Customer Satisfaction 2022

On location survey

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1. Research approach and profile of sample

Research objectives and methodology

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

No. of interviews per transport mode

	2022	MOE @95% CL	2021
Bus Éireann	1632	+/-3%	800
Dublin Bus	912	+/-5%	398
Go Ahead Dublin	603	+/-6%	198
Go Ahead Kildare	210	+/-10%	-
Kilkenny Buses	200	+/-10%	102
TFI local link	387	+/-7%	0
Irish Rail	902	+/-6%	401
Irish Rail DART	612	+/-6%	200
LUAS	611	+/-6%	210
Total	6,069	+/-2%	2,513*

*Private bus adds N=202

Sample

Sample size: 2022 = 6,069
Sample size: 2021 = 2,513
Sample size 2019 = 5,015
Quotas applied to provide a robust sample size for each transport type. In 2022 new transport modes added namely; TFI Local link; Go Ahead was split out into Dublin and Kildare and private bus operators were no longer included.
No attempt made to weight data to trip volumes. Year on year comparisons within mode only.

Fieldwork dates
2022:
Wave 1 7th July - 8th August;
Wave 2 26th September – 31st October.
2021:
20th September – 3rd November
2019:
Wave 1 13th June – 6th July
Wave 2 8th September – 1st October

Profile of Sample I: Slightly more than half of the sample is female. The vast majority use public transport on weekdays.

Base: All Public Transport users N= 6,069

GENRE	DAY OF THE WEEK USAGE	AREA

GENDER

2022
%

Male — 42
Female — 58

DAY OF THE WEEK USAGE

2022
%

Weekday — 86
Weekend — 14

AREA

2022
%

Large city or a town — 39
Suburban area — 37
Small town/large/small village — 18
Townland or countryside
Refused — 4
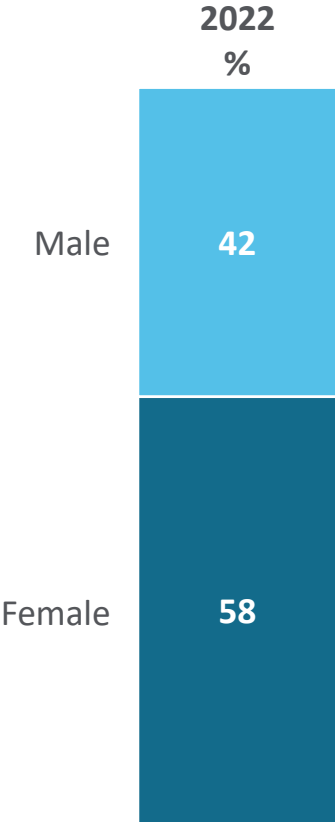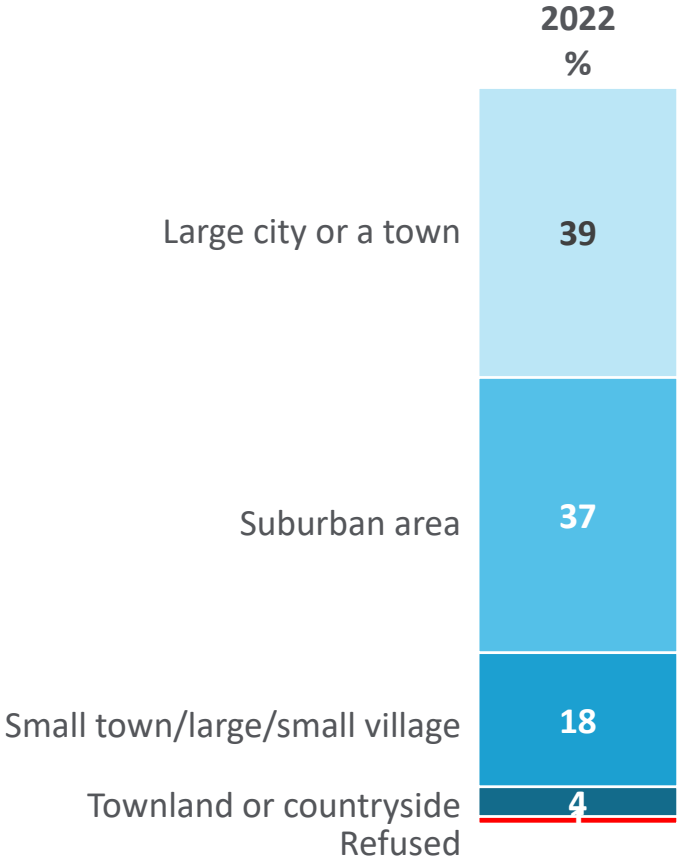
Profile of Sample II: Strong sample of regular users across modes.

Base: All Public Transport users N= 6,069

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
Base:	*6,069*	*3,944*	*1,514*	*611*
	%	%	%	%
Every day/weekdays	37	41	25	41
2-4 days a week	30	31	26	30
Once a week	13	13	15	11
Once a month	9	7	15	11
Once every 2-3 months	5	3	8	4
Once every 4-6 months	6	4	11	4

2.   Overall sentiment towards public transport

Overall sentiment towards public transport: More than 8 in 10 are satisfied with a positive NPS.

Base: All Public Transport users N= 6,069

	Overall satisfaction %	**Satisfaction with most recent trip %**	**Transport service vs. 12 months ago %**	**Net Promoter Score (NPS) Likely to recommend %**

Overall satisfaction %

- (5) Very satisfied: 38
- Fairly satisfied: 44
- 82%
- Neither satisfied nor dissatisfied: 10
- Fairly dissatisfied: 6
- (1) Very dissatisfied: 2

Satisfaction with most recent trip %

- 46
- 44
- 90%
- 7
- 2

Transport service vs. 12 months ago %

- Better now: 34
- About the same: 49
- Worse than it was: 5
- Don't know: 12

Net Promoter Score (NPS) Likely to recommend %

- 9-10: 47
- 7-8: 39
- 0-6: 13
- Don't know: 1

Average:	4.11	4.31	Net Better:*	+29	NPS:	+34

*Net Better = Better now minus worse than it was

Note: Data not comparable 2021 vs 2022 as sample structure altered

November 2022

Sentiment by Mode: Satisfaction is strongest for Tram. NPS is high across modes.

Base: All Public Transport users N= 6,069

	TOTAL	Bus	Rail	Tram
Base:	6,069	3,944	1,514	611
	%	%	%	%
Overall satisfaction (very+ fairly satisfied)	82	79	88	92
Satisfaction most recent trip (very+ fairly satisfied)	90	88	91	93
Net better (Better now minus worse than it was)	29	29	32	22
NPS (net promoter score) (Likely to recommend)	+33	+30	+32	+51

3. A deep dive into overall satisfaction

Satisfaction by mode: satisfaction is high across modes, very satisfied highest for Tram at 45% although has decreased from 2021.

Base: All Public Transport users N= 6,069

	Total	Bus	Rail			Tram		
	2022	**2022**	**2019**	**2021**	**2022**	**2019**	**2021**	**2022**
	6,069 %	*3,944 %*	*1,096 %*	*601 %*	*1,514 %*	*545 %*	*210 %*	*611 %*
Very satisfied	38	37	40	52	39	57	59	45
Fairly satisfied	44	42	49	42	49	36	36	47
Somewhat satisfied	10	11	6	4	8	5	4	6
Not very satisfied	6	7	3		3			
Not at all satisfied	2	3						
Very + fairly satisfied %	**82**	**79**	**89**	**94**	**88 (-6)**	**93**	**95**	**92 (-3)**
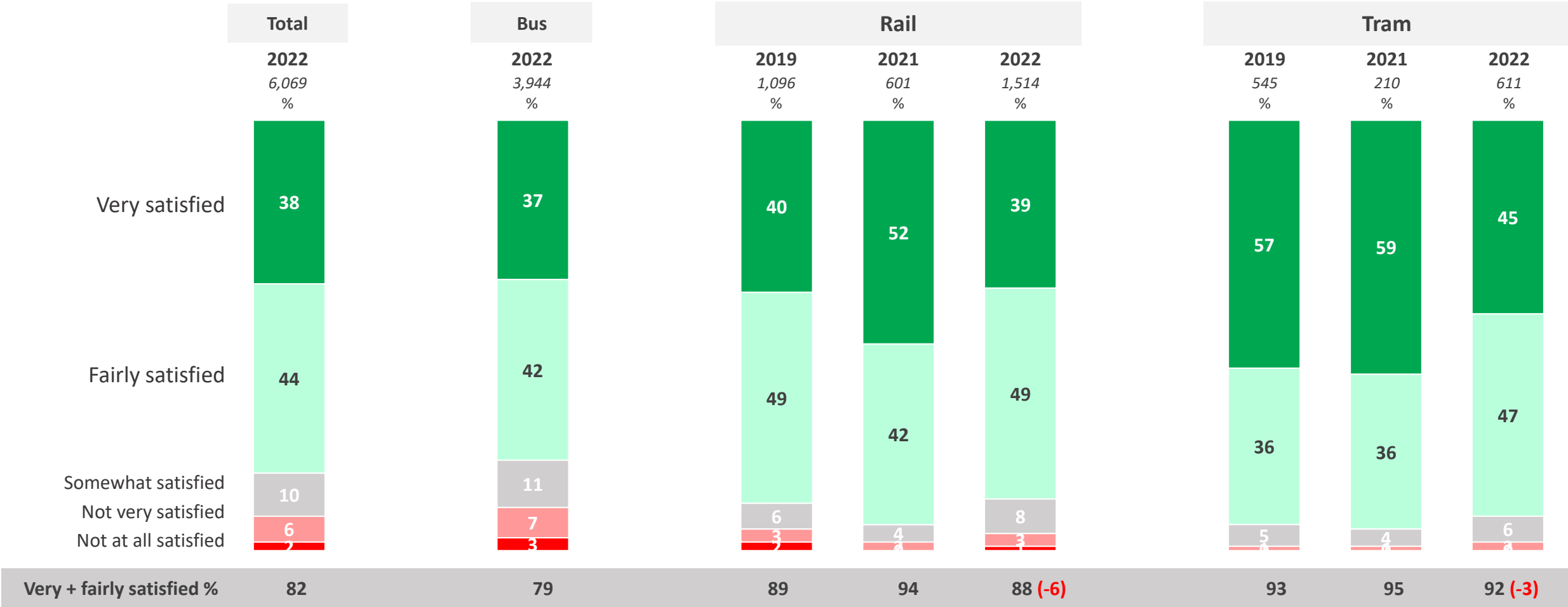
Note: total and bus data not comparable 2021 vs 2022 as sample structure altered
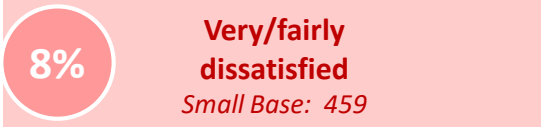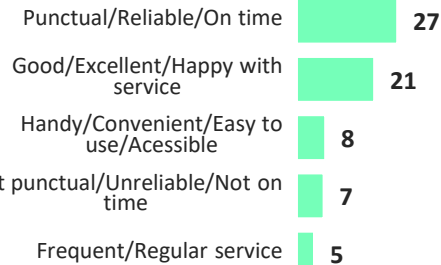
() +/- vs. 2021

November 2022

Key reasons for satisfaction and dissatisfaction: Punctuality and level of service are key drivers of satisfaction.
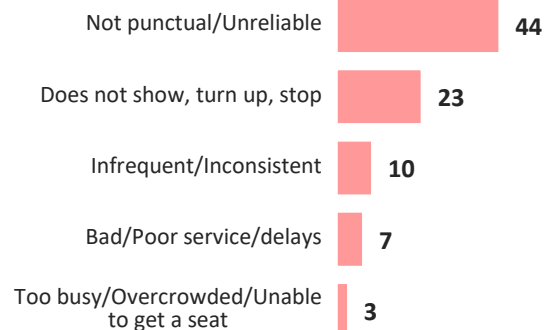
Base: All Public Transport users N= 6,069
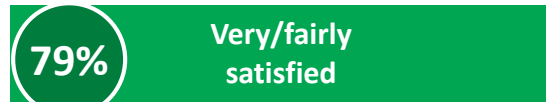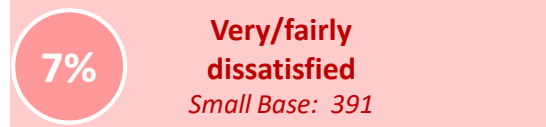
TOTAL PUBLIC TRANSPORT

82% Very/fairly satisfied

Key reasons for satisfaction %

- Punctual/Reliable/On time — 27
- Good/Excellent/Happy with service — 21
- Handy/Convenient/Easy to use/Acessible — 8
- Not punctual/Unreliable/Not on time — 7
- Frequent/Regular service — 5

