West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

MCard

MCard Bus and Rail Survey

Wave 1

October 2024

Content

EXECUTIVE SUMMARY

Key Findings (I)

Bus and Rail Use

- Most respondents (69%) use both the bus and the train with a small percentage of respondents stating they do not use public transport at all for reasons such as ticket prices, unreliability, distance to bus stops, cancellations and disability restrictions.

Tickets

- Single/return tickets were the most common public transport tickets bought by some distance at 43%(n=1,474). Train users buy their train tickets mainly from Northern Trains and MCard and buy their bus tickets predominantly from MCard and First Bus.
- When asked about bus and train travel, people who travelled by both modes bought tickets mainly from MCard (67%, n=579).
- Train travellers across various age groups have different purchasing habits. Most of the younger generation use the MCard to purchase train tickets while the older generation do not use the MCard as much. 18-year-olds buy from MCard the most (67%, n=88) while over 55-year-olds use it the least (less than 25%).

Travel Behaviours

- The travel frequency question shows most people either travel daily (15%,n=478), 5 days a week(14%,n=451), 3 days a week(13%,n=409) or 2 days a week(12%,n=402). When broken down according to employment status, a large proportion of these respondents were in employment either full time or part-time.
- A weeklong travel pattern observation shows a similar proportion of respondents (46%-48%) travelled between Monday and Thursday. This proportion falls slightly on Friday then falls to under 21% on Saturday and Sunday. A summary of travel behaviour from this snapshot shows that between Monday and Thursday most respondents travelled for work with leisure a distant second. A majority of these trips were done by bus (average 27% of workers). For train journeys between Monday and Thursday the main origin stations were Leeds and Bradford while destination stations were mainly Leeds, Bradford stations and outside of West Yorkshire. Fridays have a similar pattern but with less residents travelling. The average journey time on buses on weekdays is 35 minutes and about 36 minutes on trains.
- On weekends, the main reason for travel was for leisure (over 55% of respondents). A higher proportion of these journeys were made by bus with the average bus journey on average 33 minutes long. People that use the train only or train and bus had an average journey time of 46 minutes. The main origin and destination stations were broadly similar to those used on the weekdays.

Key Findings (II)

Travel Behaviours

- The proportion of respondents who said some factors influenced their purchase of bus and train tickets was highest for these 3 factors: 'Flexibility', Easy to buy' and 'Cheapest ticket available'. 65%(n=2,250) were somewhat confident their ticket choice was meeting their needs.
- 'Reduced train use due to train strikes' (60%,n=1,820) and 'Reduced bus use due to poor punctuality or reliability of services' (54%, n=1,640) had the highest proportion of respondents who said these factors had influenced their decision to purchase tickets in the last few years.
- Other reasons mentioned by respondents as an influencing factor for buying tickets were , ' Lack of tickets to support flexible working and leisure travel in one' , 'climate emergency', 'limited places to buy monthly tickets' and 'Lack of clarity of pricing for journeys .

Awareness of MCard Tickets

- Awareness of MCard rail zones are generally not good with most respondents neutral or admitting to having poor knowledge of the MCard rail zones. Breaking down by local authority districts , there is a 7% (n=224) difference in the proportion of respondents who have poor knowledge in Leeds compared to Bradford therefore, there is a bigger knowledge gap in Leeds compared to Bradford.
- Age ranges 45-54 (n=270) and 55-64(n=244) have the largest number of respondents and have the largest proportion of respondents with good knowledge of MCard rail zones compared to 18-year-olds (2%, n= 65), 19–25-year-olds (2%, n= 79) and 26–34-year-olds. (3%, n= 110) who have a relatively lower percentage of respondents with good knowledge of MCard rail zones.
- The £2 single capped bus fare had the highest awareness amongst respondents with 91% (n=3,048) aware of it. The Bus DaySaver MCard Ticket for £5 also had fairly good awareness among more than half of the respondents(66%, n=2,152). 35% (1,125) of respondents stated they were unaware of PlusBus tickets but would like to know more.

Price

- The average amount respondents spent monthly on bus and train travel was £61.63. The median amount was £90.30. The average amount spent on local public transport according to transport modes. Respondents who travel by train and bus have the largest average spend of £64.51 (n=2,125).

Key Findings (III)

Price

- Respondents who spent between £10 and £50 were the most represented with 44% (n=874) of respondents falling within this spend category.
- Respondents who travel by train and bus are the most represented among all price ranges.
- About three-fifths of respondents, who pay in the age ranges of less than £10 (61%, n=126) and £50 (64%, n=515) are employed. As the price ranges rise ticket prices are less affordable to unemployed respondents.
- Of the respondents who spent less than £10, the majority were in the age range 45-54(22%, n=51).55-64-year-olds(30%,n=81) are the most represented age range for spending between £10 and £20. For spending between £30 and £40 , 18-year-olds(26%, n=63) are the most represented.
- Amount spent by respondents on local bus and travel per district shows for spending under £100, Leeds is the most represented district in all price ranges. Leeds is followed by Bradford in terms of representation under £100 spend .

Retail

- The MCard website/app and the bus are the most popular places to buy tickets according to respondents (38%, n=1,314 and 37%, n=1,268 respectively). Train operator apps are not far behind in popularity with 30%(n= 1,024).
- Ticket purchase location by age shows the MCard is popular among 18-year-olds(17%,n=213) 35–44-year-olds(15%,n=195) and 55 to 64 years olds(16%, n=208) who also use it widely.
- Respondents were asked to rate the MCard app and the majority (35%, n=1,123) of respondents said they have never used it before. However, for the people that gave a rating , the average rating was 8.23. This shows some positive feedback.
- For the people who said they never used the app, the main reason stated was a preference to pay for travel with cash /credit in person. A significant number of respondents alternatively used other bus and train company apps while some specified other reasons such as limited phone storage, not knowing about the app, concessionary pass use, living outside West Yorkshire, and some people felt they didn’t need the app.
- The MCard app rating shows a high mean rating among all age categories with the lowest mean rating coming from 19–25-year-olds (7.4, n=232) and the highest rating from over 65’s(9.7 to 10, n=430)

Key Findings (IV)

Future Ticketing Considerations

- Most respondents would recommend the MCard app to others.
- From a list of proposed improvements to the app, most of them elicited a positive response with the most popular being a bus and train tracker (94% approval, n=1,922).
- Other suggestions for improvements to the MCard app included, the option to add passes to digital wallet, faster ticket issuing, app discounts, less glitches, less clicks to buy tickets, loading tickets on MCard to app and being able to use both simultaneously, bus stop maps, loyalty points system, incorporation of concession passes, longer log out timeouts, QR codes which are easier to scan, easier ways to update personal details, offline tickets, card information saving on app and easier refund claim process.
- Future ticket offers when broken down according to single public transport modes and dual transport mode users, we found that, respondents who use both train and bus are well represented in each ticket offer compared to other modes, and there is a larger proportion of bus and train users (82%, 682) who voted for ticket offer; “Buy a combined ticket for unlimited bus and train travel in West Yorkshire, with rail zone options and different validity periods available”.
- Respondents were asked to make a single choice among 6 options on which bus and train ticket offer they were likely to purchase in the future. Buying train and bus tickets separately got the most votes , with 33% (n=1,068).
- New zonal ticket proposals got mixed responses with zones covering travel to Manchester having the most positive response from respondents. 49% (n=1,240) said this zone ticket would be useful to them while 23% (n=588) said maybe it would be useful. Most of the new zone tickets offered were useful to more than 40% of respondents.
- 70% (n=2,281) of respondents stated they agreed a new zone train ticket needed to include bus travel within West Yorkshire. This shows this new zone ticket will be popular among West Yorkshire residents. Respondents were asked how likely they were to buy a bus ticket for travel outside of West Yorkshire and a higher percentage voted that this was unlikely.
- Respondents were asked whether they would like a subscription that offers unlimited bus and train tickets capped at a monthly fixed rate and the majority (54%, n=1,800) of respondents said maybe they would be interested in that offer, but it will be dependent on the price or other benefits.
- Additional benefits that had the most positive response from respondents were ‘Take a friend for free on Sundays and Bank Holidays’ and ‘Discounts from partner organisations e.g. 20% off a coffee’ .

Background and methodology

This report summarises the results of the first MCard Bus and Rail (Wave 1).

This survey has been launched to create a baseline for understanding MCard bus and rail users in West Yorkshire (WY) with regards to journeys undertaken, ticket and retail awareness and preferences, options for future ticket range development and likelihood of purchase.

The survey results will provide understanding of:

- multi-modal public transport usage within West Yorkshire
- preferences for buying public transport tickets
- the awareness, reasons and barriers to buying & using MCard tickets
- proposed future ticketing options and gauge interest and likelihood of purchase

These results will be reviewed alongside empirical evidence on MCard application user database and MCard ticket sales database.

The survey was promoted through MCard marketing channels such as the MCard website, the MCard social media pages, the MCard messenger subscribers, TPN newsletter subscribers, WYCA intranet pages, Connecting Leeds newsletters, Moovit subscribers, the Your Voice website and through bus station digital screens. The survey was also sent by email to MCard marketing group members and MCard mobile users who said yes to receiving marketing texts. It is important to note that these promotion channels are limited to the MCard users' customer base and other associated entities.

The survey targeted MCard users between ages 18 and 64 while excluding public transport users with ENCTS concessionary pass as they are unlikely to buy MCard products and children under 18 due to GDPR age restrictions.

Responses were gathered between August and September 2024 using an online survey platform Snap Survey, achieving a total of 3,549 responses. This sample size gives a 96% confidence interval of +/-2%.

Background and methodology

Sample analysis was done to ensure the results met the set quotas and a representative sample of West Yorkshire was obtained. The quotas were set using empirical data from surveys such as the West Yorkshire Residents Perception of Transport Survey 2024 (TRACKER Survey) and the 2021 National Census. The TRACKER survey and census were used as the next best data to set quotas because demographic information on MCard users is not available via operational data beyond broad age cohorts.

The analysis shows that the survey results are satisfactorily representative of the population of the West Yorkshire population. The demographic spread (district, age gender, ethnicity, disability and Socio-Economic Group, SEG) has not been weighted to correct for imbalances in the sample population.

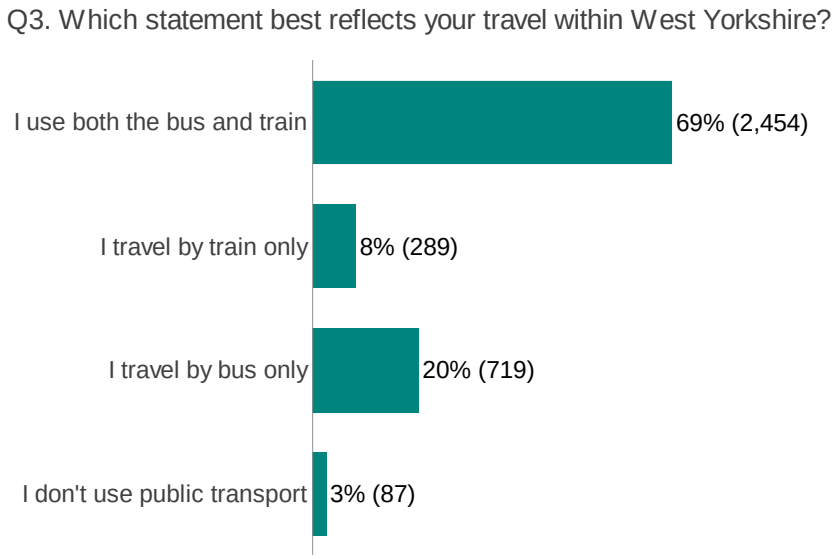
		Target quota (n)	Achieved (n)
District	Bradford	22%	24% (796)
	Calderdale	9%	10% (314)
	Kirklees	18%	16% (505)
	Leeds	35%	38% (1,249)
	Wakefield	15%	11% (340)
Gender	Male	52%	53% (1,749)
	Female	48%	47% (1,518)
Age	18-34	32%	26% (889)
	35-64	47%	59% (1,992)
	65+	21%	14% (482)
Ethnicity	White British	77%	81% (2,766)
	All other ethnicities	23%	19% (631)
SEG	ABC1	56%	66% (2,176)
	C2DE	43%	33% (1,074)
Disability	Yes	19%	19% (586)

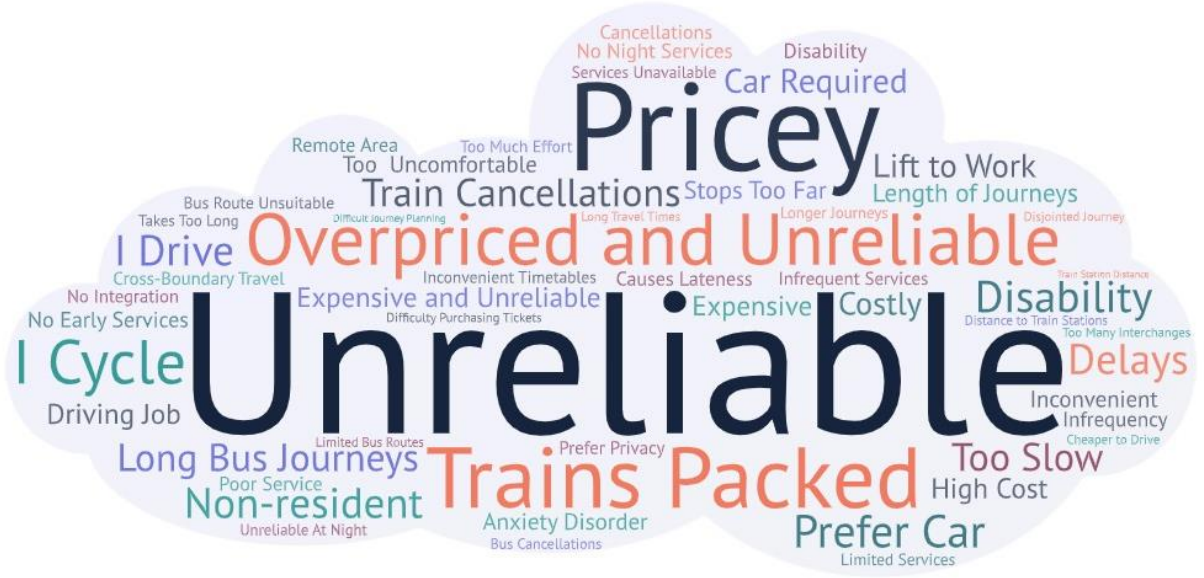
BUS AND RAIL USE

Bus and Rail Use

69% of survey respondents (n=2,454) reporting using both the train and bus, whilst 1 in 5 (20%, n=719) reporting being bus users only. 3% (n=87) said they didn't use public transport, and when asked why, their reasons reference frequency, ticket prices, reliability, distance to bus stops, irregular timetables, cancellations and disability restrictions.

Note that as the survey was promoted through MCard customer channels, the responses do not represent the general population but represents a specific sample.





Source: Q3. Which statement best reflects your travel within West Yorkshire? ; Q4. Why do you not use public transport? Please comment...
Base: Q3= all respondents (n=3,549); Q4= respondents who said , “I don’t use public transport “ (n=87)

TICKETS

MCard Bus and Rail Survey

General Ticket Types

43% (n=1,474) of public transport users reported buying single/return tickets when they travelled, whilst just under 1 in 4, 24% (n=825) usually purchased day tickets.

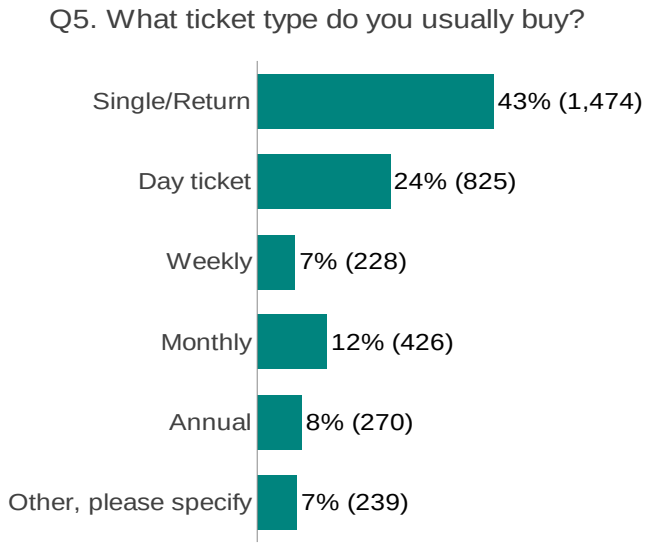
12% of survey respondents said they usually bought a monthly ticket (n=426), whilst annual and weekly tickets were the least popular at 8% (n=270) and 7% (n=228) respectively.

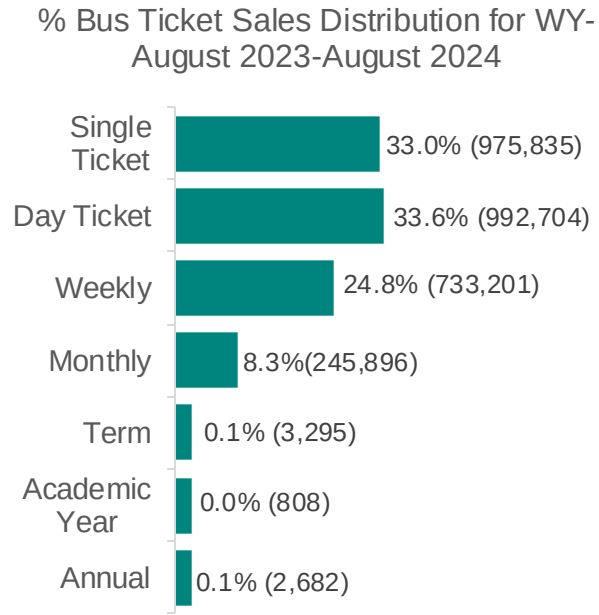
Some respondents (7%, n=239) specified that they used other types of tickets which includes senior bus passes, disabled travel passes, flexi season tickets, 8 flexi time train tickets, 3-day tickets, 10/20 singles park and ride tickets, northern flexi passes and term passes.

Percentage bus ticket sales distribution by ticket type in West Yorkshire for a year (August 2023 to August 2024) has a different spread than the distribution of ticket types from this survey. The distribution of ticket types from sales shows a much larger proportion(24.8%) for weekly bus tickets than in this survey (7%).

Source: Q5. What ticket type do you usually buy?
Base: Q5= all respondents (n=3,462)
Source: V1. Percentage bus sales distribution by ticket type for West Yorkshire in the most recent year- August 2023 to August 2024
Base: V1= all ticketer sales data (n=2,954,421)

MCard Bus and Rail Survey





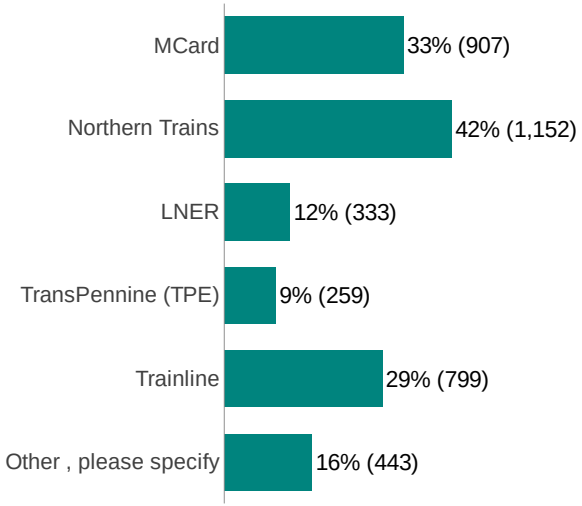
Train and Bus Ticket Brands

About half (52%, n=1,620) of respondents stated they bought their bus tickets from MCard, the highest share, and 35% (n=1,109) bought tickets through First Bus. For train tickets a third (33%, n=907) bought tickets from MCard and this was second to Northern Trains where 42% (n=1,152) of respondents bought their train tickets. It is important to note that this survey was promoted to MCard customer bases therefore, this is reflected in the relatively high representation of MCard bus and train ticket users in this response. These questions were also multi-select questions; therefore, the percentages don't add up to 100.

Other bus ticket brands mentioned include TLC, Trainpal, Yorkshire Coastliner, Keighley Bus Company and other train ticket brands mentioned were, Trainpal, Splitmyfare, Virgin Trains, Trainsplit, Hull Trains, Trip.com, and Cross Country Trains.

Train Ticket Brands

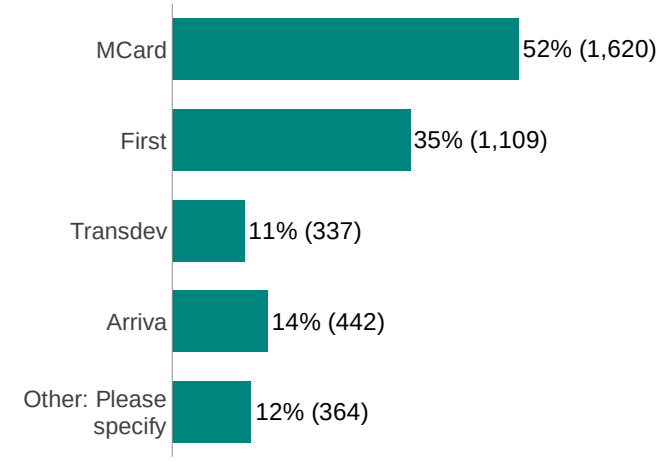
Q6. Where do you normally purchase your train tickets from?



Source: Q6. Where do you normally purchase your train tickets from?
Base: Q6 = all respondents (n=2,743)

Bus Ticket Brands

Q7. What brand of tickets do you usually buy for your bus travel?



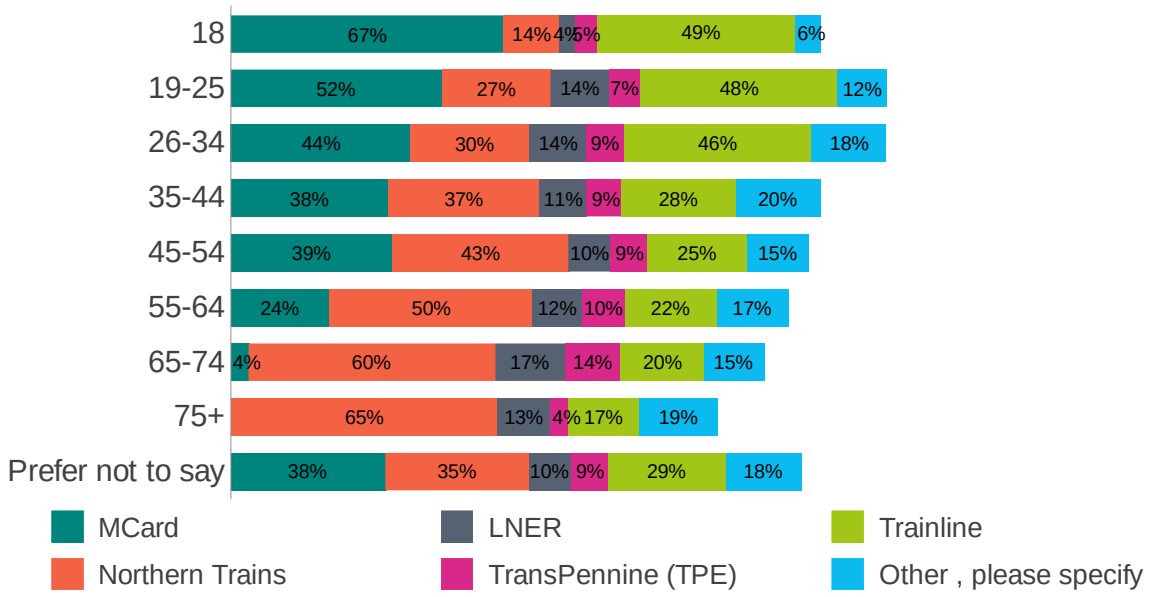
Source: Q7. What brand of tickets do you usually buy for your bus travel?
Base: Q7= all respondents (n=3,143)

Train and Bus Ticket Brands by Age

The two multi-select train and bus ticket brand questions are broken down by age categories in the charts below.

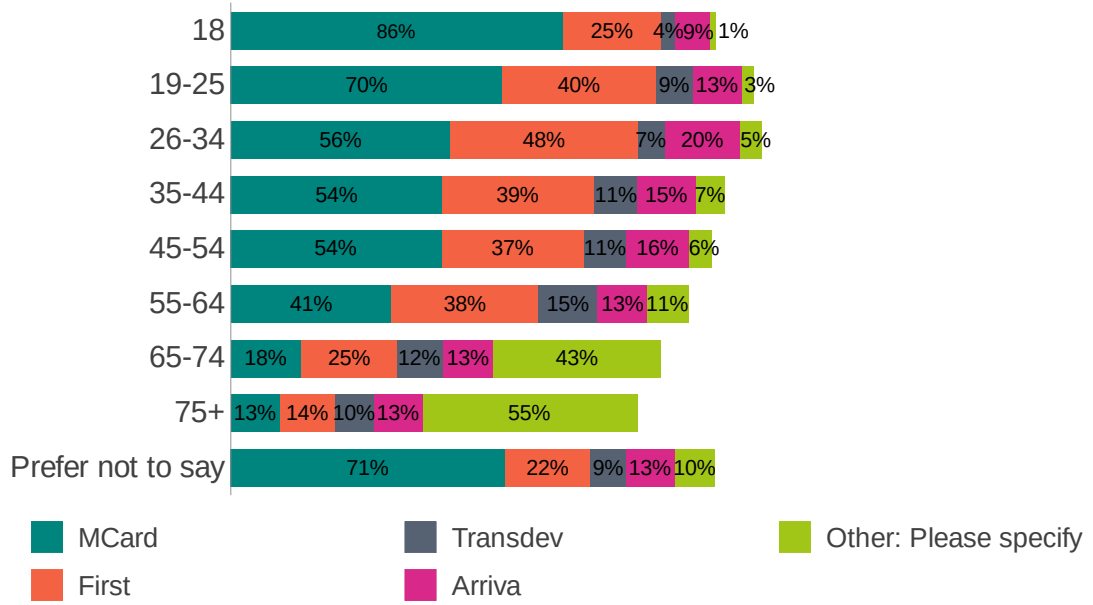
18-year-olds use the MCard the most (67%, n=88) when buying train tickets while 55–64-year-old use it the least (24%, n=155). MCard users across age categories for bus tickets follows the same pattern as mentioned for train tickets. However, there is a higher percentage of MCard bus ticket customers(respondents) in each age category. Respondents were able to select multiple choices of tickets brands therefore the charts below shows bars representing each age category. For each bar/age category there are segments representing ticket brand choices which could range from 1 to 100 percent. As some respondents chose several ticket brands , each segment represents the percentage of the total amount of respondents independent of other ticket brand choices the same people might have made. This explains why the bars will not add up to a 100%.

Q27. Which of these age categories do you belong X Q6. Where do you normally purchase your train tickets from?



Source: Q6. Where do you normally purchase your train tickets from?& Q27. Which of these age categories do you belong to?
Base: all respondents (n=varies)

Q27. Which of these age categories do you belong to? X Q7. What brand of tickets do you usually buy for your bus travel?



Source: Q7. What brand of tickets do you usually buy for your bus travel? & Q27. Which of these age categories do you belong to?
Base: all respondents (n varies

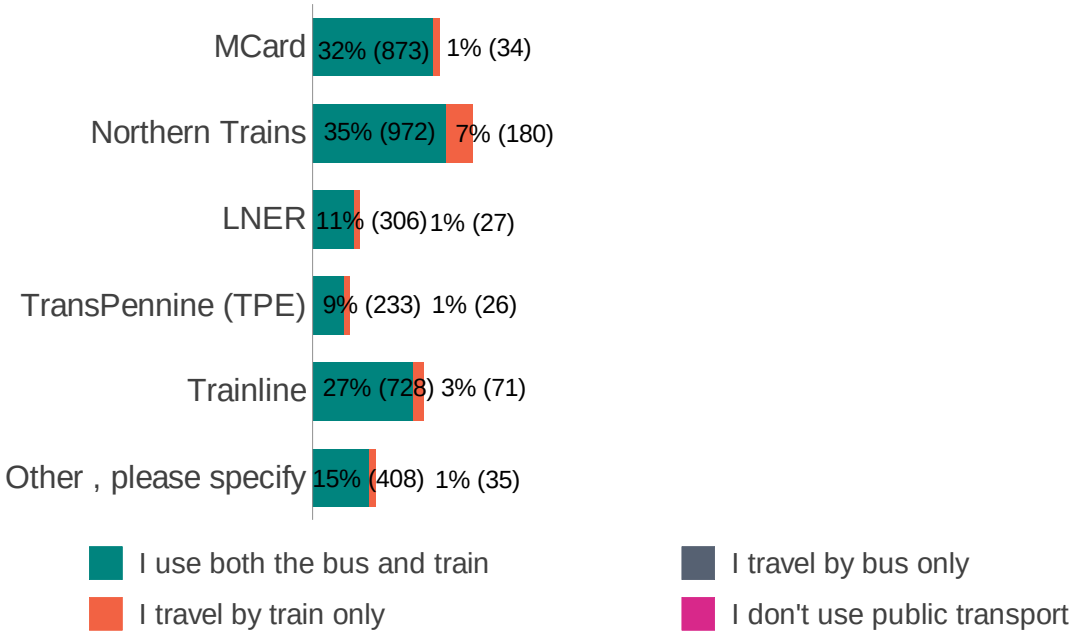
Train and Bus Ticket Brands by Mode

The two multi-select train and bus ticket brand questions are broken down by mode of choice in the charts below.

Respondents who opted for the MCard for their train travel mostly use both bus and train with 36% (n=873) of respondents admitting to this.

