



NTA Customer Satisfaction Research 2017

Presentation Summary Deck

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Project no. 41113921

Údarás
Náisiúnta Iompair
National Transport Authority

Background & Methodology

- We conducted surveys with users of public transport to assess their level of satisfaction with service provision at an overall level and across a range of key metrics. Following a pilot phase in April 2017 we have focused on asking customers about their experience of usage “in general” rather than a specific journey.
- Face to face interviews with people aged 16+. Respondents recruited at stops/stations located throughout the country as they are waiting to board or alighting public transport services – interviews conducted using HAPI tablets with pre-programmed survey script.
- A total sample of 2,516 customers were interviewed, consisting of the following:
 - Dublin Bus n=408
 - Luas n=301
 - Irish Rail InterCity and Commuter n=393
 - DART n=202
 - Bus Éireann n=925
 - Private coaches n=287
- Data for the all public transport operators has been weighted to reflect the number of passenger journeys. The total public transport results include data for all modes of transport, excluding private buses.
- Fieldwork was conducted from early October until mid November. No interviews for Irish Rail or DART were conducted during days of industrial action (1st and 7th November).



Key Research Findings

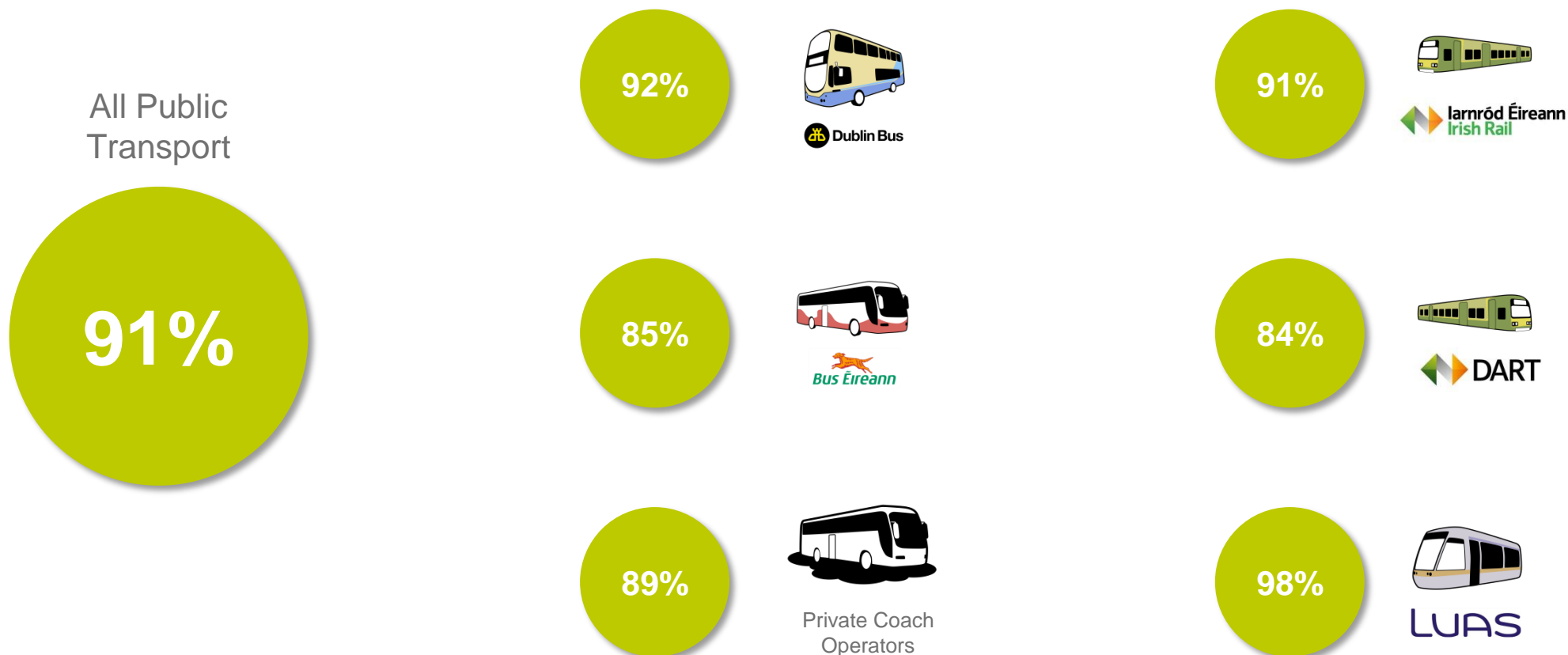


Summary Overall Customer Satisfaction by mode of transport:

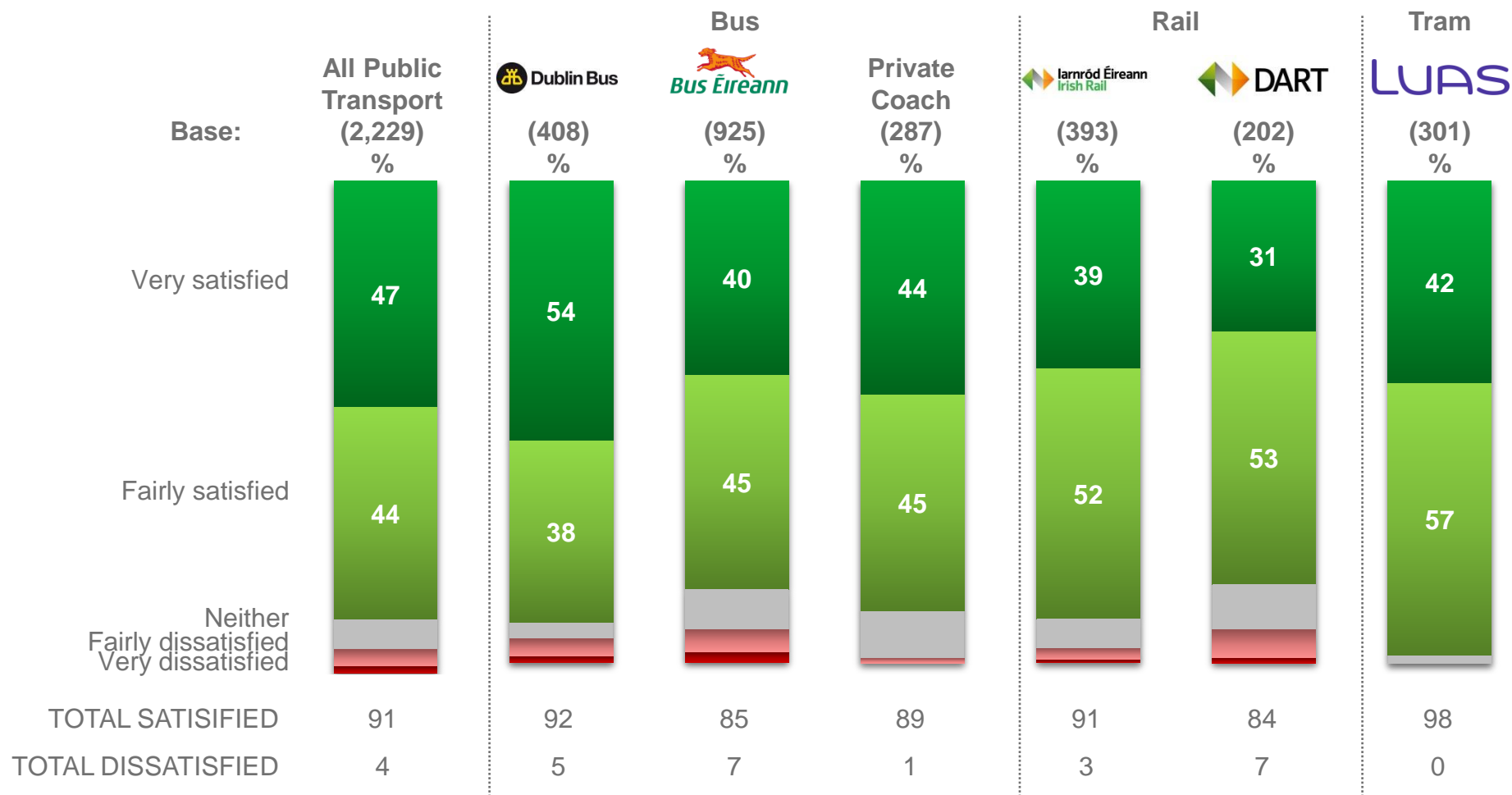
9 in 10 public transport users are satisfied with their service overall.

