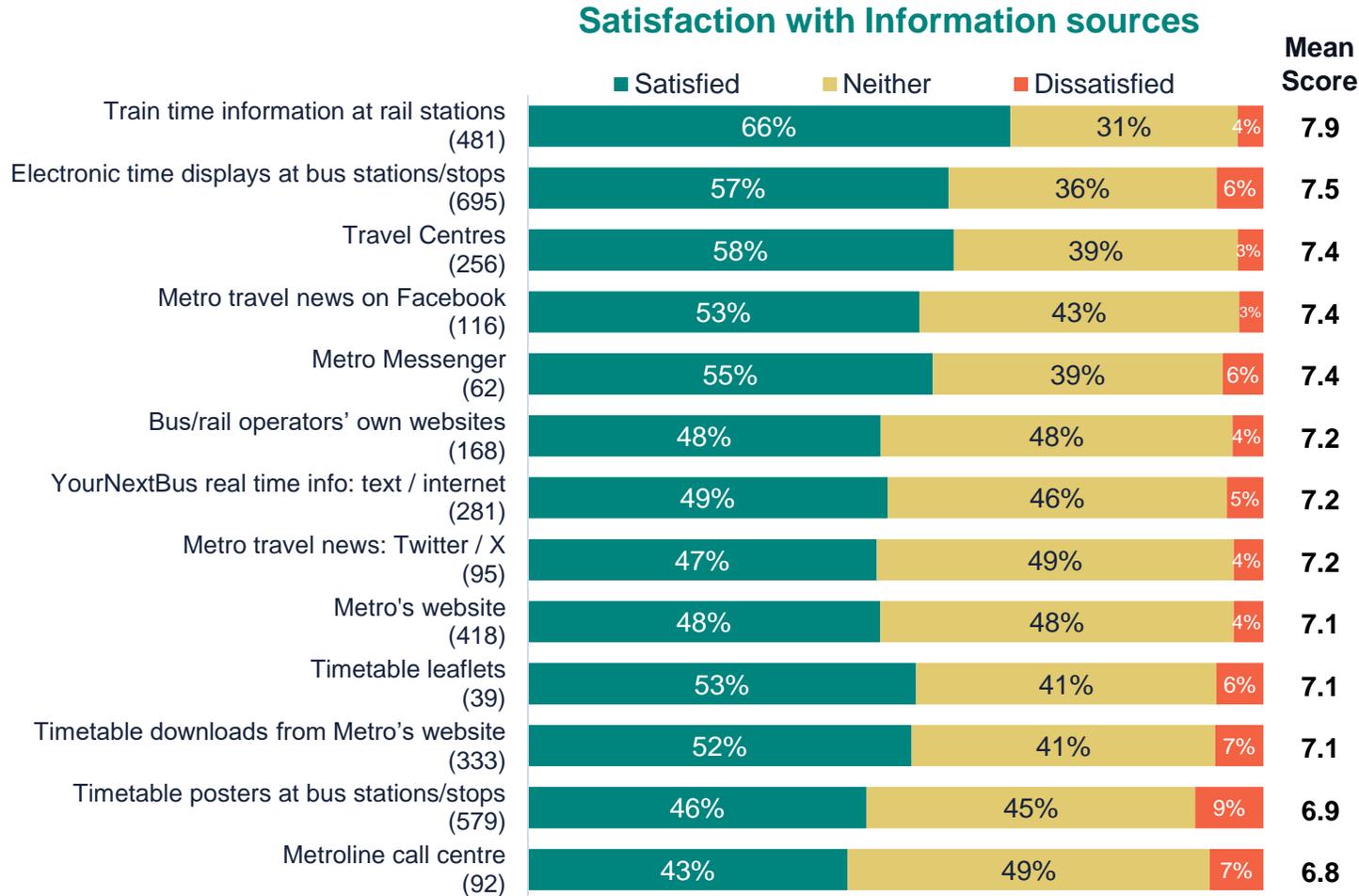


The survey included questions about awareness of transport information sources. The survey found:

- West Yorkshire residents were most aware of electronic displays at bus stations & stops and of timetable posters at bus stations & stops.
- Residents were more aware of bus and rail operators' own websites than they are of the Metro website managed by the Combined Authority.
- Awareness of the Metroline call centre has fallen to **28%** of residents down from **39%** in 2020/21. Only **14%** of respondents reported being aware of Metro Messenger.