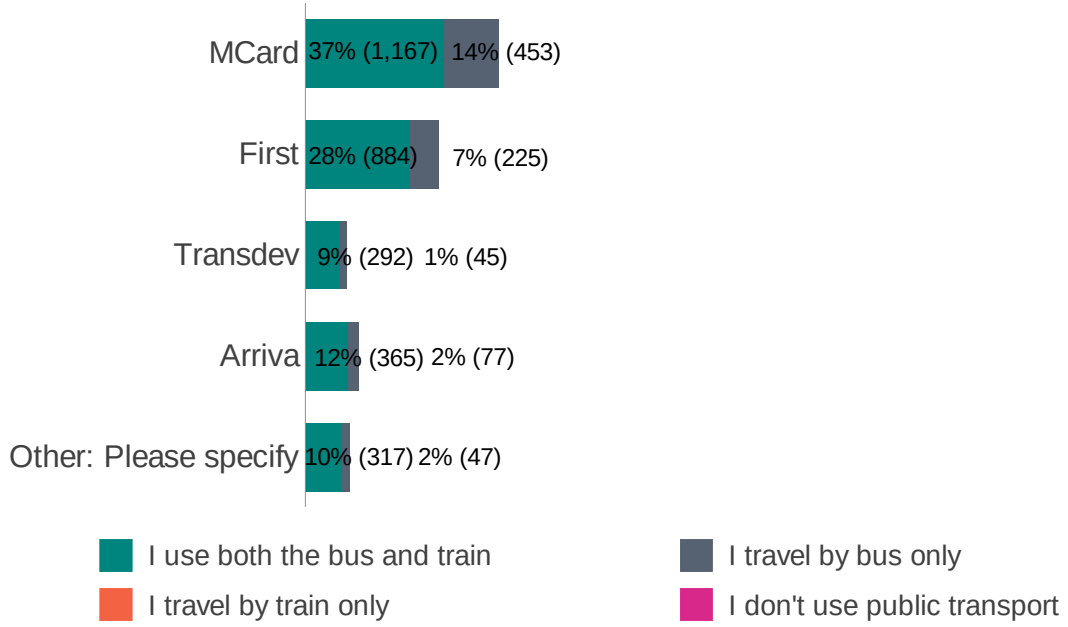
Respondents who bought bus tickets from MCard, also were more bus and train users than bus only users with 37% (1,167).

Q3. Which statement best reflects your travel within West Yorkshire X Q6. Where do you normally purchase your train tickets from?



Source: Q3. Which statement best reflects your travel within West Yorkshire X Q6. Where do you normally purchase your train tickets from?
Base: all respondents (n=2,743)

Q3. Which statement best reflects your travel within West Yorkshire X Q7. What brand of tickets do you usually buy for your bus travel ?



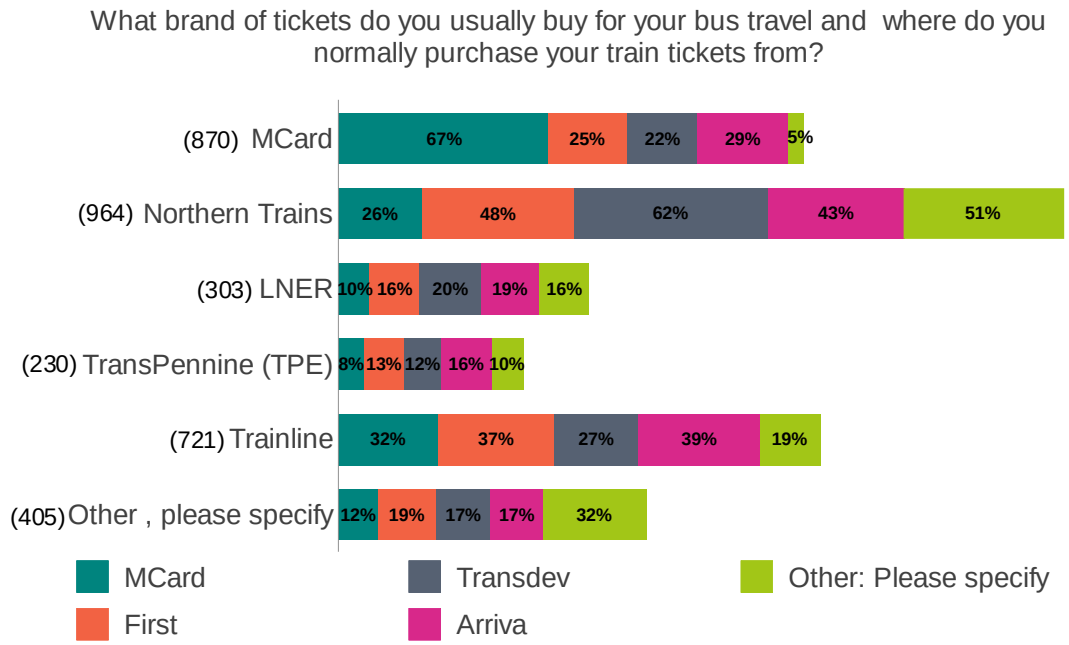
Source: Q3. Which statement best reflects your travel within West Yorkshire X Q7. What brand of tickets do you usually buy for your bus travel?
Base: all respondents (n= 3,143)

Train and Bus Ticket Brand Matches

The chart shows respondents who answered to question 6 and question 7 and how their responses matched in terms of their MCard use for both bus and train ticket brands. (train tickets-y-axis and bus tickets-x-axis).

Please note, the bars in the charts do not add up to 100% because some respondents chose several brand options. 2564(82%) respondents selected one ticket option for buses while 579(18%) respondents selected more than one. For train tickets 1988(72%) respondents choose one ticket brand option while 755(28%) choose two or more ticket options. Each percentage represents a single choice as a percentage of the total but are independent of other choices made.

It shows that of the respondents who bought MCard train tickets, about two-thirds (67%, n=579) of these respondents also bought MCard bus tickets which is the highest percentage among bus and train ticket brand matches. It is important to note that this survey was promoted through MCard user marketing channels therefore MCard users may be overrepresented.



Source: Q6. Where do you normally purchase your train tickets from?, Q7. What brand of tickets do you usually buy for your bus travel?
Base: Q6&Q7 = all respondents (n=3,493)

TRAVEL BEHAVIOURS

Travel Frequency

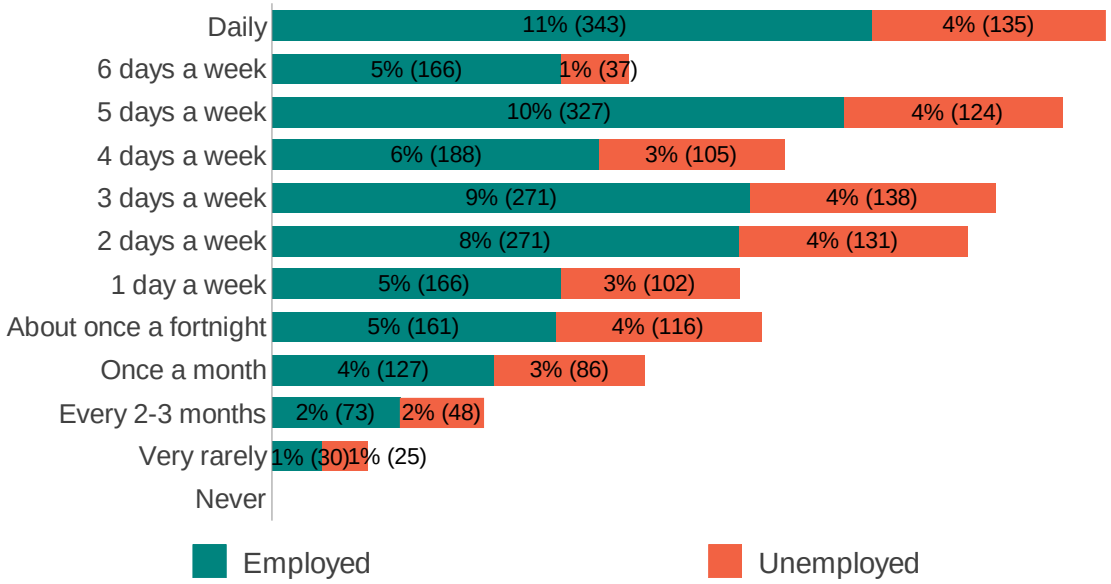
Respondents who travel daily by bus and/or train are the highest proportion at 15%(n=478) with 11%(n=343) of those respondents being employed and 4%(n=135) being unemployed. People in unemployment included students in full time study, retired people, carers, and sick/disabled people etc.

People who stated they travelled 5 days a week were a close second at 14%(n=451) while people who travelled 3 days a week and 2 days were 13%(n=409) and 12%(n=402) of the population, respectively. The majority of these respondents are in employment. The proportion of people travelling 5 days a week and travelling 2/3 days are week are quite close. This may be as a result of a change in working patterns as more people commute less and work from home.

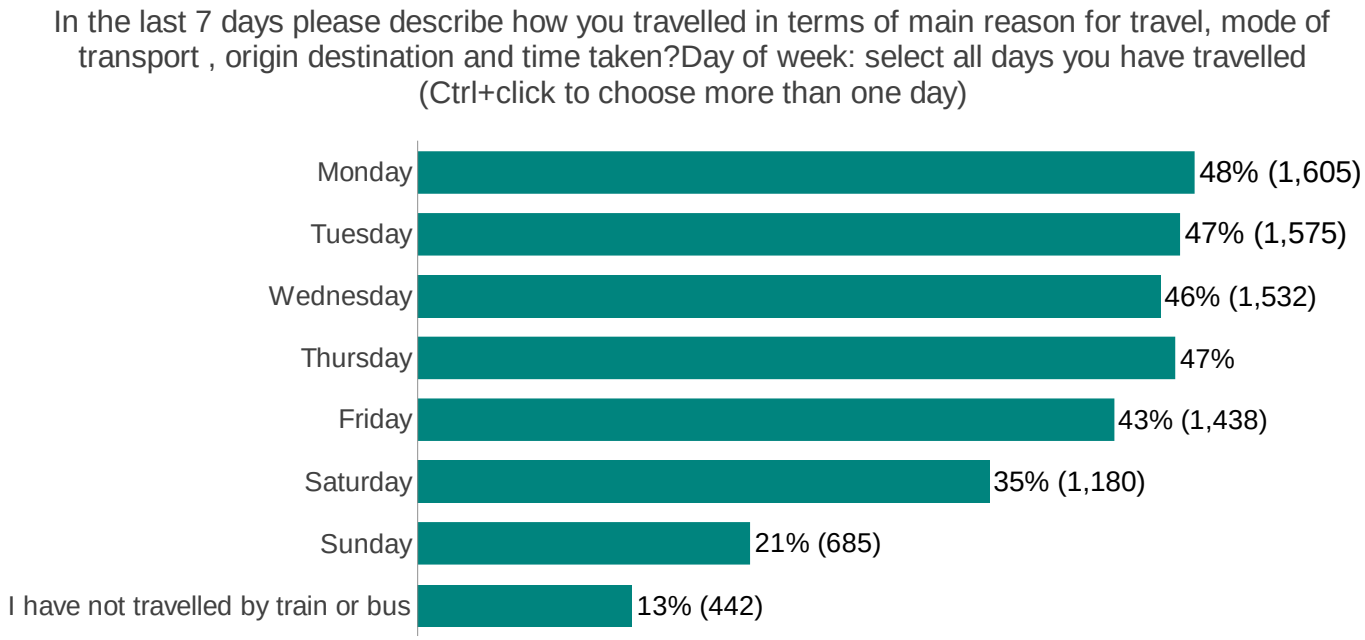
Source: Q8. How often do you travel on train and/or bus in West Yorkshire?
Base: Q8 = all respondents (n=3,166)

MCard Bus and Rail Survey

Q8. How often do you travel on train and/or bus in West Yorkshire divided by employment status



Days of the week people use bus or train



Respondents were asked which days of the week they travelled by bus or train in the previous 7 days before the survey (Q9). On average between Monday and Thursday 47% of respondents travelled. Friday has a slightly lower proportion of residents at 43% (n=1,438) . On the weekend, the proportion of residents falls to 35% (n=1,180) on Saturday and 13% (n=442) on Sunday.

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken? Day of week: select all days you have travelled (Ctrl+click to choose more than one day)
Base: Q9 = all respondents (n=3,341)

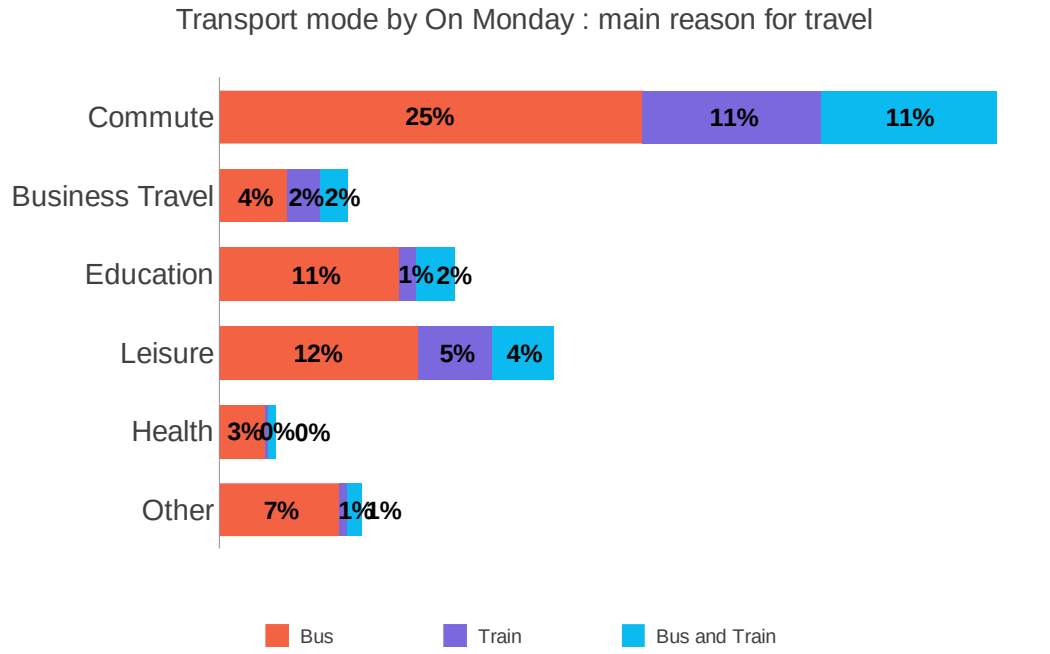
Monday

In the previous Monday, commuting was the main reason for travel for 47%(734) of respondents. 25%(n=401) of commuters travelled by bus while 11%(n=168, n=165) travelled by train and 'bus and train ' respectively.

Respondents travelling for leisure made up 22% of the the total respondents (n=1,577). 12%(n=187) travelled by bus while 5%(n=71) travelled by train and 4%(n=57) by bus and train. Most of the respondents(11%, n=171) who travelled for education in the previous Monday travelled by bus.

Respondents travelling by train on Monday travelled mostly from stations like Leeds (n=77), Bradford (n=56) , Huddersfield (n=43) , Bingley (n=24) and 'Out of West Yorkshire Stations' (n=24) . The main destination train stations were Leeds (n=314), Bradford (n=43), stations outside West Yorkshire (n=40) and Huddersfield (n=24).

The average bus and train journey was 33 minutes according to respondents. 92% (1,421) of the journeys made were return journeys.



Counts Analysis % Respondents	Base	On Monday : main reason for travel					
		Commute	Business Travel	Educatio-n	Leisure	Health	Other
Total	**1577**	**734**	**121**	**221**	**315**	**52**	**134**
Transport mode							
Train	**295** **18.7%**	168 22.9%	30 24.8%	16 7.2%	71 22.5%	2 3.8%	8 6.0%
Bus	**982** **62.3%**	401 54.6%	65 53.7%	171 77.4%	187 59.4%	44 84.6%	114 85.1%
Bus and Train	**300** **19.0%**	165 22.5%	26 21.5%	34 15.4%	57 18.1%	6 11.5%	12 9.0%

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken?
Base: Q9 = respondents who travelled in the previous Monday (n=1,577)

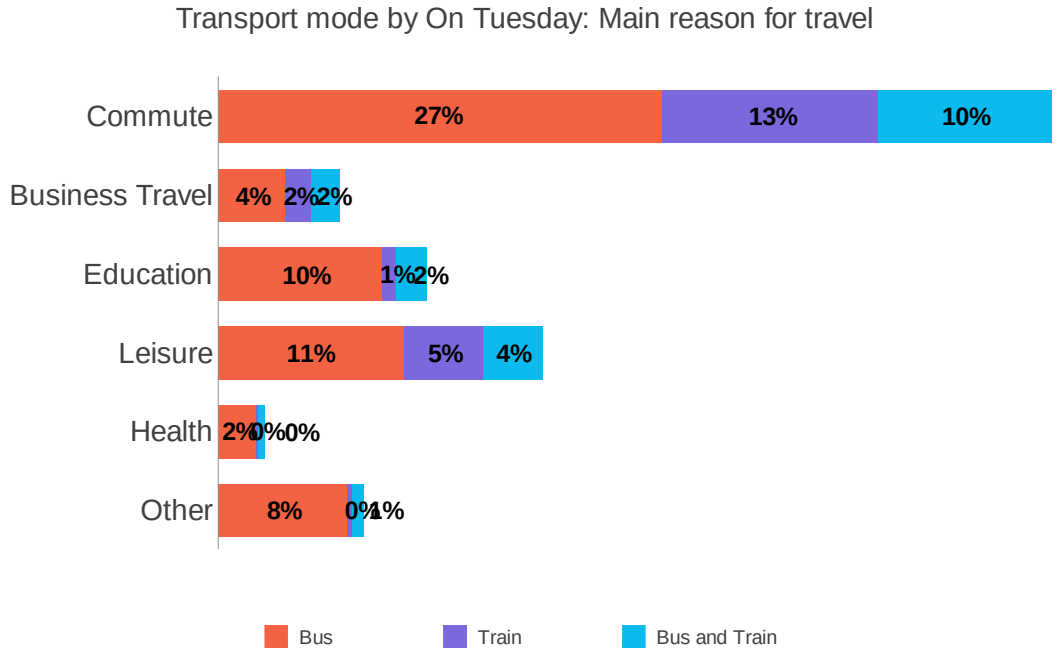
Tuesday

In the previous Tuesday, commuting was the main reason for travel for 50%(n=759) of respondents. 27%(n=406) of these commuters travelled by bus, while 13%(n=196) travelled by train and 10% (n=157) travelled by ‘bus and train ’.

Respondents travelling for leisure made up 20% of the total respondents (n=1,525). 11%(n=170) travelled by bus while 5%(n=72) travelled by train and 4%(n=53) by bus and train. Most of the respondents(12%, n=189) who travelled for education in the previous Tuesday travelled by bus.

Respondents travelling by train on Tuesday travelled mostly from stations like Leeds (12%), Bradford (10%) , and Huddersfield (8%) . The main destination train stations were Leeds (55%), Bradford (8%), stations and outside West Yorkshire (6%).

The average bus journey was 34 minutes long and the average train journey was 35 minutes according to respondents. 92% (n=1,377) of the journeys made were return journeys.



Counts Base % Respondents	Base	On Tuesday: Main reason for travel					
		Commute	Business Travel	Educatio-n	Leisure	Health	Other
Total	**1525**	**759 49.8%**	**109 7.1%**	**189 12.4%**	**295 19.3%**	**42 2.8%**	**131 8.6%**
Transport mode							
Train	**312 20.5%**	196 12.9%	24 1.6%	13 0.9%	72 4.7%	2 0.1%	5 0.3%
Bus	**939 61.6%**	406 26.6%	61 4.0%	150 9.8%	170 11.1%	35 2.3%	117 7.7%
Bus and Train	**274 18.0%**	157 10.3%	24 1.6%	26 1.7%	53 3.5%	5 0.3%	9 0.6%

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken?
Base: Q9 = respondents who travelled in the previous Tuesday (n=1,525)

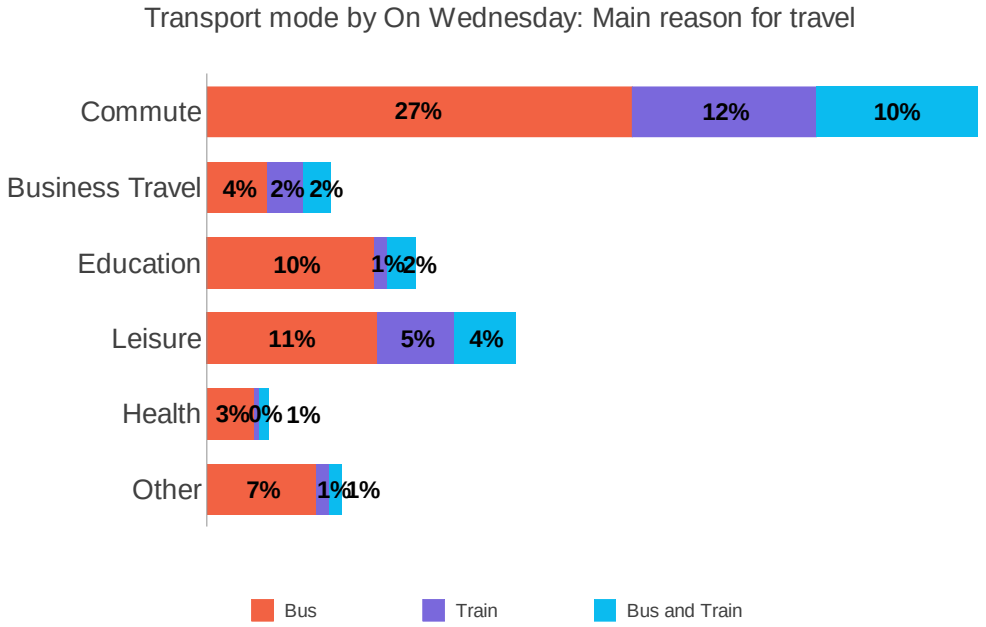
Wednesday

In the previous Wednesday, commuting was the main reason for travel for 48%(n=703) of respondents. 27%(n=388) of these commuters travelled by bus, while 12%(n=169) travelled by train and 10% (n=146) travelled by ‘bus and train ’.

Respondents travelling for leisure made up 19% of the total respondents (n=1,465). 11%(n=156) travelled by bus while 5%(n=70) travelled by train and 4%(n=56) by bus and train. Most of the respondents(13%, n=190) who travelled for education in the previous Wednesday travelled by bus.

Respondents travelling by train on Wednesday travelled mostly from stations like Leeds (12%), Bradford (10%) , and Huddersfield (7%) . The main destination train stations were Leeds (49%), Bradford (9%), stations and outside West Yorkshire (8%).

The average bus journey was 35 minutes long and the average train journey was 38 minutes according to respondents. 92% (n=1,311) of the journeys made were return journeys.



Counts Base % Respondents	Base	On Wednesday: Main reason for travel					
		Commute	Business Travel	Educatio-n	Leisure	Health	Other
Total	**1465**	**703** **48.0%**	**112** **7.6%**	**190** **13.0%**	**282** **19.2%**	**56** **3.8%**	**122** **8.3%**
Transport mode							
Train	**299** **20.4%**	169 11.5%	32 2.2%	12 0.8%	70 4.8%	5 0.3%	11 0.8%
Bus	**892** **60.9%**	388 26.5%	55 3.8%	152 10.4%	156 10.6%	42 2.9%	99 6.8%
Bus and Train	**274** **18.7%**	146 10.0%	25 1.7%	26 1.8%	56 3.8%	9 0.6%	12 0.8%

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken?
Base: Q9 = respondents who travelled in the previous Wednesday (n=1,465)

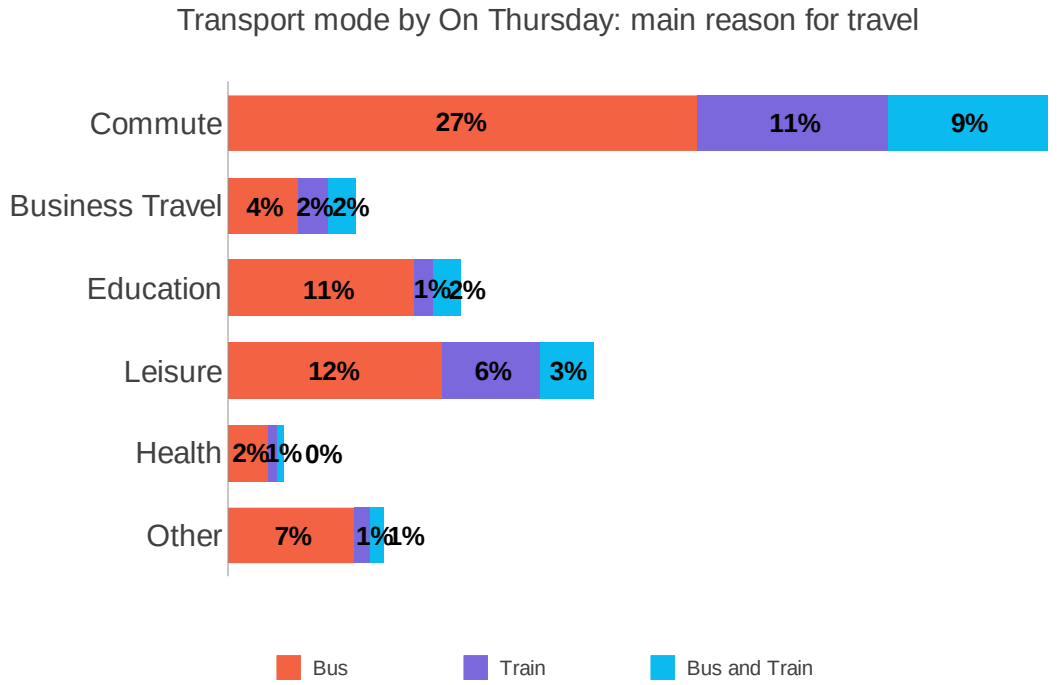
Thursday

In the previous Thursday, commuting was the main reason for travel for 47%(n=700) of respondents. 27%(n=401) of these commuters travelled by bus, while 11%(n=163) travelled by train and 9% (n=136) travelled by ‘bus and train ’.

Respondents travelling for leisure made up 21% of the total respondents (n=1,495). 12%(n=182) travelled by bus while 6%(n=84) travelled by train and 3%(n=45) by bus and train. Most of the respondents(13%, n=198) who travelled for education in the previous Thursday travelled by bus.

Respondents travelling by train on Thursday travelled mostly from stations like Leeds (11%), Bradford (9%) ,and Huddersfield (8%) . The main destination train stations were Leeds (53%), Bradford (8%), stations and outside West Yorkshire (6%).

The average bus journey was 36 minutes long and the average train journey was 35 minutes according to respondents. 91% (n=1,330) of the journeys made were return journeys.



Counts Base % Respondents	Base	On Thursday: main reason for travel					
		Commute	Business Travel	Educatio-n	Leisure	Health	Other
Total	**1495**	**700 46.8%**	**108 7.2%**	**198 13.2%**	**311 20.8%**	**46 3.1%**	**132 8.8%**
Transport mode							
Train	**309 20.7%**	163 10.9%	26 1.7%	16 1.1%	84 5.6%	7 0.5%	13 0.9%
Bus	**944 63.1%**	401 26.8%	60 4.0%	159 10.6%	182 12.2%	34 2.3%	108 7.2%
Bus and Train	**242 16.2%**	136 9.1%	22 1.5%	23 1.5%	45 3.0%	5 0.3%	11 0.7%

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken?
Base: Q9 = respondents who travelled in the previous Thursday (n=1,495)

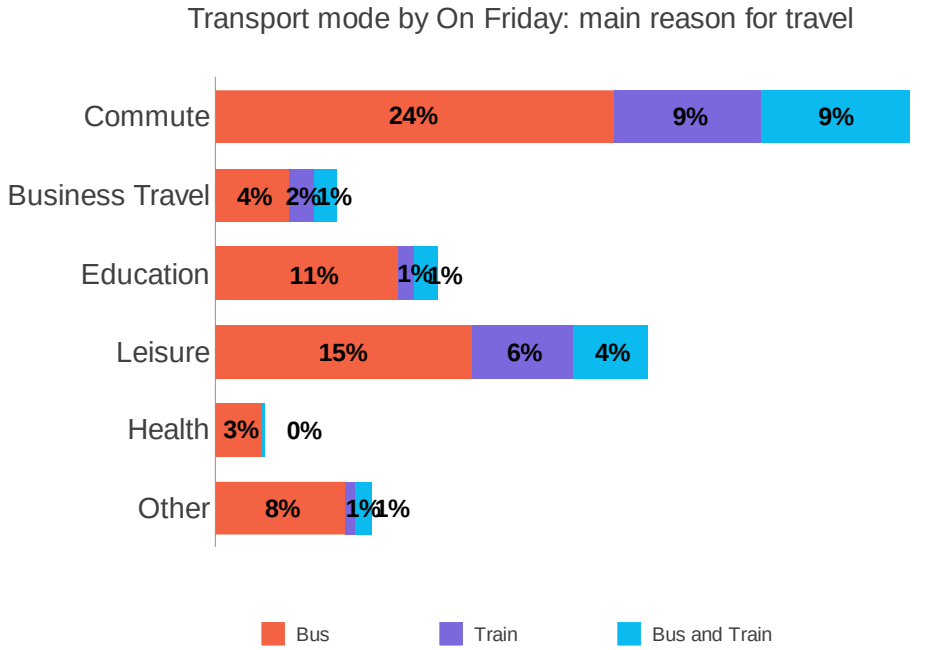
Friday

In the previous Friday, commuting was the main reason for travel for 42%(n=572) of respondents. 24%(n=329) of these commuters travelled by bus, while 9%(n=121) travelled by train and 9% (n=122) travelled by ‘bus and train ’.