8% Very/fairly dissatisfied
Small Base: 459

Key reasons for dissatisfaction %

- Not punctual/Unreliable — 44
- Does not show, turn up, stop — 23
- Infrequent/Inconsistent — 10
- Bad/Poor service/delays — 7
- Too busy/Overcrowded/Unable to get a seat — 3

Bus

79% Very/fairly satisfied

Key reasons for satisfaction %

- Punctual/Reliable/On time — 25
- Good/Excellent/Happy with service — 23
- Handy/Convenient/Easy to use/Acessible — 6
- Pleasant/Friendly/Helpful staff, drivers — 6
- Satisfied/Ok/Better than before — 5
- Frequent/Regular service — 4
- Affordable/Cheap/Value for money — 4

7% Very/fairly dissatisfied
Small Base: 391

Key reasons for dissatisfaction %

- Not punctual/Unreliable — 47
- Does not show, turn up, stop — 27
- Infrequent/Inconsistent — 9
- Bad/Poor service/delays — 5
- Too busy/Overcrowded/Unable to get a seat — 3
- More service needed e.g. run earlier, later — 3
- Unfriendly/Rude/Aggressive/Impatient staff — 3

Train

88% Very/fairly satisfied

Key reasons for satisfaction %

- Punctual/Reliable/On time — 30
- Good/Excellent/Happy with service — 19
- Comfortable/Relaxing/Enjoyable — 8
- Handy/Convenient/Easy to use/Acessible — 8
- Fast/Direct/Quick/Easy — 5
- Good level of hygiene/Cleanliness — 4
- Frequent/Regular service — 4

4% Very/fairly dissatisfied
Small Base: 51

Key reasons for dissatisfaction %

- Not punctual/Unreliable — 37
- Bad/Poor service/delays — 14
- Infrequent/Inconsistent — 10
- Poor level of hygiene/Dirty seats/Litter/Toilets not clean — 6
- Does not show, turn up, stop — 4
- Too busy/Overcrowded/Unable to get a seat — 4
- Upgrade/Modernise — 4
- Issues booking tickets/assigned seating — 4
- Could be better/Room for improvement — 4
- Poor customer service/Communication - do not... — 4

Tram

92% Very/fairly Satisfied

Key reasons for satisfaction %

- Punctual/Reliable/On time — 31
- Fast/Direct/Quick/Easy — 17
- Handy/Convenient/Easy to use/Acessible — 16
- Good/Excellent/Happy with service — 11
- Frequent/Regular service — 11
- Good level of hygiene/Cleanliness — 5

2% Very/fairly dissatisfied
Small Base: 17*

Key reasons for dissatisfaction %

- Bad/Poor service/delays — 29
- Poor/More security to address anti-social behaviour — 29
- Infrequent/Inconsistent — 12
- Too busy/Overcrowded/Unable to get a seat — 12
- Poor level of hygiene/Dirty seats/Litter/Toilets not clean — 6
- Improve service - more buses, trains, trams, carriages — 6
- Issues booking tickets/assigned seating — 6
- Slow/Too many stops — 6

4. Overall Satisfaction with key travel attributes

Overall satisfaction with key travel attributes: Four in five are satisfied across attributes, but satisfaction with comfort is the strongest.

Base: All Public Transport users N= 6,069

Satisfaction with…

	Reliability %	Cleanliness %	Comfort %	Crowding %	Availability of seats %
Very satisfied	35	41	44	33	38
Fairly satisfied	42	40	45	47	45
	77%	81%	89%	80%	83%
Neither satisfied nor dissatisfied	11	11	8	12	10
Fairly dissatisfied	8	6	2	6	5
Very dissatisfied	4	2		2	2

November 2022
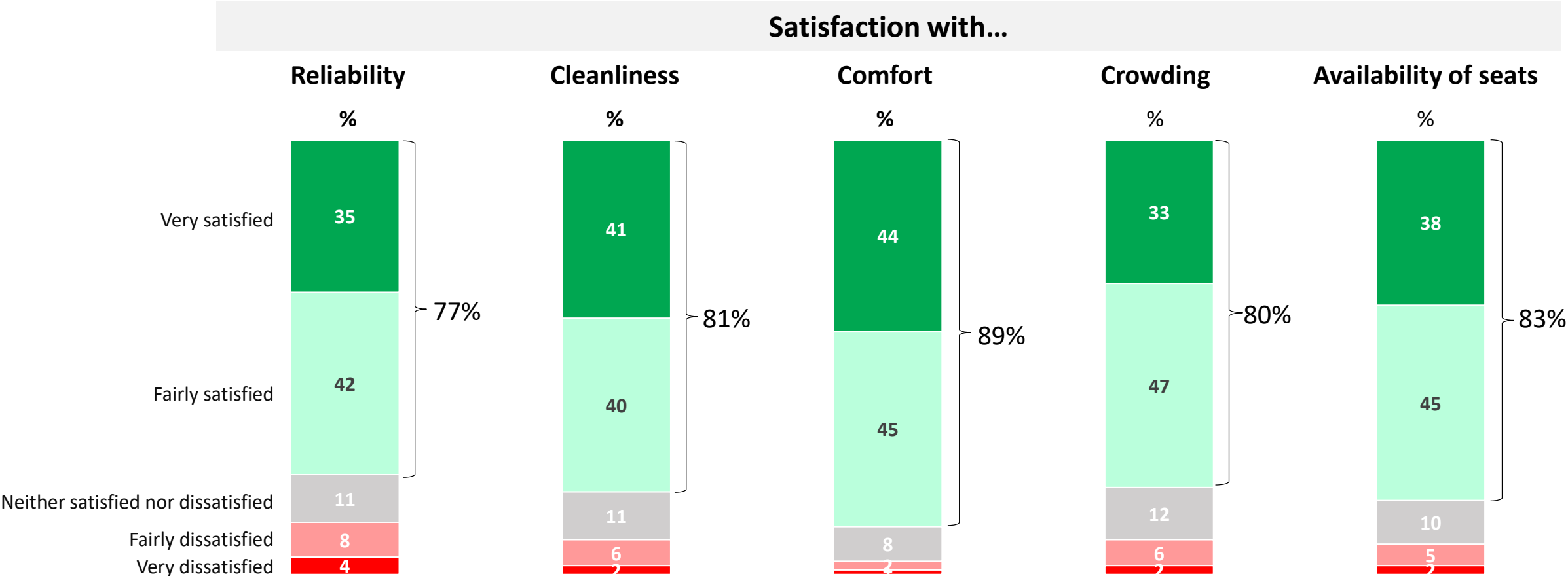
Satisfaction with key travel attributes: Rail rates lowest on cleanliness. Bus scores highly on crowding and availability of seats with Tram lower on these measures.

Base: All users- Very and fairly satisfied scores

	TOTAL	Bus	Rail	Tram
Base:	*6,069*	*3,944*	*1,514*	*611*
	%	%	%	%
Reliability (very+ fairly satisfied)	77	72	87	92
Cleanliness (very+ fairly satisfied)	81	84	74	85
Comfort (very+ fairly satisfied)	89	91	86	88
Crowding (very+ fairly satisfied)	80	85	77	62
Availability of seats (very+ fairly satisfied)	83	88	79	61

4.1   Reliability of the service

Reliability: satisfaction with reliability decreases for Rail from 2021 although overall satisfaction remains high at 87%.Satisfaction with reliability is lower for Bus.

Base: All Public Transport users N= 6,069

			TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
			6,069 %	3,944 %	1,514 %	611 %
Very satisfied			35	31	41	48
Fairly satisfied			42	41	46	44
Somewhat satisfied			11	13	8	4
Not very satisfied			8	10	4	3
Not at all satisfied			4	5	1	
Very + fairly satisfied	2022	%	77	72	87 (-7)	92 (+1)
Very + Fairly Satisfied	2021	%	n/a	n/a	94	91

() +/- vs. 2021

November 2022
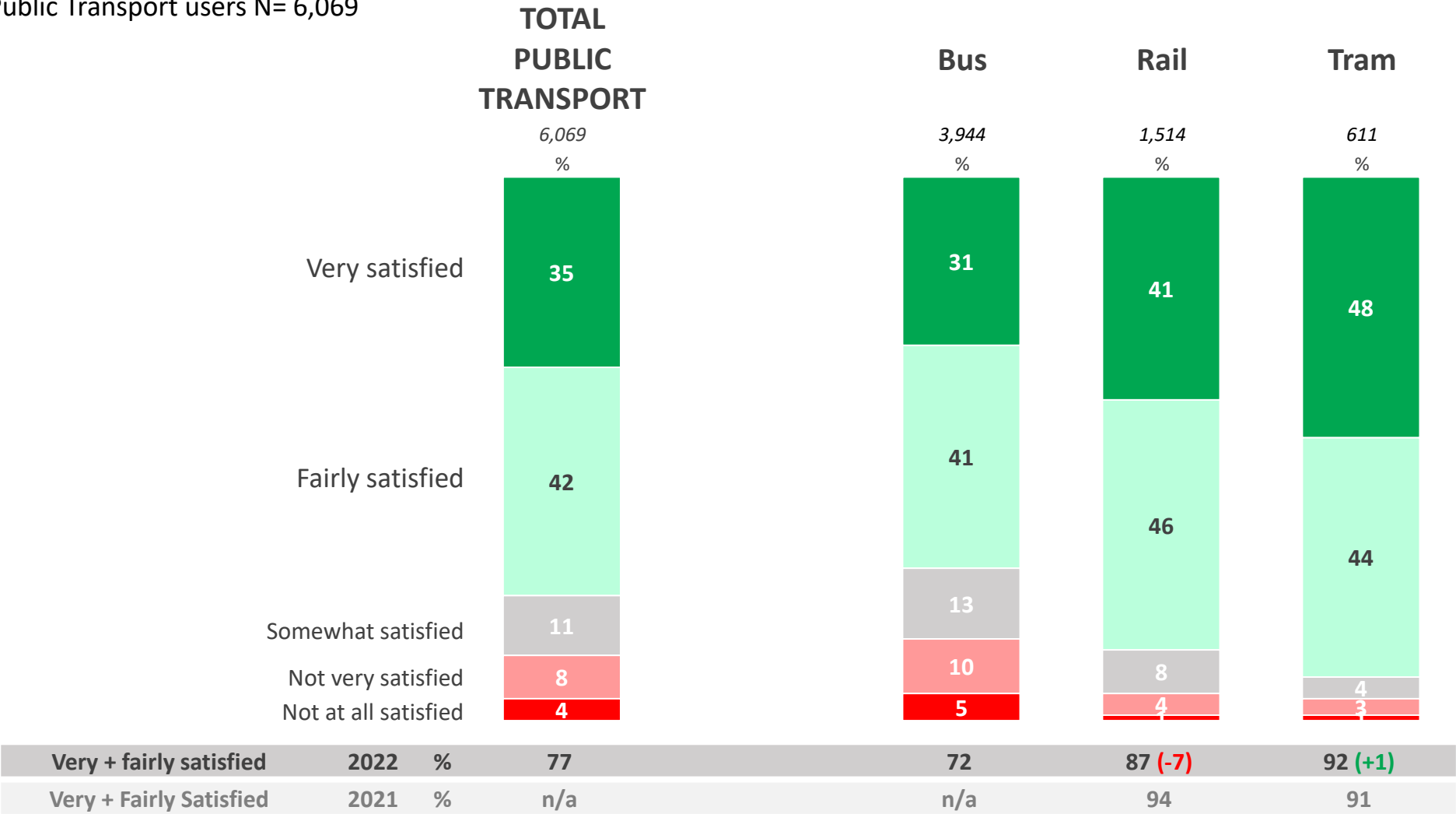
4.2 Cleanliness of the service

Cleanliness: Dissatisfaction with cleanliness is higher for Rail compared to Bus and Tram.

