

TFI Customer Satisfaction 2023

On location survey



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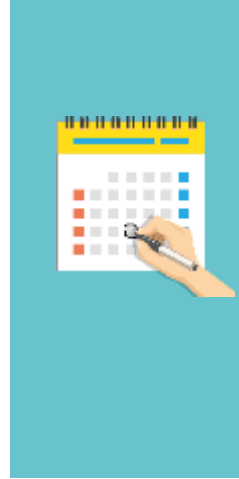


1. Research objectives and methodology



Objective:

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



Fieldwork dates:

2023:

Wave 1 4th July – 2nd August

Wave 2 28th September – 2nd November

2022:

Wave 1 7th July - 8th August;

Wave 2 26th September – 31st October

2021:

20th September – 3rd November

2019:

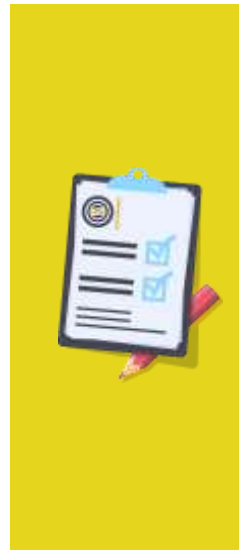
Wave 1 13th June – 6th July

Wave 2 8th September – 1st October



No. of interviews by operator:

	2023	MOE @95% CL	2022	2021
Bus Éireann	1614	+/-3%	1632	800
Dublin Bus	934	+/-5%	912	398
Go Ahead Dublin	606	+/-6%	603	198
Go Ahead Kildare	205	+/-10%	210	0
Kilkenny Buses	200	+/-10%	200	102
TFI local link	413	+/-7%	387	0
Irish Rail	906	+/-6%	902	401
Irish Rail DART	622	+/-6%	612	200
LUAS	605	+/-6%	611	210
Total	6,105	+/-2%	6,069	2,513*



Sampling:

Face-to-face interviews undertaken on location.

Total sample size

2023 = 6,105

2022 = 6,069

2021 = 2,513

2019 = 5,015

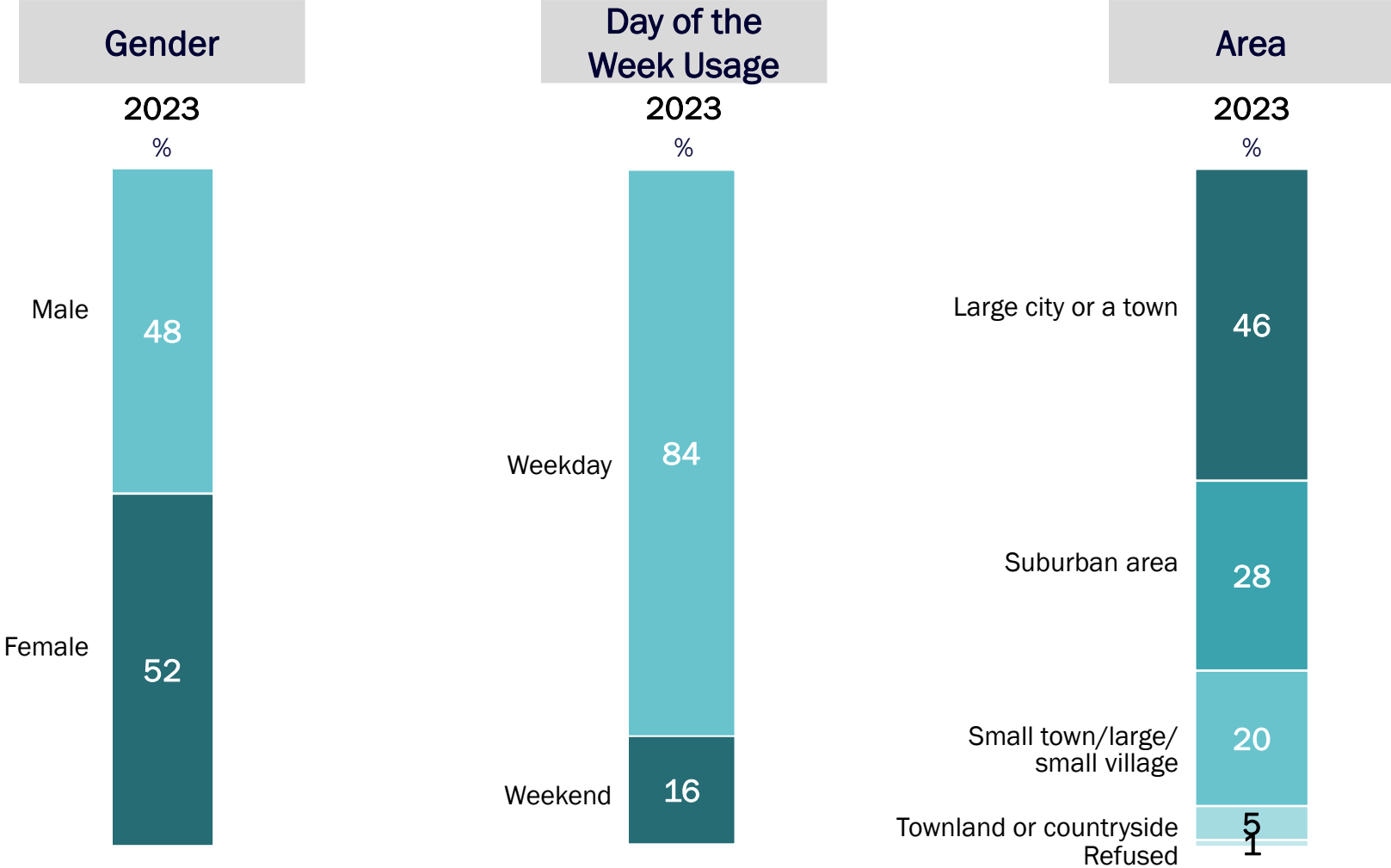
Quotas applied at the operator level. No attempt made to weight data to trip volumes.

Sample structure changed in 2022 making year on year comparisons on the total sample only possible from this year onward.

Profile of Sample:

Sample interviewed comprises equal number of male and females, mostly from large city or town or suburban areas. Weekday public transports users dominate.

Base: All Public Transport users N= 6,105 in 2023,



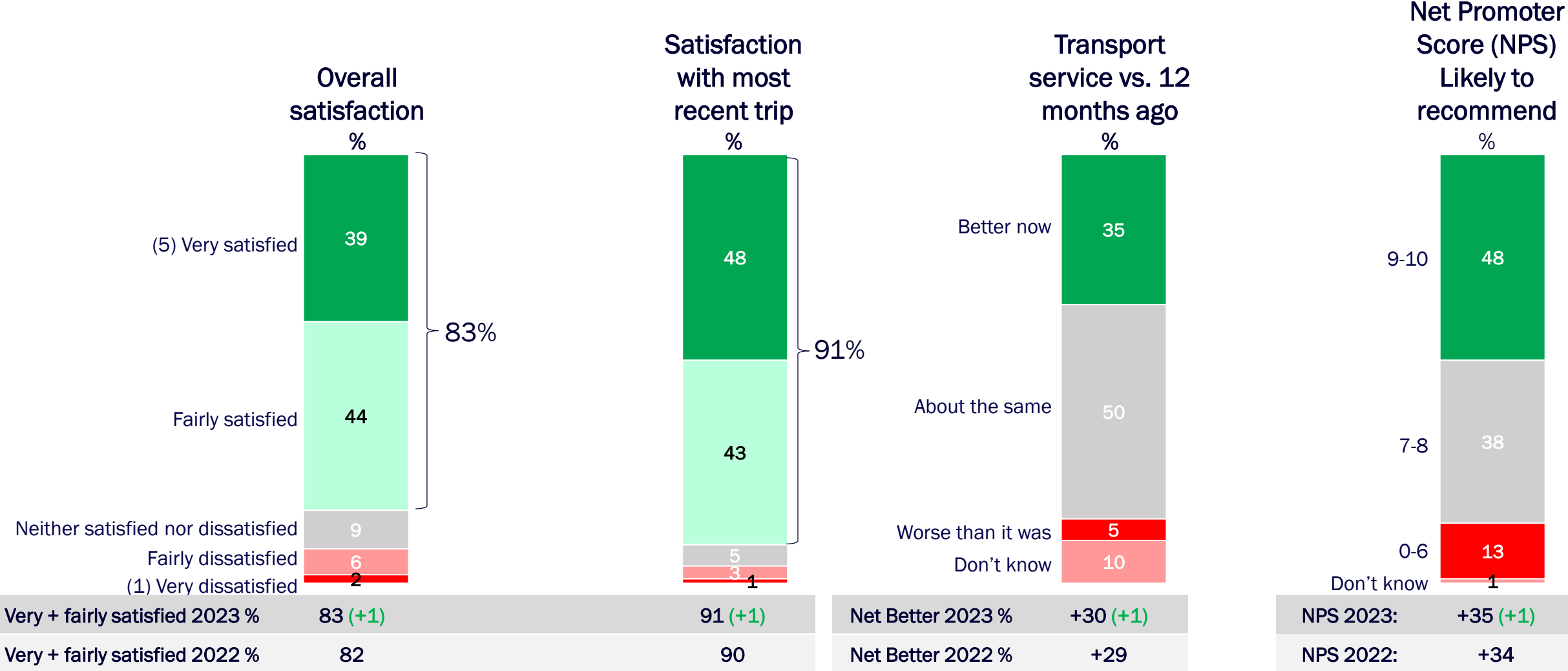
Profile of Sample: Strong sample of regular users across modes.

Base: All Public Transport users N= 6,105

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
<i>Base:</i>	6,105	3,972	1,528	605
	%	%	%	%
Every day/weekday	37	40	27	45
2-4 days per week	32	34	26	32
Once a week	13	12	15	10
At least once a month	10	9	16	7
Once every 2 to 3 months	4	3	9	3
Once every 4 to 6 months	4	2	9	3

2. Overall sentiment towards public transport: More than eight in ten are satisfied. All positive indicators improved marginally since last year.