Source: Question D3: Are you aware of the following? (% yes). Base: All respondents who gave an answer (2023/24 n=1808).

13. Satisfaction with information sources



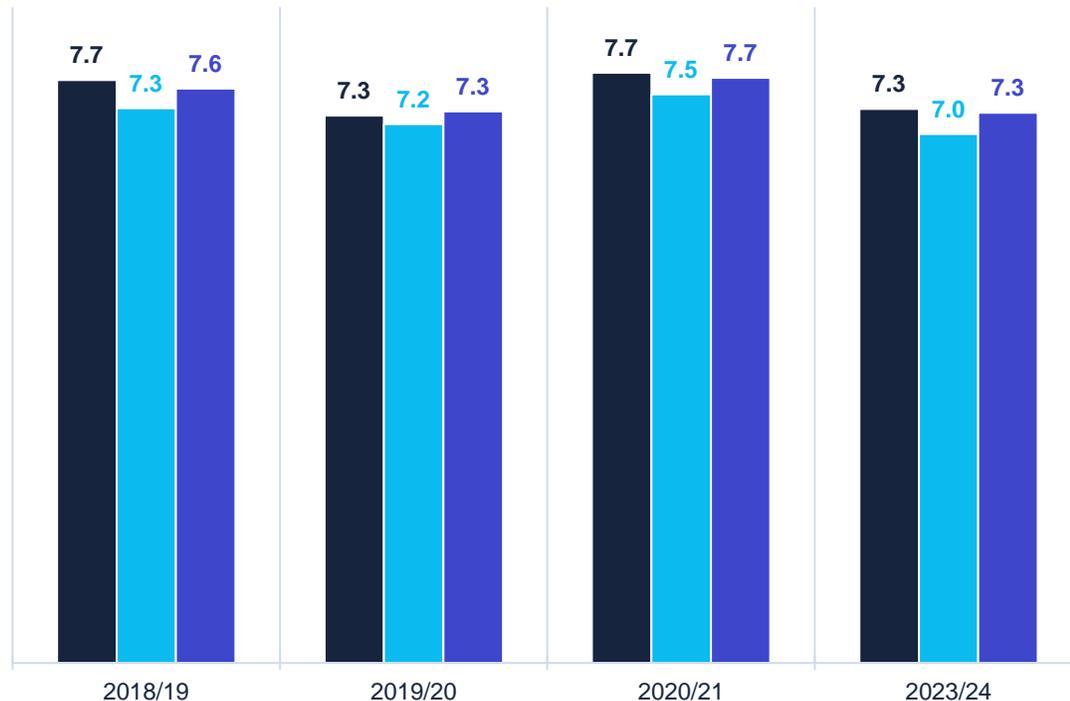
The survey also asked residents about satisfaction with transport information sources that they frequently/occasionally and found:

- The mean satisfaction score with travel centres was **7.4** (out of 10). Over the last 6 years, **60%** of respondents from a White British background were satisfied with travel centres compared with only **49%** of respondents from other ethnic backgrounds. **64%** of those aged 65+ were satisfied but this falls to **51%** of those aged 16 to 34.
- The mean satisfaction for electronic time displays at bus stations and stops was **7.5** (out of 10). This measure has been in decline since it 2020/21 when it was **8.1**.
- In general, levels of dissatisfaction were low with the sources of information that respondents currently use.

Source: Questions D3 Are you aware of...? If D3 = Yes and C7 used a train or bus at least once every 1-3 times per month then **D4** Do you use...frequently, occasionally, very rarely or never? If D4 = frequently or occasionally then **D5** How satisfied are you with this information source on a scale of 1 (very dissatisfied) to 10 (very satisfied)? **Base:** (in brackets) Those who answered **D5** from sample of 1800 residents.

