

NET Tramlink
Brand Tracker - 2024
Report. August 2024



Method and sample

A 10-minute online survey of 1200 participants from areas that have traditionally seen commuting into Nottingham city centre. This provides statistically reliable data.

The sample included: 800 current users and 400 non-tram users, and is representative in terms of gender, age and ethnicity.

The 1200 sample was split across the agreed postcode list.

Tram usage is high – it's the most used mode of public transport in Nottingham. However, passengers anticipate an increase in their use of the train over the remainder of the year.

Tram users tend to be young city workers or families. Students present an opportunity for their leisure and work travel – but to convince them, we need to improve VFM perceptions.

Passengers in Nottingham; 3 profiles



Young city workers

18 to 34-year-olds working in the city using tram for work (Core audience)



Families traveling for leisure

(Secondary, development audience)



Students

(Secondary, development audience)

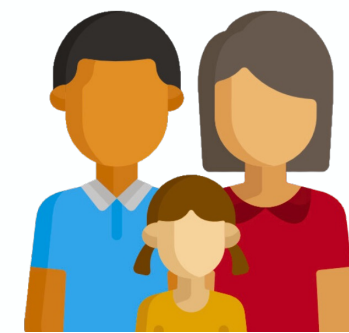
Passengers in Nottingham; 3 profiles



Young city workers

18-34 years old using tram for work

- ABC1
- Living with parents, single without children or married / living as married with children
- Significantly more likely to have used the trams in the last 6 months
- Significantly more likely to travel multiple times a week
- Day, single, weekly ticket holders
- Purchase via ticket machine, contactless or NETGO! app
- More likely to visit NET trams social media



Families

Using tram for leisure

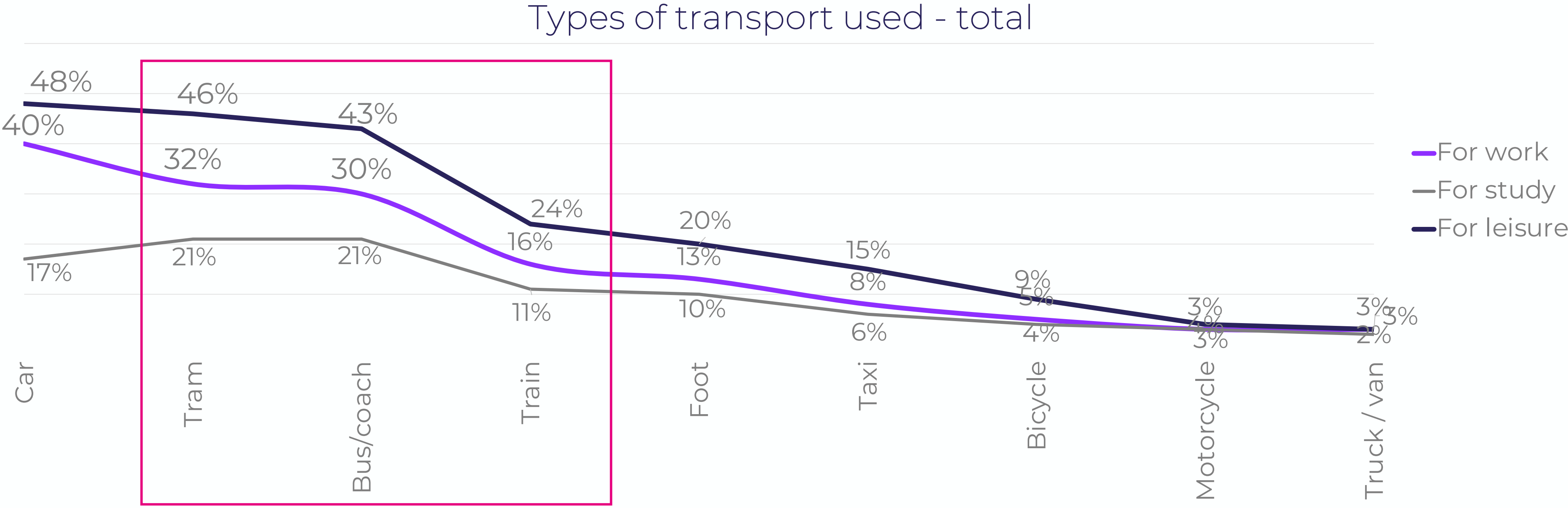
- ABC1
- Mainly aged 35 - 54
- Significantly more likely to travel monthly
- Day, single or group ticket purchasers
- Mainly purchase at machine
- Use the park and ride most



Students

- AB and C1C2
- Aged 18 – 34
- Most likely to use the tram for leisure (80%) or work (65%) purposes (compared to 56% for study).
- Significantly more likely to travel weekly
- Day or single tickets
- Equal mix of purchasing behaviour: NETGO! App, ticket machine, or contactless

The tram remains the favoured mode of public transport around Nottingham for all 3 purposes.

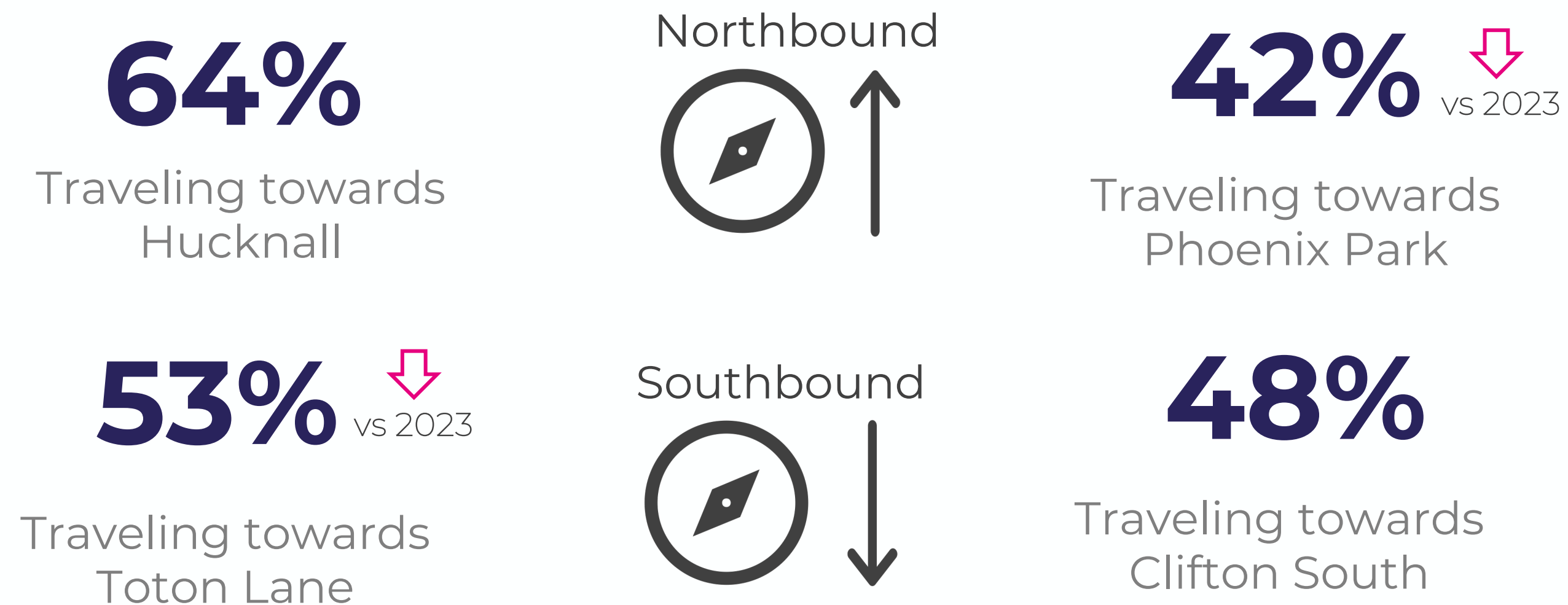


Q6 - How do you tend to travel into Nottingham when travelling for each of the following occasions?
Base: 1340



Claimed usage of Phoenix Park and Toton Lane routes has dropped.

Tramline usage – tram users



Day tickets are most used, but there's been an increase in single and weekly ticket purchasing.

Ticket purchasing – tram users

Day	Single	Group	Week	Season	Robin Hood	Concessionary	Short hop	
2023	57%	2023 25%	2023 6%	2023 8%	2023 9%	2023 14%	2023 5%	2023 -
2024	54%	2024 30% ↑	2024 8%	2024 13% ↑	2024 8%	2024 17%	2024 7%	2024 9%

How purchased



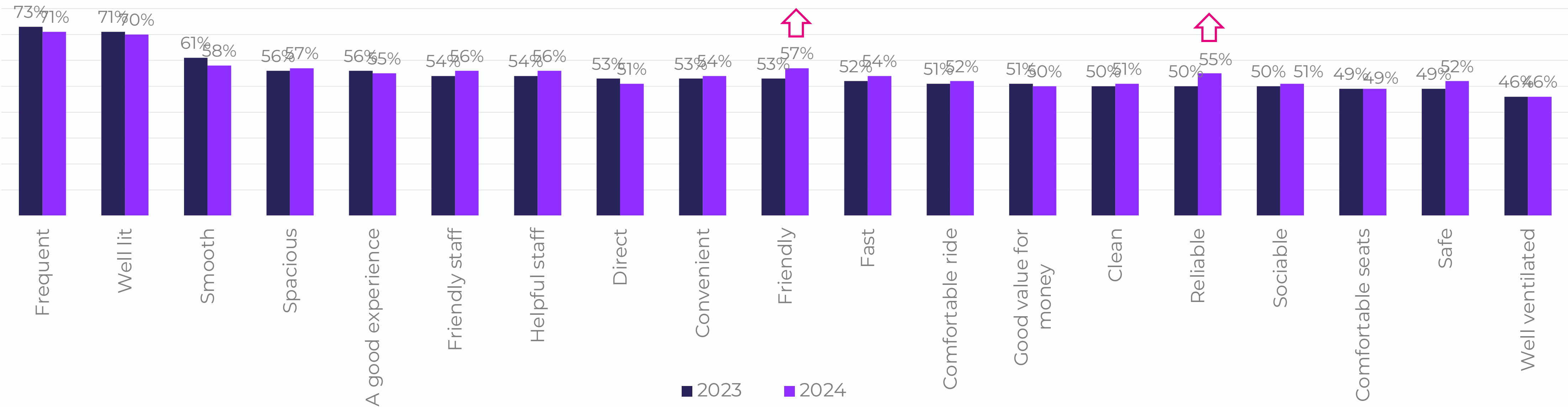
Q15 - Which type of ticket do you usually purchase?; Q16 - How do you purchase your ticket?
 Base: 2023 n=802, 2024 n=935

↑ = significantly higher
 ↓ = significantly lower



We've seen a rise in perceptions of the tram as friendly and reliable.