Base: All Public Transport users N= 6,105



() +/- vs. 2022

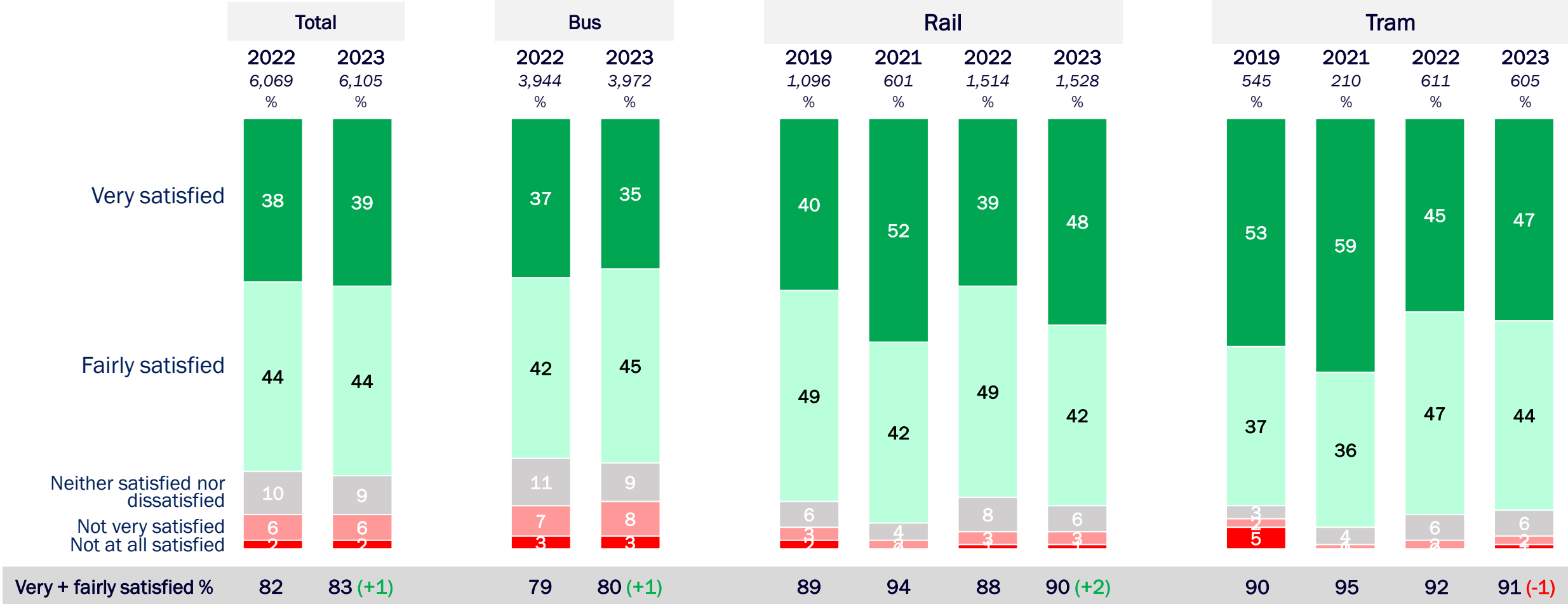
Sentiment by mode: Satisfaction is slightly higher with Rail and Tram, and Bus service rated as better now than what it was 12 months ago. Likely to recommend is at the highest for Rail.

Base: All Public Transport users N= 6,105

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
<i>Base:</i>	6,105	3,972	1,528	605
	%	%	%	%
Overall satisfaction (very+ fairly satisfied)	83	80	90	91
Satisfaction most recent trip (very+ fairly satisfied)	91	90	92	94
Net better (Better now minus worse than it was)	30	32	25	26
NPS (net promoter score) (Likely to recommend)	+35	+28	+49	+45

3. Satisfaction by mode: More than 8 in 10 are satisfied with the service; satisfaction even higher among Rail and Tram users.

Base: All Public Transport users N= 6,105



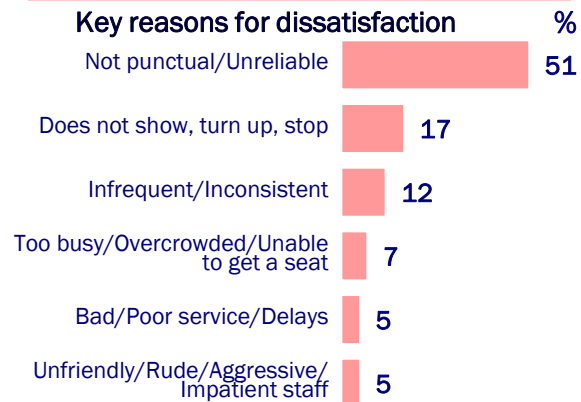
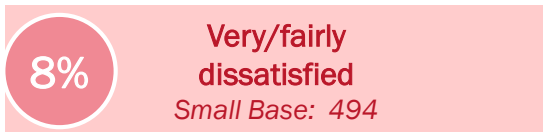
() +/- vs. 2022

December 2023

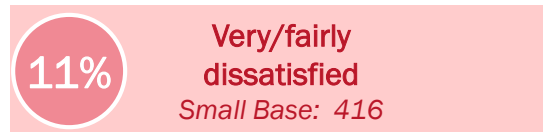
Key reasons for satisfaction and dissatisfaction with modes: Excellent service and reliability top satisfaction drivers.

Base: Public Transport users

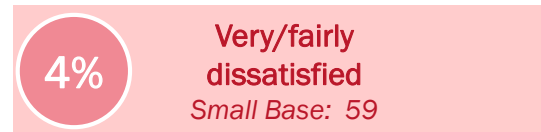
TOTAL PUBLIC TRANSPORT



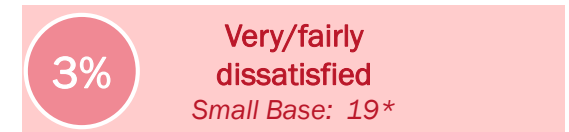
Bus



Rail



Tram



4. Overall satisfaction with key travel attributes: About four in five are satisfied across attributes and satisfaction is relatively stable in comparison to last year. Satisfaction is at the highest for comfort and lowest for reliability.

Base: All Public Transport users N= 6,105



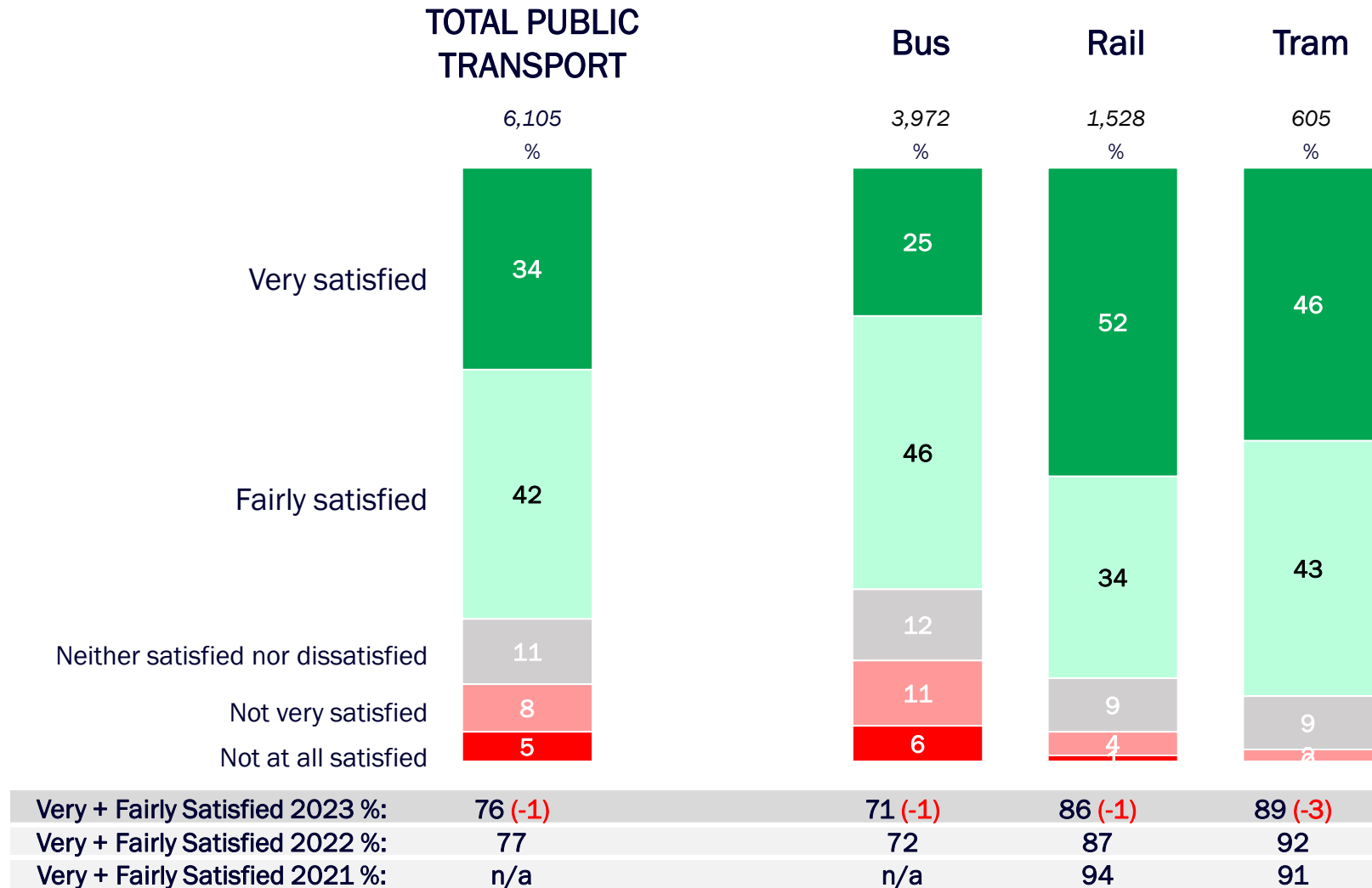
Satisfaction with key travel attributes by mode: Satisfaction with reliability is lowest for Bus.

Base: All Public Transport users N= 6,105

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
<i>Base:</i>	6,105	3,972	1,528	605
	%	%	%	%
Reliability (very+ fairly satisfied)	76	71	86	89
Cleanliness (very+ fairly satisfied)	81	81	78	79
Comfort (very+ fairly satisfied)	87	89	85	84
Crowding (very+ fairly satisfied)	79	84	71	63
Availability of seats (very+ fairly satisfied)	81	87	74	63

4.1 Reliability: 76% of all public transport users are satisfied with reliability of the service. Satisfaction is higher for Tram although this mode registered a marginal decline from 2022. Satisfaction is lower for Bus.

