



Customer Satisfaction 2021

On location survey

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RESEARCH
& INSIGHT





Evaluate customer satisfaction across all public transport types. Interviews undertaken on location



Sample

Sample is controlled to provide a robust sample size for each transport type, with weighting applied in line with annual journey figures for 2020 .

Sample for this year is slightly more weighted to those travelling 2-4 days a week compared with 2019 than those travelling every day (to be expected).



Sample profile

	Total	MOE @95% CL	Controlled Weights %
Bus Éireann	800	+/-3%	15
Dublin Bus	398	+/-5%	51
Go Ahead	199	+/-7%	8
City Direct	102	+/-10%	
Kilkenny Private Bus operator	202	+/-7%	n/a
Irish Rail	401	+/-5%	13
DART	200	+/-7%	
LUAS	210	+/-7%	14
Total	2,513	+/-2%	100



Fieldwork dates

20th September – 3rd November 2021
(2019 research undertaken in two phases in June/July and September).

Travel has shifted from everyday/weekdays pre COVID-19 to be less frequent use in 2021

Frequency of travel:

	Bus		Train		LUAS	
	2019	2021	2019	2021	2019	2021
Base :	3,374	1,701	1,096	601	545	210
	%	%	%	%	%	%
Every day/weekdays	50	42	32	29	55	50
2-4 days a week	30	41	22	30	18	29
Once a week	11	11	15	13	9	10
Once a month	6	4	17	15	9	8
Once every 2-3 months	2	2	9	10	4	1
Once every 4-6 months	1	1	5	3	2	1
Less frequently	-	-	-	-	1	-
Weekly	91	94	69	72	82	89



1. Overall Satisfaction levels with public transport

Satisfaction levels with Public Transport remain high across modes, even increasing for Train

Overall satisfaction:

All transport



86%
(87%)

Bus



84%
(85%)

LUAS



91%
(93%)

Train



94%
(89%)

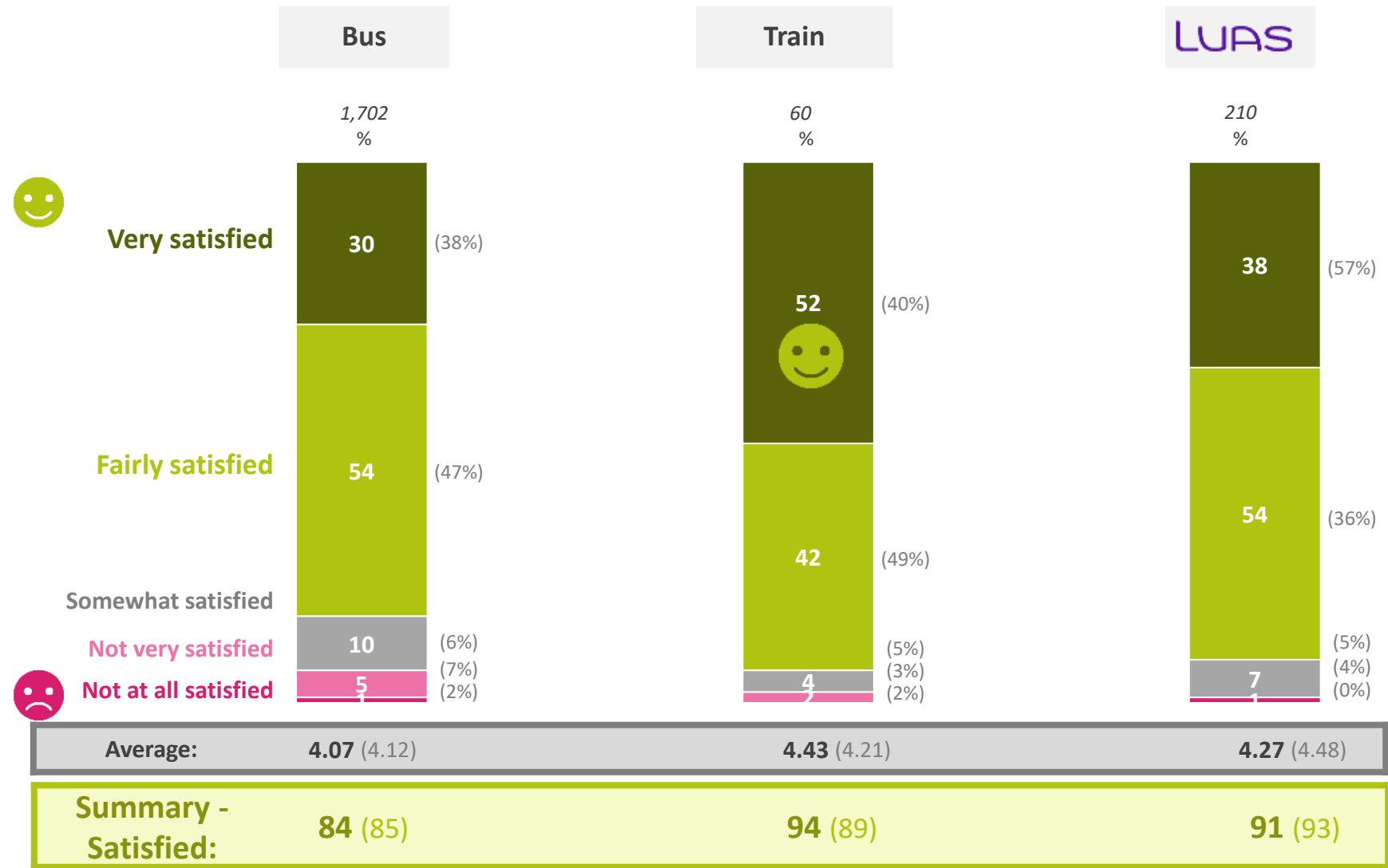
() = 2019

Overall satisfaction for Bus and Luas remains high however the strength of positivity has softened for these modes

Base: All public transport customers - 2,513



Overall satisfaction by mode:

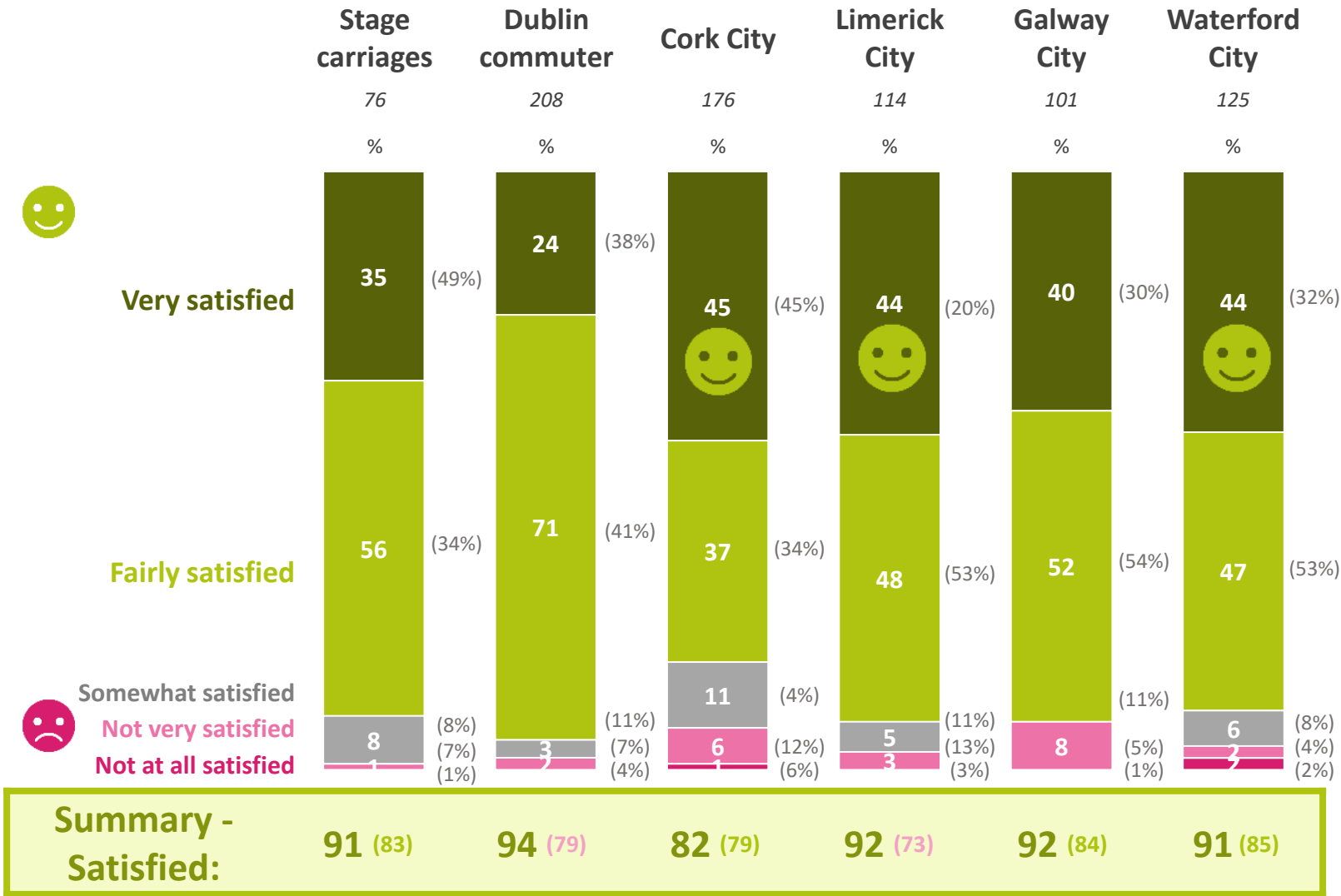


Overall satisfaction increases across bus regions however top box intensity is down, with the exception of Cork city



Base: All regional bus customers – 800

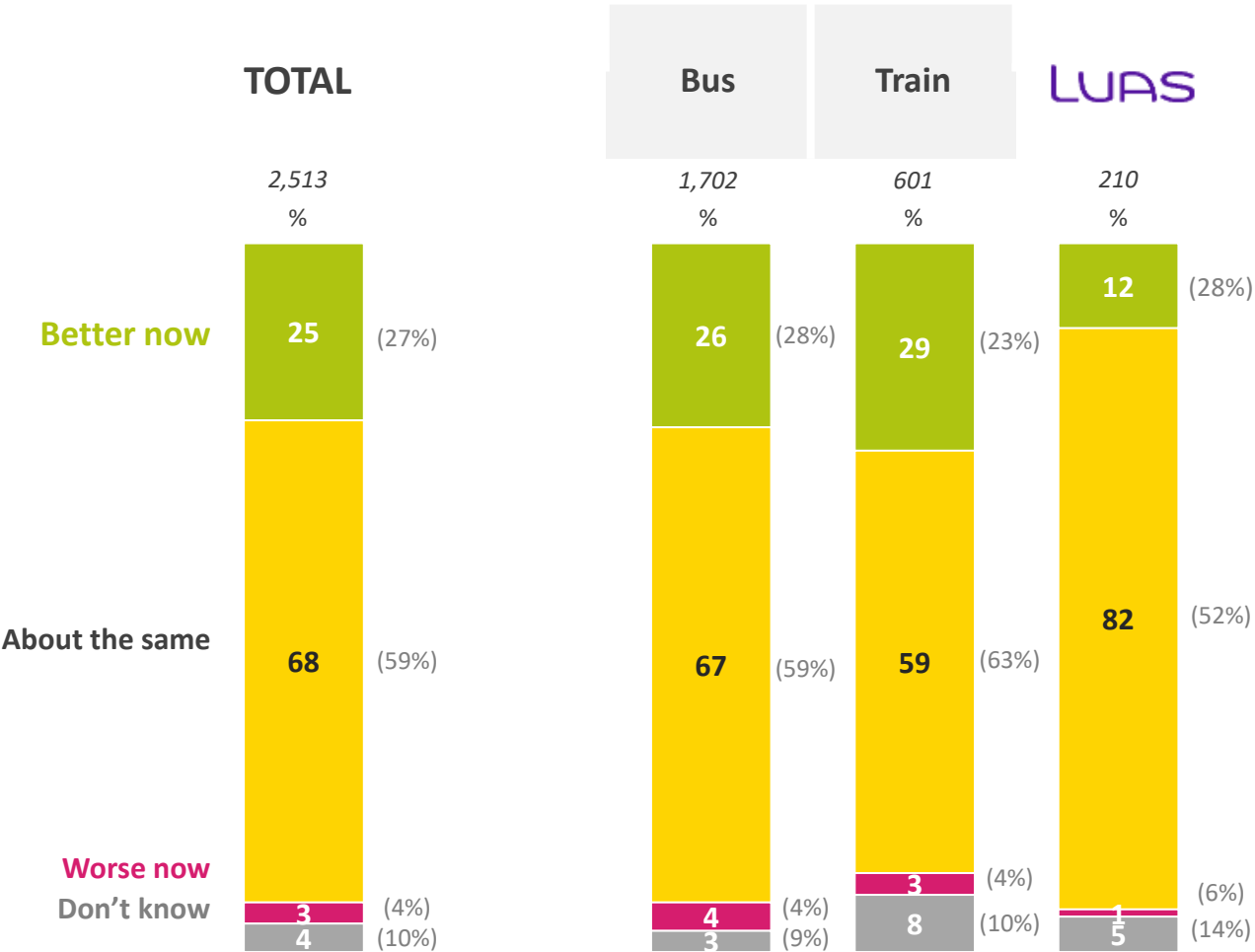
Overall satisfaction by region:



1 in 4 perceive transport services as improving, perceptions are least positive for Luas

Base: All public transport customers - 2,513

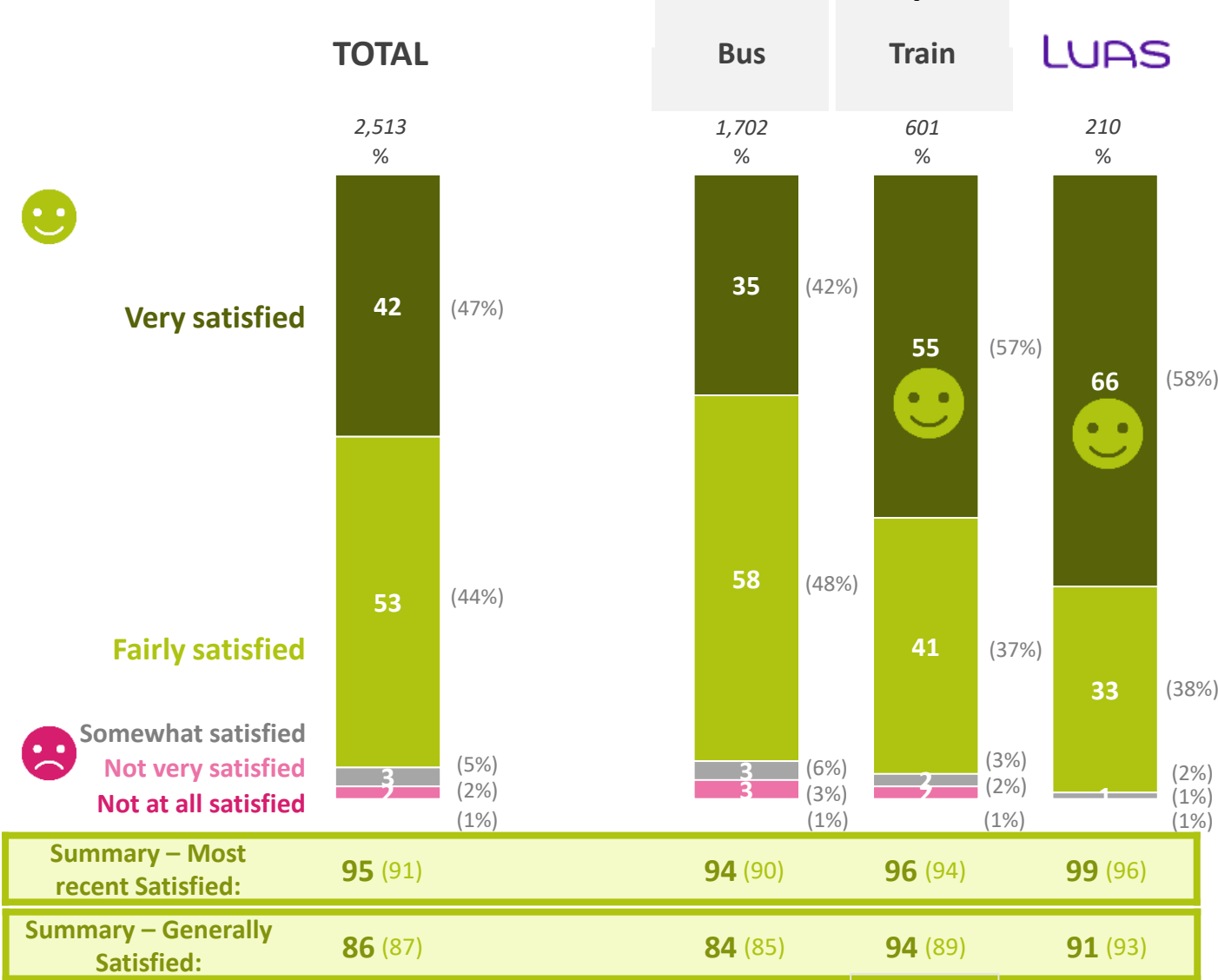
Opinion of service vs 12 months ago:



Satisfaction with most recent trip is also high with intensity being maintained from 2019 for Train and increasing for Luas

Base: All public transport customers – 2,513

Satisfaction with most recent trip:

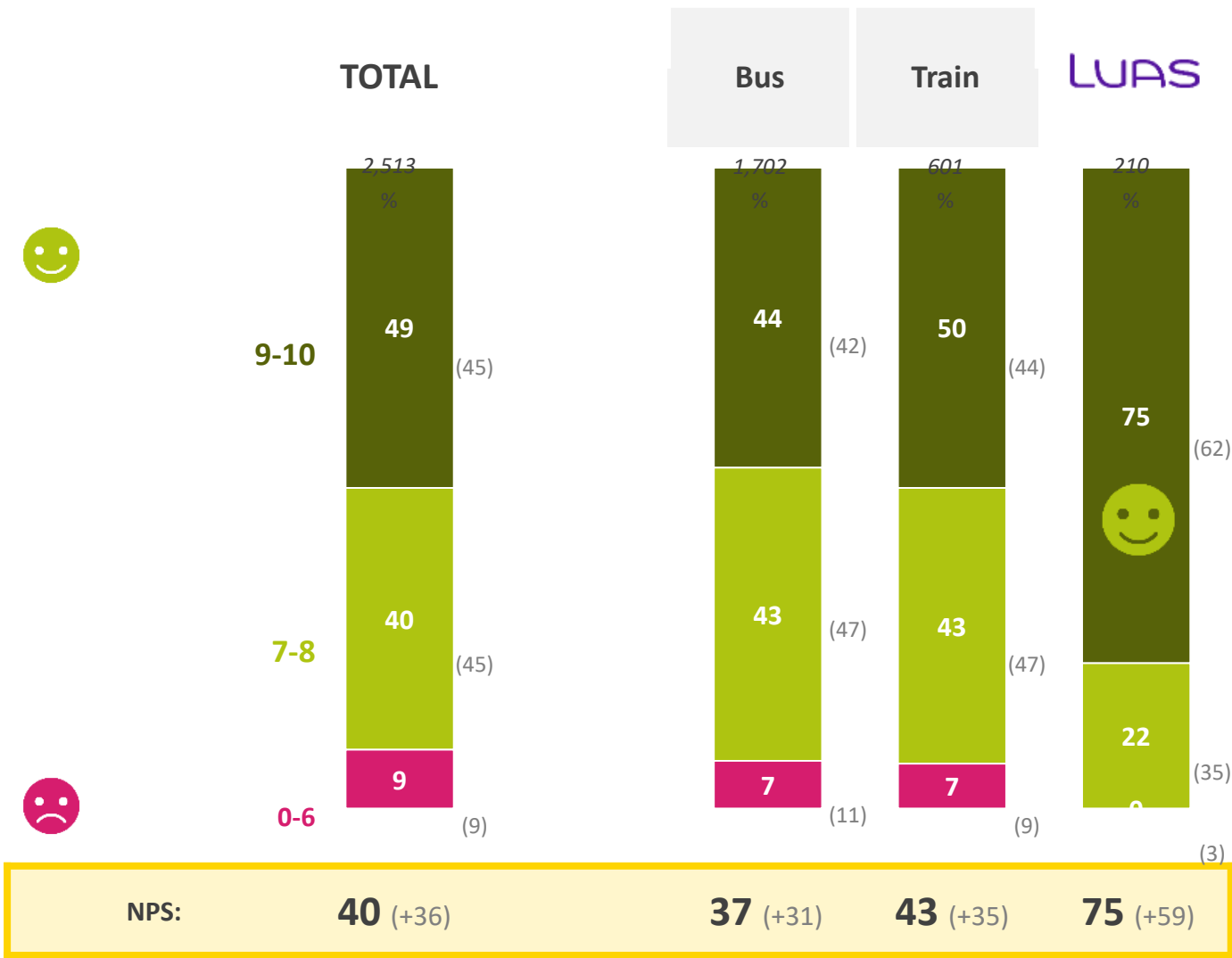


NPS increases across modes with Luas preforming strongest due to high Promoters



Base: All public transport customers – 2,513

NPS:





2. A deep dive into overall satisfaction levels

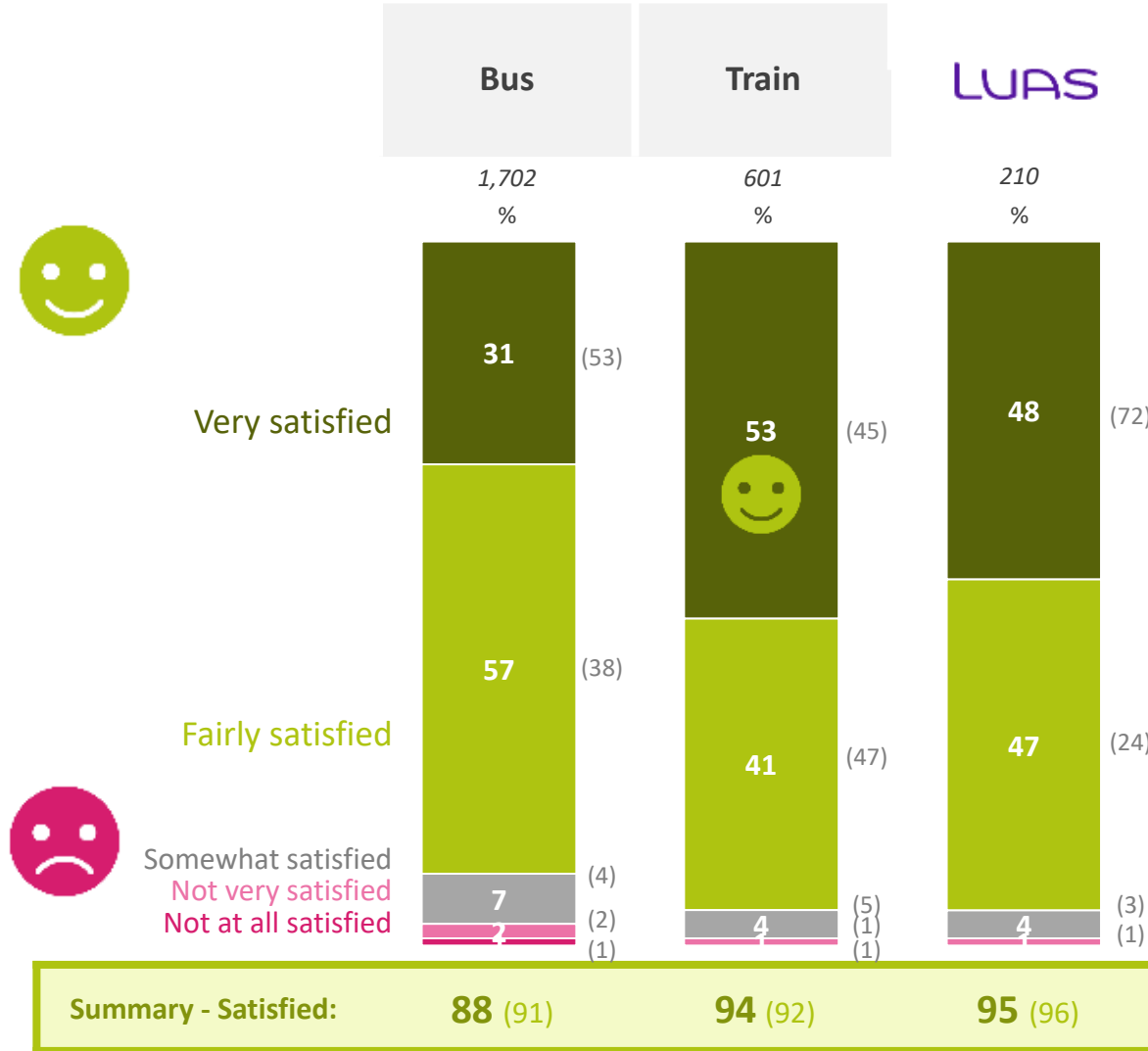


2.1 How are the various modes performing with regard to on-boarding the service?

Overall satisfaction is high with the condition of the stops/platforms, especially for Luas and Train

Base: All public transport customers - 2,513

Condition at stops/platform:



Higher levels of satisfaction evident with timetable information for Train compared to Bus

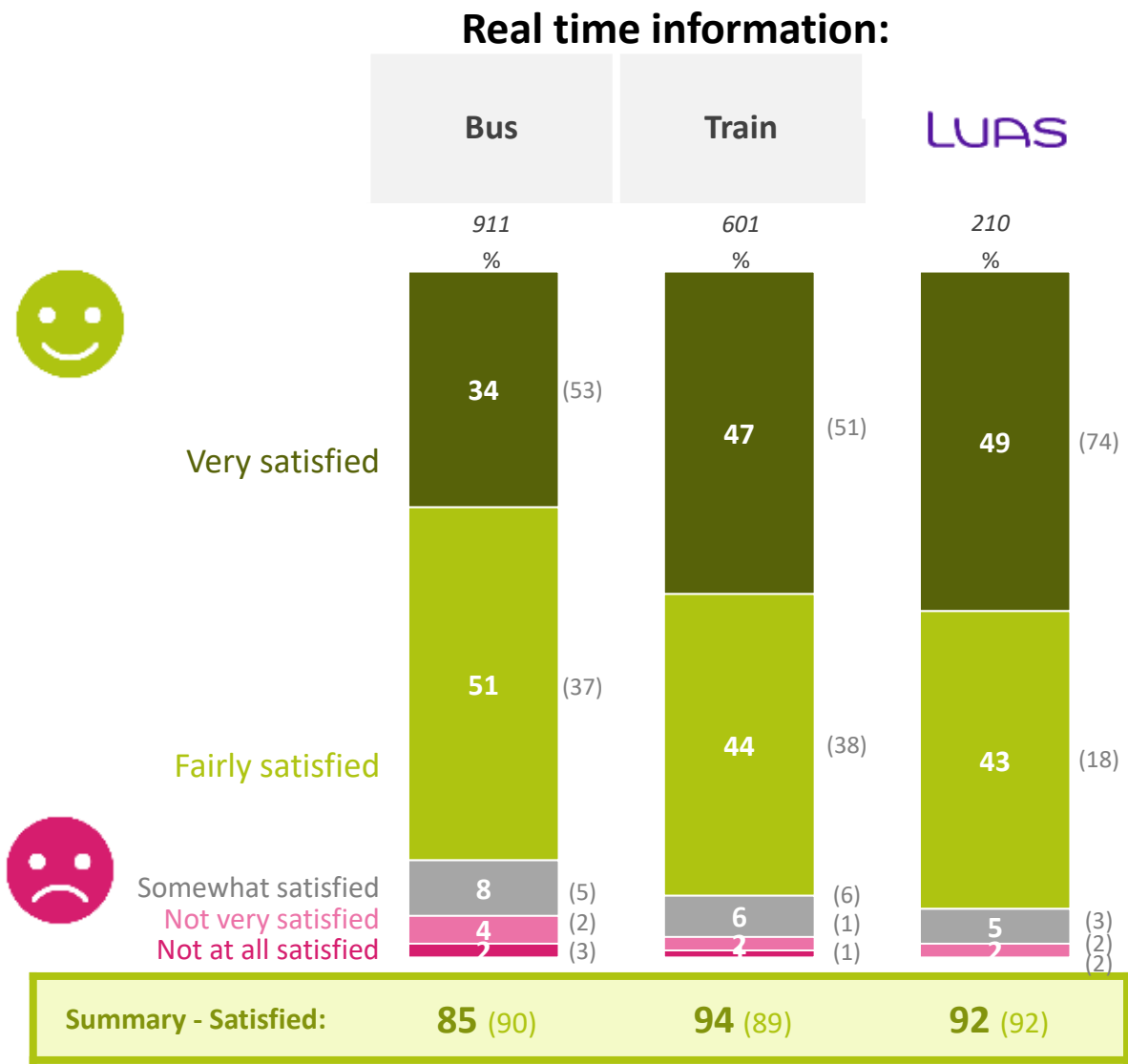
Base: All public transport customers whose stop has a timetable/information panel - 1,250

Timetable information:



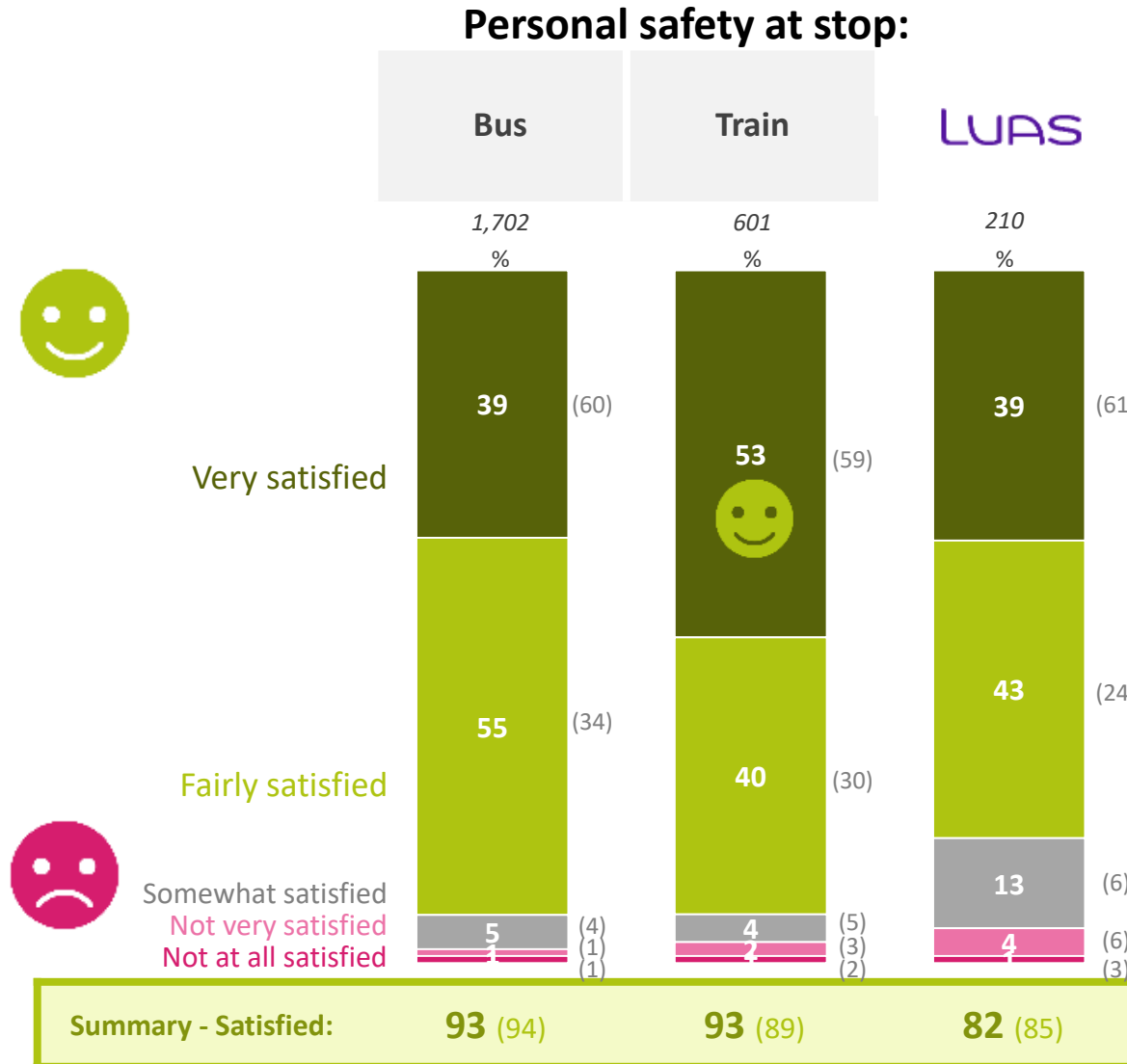
Luas and Train are rated more highly than Bus on real time information