Respondents travelling for leisure made up 26% of the total respondents (n=1,376). 15%(n=212) travelled by bus while 6%(n=84) travelled by train and 4%(n=60) by bus and train. Most of the respondents(13%, n=182) who travelled for education in the previous Friday travelled by bus.

Respondents travelling by train on Friday travelled mostly from stations like Leeds (16%), Huddersfield (9%), and Bradford (8%) . The main destination train stations were Leeds (46%), Bradford (7%), stations and outside West Yorkshire (7%).

The average bus journey was 36 minutes long and the average train journey was 41 minutes according to respondents. 89% (n=1,204) of the journeys made were return journeys.



Counts Base % Respondents	Base	On Friday: main reason for travel					
		Commute	Business Travel	Educatio-n	Leisure	Health	Other
Total	**1376**	**572** **41.6%**	**99** **7.2%**	**182** **13.2%**	**356** **25.9%**	**40** **2.9%**	**127** **9.2%**
Transport mode							
Train	**246** **17.9%**	121 8.8%	21 1.5%	12 0.9%	84 6.1%	- -	8 0.6%
Bus	**897** **65.2%**	329 23.9%	60 4.4%	151 11.0%	212 15.4%	38 2.8%	107 7.8%
Bus and Train	**233** **16.9%**	122 8.9%	18 1.3%	19 1.4%	60 4.4%	2 0.1%	12 0.9%

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken?
Base: Q9 = respondents who travelled in the previous Friday (n=1,376)

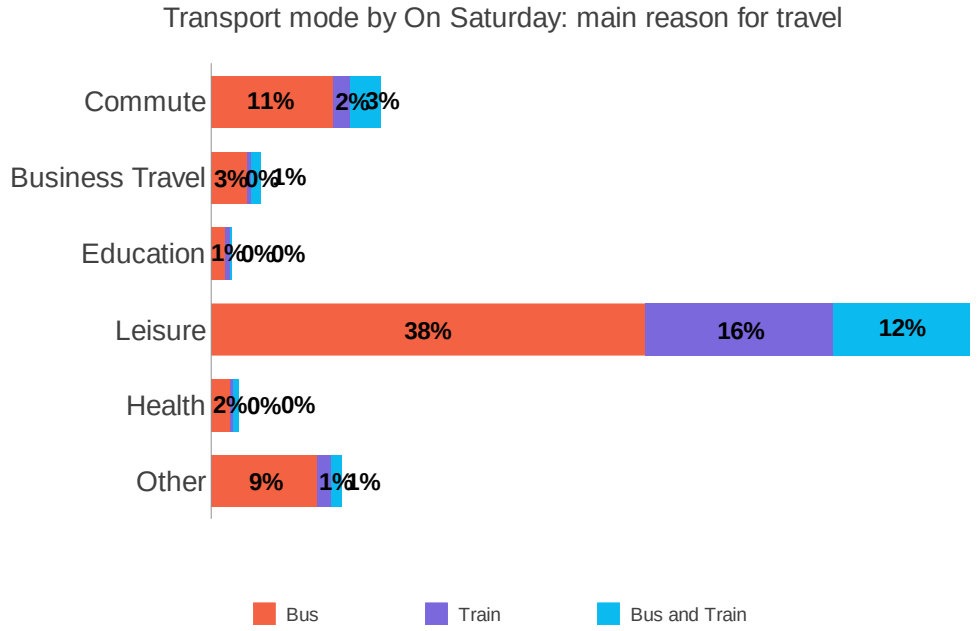
Saturday

In the previous Saturday, leisure was the main reason for travel for 66%(n=741) of respondents. 38%(n=424) of these people travelled by bus, while 16%(n=185) travelled by train and 12% (n=132) travelled by ‘bus and train ’.

Respondents commuting on a Saturday made up 15% of the total respondents (n=1,125). 11%(n=119) travelled by bus while 2%(n=17) travelled by train and 3%(n=29) by bus and train. Most of the respondents(2%, n=19) who travelled for education in the previous Saturday travelled by bus.

Respondents travelling by train on Saturday travelled mostly from stations like Leeds (19%), Bradford (8%), Huddersfield (6%), Halifax (6%) and outside West Yorkshire (5%) . The main destination train stations were Leeds (36%), outside West Yorkshire (12%) and Bradford (8%) stations.

The average bus journey was 33 minutes long and the average train journey was 46 minutes according to respondents. 88% (n=962) of the journeys made were return journeys.



Counts Base % Respondents	Base	On Saturday: main reason for travel					
		Commute	Business Travel	Educatio-n	Leisure	Health	Other
Total	**1125**	**165** **14.7%**	**47** **4.2%**	**19** **1.7%**	**741** **65.9%**	**26** **2.3%**	**127** **11.3%**
Transport mode							
Train	**227** **20.2%**	17 1.5%	4 0.4%	4 0.4%	185 16.4%	3 0.3%	14 1.2%
Bus	**714** **63.5%**	119 10.6%	35 3.1%	14 1.2%	424 37.7%	18 1.6%	104 9.2%
Bus and Train	**184** **16.4%**	29 2.6%	8 0.7%	1 0.1%	132 11.7%	5 0.4%	9 0.8%

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken?
Base: Q9 = respondents who travelled in the previous Saturday (n=1,125)

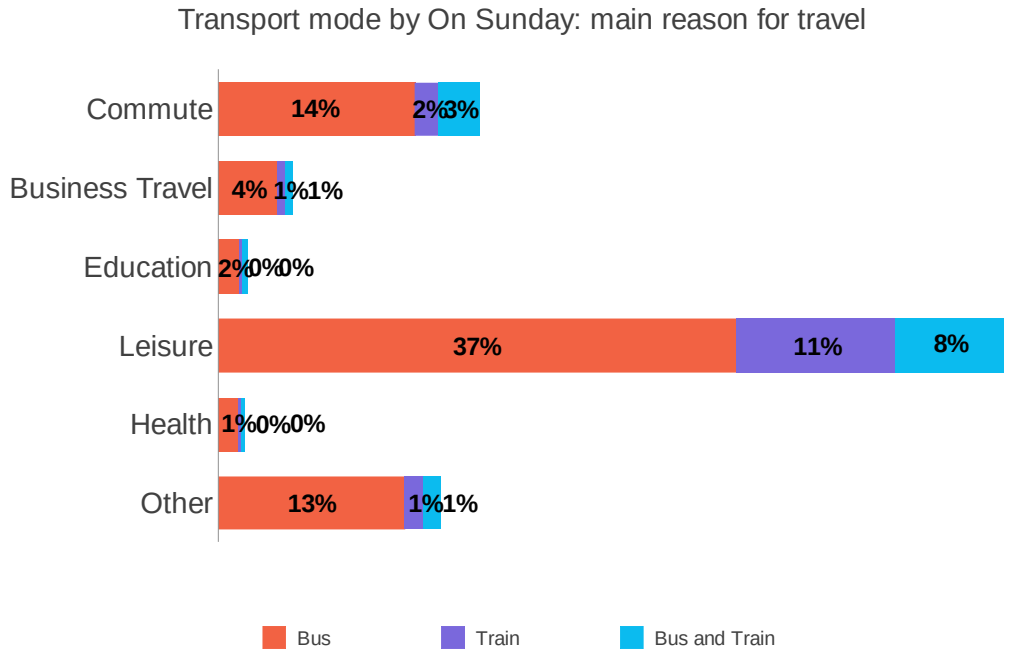
Sunday

In the previous Sunday, leisure was the main reason for travel for 56%(n=365) of respondents. 38%(n=241) of these people travelled by bus, while 11%(n=74) travelled by train and 8% (n=50) travelled by ‘bus and train ’.

Respondents commuting on a Sunday made up 19% of the total respondents (n=647). 14%(n=91) travelled by bus while 2%(n=11) travelled by train and 3%(n=19) by bus and train. Most of the respondents(2%, n=13) who travelled for education in the previous Saturday travelled by bus. A significant proportion (16%) travelled, mostly by bus, for other reasons.

Respondents travelling by train on Sunday travelled mostly from stations like Leeds (19%), Bradford (12%), outside West Yorkshire (8%) and Keighley (6%). The main destination train stations were Leeds (37%), outside West Yorkshire (14%) Bradford (6%) stations and Shipley (4%) .

The average bus journey was 33 minutes long and the average train journey was 46 minutes according to respondents. 88% (n=962) of the journeys made were return journeys.



Counts Base % Respondents	Base	On Sunday: main reason for travel					
		Commute	Business Travel	Educatio-n	Leisure	Health	Other
Total	**647**	**121** **18.7%**	**34** **5.3%**	**13** **2.0%**	**365** **56.4%**	**11** **1.7%**	**103** **15.9%**
Transport mode							
Train	**100** **15.5%**	11 1.7%	4 0.6%	1 0.2%	74 11.4%	1 0.2%	9 1.4%
Bus	**464** **71.7%**	91 14.1%	27 4.2%	10 1.5%	241 37.2%	9 1.4%	86 13.3%
Bus and Train	**83** **12.8%**	19 2.9%	3 0.5%	2 0.3%	50 7.7%	1 0.2%	8 1.2%

Source: Q9. In the last 7 days please describe how you travelled in terms of main reason for travel, mode of transport , origin destination and time taken?
Base: Q9 = respondents who travelled in the previous Sunday (n=647)

Travel Behaviour Summary

- The responses from the 7-day travel behaviour questions provide insights about how people travel on different days of the week and what patterns have been formed. Albeit this is a snapshot of travel behaviours where respondents were only asked to give answers about their previous 7-days at the start of the Autumn months(September to October).

- The main reason for travel between Monday and Thursday (average n=1,516) was commuting with leisure a distant second. The other reasons for travel (education, business and health) had a much lower number of respondents , not comparable to the main two reasons. The number of respondents who admitted to commuting were very similar between Monday and Thursday with an average of 724 respondents. Similar to the first 4 days, on Friday , commuting and leisure were the top two reasons for travel as well, however there is a drop in the number of people traveling overall (n=1,376) and commuting specifically(n=572) . Friday's travellers' number was lower by about 9% .

- The two weekend days show a similar behaviour pattern in terms of the main reasons for travel. Leisure was the main reason for travel with commuting a distant second. However, the number of people travelling is different with 1,125 total respondents travelling on Saturday and 326 total respondents traveling on Sunday (-71%). Compared to weekdays, the main reason for travel changed from commuting to leisure. The number of people travelling on Saturdays compared to Fridays is lower by 18% and compared to Monday to Thursday it falls by 26%. Sundays on the other hand is 79% below the Monday to Thursday average and 76% below the Friday number.

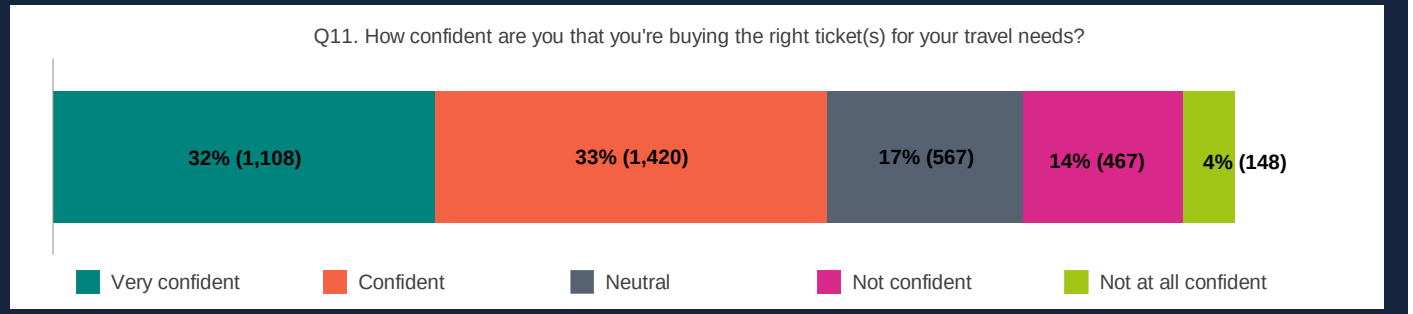
- For all 7-days of the week bus travel (only) was the most common means of travel among the main reasons for travel. The average bus journey time on all weekdays (Monday and Friday), where commuting is the main reason for travel, was quite similar and averaged out as 35 minutes long. On weekends, where the main reason for travel was leisure, the average journey time is only slightly lower at 33 minutes (-6%).

- Train(only) travel was the second highest proportion for respondents across 7-days. The responses tell us that the average train journey length for Monday to Thursday (where commuting was the main reason for travel) was shorter than Friday and the weekend (where most people travelled for leisure). Saturday and Sunday had average train journey times of 46 minutes respectively which falls to 41 minutes on Fridays. On the other four weekdays, the average train journey time is lower by 15% with an average length of 35 minutes.

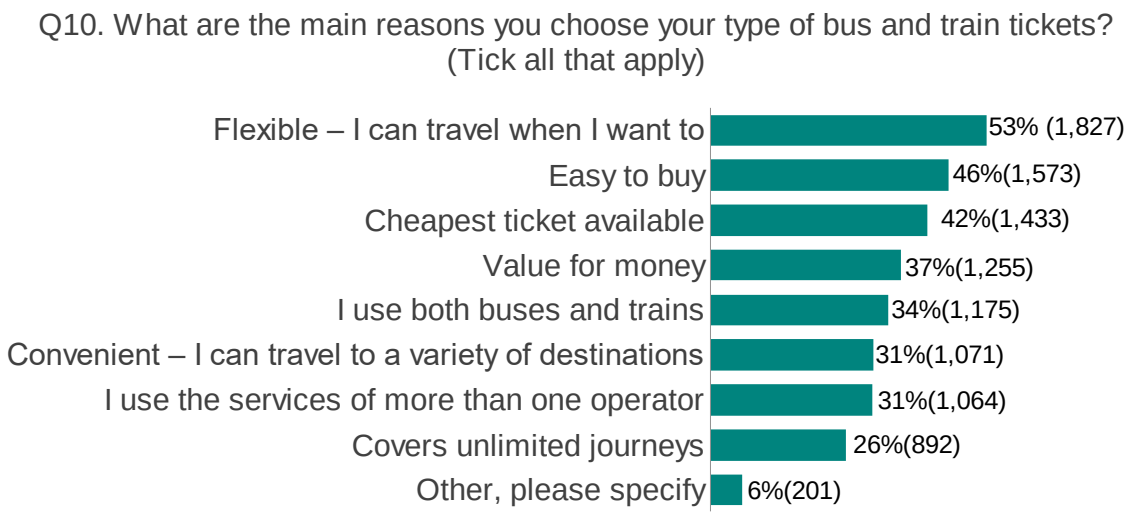
Ticket Choices

Respondents were asked to multi-select their main reasons for choosing a type of train or bus ticket. The reasons that were selected the most by respondents on how they choose their type of ticket was flexibility (53%, n=1,827) . ‘Easy to buy’ and ‘Cheapest ticket available’ come second and third with 46%(n=1,573) and 42%(n=1,433) respectively. Other reasons cited were health reasons, parking restrictions, environmental reasons and no other choices available. Please note, choices/reasons are independent of each other and respondents were able to choose several reasons at a time therefore the percentages for all reasons don’t add up to a 100%.

When asked how confident they were that tickets bought were right for their travelling needs, 65%(2,250) of respondents were either confident or very confident that their ticket met their travel needs. In comparison, 18% (n=615) had medium to low confidence in their choice of ticket.

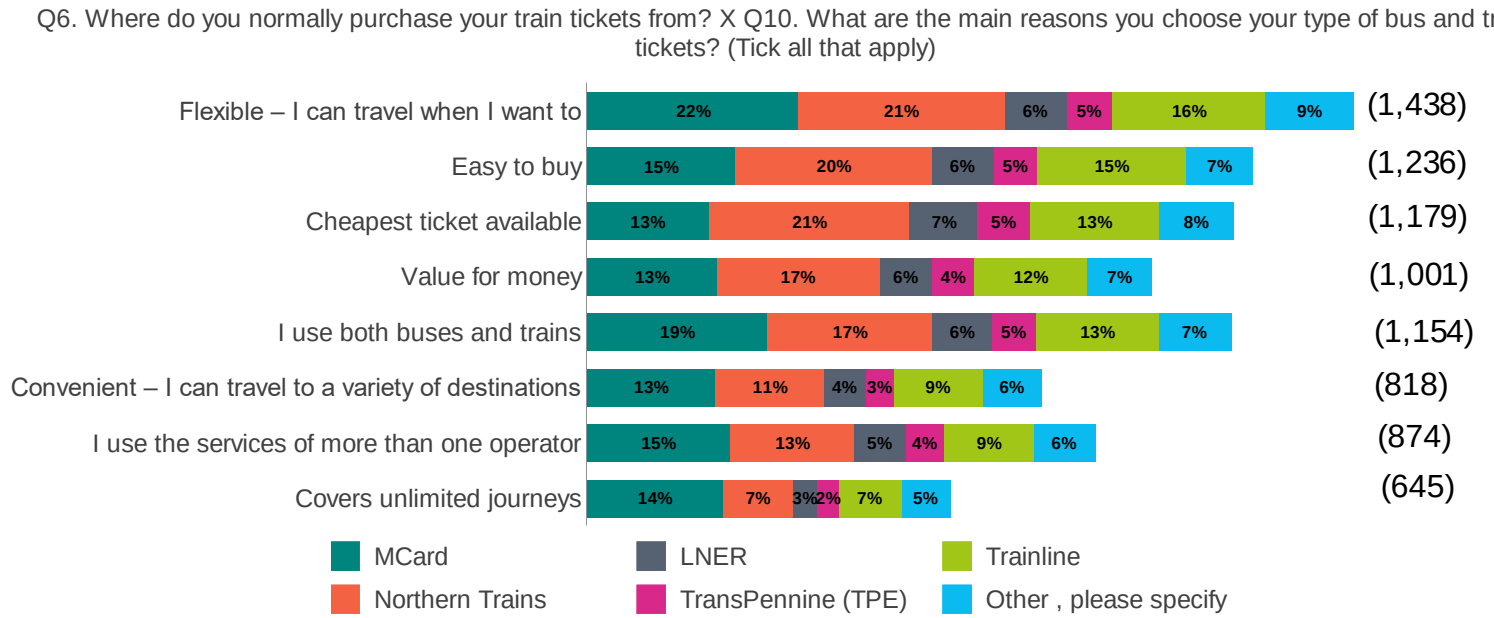


Source: Q10. What are the main reasons you choose your type of bus and train tickets? (Tick all that apply), Q11. How confident are you that you're buying the right ticket(s) for your travel needs?
Base:Q10 = all respondents(n=3,433), Q11 = all respondents(n=3,432)



Train Ticket Choices and Reason for Ticket Choices

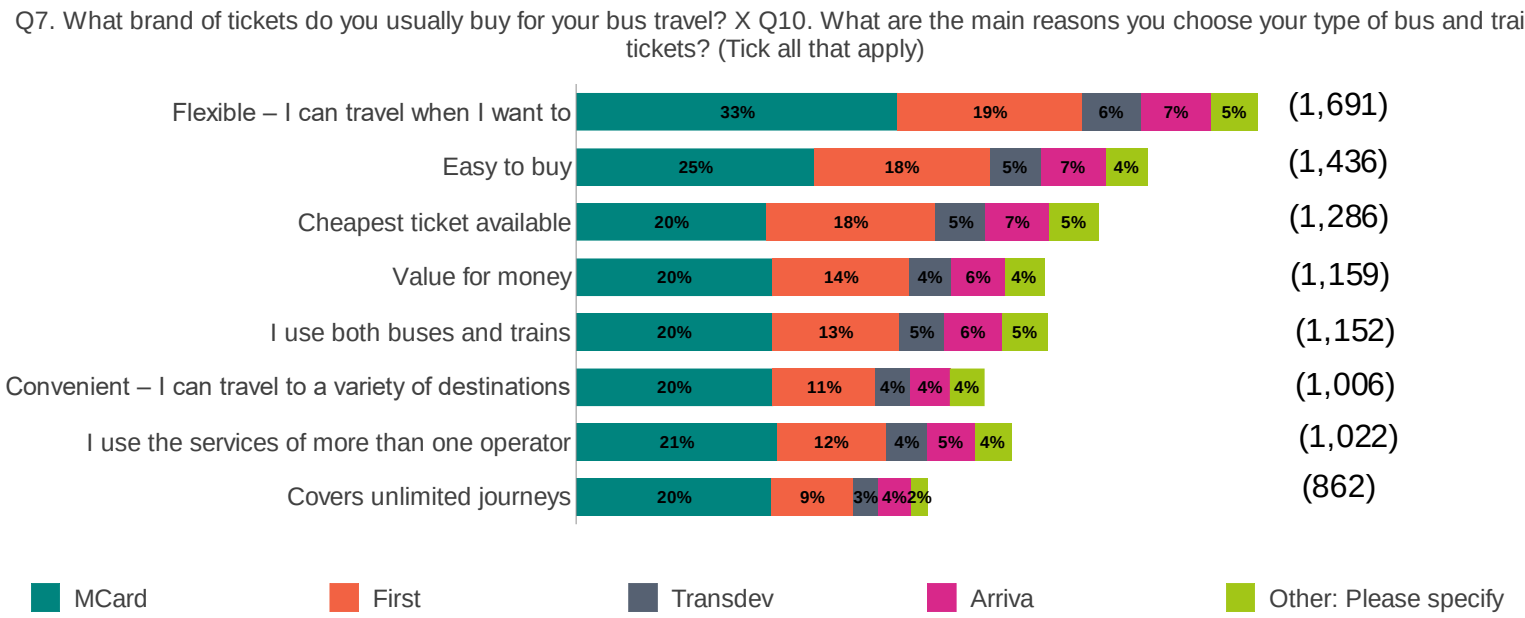
Combining the train ticket brand choices and the main reasons people chose their type of train and bus ticket shows that respondents who chose flexibility as one of their main reasons for choosing tickets also mainly bought from MCard(22%, n=578) and Northern Trains(21%, n=563) train tickets. Flexibility was the most widely selected reason for ticket choice(n=1,438). This was followed by “Ease to buy” and a good number of the people who chose this reason, bought their train tickets from Northern Trains (20%, n=537) followed by Trainline (15%, n=409) and MCard(15%, n=406). Respondents who chose their use for both buses and train as one of the main reasons for choosing bus and train tickets had MCard(19%, n=493) and Northern Trains(17%, n=453) as their main source of train tickets.



Source: Q10. What are the main reasons you choose your type of bus and train tickets? (Tick all that apply), Q6. Where do you normally purchase your train tickets from?
Base:Q10 & Q6 = respondents who responded to Q10 and Q6 (n=2,649)

Bus Ticket Choices and Reason for Ticket Choices

Respondents who answered the questions about their bus ticket brands and the reason for choosing a type of bus and train ticket were crossed together and shown in the chart. Of all the people who had flexibility as their main reason for choosing their bus and train tickets, one third (33%, n=1,010) of them bought their bus tickets from the MCard. Flexibility was the most common reason for choosing bus and tickets as stated already. “Ease to buy” was the second most popular reason and one in four people who chose this reason used the MCard for bus tickets.

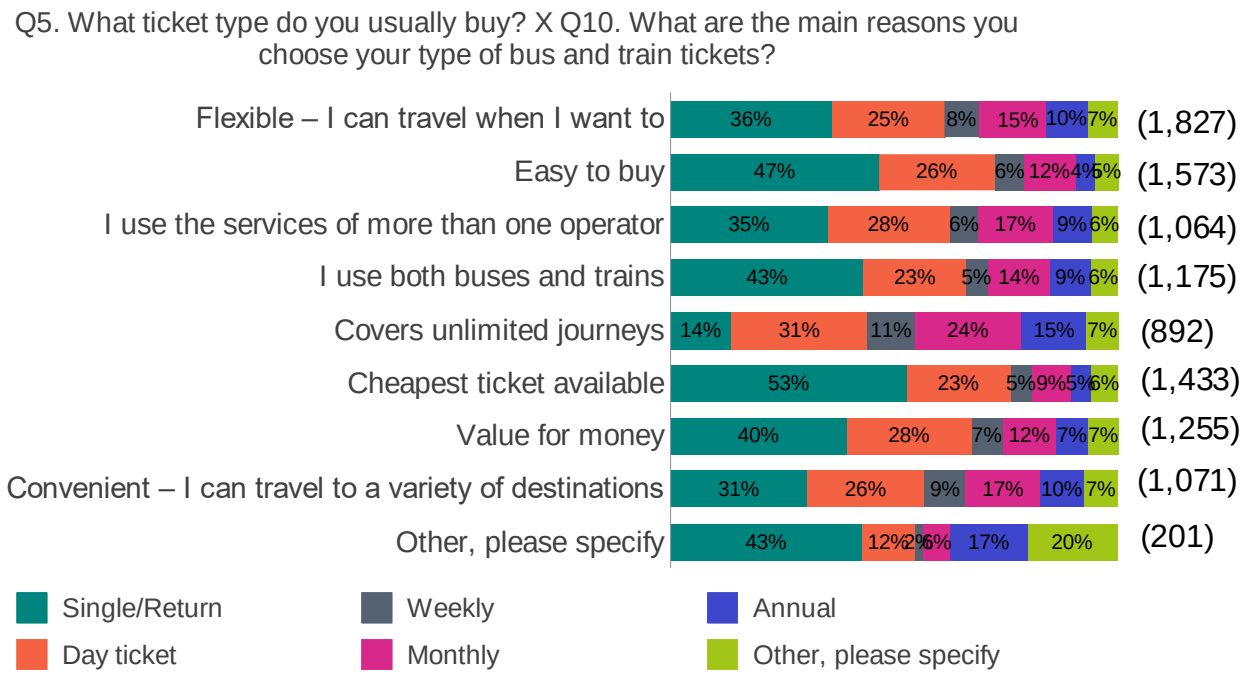


Source: Q10. What are the main reasons you choose your type of bus and train tickets? (Tick all that apply), Q7. What brand of tickets do you usually buy for your bus travel?
Base:Q10 & Q7= respondents who responded to Q10 and Q7 (n=3,022)

Reason for Ticket Choices by Ticket Type

The reason for ticket choices among respondents is shown according to the ticket type that respondents usually bought in the chart below.

Over 50% of respondents who chose “cheapest ticket available” as their reason for buying tickets usually bought single/return tickets. Day monthly and annual tickets holders chose “covers unlimited journeys” the most as their reason for choosing a ticket type.

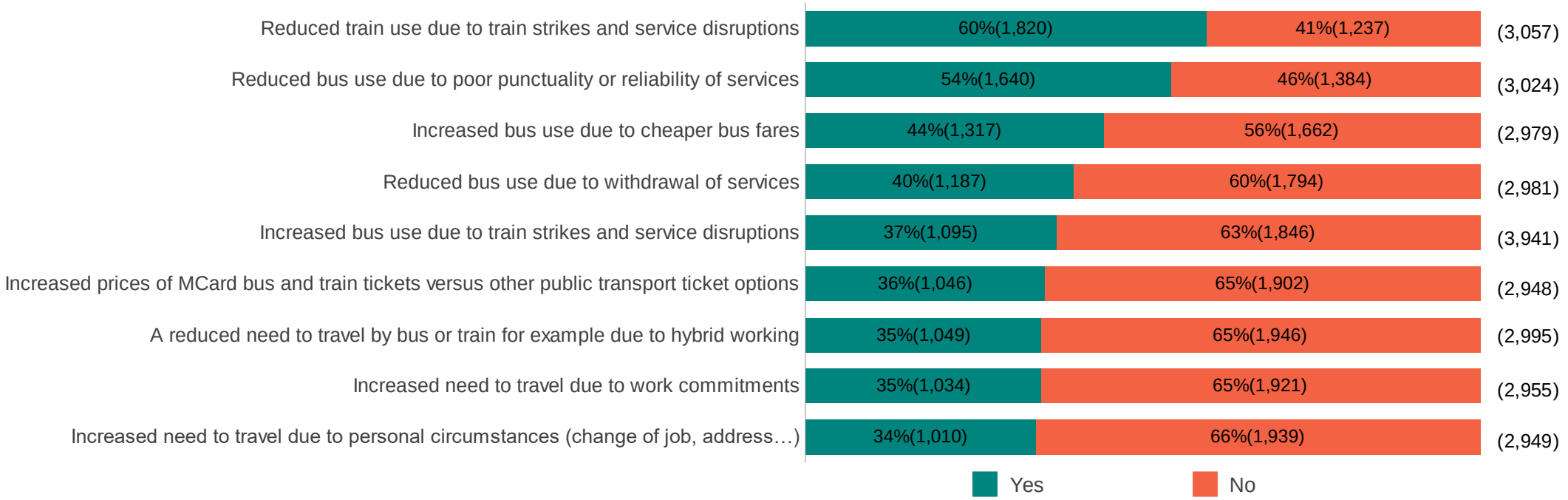


Source: Q5. What ticket type do you usually buy? X Q10. What are the main reasons you choose your type of bus and train tickets?
Base:Q10 & Q5= respondents who responded to Q10 and Q5 (n=varies)

Ticket Purchase Decisions

The chart below shows the most influencing factors for buying tickets with by ranking order. 60% (n=1,820) of respondents had reduced train use due to train strikes, as a major factor that influenced their ticket purchase decisions, and this was the highest among all factors. Reduced bus use due to poor punctuality or reliability of services was also cited as a major influence by a lot of respondents (54%, n=1,640). Increased need to travel due to personal circumstances has the highest proportion of respondents who said this was not a factor that influenced their ticket purchase. The chart below shows the most influencing factors with rankings . Other reasons mentioned by respondents as an influencing factor for buying tickets were , ‘ Lack of tickets to support flexible working and leisure travel in one’ , ‘climate emergency’, ‘limited places to buy monthly tickets’ and ‘Lack of clarity of pricing for journeys ’ .