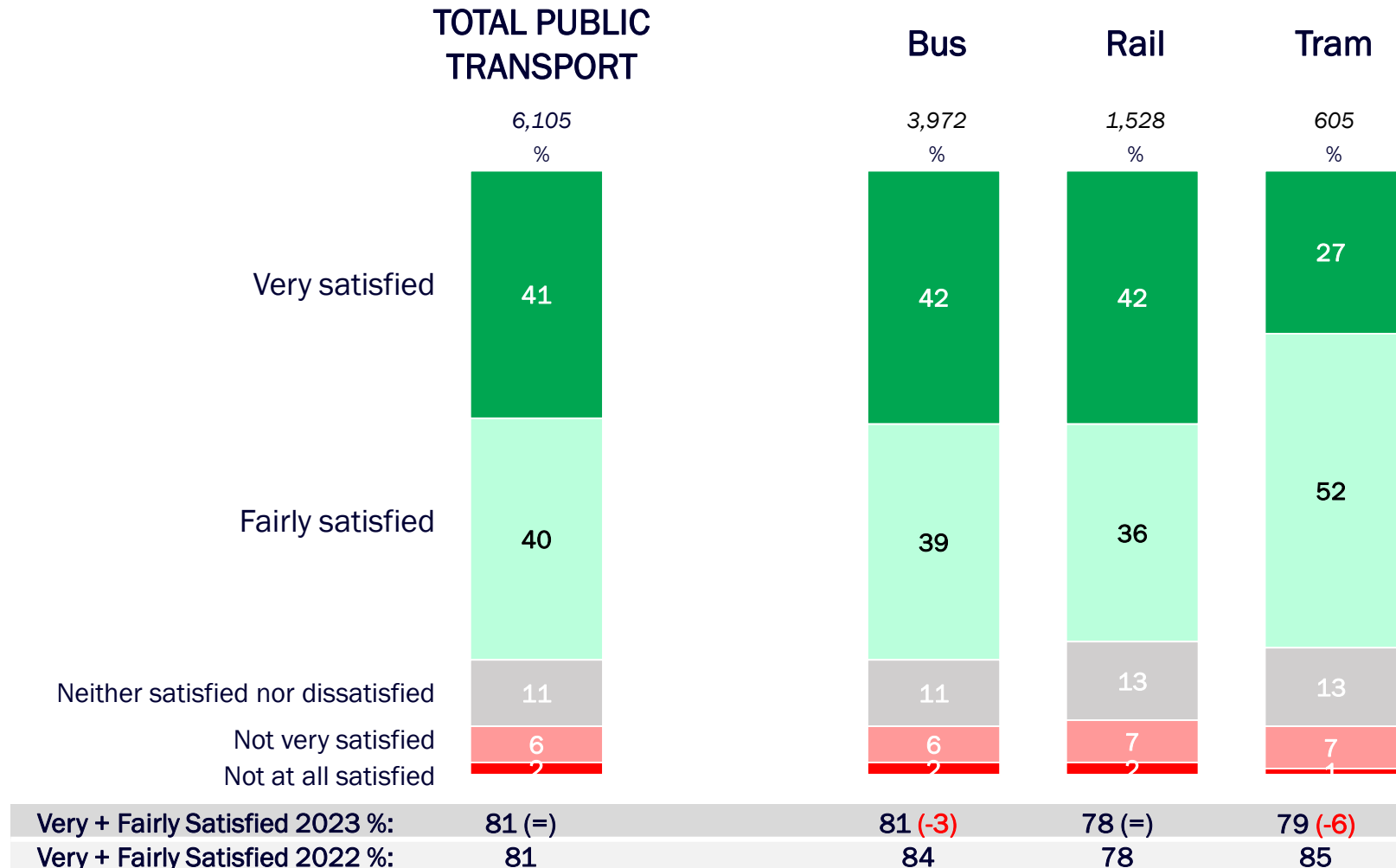
Base: All Public Transport users N= 6,105



() +/- vs. 2022

4.2 Cleanliness of the Service: 8 in 10 are satisfied with cleanliness. Only minor differences across modes. Satisfaction with cleanliness declined for Tram and Bus from 2022.

Base: All Public Transport users N= 6,105

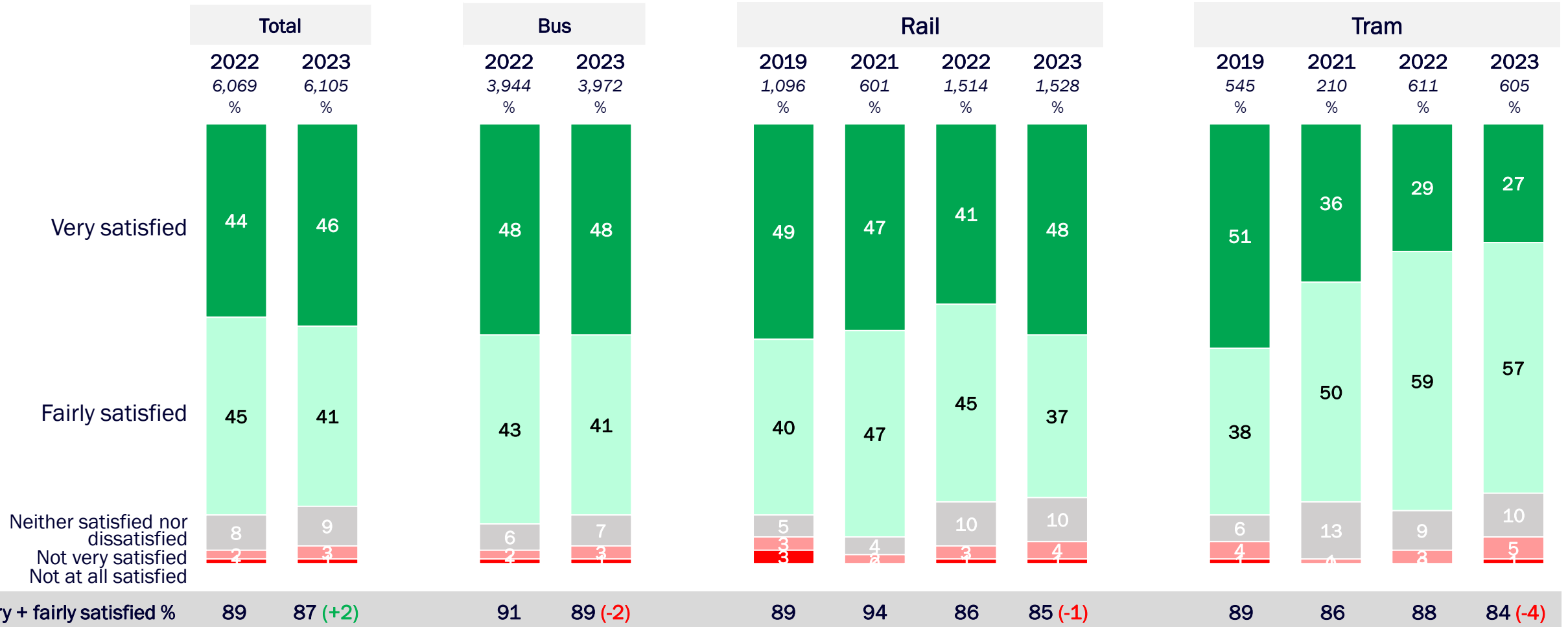


() +/- vs. 2022

December 2023

4.3 Comfort of the service: 87% of public transport users are satisfied with comfort.

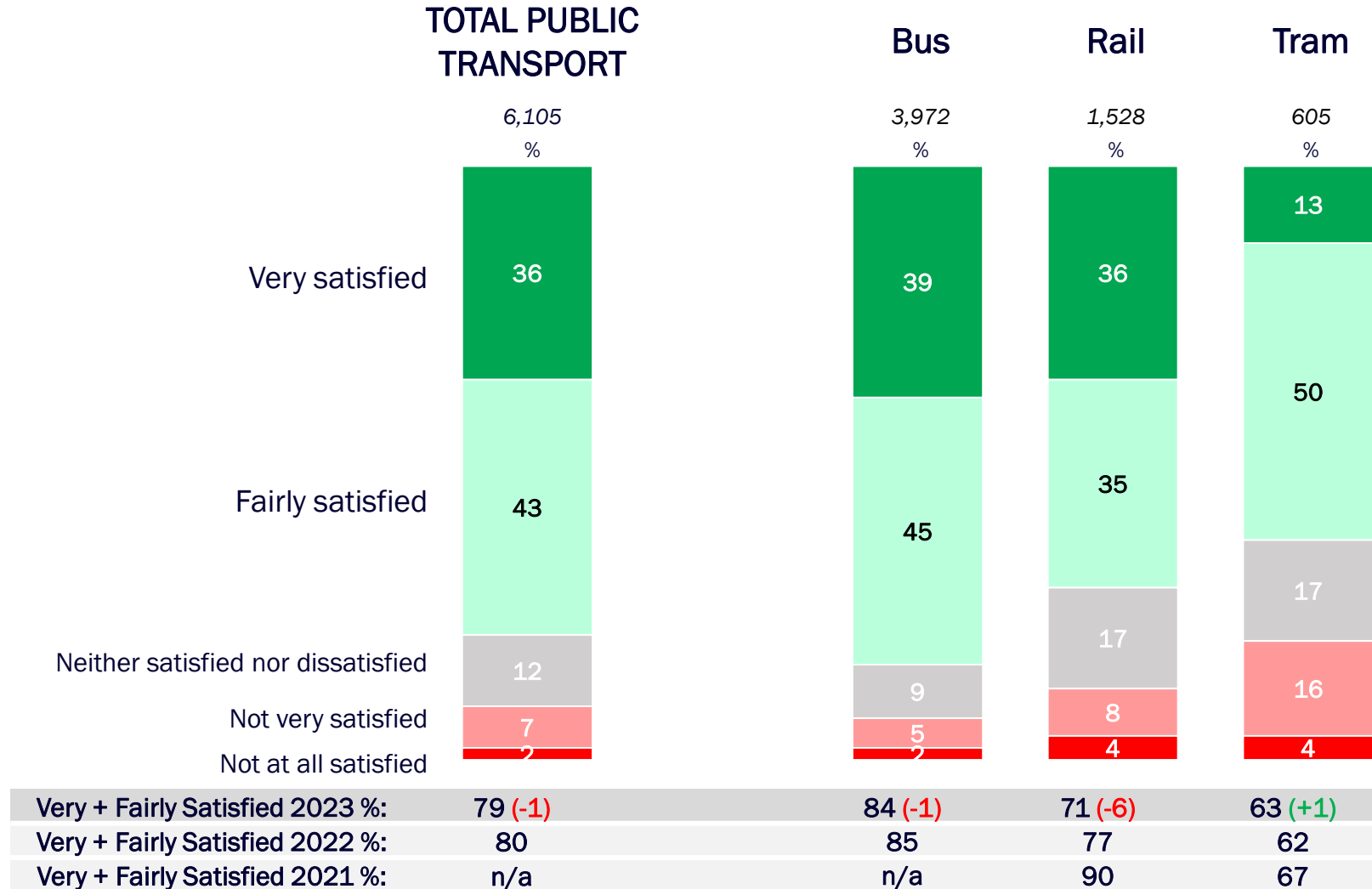
Base: All Public Transport users N= 6,105



() +/- vs. 2022

4.4 Crowding: 79% of public transport users are satisfied with the service. Satisfaction is significantly lower for Tram. Higher satisfaction with crowding on Bus.