Review of tram - total



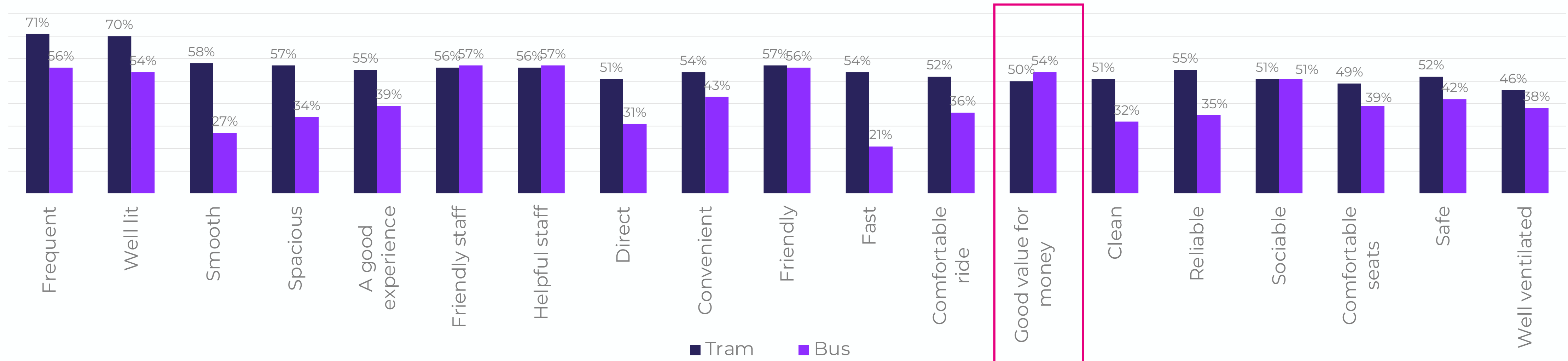
↑ = significantly higher
 ↓ = significantly lower



Q9 - We are now going to show you a range of words that have been used to describe different modes of transport. Please review each word and select which you associate with each mode of transport?
 Base: 2023 n=1202, 2024 n=1340

VFM is the only attribute where the tram loses out to the bus, mainly among under 25's.

Review of tram and bus - total



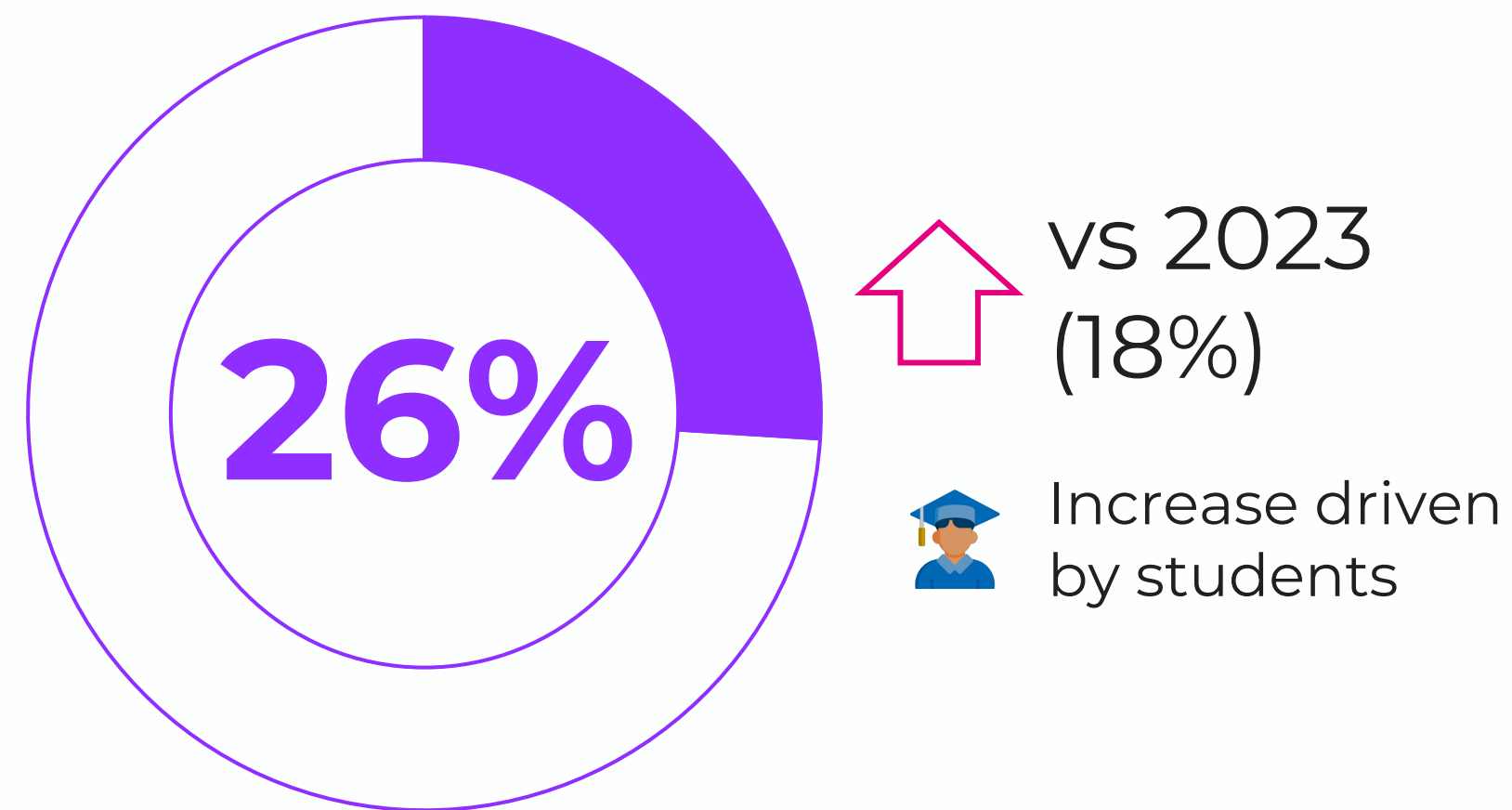
Under 25's (thus, our Young City Workers and Students) are more likely to see the bus as good value for money



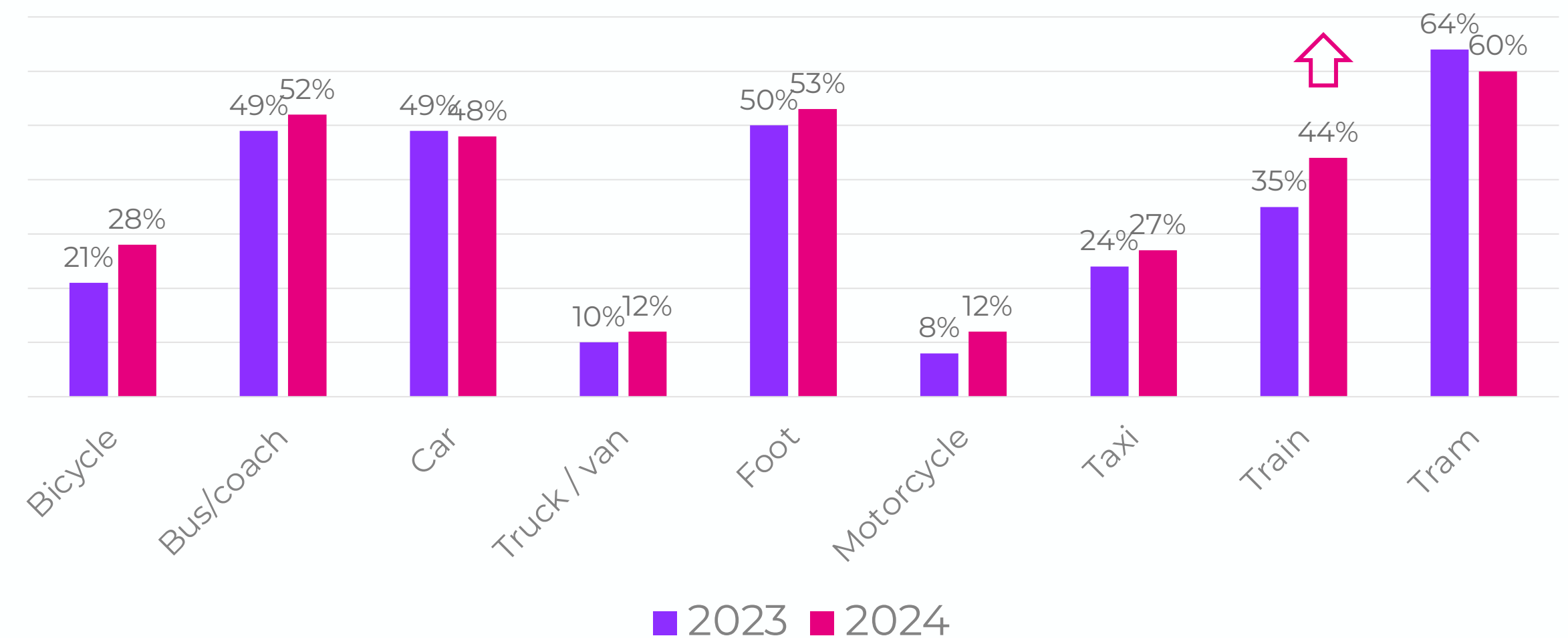
Q9 - We are now going to show you a range of words that have been used to describe different modes of transport. Please review each word and select which you associate with each mode of transport?
Base: 1340

Passengers are anticipating a change in their travel habits (driven by students), with more expecting to use the train. Could this be linked to cost of living?

Expect to change travel habits in next 3 months - total



Expecting to travel more by



↑ = significantly higher
 ↓ = significantly lower



Q7 - Do you expect your travel behaviour to change at all in the next three months, either how frequently you travel or which modes of transport you will use? Base: 2023 n= 1202, 2024 n=1340
 Q8 - How do you expect your travel behaviour to change? 2023 n = 217, 2024 n =350

All 3 profiles consistently report that better value, improved routes and late-night trams would encourage higher tram usage.