Customer satisfaction is highest for users of Luas and is lowest for Bus Éireann and DART

Base: All respondents



Overall Satisfaction by mode of transport, shows very low levels of dissatisfaction – only 4%



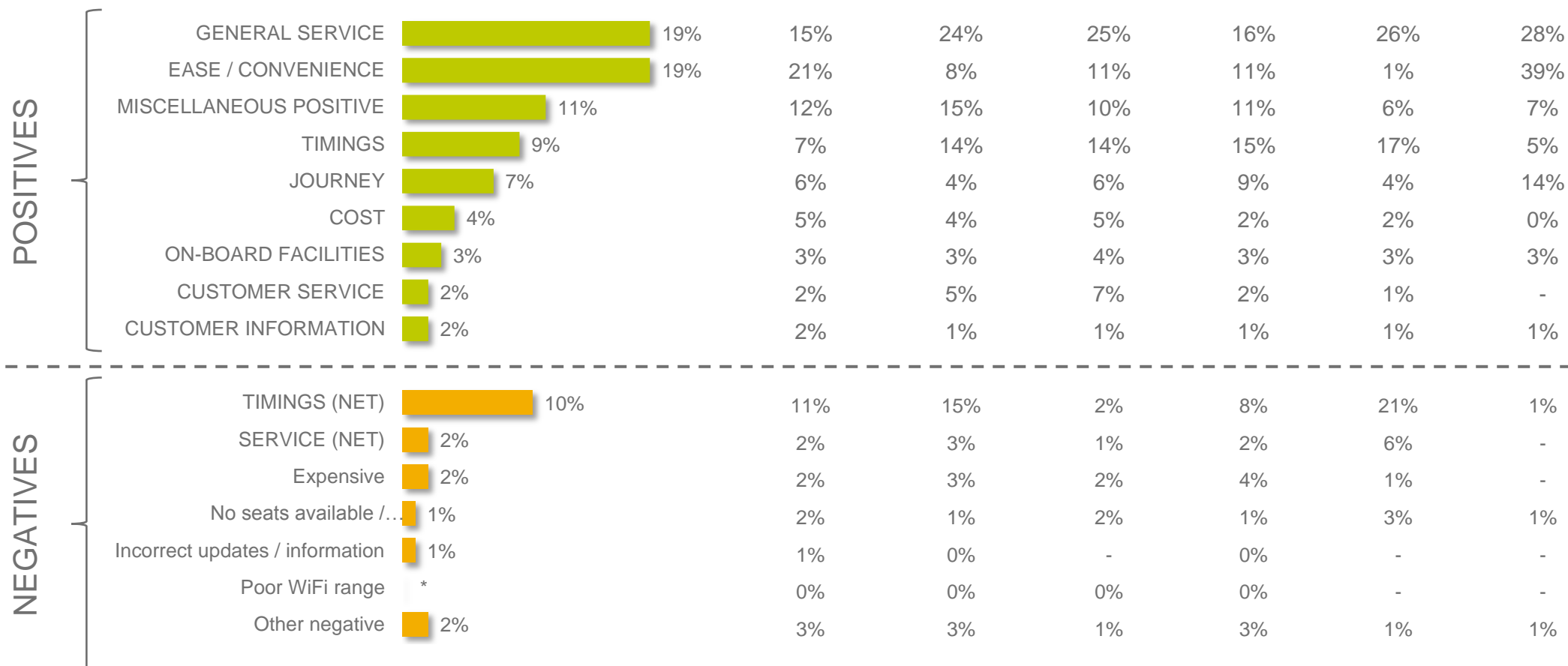
Reasons for satisfaction are focus on overall service and convenience whereas timing is the main source of dissatisfaction