Base: All Public Transport users N= 6,069

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	6,069 %	3,944 %	1,514 %	611 %
Very satisfied	41	45	33	36
Fairly satisfied	40	39	41	49
Somewhat satisfied	11	9	15	10
Not very satisfied	6	6	8	4
Not at all satisfied	2	1	3	1
Very + fairly satisfied 2022 %	**81**	**84**	**74**	**85**
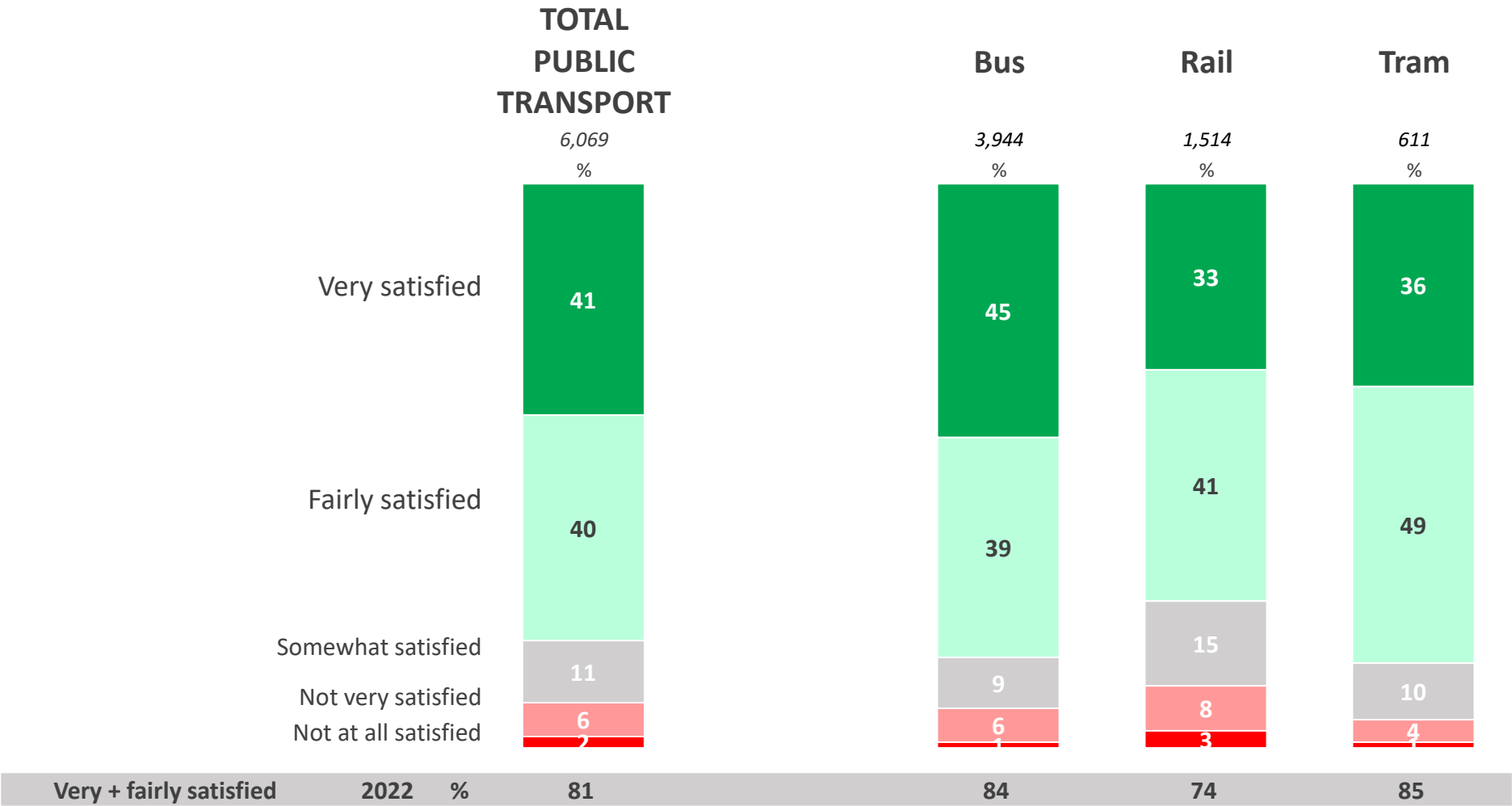
4.3   Comfort of the service

Comfort: Satisfaction with comfort on Rail decreases from 2021. The level of intensity of satisfaction, very satisfied, decreases for Rail and Tram.

Base: All Public Transport users N= 6,069

	Total	Bus	Rail			Tram		
	2022	**2022**	**2019**	**2021**	**2022**	**2019**	**2021**	**2022**
	6,069	*3,944*	*1,096*	*601*	*1,514*	*545*	*210*	*611*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Very satisfied	44	48	49	47	41	51	36	29
Fairly satisfied	45	43	40	47	45	38	50	59
Somewhat satisfied	8	6	5	4	10	6	13	9
Not very satisfied	2	2	3	4	3	4	0	2
Not at all satisfied			3			1		
Very + fairly satisfied %	**89**	**91**	**89**	**94**	**86 (-8)**	**89**	**86**	**88 (+2)**

() +/- vs. 2021

November 2022
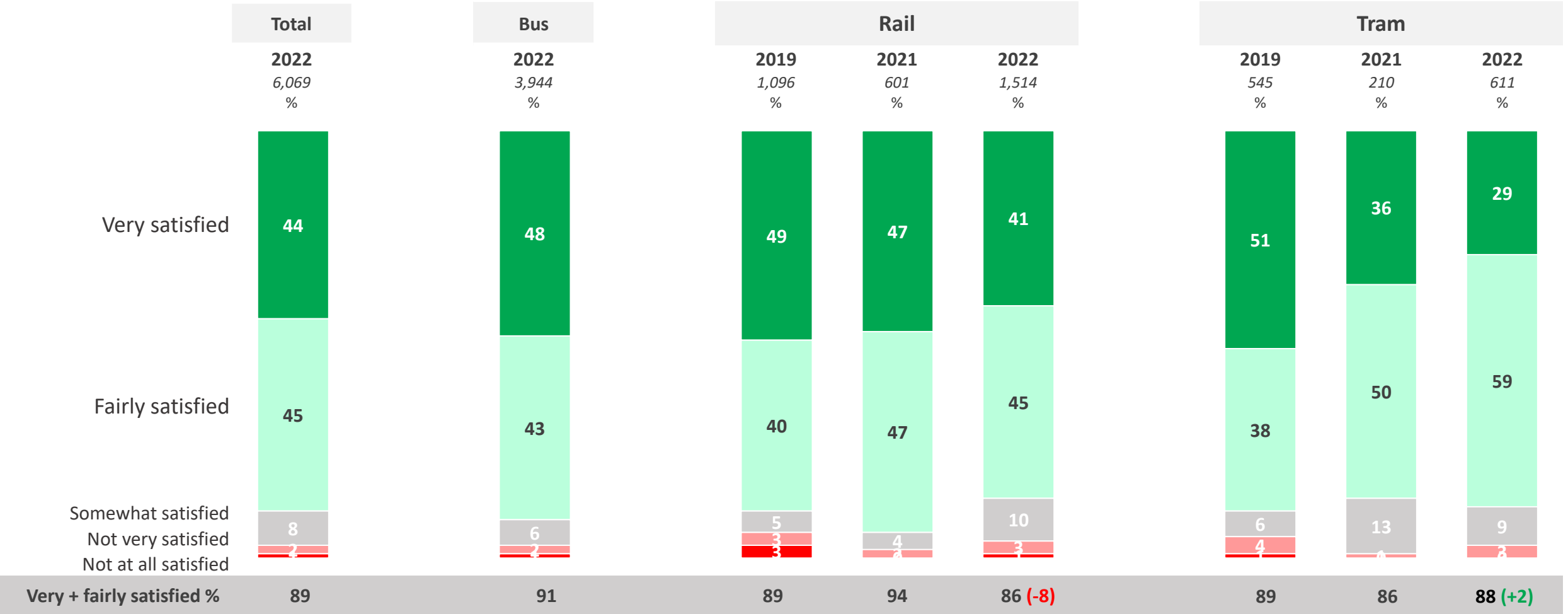
4.4   Crowding and availability of seats

Crowding: satisfaction with crowding is lower for Rail and especial for Tram in comparison to Bus.

Base: All Public Transport users N= 6,069
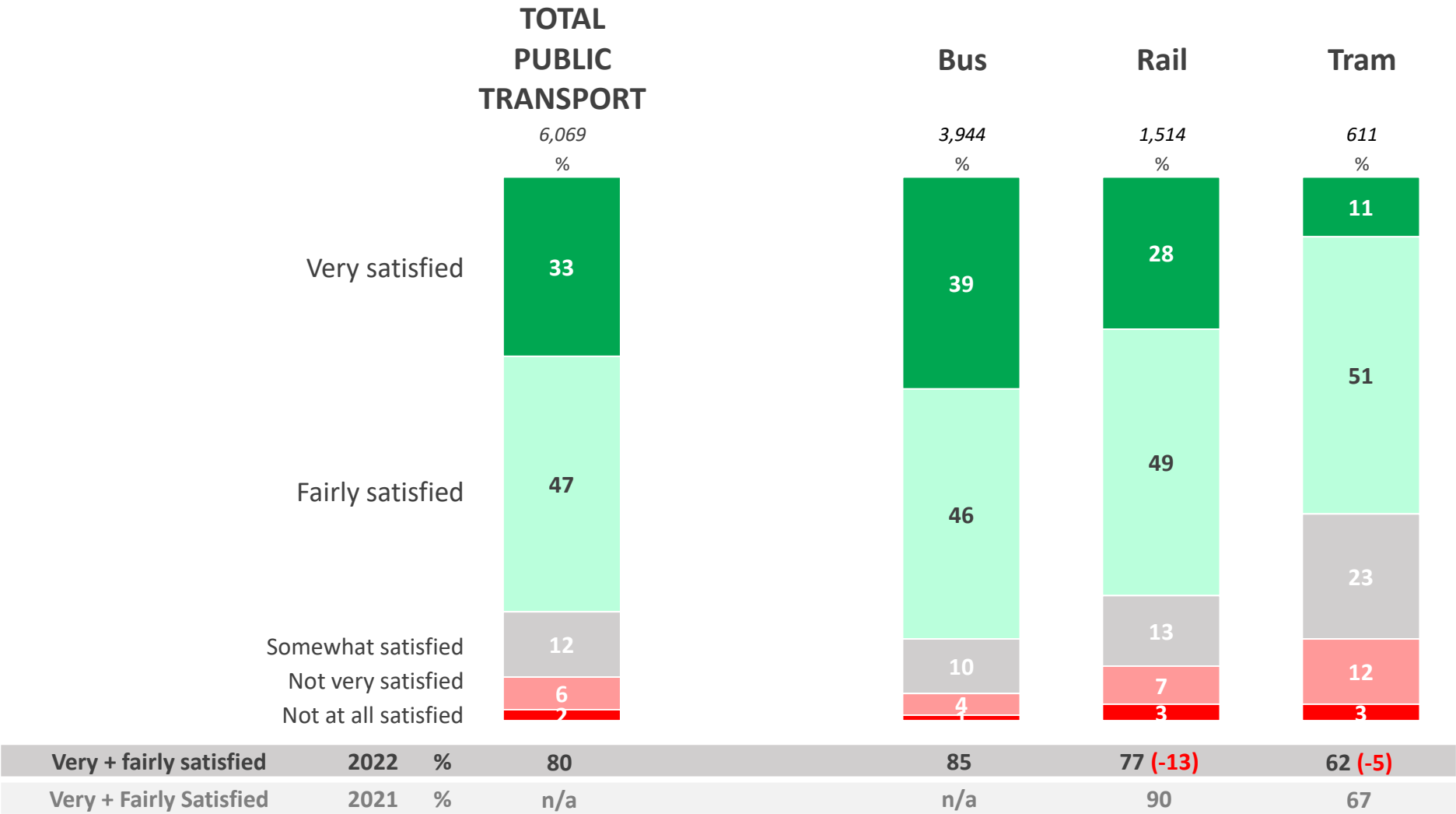
	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	6,069 %	3,944 %	1,514 %	611 %
Very satisfied	33	39	28	11
Fairly satisfied	47	46	49	51
Somewhat satisfied	12	10	13	23
Not very satisfied	6	4	7	12
Not at all satisfied	2	4	3	3

Very + fairly satisfied	2022	%	80	85	77 (-13)	62 (-5)
Very + Fairly Satisfied	2021	%	n/a	n/a	90	67

() +/- vs. 2021

November 2022

Availability of seats: satisfaction decreases for Rail and Tram. 88% are satisfied with the availability of seats on Bus.