Encourage to use tram more



Better value tickets





More routes



Late night trams

These 3 factors are consistent across families, city workers and students.

 = significantly higher
 = significantly lower



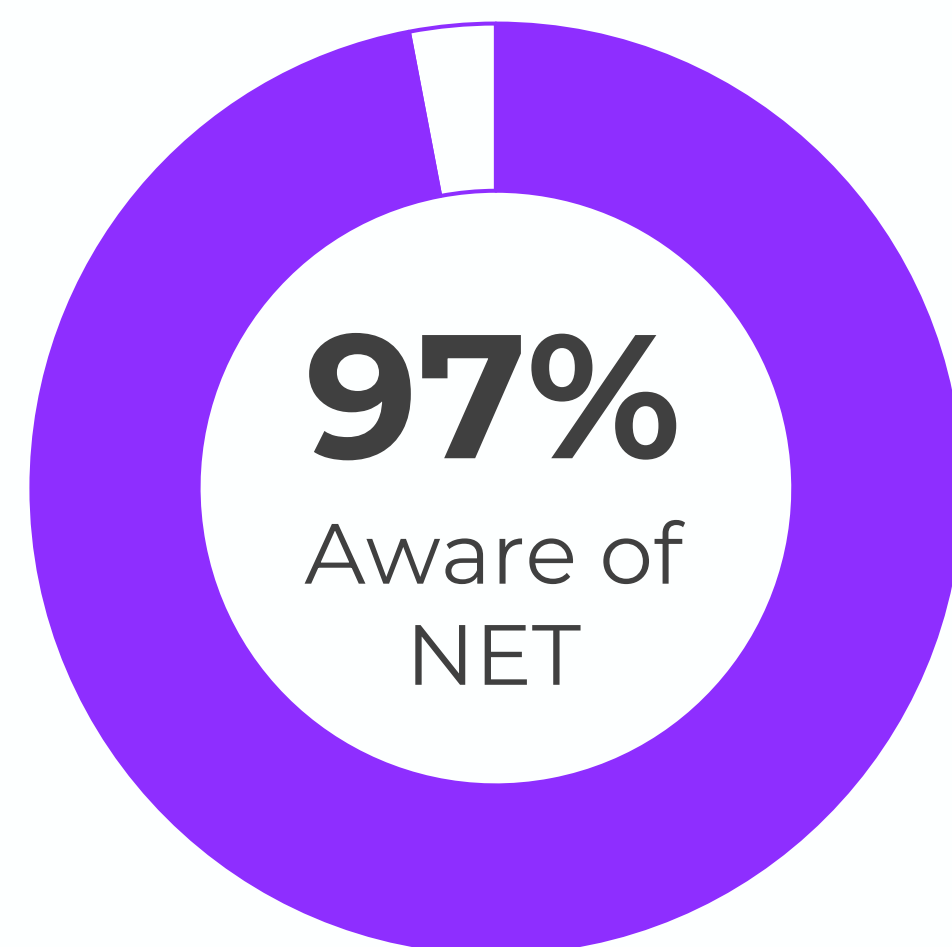
Q13 - What, if anything, would encourage you to use the tram more?
Base: 2023 n=802, 2024 n=935

NET's brand equity remains strong - awareness is very high and the brand is well regarded.

- **However, whilst perception of trust has improved, perception of providing local jobs has decreased - consider how to communicate the value NET brings to the local community.**

Awareness of NET remains very high among tram users and non-users.

Awareness of NET - total



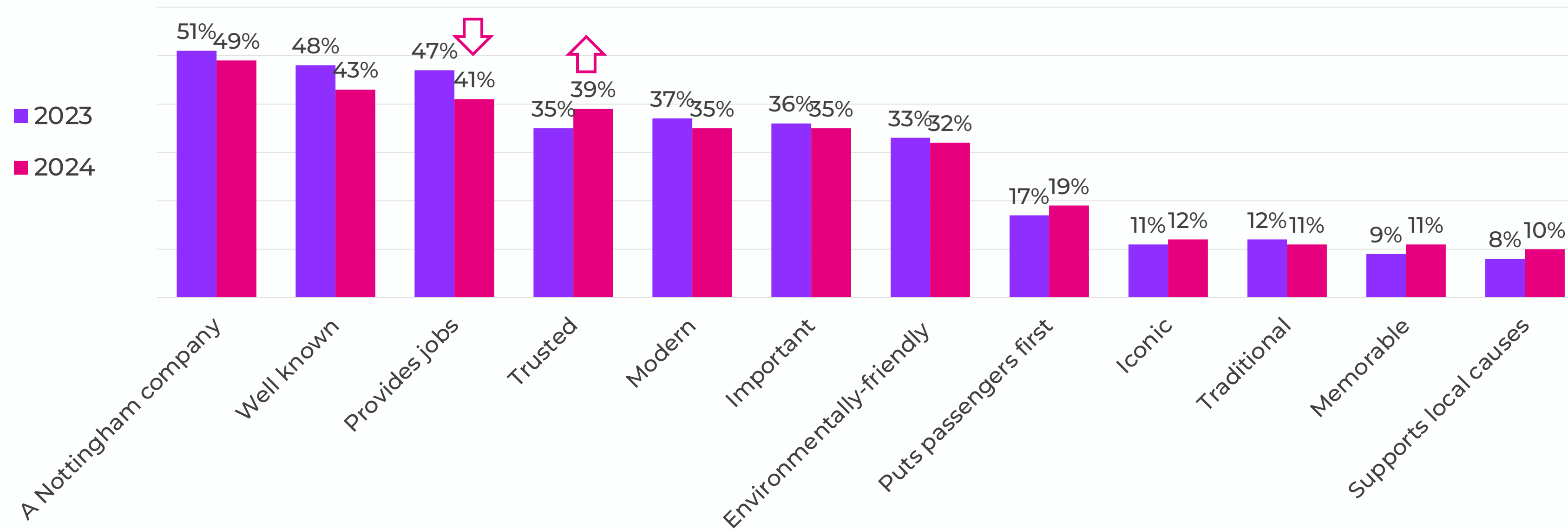
Of those who said they were not aware of NET Trams:




55%
are aware after seeing the NET logo



100%
after seeing picture of the tram

NET is well regarded amongst the general public in Nottingham.

Perceptions of NET as an organisation - total



 Under 35's less likely to agree NET 'provides jobs'
 Males and families more likely to agree NET is 'trusted'
 Perceptions of modernity is driven by family

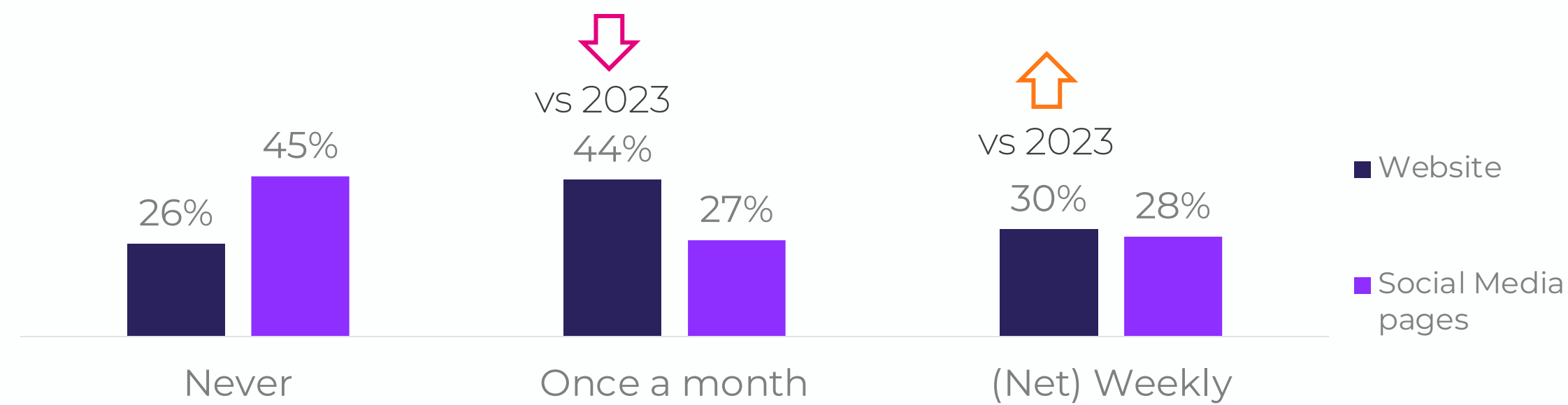
 = significantly higher
 = significantly lower



