

York Transport Consultation – Key Findings Report (Visitors)

For York Civic Trust, York Environment Forum and
York Bus Forum

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Final Draft



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This research has been carried out in compliance with the International standard ISO 20252, (the International Standard for Market and Social research), The Market Research Society's Code of Conduct and UK Data Protection law

1. Introduction

Qa Research is pleased to submit this report to York Civic Trust, York Environment Forum and York Bus Forum, which outlines the key findings from a survey of visitors to York. Along with surveys of residents and commuters (reported separately) the three strands are collectively referred to as the York Transport Consultation 2019.

Whilst this report summarises key findings from the research, a full dataset will be issued to York Civic Trust, York Environment Forum and York Bus Forum for further analysis. The results of the research will inform the development of York's next Local Transport Plan, which will set out the intended direction of policy related to travel and transport in the city.

2. Aims and objectives

The principal objectives of the research with visitors were to:

- Build a picture of the modes of transport that visitors use to get to and travel around York;
- Identify whether transport acts as a barrier to any activities;
- Investigate expectations for future travel preferences;
- Establish aspirations for desirable attributes of York's future transport system;
- Capture suggestions for actions which might be taken to realise those aspirations;
- Identify any differences between sub-groups of the sample.

3. Methodology

The visitor research was conducted using quantitative face to face interviews. A visitor was defined as anyone who is not a York resident or a regular commuter into York. This included those making every day or one-off shopping trips, leisure visitors and those on business trips.

Interviews were undertaken between 15th and 28th September 2019, with a second wave during half term in order to access different types of visitor groups e.g. those with school age children (between 26th October and 3rd November 2019).

Interviewers using a set questionnaire were stationed at various points both in the city centre and in outlying shopping centres (apart from the Designer Outlet where permission was not granted to interview) to ensure a broad mix of visitors were accessed. Due to difficulties faced in finding visitors (as opposed to York residents) in outlying shopping centre locations, a decision was taken to allocate more shifts to city centre locations than the originally planned 50/50 split.

During the September shifts 72% of interviews were undertaken in the city centre, whereas during half term (October-November) this increased to 91%.

The actual interview dates and survey points were:

Date	No of shifts	Interviews achieved	Interviewer location
Sunday 15 th September – Saturday 28 th September	4	98	Coppergate Parliament Street Minster area St Helen's Square
	2	36	Vanguard Clifton Moor
Sunday 26 th October – Sunday 3 rd November	5	125	Coppergate Parliament Street Minster area St Helen's Square
	1	13	Vanguard
Total:	12	272	

All data processing, coding and data preparation was carried out in-house by Qa Research.

The overall sample of 272 provides results which at an overall level are accurate to within +/- 5.9% at 95% confidence.

4. Key findings

4.1 Profile of respondents

As shown in Figure 1, the visitors interviewed were evenly split between being male (49%) and female (51%).

Three-fifths (59%) were aged 45-64, with a further quarter (25%) aged 25-44. A minority were aged 16-24 (3%) or 65+ (13%).

Visitors were relatively evenly split in terms of how far they had travelled, with 36% living within Yorkshire & the Humber, 27% living elsewhere within the UK and 37% living overseas.

Figure 1: Demographic profile of visitors

	Percentage
Male	49%
Female	51%
16-24	3%
25-44	25%
45-64	59%
65+	13%
Yorkshire & Humber	36%
Rest of UK	27%
Overseas	37%
Base	272

Other information provided by visitors adds additional detail to their demographic profile:

- Four-fifths (80%) were leisure visitors (increasing to 90% of those interviewed in the city centre), with 10% on a one-off shopping trip (increasing to 33% of those interviewed at an outlying shopping centre), 8% on an everyday shopping trip (increasing to 31% of those interviewed at an outlying shopping centre) and 2% on a business trip;
- Nearly half (46%) were staying overnight in York (increasing to 55% of those interviewed in the city centre), whilst 17% were on a day trip whilst staying outside York and 36% were making a day trip from home (increasing to 78% of those interviewed at an outlying shopping centre);
- More than half (55%, increasing to 67% of leisure visitors) were first time visitors, and where respondents had visited before they tended to have visited a few times (29% had visited three or more times in the last 12 months, increasing to 73% of those interviewed at an outlying shopping centre);
- Respondents participated in a variety of activities whilst in York. Shopping (in regular shops) (85%), eating/drinking out (83%), strolling and enjoying the ambience (83%), shopping in markets (59%) and visiting museums/attractions (56%) were the most popular.