Base: All Public Transport users N= 6,105

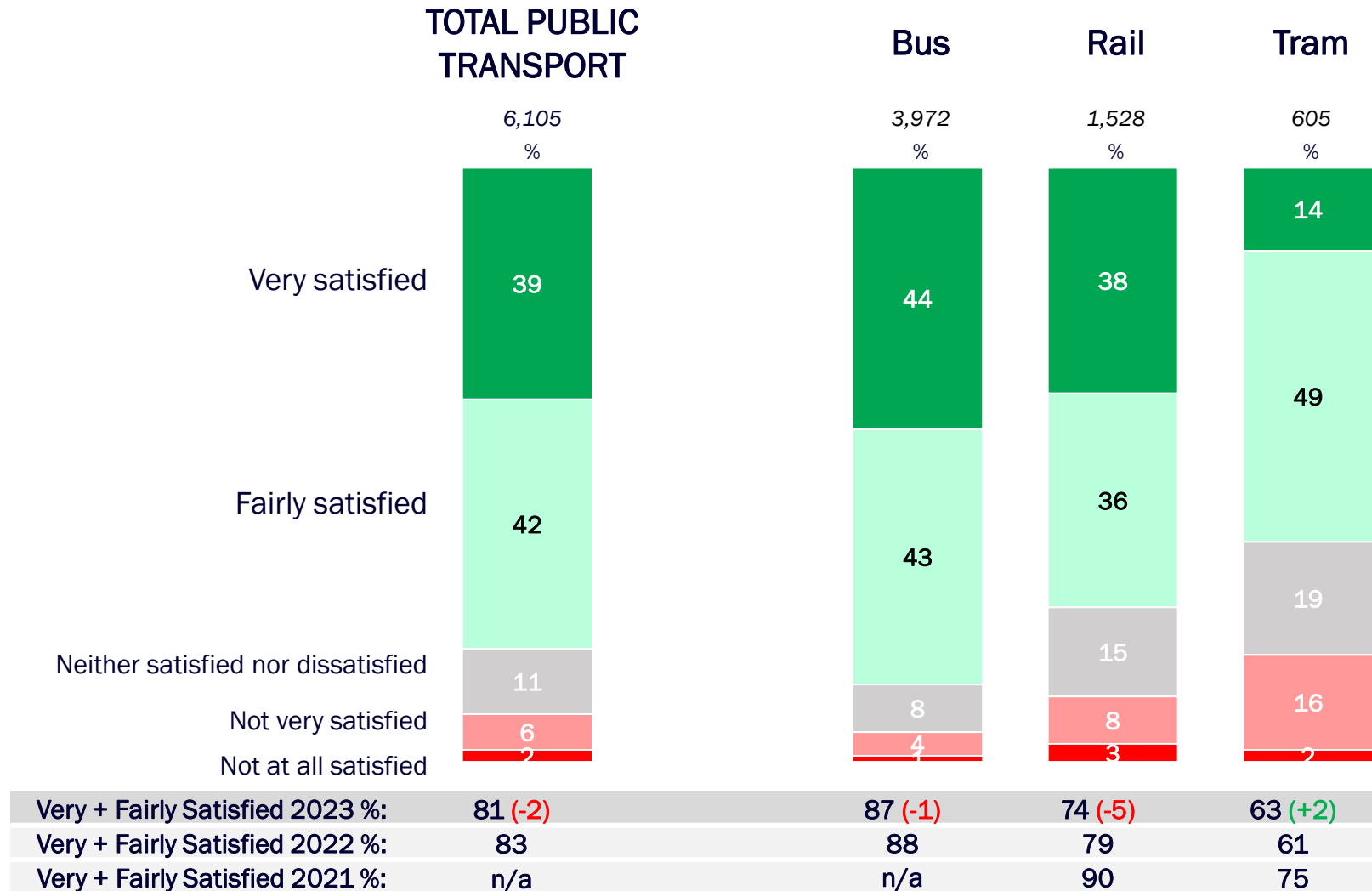


() +/- vs. 2022

December 2023

Availability of seats: Bus users are most satisfied re: availability of seats.

Base: All Public Transport users N= 6,105



() +/- vs. 2022

December 2023

5. Safety overall: Almost all users report feeling safe across all the stages of their journey.

Base: All Public Transport users N= 6,105



Fairly + Very Safe 2023 %:	95 (=)	94 (=)	96 (+1)
Fairly + Very Safe 2022 %:	95	94	95

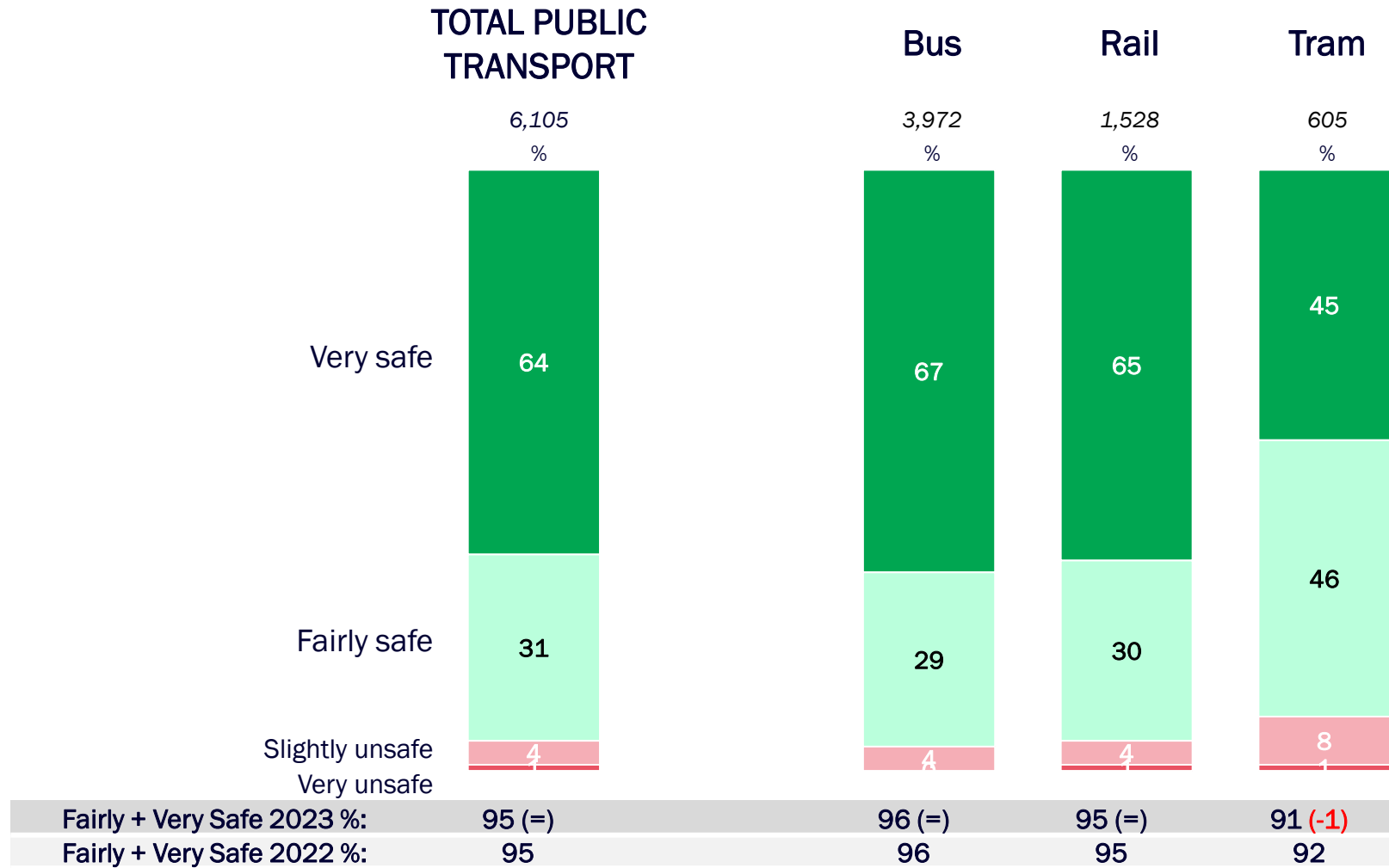
() +/- vs. 2022

Note: Question not asked in 2021



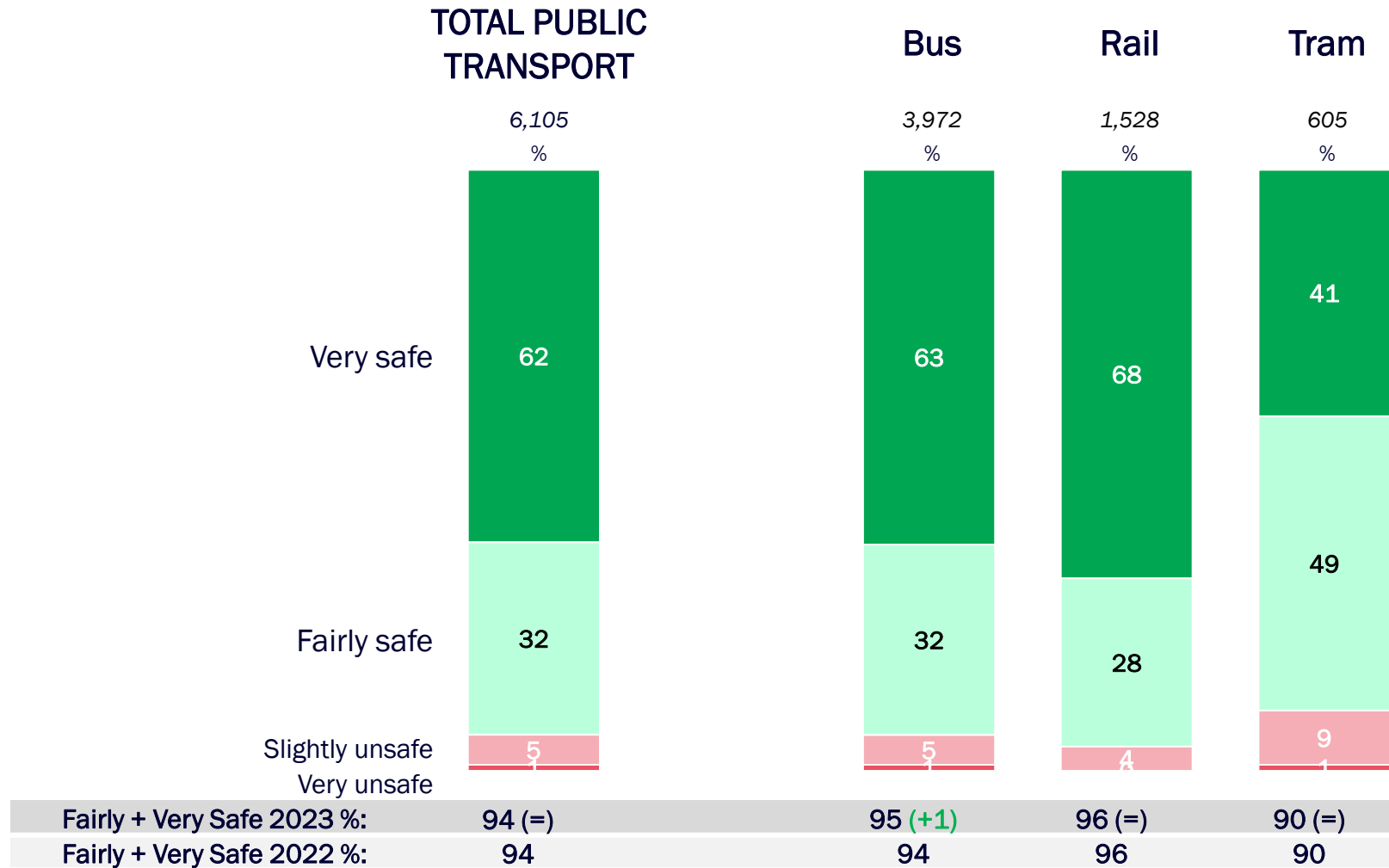
Safety walking to and from the stop: Tram users less likely to report feeling 'very safe' walking to and from Tram stops.