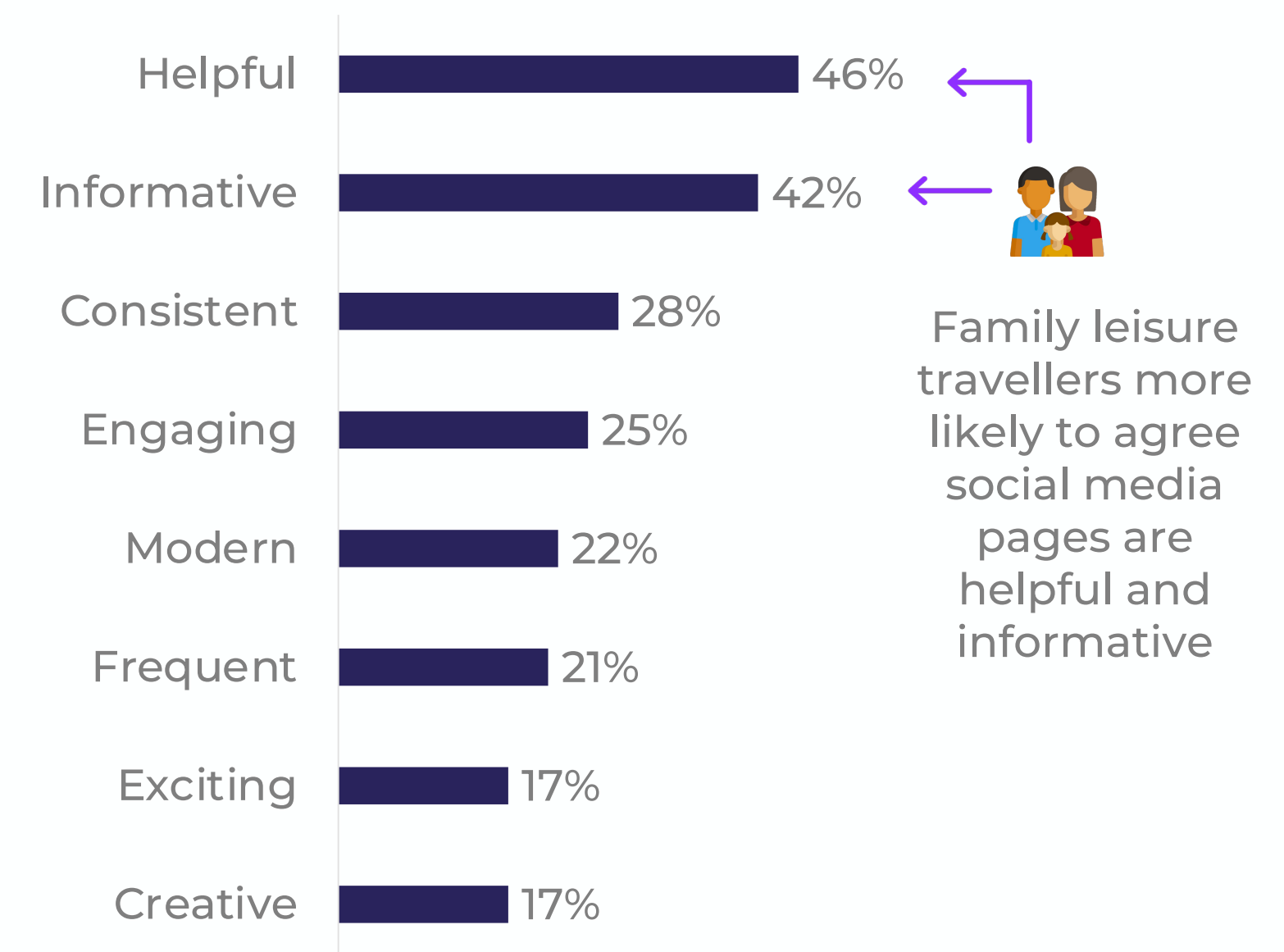
Q3 - Nottingham Express Transit (NET) (Nottingham Trams) has operated Nottingham's tram network since 2004. Which of the following best describe how you view NET (Nottingham Trams) as an organisation? Based on what you know about NET (Nottingham Trams)
 Base: 2023 n= 1202, 2024 n=1340

Tram users are engaging more with the website vs last year. Families find social media helpful & informative.

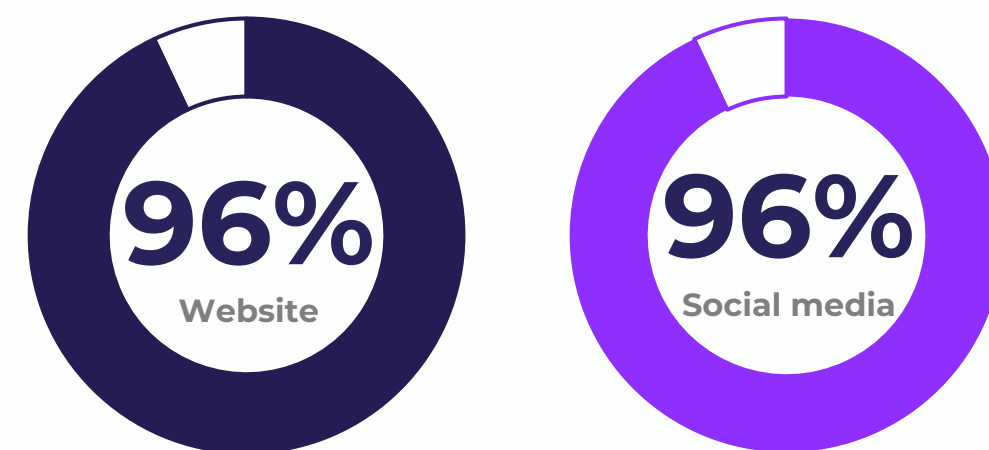
Frequency of visiting NET Trams website and Social Media pages – tram users



Description of social media pages over the last 3 months from those who have visited



Usefulness of the website and social media pages of those who visit



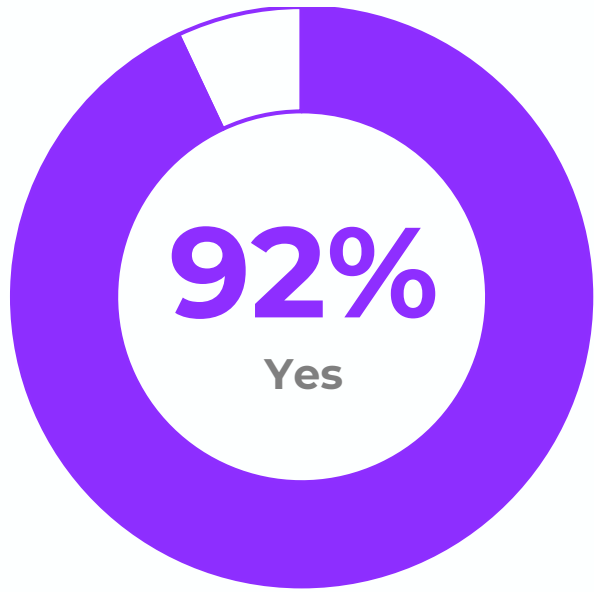
Q31 - How often do you visit the NET (Nottingham Trams) website?; Q32 - How useful do you find the NET (Nottingham Trams) website?; Q33 - How often do you visit the NET (Nottingham Trams) Social Media pages?; Q34 - How would you describe what you have seen on the NET (Nottingham Trams) social media pages over the last 3 months?; Q35 - Overall, how useful do you find the NET (Nottingham Trams) Social Media pages?
 Base: 2023 users = 802, 2024 users n=648

**NET trams service is highly regarded,
particularly amongst families.**

**Students and city workers are more
critical about the short-comings of
NET's service.**

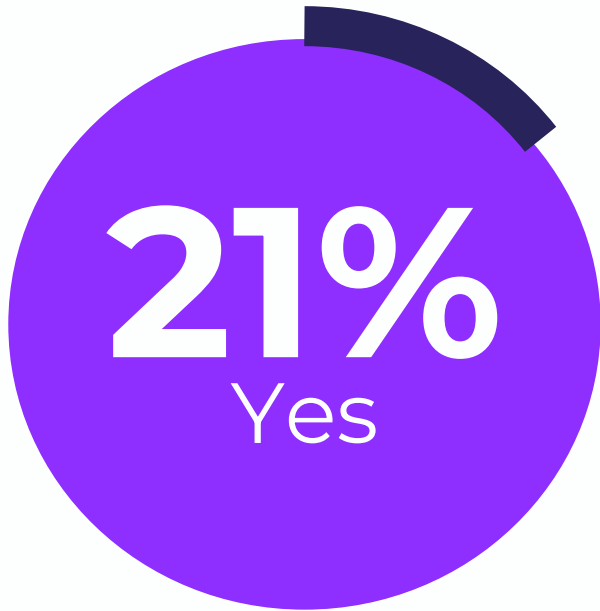
Advocacy for NET is high, particularly amongst families; customer service is viewed positively.

Would recommend NET



Of the small percentage who wouldn't recommend NET, price (64%) is the main reason.

Ever contacted customer services – tram users



Rate customer services – those who have contacted



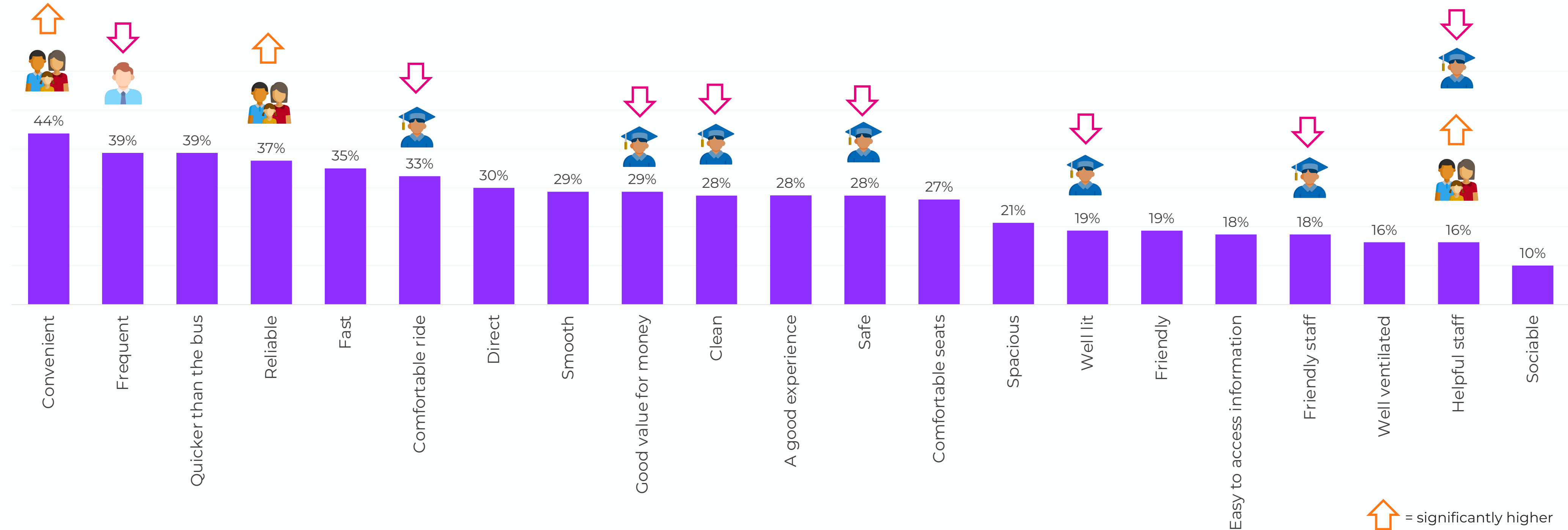
↑ = significantly higher
↓ = significantly lower





Q12a - Would you recommend the NET (Nottingham Trams) service to a friend or family member?: Q12b - Why wouldn't you recommend the NET (Nottingham Trams) service Base: 2023 n=802, 2024 n=935
Q18 - Have you ever contacted NET (Nottingham Trams) customer services?: Q19 - How would you rate NET (Nottingham Trams) customer services?
Base: 2023 n=802. 2024 n=935, those who contacted 2023 n=, contacted 2024 n= 193

Students & families are at odds over their views of NET's service.