Base: All Public Transport users N= 6,069

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	6,069 %	3,944 %	1,514 %	611 %
Very satisfied	38	45	32	12
Fairly satisfied	45	43	47	49
Somewhat satisfied	10	7	11	24
Not very satisfied	5	4	7	12
Not at all satisfied	2	1	3	3

Very + fairly satisfied	**2022**	**%**	**83**	**88**	**79 (-11)**	**61 (-14)**
Very + Fairly Satisfied	2021	%	n/a	n/a	90	75

() +/- vs. 2021

November 2022
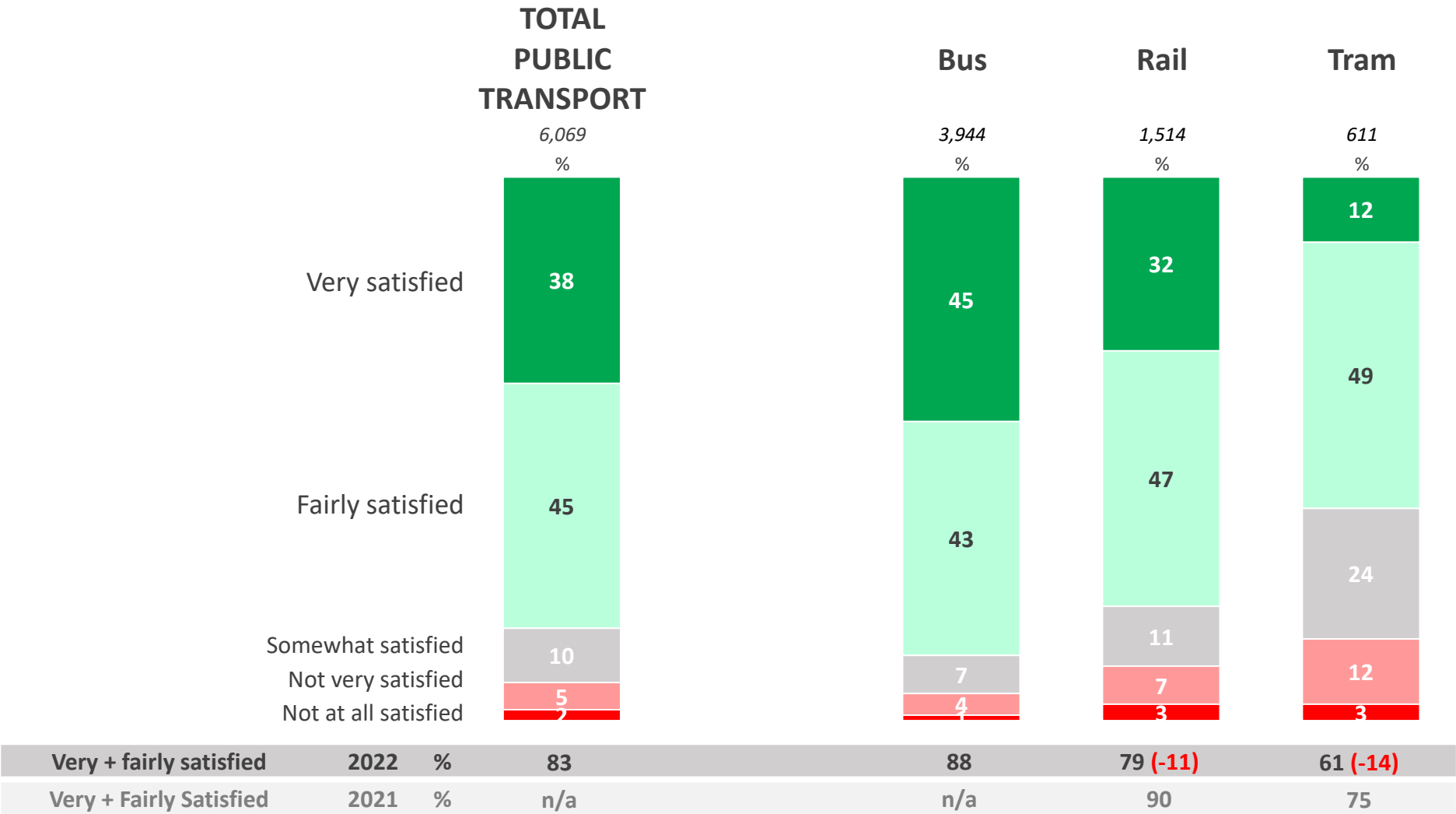
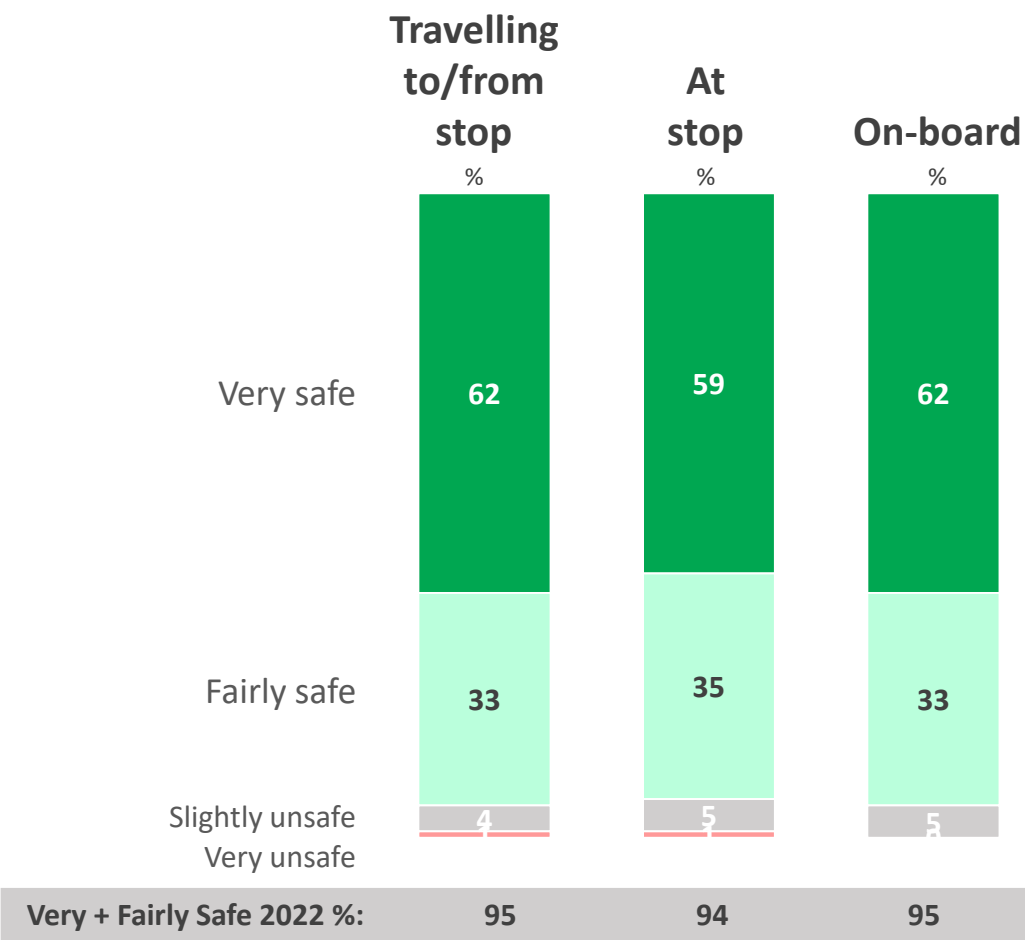# 5. Safety

Safety overall: feeling safe is high across all stages of the journey.

Base: All Public Transport users N= 6,069

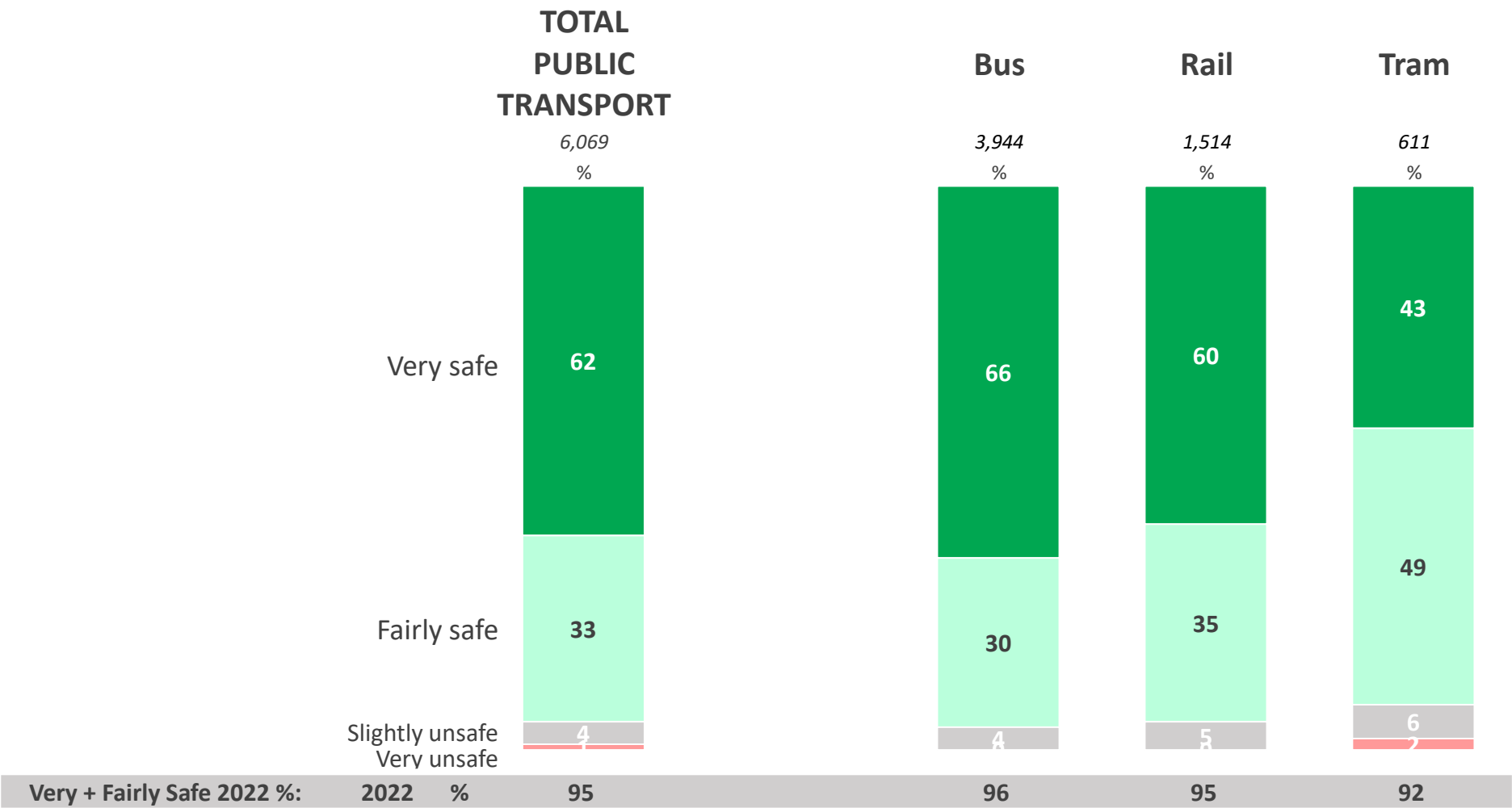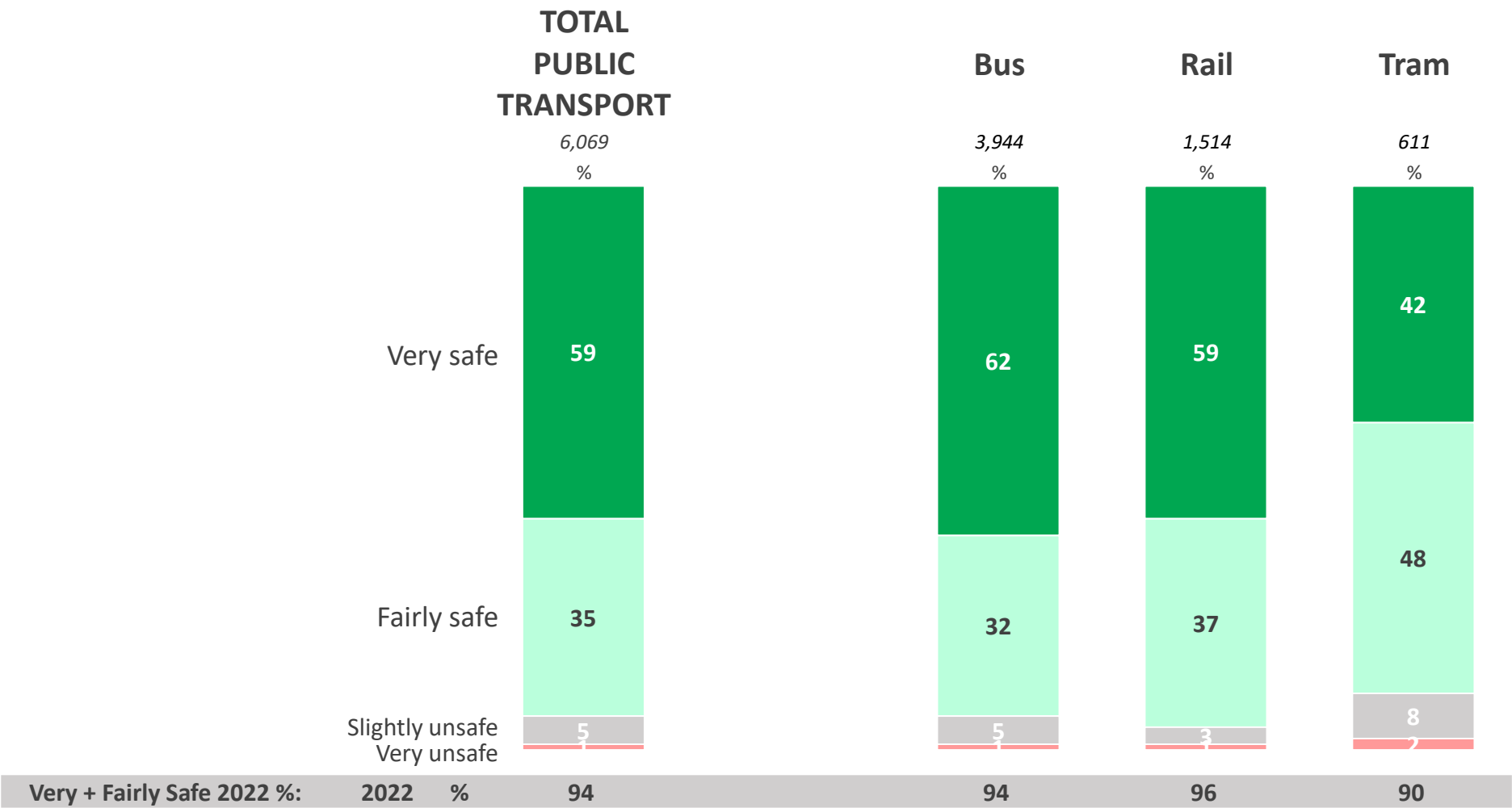|	Travelling to/from stop %	At stop %	On-board %
Very safe	62	59	62
Fairly safe	33	35	33
Slightly unsafe	4	5	5
Very unsafe			
Very + Fairly Safe 2022 %:	**95**	**94**	**95**

Note: Question not asked in 2021

Safety walking to and from the stop: Across transport modes the great majority feel very or fairly safe.