Base: all respondents

All public transport



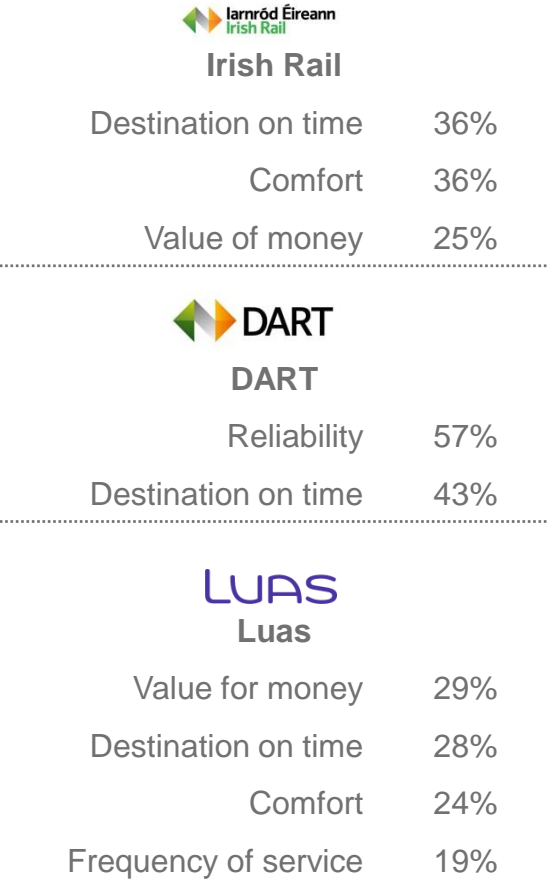
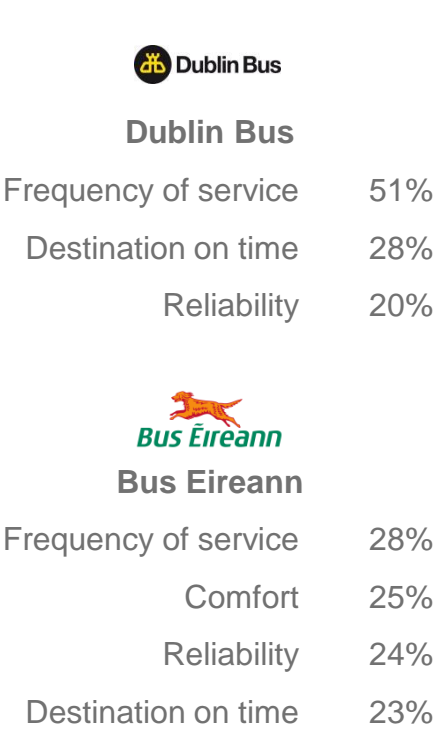
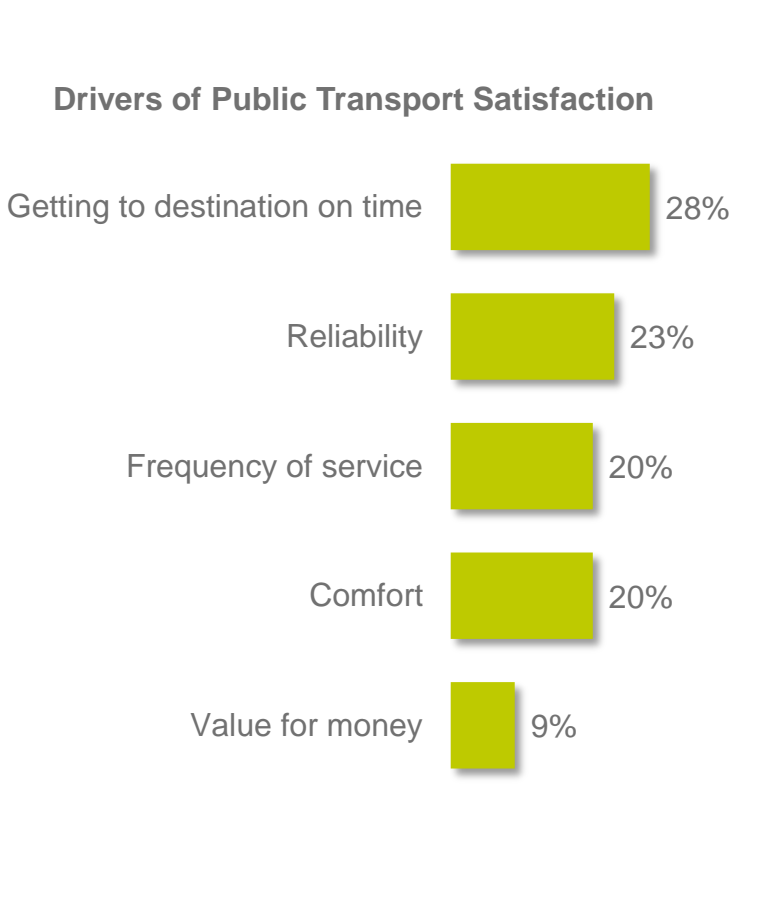
Private
coaches



*=less than 0.5%

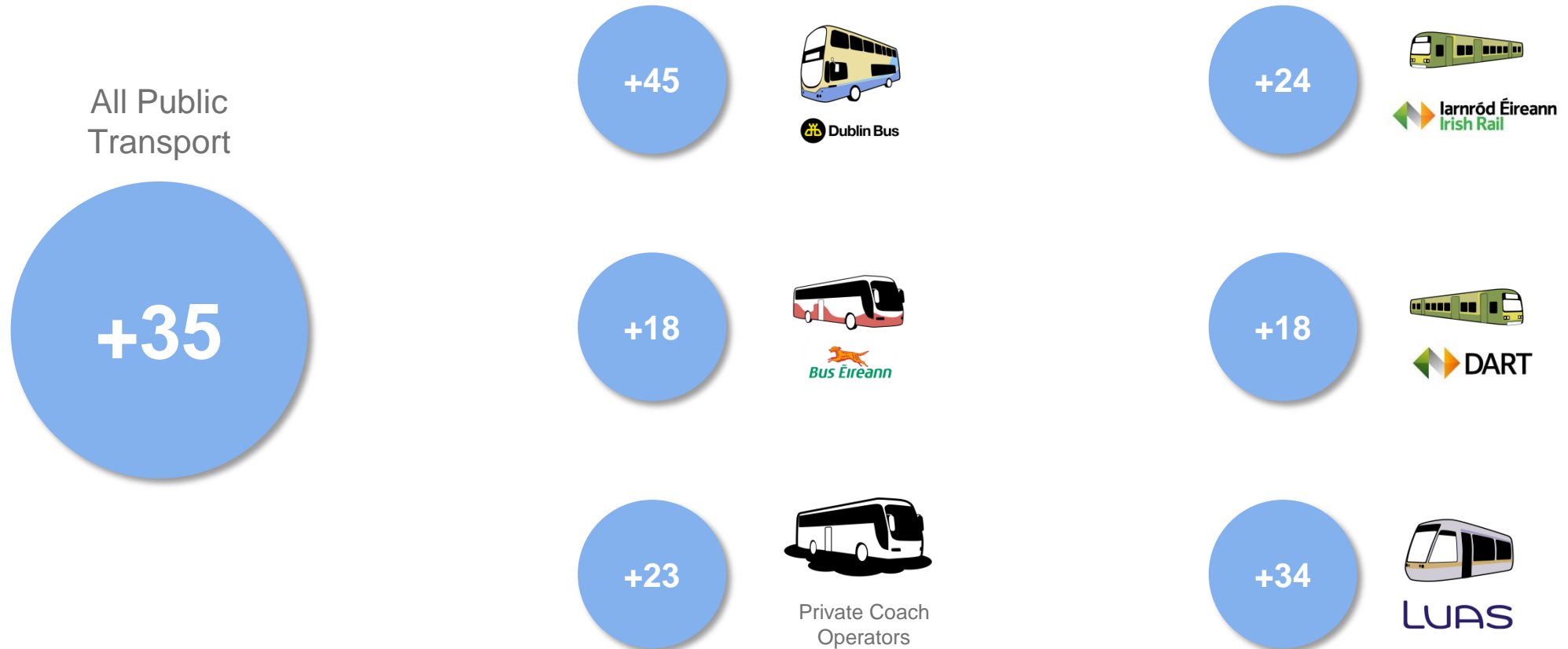
The strongest drivers of satisfaction overall is getting to the destination on time, although the results vary depending on service