4.2 Transport usage in York

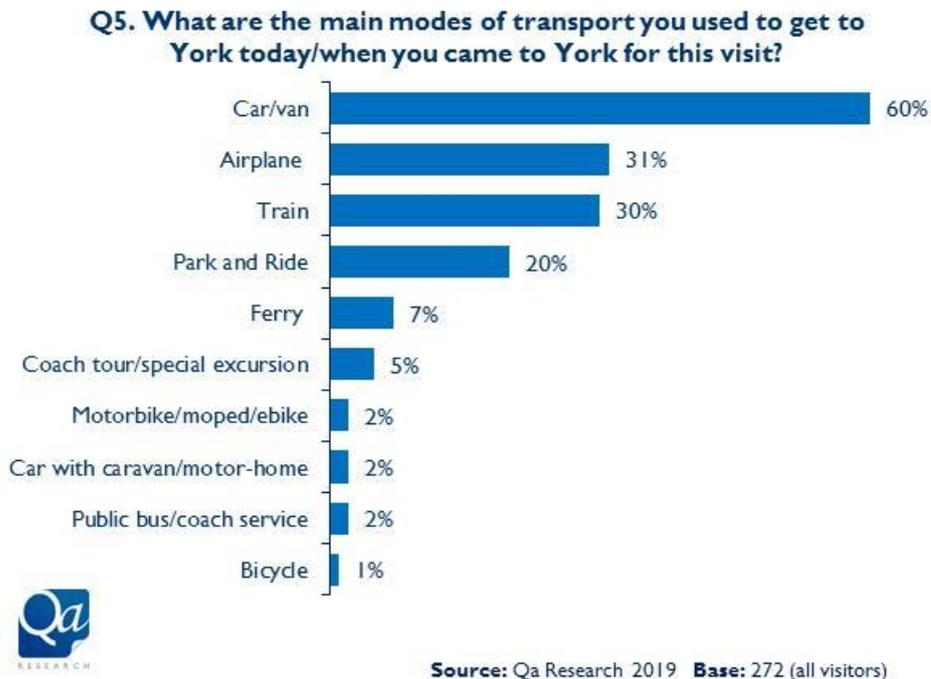
Firstly, current demand on York's transport system was assessed by identifying which methods of transport had been used to get to York.

Figure 2 shows all modes of transport used to get to York. Three-fifths (60%) had used a car/van at some point during their journey, including virtually all (96%) of those visiting for either an everyday or one-off shopping trip.

Three in ten (31%) had used an airplane during their journey, increasing to 83% of overseas visitors.

Other common modes of transport used to get to York include a train (30%) and the Park and Ride (20%).

Figure 2: Main mode(s) of transport used to travel to York



In terms of demand on York's transport system, the mode of transport used when actually arriving into York is a key factor. Figure 3 shows that two-fifths (41%) of visitors actually arrived into York in a car/van, including 81% of those visiting for an everyday shopping trip and 68% of those visiting for a one-off shopping trip. Almost all (96%) of those interviewed at an outlying shopping centre had arrived into York in a car/van, compared to just 29% of those interviewed in the city centre.