Base: All Public Transport users N= 6,069

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	6,069 %	3,944 %	1,514 %	611 %
Very safe	62	66	60	43
Fairly safe	33	30	35	49
Slightly unsafe	4	4	5	6
Very unsafe	1			2
Very + Fairly Safe 2022 %: 2022 %	95	96	95	92

Note: Question not asked in 2021

November 2022

Safety at the stop: Overall it is high across modes. Feeling very safe is lower for Tram.

Base: All Public Transport users N= 6,069

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	6,069 %	3,944 %	1,514 %	611 %
Very safe	59	62	59	42
Fairly safe	35	32	37	48
Slightly unsafe	5	5	3	8
Very unsafe	1	1		2
Very + Fairly Safe 2022 %: 2022 %	94	94	96	90

Note: Question not asked in 2021

November 2022

Safety on board: Across transport modes the great majority feel very or fairly safe. Feeling very safe is lower for Tram.

Base: All Public Transport users N= 6,069

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	6,069 %	3,944 %	1,514 %	611 %
Very safe	62	67	59	39
Fairly safe	33	30	36	48
Slightly unsafe Very unsafe	5	3	5	11 / 2
Very + Fairly Safe 2022 %: 2022 %	95	97	95	87

Note: Question not asked in 2021

November 2022

Safety walking to and from the stop by gender: While overall feelings of safety are high, fewer women feel very safe compared to men when walking to/from the stop across modes.
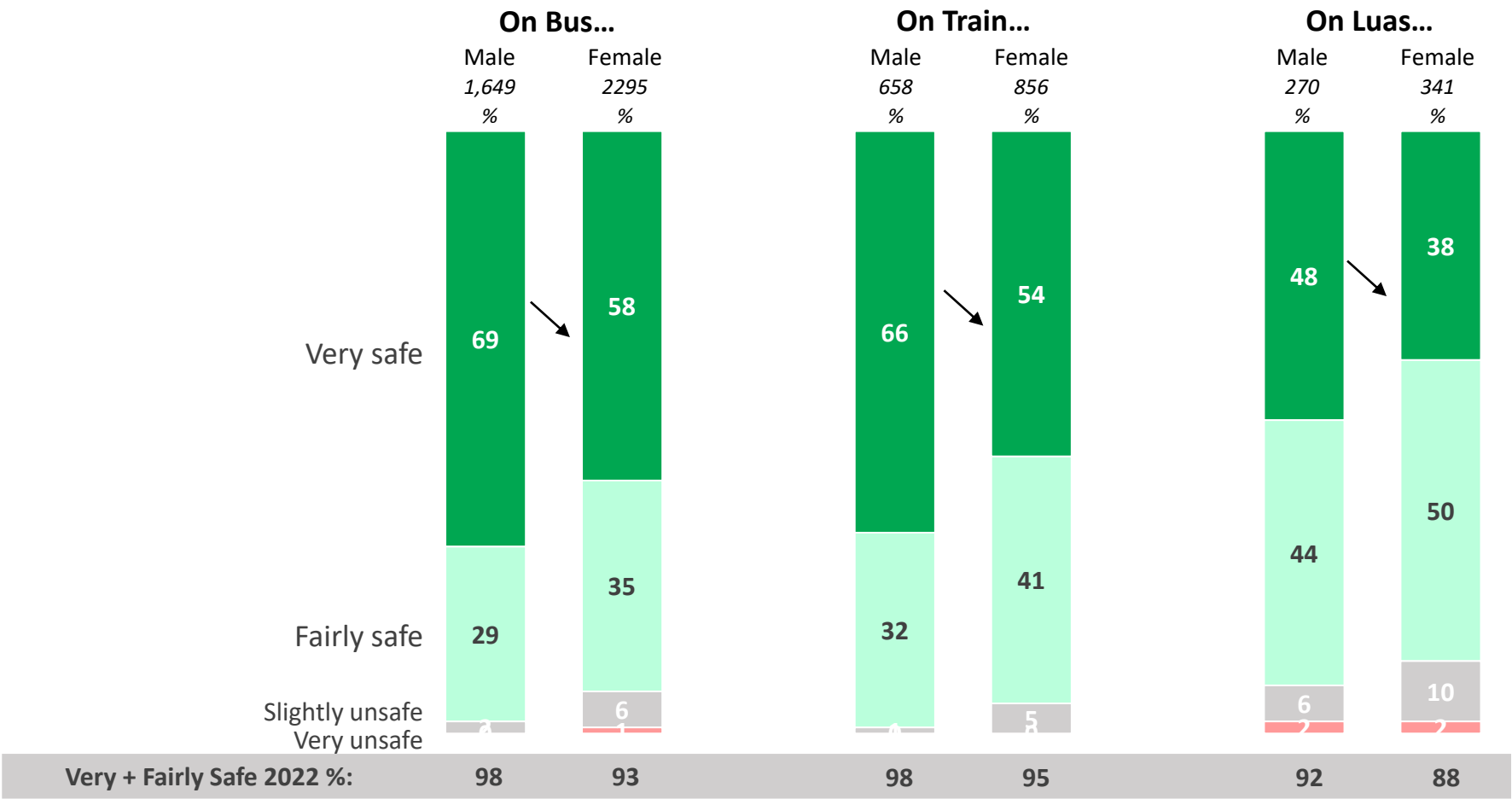
Base: All Public Transport users N= 6,069

On Bus...

	Male 1,649 %	Female 2295 %
Very safe	72	61
Fairly safe	26	33
Slightly unsafe	2	5
Very unsafe		1

On Train...

	Male 658 %	Female 856 %
Very safe	68	55
Fairly safe	30	38
Slightly unsafe	2	6
Very unsafe		1

On Luas...

	Male 270 %	Female 341 %
Very safe	49	38
Fairly safe	46	52
Slightly unsafe	3	8
Very unsafe	2	2

Very + Fairly Safe 2022 %:	98	94		98	93		95	90

Note: Question not asked in 2021

November 2022
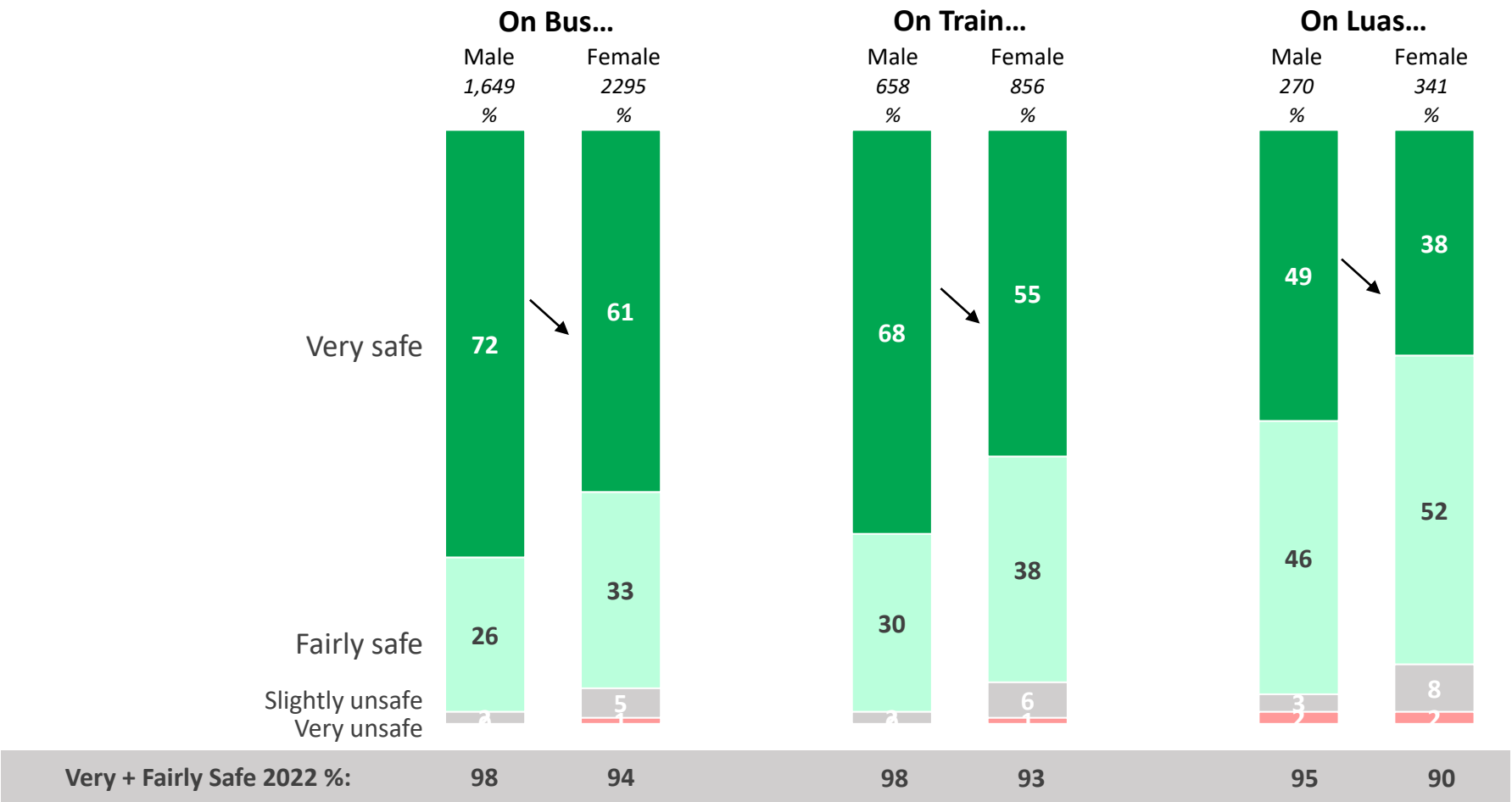
Safety at the stop by gender: Consistent with the level of safety felt walking to/from the stop, women are less likely to feel very safe at the stop/station compared to men.
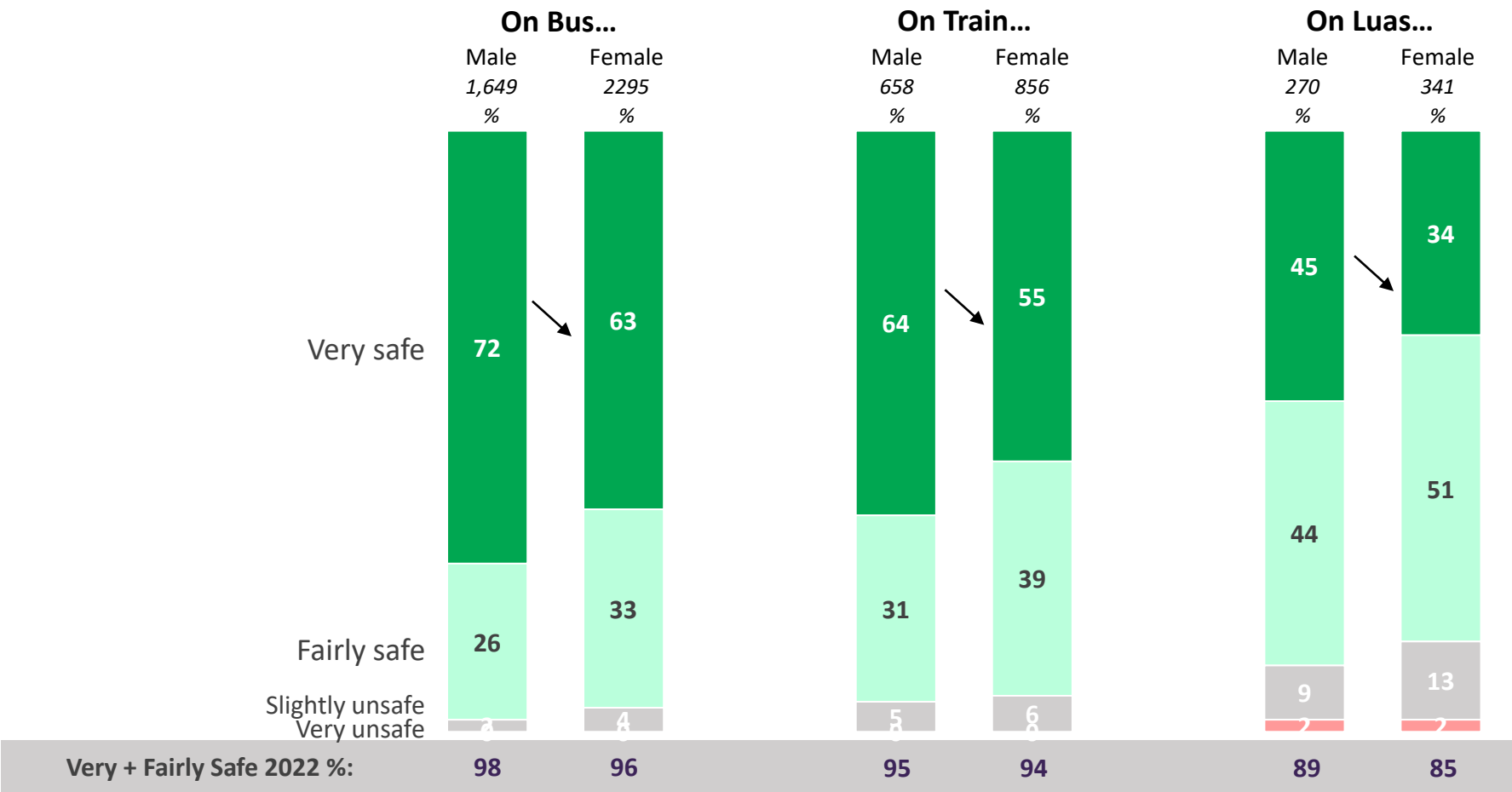
Base: All Public Transport users N= 6,069