Results of Regression Key Driver Analysis



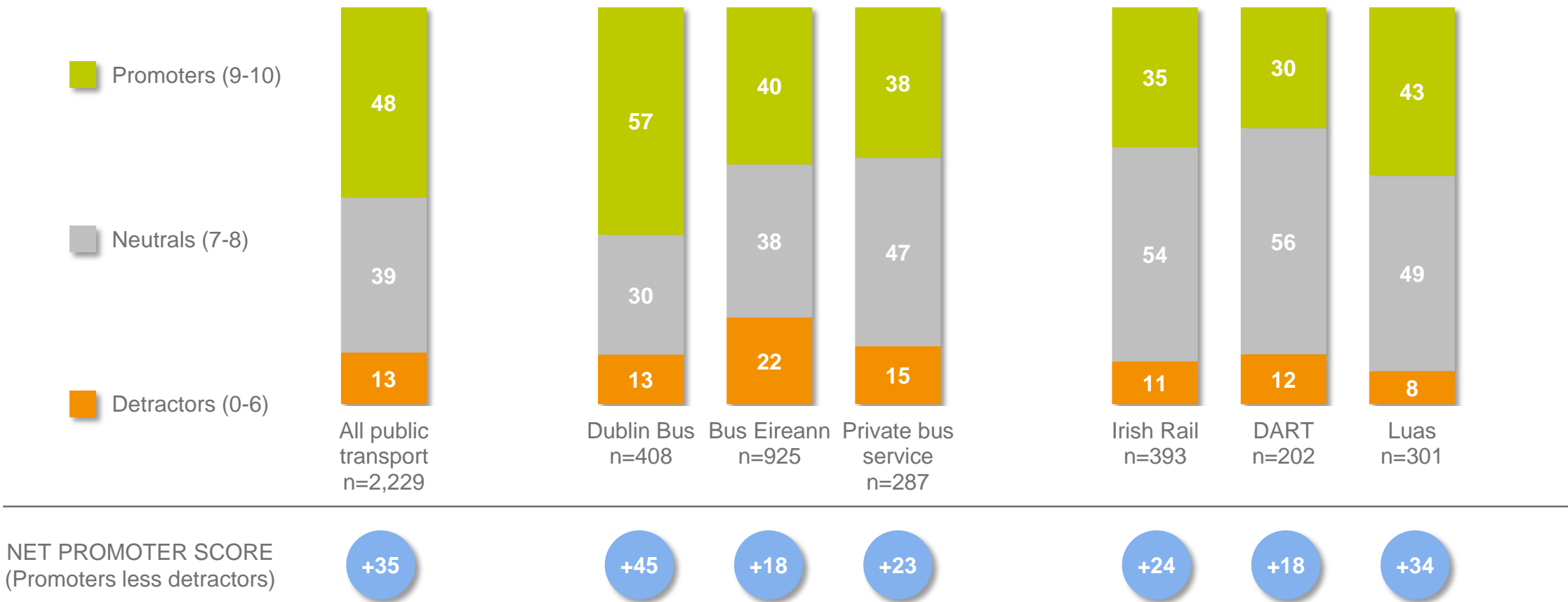
Summary Net Promoter Score (NPS) by mode of transport: highest for Dublin Bus and lowest for Bus Éireann and DART

Base: all respondents



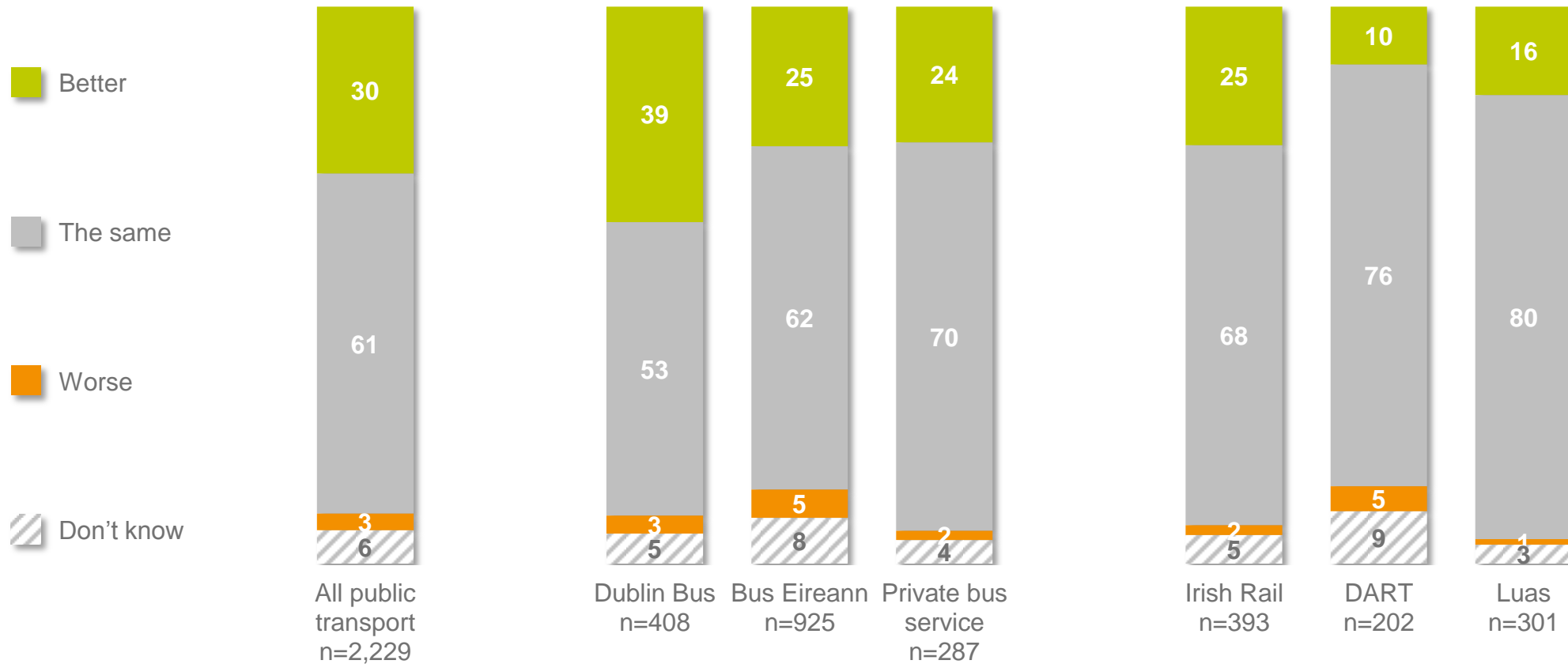
Net Promoter Score (NPS) by mode of transport: Dublin Bus has the highest level of promoters, and the lowest level of neutrals, detractors typically represent a minority of users

Base: all respondents







Perceptions of improvements to service: three in ten believe the service provided by public transport has improved over the past 12 months, only 3% feel it has got worse