Base: All public transport customers whose stop has real time information – 1,722



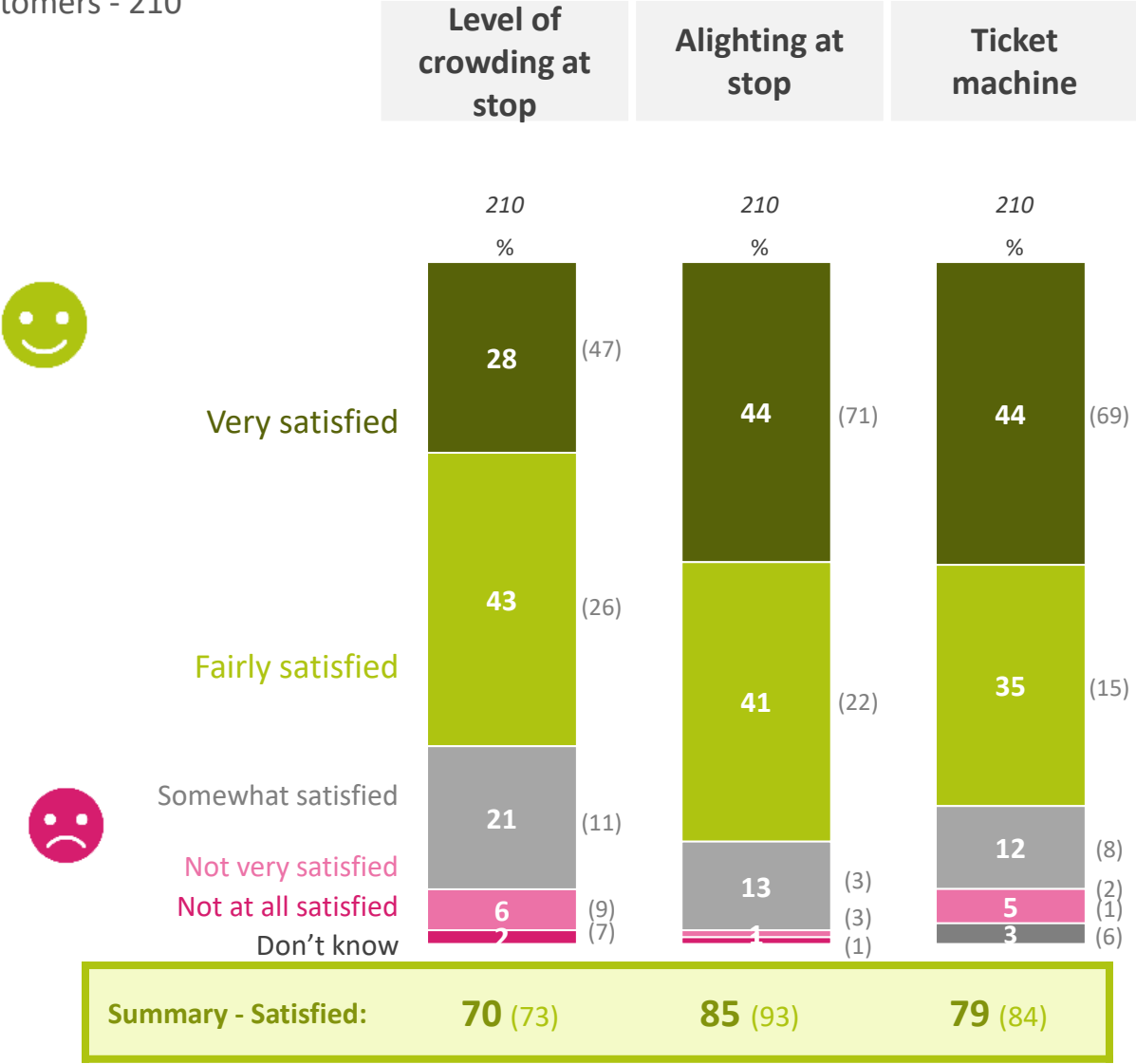
High satisfaction ratings with safety at stop overall, Bus and Train customers being slightly more satisfied compared to Luas users

Base: All public transport customers - 2,513



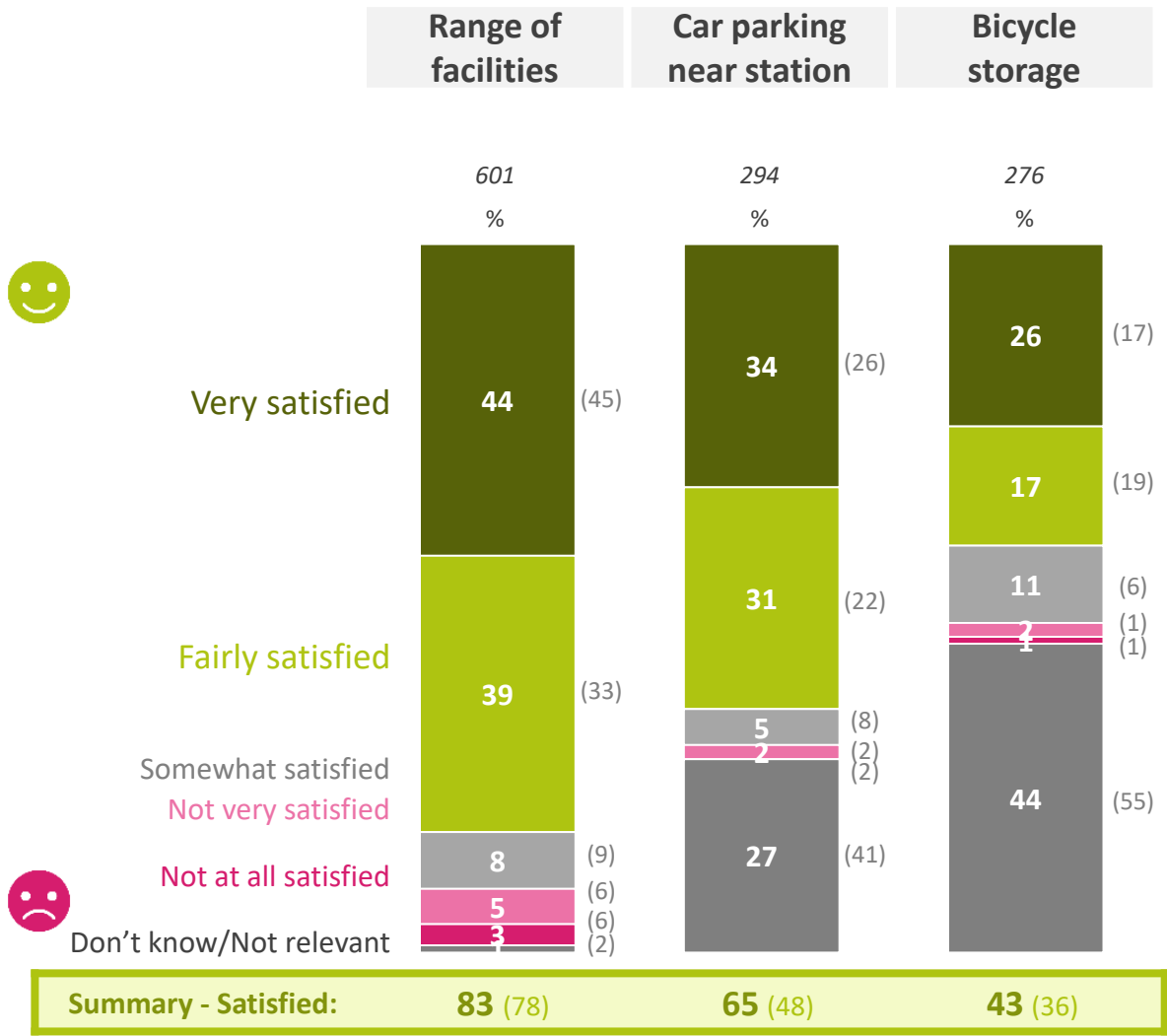
Satisfaction with crowding, alighting at stop and ticket machine has decreased overall and in intensity for Luas. Crowding at the stop is more of an issue for Luas than other modes

Base: All Luas customers - 210



For rail users overall satisfaction with range of facilities, parking and bicycle storage has increased since 2019

Base: All rail customers with services available



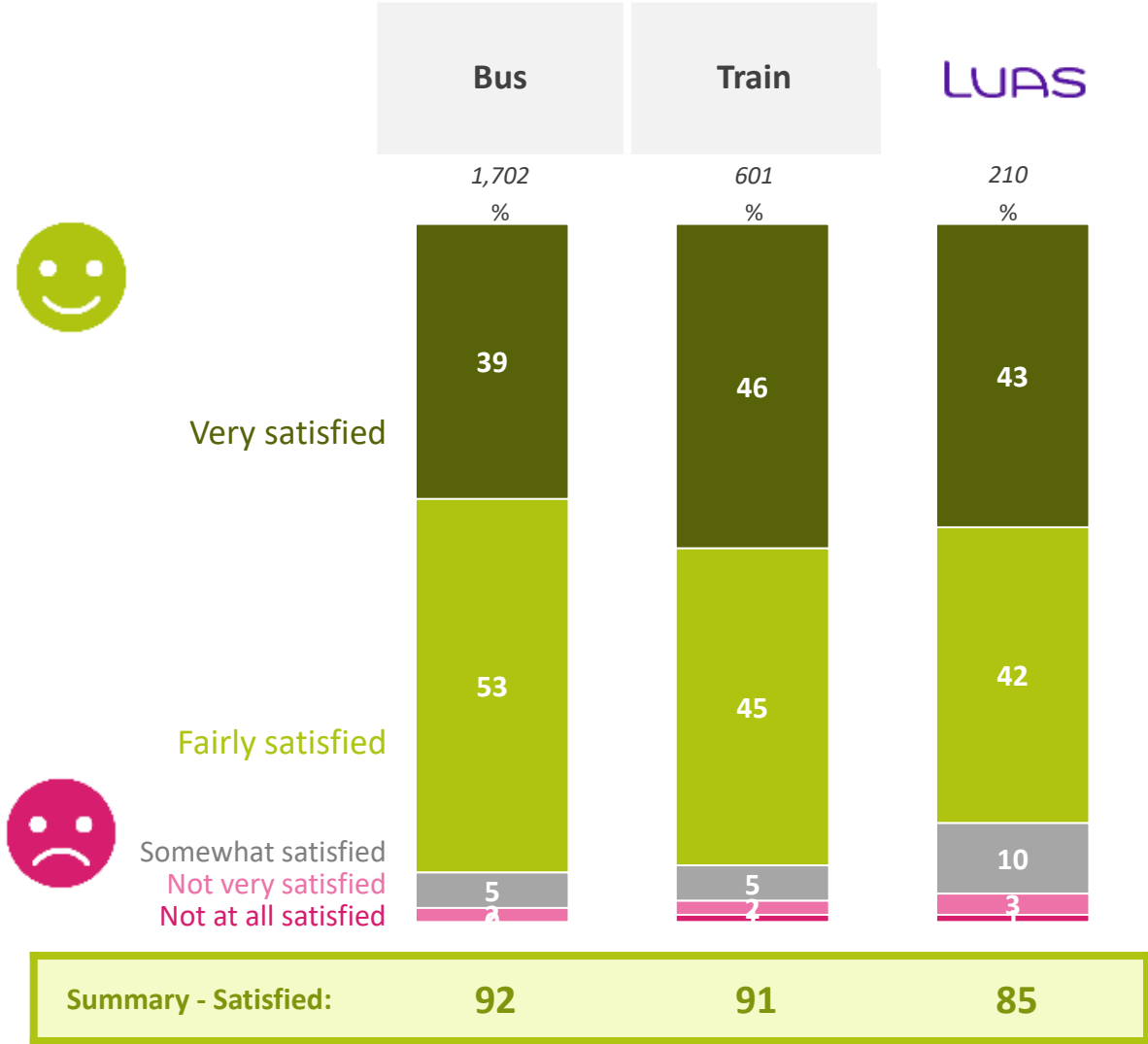
Q.4B Thinking about the STOP where you normally catch your ..., how satisfied or dissatisfied are you with... car parking facilities provided at or near the station/bicycle storage facilities provided at the station/ range of facilities provided at the station

While satisfaction is high with safety walking to the stop across modes, Luas scores lowest



Base: All public transport customers - 2,513

Personal safety walking to and from the stop:

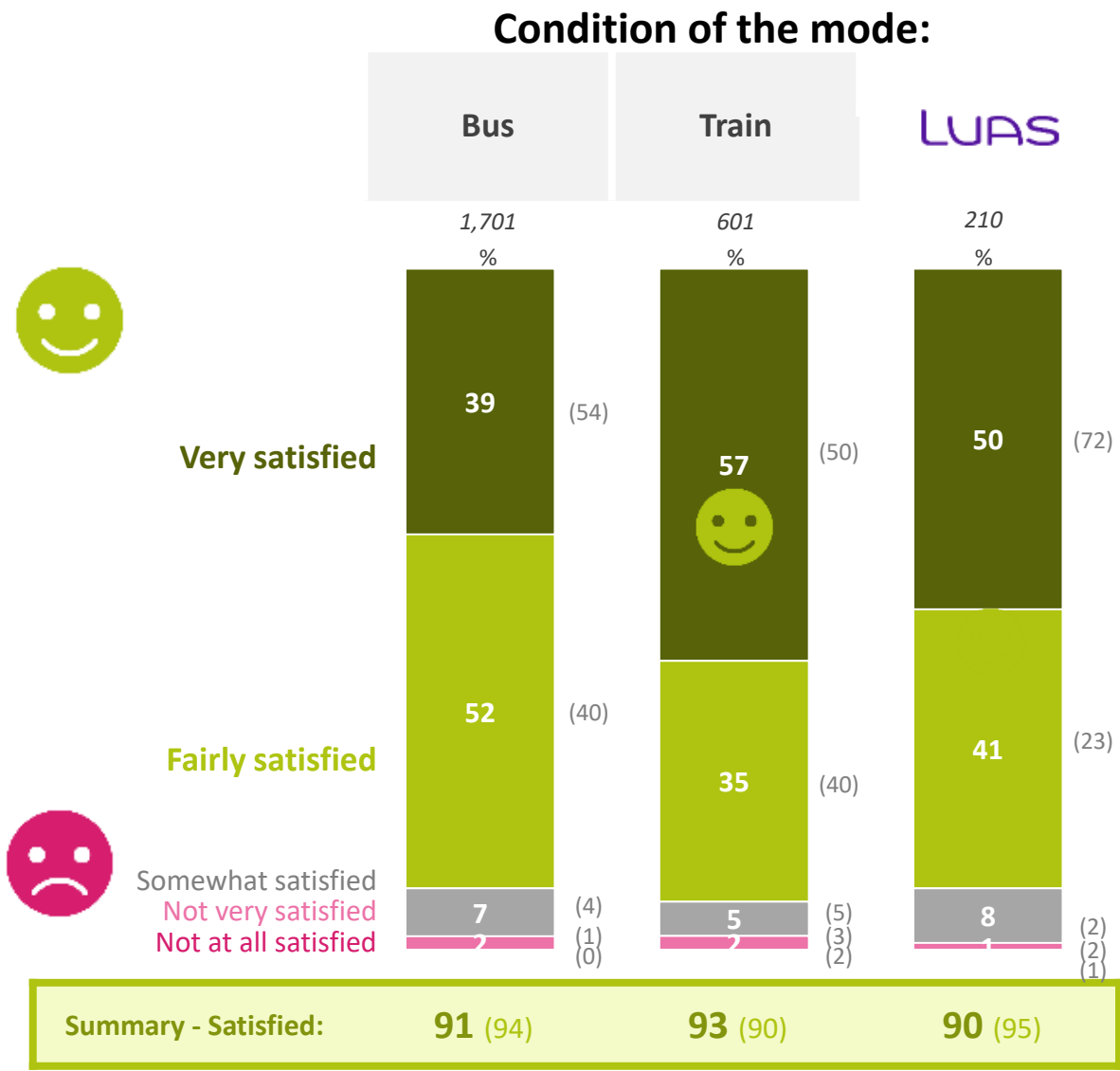




2.2 What's it like when using the service?

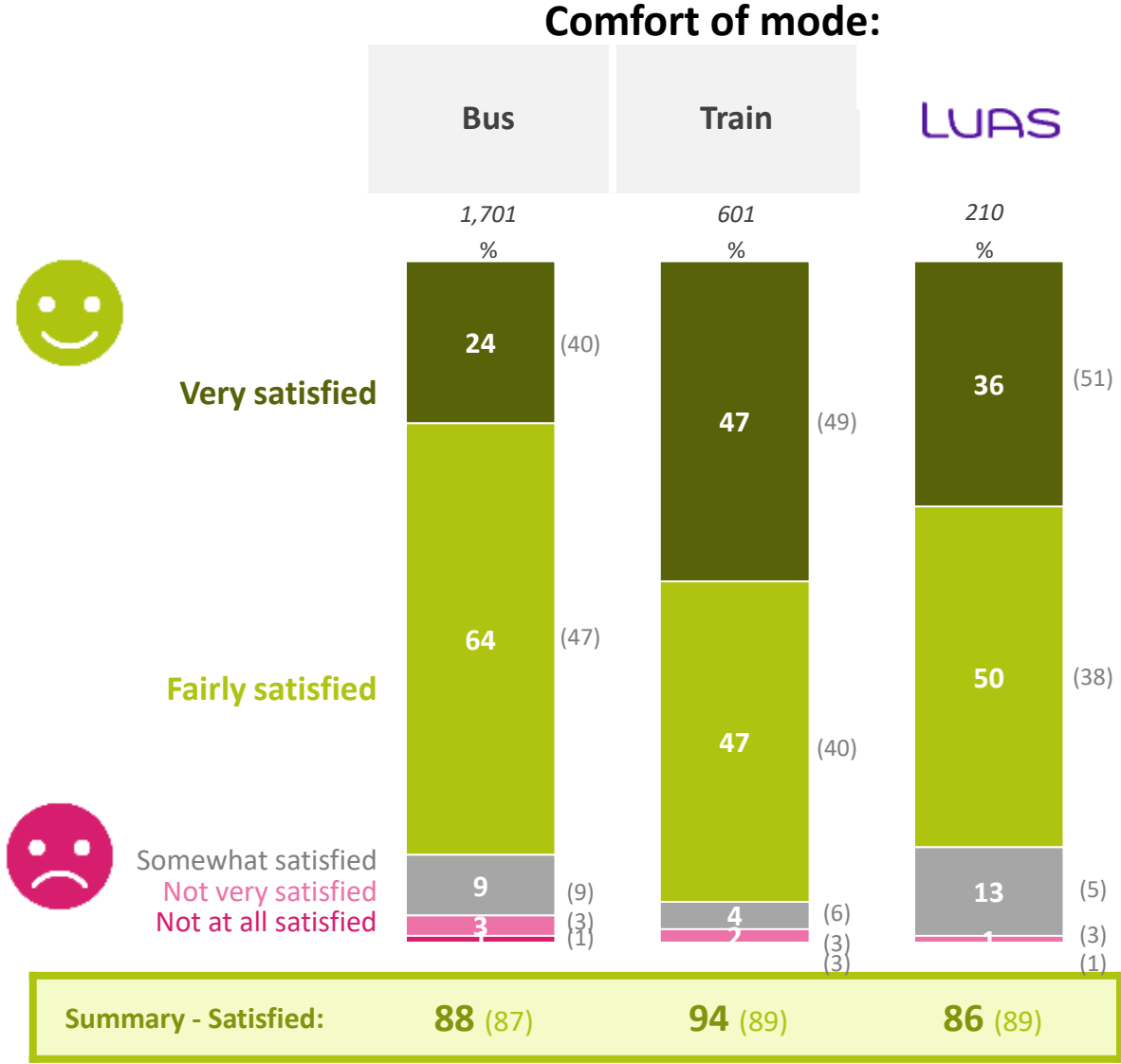
Satisfaction is high with the condition of the transport modes, satisfaction has intensified for Train

Base: All public transport customers - 2,513



Overall satisfaction with comfort is high across modes with Train being considered the most comfortable

Base: All public transport customers - 2,513

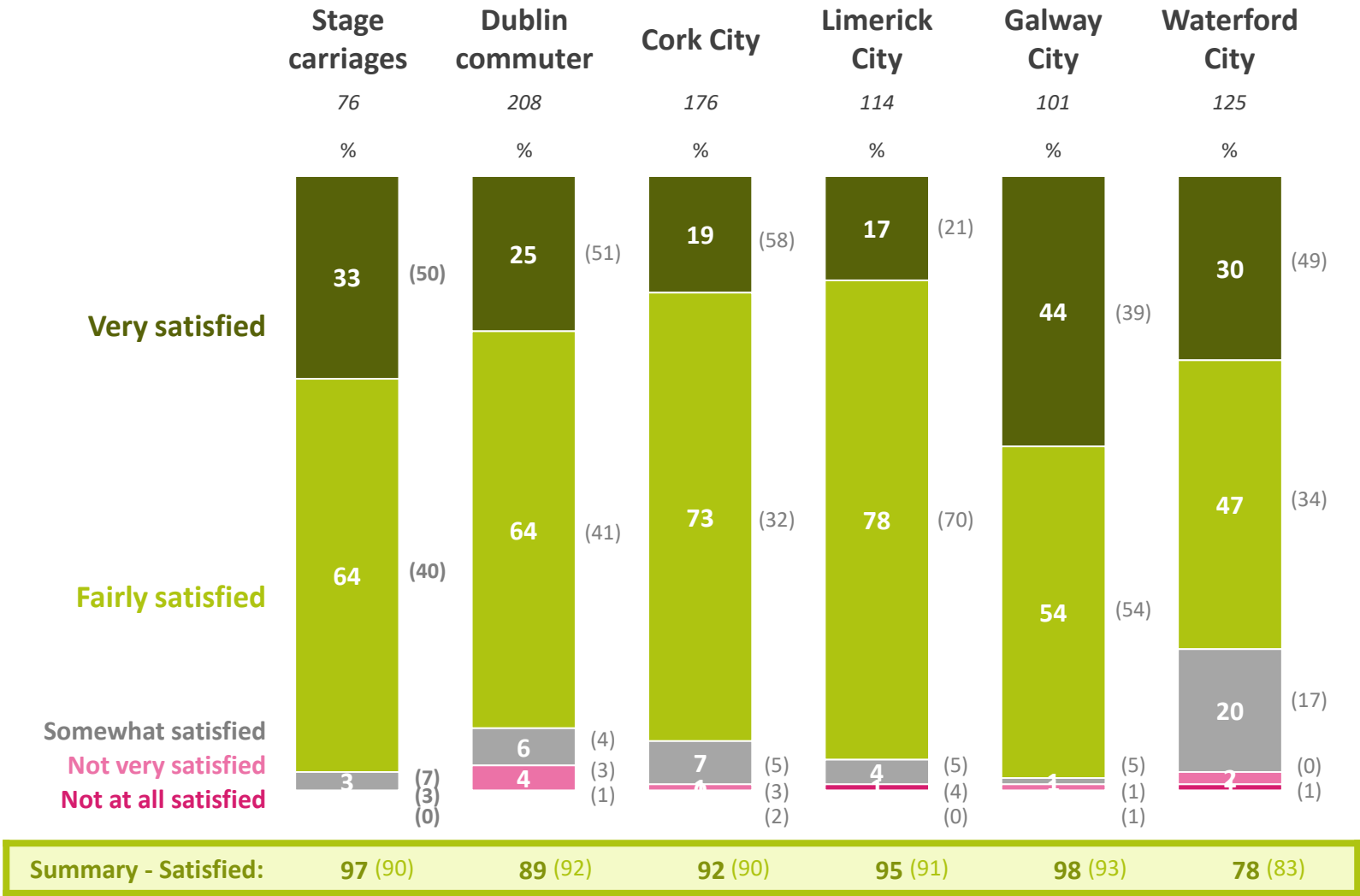


Satisfaction with comfort is particularly high in Galway and Stages carriages



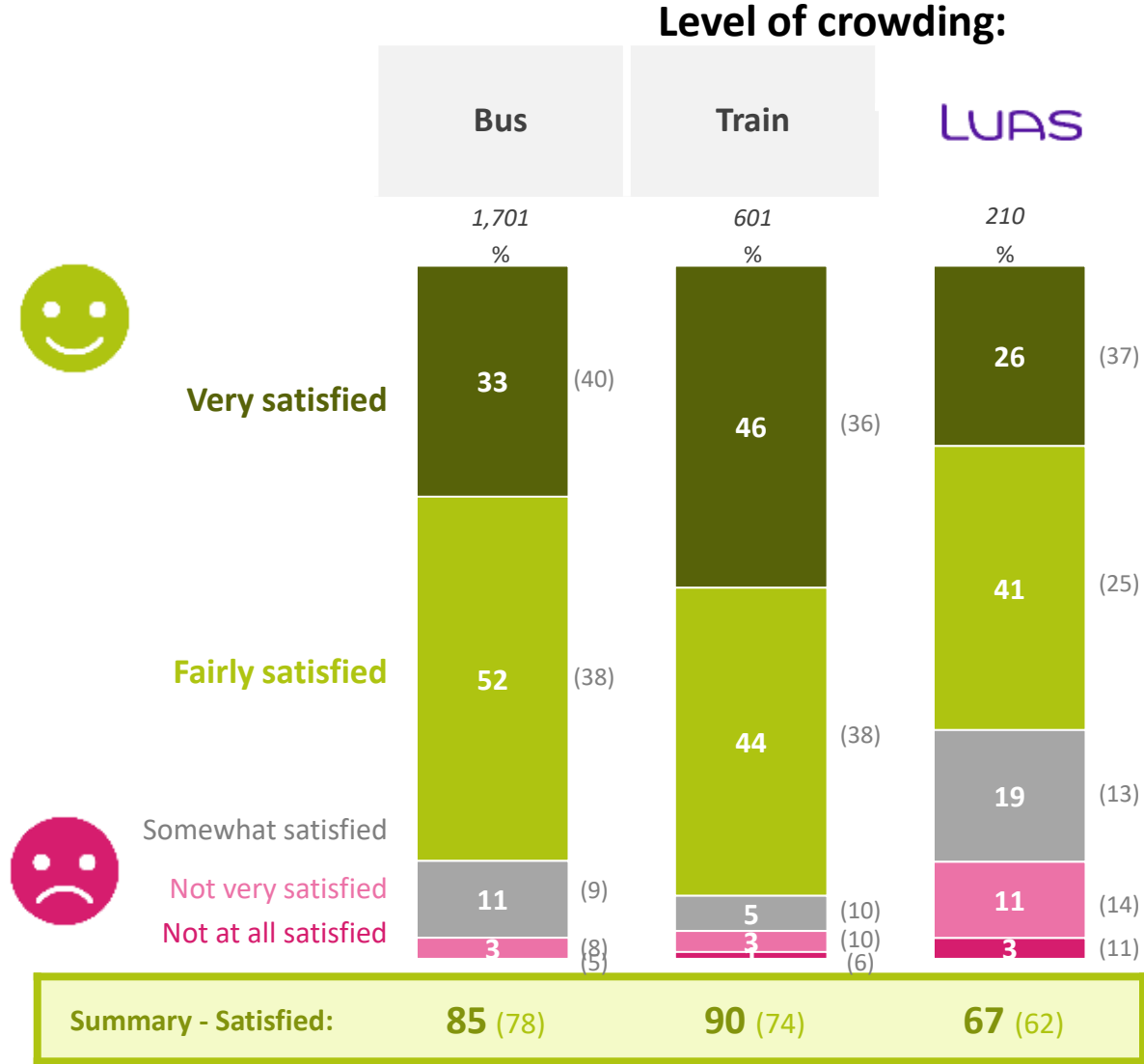
Base: All regional bus customers – 800

Bus comfort by region:



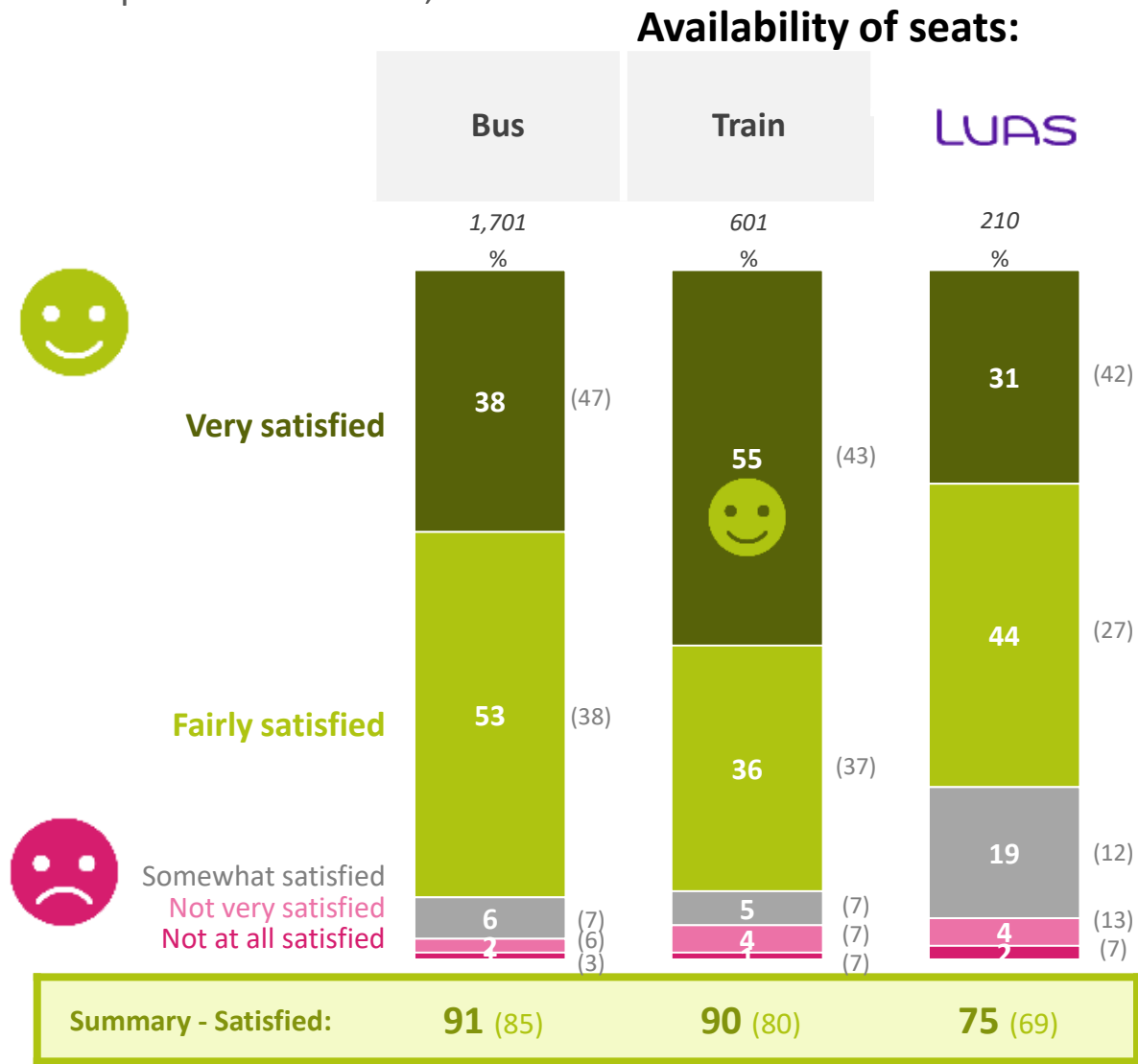
Satisfaction with crowding has increased post pandemic restrictions. Crowding is most pronounced for Luas

Base: All public transport customers - 2,513



Like crowding, satisfaction with the availability of seat has also increase post pandemic