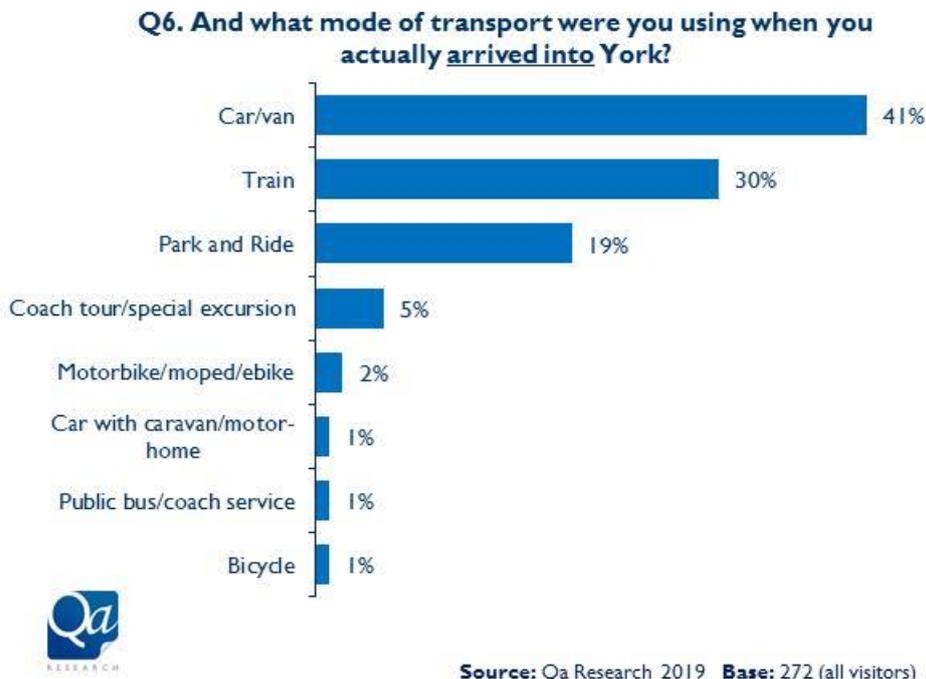
Car usage is higher amongst more local visitors (85% who live in Yorkshire & Humber, 61% rest of the UK and 36% overseas), which is also reflected in the 79% of regular visitors (visited York 3+ times in the last 12 months) and the difference between first time visitors (49%) and those who have visited before (73%).

Three in ten visitors (30%) arrived into York on a train and the majority of those using a train were leisure visitors (95% of all those arriving on a train). Those who live overseas were most likely to arrive into York on a train (45%), and it was also the most frequent mode of arrival transport amongst those interviewed in the city centre (36%).

Around one in five (19%) arrived into York using the Park and Ride, this being most common amongst those who live in Yorkshire & the Humber (29%) and those interviewed in the city centre (24%).

Just 5% of visitors had arrived on a coach tour or special excursion (all interviewed in the city centre), but only a tiny minority had used other modes of transport including public bus or coach services (1%).

Figure 3: Mode of transport used when arriving into York



Visitors were also asked what modes of transport they had used during their visit to get around York. The vast majority (98%) had walked between venues, and there was very limited usage of other transport modes and hence little additional demand on public transport. The next most common mode of transport used was the land train to the National Railway Museum, used by just 3% of visitors. A very small minority had used public bus or coach services (3%), taxis (2%) or the Park and Ride (1%).

4.3 Barriers to travel

All visitors were asked how easy or difficult they had found their journey to York (with specific reference to the mode of transport they used to arrive in York) and also getting around York during their visit.

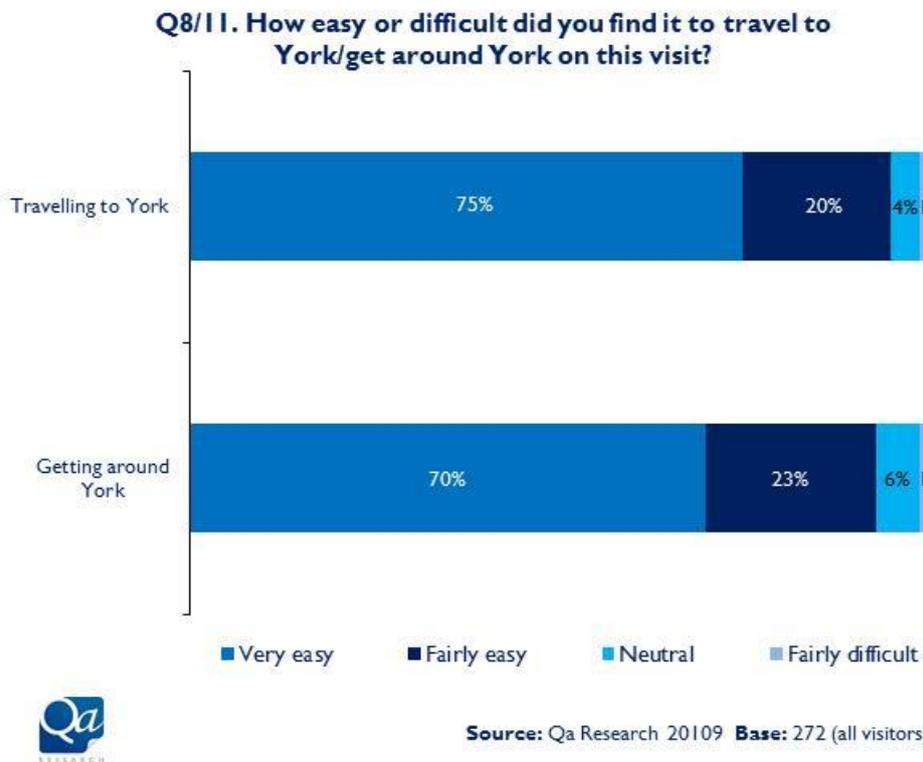
As shown in Figure 4, results were very positive, with virtually all (95%) saying that their journey to York had been easy, including 75% rating it as very easy. Just 1% (three visitors, one of whom had arrived in a car/van and two who had arrived on a train, all interviewed in the city centre during half term) said that their journey to York had been fairly difficult. The car user cited delays, congestion and car parking costs as a reason for this, whilst the train users cited delays and frequency of transport.