Base: All Public Transport users N= 6,105



Safety at the stop: Incidence of feeling 'very safe' at the stop is lower for Tram.

Base: All Public Transport users N= 6,105

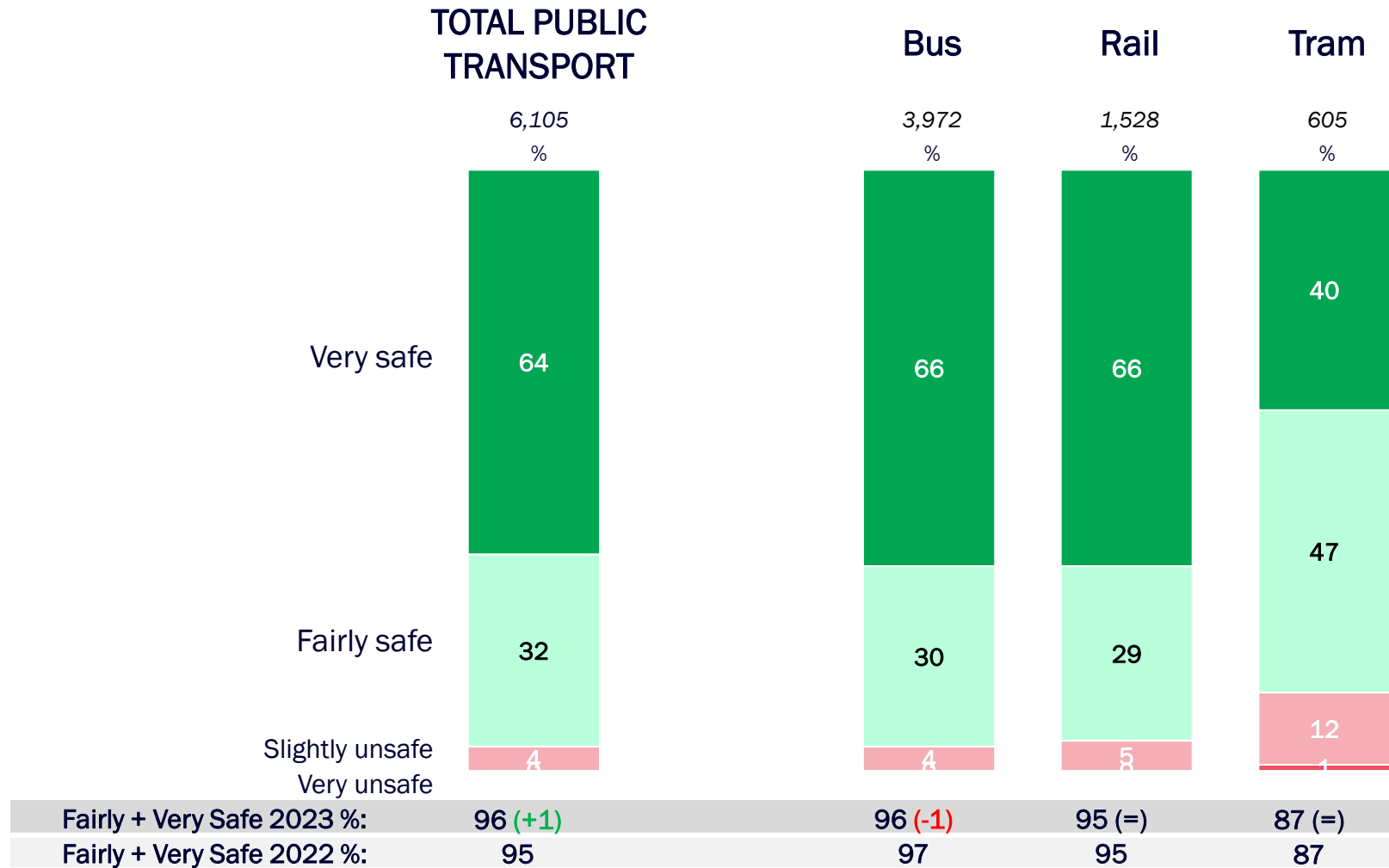


() +/- vs. 2022

December 2023

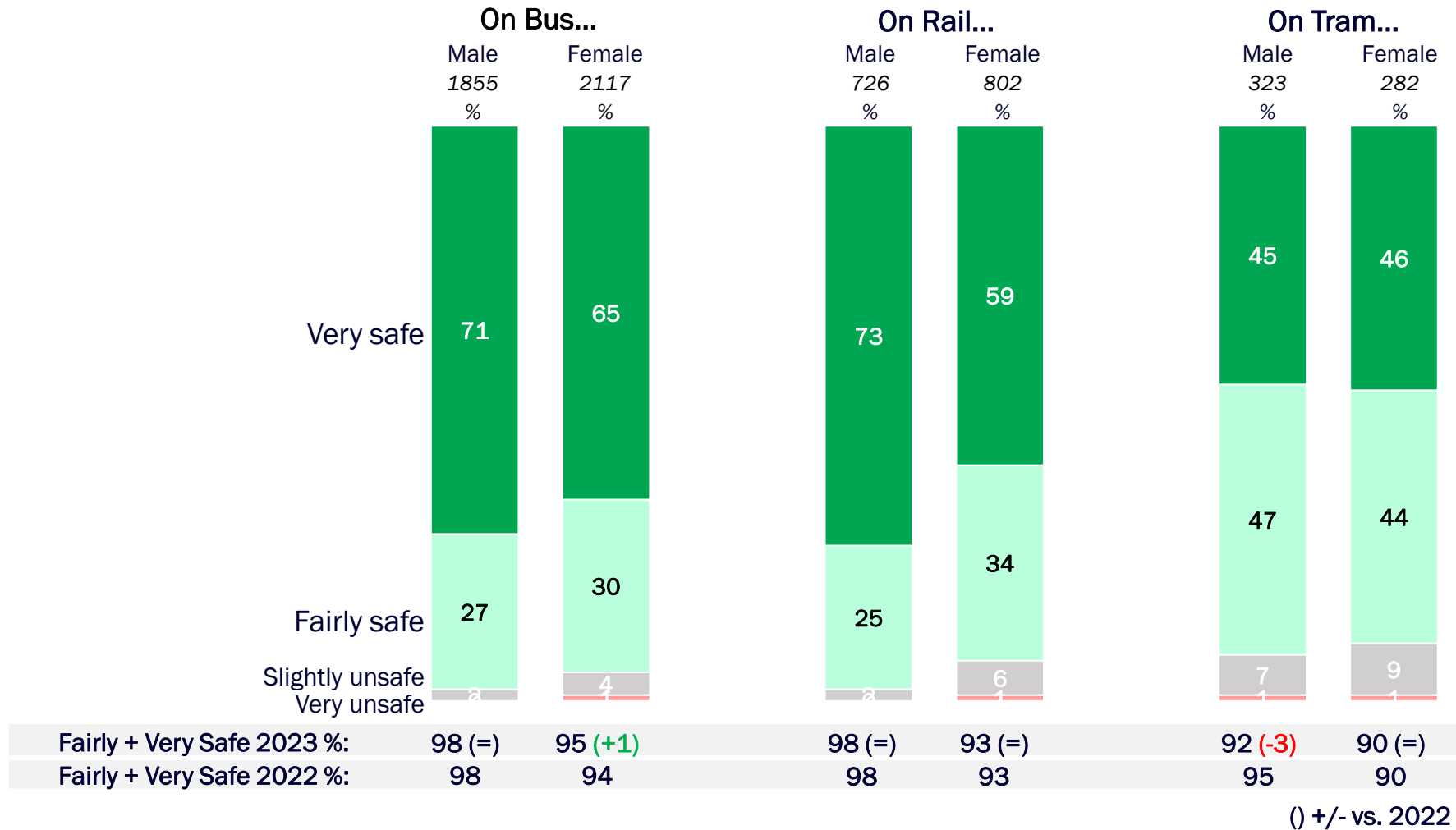
Safety on board: Feeling safe on board is significantly lower for Tram with only 40% feeling very safe.