Perceptions of NET's service, positive statements - total

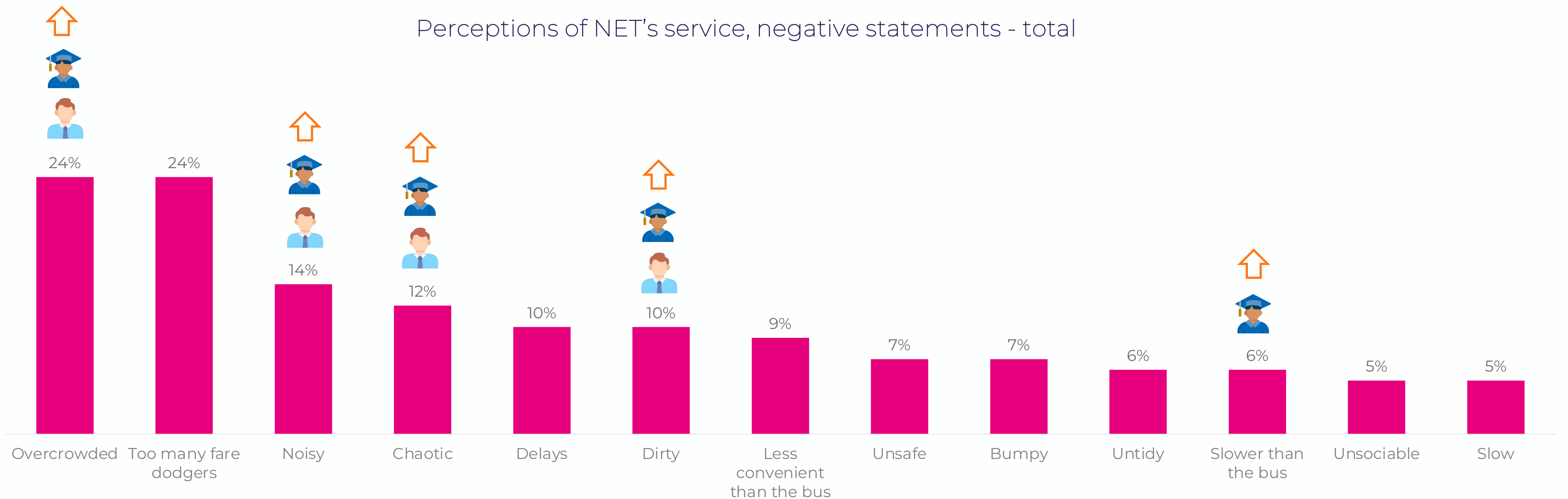




 = significantly higher
 = significantly lower



Q4 - Which of the following best describe how you think about Nottingham's tram service?
Base: 1340

Students and city workers are more critical about the short-comings of NET's service.



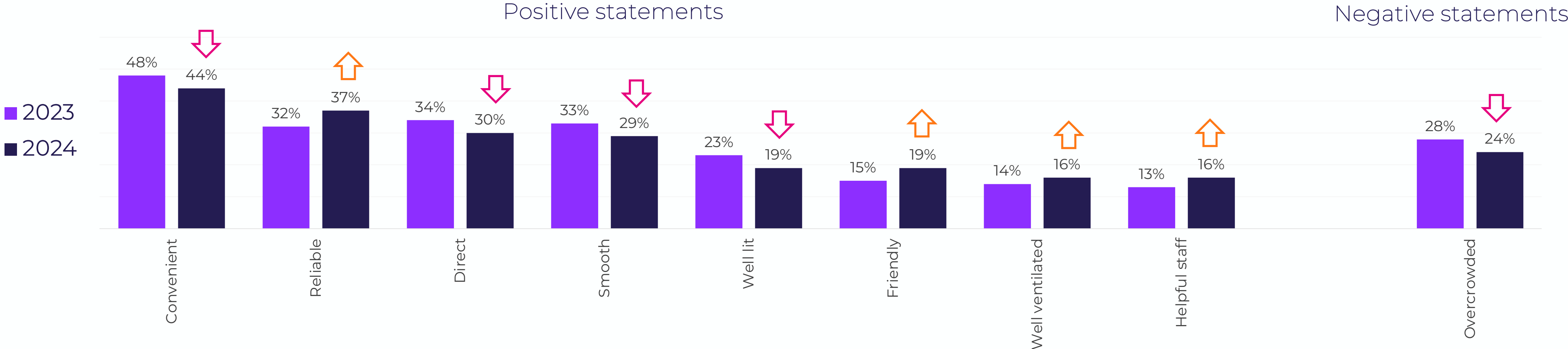
 = significantly higher
 = significantly lower



Q5 - Which of the following best describe how you think about Nottingham's tram service?
Base: 1340

Reliability and crowding have improved vs last year. Convenience has fallen.

Change in perceptions of NET's service - total



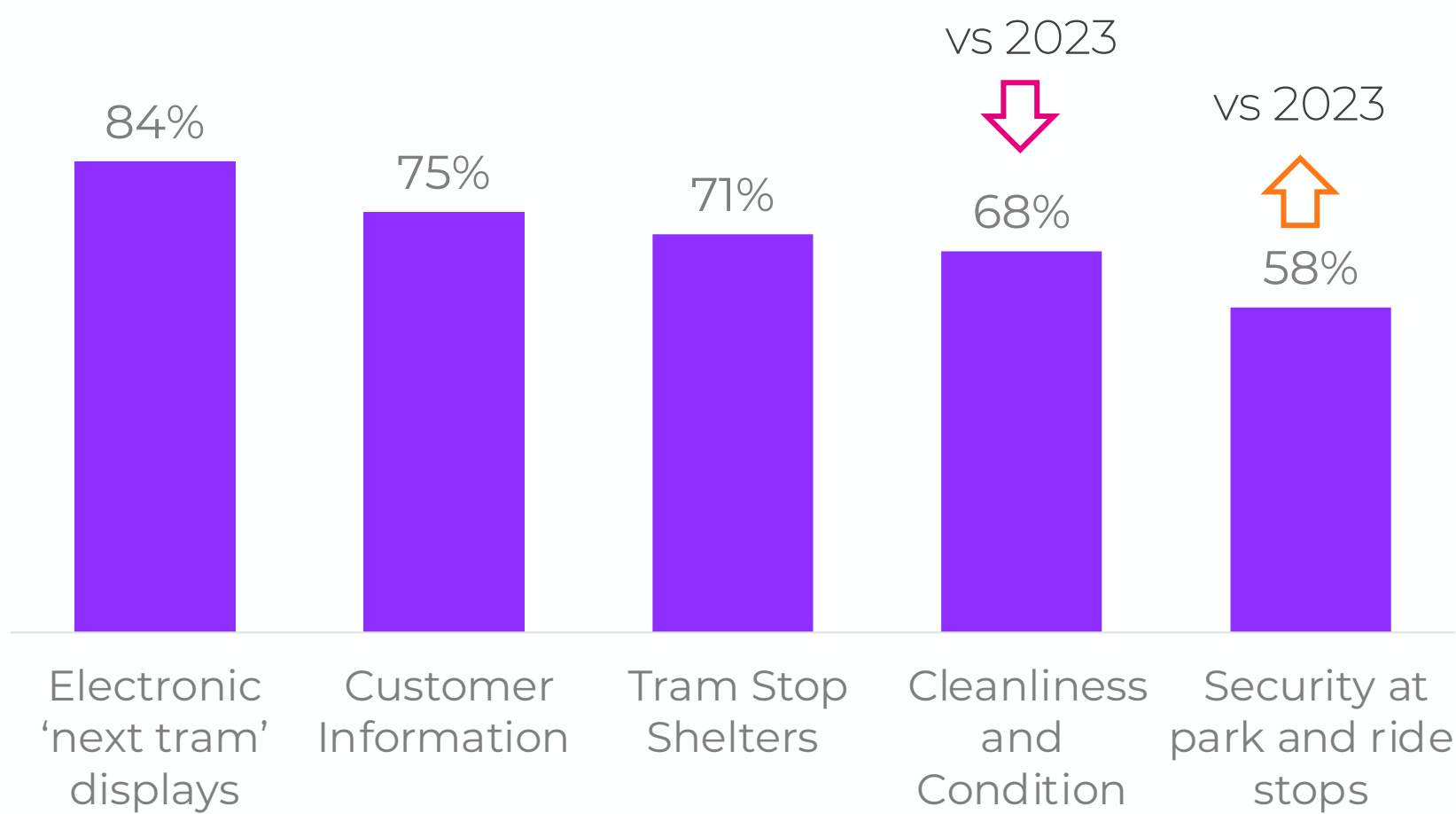
↑ = significantly higher
 ↓ = significantly lower



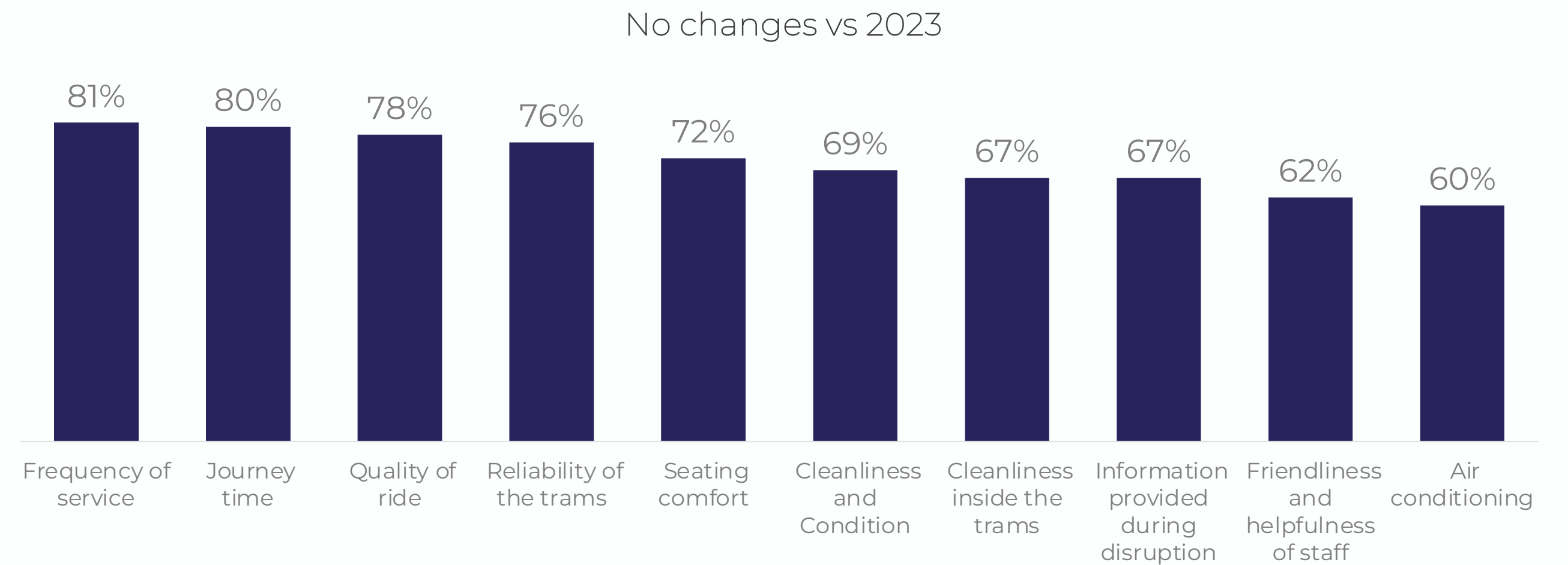
Q4 & Q5 - Which of the following best describe how you think about Nottingham's tram service?
 Base: 2023 n =1202, 2024 n=1340

On platform, cleanliness and condition have fallen this year; however, on board satisfaction remains steady.