In contrast 99% or 111 out of 112 car users and 98% of all train users (79 out of 81) said they had no difficulties in using this mode of transport to get to York.

Similarly the vast majority of visitors (93%) reported that getting around York had been easy, including 70% rating it as very easy. Again, just 1% (four visitors) said that getting around York had been fairly difficult. All of those facing difficulties were in the 45-64 age group, had travelled to York from within the UK and were interviewed in the city centre. All visitors experiencing

difficulties said that this related to walking and specific reasons given were poor signposting, congestion on the streets from delivery vehicles and physical difficulties.

Figure 4: Whether found travelling to or getting around York easy or difficult



All visitors were also asked whether there were any activities that they felt they could not do, or places that they could not get to, because of local transport in York. The majority (90%) had not experienced any problems, and those who gave a response cited a wide variety of issues. Given that many visitors only walked around York during their visit, most issues concerned navigating the city centre e.g. poor signposting for attractions, drop off points being too far from hotels, path surfaces being poor or confusion over Park and Ride stops. Just two visitors mentioned specific places or activities that they could not get to, namely, Pickering (there being no train) and Castle Howard (despite there being local bus services to both destinations).

4.4 Future demand on York’s transport system

Three-fifths (60%) of visitors feel that they are likely to return to York in the next two years, including 46% who are very likely to do so. This includes all of those on everyday shopping trips or business trips and most (89%) of those on a one-off shopping trip. Distance travelled from home was an unsurprising factor here with those who live in Yorkshire & the Humber (98%), more likely than those who live elsewhere in the UK (77%) or overseas (11%) to say that they are likely to visit again in the next two years.

Those who think they will visit again in the next two years were asked to provide an estimate of (a) whether they expect their usage of each mode of transport to increase, stay the same or decrease and (b) whether they would like their usage of each mode of transport to increase, stay the same or decrease when travelling to York.

Figure 5 shows the % of visitors likely to visit York in the next two years that (a) used each mode of transport to travel to York for this visit (b) are expecting to use each mode of transport in two years' time, including those expecting an increase and (c) would like to use each mode of transport in two years' time, including those who would like usage to increase. Interestingly a much higher proportion of visitors expect or would prefer to use Park and Ride and train than do so now (e.g. 23% used the Park and Ride on their current visit, but 44% expect to use it in two years' time, and likewise 23% used a train on their current visit, but 35% expect to use one in two years' time).

Overall, there is very little variation between the modes of transport that visitors expect to be using when visiting York in the next two years, and those that they would like to be using. This suggests that supply is generally meeting demand in terms of the transport needs of visitors (or that behaviours are unlikely to change unless some major change or intervention occurs).

Just over three-quarters (77%) of visitors expect to be using a car/van when travelling to York in the next two years, with a similar proportion (76%) saying that they would like to use a car/van. Only a minority expect or would like (3% and 4% respectively) to be using a car/van more than they are now.