Q12. In the past year or two, have your ticket purchase decisions been influenced by?

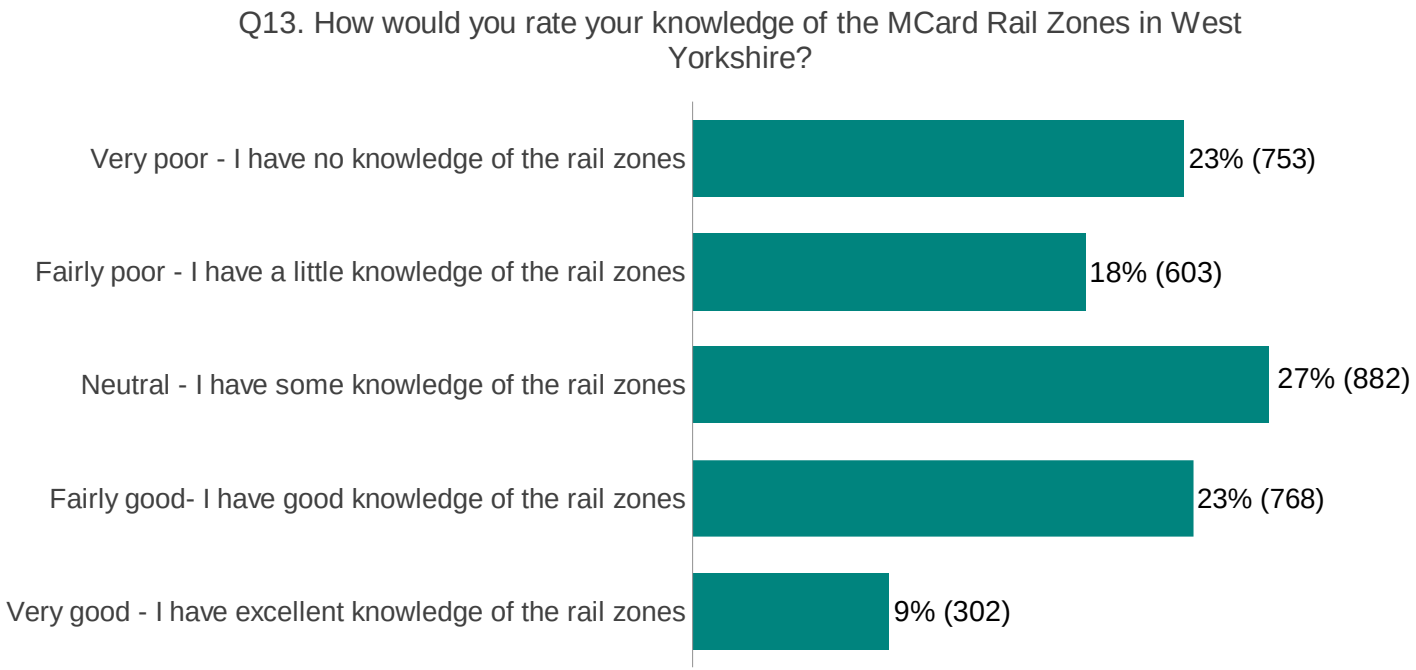


Source: Q12. In the past year or two, have your ticket purchase decisions been influenced by…? , not ordered a to i in chart
Base: Q12a = all respondents (n=2,995), Q12b = all respondents (n=2,981), Q12c = all respondents (n=3,024), Q12d = all respondents (n=3,057), Q12e = all respondents (n=2,948), Q12f = all respondents (n=2,955), Q12g = all respondents (n=2,949), Q12h = all respondents (n=2,941), Q12i = all respondents (n=2,979)

AWARENESS OF MCARD TICKETS

MCard Rail Zone Awareness

41% of respondents reported having a ‘fairly poor’ or ‘very poor’ knowledge of rail zones compared to 32% (n=1,070) who said their knowledge of rail zones was ‘fairly good’ or ‘very good’.



Source: Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire?
Base:Q13 = all respondents(n=3,308)

MCard Rail Zone Awareness by District

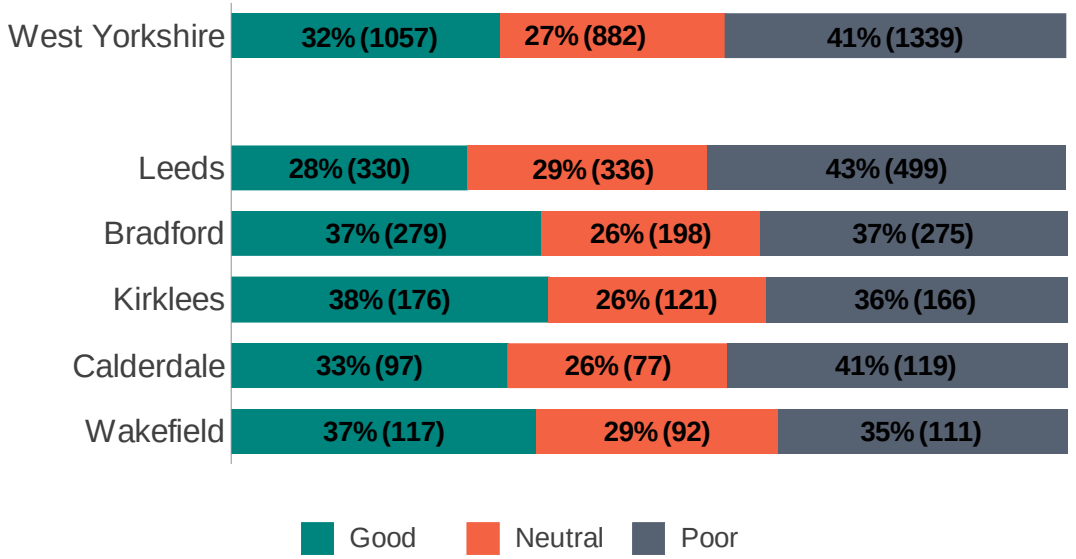
The percentage of respondents in Leeds (28%, n=330) that have a good knowledge of MCard rail zones is below the proportion of respondents who have a good knowledge of MCard rail zones in Bradford, Kirklees, Calderdale, and Wakefield.

MCard rail zone awareness broken down by district also shows more respondents in Leeds (43%, n=499) have said they have very poor knowledge of MCard rail zones compared to 37%(n=275) of Bradford respondents that also have poor knowledge of MCard rail zones .

In Wakefield 37%, (n=117) of respondents had good knowledge of MCard rail zones and a similar proportion of Kirklees respondents (38%, n=275) and Bradford respondents (37%, n=279) had good knowledge of MCard rail zones.

The percentage of people in each district that are neutral is almost the same.

Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire? X Q2. Which local authority district do you live in ?



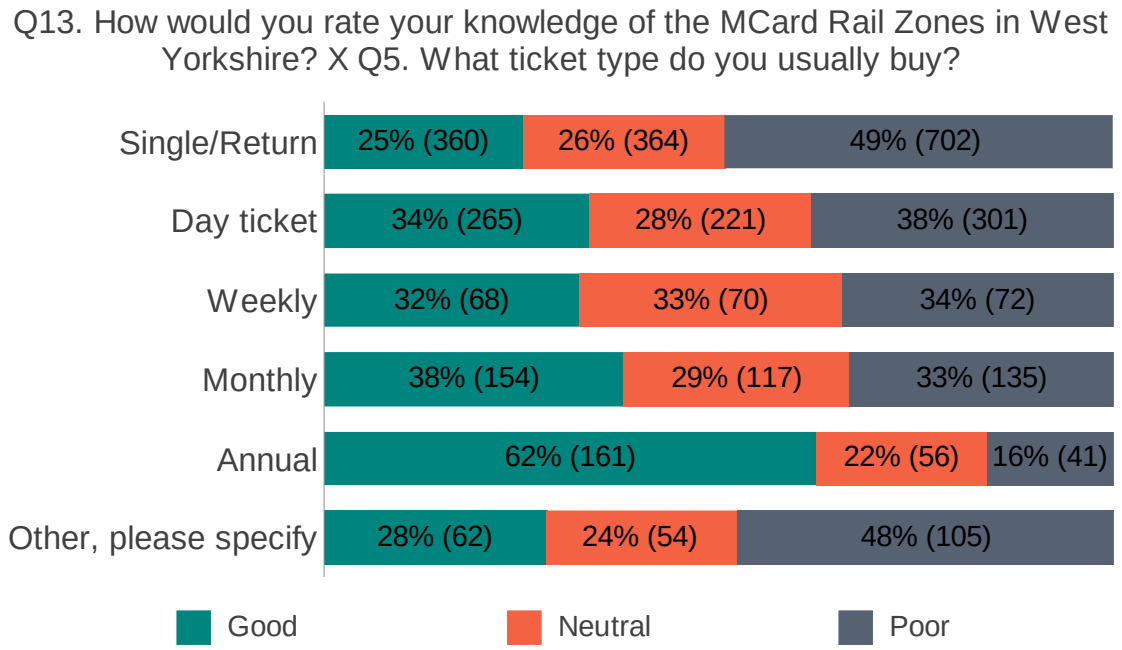
Source: Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire? X Q2. Which local authority district do you live in?
Base:Q13 and Q2 = all respondents(n=3,278)

MCard Rail Zone Awareness by Ticket Type

MCard rail zone awareness broken down by ticket type shows respondents with Annual ticket passes had the most awareness of MCard rail zones with 3 in 5 respondents(60%, n=161) acknowledging they have good knowledge.

Respondents who buy single/return tickets have poorest knowledge of MCard rail zones with only 25%(n=360) of respondents who use this type of ticket having good knowledge.

Weekly pass holders have an almost even split in awareness of MCard rail zones with 32%(n=68) of these respondents admitting to having good knowledge, 33%(n=70) neutral and 34%(n=72) poor.



Source: Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire? X Q5. What ticket type do you usually buy?
Base:Q13 and Q5= all respondents(n=3,308)

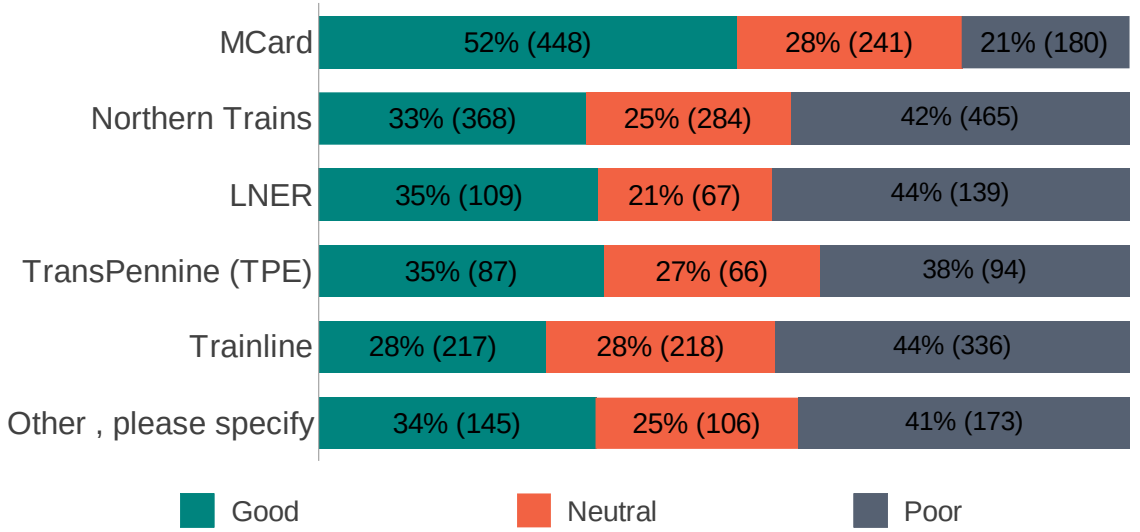
MCard Rail Zone Awareness by Ticket Type

The chart shows the MCard rail zones awareness broken down by the train ticket type that respondents used.

The MCard is the most widely used ticket type as this survey was promoted to MCard users and other associated channels. Of the respondents who use the MCard for train travel, about half (52%, n=448) of these respondents have good knowledge of MCard rail zones.

Respondents who use other train ticket types such as Northern Trains, LNER and Transpennine Express have a lower proportion of users who have good knowledge of MCard rail zones with 33%(n=368), 35%(109) and 35%(n=87) respectively.

Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire? X Q6. Where do you normally purchase your train tickets from?



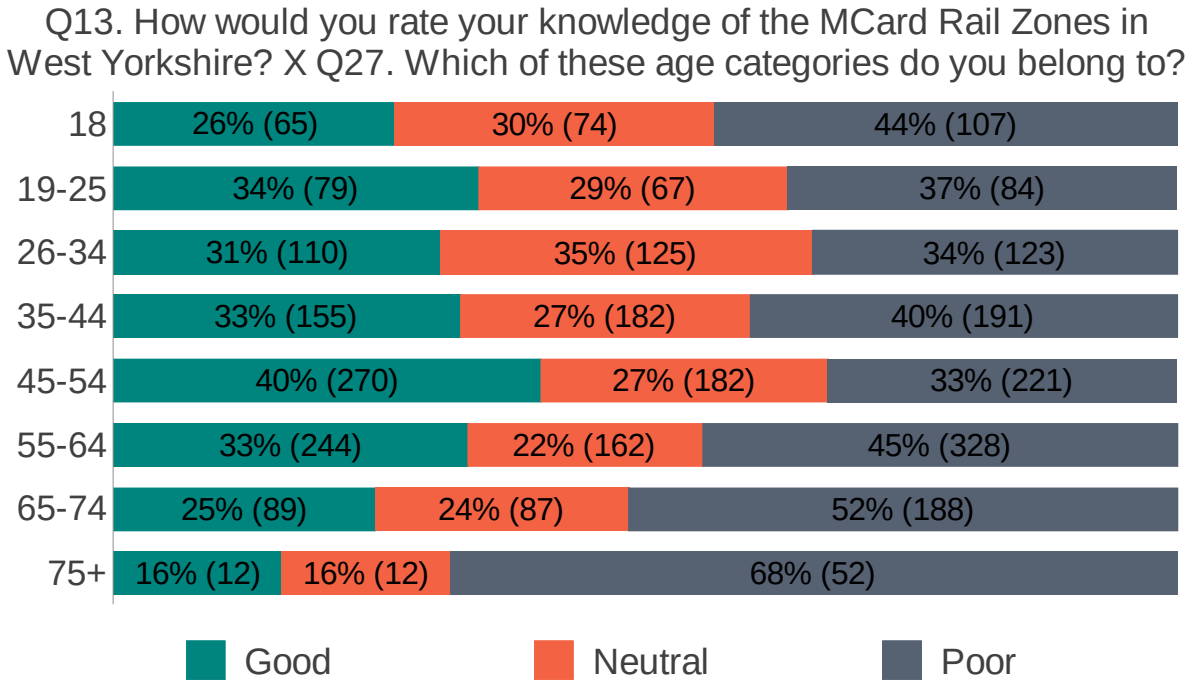
Source: Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire? X Q6. Where do you normally purchase your train tickets from?
Base:Q13 and Q6= all respondents(n=2,637)

MCard Rail Zone Awareness by Age

The chart below shows MCard rail zone awareness broken down according to age categories.

Respondents between age 45 and 54 have the largest proportion of people with good knowledge of MCard rail zones with 2 in 5 people admitting to this (n=270) and this is the most highly represented age range in the data.

In terms of poor knowledge of MCard rail zones, respondents 65 and over have the largest percentage of respondents who stated this. 18-year-olds (44%, n=107) and 55–64-year-olds (45%, n=328) also have a high percentage of respondents with poor knowledge of MCard rail zones showing a knowledge gap in these groups.



Source: Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire? X Q27. Which of these age categories do you belong to?
Base:Q13 and Q27 = all respondents(n=3,156)

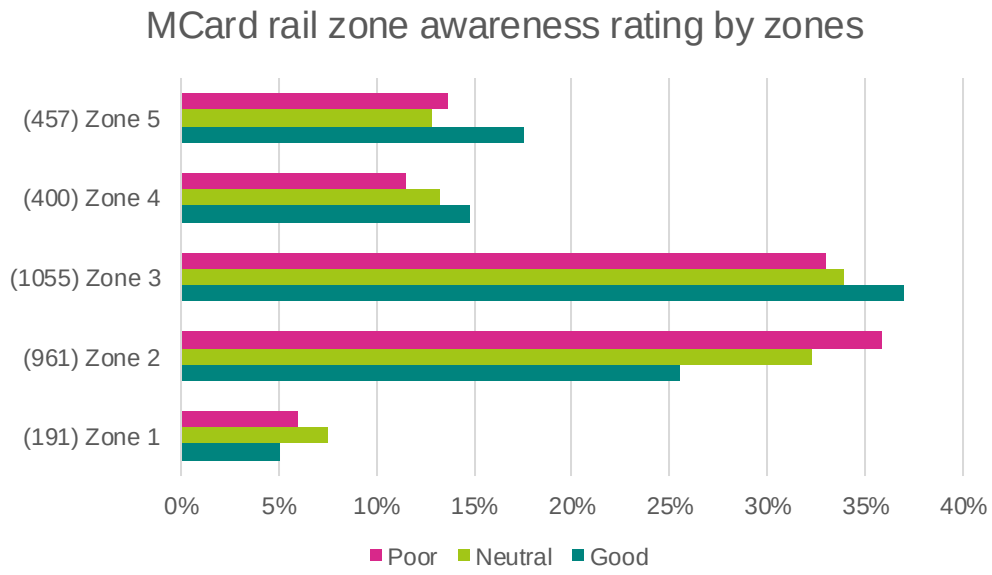
MCard Rail Zone Awareness by Age

Postcode data was used to assign rail zones to respondents by finding the closest rail station to the respondent's postcode and assigning the rail zone of that rail station to the respondents' data.

The chart below illustrates MCard rail zone awareness according to the respondent's resident rail zone.

The results show that respondents living in Zone 3 (n=1,055) and Zone 2 (n=961) are the most represented in the survey. The zone with the highest proportion of respondents with good knowledge of MCard rail zones is Zone 3 while the zone with the highest proportion of respondents with poor knowledge of MCard rail zones is Zone 2.

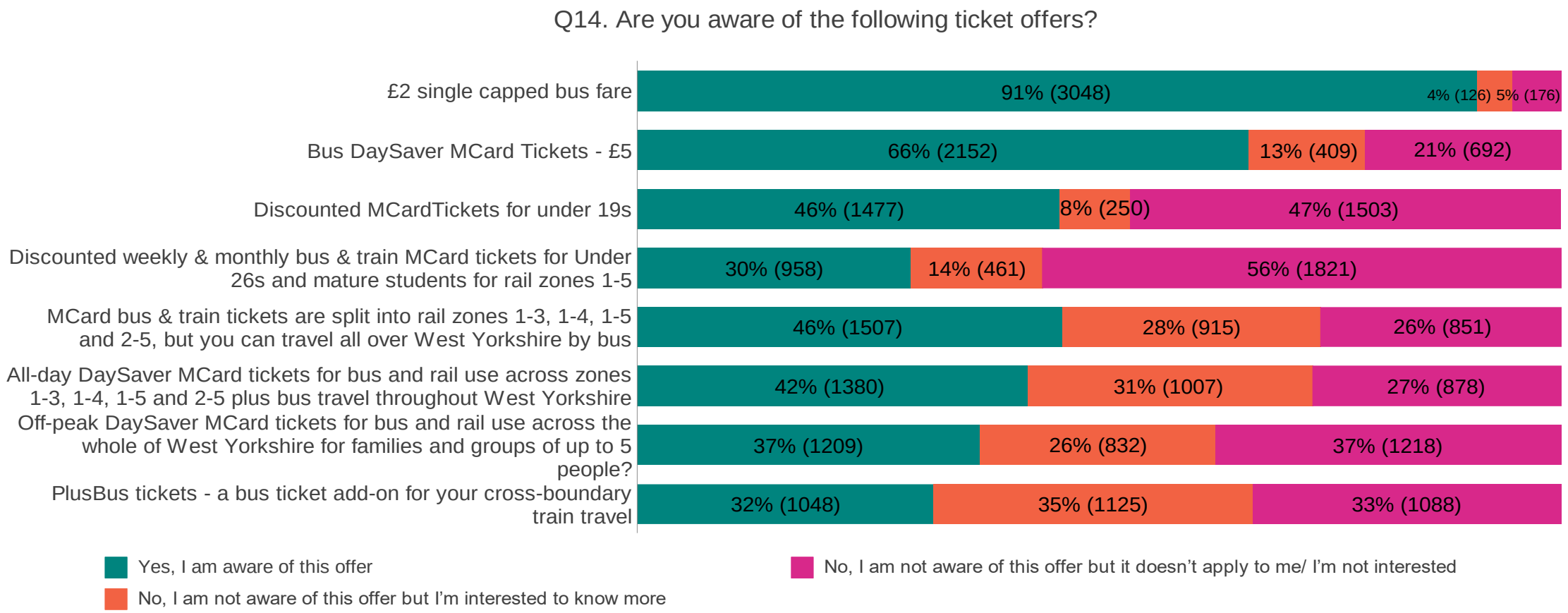
There is a comparable amount of people with good and bad knowledge of the MCard rail zones in each zone. The chart shows there is no correlation between the resident zone of respondents and their knowledge of the MCard rail zones.



Source: Q13. How would you rate your knowledge of the MCard Rail Zones in West Yorkshire? X Q1. What is your postcode?
Base:Q13 and Q1 = all respondents(n=3,064)

Ticket Offers

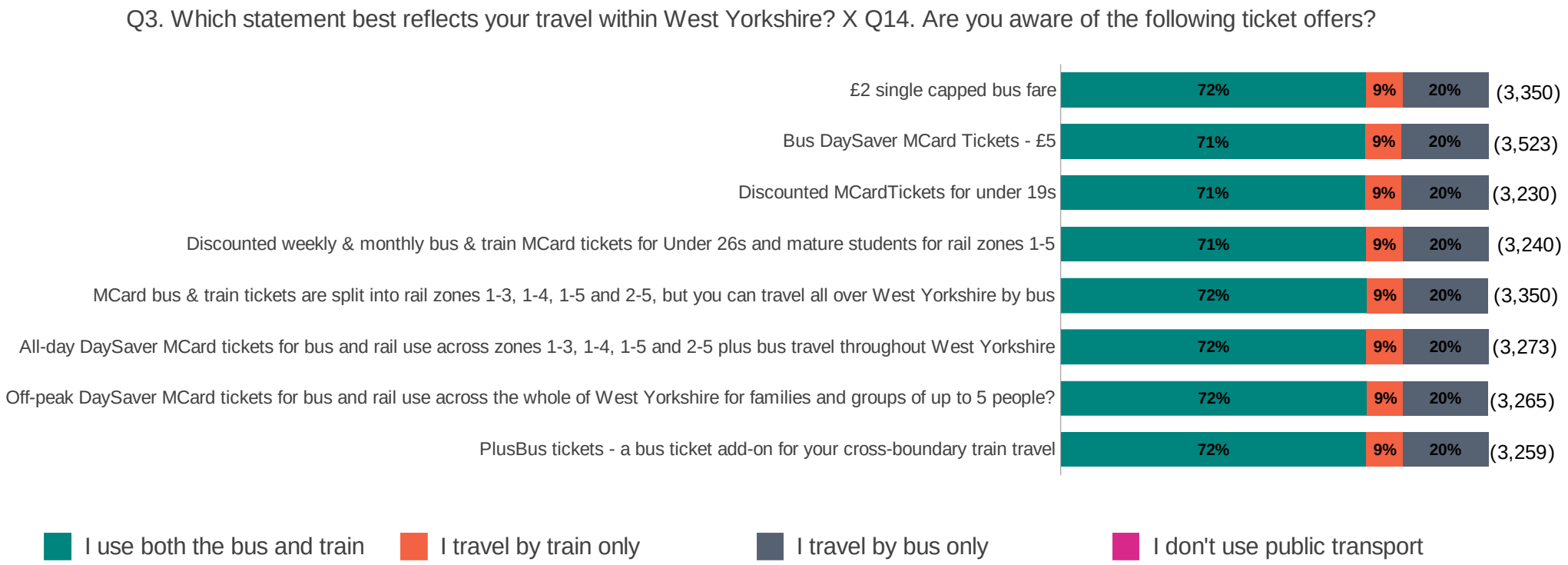
Respondents were asked about awareness of ticket offers. 91% (n=3,048) of respondents were aware of the £2 single capped bus fare. The Bus DaySaver MCard Ticket for £5 had the second highest level of awareness (66%, n=2,152). 35% (1125) of respondents stated they were unaware of PlusBus tickets but would like to know more. Off-peak DaySaver MCard tickets for bus and rail use across the whole of West Yorkshire for families and groups of up to 5 people is the offer that most respondents stated they were not aware of and did not think it applied to them, or they were not interested in this offer.



Source: Q14. Are you aware of the following ticket offers? Offers shown in the chart
Base:Q14 = all respondents (n varies)

Ticket Offers by Mode Choice

Respondents asked about awareness of ticket offers are broken down by their mode of travel in the chart. This was a multi-select question which allowed respondents to choose more than one ticket offer. An average of 71% (average n~2,335) of respondents that are aware of each ticket offer use both the bus and the train.



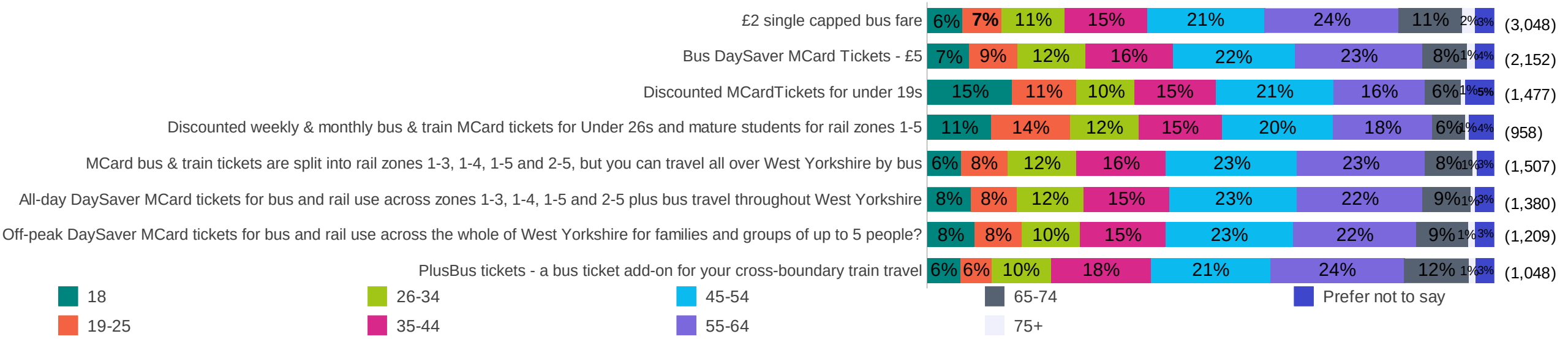
Source: Q14. Are you aware of the following ticket offers? Offers shown in the chart X Q3. Which statement best reflects your travel within West Yorkshire?
Base:Q14 = all respondents(n varies)

Ticket Offers by Age Categories

Awareness of ticket offers are broken down by age categories in the chart. The ticket offer awareness question was a multi-select question which allowed respondents to choose more than one ticket offer.

A similar proportion of respondents from each age category are aware of the ticket offers. 55–64-year-olds have the most awareness among all age categories of these ticket offers with an average of 22% awareness of all ticket offers. 45–54-year-olds are not far behind.

Q27. Which of these age categories do you belong to? X Yes - Q14. Are you aware of the following ticket offers?



Source: Q27. Which of these age categories do you belong to? X Q14. Are you aware of the following ticket offers?
Base:Q14 & Q27 = all respondents(n varies)

PRICE

MCard Bus and Rail Survey

Price

The average amount that respondents spend monthly on public transport is £64.87 and the highest amount a respondent spent was £1,240 with the lowest amount being 0. People who spent no money are most likely dependents, concessionary ticket holders and respondents in an MCard Corporate Scheme.

The median amount paid by residents was £48 while the standard deviation was £74.16.

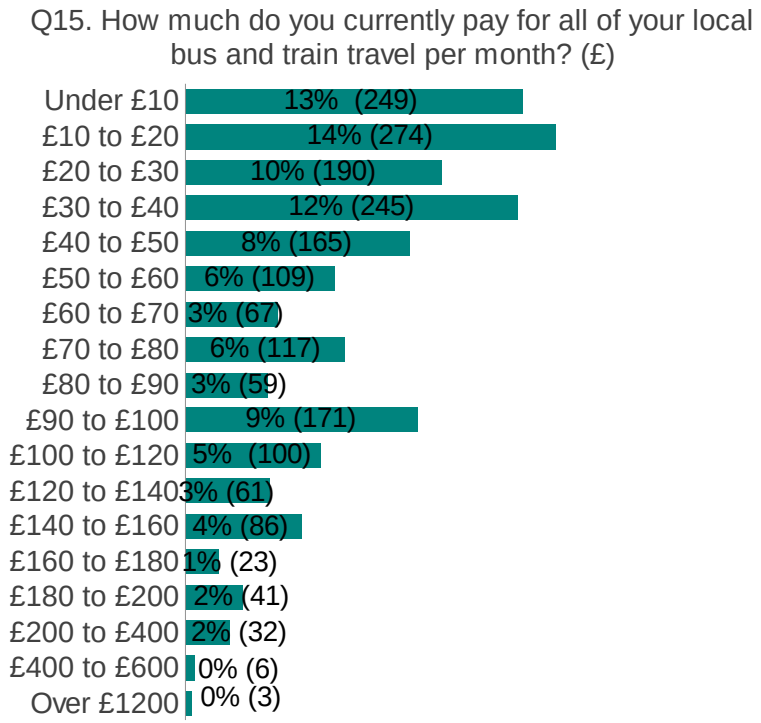
In the table below, there are statistical descriptions of the amounts people paid for local bus and train travel that give insight to the spread and validity of the data collected. Please see appendix for the definition of statistical terms.