On platform satisfaction (Net satisfaction) – tram users



On board satisfaction (Net satisfaction) – tram users



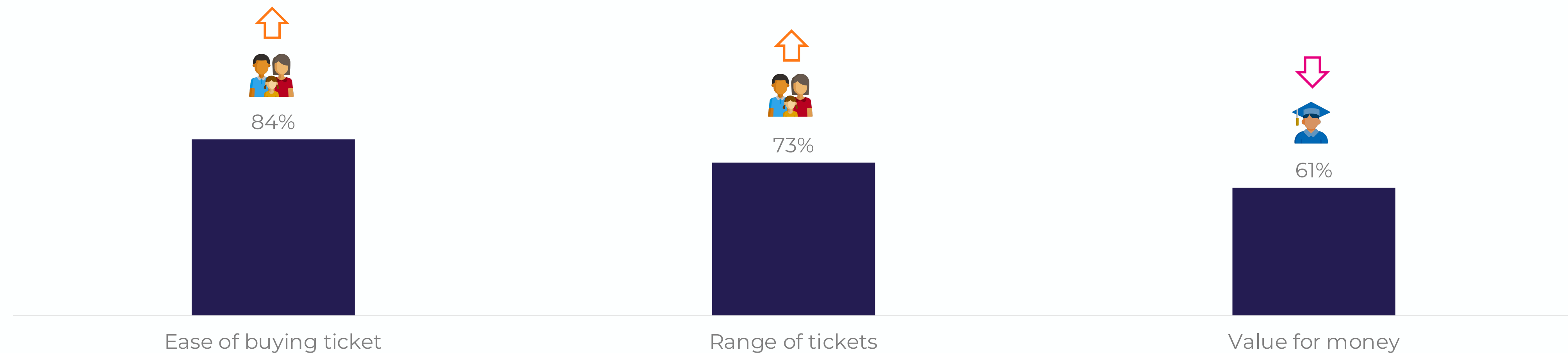
↑ = significantly higher
 ↓ = significantly lower





Q10 - When at a tram stop, how satisfied are you with the following?; Q11 - When on board the tram and throughout your journey, how satisfied are you with the following?
 Base: 2023 n=802, 2024 n=935

Families are satisfied with the ease of purchasing and the range of tickets available; students are dissatisfied with the VFM of tickets.

Ticket satisfaction (Net Satisfied) – tram users – total level

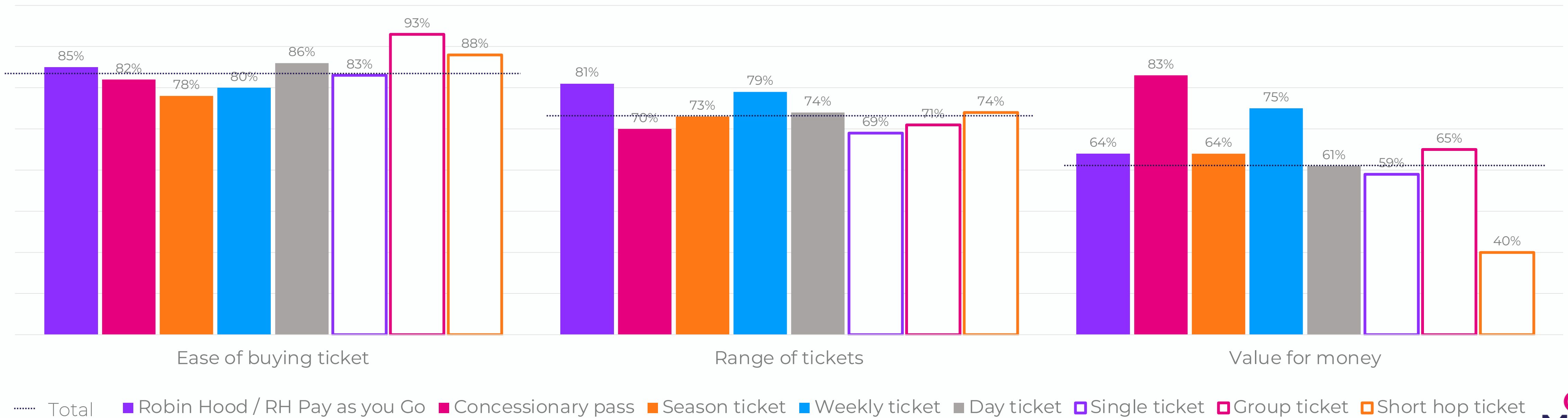


Q17 - How satisfied are you with the following aspects of tram tickets?
Base: tram users n=935

 = significantly higher
 = significantly lower

Those who purchase concessionary and weekly tickets have the strongest perception of VFM.

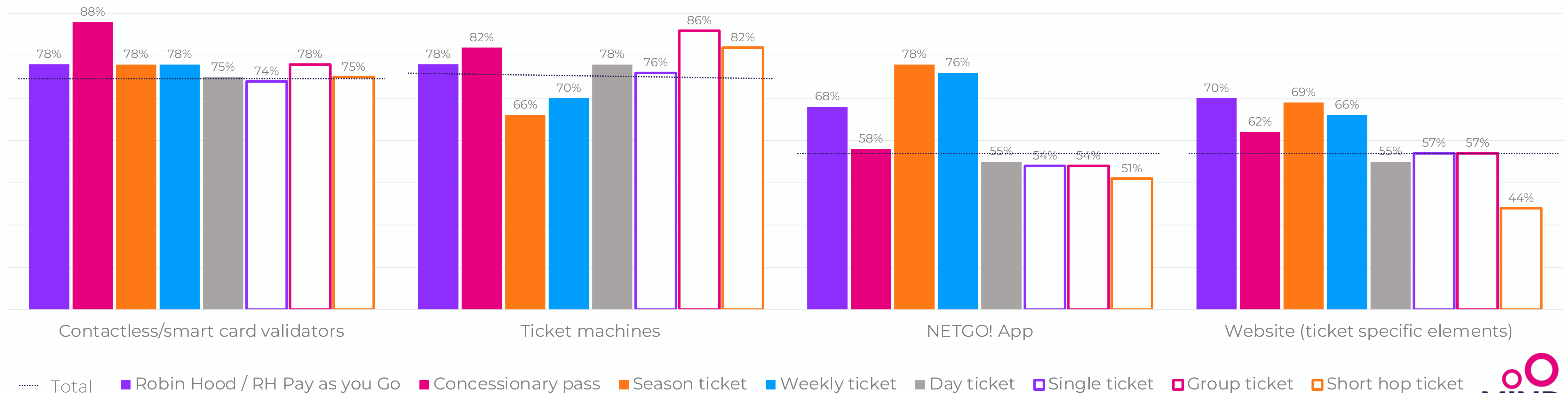
Ticket satisfaction (Net Satisfied) – tram users, by ticket purchased



Q17 - How satisfied are you with the following aspects of tram tickets?
 Base: total tram users n=935, RH 155, Concessionary 66, Season 80, Weekly 104, Day 493, Single 261, Group 72, Short hop 57

Those who buy Season and Weekly tickets are most likely to be satisfied with the NETGO! App.

Ticket satisfaction (Net Satisfied) – tram users, by ticket purchased



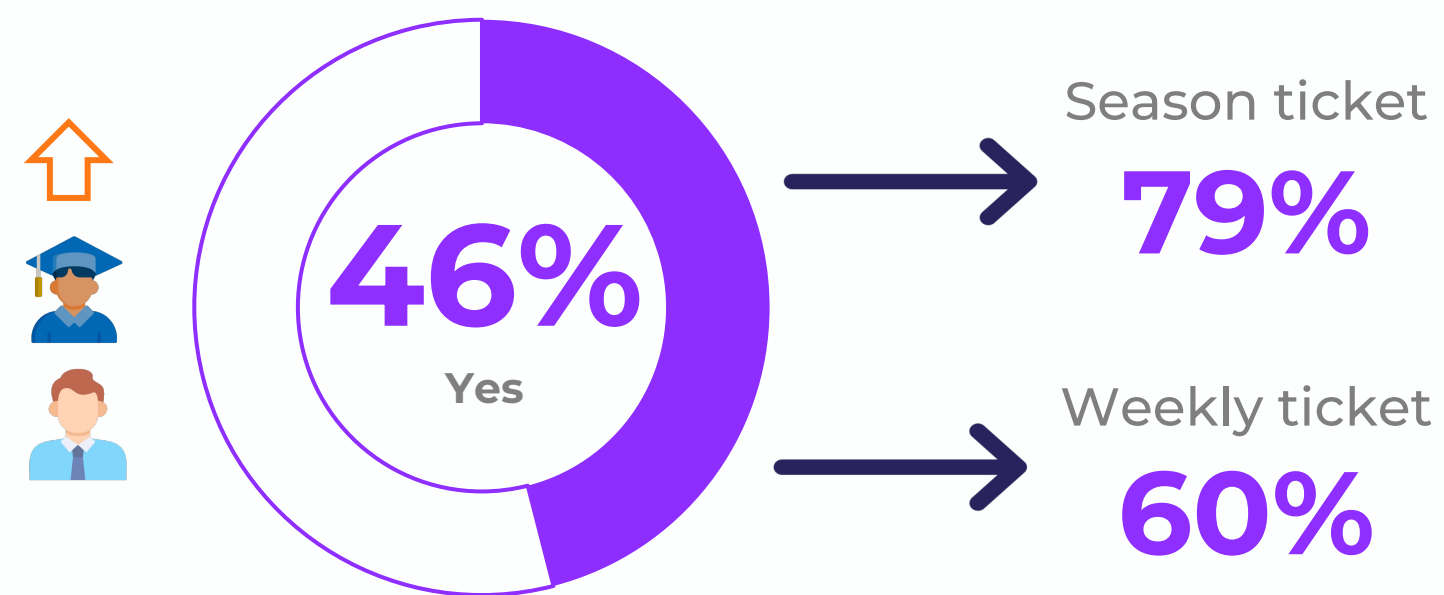
Q17 - How satisfied are you with the following aspects of tram tickets?
 Base: total tram users n=935, RH 155, Concessionary 66, Season 80, Weekly 104, Day 493, Single 261, Group 72, Short hop 57