There is also continued demand for public transport with 44% of visitors expecting to be using a Park and Ride service when travelling to York in the next two years (with 45% saying that they would like to use the Park and Ride). Just 5% expect or would like their usage of Park and Ride to increase when compared to their usage now (just 1% expect their usage will decrease).

Just over a third of visitors (35%) expect to be using a train when travelling to York in the next two years (with 36% saying that they would like to use a train). Train usage is the largest likely growth area, with 8% expecting their usage to increase and 9% saying that they would like their usage to increase (just 1% expect their usage will decrease).

Around one in ten visitors expect or would like to use public bus services, but other modes of transport are only used by a tiny minority of visitors.

Figure 5: Future expected/desired changes to transport mode usage

Mode of transport	% used on current visit	% expecting to use	% expecting an increase	% would like to use	% would like use to increase
Car/van	71%	77%	3%	76%	4%
Park and Ride	23%	44%	5%	45%	5%
Train	23%	35%	8%	36%	9%
Public bus/coach service	3%	9%	4%	9%	2%
Bicycle	1%	4%	2%	4%	2%
Airplane	4%	3%	0%	3%	0%
Car with caravan/motor-home	3%	3%	0%	3%	0%
Ferry	3%	3%	0%	3%	0%
Coach tour/special excursion	1%	2%	1%	1%	0%
Motorbike/moped/Ebike	2%	2%	1%	2%	1%
Taxi	0%	1%	0%	1%	0%
Something else	1%	1%	0%	1%	0%
Base	164	164	164	164	164

4.5 Influencing car usage

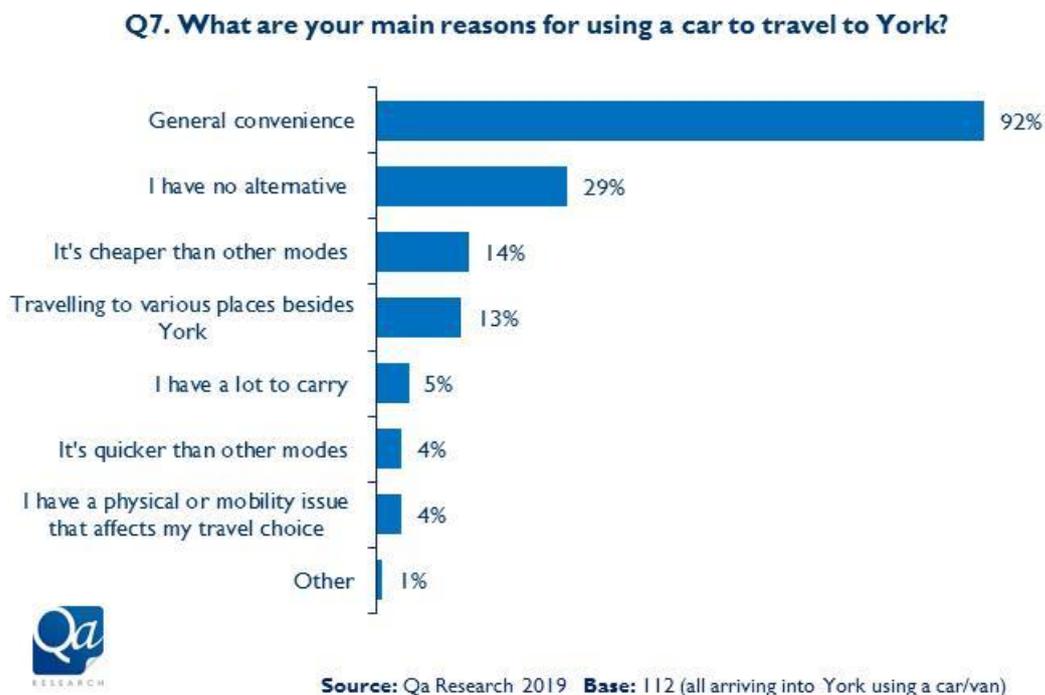
Those who arrived into York using a car/van were asked why this was. As shown in Figure 6 the vast majority (92%) said that it was the general convenience of using a car that was the main reason for doing so (increasing to 96% of those on an overnight trip away from home).