14. Satisfaction with travel information available to make bus journeys is consistently lower than the travel information for rail

- Satisfaction with specific sources weighted by usage
- Satisfaction with information available to make bus journeys
- Satisfaction with information available to make rail journeys



- Satisfaction with travel information for bus journeys is consistently lower than it is for rail journeys (7.0 vs 7.3 out of 10 in 2023/24). Bus has been lower than rail each of the previous years that these question were asked.
- Satisfaction with specific sources weighted by usage is from a combination of questions. The information sources are a selection of ones that are wholly or partially provided under the Metro brand, plus train time information at rail stations. The result only reflects the opinions of residents who use a specific source 'frequently' or 'occasionally'.
- The separate question about satisfaction with information available to make bus & rail journeys, while not asked every year:
 - Includes responses from anyone who uses bus or train at least once a year,
 - Allows for more sources of information including asking a driver, the whole range of websites and apps, printed maps and 'how to get there' guides, direction signage, on-vehicle information, and more.

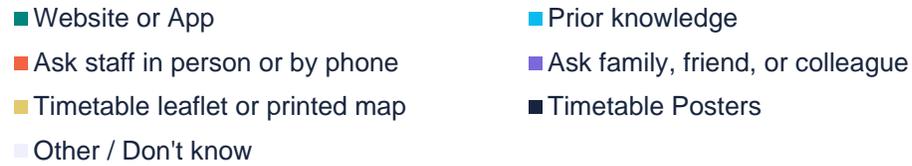
Source: Questions D3 Are you aware of...? If D3 = Yes and C7 used a train or bus at least once every 1-3 times per month then **D4** Do you use...frequently, occasionally, very rarely or never? If D4 = frequently or occasionally then **D5** How satisfied are you with this information source on a scale of 1 (very dissatisfied) to 10 (very satisfied)? **Base:** Those who answered D5 (base in brackets from sample of 1800 residents)

Source: Question F11 How satisfied are you overall with the information available to you to make bus journeys in West Yorkshire? **Base:** Use bus at least once a year

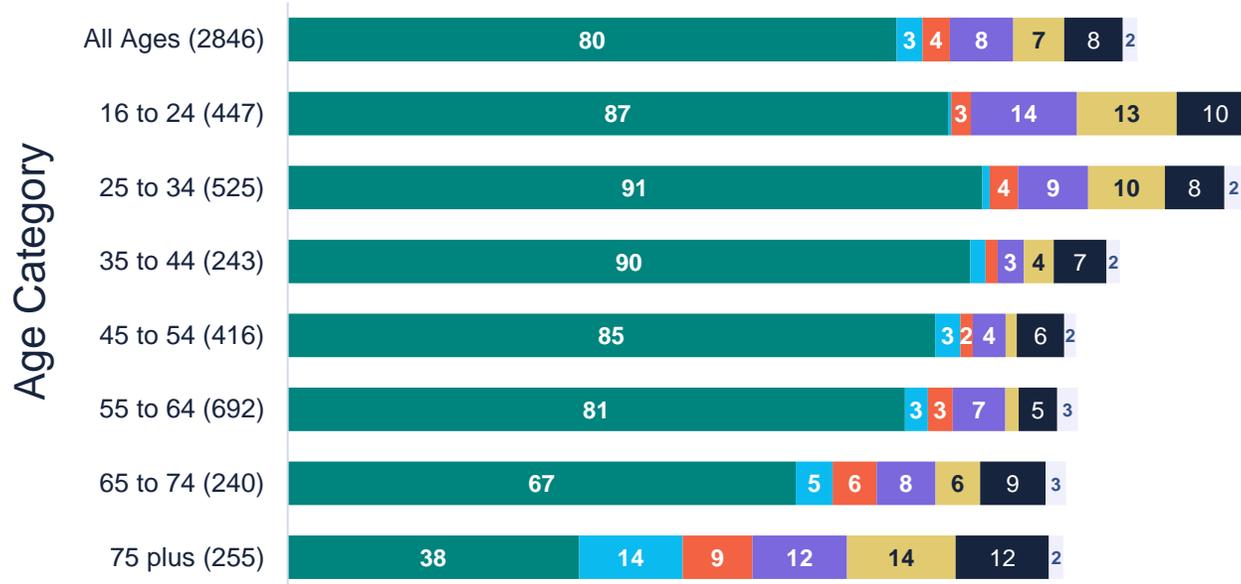
Source: Question F12 How satisfied are you overall with the information available to you to make rail journeys in West Yorkshire? **Base:** Use train at least once a year