**Rating of NET's service during
trackwork disruption has improved vs
last year.**

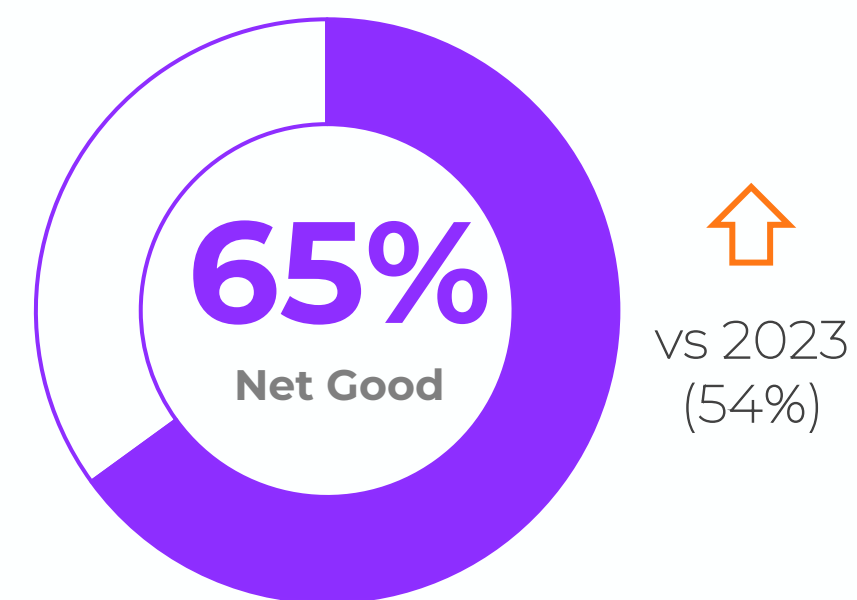
**Information provided is deemed
useful by passengers.**

Rating of NET's service during trackwork disruption has improved vs last year.

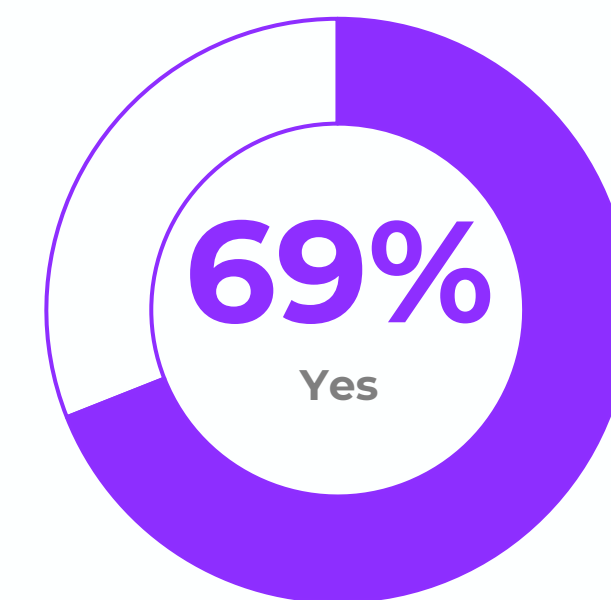
Have travelled during trackwork's – tram users



Rating of NET Trams during disrupted journey



Alternative transport provided

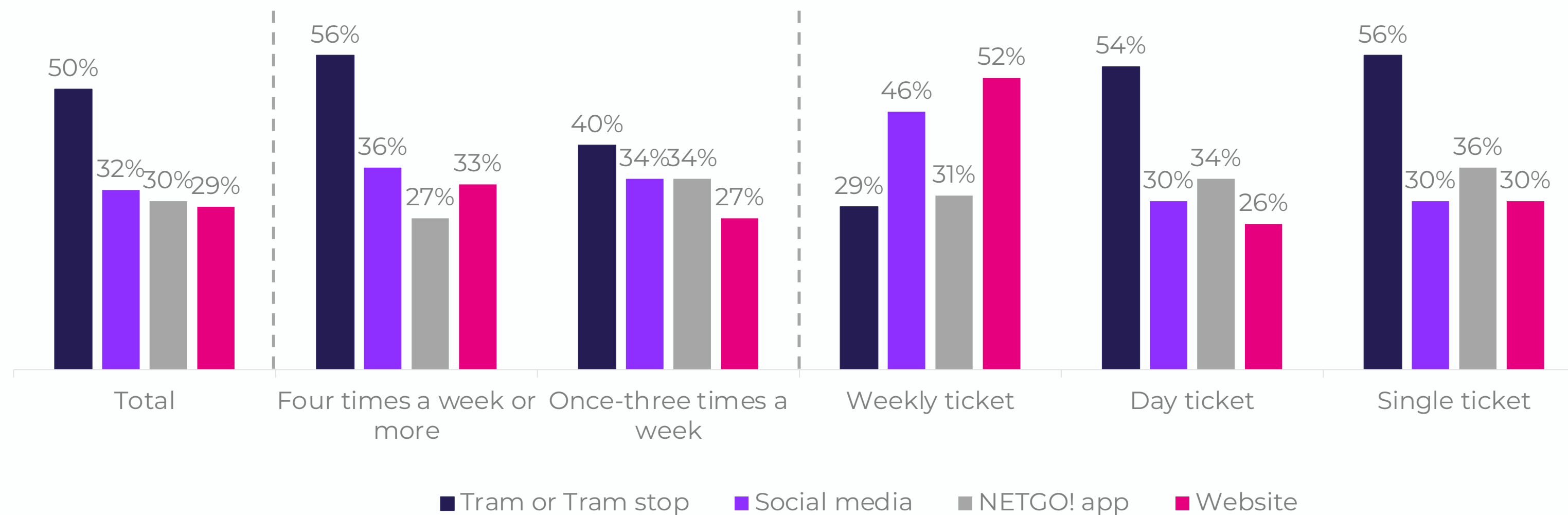


Q22 - Have you travelled during any trackworks or service disruption over the last 6 months?; Q25 - During your disrupted journey did you use the alternative transport if it was provided?; Q26 - How would you rate NET (Nottingham Trams) during your disrupted journey?
Base: tram users n=935, travelled during trackworks 302

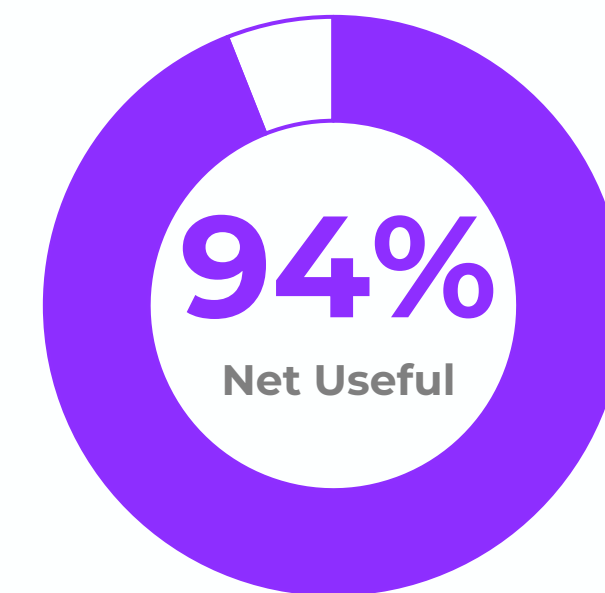
↑ = significantly higher
↓ = significantly lower

Tram or tram stops are the most used sources of information during disruption, but weekly ticket users are more likely to look online.

Where information was found during disruptions



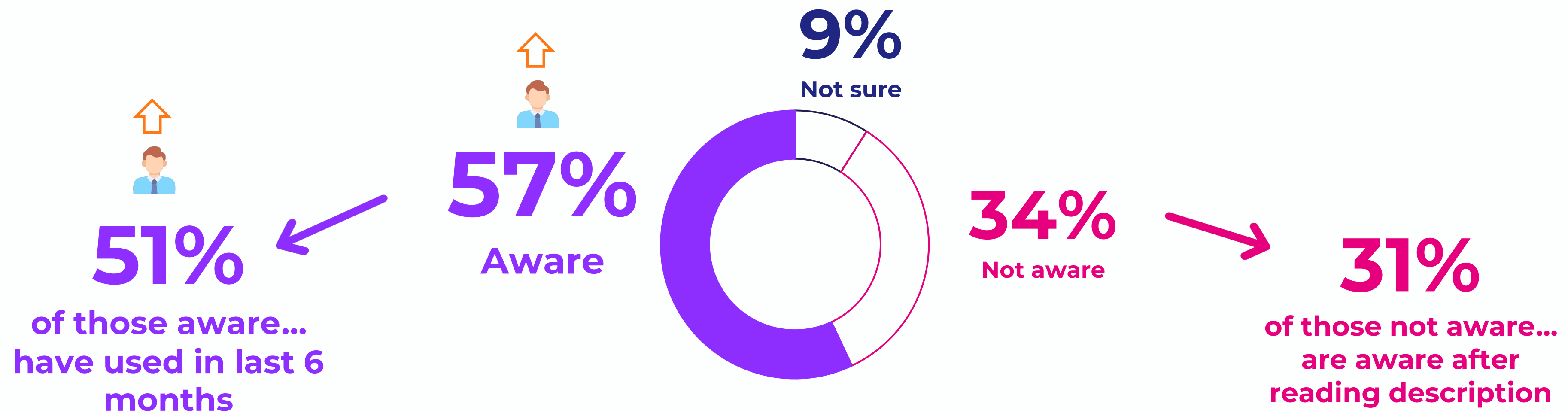
Rating of usefulness of information



Awareness of short hop tickets and the new contactless purchasing method is relatively high.