Base: all respondents

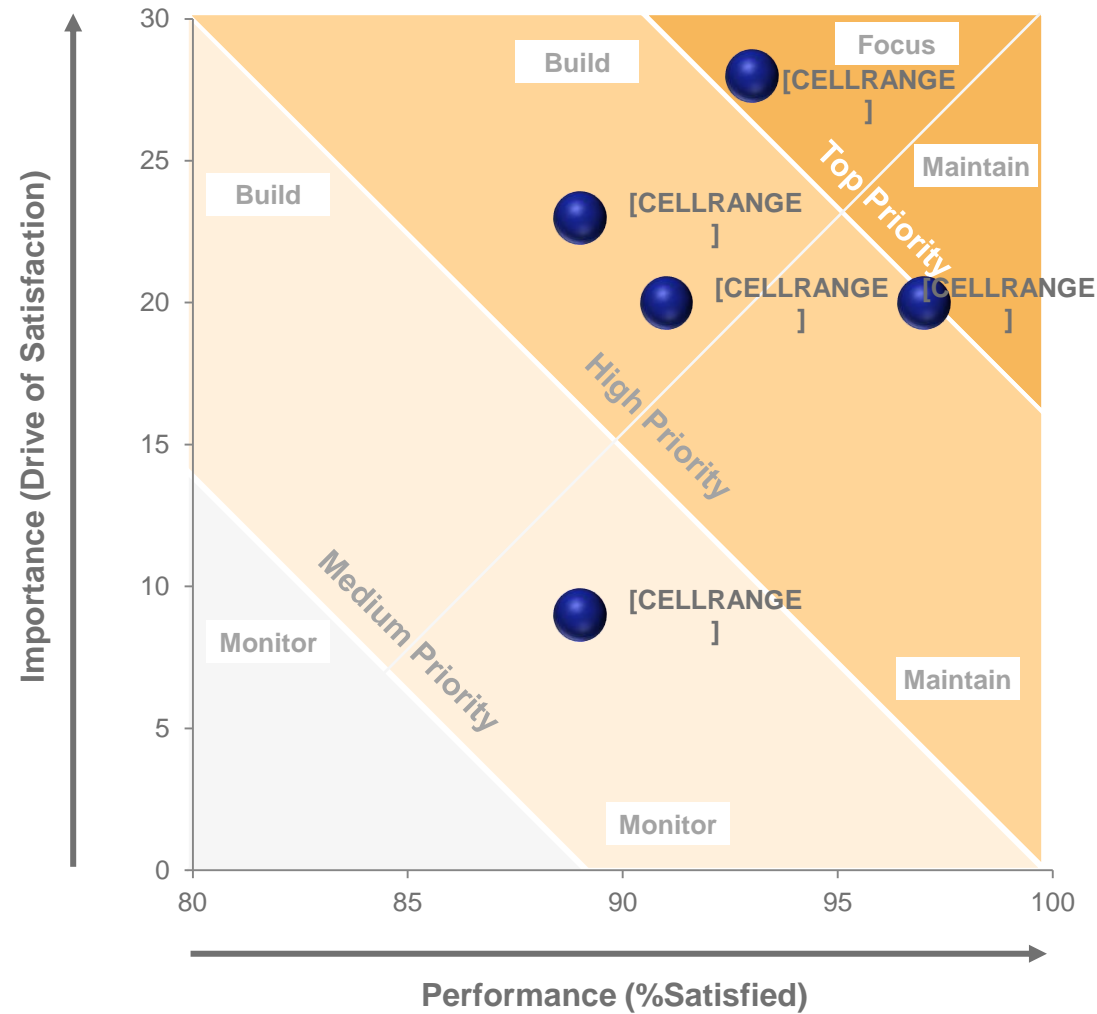


Summary of key satisfaction metrics by mode of transport, shows satisfaction with getting to destination on time higher for Luas, private coaches and Irish Rail

Base: all respondents






<i>% very/fairly satisfied</i>	All Public Transport n=2,229 %	 Dublin Bus n=408 %	 Bus Éireann n=925 %	Private Coaches n=287 %	 Iarnród Éireann Irish Rail n=393 %	 DART n=202 %	LUAS n=301 %
OVERALL SATISFACTION	91	92	85	89	91	84	98
Getting to destination on time (1)	93	93	86	97	96	86	100
Reliability of arriving on time (2)	89	89	84	93	95	77	99
Frequency of service (3)	91	92	89	94	89	80	99
Comfort (4)	97	99	93	92	97	90	99
Value for money* (5)	89	90	83	93	81	82	98

Performance/Importance Matrix: Getting to their destination on time should be a main focus and top priority, with comfort an important priority to maintain



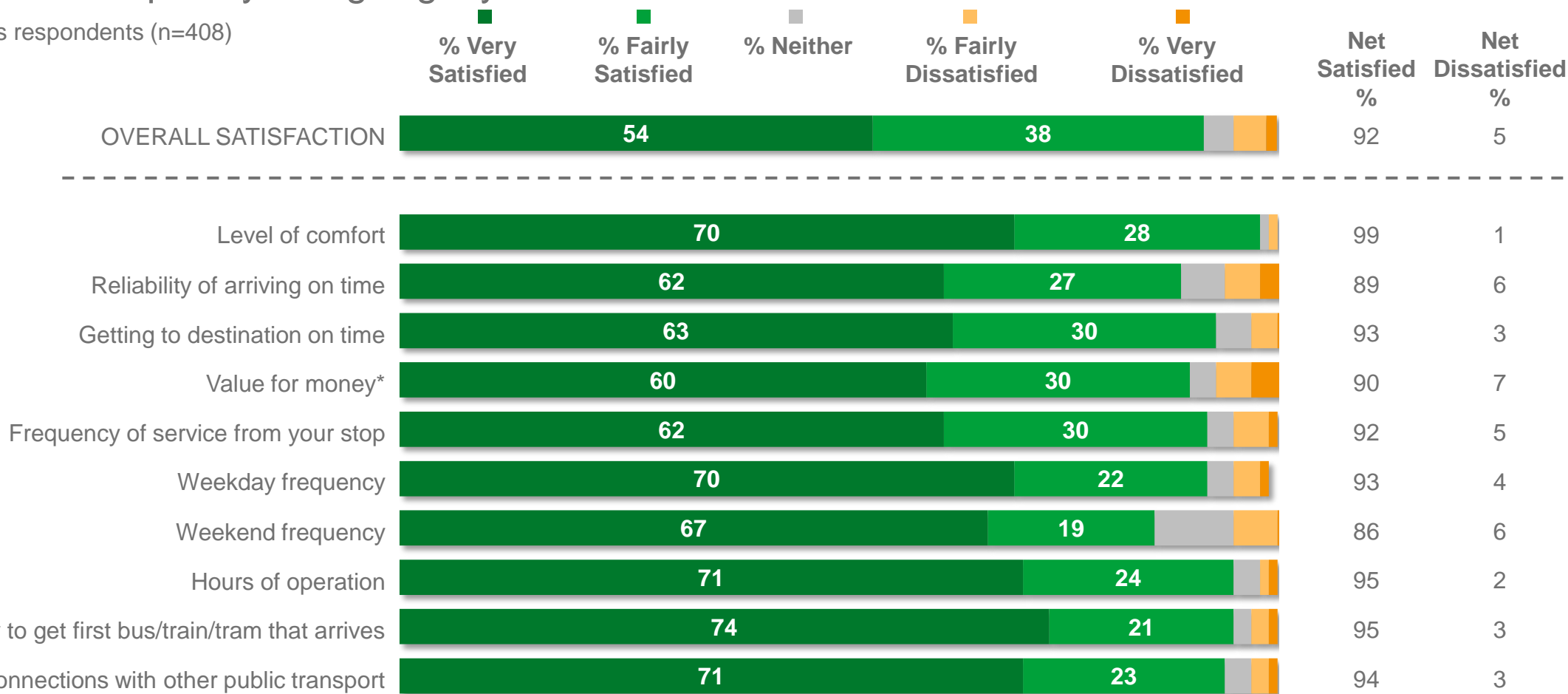
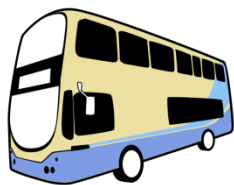
Summary of overall service metrics by mode of transport