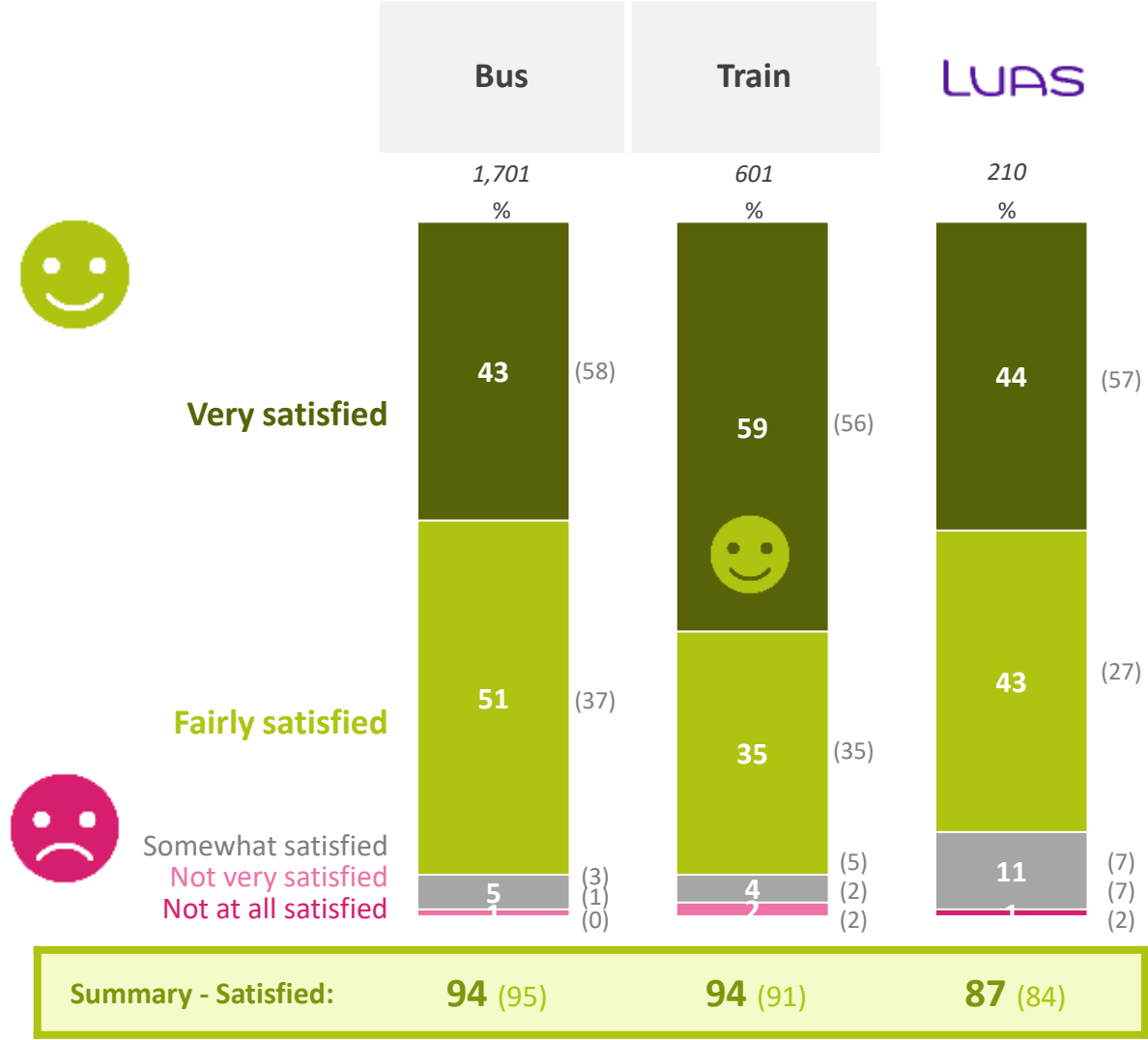
Base: All public transport customers - 2,513



Bus and Train preform higher than Luas on personal safety during transport journey

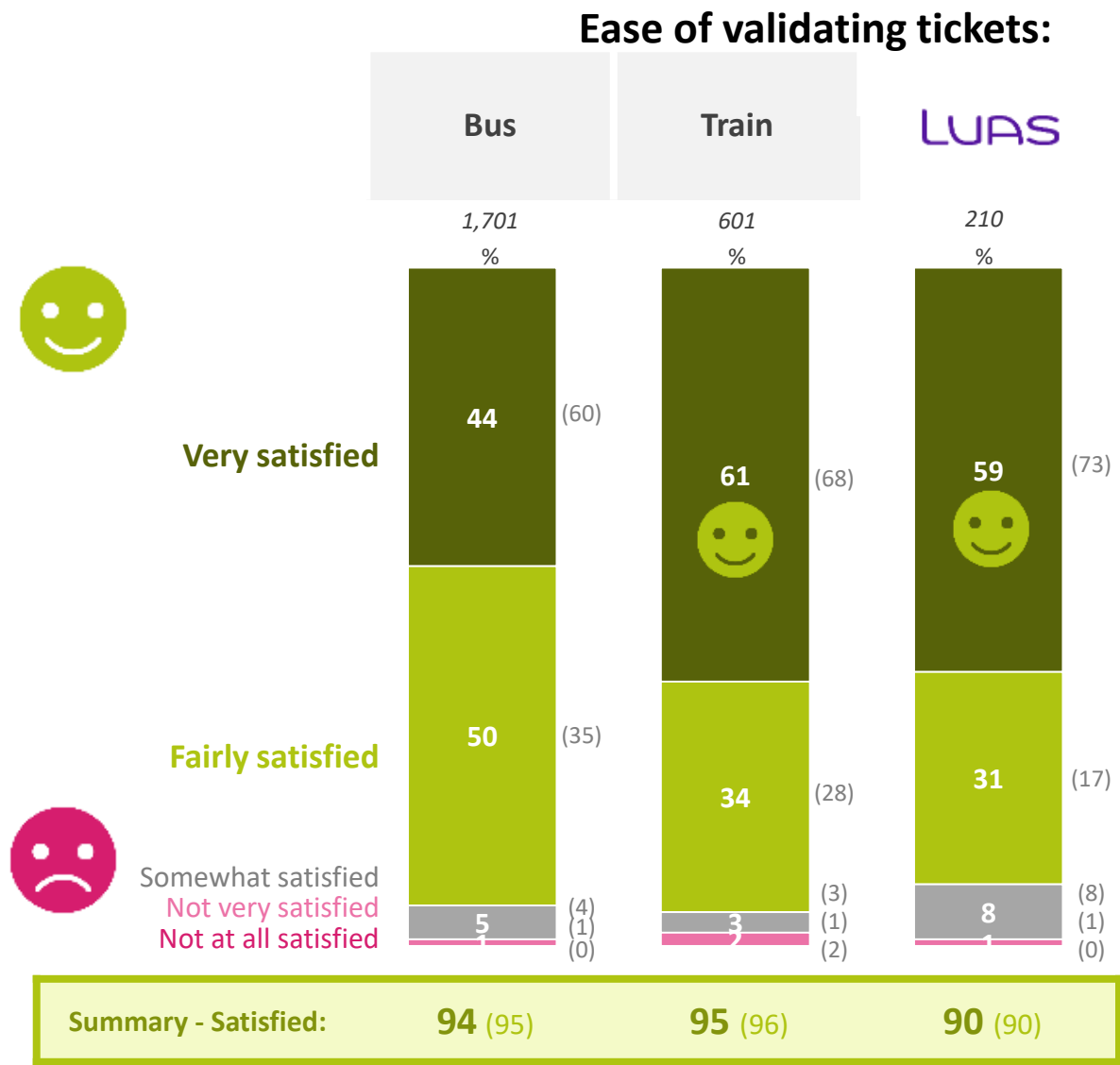
Base: All public transport customers - 2,513

Personal safety during your journey:



All modes performing well on ease of ticket validation

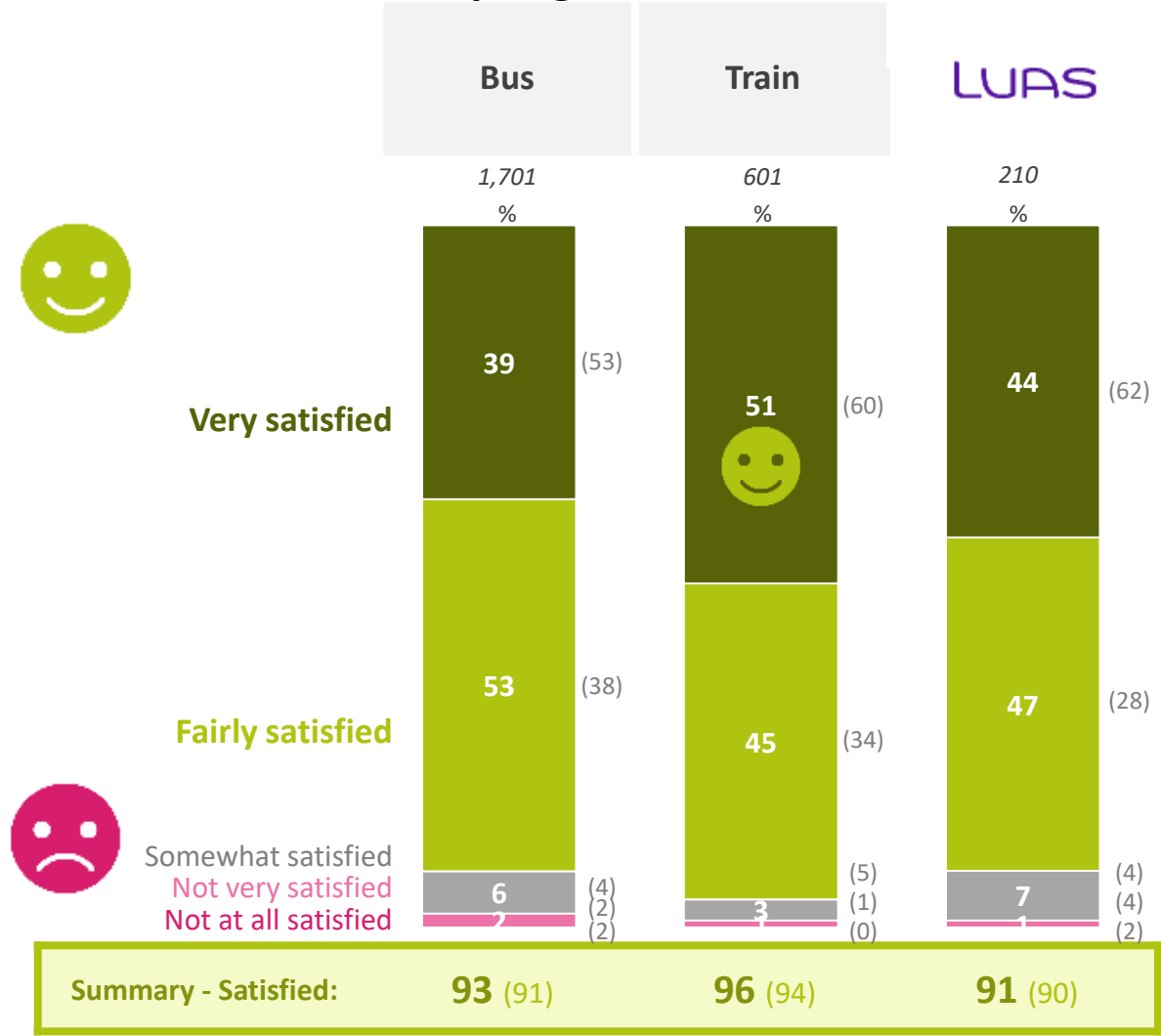
Base: All public transport customers - 2,513



All modes performing well on user being able to get on the first mode of transport that arrives, especially Train

Base: All public transport customers - 2,513

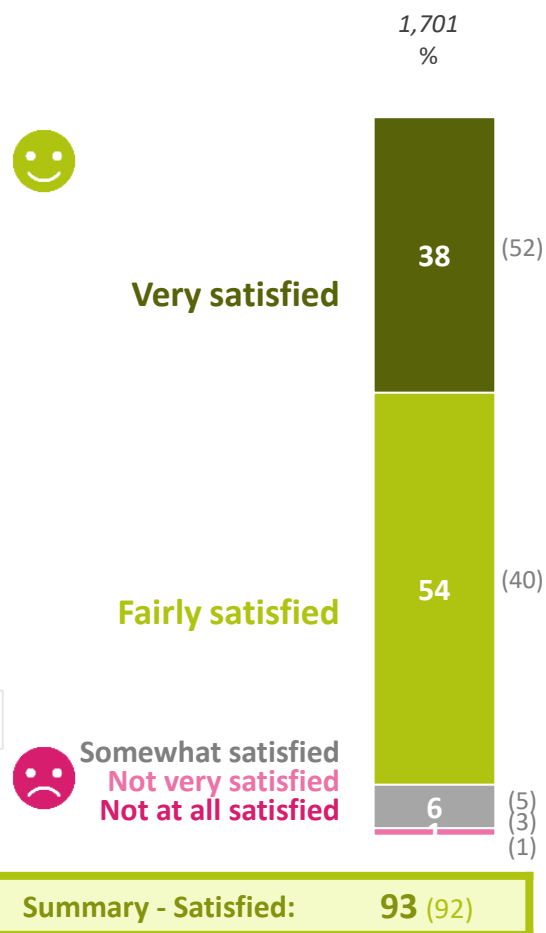
Ability to get on first mode that arrives:



93% satisfied with the time taken for boarding the bus

Base: All bus users – 1,701

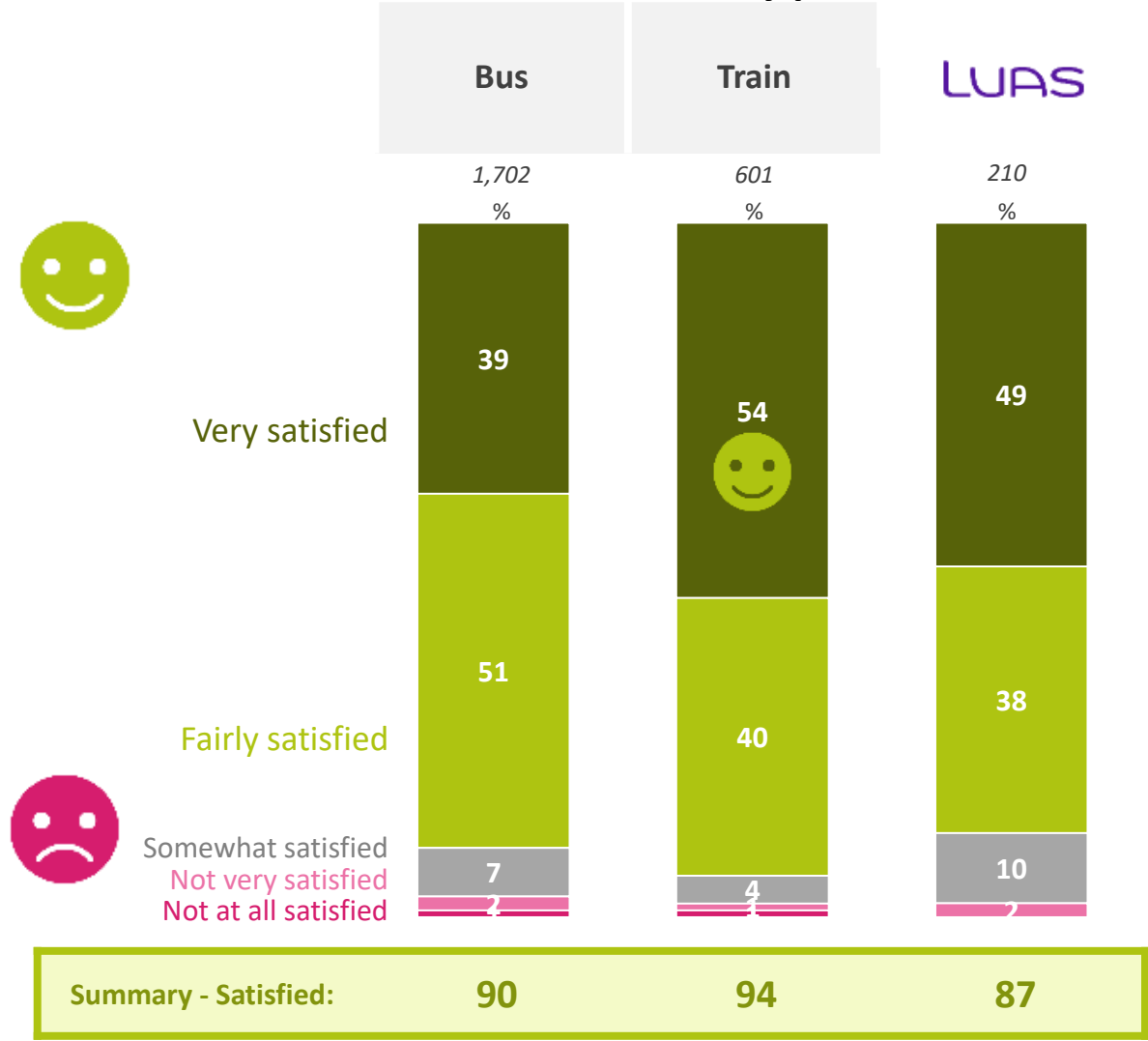
Time taken for people to get on bus:



High satisfaction ratings with COVID-19 information and safety measures across modes with Train being highest

Base: All public transport customers - 2,513

COVID-19 information and safety precautions measures:





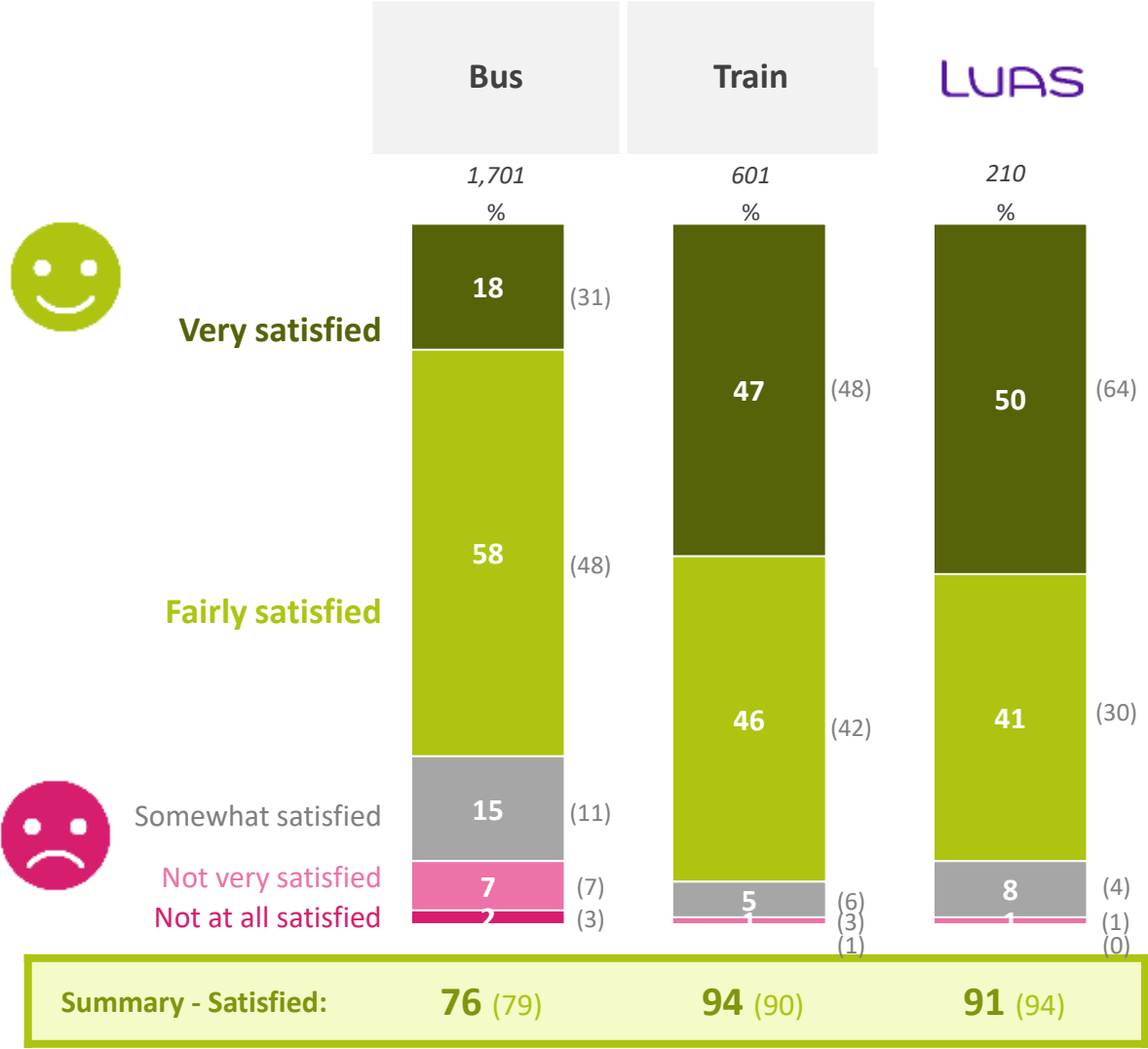
2.3 Reliability of the service

Criticism highest for reliability of Bus services, although 3 in 4 are satisfied



Base: All public transport customers - 2,513

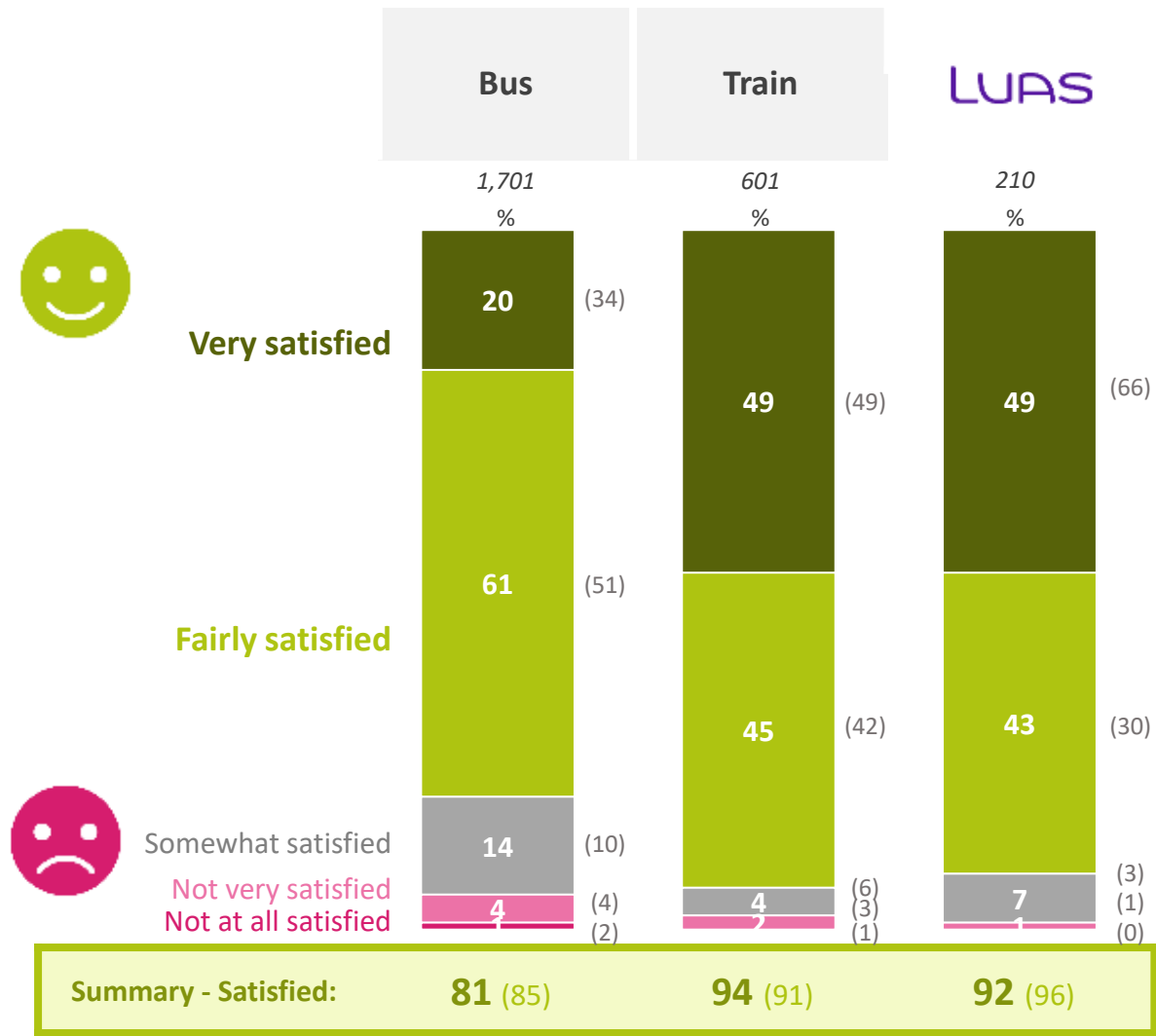
Reliability of mode arriving on time:



High satisfaction with punctuality of Train and Luas, some minor dissatisfaction among Bus users

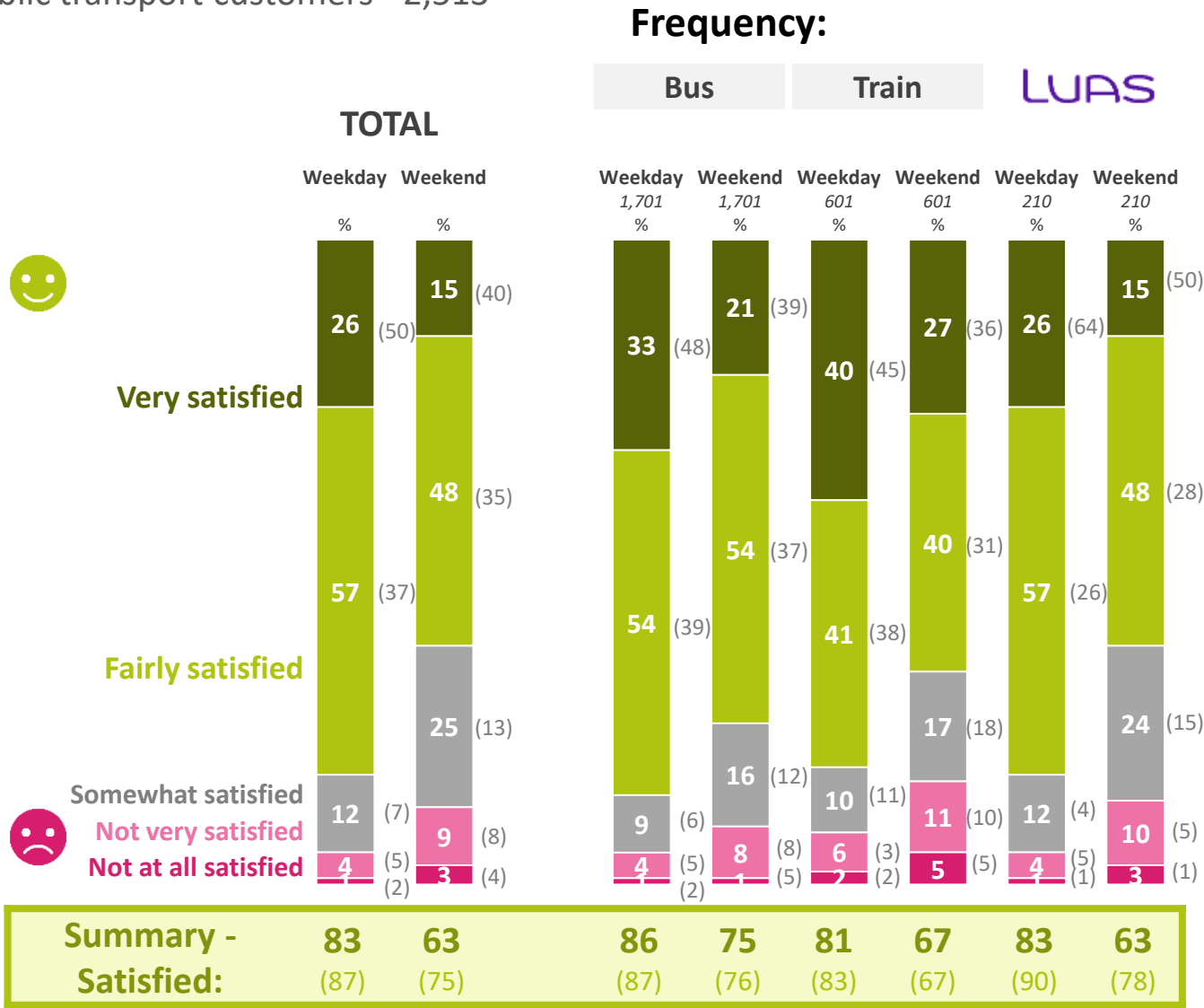
Base: All public transport customers - 2,513

Getting to destination on time:



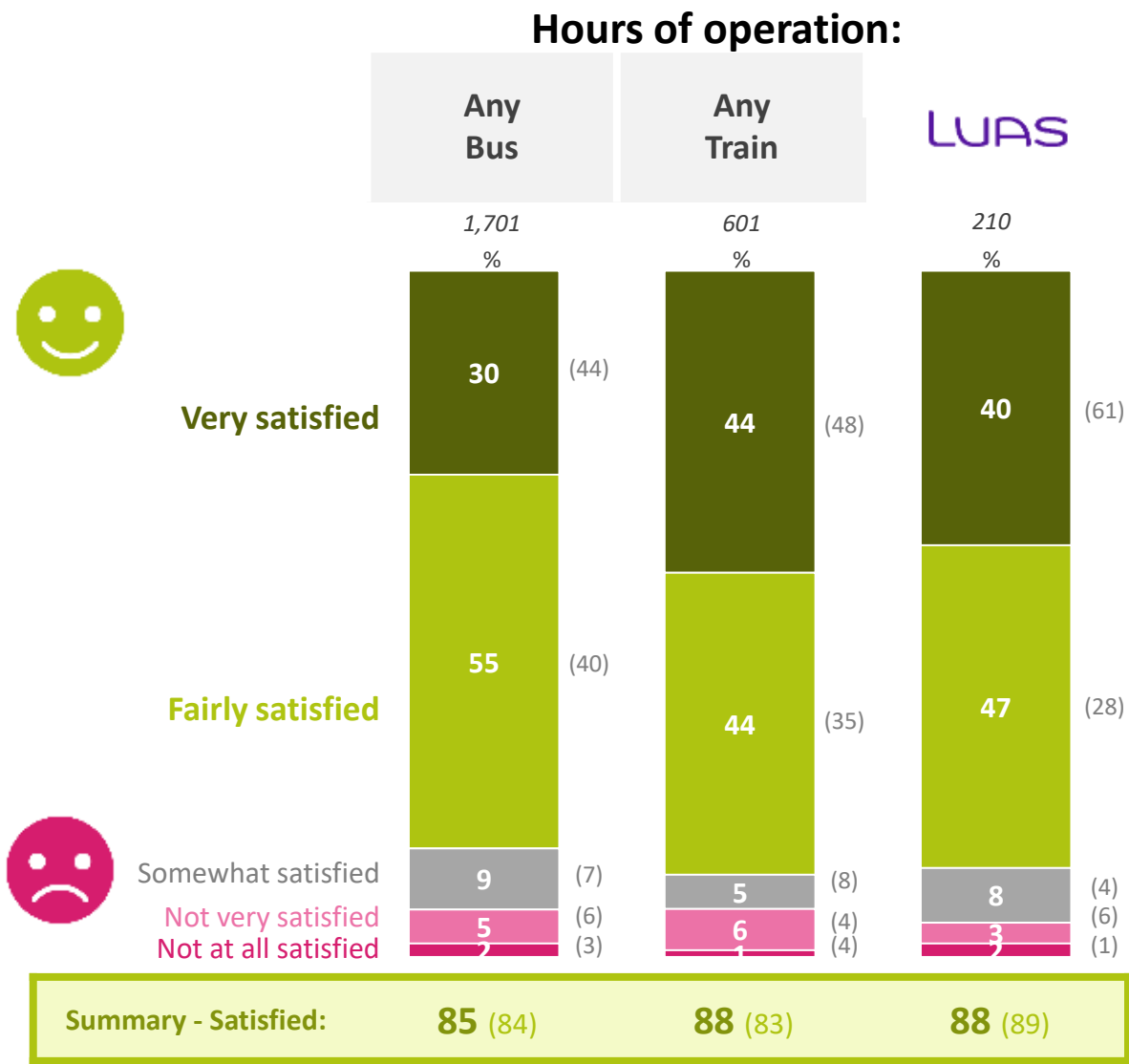
Satisfaction with frequency of mode is higher on weekdays compared to weekend across modes