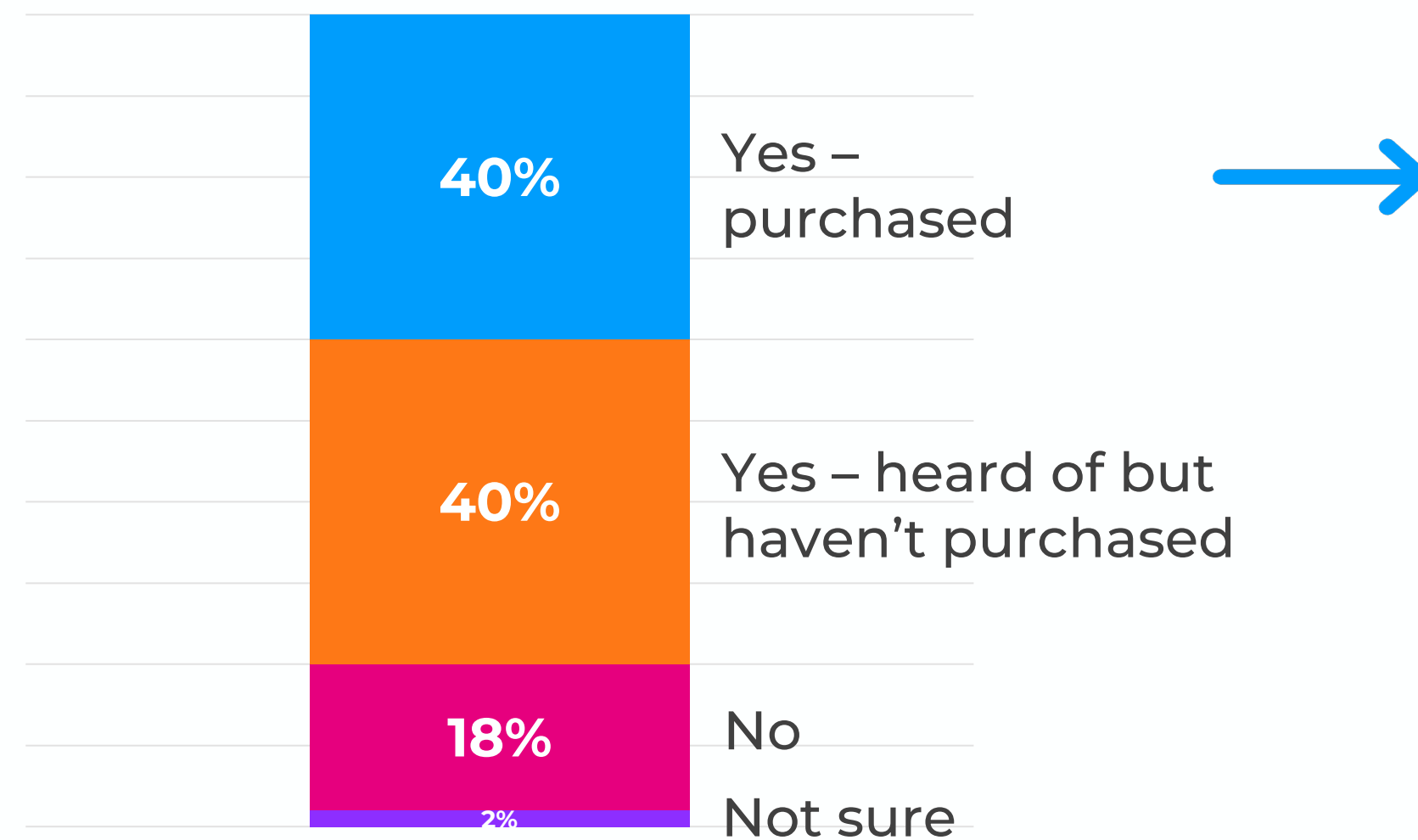
Over half of passengers are aware of short hop tickets, and usage is reasonably high.

Aware of short hop tickets

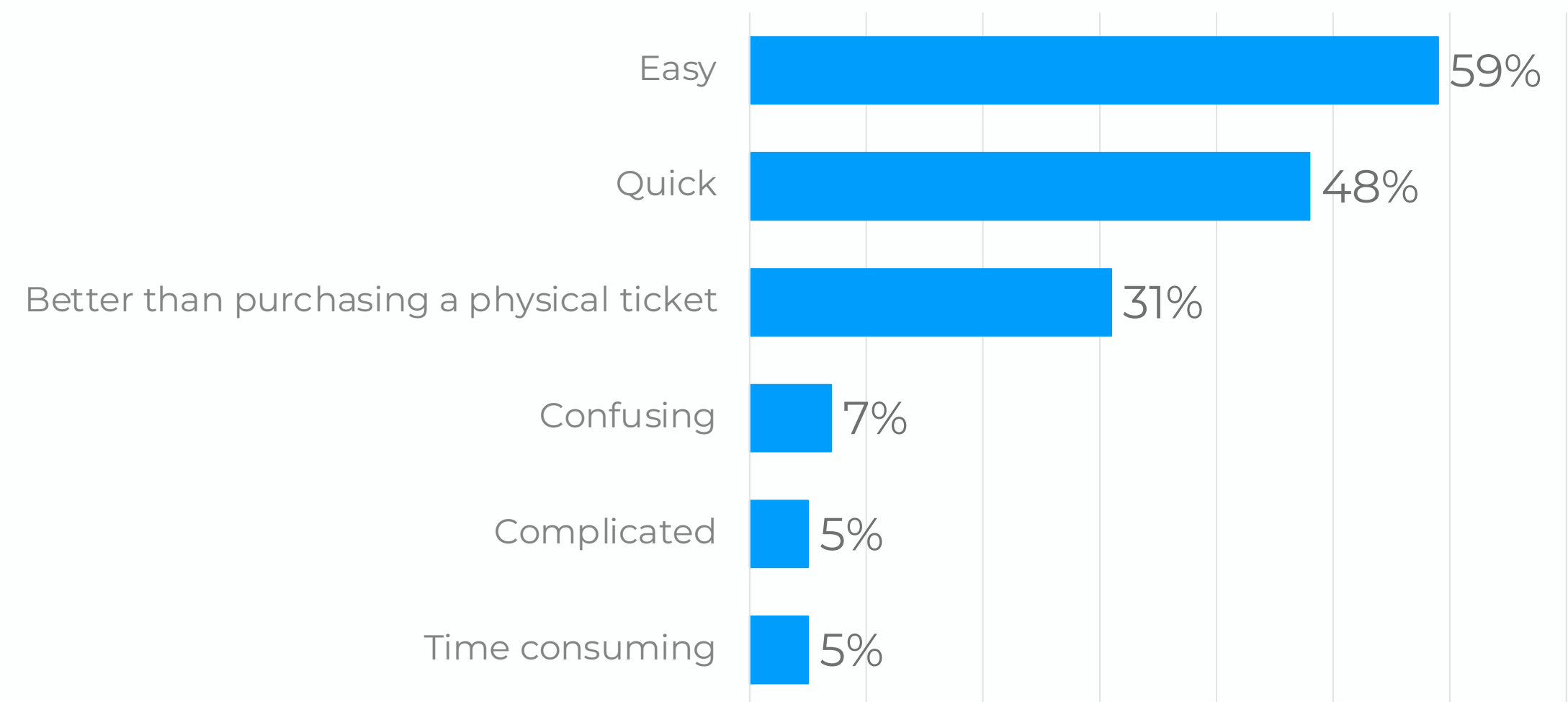


8 in 10 of those aware of short hop tickets have heard or used the new contactless method of purchase.

Aware of new contactless short hop tickets – those who are aware of short tickets



Experience of using contactless short hop tickets – those who have used



Q28NB. Are you aware of the new contactless method of paying for 'short hop' tickets? This involves tapping on using your contactless card or mobile device at a validator machine on the platform, and tapping off again once you reach your destination.. Base: Aware of short hop (370)
Q28NC. Which of the following describe your experience using the new contactless method of paying for a 'short hop' ticket? Base: purchased short shop contactless (148)

The background features several large, overlapping organic shapes in shades of blue and pink. The shapes are smooth and fluid, creating a modern, abstract aesthetic. The colors transition from a deep blue on the left to a vibrant pink on the right, with some shapes appearing as gradients. The overall composition is balanced and visually appealing.

Key insights and recommendations

Key insights and recommendations



**Young City Workers
are your core user,
they're highly
ENGAGED.**

This audience interact with NET at more touchpoints; they're significantly more likely to travel with you frequently, during trackworks, and using short-hop tickets.

However, this means they'll see the *highs* and the *lows*. There's more opportunity for issues to impact perceptions (such as overcrowding) and they'll notice differences in service.

Consider how you can keep them sweet and reward their loyalty.



**Families are your
most ENTHUSIASTIC
audience; a great
sign for growth.**

This audience are more likely to recommend and have stronger positive perceptions of service and tickets.

Focus on encouraging them to advocate for NET – they are willing to spread the word, and their reviews will be positive (especially if we make their lives easier).

How can we encourage them? ...
Partnerships with leisure attractions (dual tickets), friends and family tickets, family-friendly themes/events.



**Focus on
EXPANDING the
student audience.**

Students don't use the tram for study-related travel but do for work and leisure travel. However, they report anticipating that their travel choices will change over the next 3 months, favouring the train.

Improving VFM perceptions will be key to serving this developing audience.

VFM doesn't necessarily just = cheaper. Use messaging to directly speak to the benefits and value of the trams vs train (quicker, cleaner, friendlier).



Keep in touch

Joanna Brown
Research Director
joanna.brown@mindfieldadvertising.com
07898 887311

Hannah Tales
Senior Research Manager
Hannah.tales@mindfieldadvertising.com

Hannah Abraham
Research Manager
hannah.abraham@mindfieldadvertising.com



**MIND
FIELD**