Base: all respondents

<i>% very/fairly satisfied</i>	All Public Transport n=2,229 %	 Dublin Bus n=408 %	 Bus Éireann n=925 %	Private Coaches n=287 %	 Iarnród Éireann Irish Rail n=393 %	 DART n=202 %	 LUAS n=301 %
OVERALL SATISFACTION	91	92	85	89	91	84	98
Weekday frequency	91	93	84	86	89	81	94
Weekend frequency	82	86	78	81	70	64	90
Hours of operation	92	95	84	87	87	85	93
Ability to get first bus/train/tram that arrives	92	95	86	85	93	89	91
Ability to make connections with other public transport	88	94	79	84	82	76	87

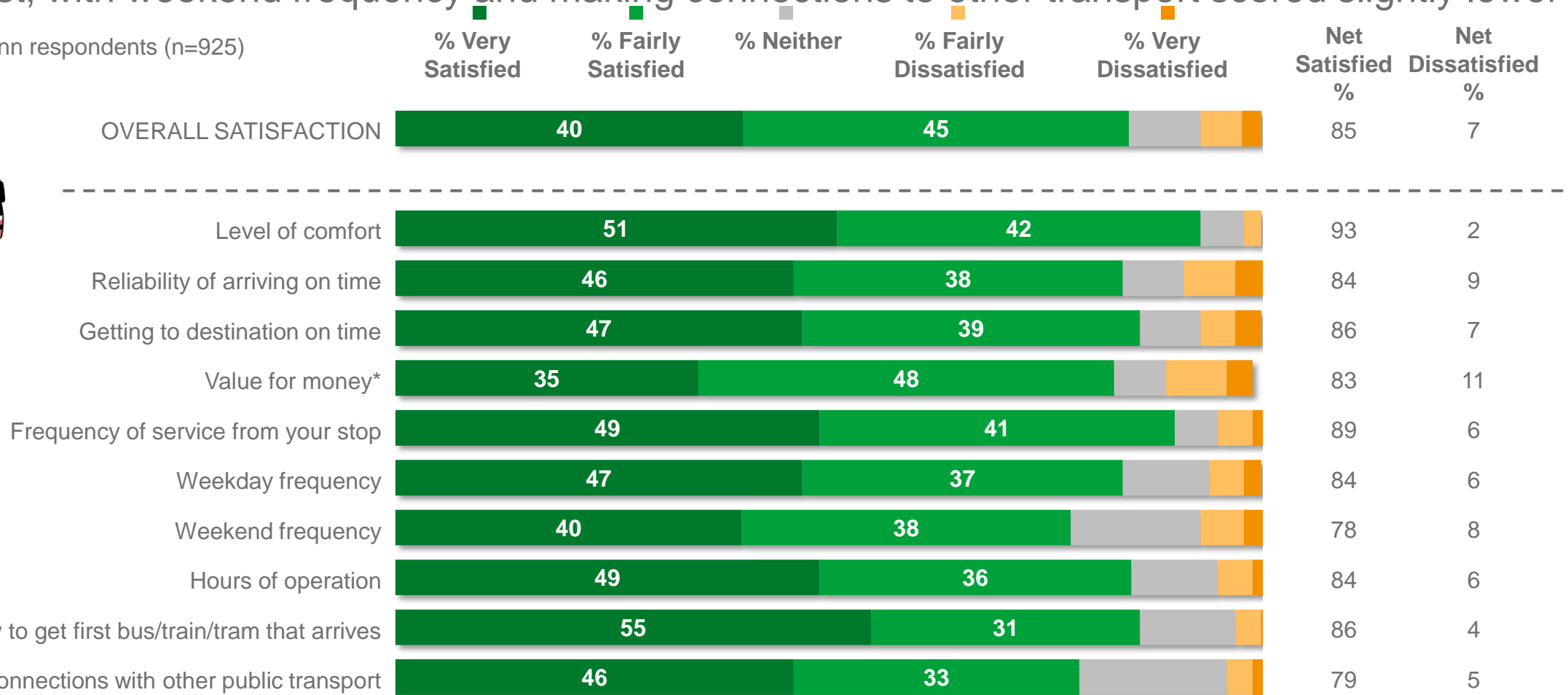
Key Satisfaction Metrics for Dublin Bus shows strong satisfaction levels (many 90%+) across the board, weekend frequency being slightly lower than other measures

Base: all Dublin Bus respondents (n=408)



Key Satisfaction Metrics for Bus Éireann, indicate satisfaction levels mainly in 80%s, with comfort the strongest, with weekend frequency and making connections to other transport scored slightly lower

Base: all Bus Éireann respondents (n=925)