15. Websites and apps used to plan a journey

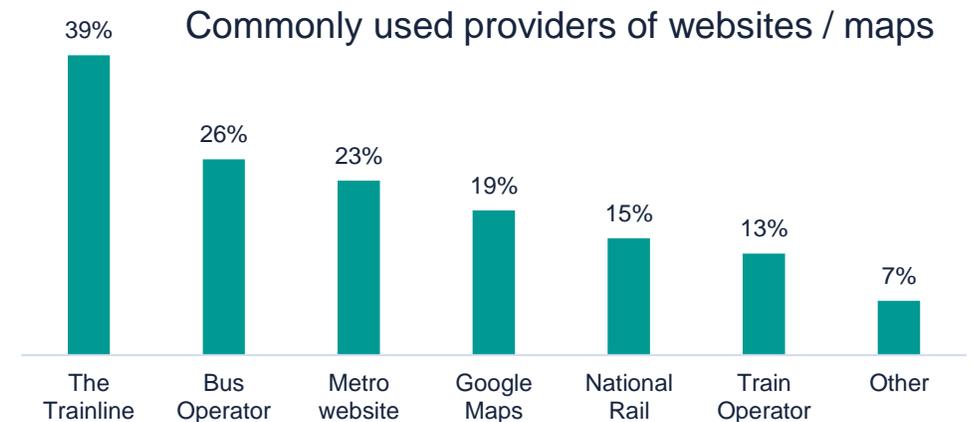
Method used the last time a respondent planned a local public transport journey



Percent of those respondents who planned a journey who used this source (multiple options may be used on one journey so results add up to more than 100%)



- Among residents who sought information to plan a journey, **80%** used websites and apps.
- Respondents aged 75 plus were least likely to use a website or app (**38%**) and most likely to use prior knowledge (**14%**). Those aged under 35 were most likely to use multiple sources per journey.
- The Trainline appears to be the most commonly used source of information to plan a journey, followed by bus operator sources, then the Metro website followed by Google Maps.