Base: All Public Transport users N= 6,105



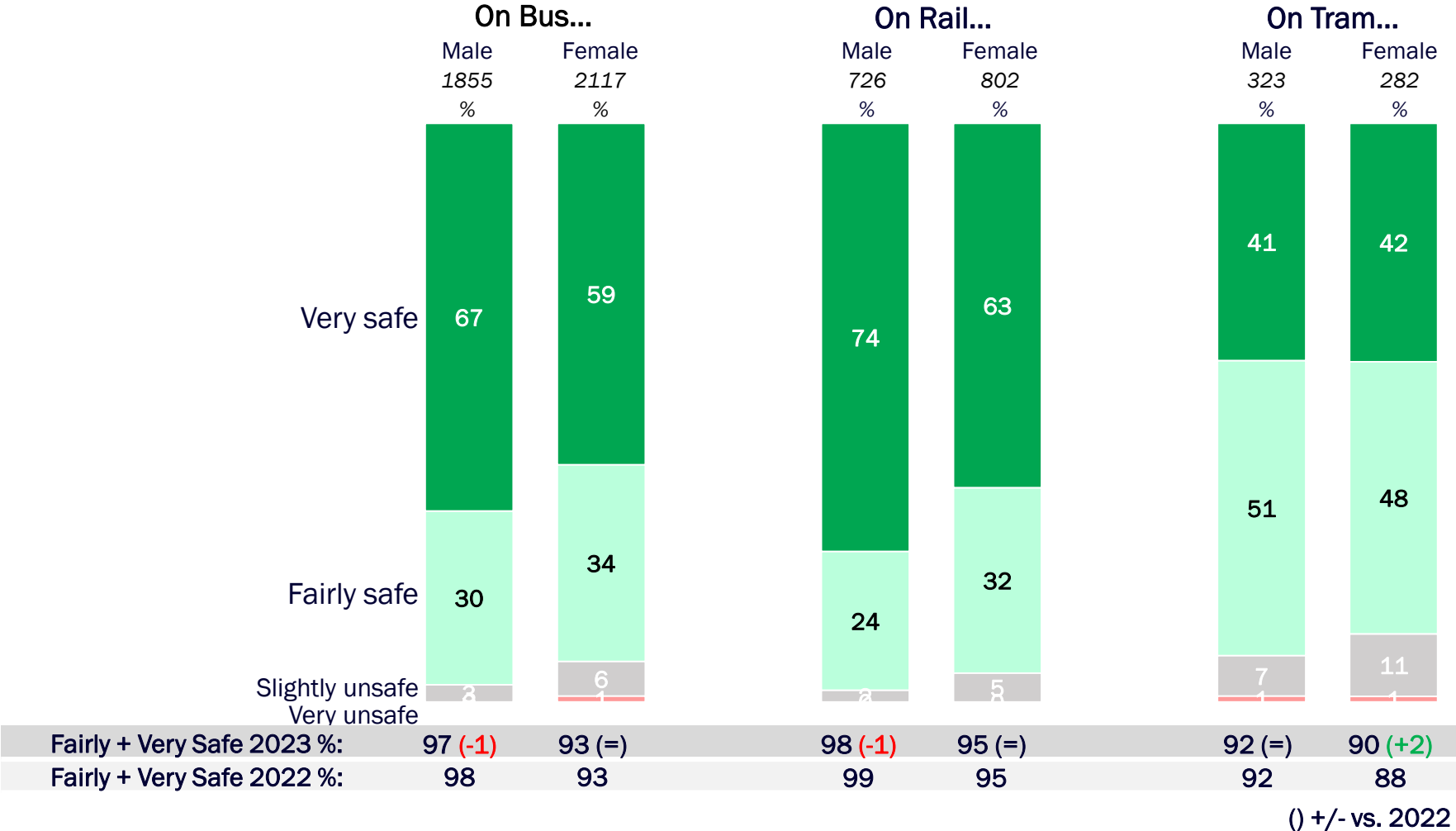
Safety walking to and from the stop by gender: While overall feelings of safety are high, fewer women feel very safe compared to men when walking to/from the Bus and Rail stops.

Base: All Public Transport users N= 6,105



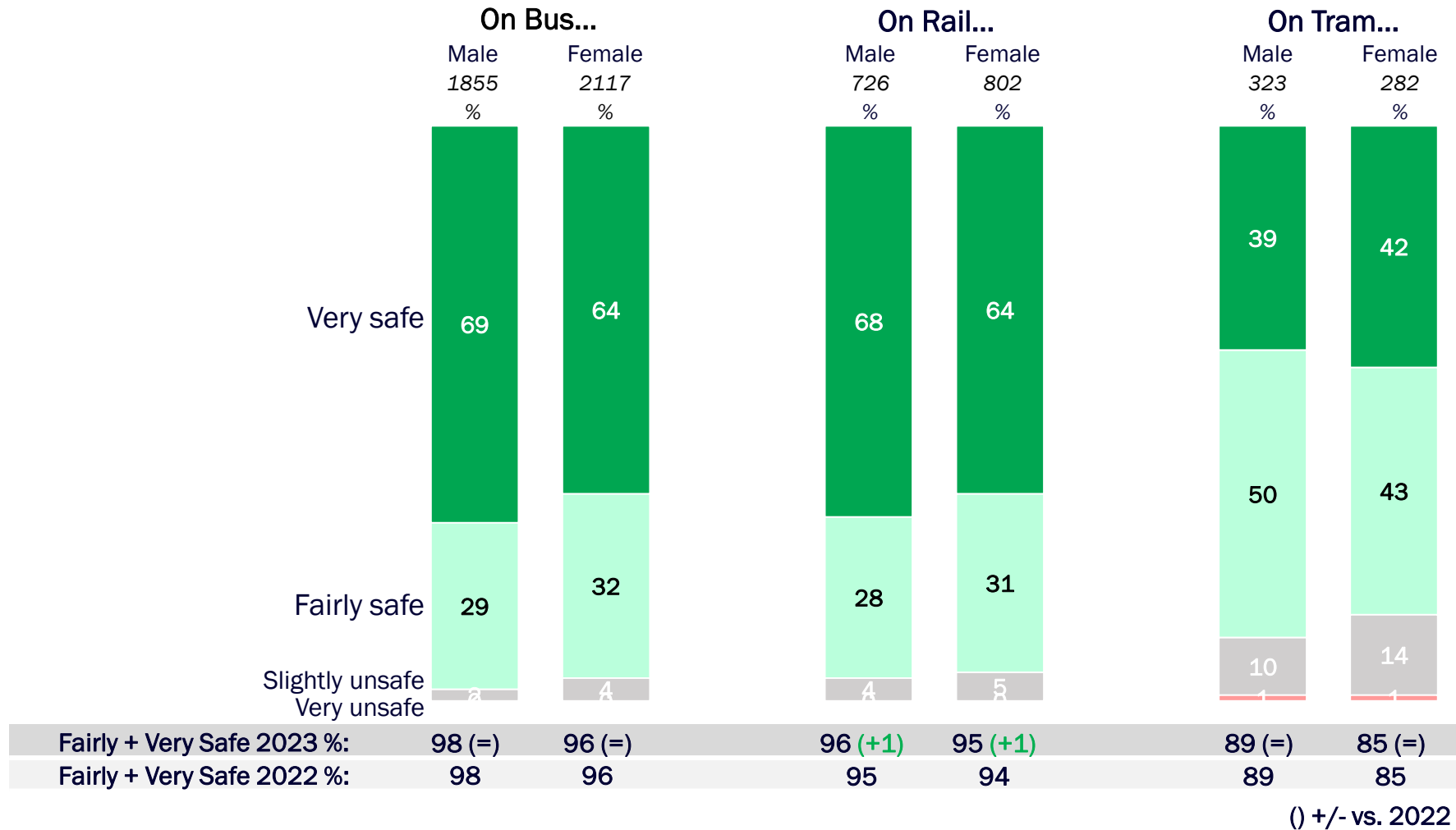
Safety at the stop by gender: Feeling very safe is slightly lower for women at bus and Rail stops.

Base: All Public Transport users N= 6,105



Safety on board by gender: Only minor differences between men and women in feeling safe on board different modes.

Base: All Public Transport users N= 6,105

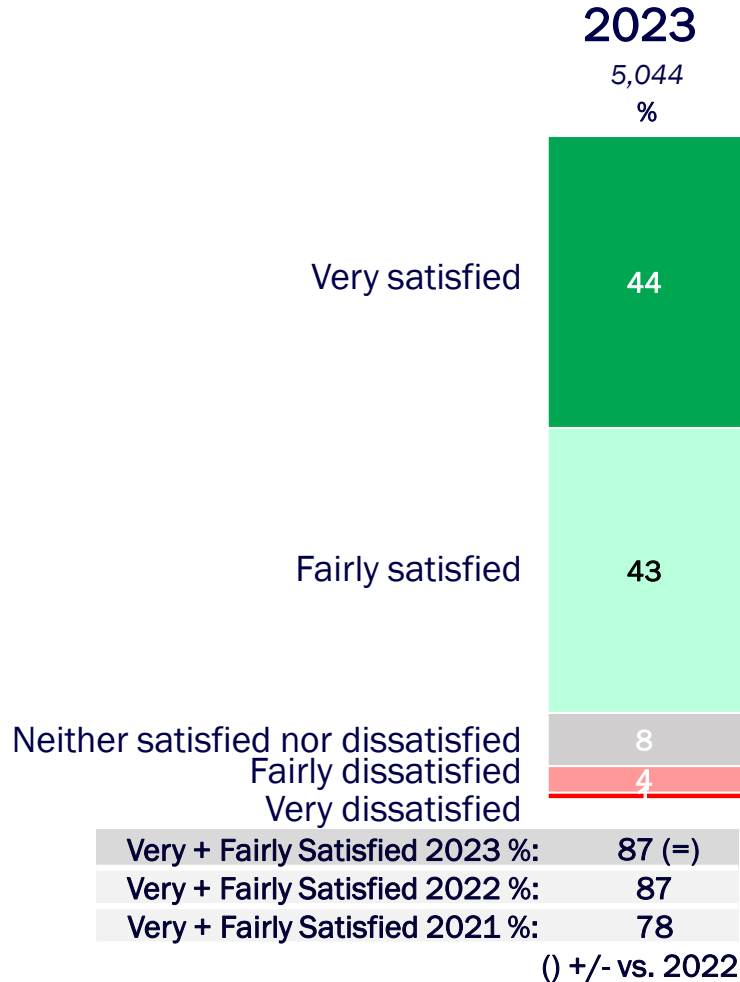


6. Ticketing.

Value for money (VFM): Almost nine in ten are very or fairly satisfied with value for money and this is stable since last year.