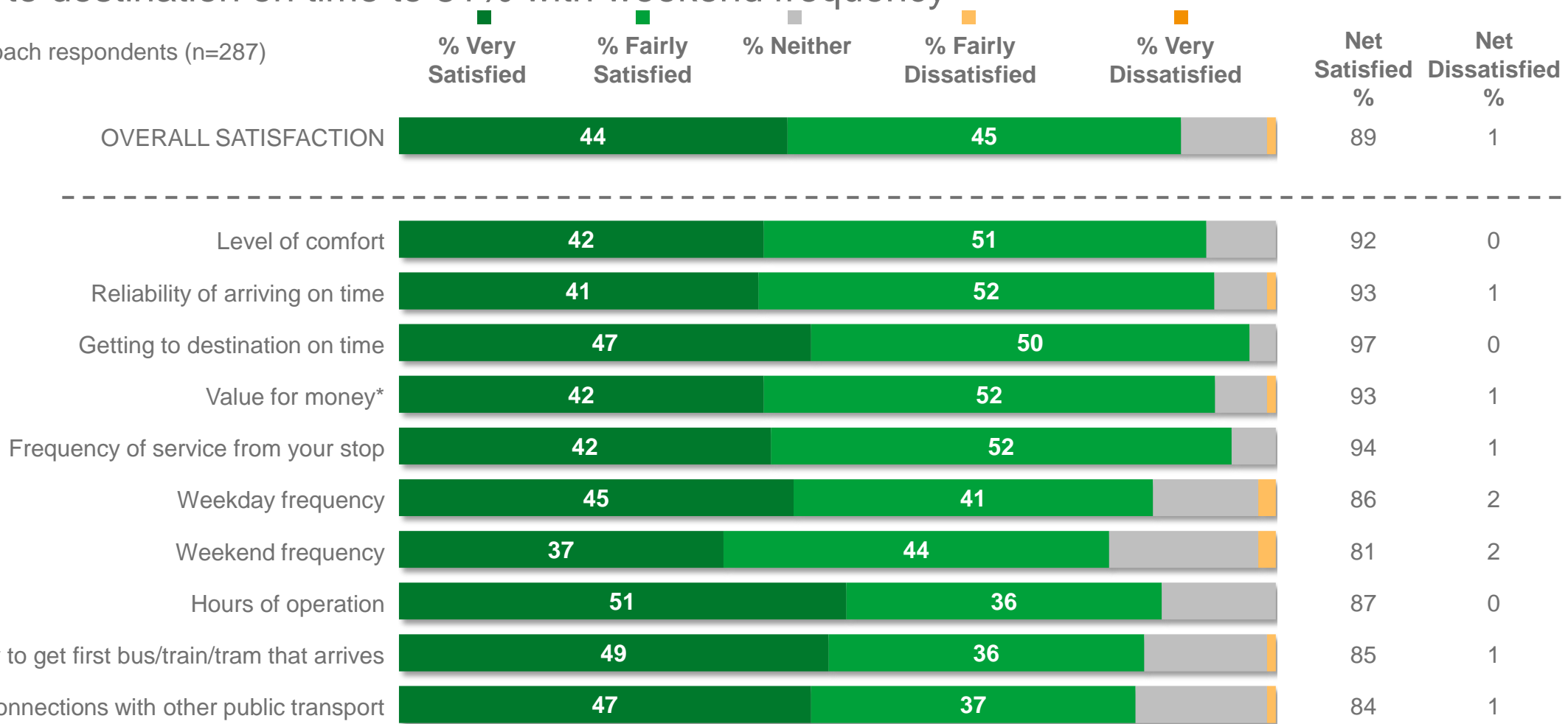


Key Satisfaction Metrics for Private Coach Operators, shows strong scoring from 97% satisfaction with getting to destination on time to 81% with weekend frequency

Base: all Private Coach respondents (n=287)



Private Coach Operators



Key Satisfaction Metrics for Irish Rail, shows high levels of satisfaction with comfort (97%) but less satisfaction with weekend frequency (70%)

Base: all Irish Rail InterCity and Commuter respondents (n=393)



■ % Very Satisfied
 ■ % Fairly Satisfied
 ■ % Neither
 ■ % Fairly Dissatisfied
 ■ % Very Dissatisfied
 Net Satisfied % Net Dissatisfied %

OVERALL SATISFACTION



Net Satisfied %: 91 Net Dissatisfied %: 3

Level of comfort



Net Satisfied %: 97 Net Dissatisfied %: 1

Reliability of arriving on time



Net Satisfied %: 95 Net Dissatisfied %: 2

Getting to destination on time



Net Satisfied %: 96 Net Dissatisfied %: 1

Value for money*



Net Satisfied %: 81 Net Dissatisfied %: 11

Frequency of service from your stop



Net Satisfied %: 89 Net Dissatisfied %: 6

Weekday frequency



Net Satisfied %: 89 Net Dissatisfied %: 3

Weekend frequency



Net Satisfied %: 70 Net Dissatisfied %: 9

Hours of operation



Net Satisfied %: 87 Net Dissatisfied %: 6

Ability to get first bus/train/tram that arrives



Net Satisfied %: 93 Net Dissatisfied %: 2

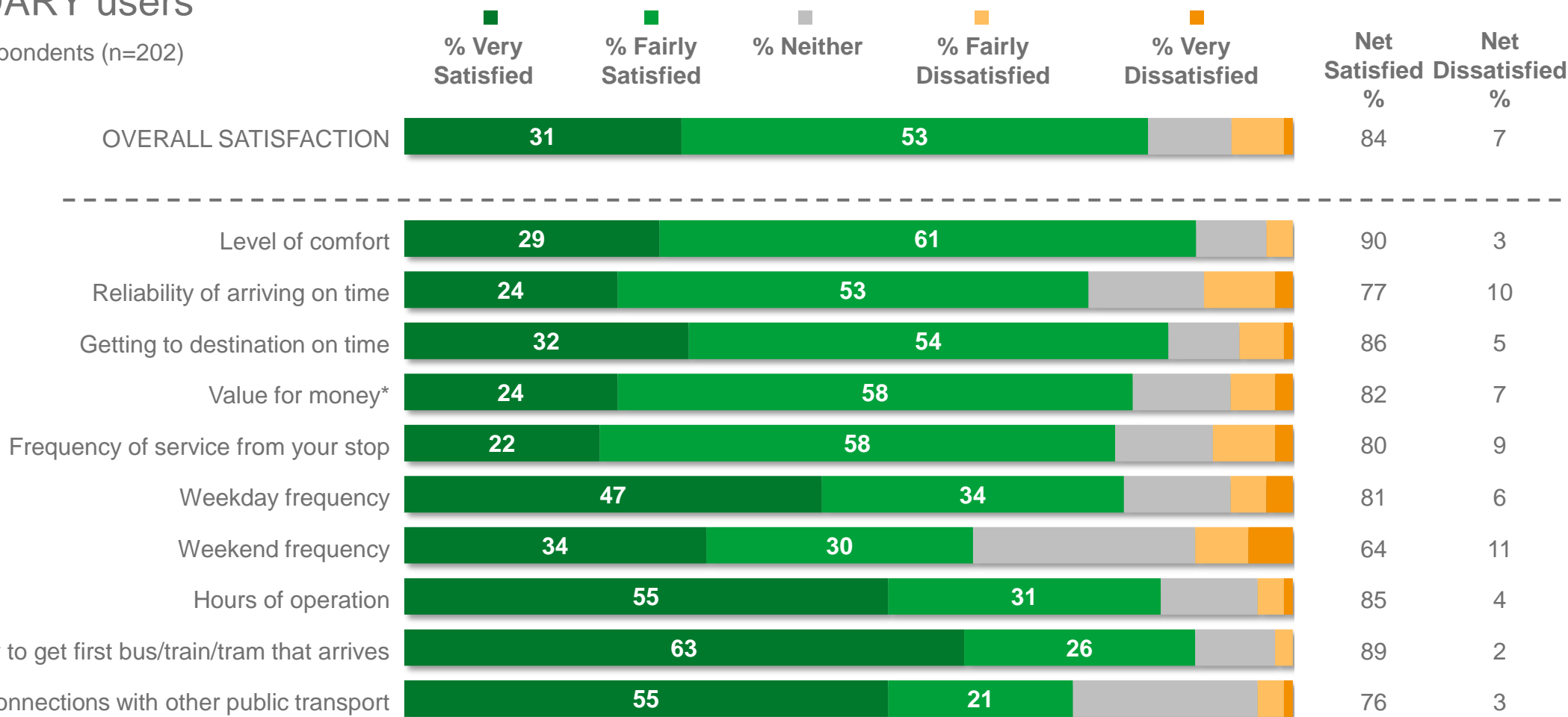
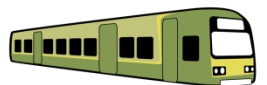
Ability to make connections with other public transport



Net Satisfied %: 82 Net Dissatisfied %: 4

Key Satisfaction Metrics for DART shows many key metrics only rated very satisfied among a quarter of DARTY users

Base: all DART respondents (n=202)