	On Bus...		On Train...		On Luas...	
	Male 1,649 %	Female 2295 %	Male 658 %	Female 856 %	Male 270 %	Female 341 %
Very safe	69	58	66	54	48	38
Fairly safe	29	35	32	41	44	50
Slightly unsafe		6		5	6	10
Very unsafe						
Very + Fairly Safe 2022 %:	**98**	**93**	**98**	**95**	**92**	**88**

Note: Question not asked in 2021

Safety on board by gender: Consistent with other elements of the transport journey, women are less likely to feel safe in comparison to men onboard the mode.

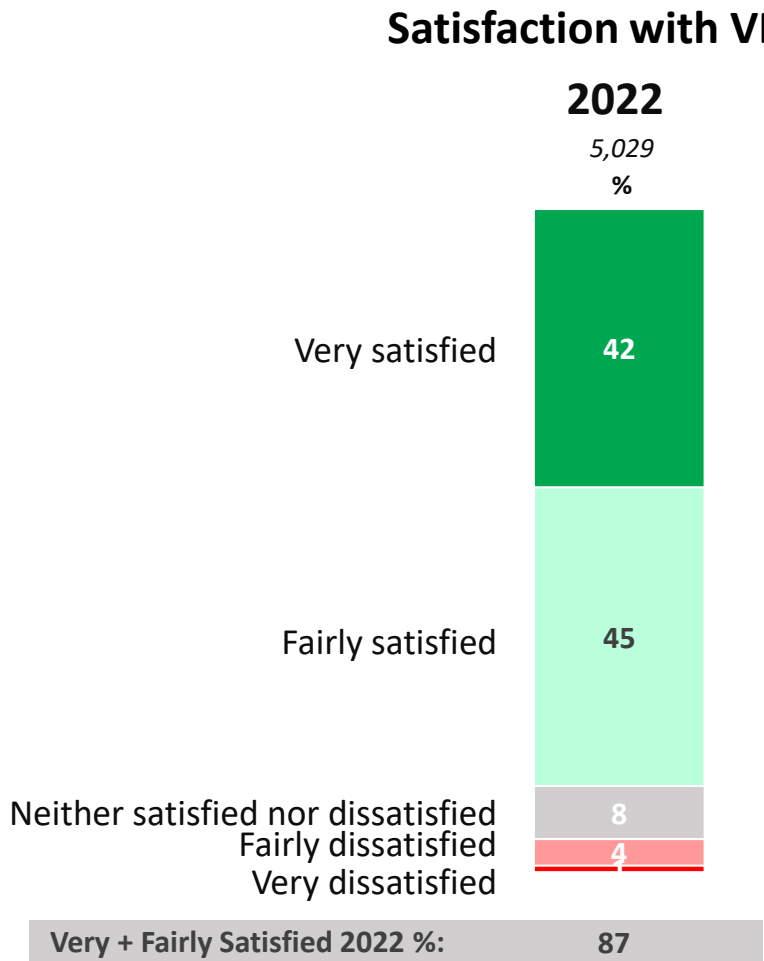Base: All Public Transport users N= 6,069

On Bus…

	Male 1,649 %	Female 2295 %
Very safe	72	63
Fairly safe	26	33
Slightly unsafe / Very unsafe		

On Train…

	Male 658 %	Female 856 %
Very safe	64	55
Fairly safe	31	39

On Luas…

	Male 270 %	Female 341 %
Very safe	45	34
Fairly safe	44	51
Slightly unsafe	9	13

Very + Fairly Safe 2022 %:

On Bus Male	On Bus Female	On Train Male	On Train Female	On Luas Male	On Luas Female
98	96	95	94	89	85

Note: Question not asked in 2021
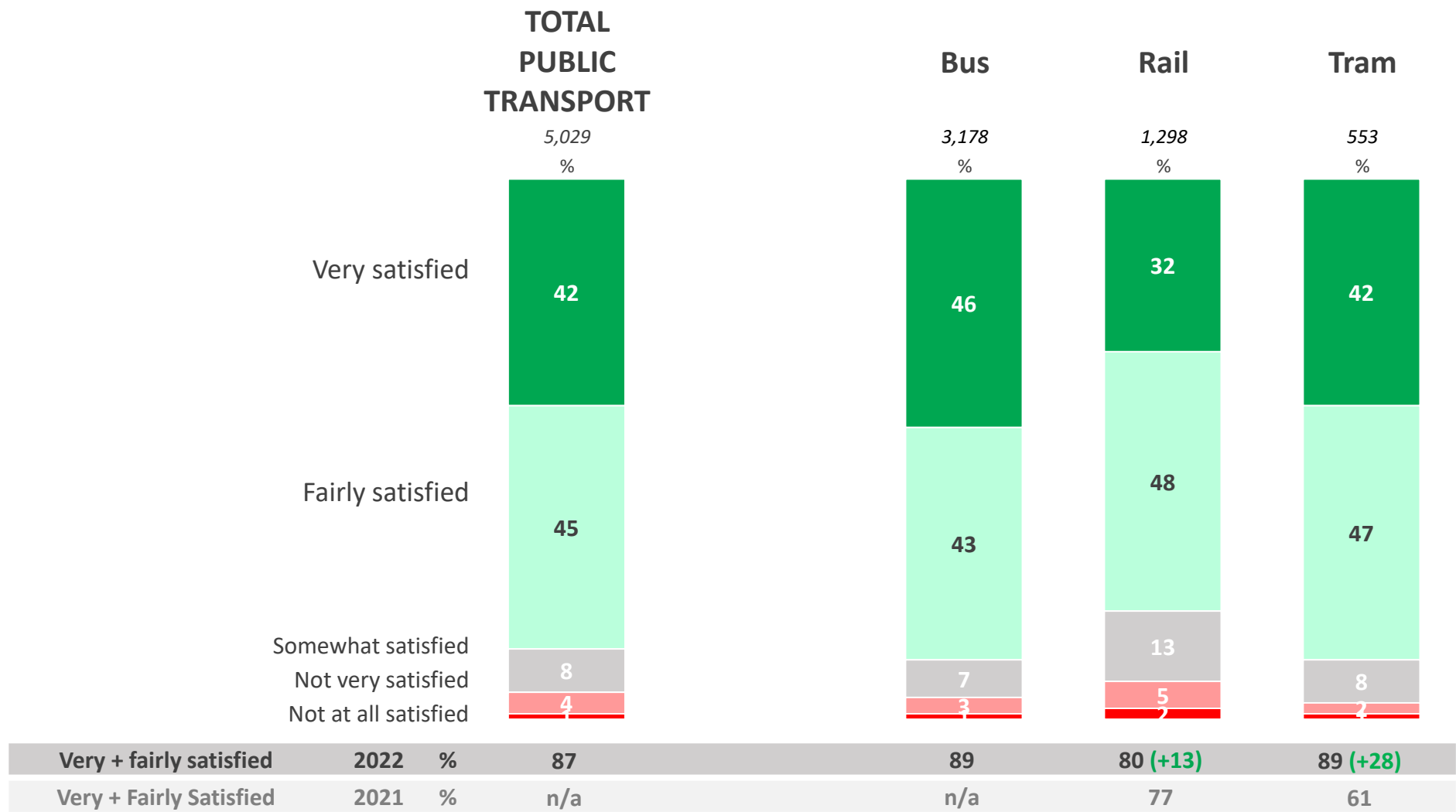
November 2022

6. Ticketing

Value for money (VFM): Almost nine in ten are very or fairly satisfied with value for money.

Base: All public transport users ex those with free travel pass N= 5,029

Satisfaction with VFM

2022

5,029
%

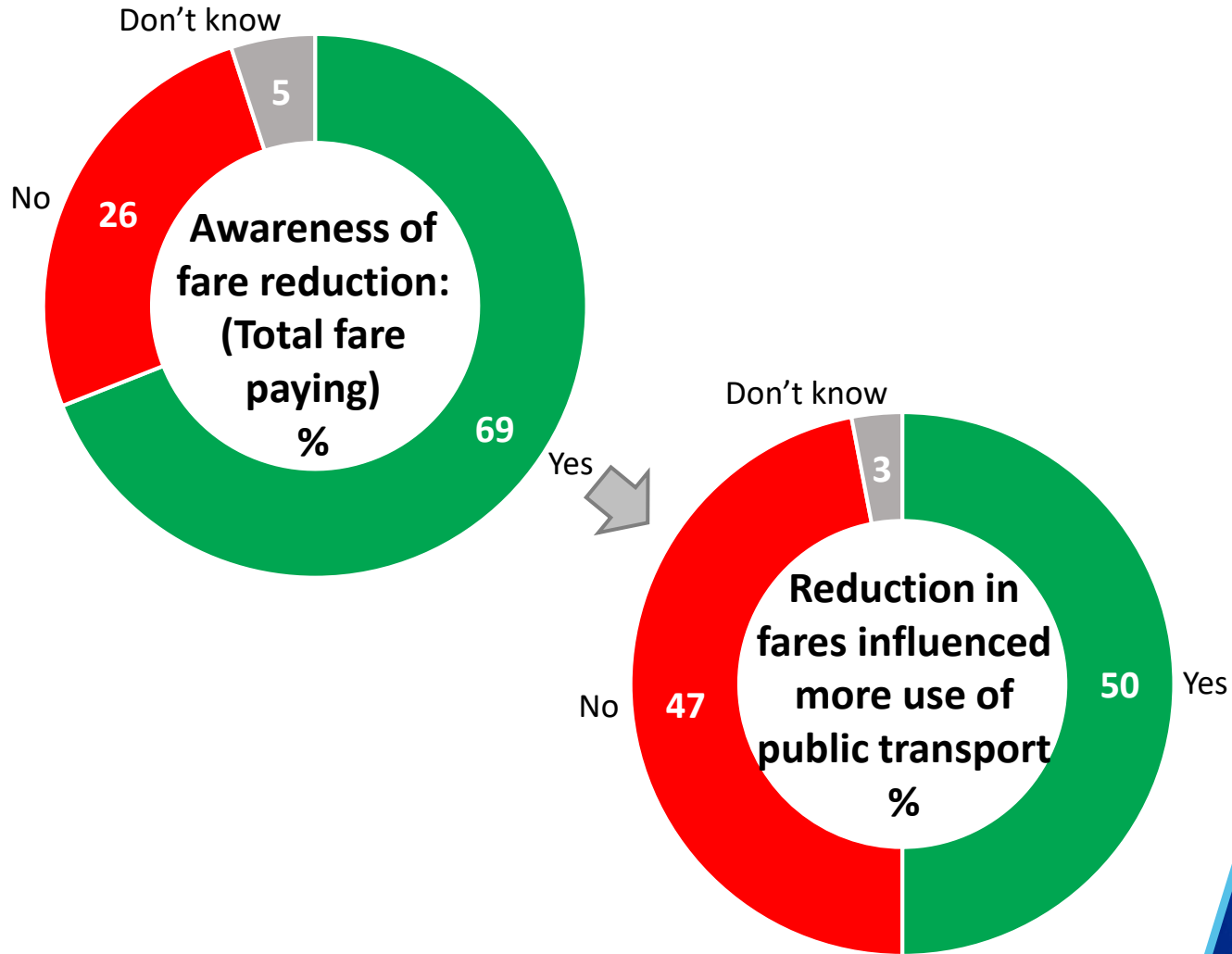|	
Very satisfied	42
Fairly satisfied	45
Neither satisfied nor dissatisfied	8
Fairly dissatisfied	4
Very dissatisfied	1
Very + Fairly Satisfied 2022 %:	**87**

Value for money (VFM) by mode: Value perceptions have increased for Rail and even more so for Tram.