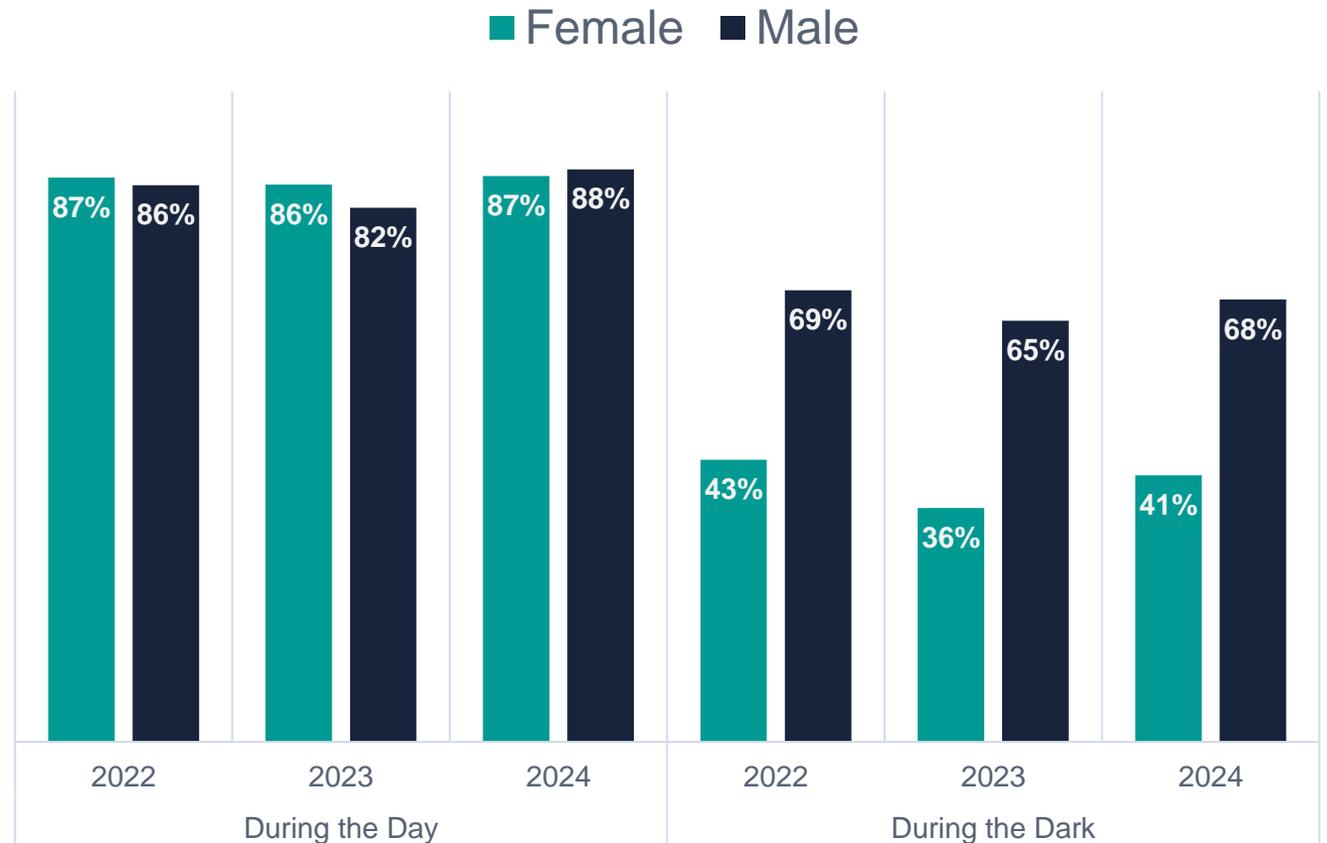


Source: G11. Thinking about the last time you planned a local bus or train journey before setting off, how did you get the information that you needed? G60. What types of transport did you look up information for?
 Base: (in brackets) those who pre-planned their journey 2022/23 and 2023/24 combined. Note: due to use of free-text questions and different ways of counting responses there may be small discrepancies between reports.

16. Personal safety on local buses – the gender gap at night remains large

- **87%** of respondents felt confident in their personal safety while using local buses during the day, however this figure falls to **54%** when using local buses in the dark.
- The difference in confidence in personal safety when travelling by bus between men and women during the dark remains large (**68% vs 41%**).
- Groups also with low confidence levels using buses in the dark are:
 - Those age 65+ (**43%** confident)
 - People who use the bus never or less than once a year (**44%** not confident)
 - The long-term sick and disabled (**36%** confident)
 - Rural residents were more confident than rural (**53% vs 62%** confident)

Confidence in Personal Safety Travelling By Bus



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

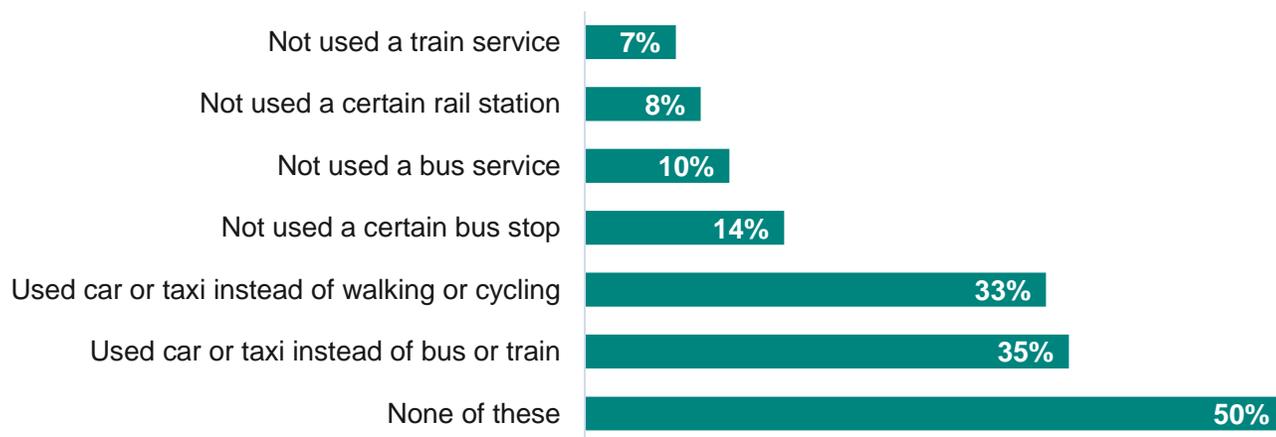
Base: **23/24 Survey** – All respondents (n=1800) **22/23 Survey** All respondents (n=1808) **21/22 Survey** Respondents with time for extra questions (Bus 1051, Train 1055)