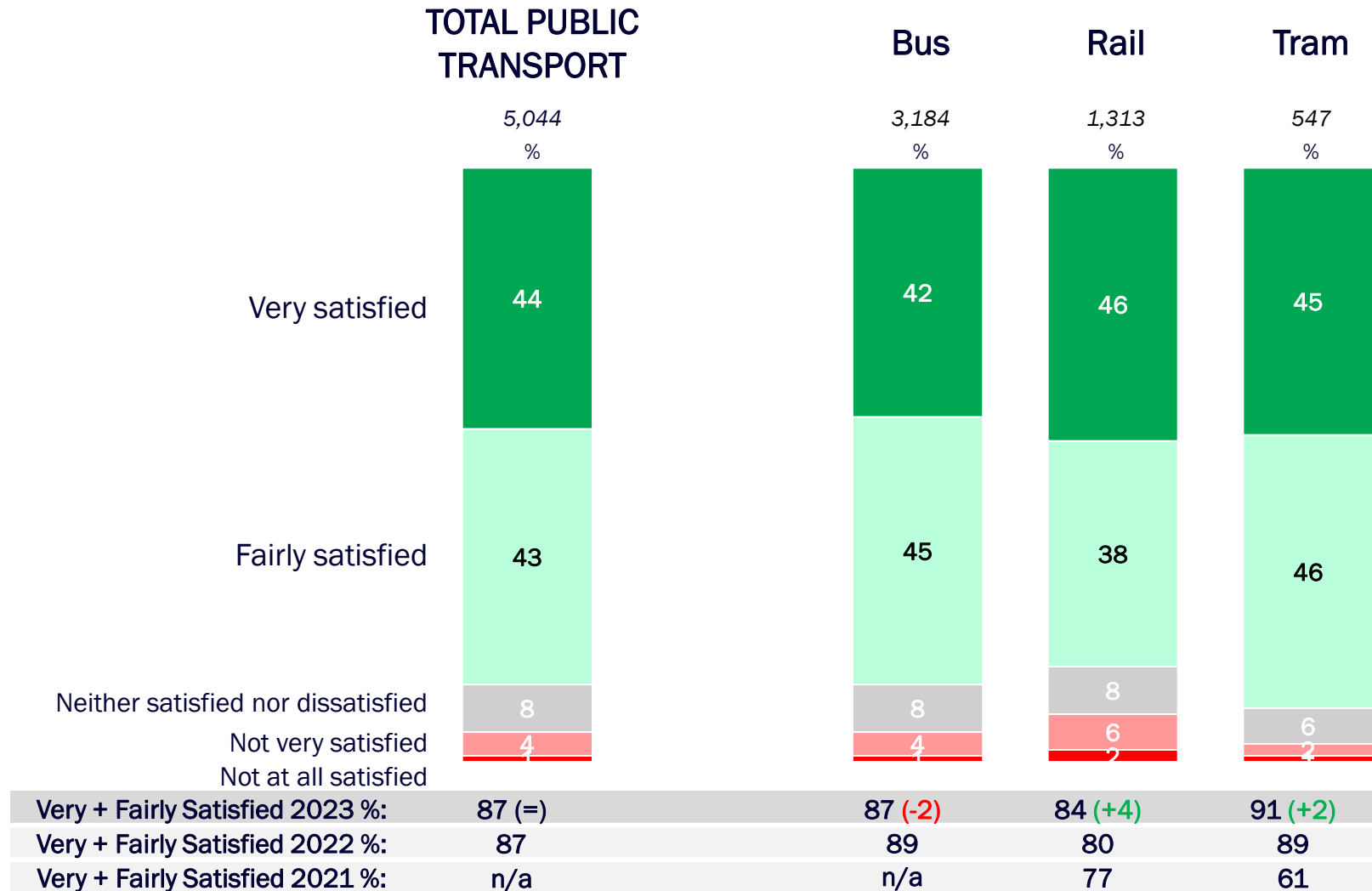
Base: All public transport users ex those with free travel pass N= 5,044

Satisfaction with VFM



Value for money (VFM) by mode: Tram users most satisfied with VFM. Rail users the least satisfied.

Base: All public transport users ex those with free travel pass N= 5,044



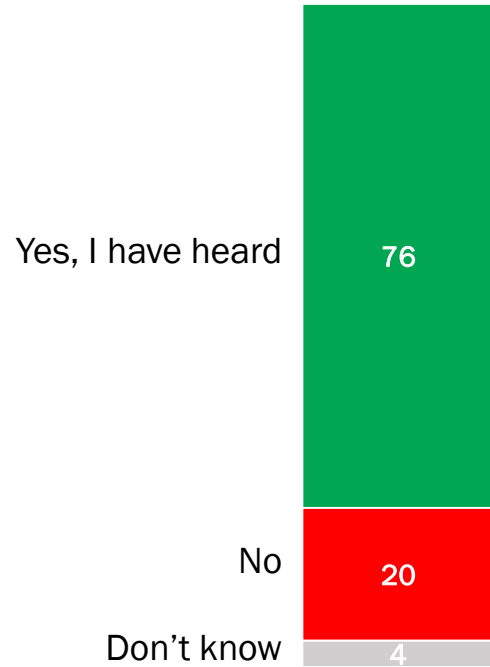
() +/- vs. 2022

TFI 90 minute fare: 76% of public transport users in Dublin are aware of TFI 90 min fare and 69% of Leap Card holder in Dublin have benefitted from using it.

Base: All public transport users in Dublin N= 2,489

Awareness of TFI 90 Minute Fare

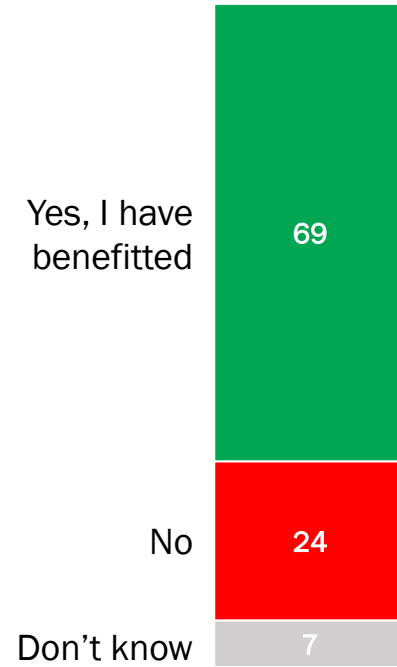
%



Benefitted from transfer for free between multiple services

(Base: All used Leap Card N 2210)

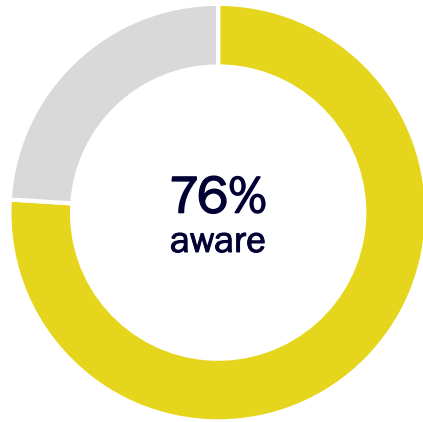
%



Awareness of TFI 90 minute fare: Awareness of TFI 90 minute fare is high across all modes

Base: All public transport users in Dublin N= 2,489

Awareness among all public transport users in Dublin

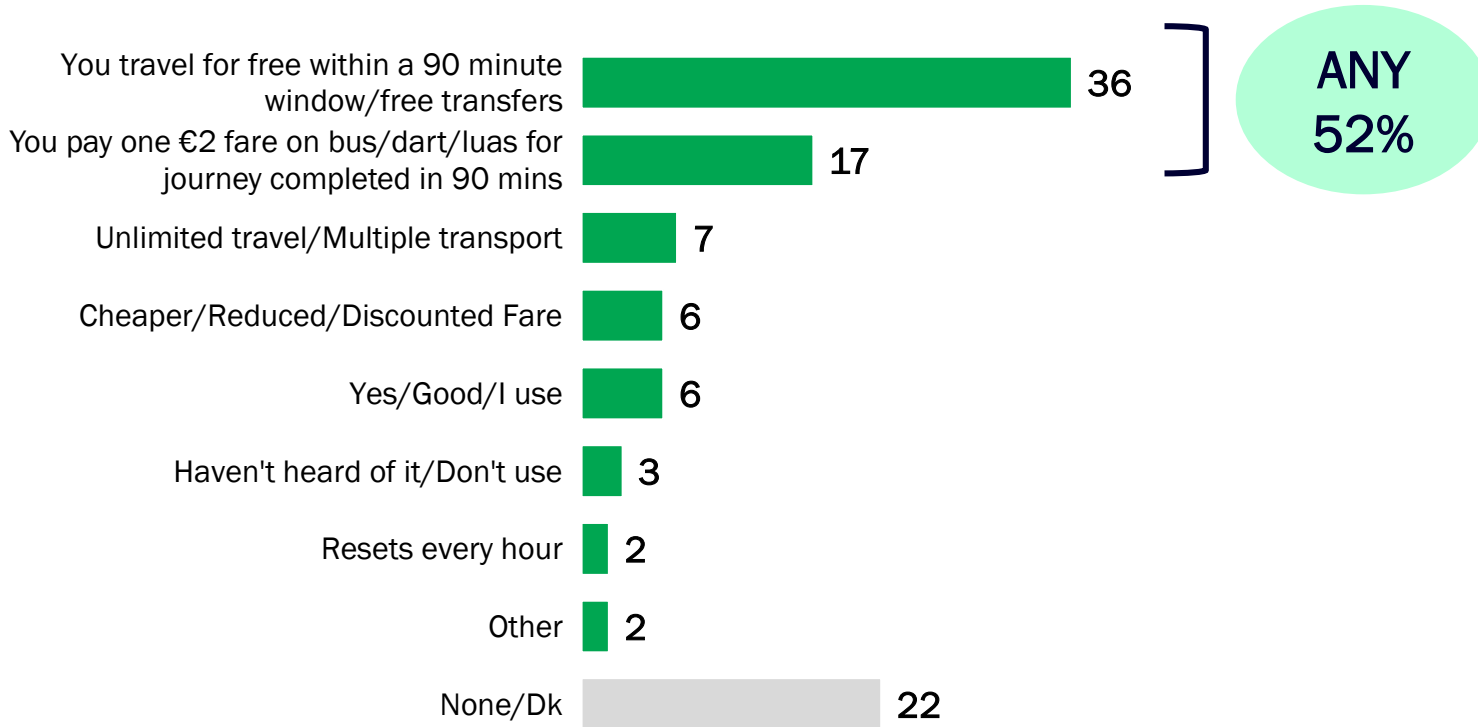


	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
	2,489	1,381	561	547
	%	%	%	%
Yes	76	76	76	76
No	20	19	20	20
Don't know	4	5	4	4

Understanding of TFI 90 minute fare: Half of public transport users in Dublin have an accurate understanding of how the 90 minute fare works.

Base: All public transport users in Dublin N= 2,489

Understanding of How TFI 90 Minute Fare Works %



“I can get on how many transport I want during this time”.

“once you tap your card, you're good for 90 mins on any transport”.

“you tap it and free for 90 mins”.

“Jump on and of in public transportation within 90 minutes”.