Base: All public transport users ex those with free travel pass N= 5,029

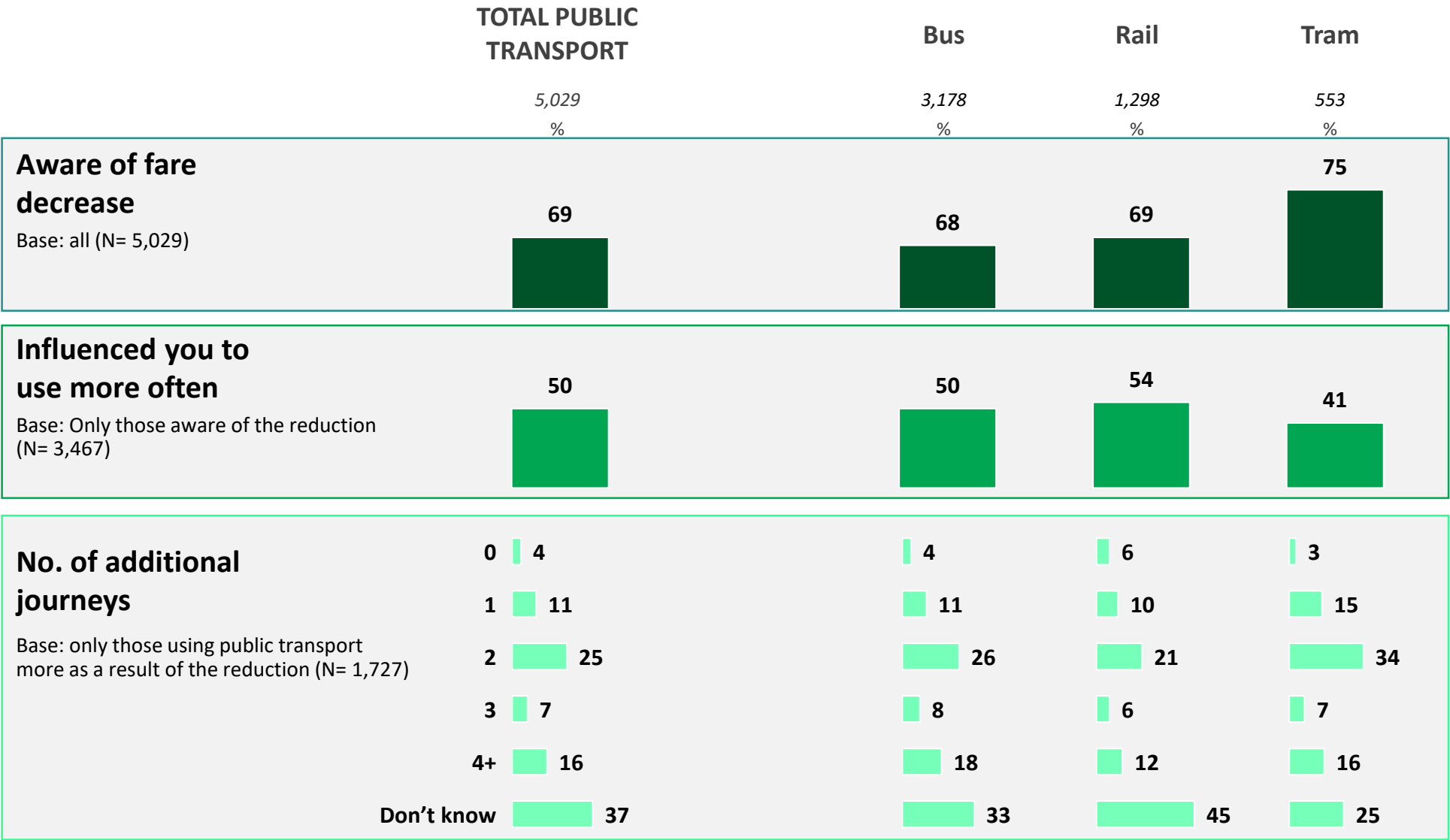|			TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
			5,029 %	3,178 %	1,298 %	553 %
Very satisfied			42	46	32	42
Fairly satisfied			45	43	48	47
Somewhat satisfied			8	7	13	8
Not very satisfied					5	
Not at all satisfied			4	3	2	2
Very + fairly satisfied	**2022**	**%**	87	89	80 (+13)	89 (+28)
Very + Fairly Satisfied	2021	%	n/a	n/a	77	61

() +/- vs. 2021

November 2022

Fare reduction and its influence: The fares reduction has been noticed and is reported as influencing increased travel.

Base: All public transport users ex those with free travel pass N= 5,029

Don't know

Awareness of fare reduction: (Total fare paying) %

No 26

5

69 Yes

Don't know

Reduction in fares influenced more use of public transport %

No 47

3

50 Yes

Tickets

Fare reduction by modes: Awareness is highest amongst Tram users although influence to travel more often is strongest for Rail.

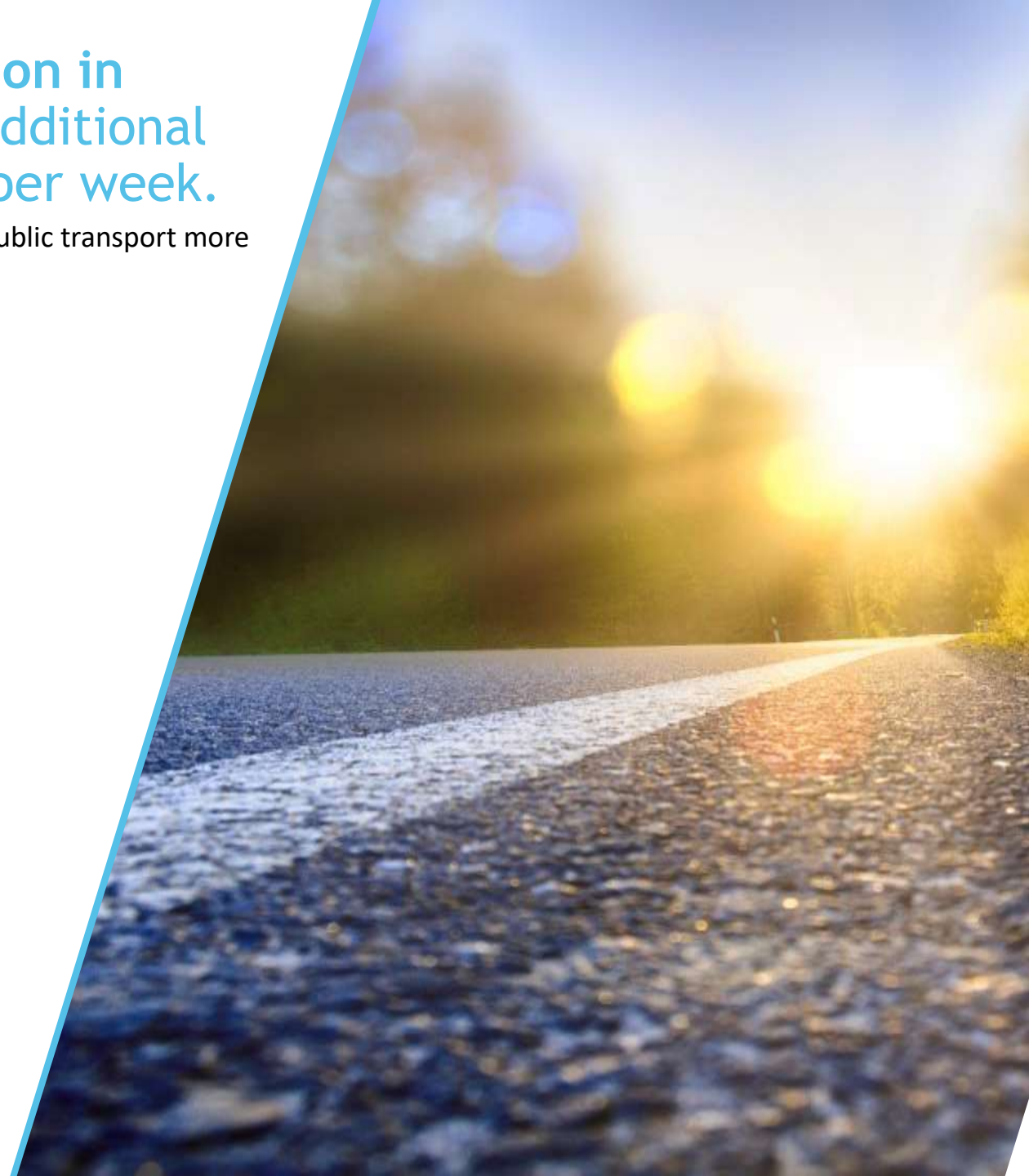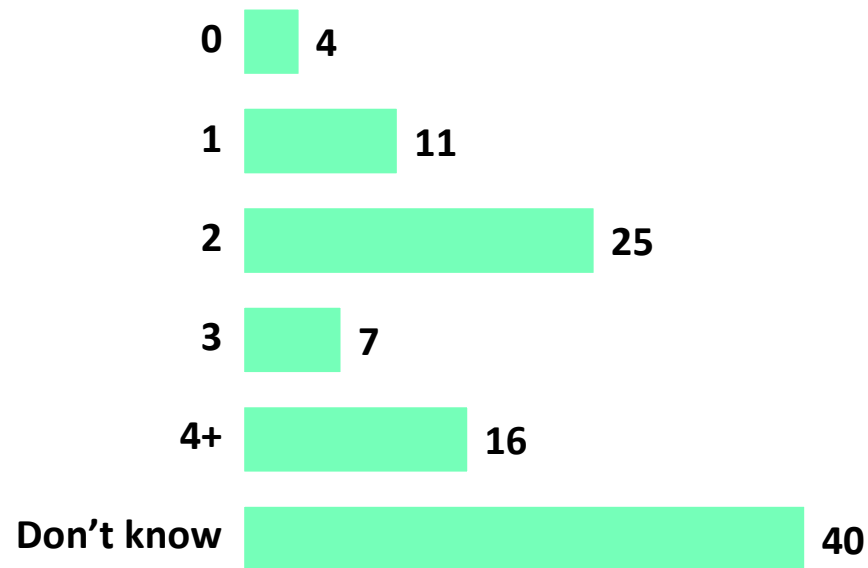Base: All public transport users excluding those with free travel pass (N=5,029)

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	5,029 %	*3,178* %	*1,298* %	*553* %

Aware of fare decrease
Base: all (N= 5,029)

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	69	68	69	75

Influenced you to use more often
Base: Only those aware of the reduction (N= 3,467)

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	50	50	54	41

No. of additional journeys
Base: only those using public transport more as a result of the reduction (N= 1,727)

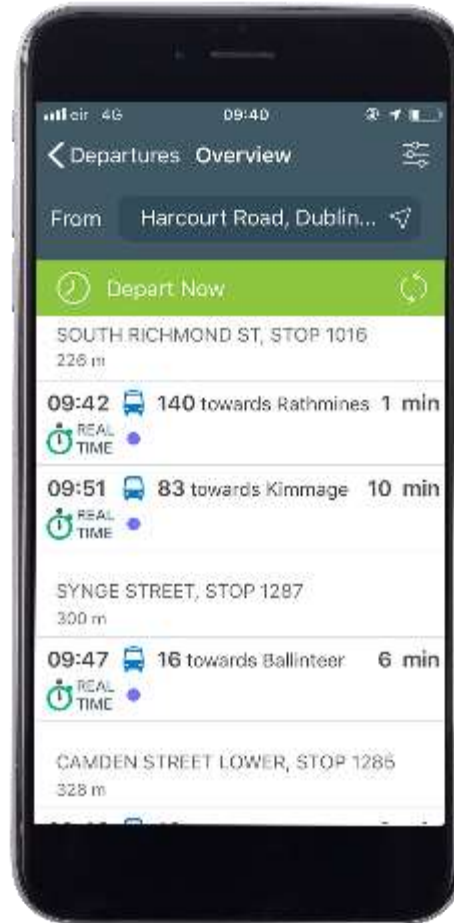|	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
0	4	4	6	3
1	11	11	10	15
2	25	26	21	34
3	7	8	6	7
4+	16	18	12	16
Don't know	37	33	45	25

Extra journeys as a result of the reduction in fares: One quarter of the people taking additional trips report they are taking 2 extra trips per week.