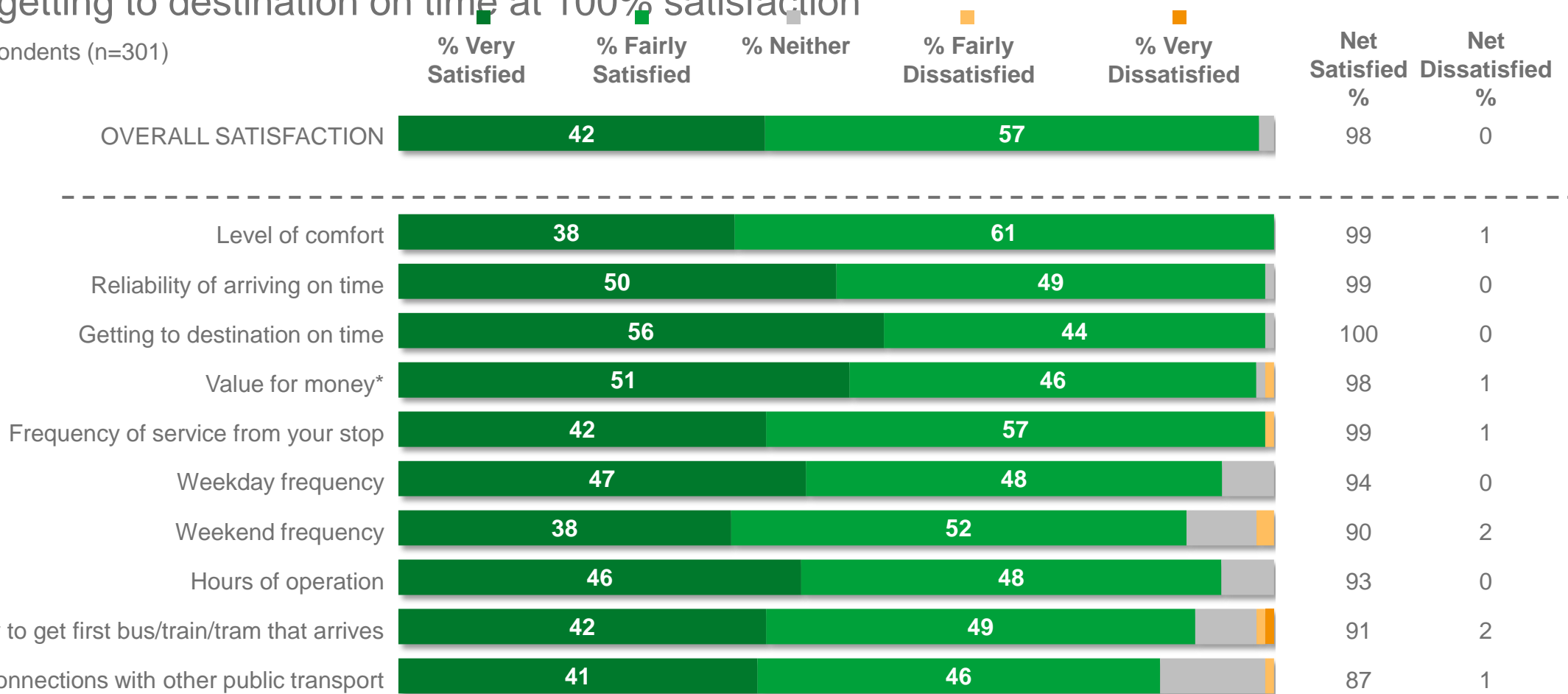


Key Satisfaction Metrics for Luas show very positive feedback across the measures with virtually all 90%+ and getting to destination on time at 100% satisfaction

Base: all Luas respondents (n=301)



LUAS



Satisfaction at the stop/station is strong among Dublin Bus users and also Luas travellers. Irish Rail and DART not strong for car parking or bike storage at stations

% very/fairly satisfied

Base: all respondents

	All Public Transport	Dublin Bus	Bus Éireann	Private bus service	Irish Rail	DART	Luas
ALL MODES							
Condition of stop/shelter/platform	94	98	83	83	90	89	94
Cleanliness of stop/shelter/station	93	97	85	84	89	85	92
Presence of graffiti	93	98	84	84	84	92	90
Crowding at stop / platform	89	94	85	79	88	78	86
Lighting	89	92	80	79	87	90	89
Personal safety	94	98	87	82	91	90	93
RTI sign*	92	94	88	92	91	91	86
BUS / TRAIN							
Information panel*	90	99	80	80	91	88	n.a.
Shelter provides sufficient cover during periods of bad weather*	92	95	88	91	89	85	n.a.
BUS							
Timetable info provided	n.a.	95	85	n.a.	n.a.	n.a.	n.a.
Seats at the stop*	n.a.	95	90	88	n.a.	n.a.	n.a.
TRAIN							
Range of facilities at train station	n.a.	n.a.	n.a.	n.a.	79	77	n.a.
Car parking facilities at/near train station	n.a.	n.a.	n.a.	n.a.	64	64	n.a.
Bicycle storage facilities at train station	n.a.	n.a.	n.a.	n.a.	64	59	n.a.
Bus interchange at train station	n.a.	n.a.	n.a.	n.a.	73	74	n.a.
LUAS							
Ticket machine	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	87

Satisfaction with your regular journey shows Dublin Bus users generally satisfied, along with Luas users, with DART users having issues with crowding and availability of seats

Base: all respondents

	% very/fairly satisfied	All public transport n=2,229	Dublin Bus n=408	Bus Éireann n=925	Private bus service n=287	Irish Rail n=393	DART n=202	Luas n=301
CLEANLINESS								
Cleanliness of the outside	94	94	97	89	82	86	85	94
General cleanliness inside	91	91	95	85	85	85	82	91
Visibility through the windows	93	93	97	87	85	90	91	90
GETTING ON/OFF								
Ease of getting on	93	93	97	88	83	89	87	90
Ease of getting off	94	94	98	88	84	93	86	91
SEATS/COMFORT								
Level of crowding inside	86	86	91	86	81	78	70	83
Availability of seats	88	88	93	86	82	78	72	90
Condition of the seats	93	93	98	87	83	86	83	90
ENVIRONMENTAL FACTORS								
Air quality inside	91	91	96	87	81	89	79	88
Temperature inside	93	93	97	87	83	86	87	90
Lighting inside	95	95	99	88	87	93	91	91
Noise of engine	93	93	96	87	84	90	88	91
PERSONAL SAFETY								
Personal safety during journey	95	95	98	90	84	92	89	90
COMFORT								
Safety of driving*	95	95	98	87	83	-	-	91
Smoothness of driving	92	92	96	88	84	90	88	88
CUSTOMER INFORMATION/SERVICE								
Route information on display outside	93	93	98	87	82	88	85	89
Customer information on display inside	93	93	99	83	81	88	85	89
Helpfulness of staff	91	91	96	83	84	82	77	90

Overview of Customer Satisfaction findings

- 9 in 10 are satisfied with overall public sector transport, customer satisfaction is highest for users of Luas and is lowest for Bus Éireann and DART (still above 4 in 5 satisfied).
- Reasons for satisfaction are overall service and convenience whereas timing is the main source of dissatisfaction. Only 4% are dissatisfied overall.
- Key drivers of Satisfaction overall (using regression analysis) is the guarantee of arriving at the destination on time, although the results vary depending on service.
- Three in ten believe the service provided by public transport has improved over the past 12 months, while just less than two-thirds believe it has stayed the same, minimal proportion feel it is worse (3%).
- Satisfaction with regular journey shows Dublin Bus users generally satisfied, along with Luas users, with DART users having issues with crowding and availability of seats.