Base: All public transport customers - 2,513



Satisfaction with hours of operation is high across modes

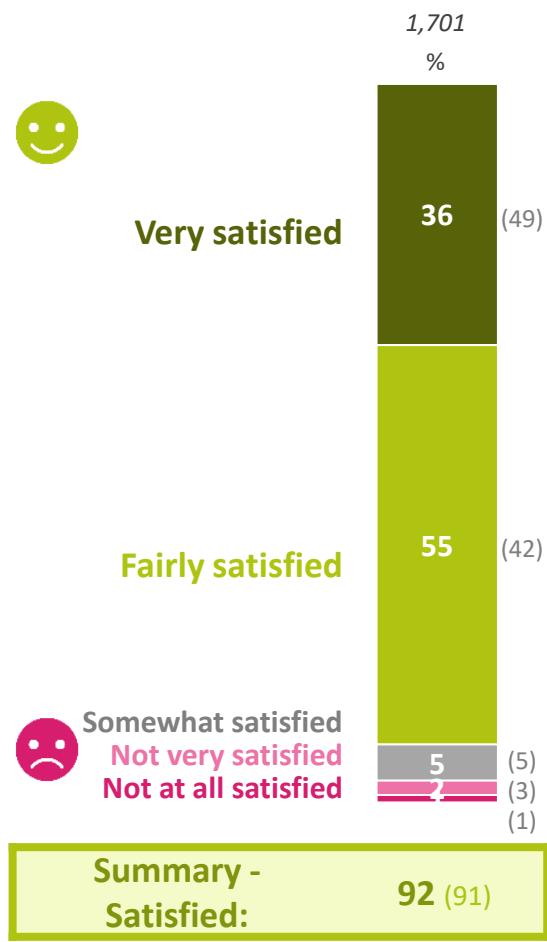
Base: All public transport customers - 2,513



Very high overall satisfaction with the convenience of bus routes

Base: All bus users: 1,701

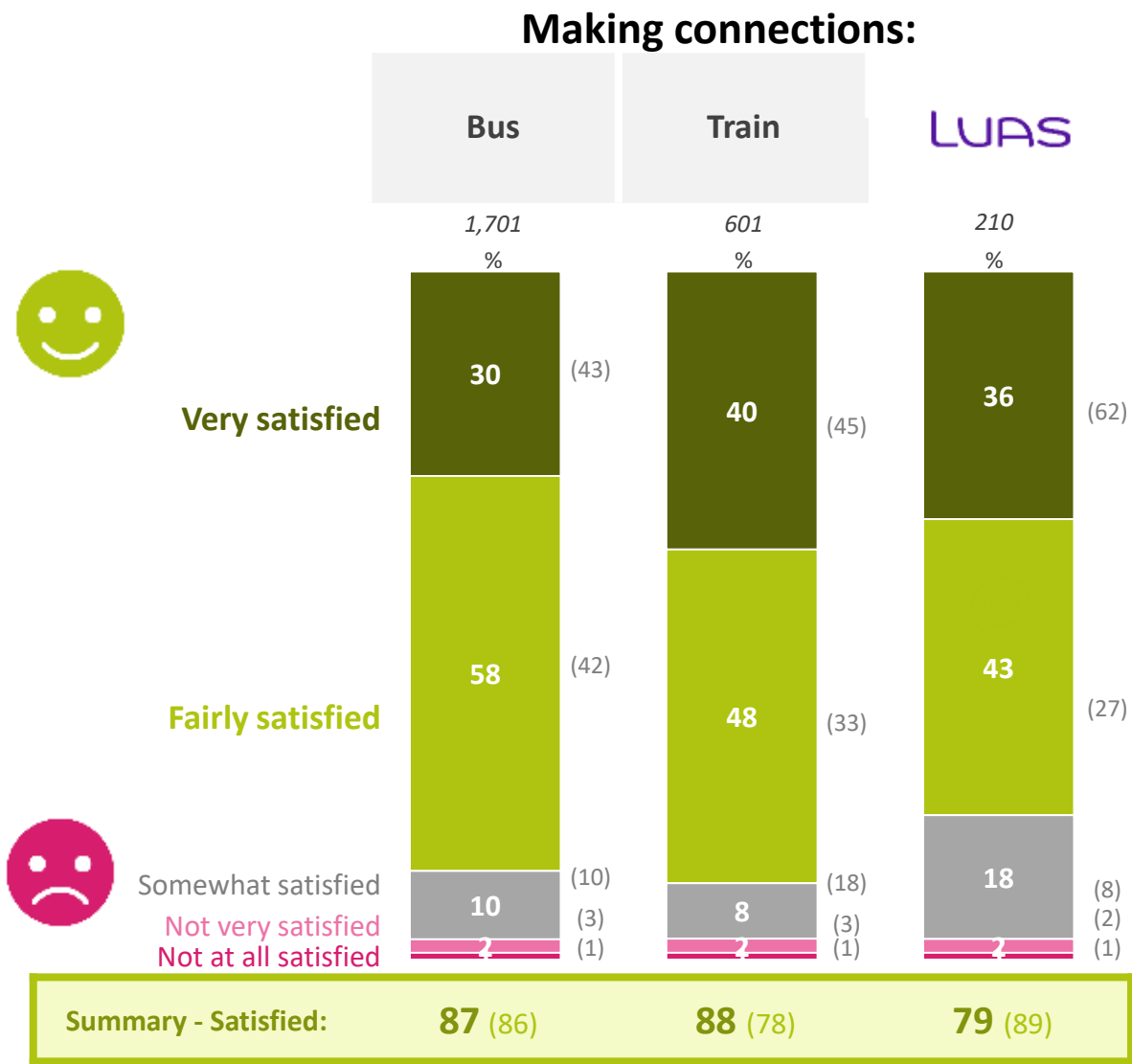
Convenience of bus route:

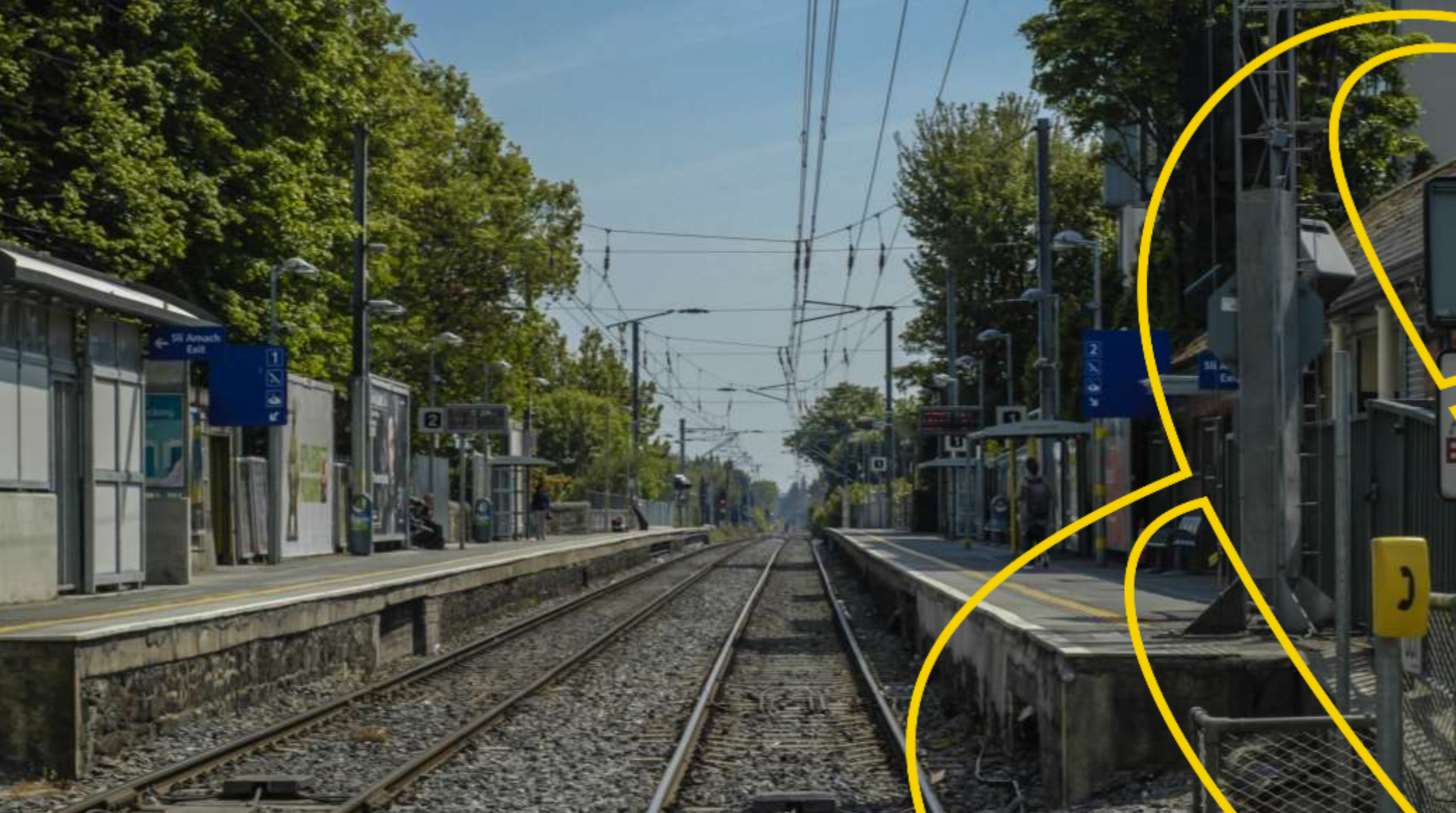


Customers are broadly satisfied with making connections with other public transport options however satisfaction is lower among Luas users



Base: All public transport customers - 2,513





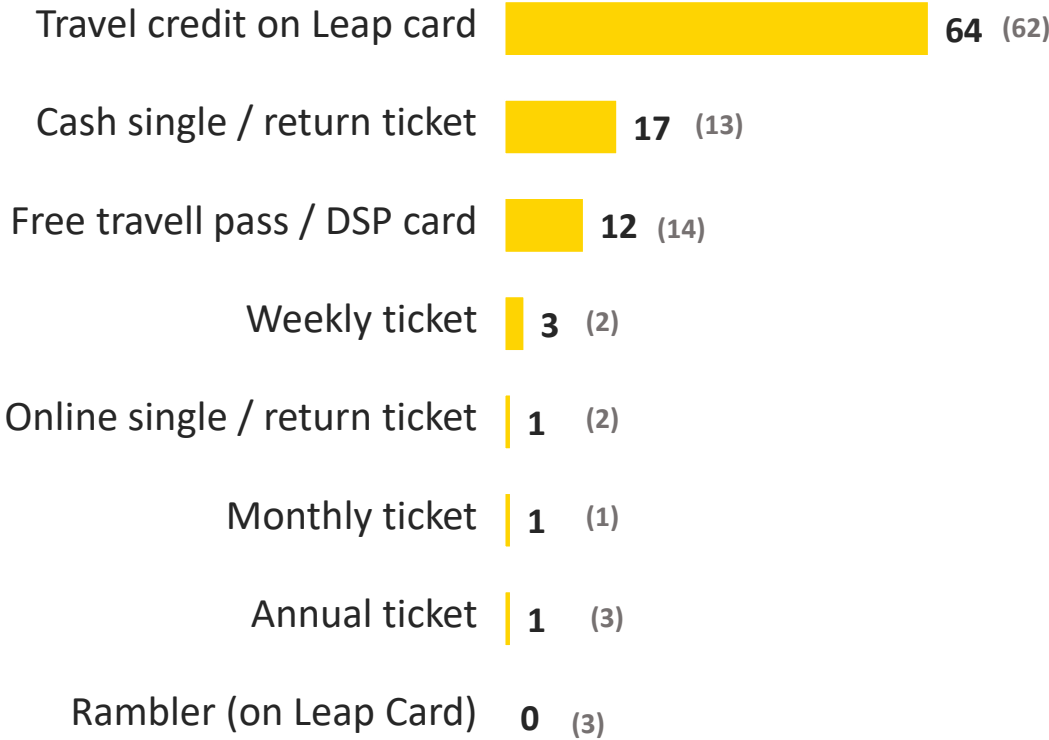
3. Ticketing

Leap Card continues to dominate as the main means of ticket



Base: All public transport customers - 2,513

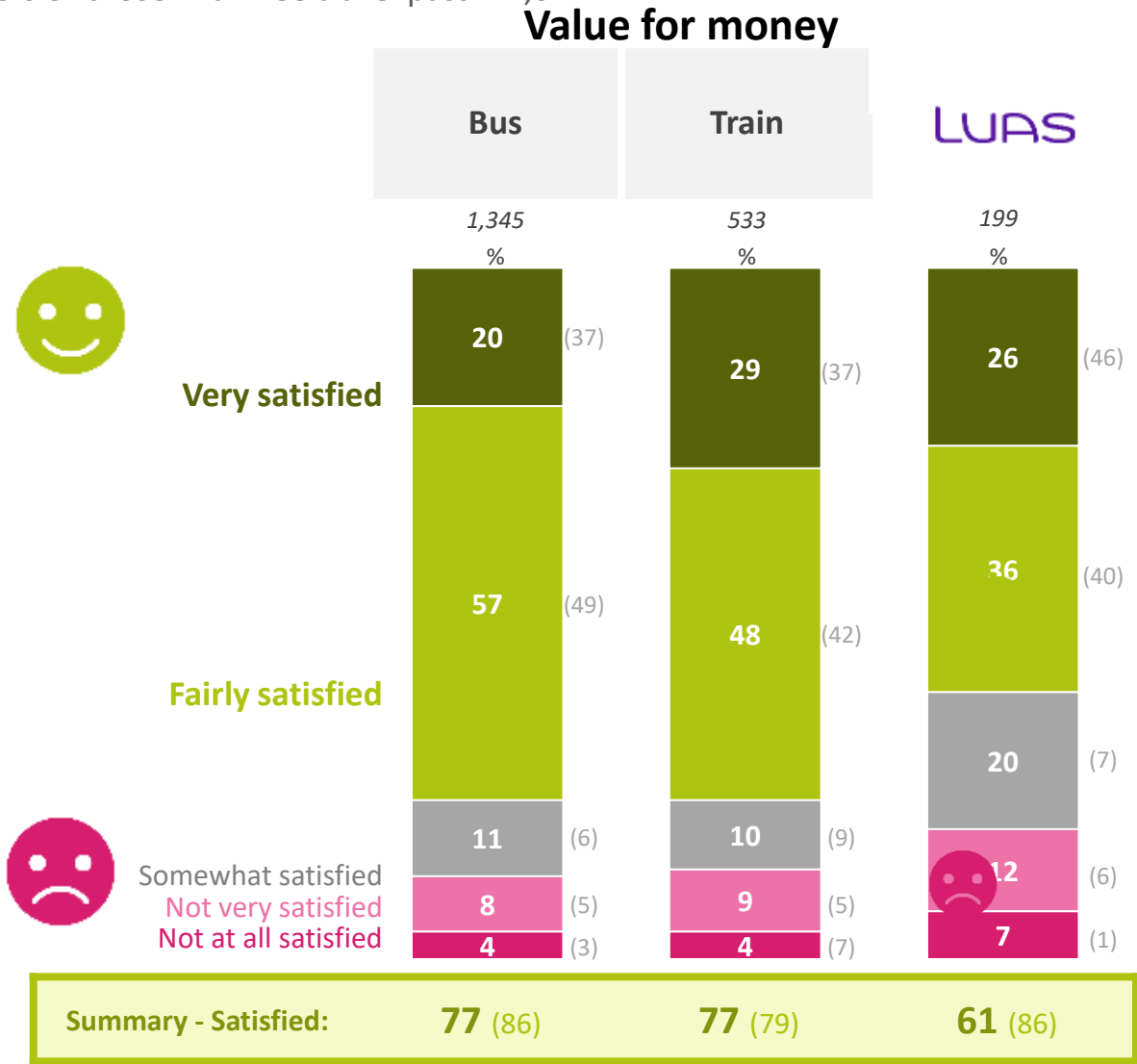
Type of ticket used: %



Any Bus	Any Train	LUAS
1,701	601	210
%	%	%
69	21	79
13	46	8
14	11	5
1	8	7
1	0	1
0	3	0
1	2	0
1	0	0

Satisfaction with value for money has decreased since 2019 with dissatisfaction being highest among Luas users

Base: All customers ex those with free travel pass – 2,077





6. Suggested areas for improvement

Increased reliability and cheaper fares are the most mentioned areas for improvement

Base: All who specified areas for improvement – 1,006

Suggested areas for improvement:

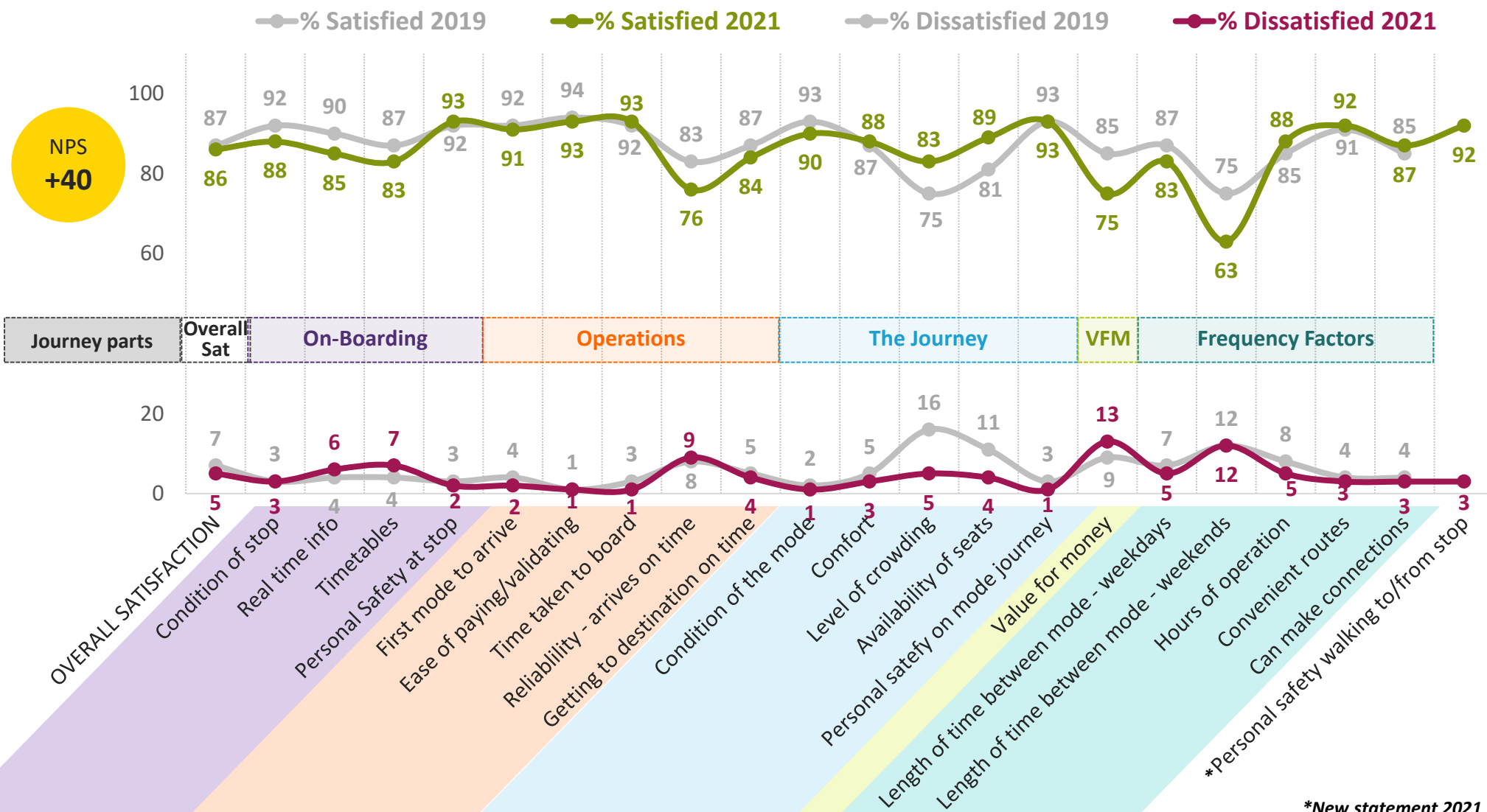
	TOTAL	Any Bus	Any Train	LUAS
Base :	1,006	640	284	82
	%	%	%	%
Punctual/Reliable – arrive, leave on time/Turn up/Stick to timetable	12	16	2	4
Cheaper/Lower fares	12	10	16	15
Frequent/Regular service	10	8	12	16
More/extra buses	8	12	0	-
More/Extra routes	8	9	3	10
Provide/Run later at night	9	9	6	9
Electronic/Real time signage needed/Improved	6	8	4	2
Security staff - on board, stations, car park/Address anti-social behaviour	6	2	11	26
Better service at weekends (more often, earlier, later)	5	5	11	2
Cashless payment options – Leap, debit card, Revolut, Goggle, Apple	5	6	4	-
COVID safety/Enforcement/Mention – sanitizer, mask	4	5	4	1
Others (all 3% or less)	32	24	52	40



8. Summary of satisfaction ratings

Limited movement from 2019. Satisfaction with perceived crowding and availability of seats has improved but satisfaction with frequency has decreased

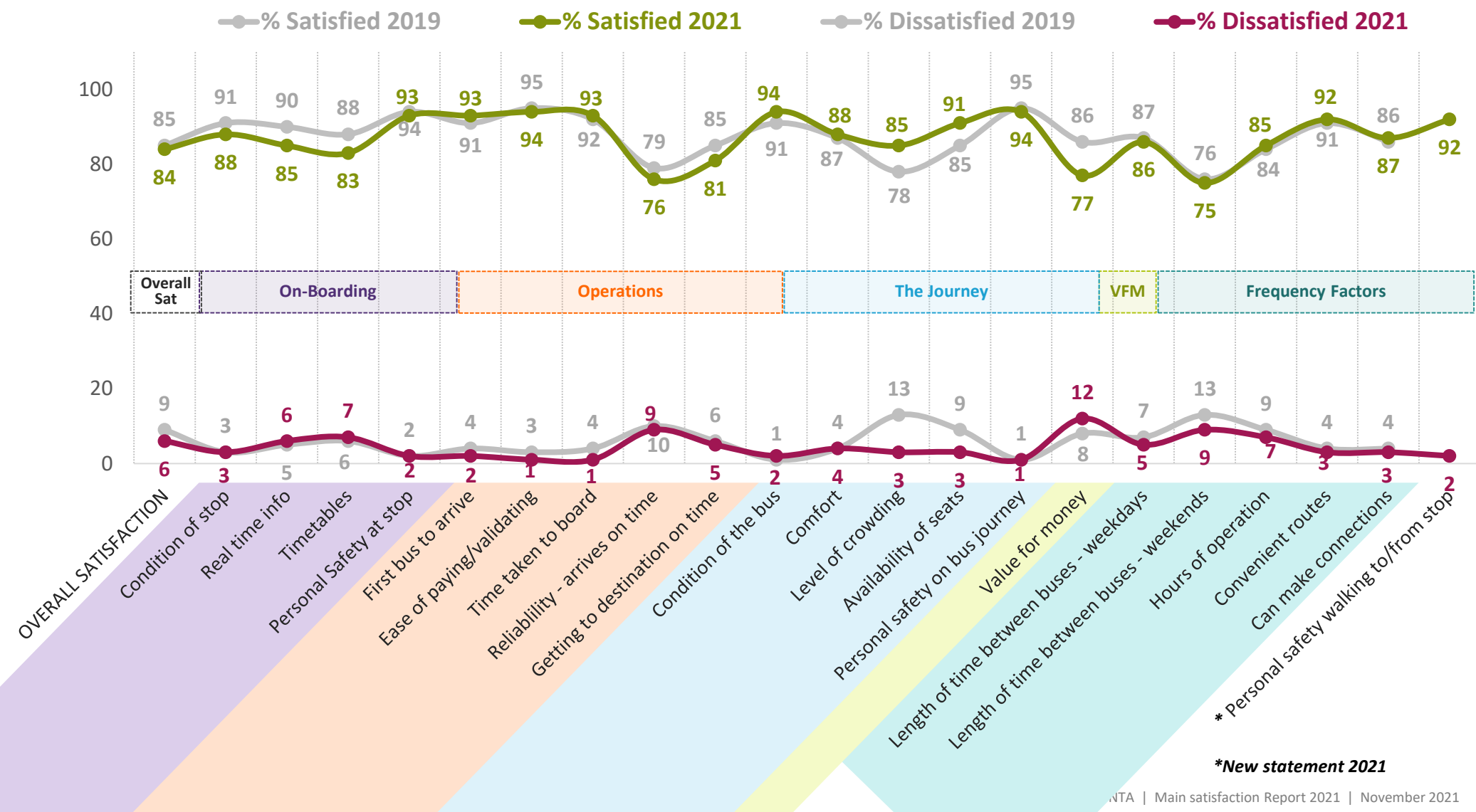
All forms of transport: Top 2 box 2019 vs 2021



*New statement 2021

Overall bus scores remain in line with 2019. While crowding and availability of seat has increased, real time info, timetables, on time arrival and value for money have decreased

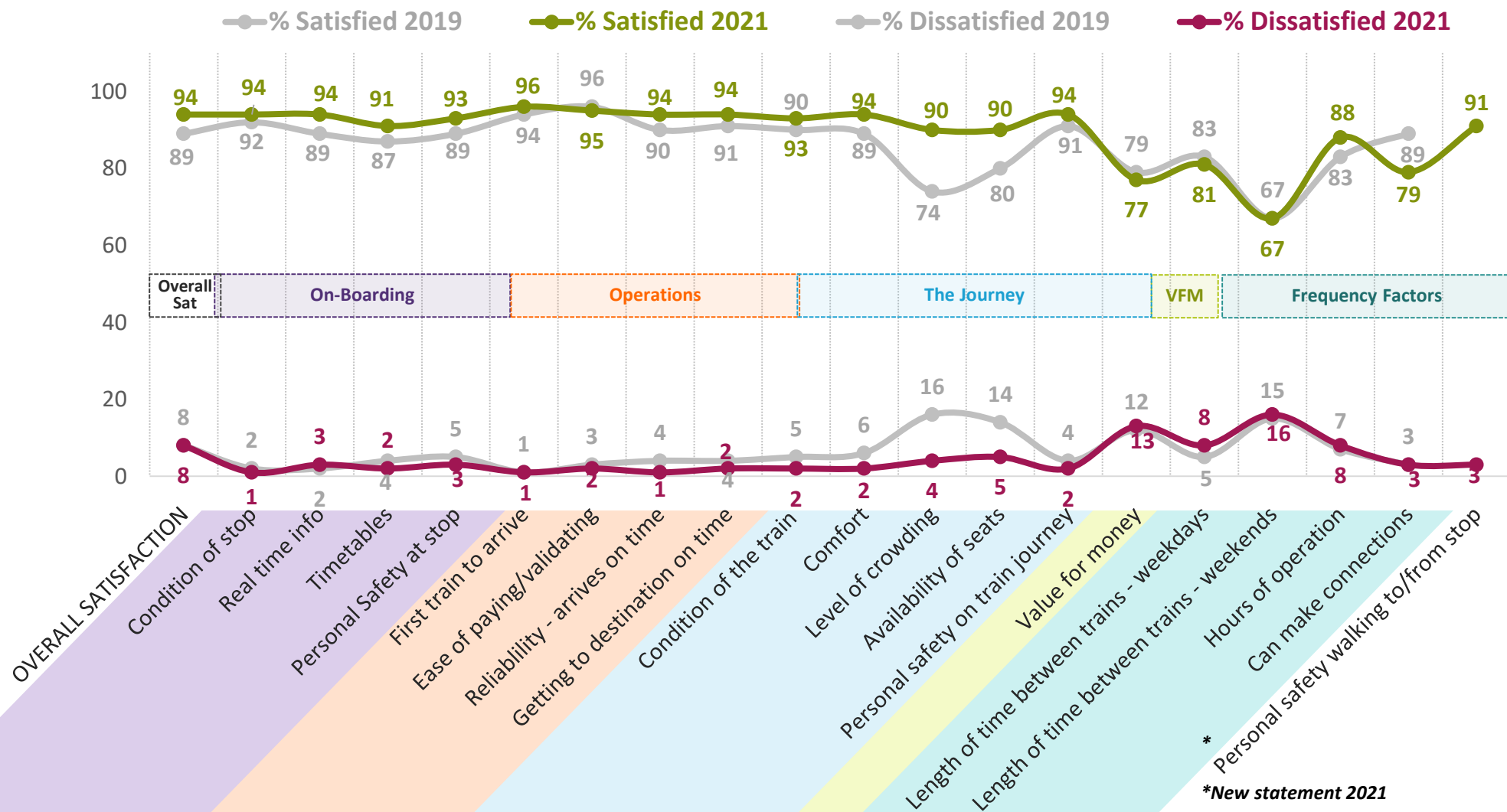
Bus: Top 2 box 2019 vs 2021



***New statement 2021**

Satisfaction with Train has increased slightly across multiple metrics with real time info, comfort, crowding availability of seat and operating hour increasing most

Train: Top 2 box 2019 vs 2021

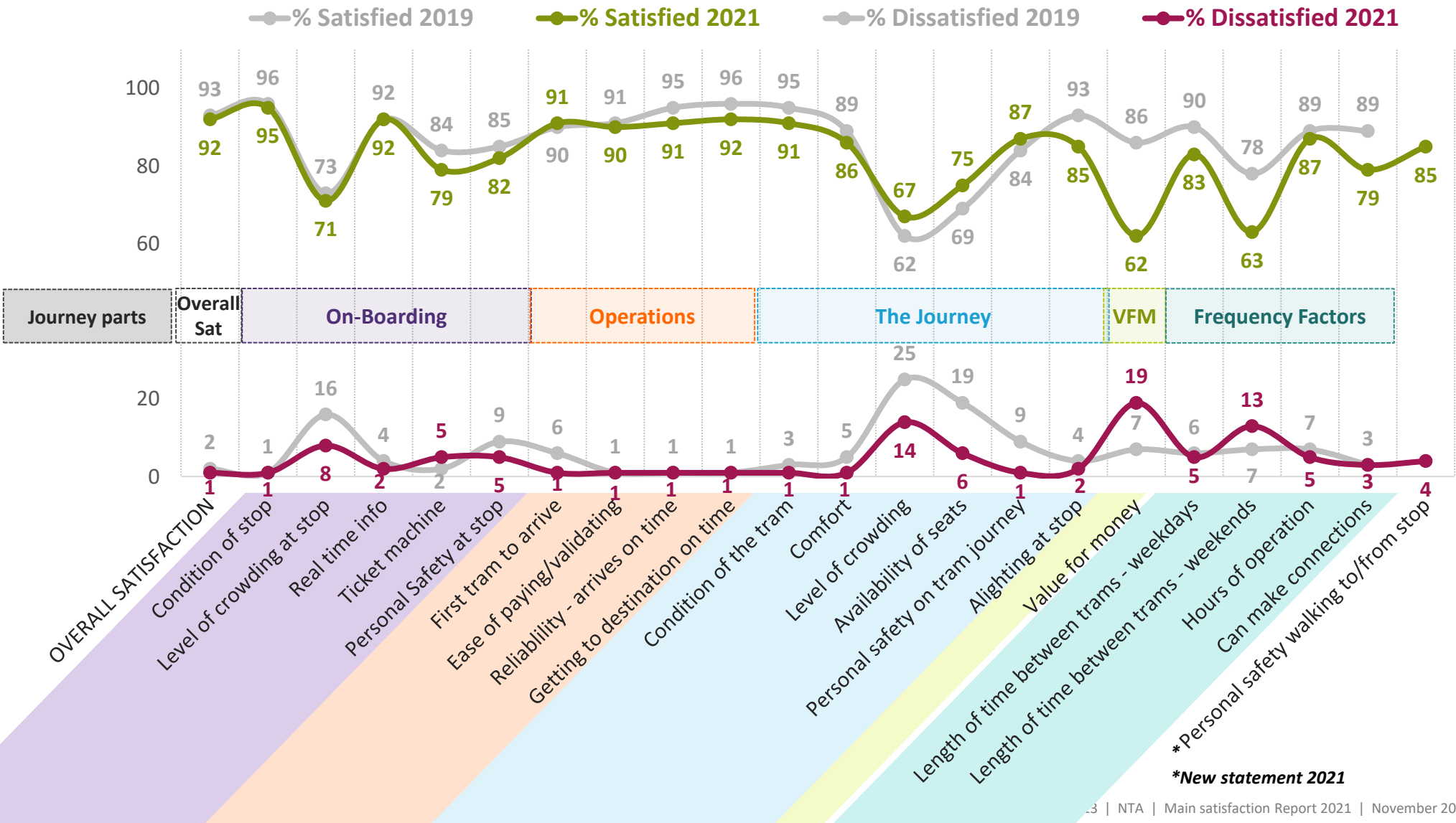


For Luas although overall satisfaction remains high, users are less satisfied with value for money and frequency of trams at the weekend

B&A

NPS
+75

Luas : Top 2 box 2019 vs 2021



Thank you.



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Delve Deeper