17. Half of residents have taken measures to avoid antisocial behaviour or from fear of crime

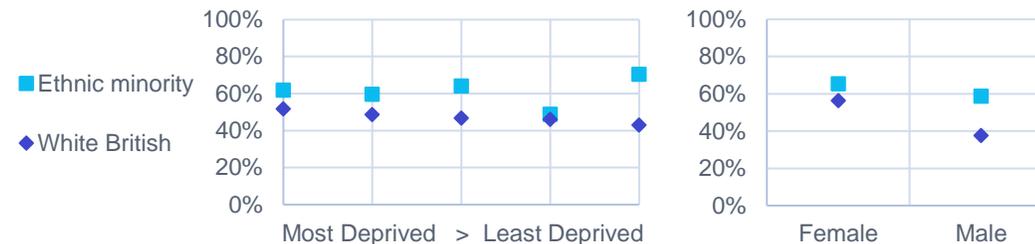
After being asked about confidence in personal safety on public transport, residents were asked if they had previously taken any action to avoid antisocial behaviour. Half of residents reported taking at least one of these measures to in the past 12 months.

Results across 3 years show that: **42%** of **female** respondents had used a car or taxi instead of walking or cycling and **41%** had done so instead of using a bus or train. Young people were more likely to change their mode; **50%** of **women aged 16 to 34** had used a car or taxi instead of walking or cycling and **54%** had done so instead of using a bus or train.

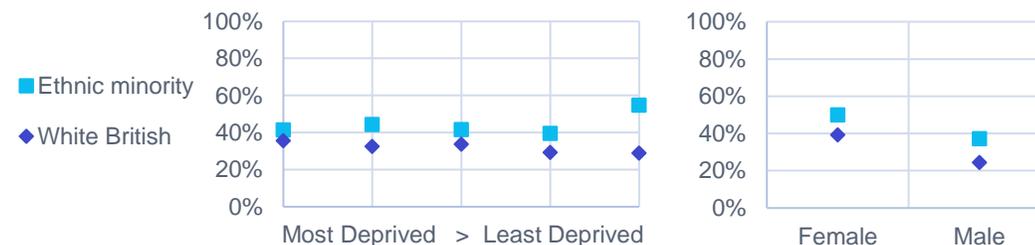
Respondents who live in the most **deprived areas**, those who are **disabled**, and those who identify as an **ethnic minority** were more likely to change their mode than their comparator cohorts. The charts on the right show three years of responses by ethnicity grouping, deprivation quintile, and gender.



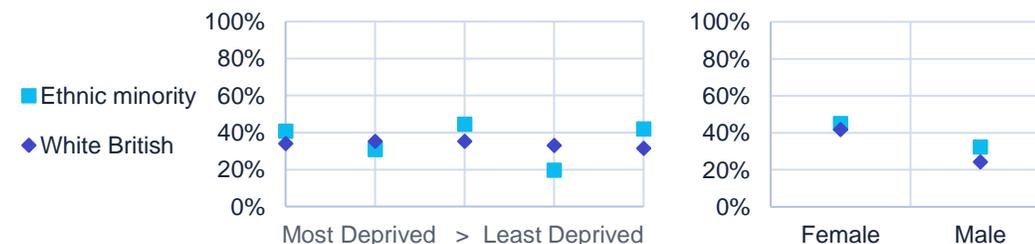
Did something (mode, service, or stop)



Used car / taxi instead of bus / train



Used car / taxi instead of walk / cycle



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

Base: 23/24 Survey – All respondents (n=1800) 22/23 Survey All respondents (n=1808) 21/22 Survey Respondents with time for extra questions (Bus 1051, Train 1055)