Counts Respondents	Total	Descriptive Statistics														
		Count	Minimum	Maximum	Range	Mode	1st Quartile	Median	3rd Quartile	Mean	Standard Deviation	Variance	Skewness	Kurtosis	Sample Standard Deviation	Sample Variance
Q15. How much do you currently pay for all of your local bus and train travel per month? (£)	**3549**	1998	0	1240	1240	0	20	48	93	64.87	74.16	5499.38	6.07	74.23	74.18	5502.13

Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£)
Base:Q15 = all respondents(n=1,988)

Price

- The illustration shows the spread of money spent on local bus and train travel per month broken down into price ranges.
- Respondents who spent between £10 and £50 were the most represented with 44% (n=874) of respondents falling within this spend category. The smaller percentages come from respondents in the higher spend brackets (£200 and over, n=41).
- This shows there are more respondents on the lower end of the spend range than on the higher end. This compared to how much respondents spend on car travel will give some insight into the potential for mode shift with improvements to other barriers to public transport use.

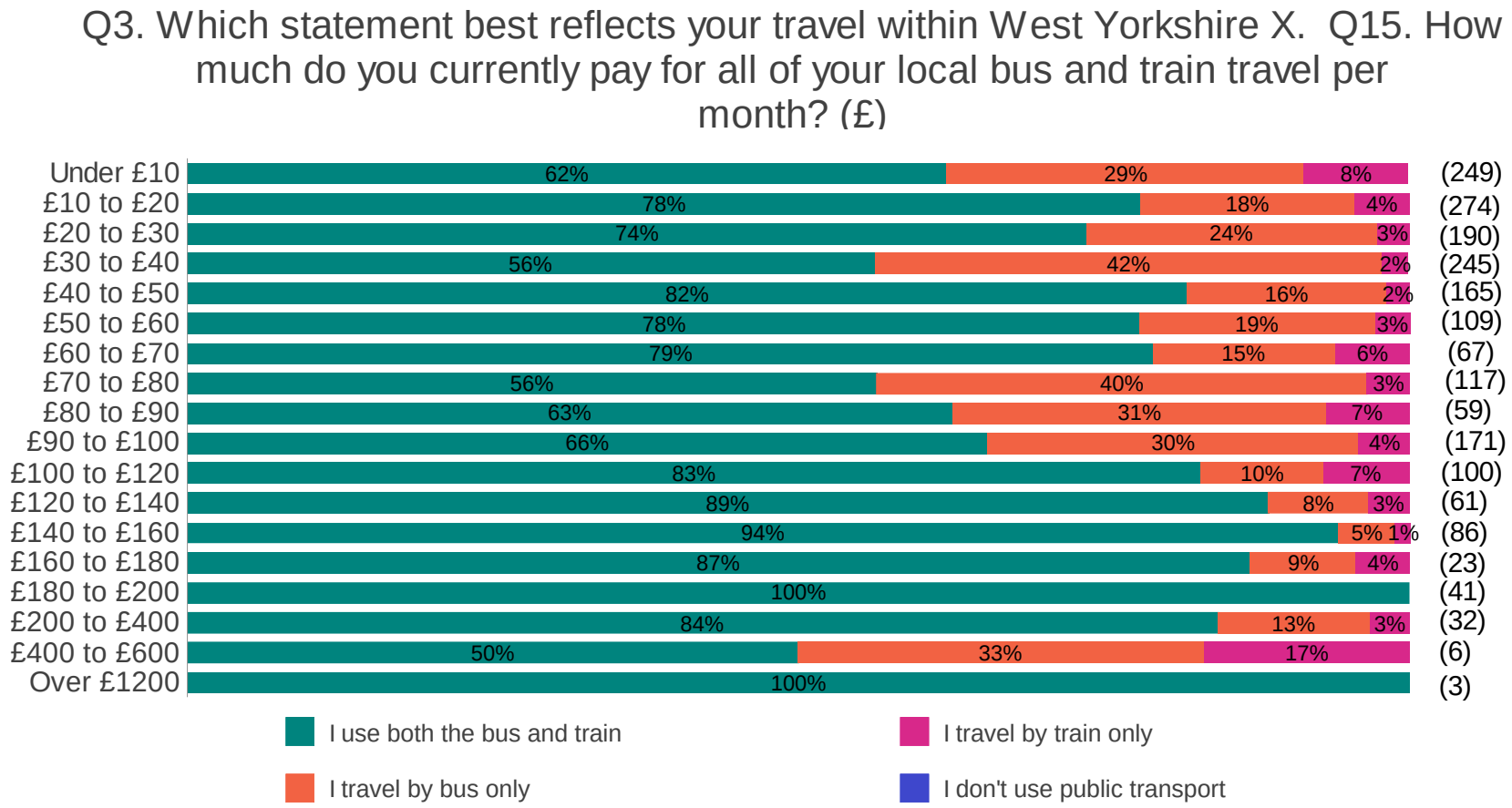


Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£)
Base:Q15 = all respondents(n=1,988)

Amount Spent by Mode Choice

The average amount spent on local public transport according to transport modes varies as shown in the chart .

Respondents who travel by train and bus are the most represented among all price ranges.

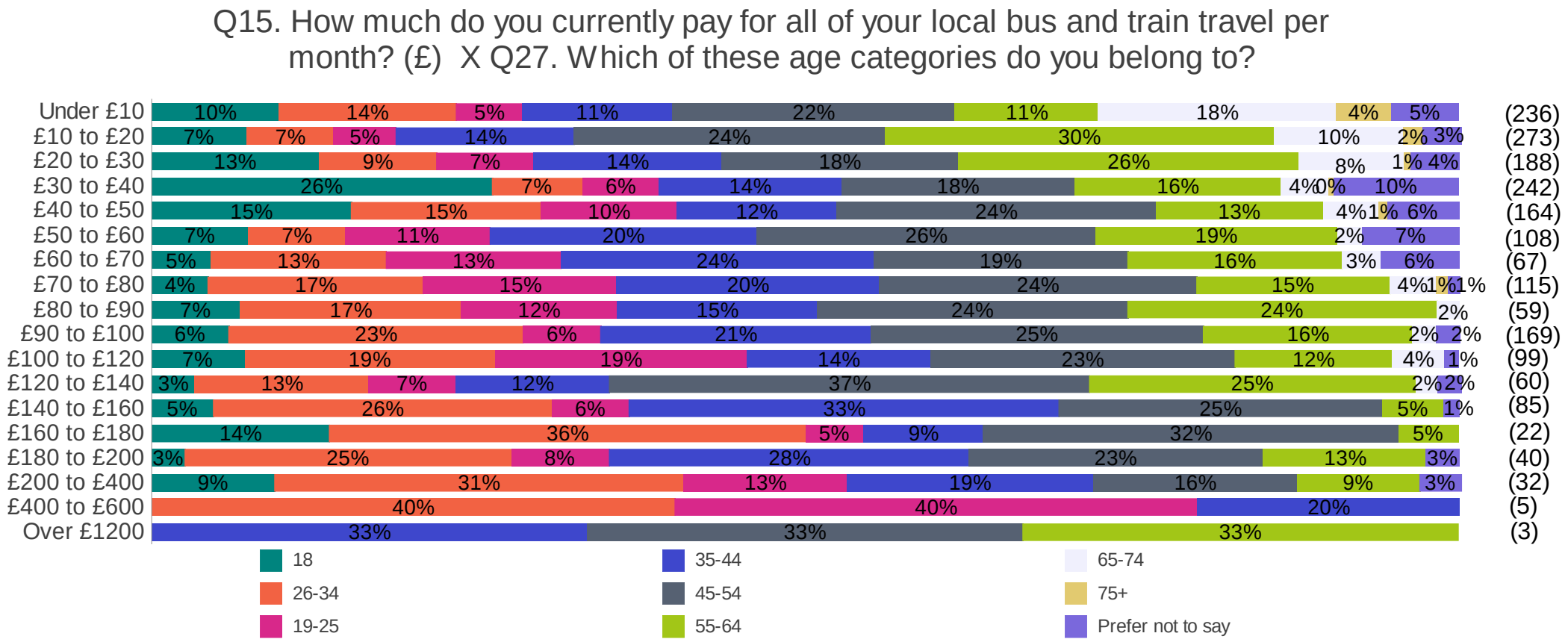


Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£) X Q3. Which statement best reflects your travel within West Yorkshire?
Base: Q15 and Q3= all respondents,(n=1,998)

Amount Spent by Age Categories

The amount spent on local bus and train travel per month in price ranges when broken down by age categories gives some useful insight.

Of the respondents who spent less than £10, the majority were in the age range 45-54(22%, n=51).55-64-year-olds(30%,n=81) are the most represented age range for spending between £10 and £20. For spending between £30 and £40 , 18-year-olds(26%, n=63) are the most represented. The total number of people spending higher than £400 is too small a sample size to draw any meaningful conclusions.



Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£) X Q27. Which of these age categories do you belong to?
Base:Q15 and Q27 = all respondents(n=1,967)

Amount Spent by Employment Status

The chart shows the spread of the amount spent on local bus and train travel per month by the employment status of the respondents.

Up to the price range £200 to £400 (less than 6 respondents per price range), there is a reasonable amount of sample size from which we can draw some conclusions. About three-fifths of respondents, who pay in the age ranges of less than £10(61%, n=126) and between £10 and £50(64%, n=515) are employed. As the price ranges rise ticket prices are less affordable to unemployed respondents.

Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£) X Q30. What is your current employment status?
Base:Q15 and Q30 = all respondents(n=1,967)

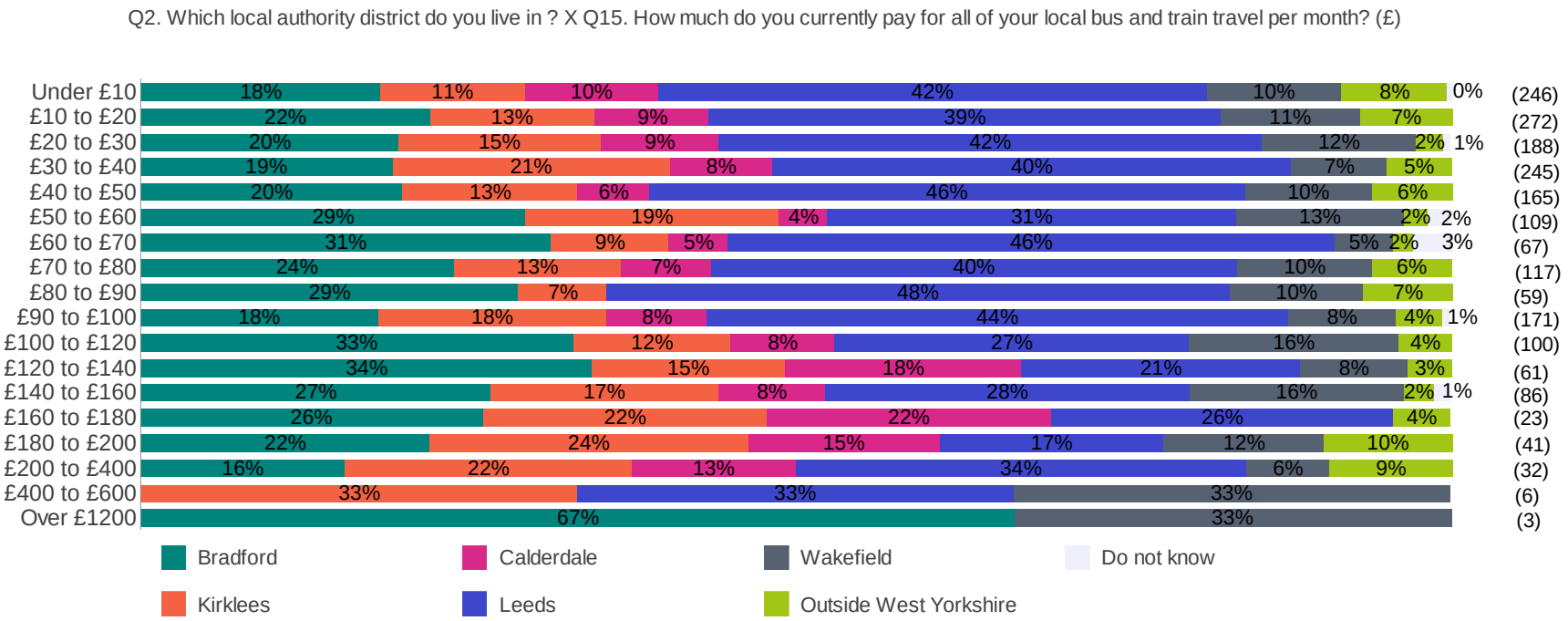
Amount Spent according to Car Access

Breaking down money spent by respondents on local bus and train travel per month by car ownership or access to a car shows under £400 more people who do not own a car or have access, spend lower amounts when they use public transport. It is important to note that the park and ride scheme might be an influential factor for those who drive part way and take public transport part way. Under £400, respondents who spend between £10 and £20(64%, n=170) had the most access to a car.

Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£) X Q32. Do you own or have access to a car as a driver or a passenger?
Base:Q15 and Q32 = all respondents(n=1,937)

Amount Spent by District

Amount spent by respondents on local bus and travel per district shows for spending under £100, Leeds is the most represented district in all price ranges. Leeds is followed by Bradford in terms of representation under £100 spend .



Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£) X Q32. Do you own or have access to a car as a driver or a passenger?
Base:Q15 and Q32 = all respondents(n=1,991)

RETAIL

Ticket Sales Location

When asked where they usually buy tickets respondents multi-selected from the list of options shown in the chart. Options not provided, could be stated in a literal response box after selecting “Other, please specify”. Please note, the percentage respondents do not add up to a 100% because some respondents selected several ticket shops. Each choice is calculated as a percentage of the total and calculated independently of other choices.

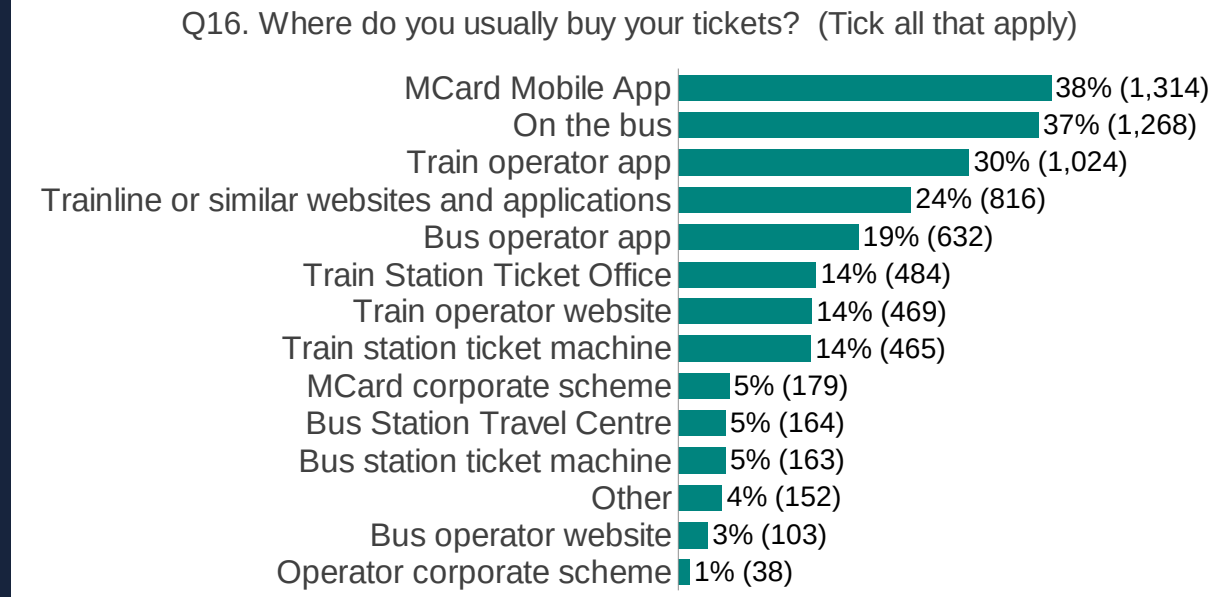
This survey was promoted through the MCard website, newsletters, and other associated channels, therefore the answers in this question has a skew towards MCard users.

38% (n=1,313) of respondents used the MCard app to buy tickets which is the largest proportion.

Buying tickets on the bus was also a popular choice at 37% (n=1,268).

Train operator apps, Trainline and similar websites and applications were also within top 5 preferred ways of purchasing tickets.

Source: Q16. Where do you usually buy your tickets? (Tick all that apply), Base:Q16 = all respondents(n= varies) ,



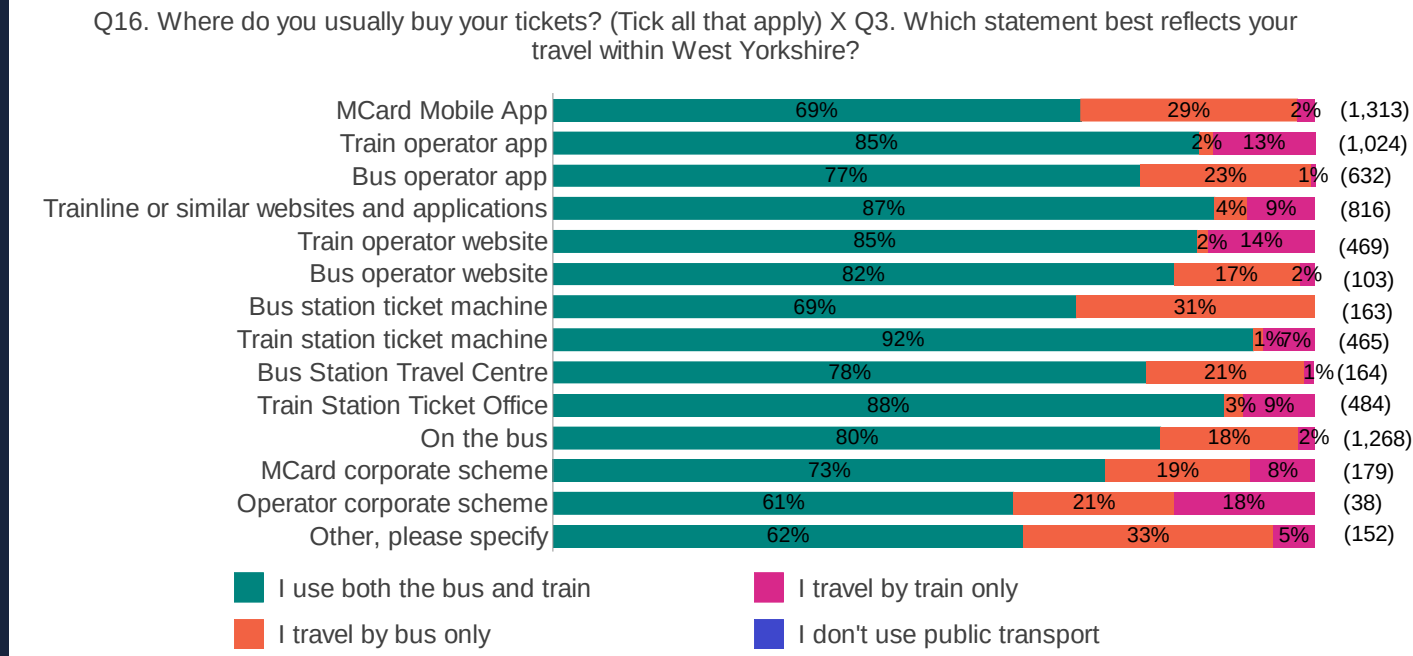
Ticket Sales Location by Modes

Where respondents buy their tickets is broken down according to their mode of travel in the chart.

Overall, for all ticket sales locations listed , respondents who use both bus and train were in the highest proportion for each ticket sale location.

Of respondents who purchased tickets from the MCard app, 69%(n=910) were bus and train users while 29%(n=374) were bus only users and 2%(n=29) were train only users.

Respondents who use the MCard Corporate Scheme are mostly bus and train users aswell with 73% (n=130) of respondents admitting to this.

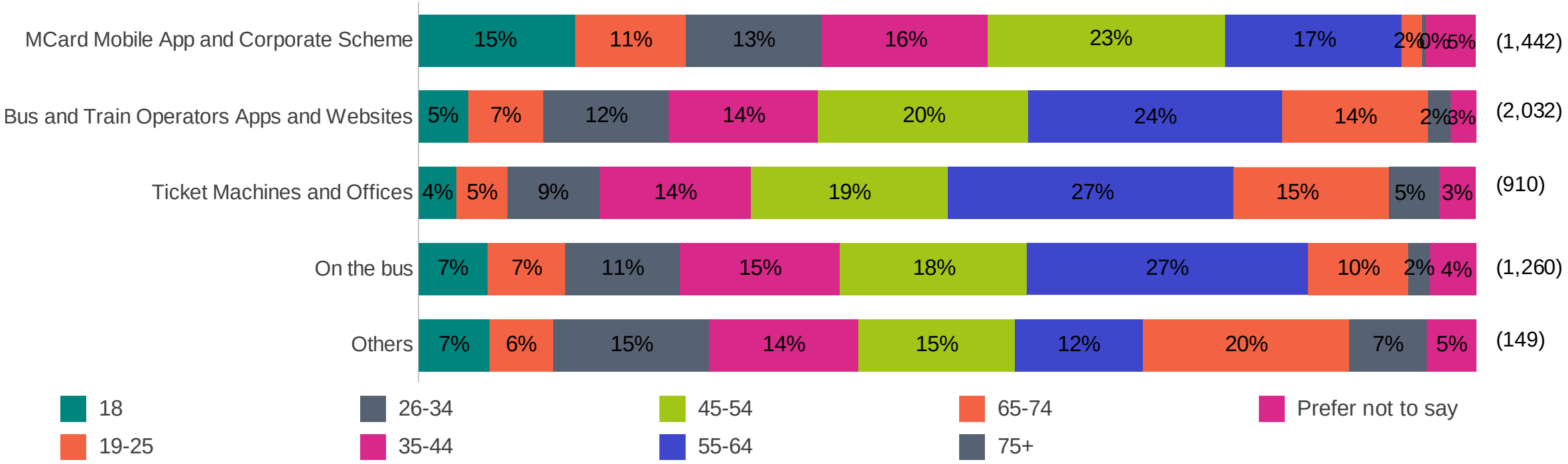


Source: Q16. Where do you usually buy your tickets? (Tick all that apply) X Q3. Which statement best reflects your travel within West Yorkshire?),
Base:Q16 & Q3= all respondents(n= varies)

Ticket Sales Location by Age

How people bought tickets broken down according to age categories shows that, of the age ranges who use the MCard app to buy tickets,45–54-year-olds use the MCard app and the Corporate Scheme the most (23%, n=324). The MCard app is also widely used by 18-year-olds (15%, n=213) , 35–44-year-olds(15%, n=226),and 55–64-year-olds (17%, n=241).

Q16. Where do you usually buy your tickets? (Tick all that apply), X Q27. Which of these age categories do you belong to?

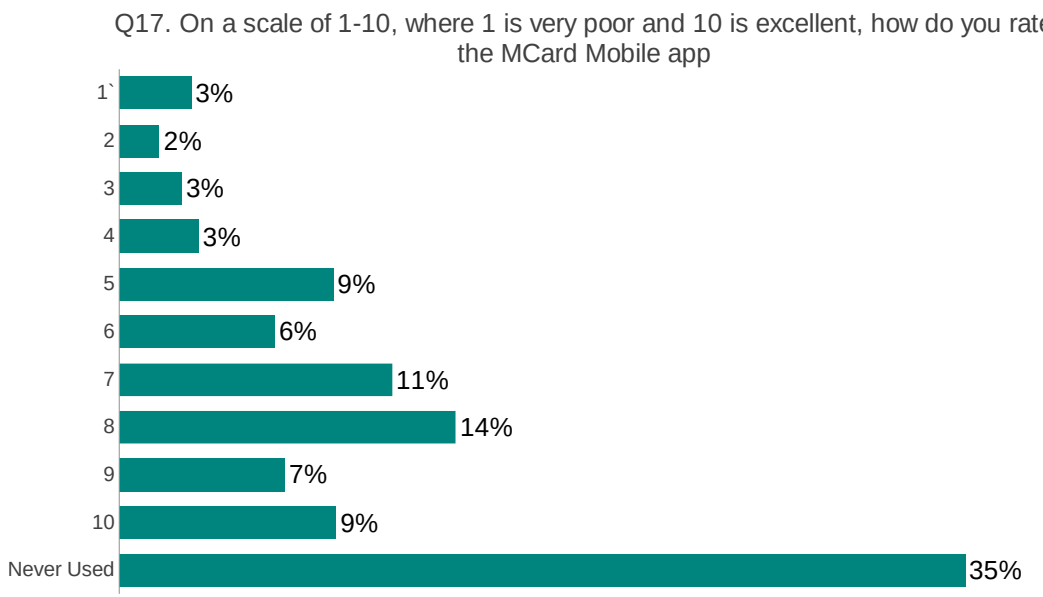


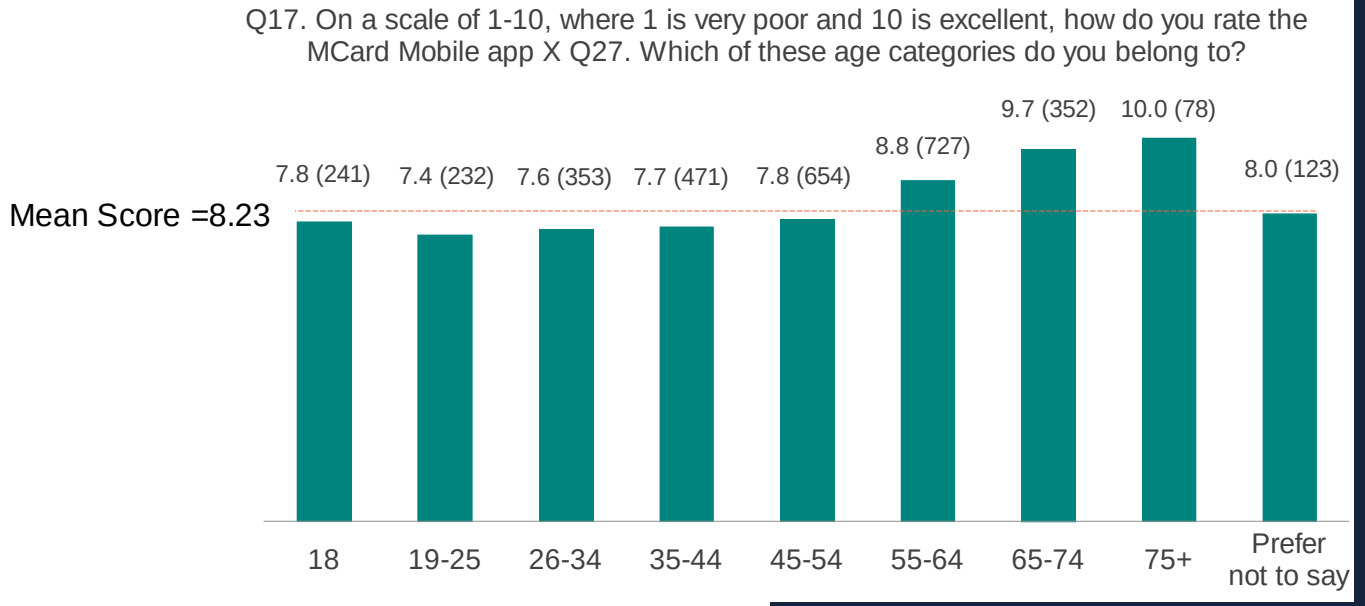
Source: Q16. Where do you usually buy your tickets? (Tick all that apply), X Q27. Which of these age categories do you belong to?
Base:Q16 and Q27 = all respondents (n= varies)

MCard App Rating

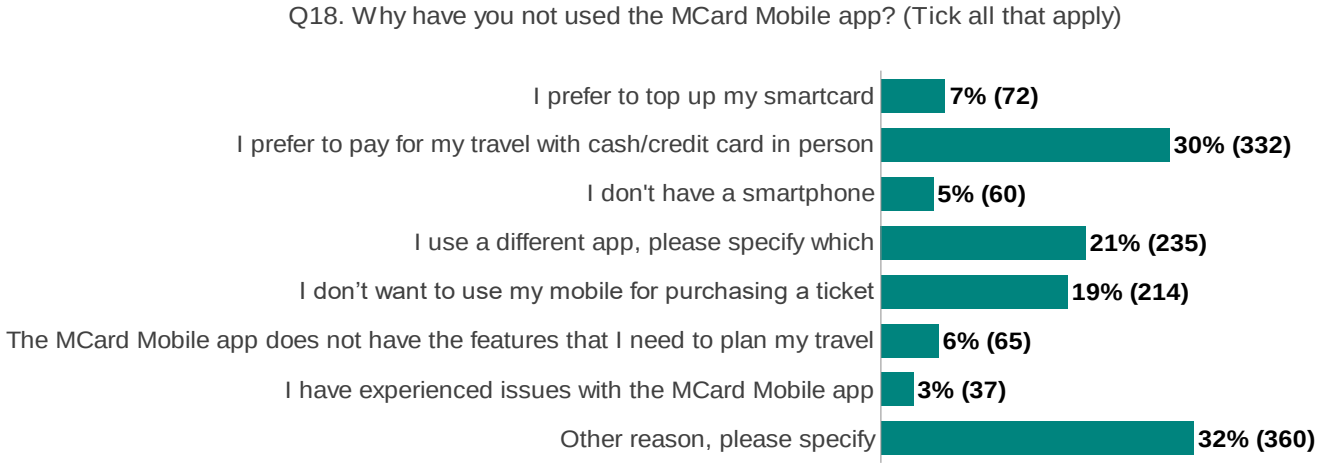
Respondents were asked to rate the MCard from 1 to 10. Over a third of respondents (35%, n=1,123) said they had never used the MCard app before. The mean and the median score among respondents was 8.23 for those who did give a rating.