Base: All public transport users ex those with free travel pass who are using public transport more as a result of the reduction N= 1,727

Number of extra journeys taken in a typical week: Total fare paying

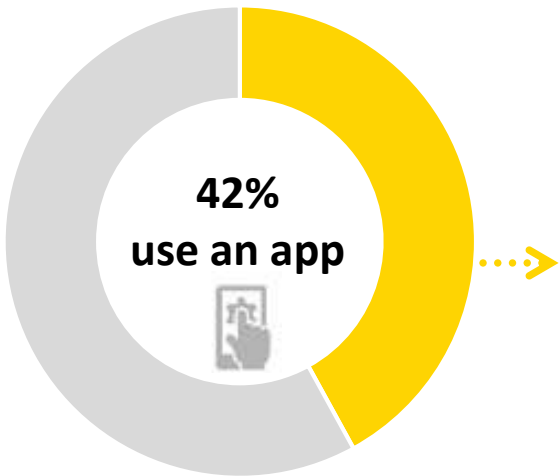|	
0	4
1	11
2	25
3	7
4+	16
Don't know	40

7. Transport apps and real time information

Use of Apps: 42% use an App to get real time/live/journey planning information with TFI Real Time most popular.
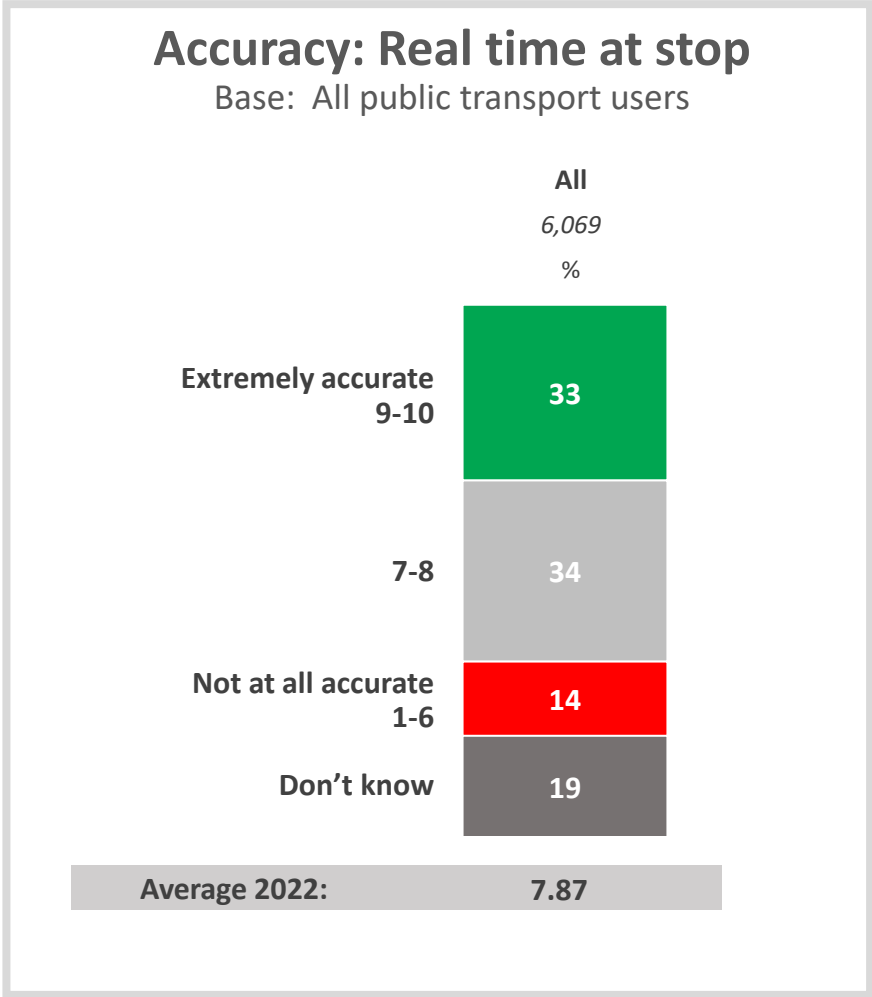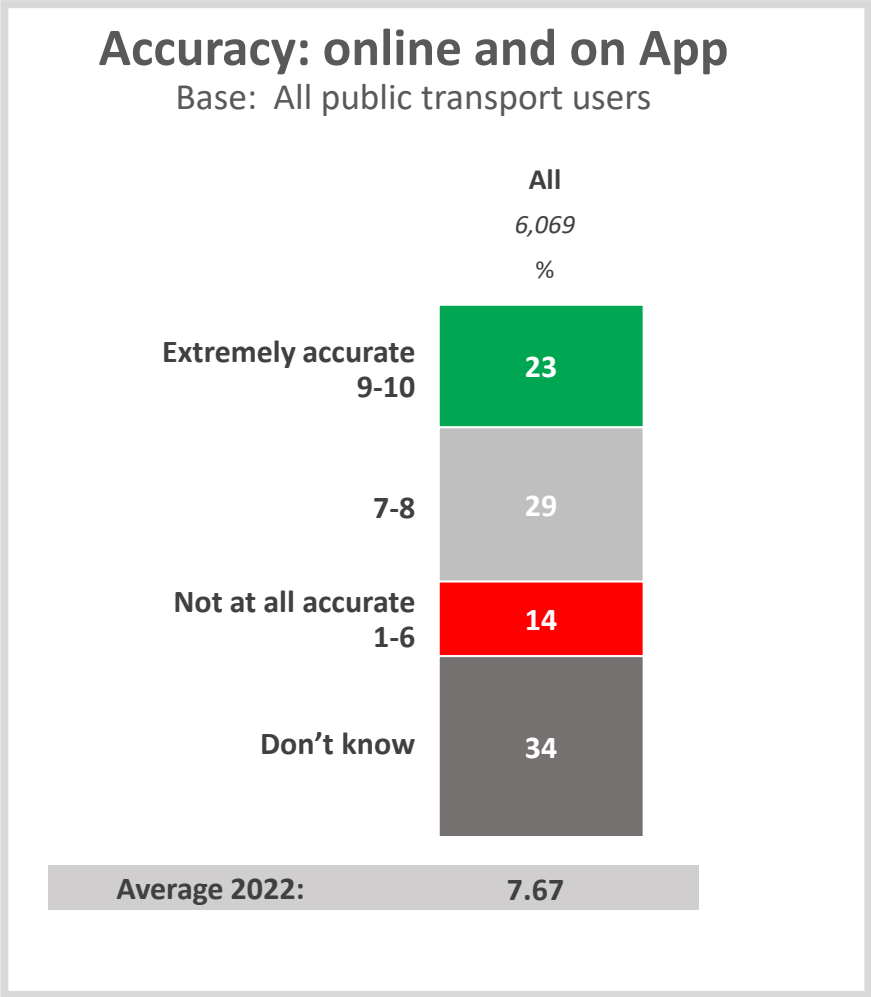
Base: All Public Transport users N= 6,069

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
Base:	6,069	3,944	1,514	611
	%	%	%	%
TFI Real Time Ireland	14	18	6	6
Dublin Bus Official	6	9	-	-
Online/Google	6	6	8	4
Irish Rail Official	5	0	18	-
Luas Official	1	-	-	12
Bus Eireann website/App	1	2	0	-
Journey Planner	1	1	0	0
Moovit	1	1	0	0
Leap card app	1	1	0	0
Other	1	1	1	0
DK	5	6	5	1

42% use an app

Accuracy of online and Apps vs. Real time at stop: Real time at stop accuracy rated better.

Base: All Public Transport users N= 6,069

Accuracy: online and on App
Base: All public transport users

All

6,069

%

Extremely accurate 9-10	23
7-8	29
Not at all accurate 1-6	14
Don't know	34

Average 2022:	7.67

Accuracy: Real time at stop
Base: All public transport users

All

6,069

%

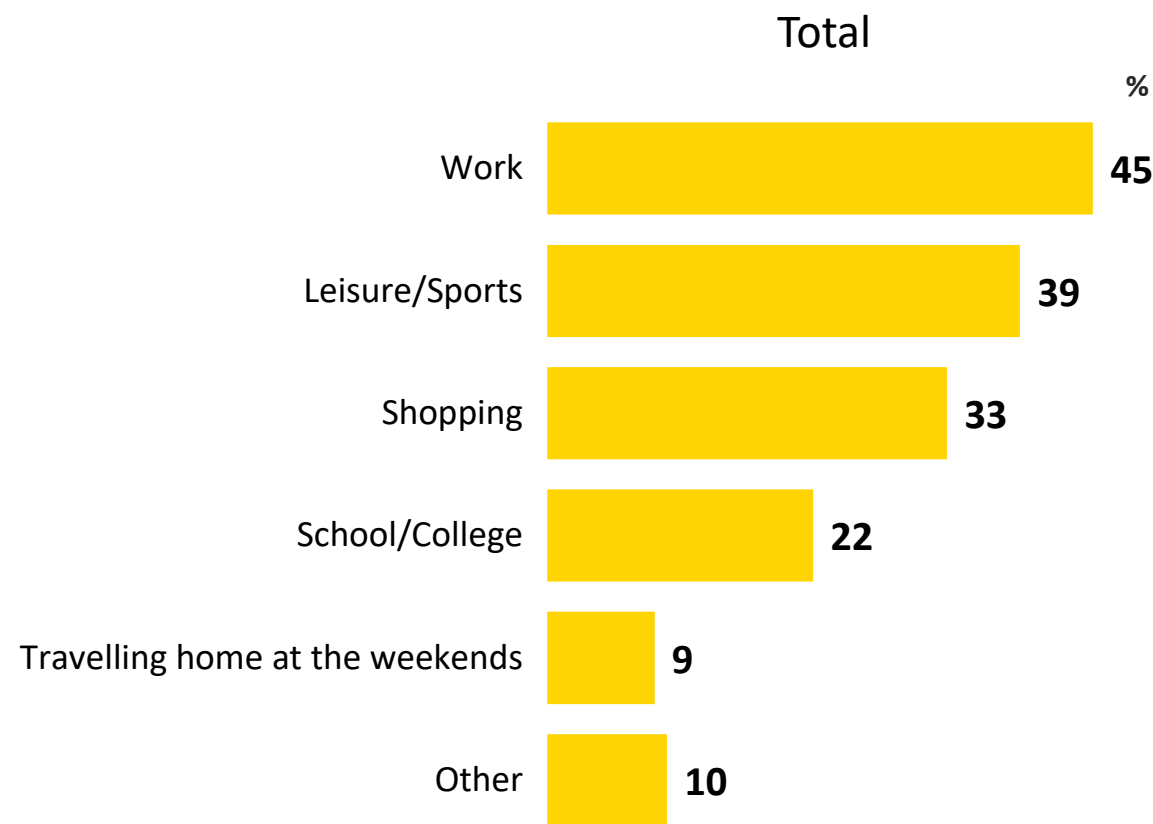|	
Extremely accurate 9-10	33
7-8	34
Not at all accurate 1-6	14
Don't know	19

Average 2022:	7.87

8. Usage norms

Usage: Work, leisure and shopping are the key reasons for public transport usage.

Base: All Public Transport users N= 6,069

Total

	Work	Leisure/Sports	Shopping	School/College	Travelling home at the weekends	Other
%	45	39	33	22	9	10

	Bus	Rail	Tram
	3,944	1,514	611
	%	%	%
	44	44	57
	40	36	39
	41	13	31
	23	21	21
	8	12	5
	10	12	6

9.   Suggested areas for improvement

Suggested areas for improvement: Punctuality and frequency dominate suggestions with Tram users also suggesting more security.

Base: All specified areas for improvement N= 2,753

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
Base: All specified areas for improvement – 2,753	*2,753*	*1,803*	*678*	*272*
	%	%	%	%
Improve punctuality	**17**	**23**	6	6
Improve frequency of buses/luas/train	13	16	6	8
More trains/buses - late night and weekends/peak times	12	9	**17**	**19**
More security	6	2	9	**27**
Improve cleanliness	6	5	11	3
Improve accuracy of Real Time signs	4	5	1	1
Cheaper fares	4	3	6	4
More routes	4	5	1	6
Improve overcrowding	3	1	6	10
Resume catering service	3	0	10	0
More/improved shelters	3	5	0	0
Improve Wifi	2	1	2	3
Improve seating/leg room	2	2	4	1
Less cancelled buses/trains	2	3	0	-
Specific routes named for improving	2	2	0	-
Other (all 1% or less)	20	21	26	14

November 2022

Thank you.

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Delve Deeper