Three in ten (29%) said that they have no alternative, which increased to 49% of those on a day trip, presumably linked to the availability or accessibility of public transport near to their home.

Therefore 71% of car users have alternative options but have not been persuaded to use these rather than coming by car when travelling to York.

A car being cheaper than other modes of transport (14%) and needing to travel around to other places (13%) were the next most common reasons for car usage. Overnight visitors (primarily those travelling from outside of Yorkshire & the Humber or from overseas) were more likely to cite both of these reasons as a factor in their decision to travel by car (25% and 27% respectively).

Figure 6: Reasons for using a car



Visitors were also asked to what extent a variety of changes might impact on their choices regarding car usage. The question was only asked of those expecting or preferring their car usage to increase when visiting York in the next two years and as shown in Figure 5 this is only a small minority of visitors (just eight in total). A score out of 5, where 1 was no influence and 5 was a lot of influence, was given and a mean score is compared for each possible change.

Improvements to York's public transport system is the most likely to influence a reduction in car usage for these visitors. Cheaper buses and trains, more reliable buses and trains, more direct train services and buses and trains at the times I need them are all influential factors. They were overall slightly more likely to be influential than 'penalties' placed on driving itself such as increased or more widespread parking charges and increased fuel prices, although congestion charging was a more influential factor.

4.6 Problems impacting on York’s transport system

All visitors were presented with a list of potential problems as a result of the transport system in York. Figure 7 shows the percentage considering each problem as being ‘serious’ (either fairly or very) and also ‘very serious’.

Congestion would appear to be the major problem as far as visitors are concerned, with more than half (55%) rating it as serious (including 16% rating congestion as very serious). This increased to two-thirds (67%) of those arriving into York in a car/van (including 26% rating congestion as a very serious problem). It was a particular issue for those interviewed at an outlying shopping centre (82%, including 39% rating congestion as very serious).

Environmental concerns were the next most serious, with 27% of visitors rating local air pollution from traffic as a serious problem (particularly those who live in Yorkshire & the Humber 39% and those interviewed at an outlying shopping centre 49%) and 19% rating the impact on transport on climate change as a serious problem (just 5% of visitors in each case rated the issue as very serious).

Unduly large delivery vehicles (18%) and traffic in residential/shopping streets (13%) were considered to be the next most serious issues. Other potential issues were generally not considered to be serious.

Figure 7: Seriousness of problems in York

Problem	% Serious	% Very Serious
Congestion	55%	16%
Local air pollution from traffic	27%	5%
Impact of transport on climate change	19%	5%
Unduly large delivery vehicles	18%	3%
Traffic in residential and shopping streets	13%	2%
Danger from traffic	8%	1%
Noise from traffic	4%	1%
Visual quality (i.e. spoiling the look of the local area)	3%	1%
Difficulty in getting to places I want to visit	1%	0%
Concern over personal security	<0.5%	0%
Sharing of space with other users	0%	0%
Need to restrict what others (e.g. children, elderly) do	0%	0%
Negative impact on physical fitness	0%	0%
Base	272	272

Visitors were also presented with a list of potential problems for them as a user of the transport system in York. Figure 8 again shows the percentage considering each problem as being ‘serious’ (either fairly or very) and also ‘very serious’.

Less than one in ten visitors regarded each possible problem area as a serious one for them as a user of transport in York. There were however differences based on mode of transport used to get to York, with 19% of those arriving into York in a car considering ‘delays and unreliability in your journeys by car’ to be a serious problem. This was also more likely to impact on those interviewed at an outlying shopping centre (31% rating it as a serious problem).

The fact that many visitors travel around on foot within York is perhaps a factor in ‘problems crossing roads as a walker or a cyclist’ and a ‘lack of segregated cycle routes’ being the next most likely issues to be rated as serious (but still only by 7% of visitors).