When expressed as a mean score, the MCard app rated highest amongst older respondents.





Source: Q17. On a scale of 1-10, where 1 is very poor and 10 is excellent, how do you rate the MCard Mobile app
Source:Q17. On a scale of 1-10, where 1 is very poor and 10 is excellent, how do you rate the MCard Mobile app X Q27. Which of these age categories do you belong to?
Base: Q17 = all respondents(n=3,257) Base:Q17 and Q27 = all respondents(n= 3,231)



Source: Q18. Why have you not used the MCard Mobile app? (Tick all that apply)
Base:Q18 = respondents who have never use the app(n= 1,110)

Source: Q18i. Why have you not used the MCard Mobile app?... (Tick all that apply) If you use a different app, please specify:
Base:Q18i = respondents who use a different app (n= 360)

Reason for Not Using MCard App

There was a high percentage of respondents in question 17 who said they never used the app , therefore question 18 follows up to know why these respondents have never used the MCard App.

The main reason stated by these respondents was a preference to pay for travel with cash /credit in person (30%, n=332).

Respondents who admitted to using a different app mentioned the Northern Train app, LNER app, First Bus app, Transdev app, Arriva app, TransPennine app and the Trainline app.

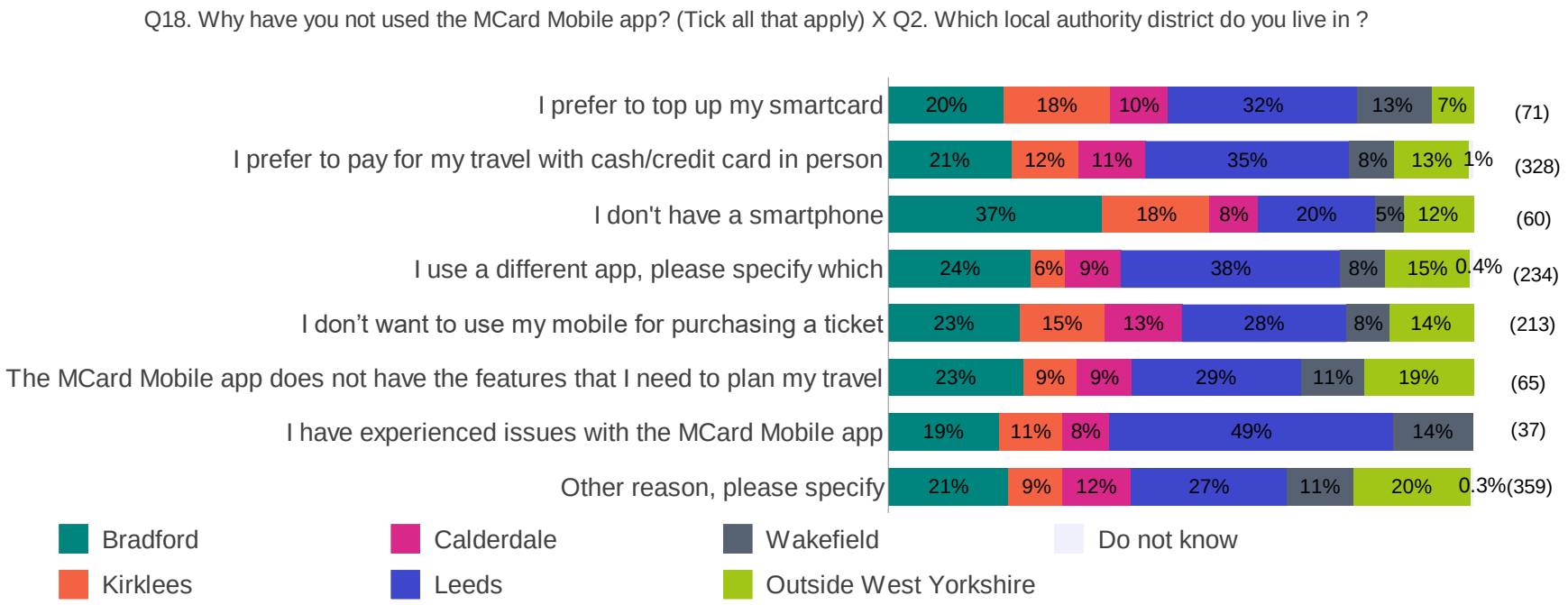
Other reasons (32%, n=360) for not using the MCard app were also cited, and these included; limited phone storage, not knowing about the app, concessionary pass use, living outside West Yorkshire, and some people felt they didn’t need the app.

Reason for Not Using MCard App by District

Respondents were asked why they have not used the Mcard app, and this was broken down by District.

The most popular reason that people didn't use the MCard app was "I prefer to pay for my travel with cash/credit card in person" and Leeds was the most represented district (35%, n=115) followed by Bradford (21%, n=69). People who used a different app were also popular and Leeds(38%, n=88) and Bradford(24%, n=57) residents were also the most represented districts who selected this reason.

There was a high proportion of respondents (37%, n=22) from Bradford who cited not having a smartphone as a reason for not using the app.

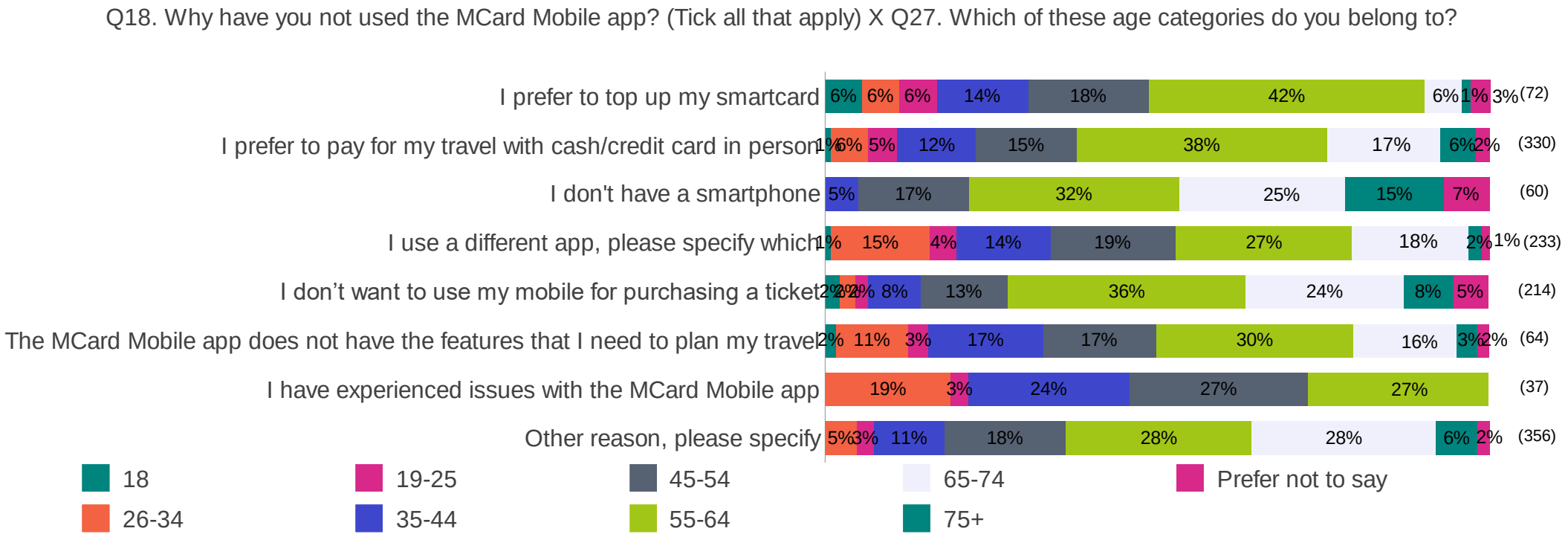


Source: Q18. Why have you not used the MCard Mobile app? (Tick all that apply) X Q2. Which local authority district do you live in ?
Base:Q18 and Q2 = respondents who have never use the app(n= 1,102)

Reason for Not Using MCard App by Age Categories

Respondents asked why they do not use the Mcard were grouped by age categories, as shown in the chart.

Respondents who prefer to pay for tickets by cash/credit card in person as their reason for not using the MCard app have respondents between 55-64(38%, n=125) are the largest represented age group. Respondents who stated they had issues with the MCard app had high representation from ages 35-44 (24%, n=9), 45-54 (27%, n=10), 55-64 (27%, n=10). The respondents who use a different app had 55–64-year-olds as the largest age group with 27% (n=62)

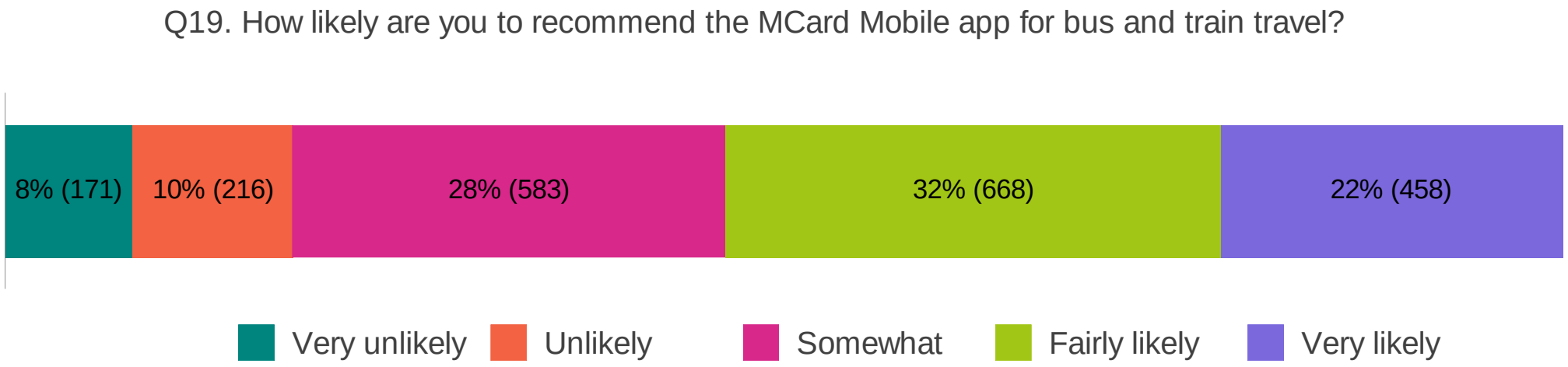


Source: Q15. How much do you currently pay for all of your local bus and train travel per month? (£) X Q27. Which of these age categories do you belong to?
Base:Q18 and Q27= respondents who have never use the app(n= 1,103)

FUTURE TICKETING CONSIDERATIONS

MCard App Improvements and Recommendations

Respondents stated that they are mostly likely to recommend the MCard app to other people than to not recommend. In total, 54% (n=1,126) of respondents said they were likely or fairly likely to recommend the app.



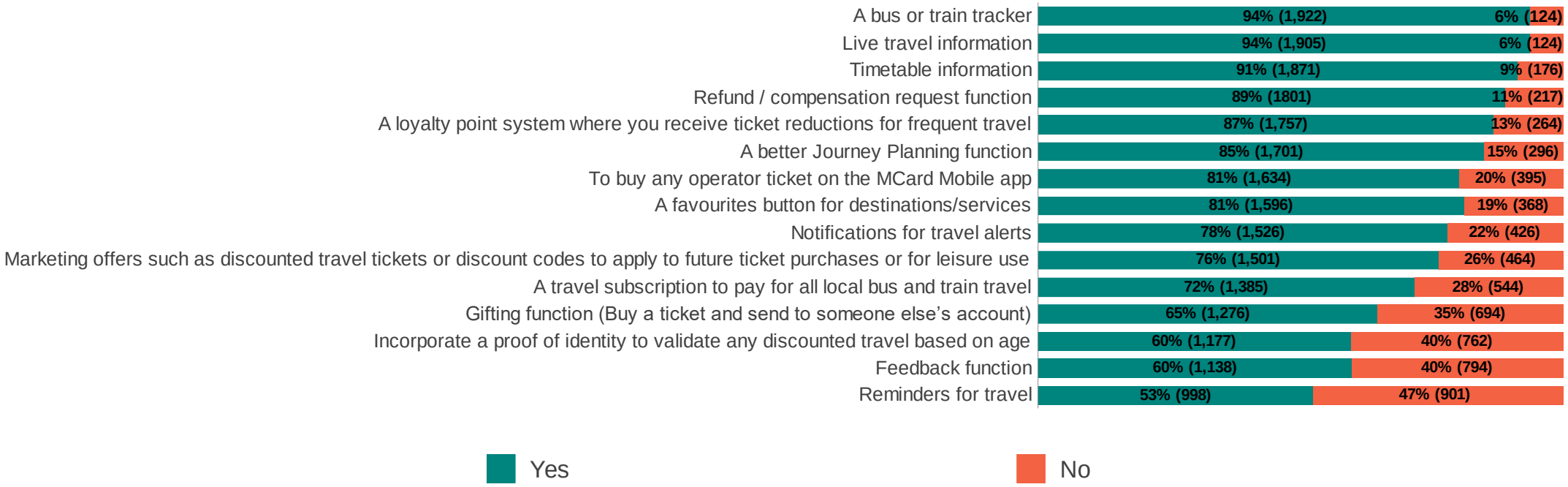
Source: Q19. How likely are you to recommend the MCard Mobile app for bus and train travel?
Base:Q19 = all respondents (n= 2,096)

MCard App Improvements and Recommendations

When respondents were asked what they would like to see, most of the suggestions were positive. The most popular suggestion was a bus and train tracker (94%, n=1,922). Respondents were able to select more than one option.

Other suggestions for improvements included, the option to add passes to digital wallets, faster ticket issuing, app discounts, less glitches, less clicks to buy tickets, loading tickets on MCard to app and being able to use both simultaneously, bus stop maps, loyalty points system, incorporation of concession passes, longer log out timeouts, QR codes which are easier to scan, easier ways to update personal details, offline tickets, card information saving on app and an easier refund claim process.

Q20. What improvements would you like to see on the MCard Mobile app?



Source: Q20. What improvements would you like to see on the MCard Mobile app?
Base:Q20 = all respondents (n= varies)

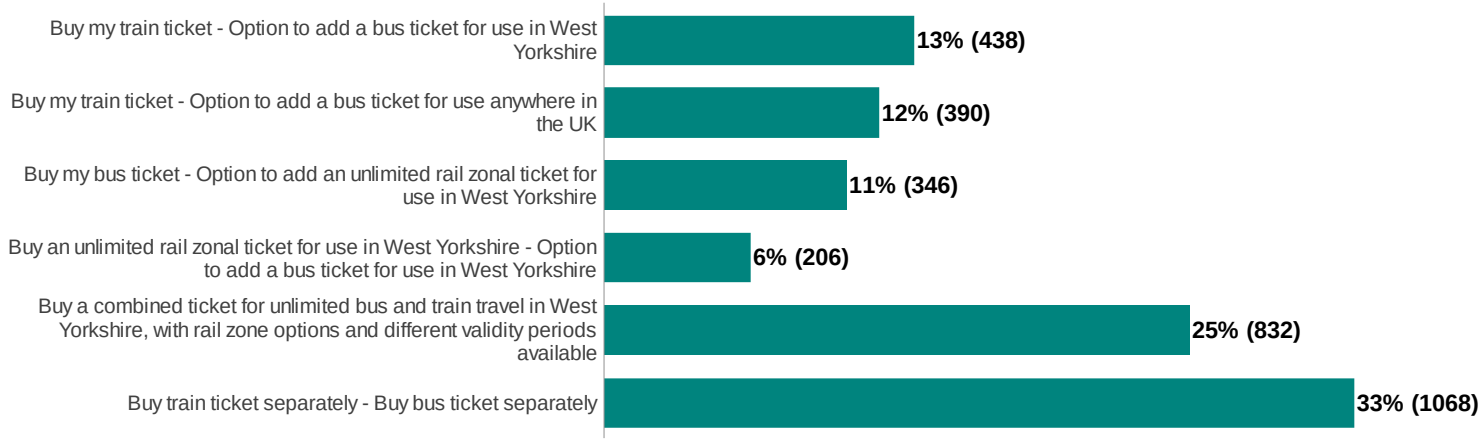
Future Bus and Train Ticket Offers

Respondents were asked to make a single choice among 6 options on which bus and train ticket offer they were likely to purchase in the future.

Buying train and bus tickets separately got the most votes , with 33% (n=1,068). This was closely followed by the ticket offers which would allow residents to buy a combined ticket for unlimited bus and train travel in West Yorkshire, with rail zone options and different validity periods (25%, n=832).

The ticket offer with the lowest votes was the offer that would allow an unlimited rail zonal ticket for use in West Yorkshire with an option to add a bus ticket for use in West Yorkshire (6%, n=206)

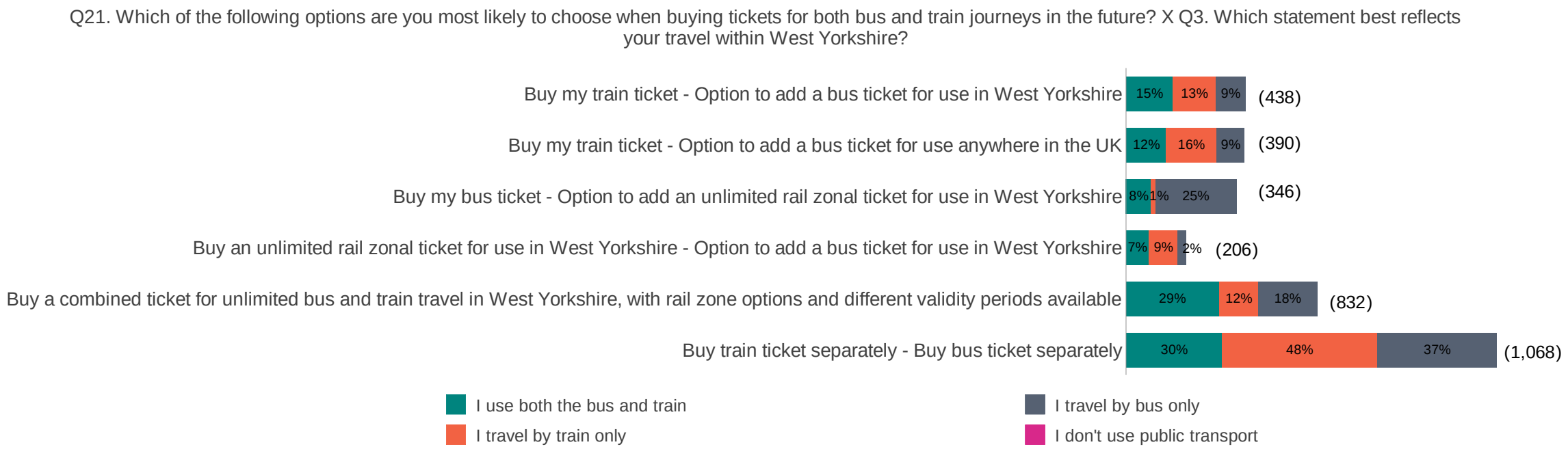
Q21. Which of the following options are you most likely to choose when buying tickets for both bus and train journeys in the future?



Source: Q21. Which of the following options are you most likely to choose when buying tickets for both bus and train journeys in the future?
Base:Q21 = all respondents(n= 3,280) ,

MCard Bus and Rail Survey

Future Bus and Train Ticket Offers



Source: Q21. Which of the following options are you most likely to choose when buying tickets for both bus and train journeys in the future? X Q3. Which statement best reflects your travel within West Yorkshire?
Base:Q21 = all respondents(n= 3,280) ,

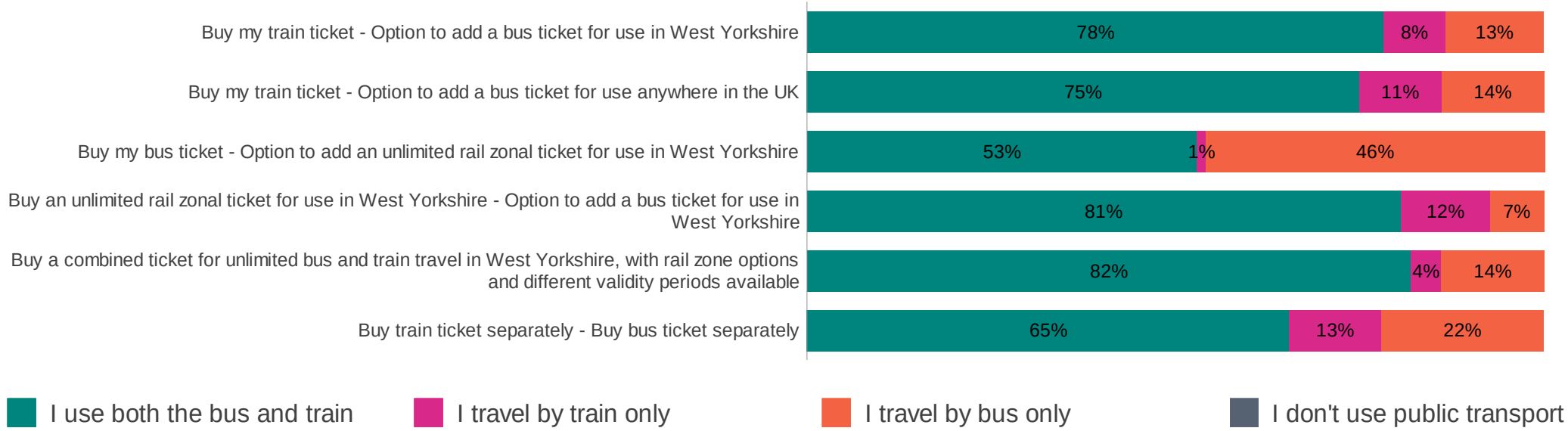
MCard Bus and Rail Survey

Future Bus and Train Ticket Offers by Mode

The preference of respondents for future bus and train ticket offers by mode of travel is shown in the chart below

Respondents who use both train and bus are well represented in each ticket offer compared to other modes, however there is a larger proportion of bus and train users (82%, 682) who voted for ticket offer; “Buy a combined ticket for unlimited bus and train travel in West Yorkshire, with rail zone options and different validity periods available”. The ticket offer, “Buy my bus ticket - Option to add an unlimited rail zonal ticket for use in West Yorkshire” was more popular among bus only users with 46% (n=159) than with train only users(1%, n=4) but slightly more preferred by bus and train users(53%, n=183).

Q3. Which statement best reflects your travel within West Yorkshire? X Q21. Which of the following options are you most likely to choose when buying tickets for both bus and train journeys in the future?

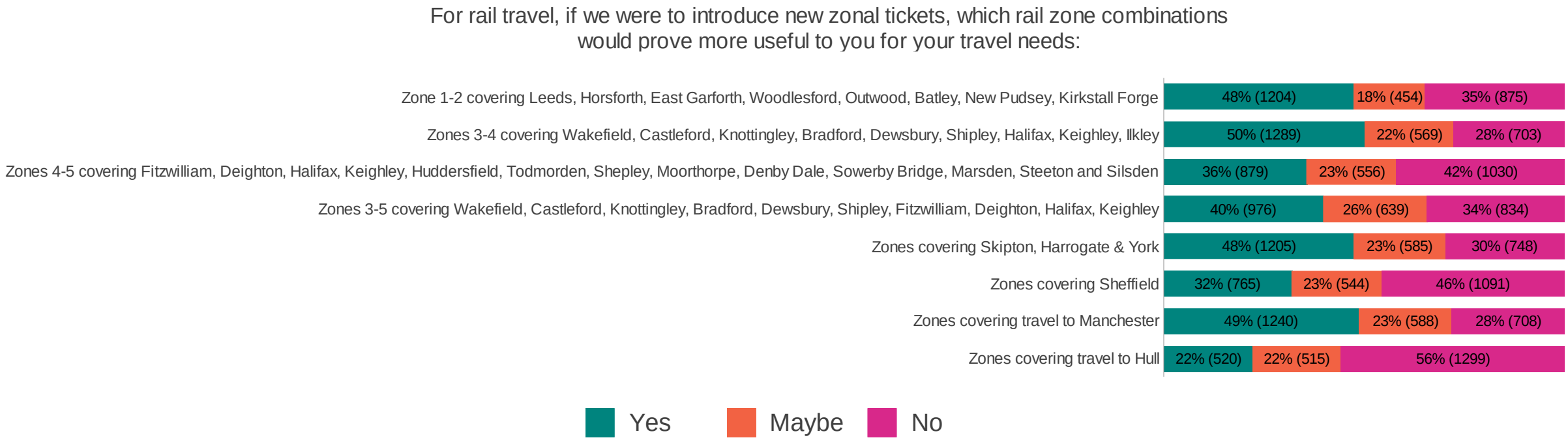


Source: Q3. Which statement best reflects your travel within West Yorkshire? X Q21. Which of the following options are you most likely to choose when buying tickets for both bus and train journeys in the future?
Base:Q3 and Q21 = all respondents(n= 3,280) ,

MCard Rail Zone Ticket offers

New zonal ticket proposals got mixed responses with zones covering travel to Manchester having the most positive response from respondents. 49% (n=1,240) said this zonal ticket would be useful to them while 23% (n=588) said maybe it would be useful.

Most of the new zone tickets offers were useful to more than 40% of respondents. New zone ticket offers covering Zone 4-5, Zones covering Sheffield had favourability of only around 36% and 32% respectively. Zones covering Hull had the highest proportion of negative responses from people not interested in that ticket offer.



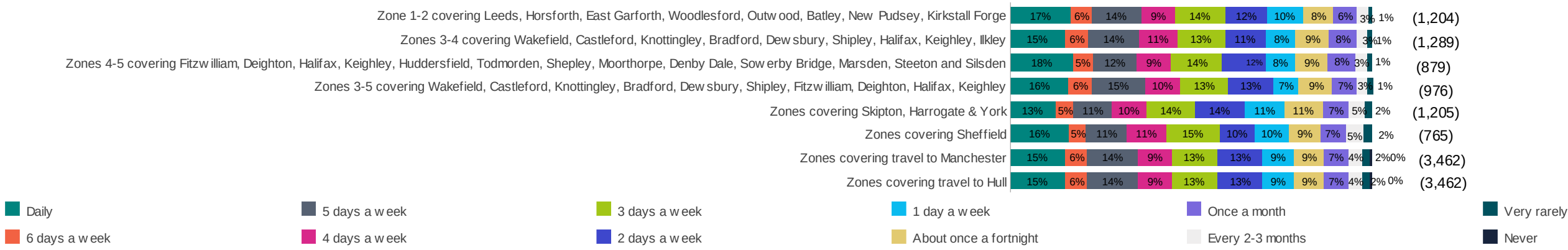
Source: Q22. For rail travel, if we were to introduce new zonal tickets, which rail zone combinations would prove more useful to you for your travel needs:
Base: Q22 = all respondents(n= varies) ,

MCard Rail Zone Ticket offers by Travel Frequency

Responses to zonal tickets proposals were analysed according to the frequency of travel of respondents.

Most of the new zone tickets offers were useful to more daily travellers than other travel frequencies. New zone ticket offers covering Zone 4-5, had the highest favourability (18%) among daily travellers. Respondents who travel 5 days a week also said yes to these zone offers more than other travel frequencies. The zone offer covering Zone 3-5 had the highest favourability of (15%) among respondents who admitted to travelling 5 days a week.

Q22. For rail travel, if we were to introduce new zonal tickets, which rail zone combinations would prove more useful to you for your travel needs? X Q8. How often do you travel on train and/or bus in West Yorkshire?