Figure 8: Seriousness of problems for the individual as a user of transport in York

Problem	% Serious	% Very Serious
Delays and unreliability in your journeys by car	8%	<0.5%
Lack of segregated cycle routes	7%	3%
Problems crossing roads as a walker or cyclist	7%	1%
Inadequate information on transport services	4%	1%
Lack of a direct bus service	3%	1%
Incomplete cycle routes	3%	1%
Parking in inappropriate places	2%	<0.5%
Bus services not running at times I need them	1%	1%
Lack of secure cycle parking	1%	1%
Unsafe or incomplete walking routes	1%	<0.5%
Delays and unreliability in your journeys by bus	0%	0%
Base	272	272

4.7 Suggested actions to tackle the most serious travel problems

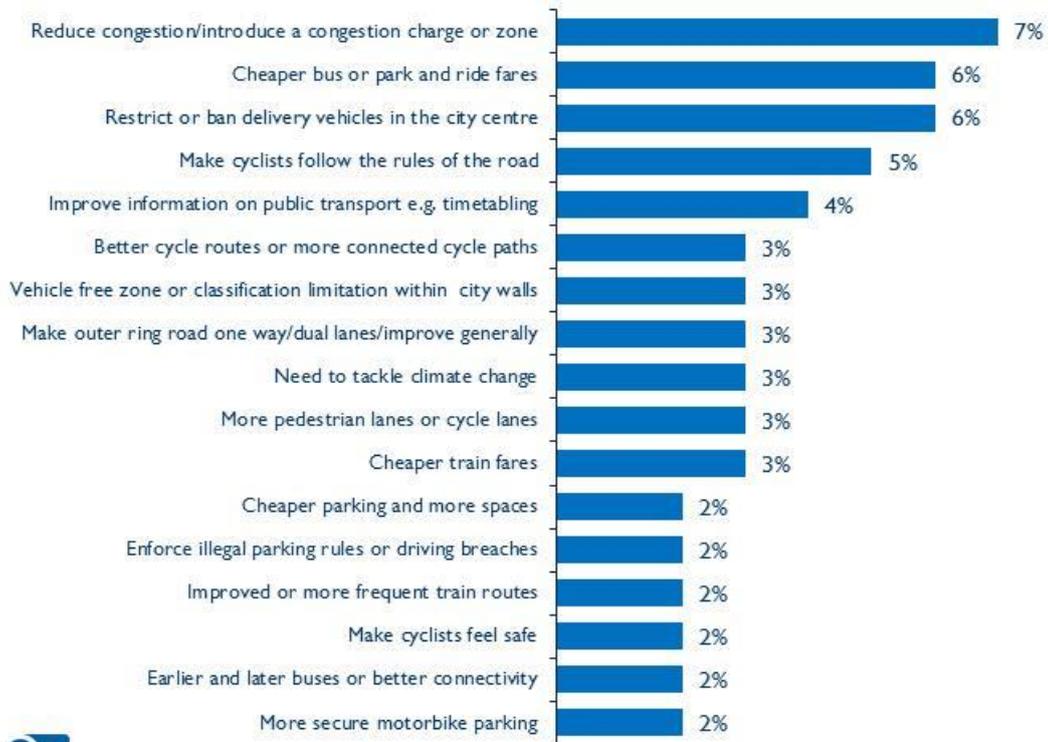
Visitors were asked whether they had any suggestions for actions to tackle the most serious problems identified in this section. More than half (56%) could not think of or provide an answer, underlining the results in figures 7 and 8 that most problems were not regarded to be serious. Those who provided suggestions gave a wide range of responses and figure 9 shows the most common themes emerging (all other responses were provided by 1% or fewer).

Reiterating the fact that ‘congestion’ was regarded as the most serious problem in York, the most popular suggested action was ‘reducing congestion or introducing a congestion charge’ (mentioned by 7% of visitors). A further 6% suggested ‘restricting or banning delivery vehicles in the city centre’ and 3% suggested having ‘a vehicle free zone or vehicle classification limitation within the city walls’ and ‘making the outer ring road one way or dual lane’.

Improving public transport was another theme running across some responses, with 6% of visitors stating that ‘cheaper bus or Park and Ride fares’ would help to tackle perceived problems. A further 4% suggested that ‘information should be improved e.g. more printed timetables and digital screens’.

Figure 9: Suggestions for action in tackling serious transport problems

Q21. Do you have any suggestions for actions to tackle the most serious problems which you identified in the previous two questions?



Source: Qa Research 2019 Base: 272 (all visitors)