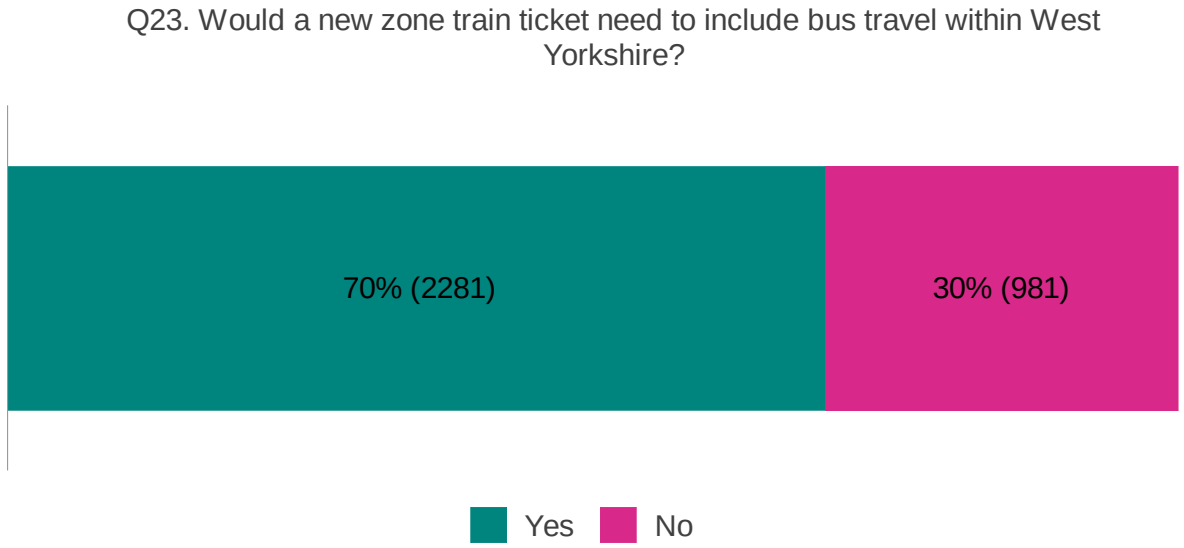
Source: Q22. For rail travel, if we were to introduce new zonal tickets, which rail zone combinations would prove more useful to you for your travel needs? X Q8. How often do you travel on train and/or bus in West Yorkshire?:
Base: Q22 and Q8 = all respondents(n= varies) ,

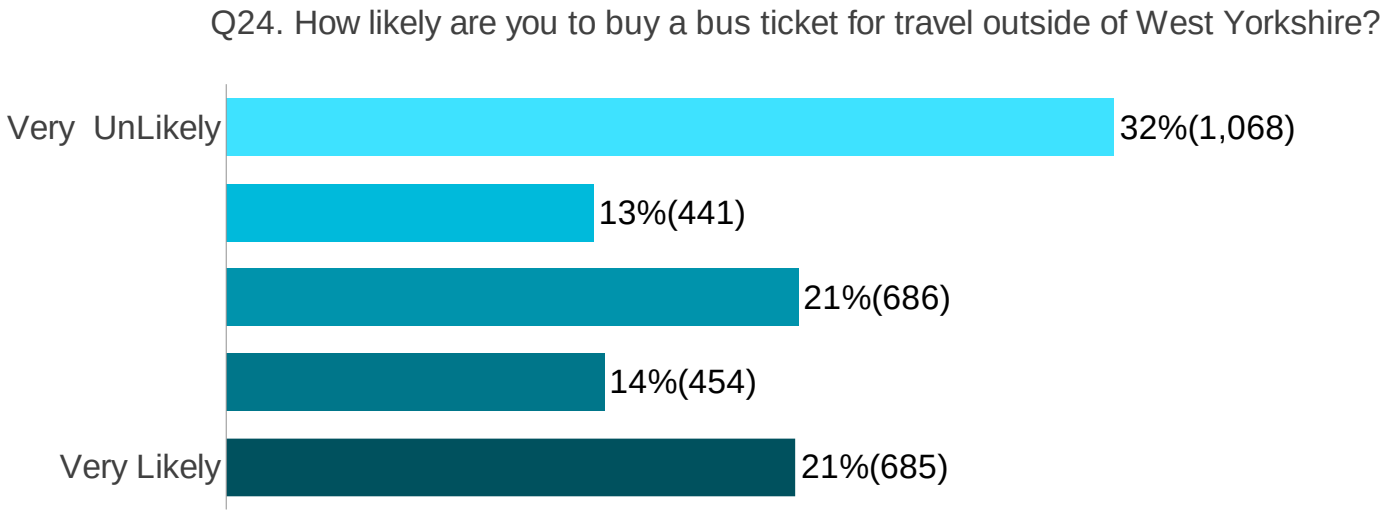
New Zone Tickets and Bus Tickets Outside West Yorkshire

70% (n=2,281) of respondents stated they agreed a new zone train ticket needed to include bus travel within West Yorkshire. This shows this new zone ticket will be popular among West Yorkshire residents.

Respondents were asked how likely they were to buy a bus ticket for travel outside of West Yorkshire and a higher percentage voted that this was unlikely. 45% (n=1,509) leaned towards unlikely while 35% (1,139) leaned towards likely, which shows there is significant interest but 10% less than people who were uninterested. 1 in 5 were neutral(21% , n=686) which means they were neither likely or unlikely, probably due to them not being bus users or not being bus users who live outside of West Yorkshire.

Source: Q23. Would a new zone train ticket need to include bus travel
West Yorkshire?, Q24. How likely are you to buy a bus ticket for trave
outside of West
Yorkshire?
Base Q23. = all respondents(n= 3,262) , Q24. = all respondents(n= 3,334)





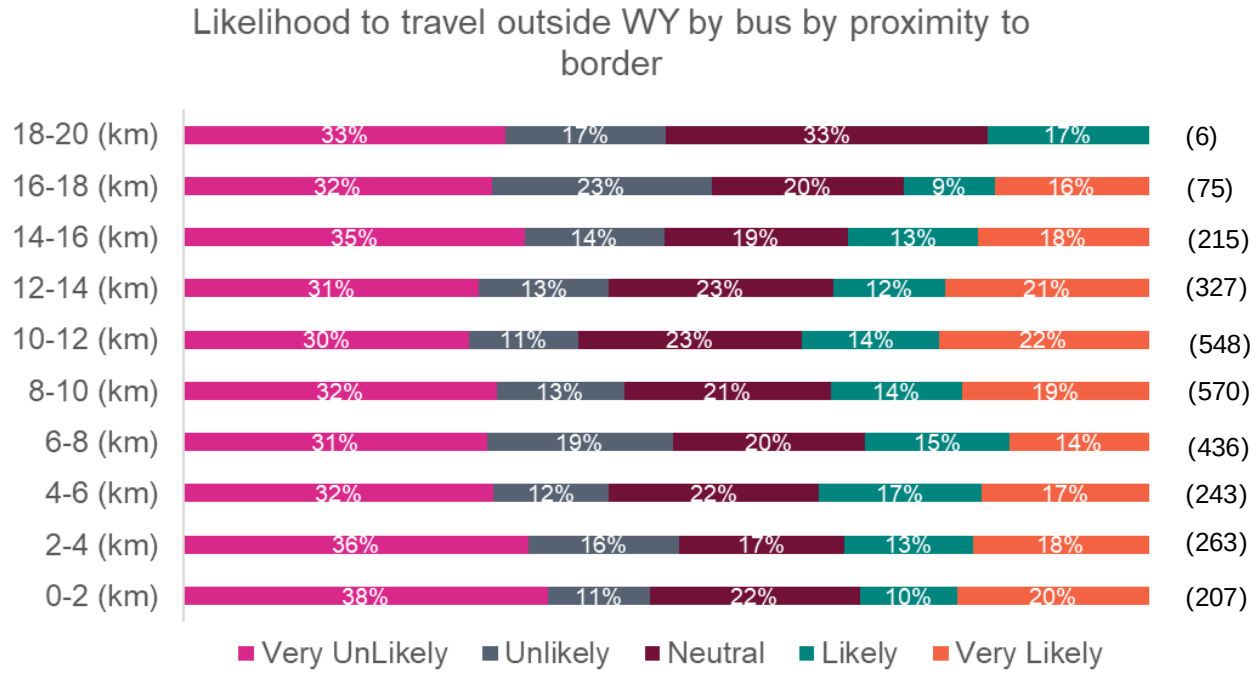
Bus Travel Outside West Yorkshire

In question 23, respondents were asked how likely they were to buy a bus ticket for travel outside West Yorkshire (WY). The chart below illustrates how likely someone was based on how far they lived from the WY border.

Respondents asked how likely they were to buy a bus ticket for travel outside of West Yorkshire according to distance from WY border shows no correlation between the distance from the border and the likelihood to buy a bus ticket to travel outside WY.

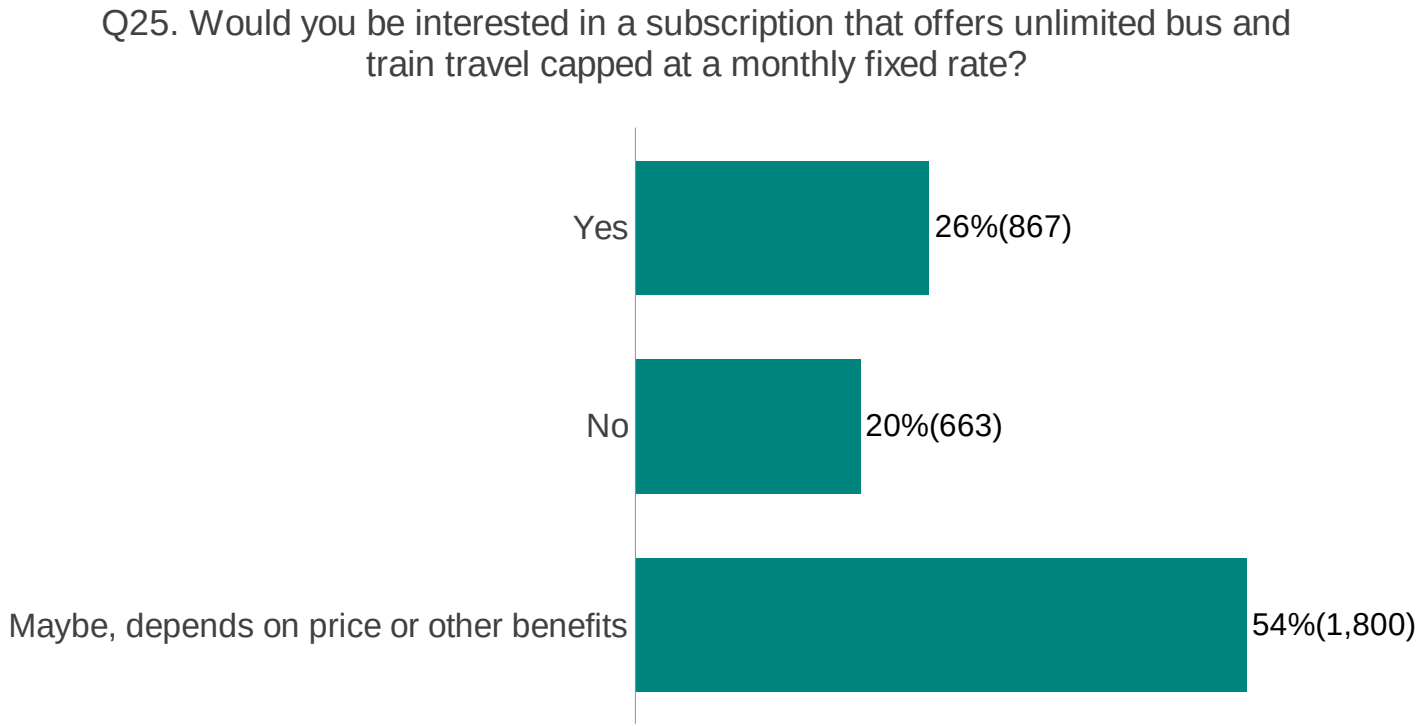
Respondents who lived between 16-18 km from the border had the highest percentage (55%) of unlikelihood to travel outside WY by bus (Very Unlikely=32%, n=24 and Unlikely=23%, n=17)

Percentage likelihood to buy a bus ticket for travel outside WY is highest for respondents who live between 10-12 km from the WY border with 36% likely to (Very Likely=22%, n=119, Likely=14%, n=78)



Source: Q1. What is your postcode?, Q24. How likely are you to buy a bus ticket for travel going outside of West Yorkshire?
Base Q1. & Q24. = all respondents(n= 2,890)

Additional offers and Potential Benefits



Respondents were asked whether they would like a subscription that offers unlimited bus and train tickets capped at a monthly fixed rate and the majority (54%, n=1,800)) of respondents said maybe they would be interested in that offer, but it will be dependent on the price or other benefits.

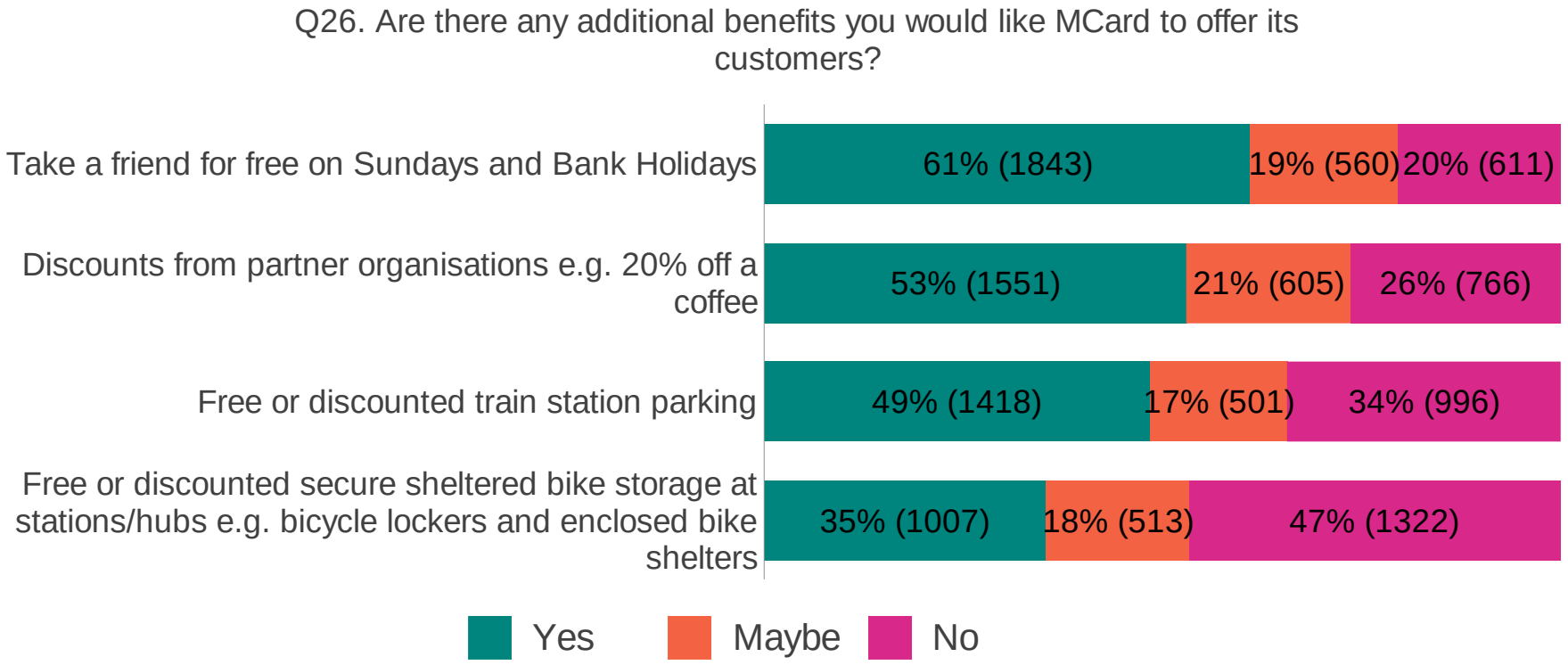
20% (n=663) said ‘No’ and but 26% (n=867) said ‘Yes’ they would welcome the offer.

Source: Q25. Would you be interested in a subscription that offers unlimited bus and train travel capped at a monthly fixed rate
Base Q25. = all respondents(n= 3,330)

Additional offers and Potential Benefits

Additional benefits that had the most positive response from respondents were ‘Take a friend for free on Sundays and Bank Holidays’ and ‘Discounts from partner organisations e.g. 20% off a coffee’ with 61% (n=1843) and 53% (n=1551) respectively.

The additional benefit of ‘Free or discounted secure sheltered bike storage at stations or hubs’ had the highest proportion of negative reactions to positive with up to 47% (n=1,322) respondents saying ‘No’.



Source: Q26. Are there any additional benefits you would like MCard to offer its customers?
Base Q26. = all respondents(n= varies)

Appendices

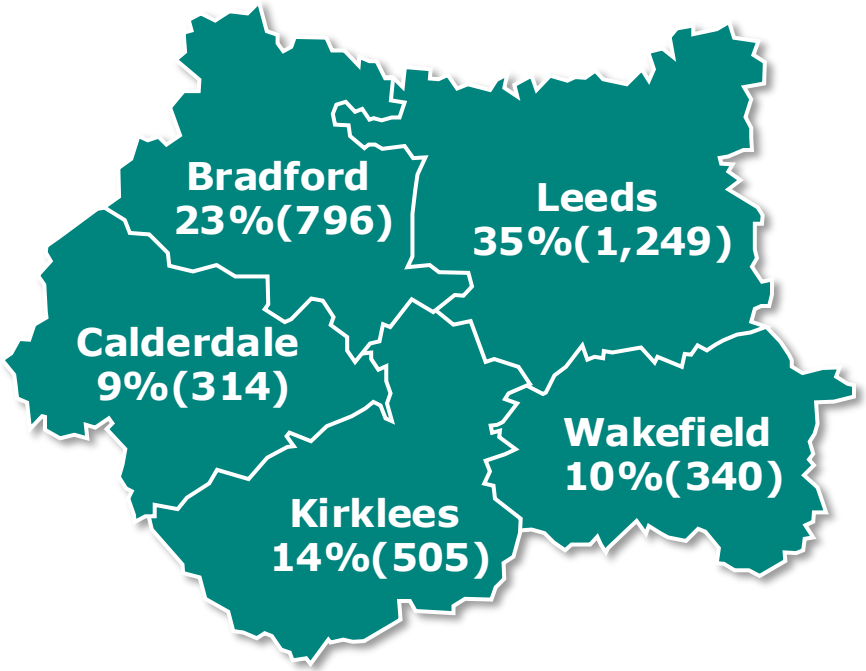
Where Respondents Live

The distribution of respondents is broadly representative of the population distribution in West Yorkshire.

There was also 9% (n=3,120) representation from respondents outside West Yorkshire.

This gives an idea of where respondent's journeys start and will help in designing rail zone ticket offers.

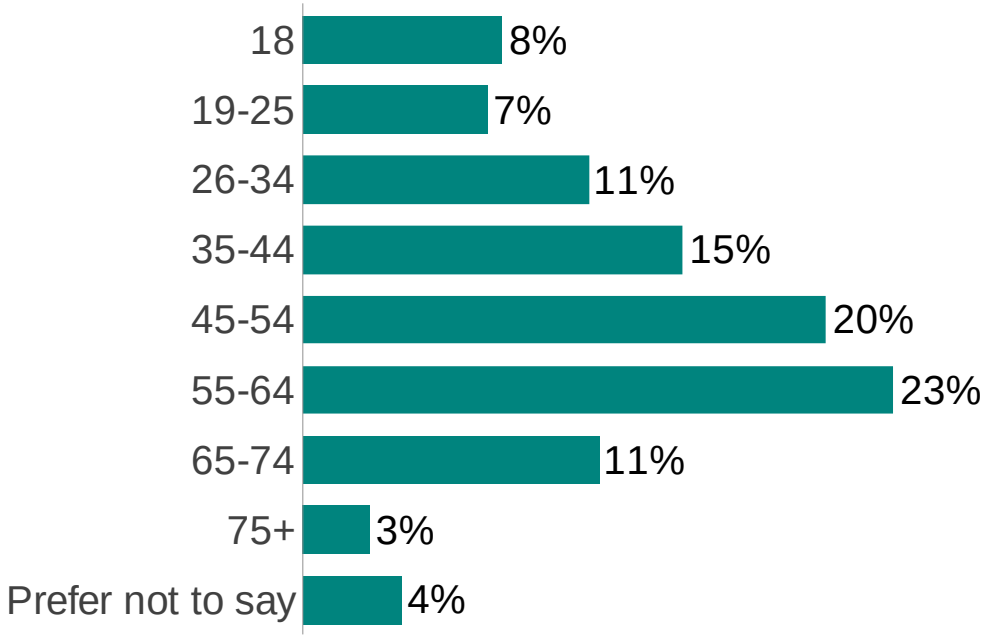
Q2. Which local authority district do you live in ?



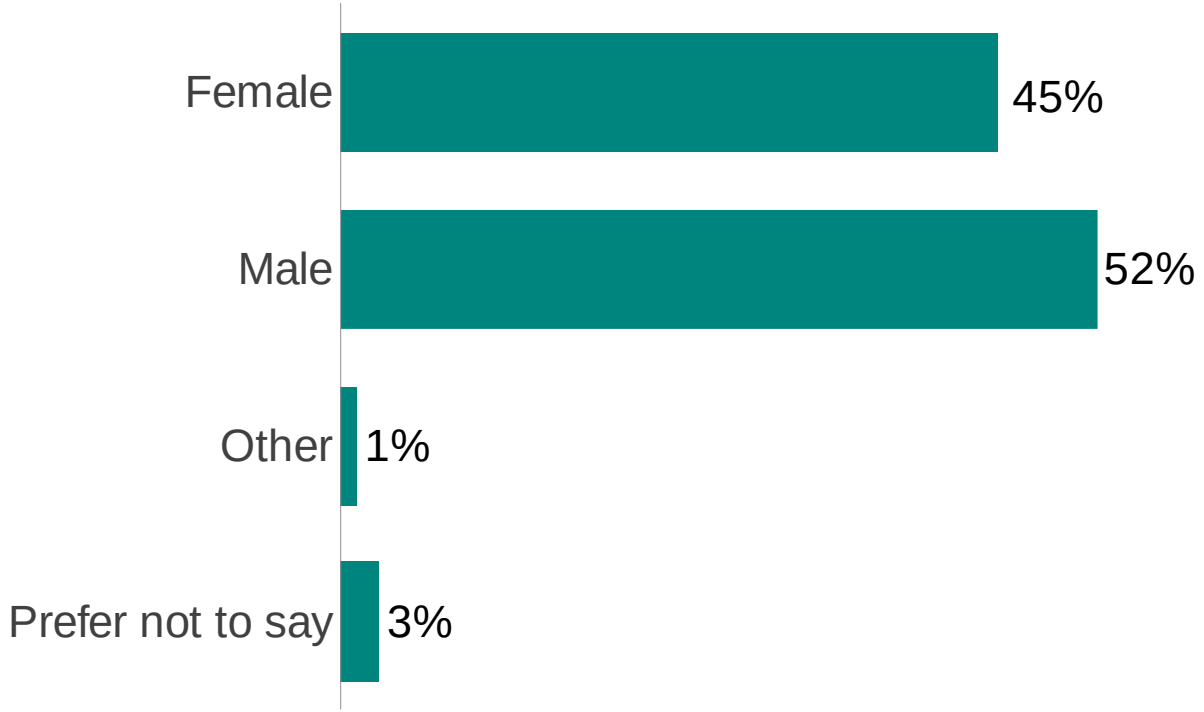
Outside WY
9%(312)

Demographics

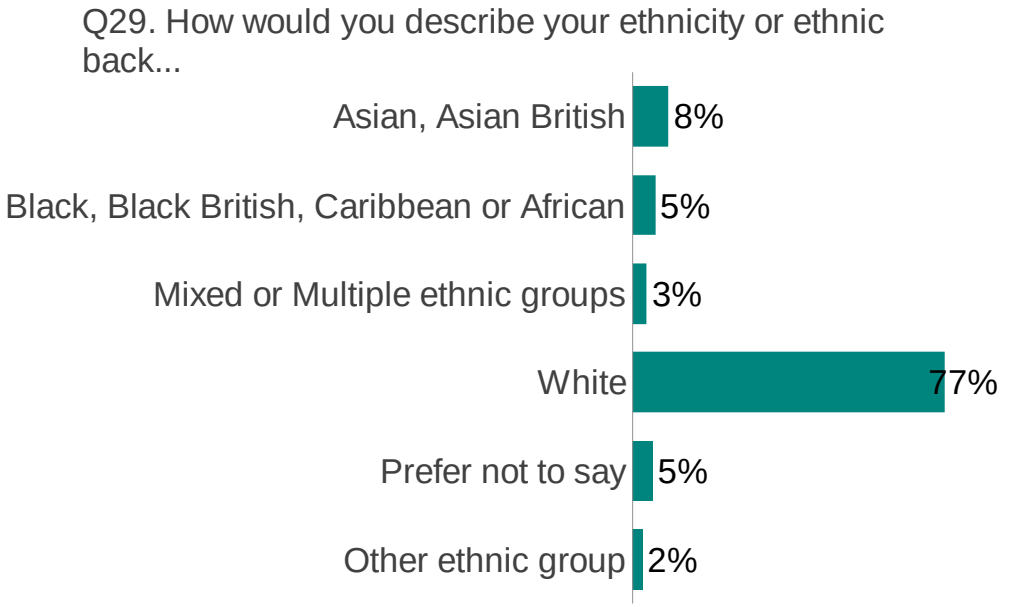
Q27. Which of these age categories do you belong to?

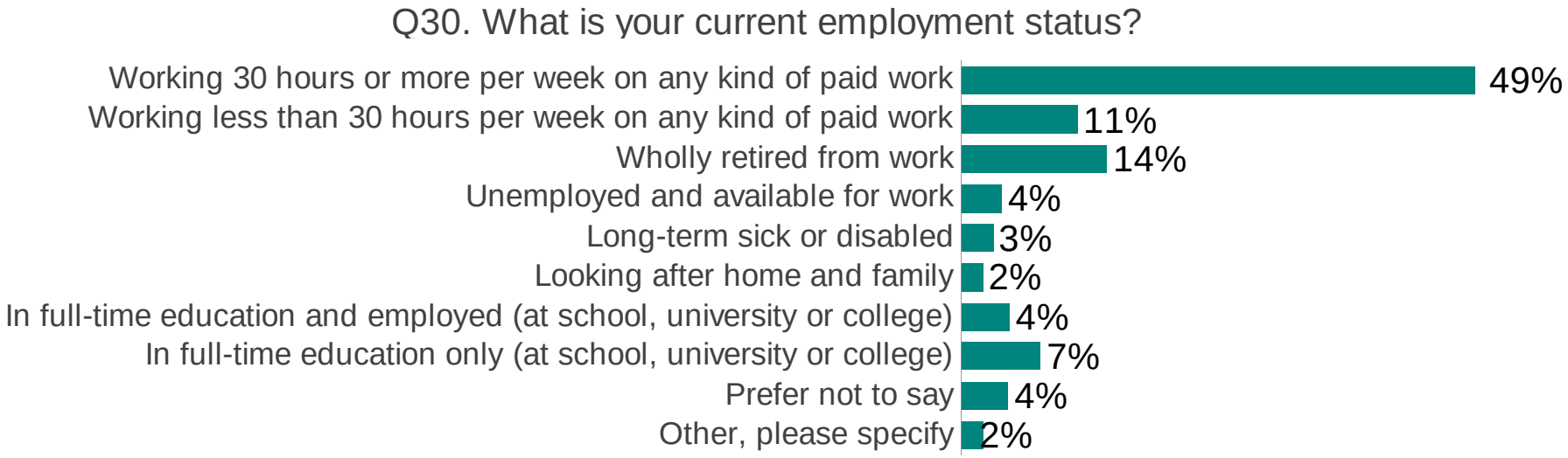


Q28. Do you identify as:

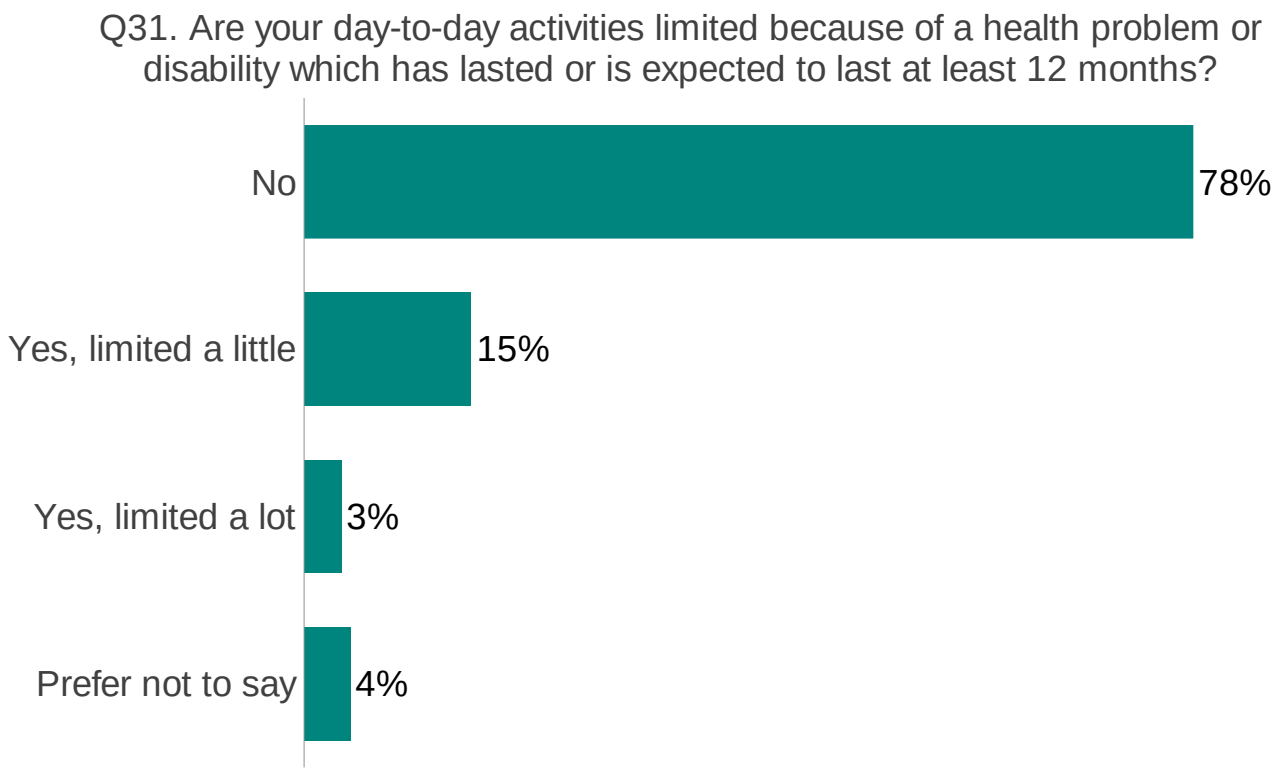


Demographics

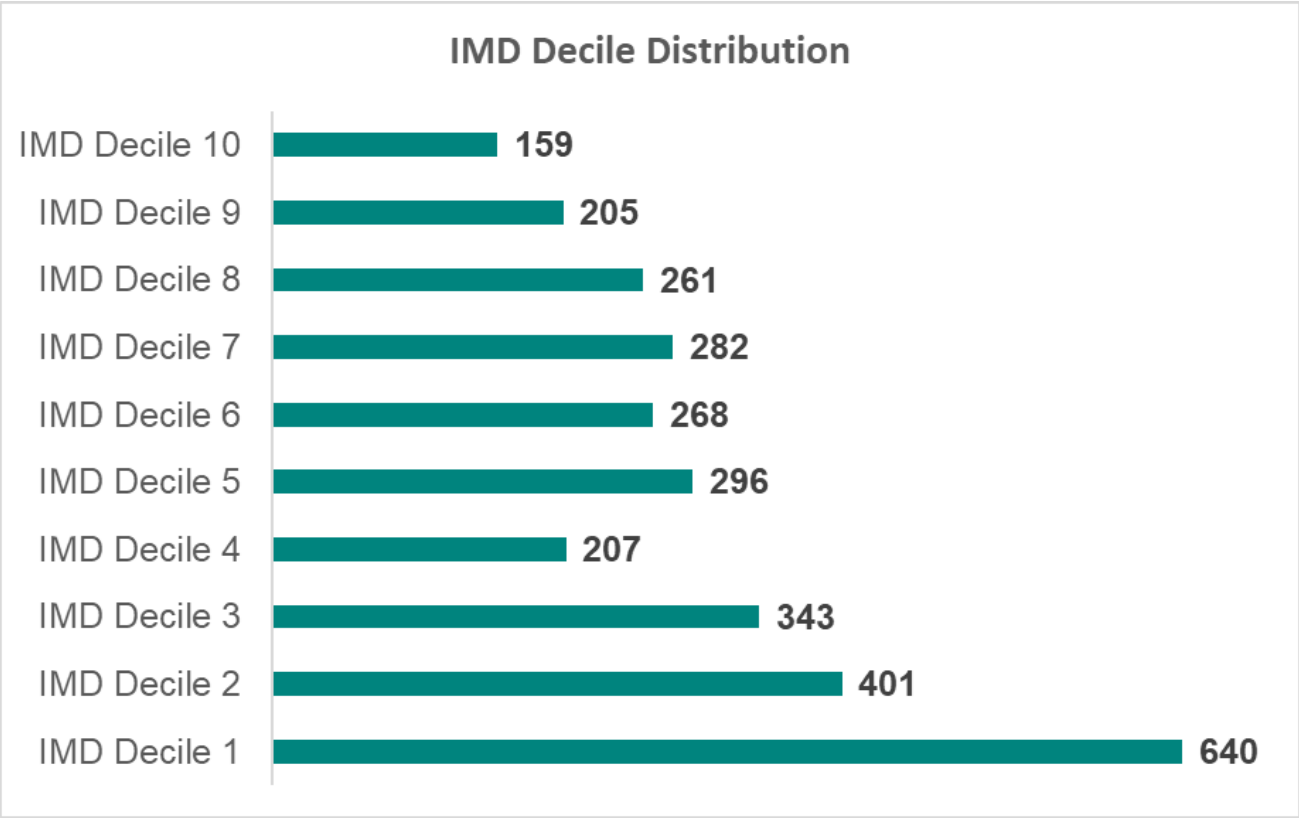




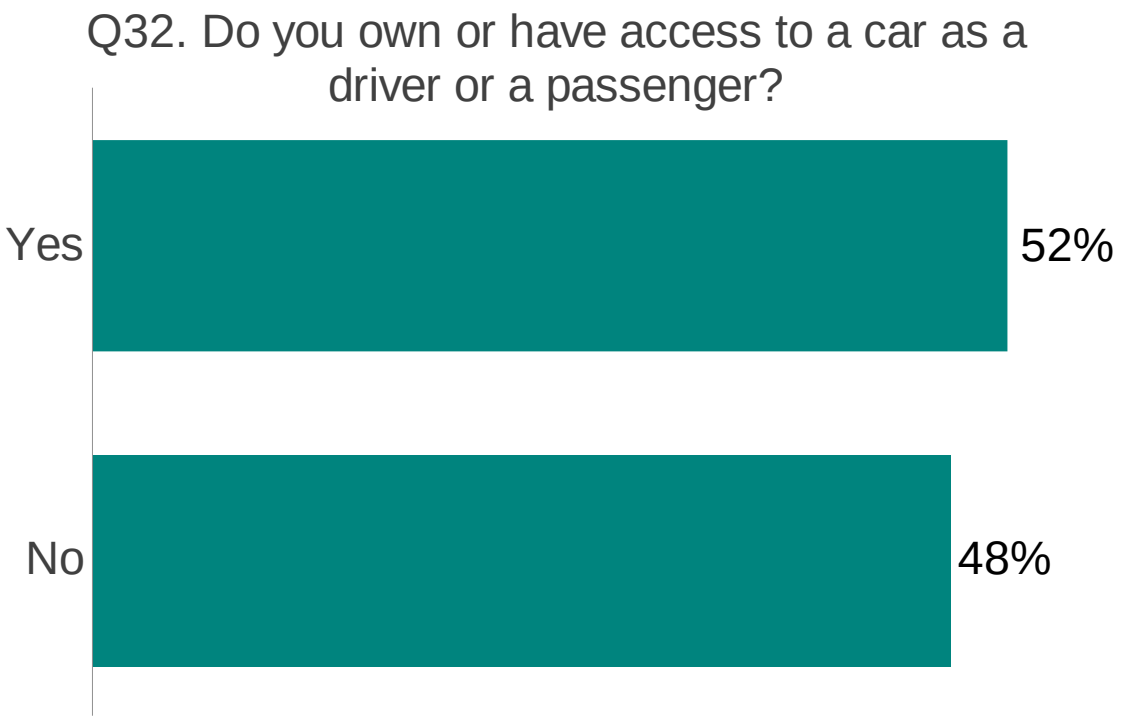
Demographics



Demographics

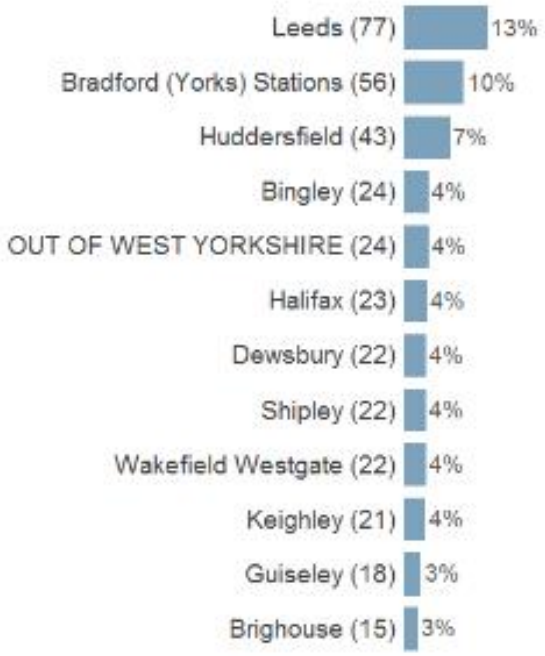


Car Access

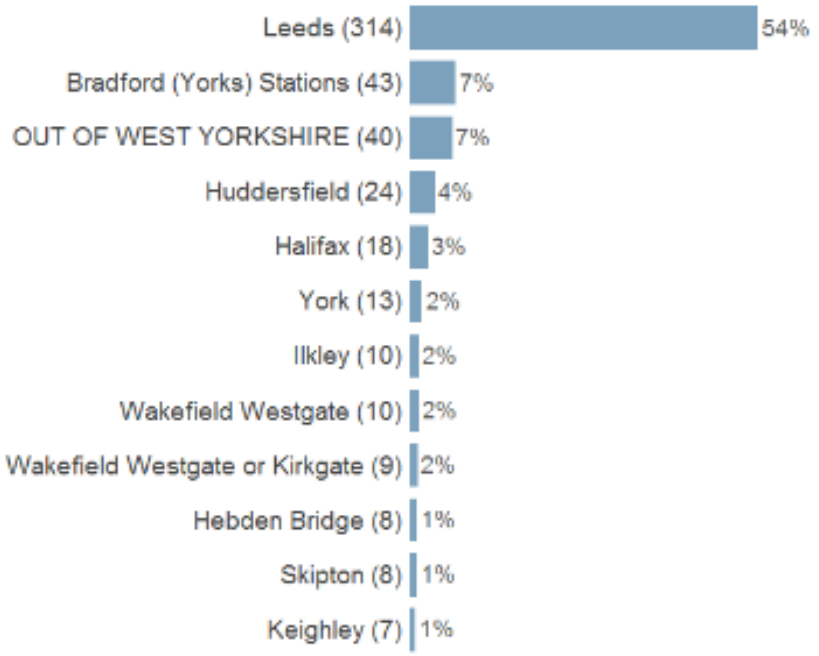

Q32. Do you own or have access to a car as a driver or a passenger?
Yes
52%
No
48%

Monday

Origin Stations

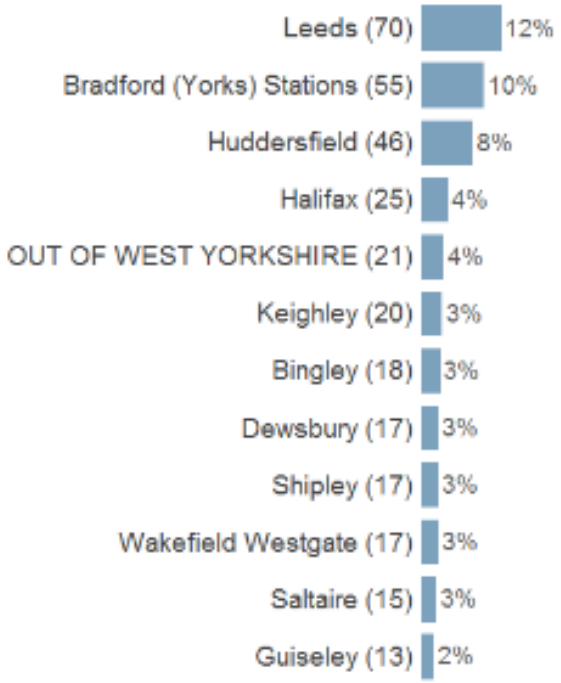


Destination Stations

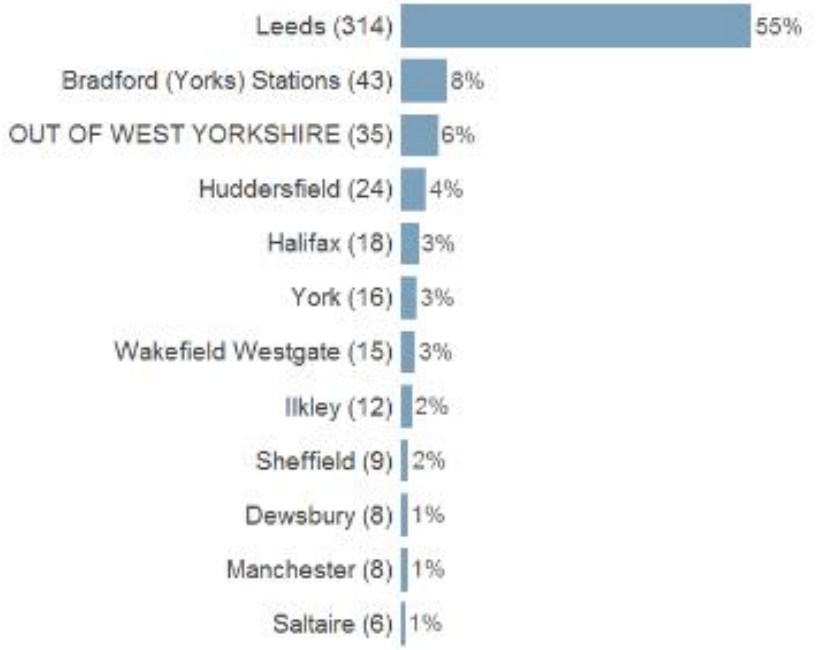


Tuesday

Origin Stations

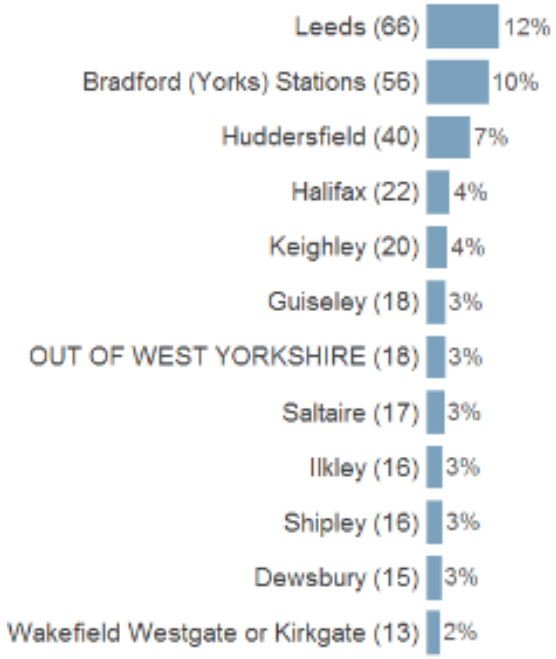


Destination Stations

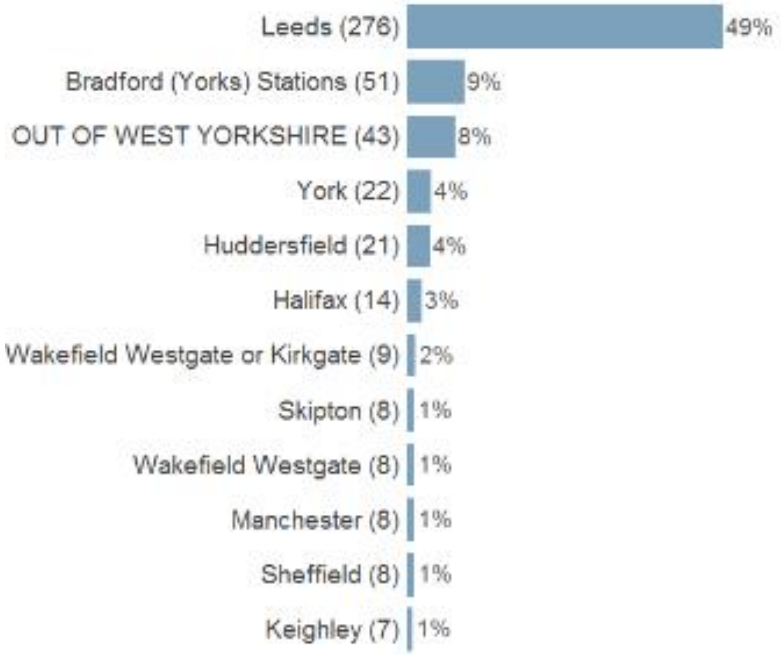


Wednesday

Origin Stations

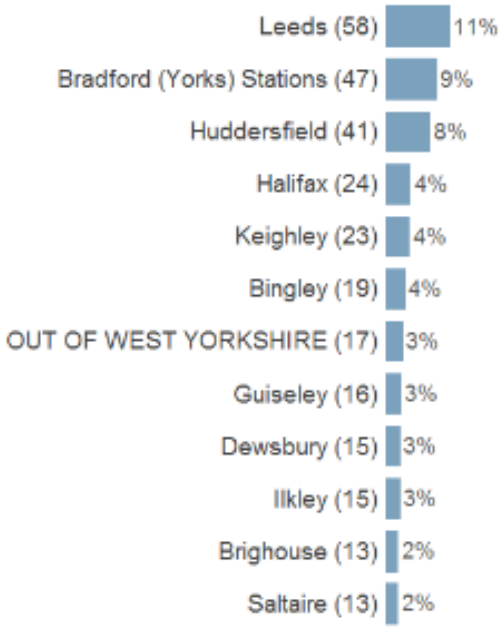


Destination Stations

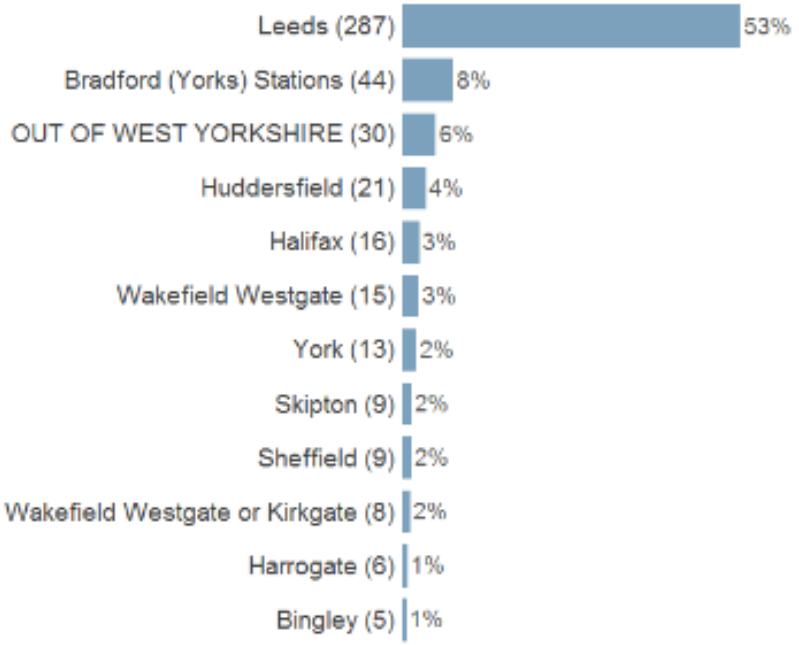


Thursday

Origin Stations

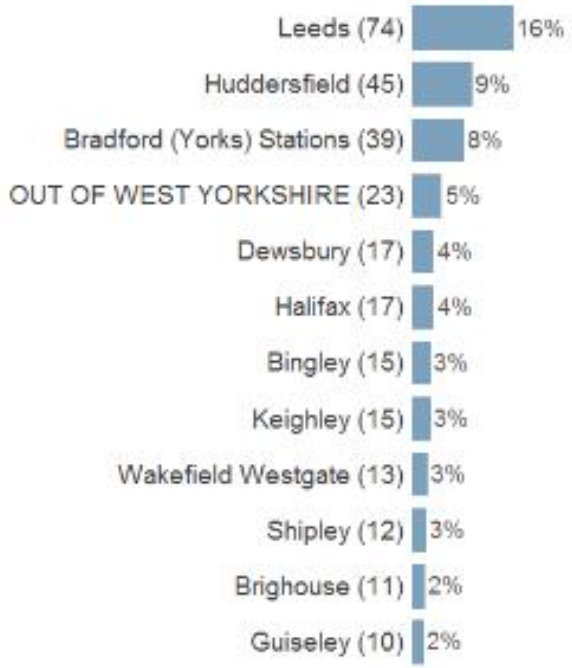


Destination Stations

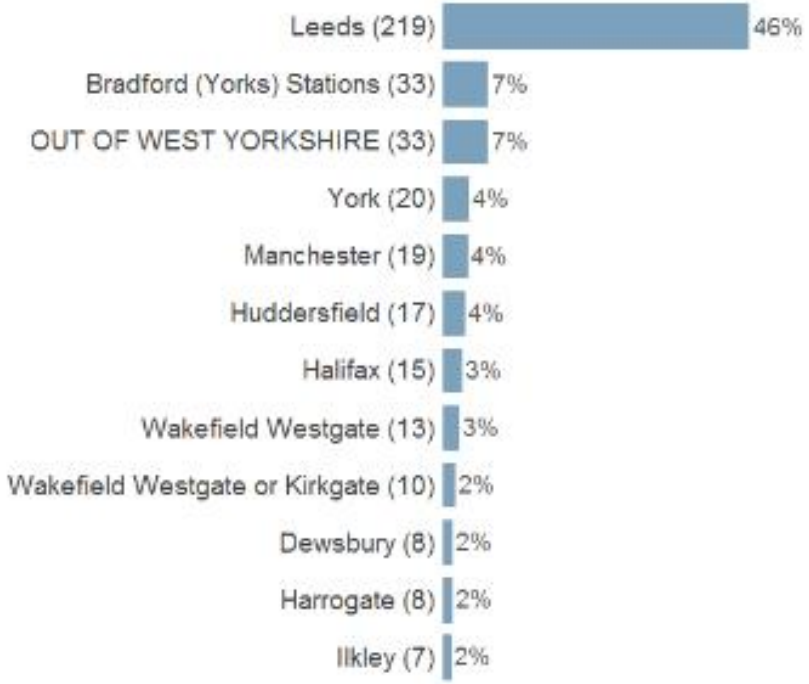


Friday

Origin Stations

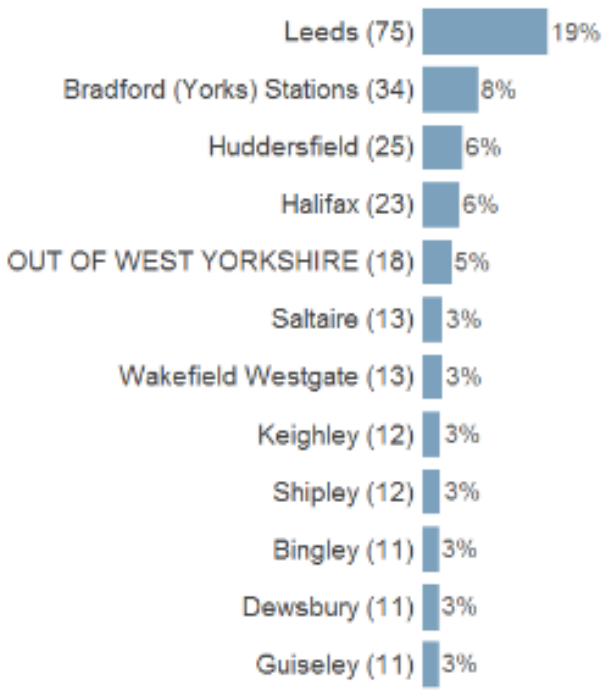


Destination Stations

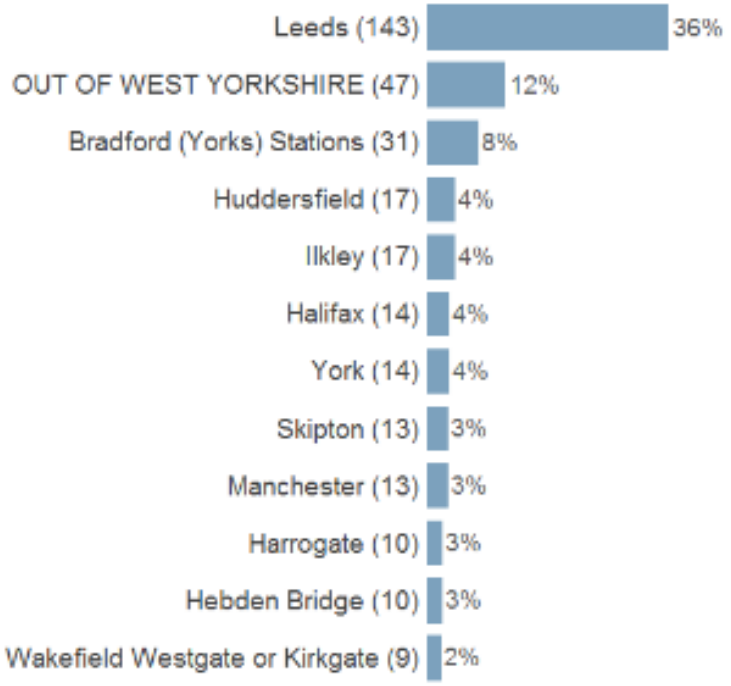


Saturday

Origin Stations

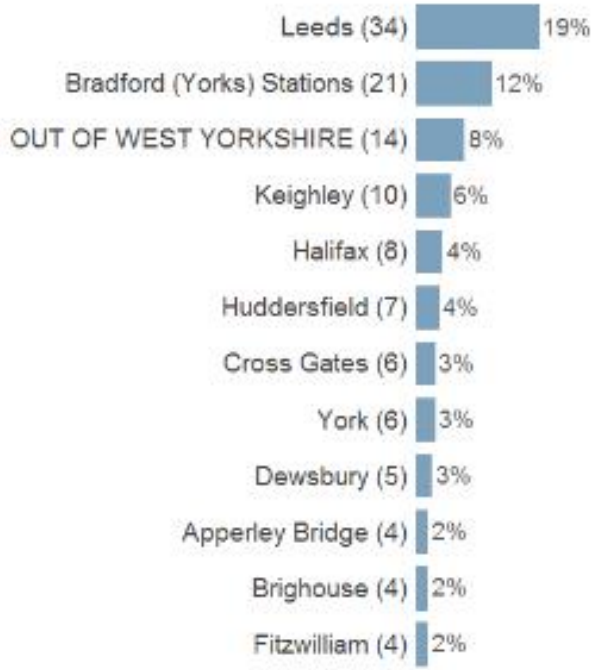


Destination Stations

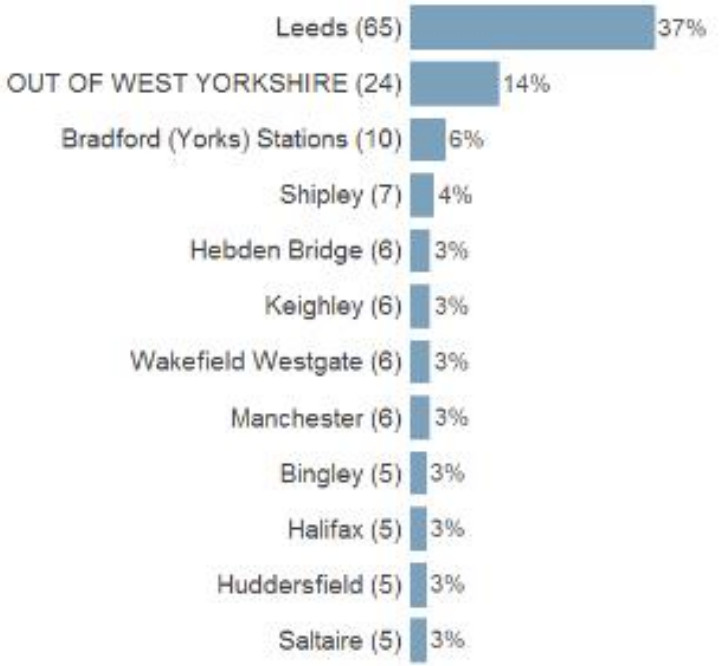


Sunday

Origin Stations



Destination Stations



Statistic	Description
Count	The number of data cases
Mean	This is often called the average. It is defined as the sum of the items divided by the number of items. For example, for ten responses Mean = (1 + 2 + 3 + 4 + 3 + 4 + 5 + 4 + 6 + 2) = 34 10 = 3.4
Mode	The mode of a distribution is the most frequent or most popular item. If two values tie for the mode, Snap chooses the lower. With the same ten responses: 1, 2, 2, 3, 3, 4, 4, 4, 5, 6 Mode = 4, since 4 is the most frequently occurring value (three occurrences).
Quartile 1	25% through a range of values
Median	The midpoint or 50% through a range of values. To calculate the median, the items of the distribution are arranged in order of magnitude starting with either the smallest or the largest, then: if the number of items is odd, the median is the value of the middle item. if the number of items is even, the median is the mean of the two middle items. 1, 2, 2, 3, 3, 4, 4, 4, 5, 6 Median = (3 + 4) ÷ 2 = 3.5
Quartile 3	75% through a range of values.

Statistic	Description
Sum	The sum is calculated by adding all the values of a distribution. Sum = 1 + 2 + 3 + 4 + 3 + 4 + 5 + 4 + 6 + 2 = 34
Minimum	The minimum is the smallest value of the distribution. Minimum = 1
Maximum	The maximum is the largest value of the distribution. Maximum = 6
Range	The range shows the spread of the distribution and is calculated by subtracting the smallest value (minimum) from the largest value (maximum). Range = 6 – 1 = 5
Standard Deviation	The standard deviation is a measure of dispersion of values in a distribution. It gives an indication of how much the values deviate from the mean. Thus, a distribution with a large range would have a larger standard deviation than one with a small range. The standard deviation is calculated as: where x_i is each value in the distribution, is the mean of the values and n is the number of cases. For the sample in question: Standard Deviation = 1.428286

Statistic	Description
Variance	The variance is another measure of dispersion of values in a distribution and is used in the calculation of the standard deviation: Snap calculates the standard deviation and variance by assuming the data represents a sample rather than an entire population.
Standard Error of the Mean	The standard error of the mean is calculated by dividing the standard deviation by the square root of the number of items in the sample. It is defined as the standard deviation of the distribution of the sample mean and gives an indication of how far individual scores deviate from the mean score shown. The larger the sample, and/or the closer the individual scores are to the mean score, the smaller the standard error. Standard Error of the Mean = 1.428286 ÷ √10 = 0.451664
Skewness	A distribution that is not symmetrical but has more cases toward one end of the distribution than the other is called skewed. The measures of central tendency (mean, mode and median) can vary considerably. If the mean is larger than the mid point of the range (the median) and the most frequently occurring value (the mode), the sample is said to be positively skewed. If the mean is smaller than the mid point of the range (the median) and the most frequently occurring value (the mode), the sample is said to be negatively skewed. A small skewness value (close to 0) indicates that the data is evenly distributed about the mean. With this type of distribution it would be expected that the values for mean, mode and median be similar. The skewness of the example is 0.098843 indicating a small positive skewness.

Statistic	Description
Kurtosis	Kurtosis also gives an indication of the shape of a distribution in the form of the extent to which, for a given standard deviation, the data clusters around a central point. A positive value for kurtosis indicates a distribution that is more peaked than usual. A distribution of this type would typically have most of the values clustered around a central point. A negative value for kurtosis indicates a flatter or more widely dispersed distribution. The kurtosis for the example is -0.75202
Average Absolute Deviation	The average of the absolute deviations. It is a and tends to ignore distant outliers. It is a summary statistic of statistical dispersion and would normally only be displayed if specifically requested
Sample Standard Deviation	An estimate of the population standard deviation based on the sample.

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

End

westyorks-ca.gov.uk