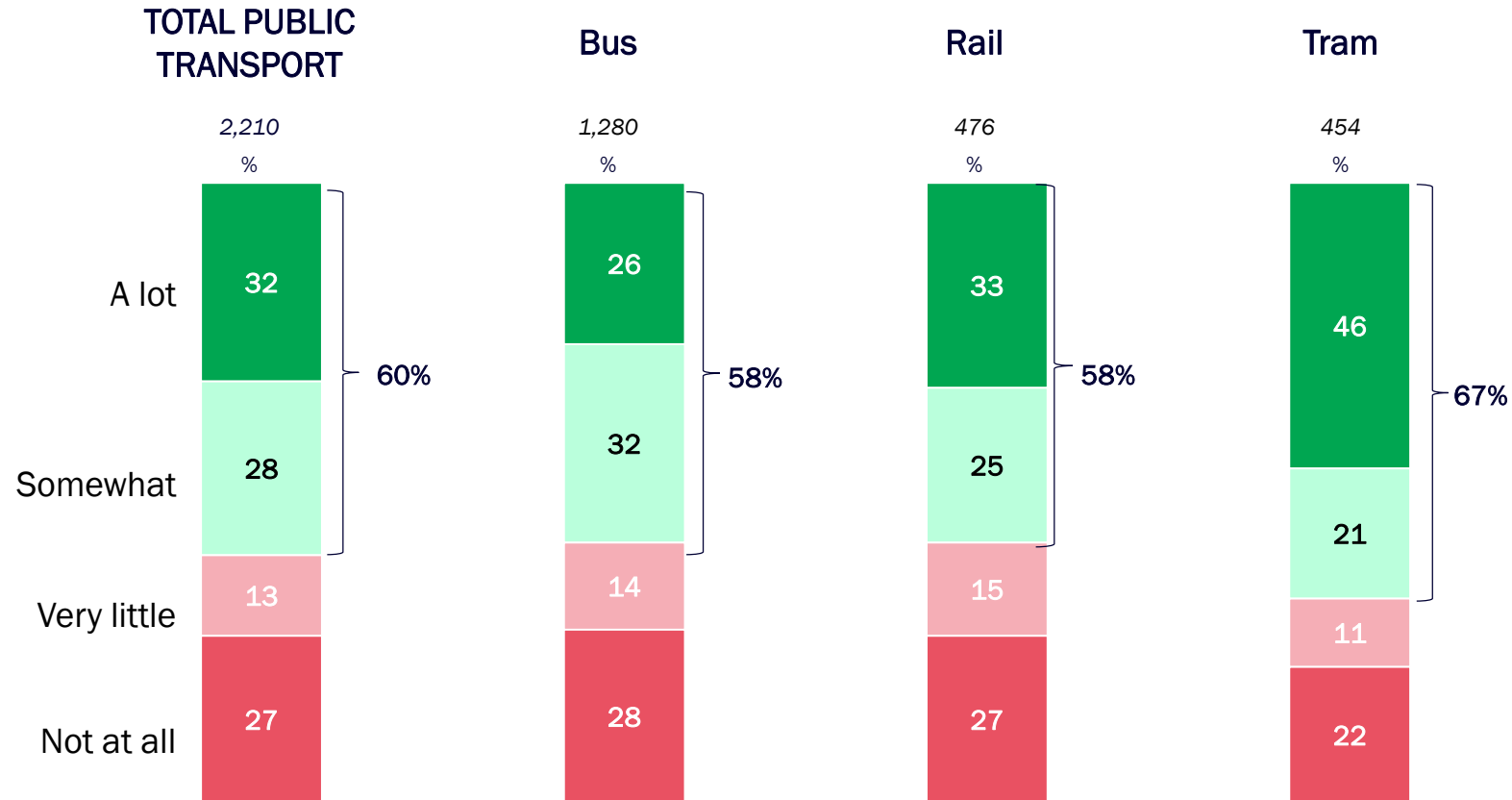
“any transport for 90 mins when you first tap leap card. can be Luas dart or bus”.

“Can go from one form of public transport to another within 90 minutes without paying any additional fare”.

Effectiveness of TFI 90 minute fare in using public transport more: 3 in 5 took more public transport journeys as result of the TFI 90 min fare. Luas users were most likely to claim fare encouraged more journeys

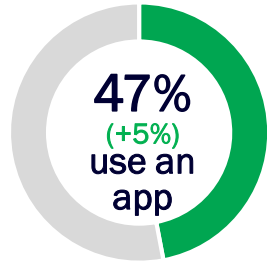
Base: All public transport users in Dublin N= 2,489

To what extent has the TFI 90 minute fare encouraged you to take more public transport journeys?



7. Transport Apps; Use of Apps: App usage to get real time/live/journey planning has increased by 5% since last year to 47%. TFI Live is the most used and usage is especially high for Bus users.

Base: All Public Transport users N= 6,105



	Total 2023 Vs 2022	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
Base:		6105	3,972	1,528	605
	%	%	%	%	%
TFI Live*	+15	29	38	14	13
Online/Google	=	6	5	6	7
Irish Rail Official	=	5	0	22	-
Dublin Bus Apps**	+5	1	2	-	-
Luas Official	=	1	-	0	14
Bus Eireann website/App	=	1	1	-	-
Moovit	=	1	1	0	0
Other	=	1	1	2	1
Don't know / Can't remember	=	5	6	4	4

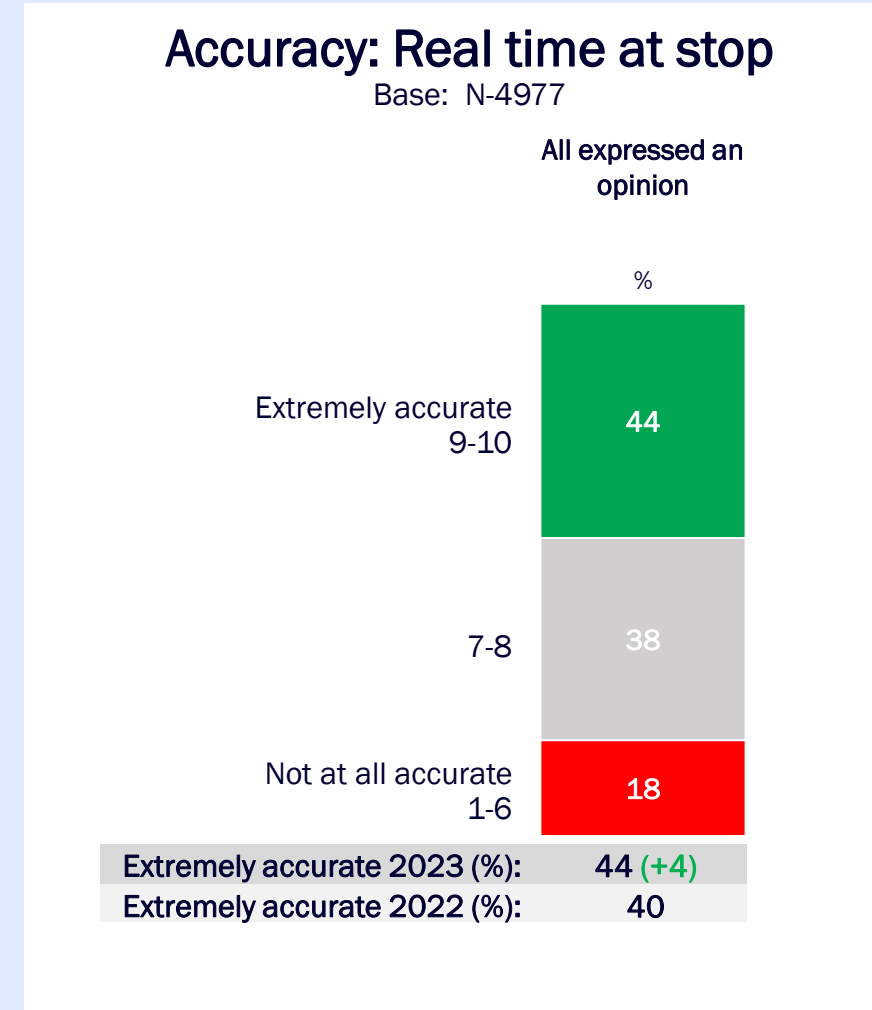
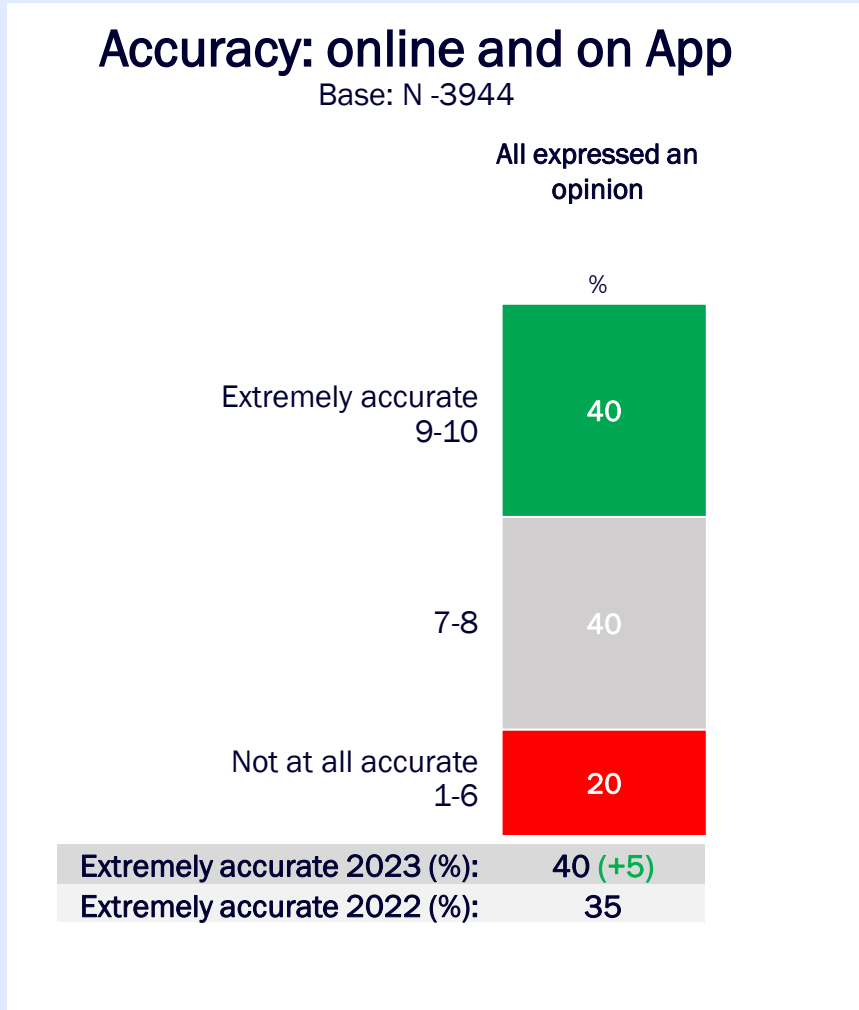
***Wording used for TFI Live:**
 TFI
 TFI Live
 Realtime apps
 Luas and TFI app
 Real time bus
 Real Time Ireland
 Real time live
 RTI
 Rtlive
 TFI
 TFI app
 TFI go
 TFI Live
 TFI Live app
 TFI real time
 tfi transport
 Treal time Ireland

****Wording use for Dublin Bus Apps:**
 Dublin Bus
 Dublin Bus app
 Dublin Bus times
 Dublin Bus website
 Dublin Bus TFI

() +/- vs. 2022

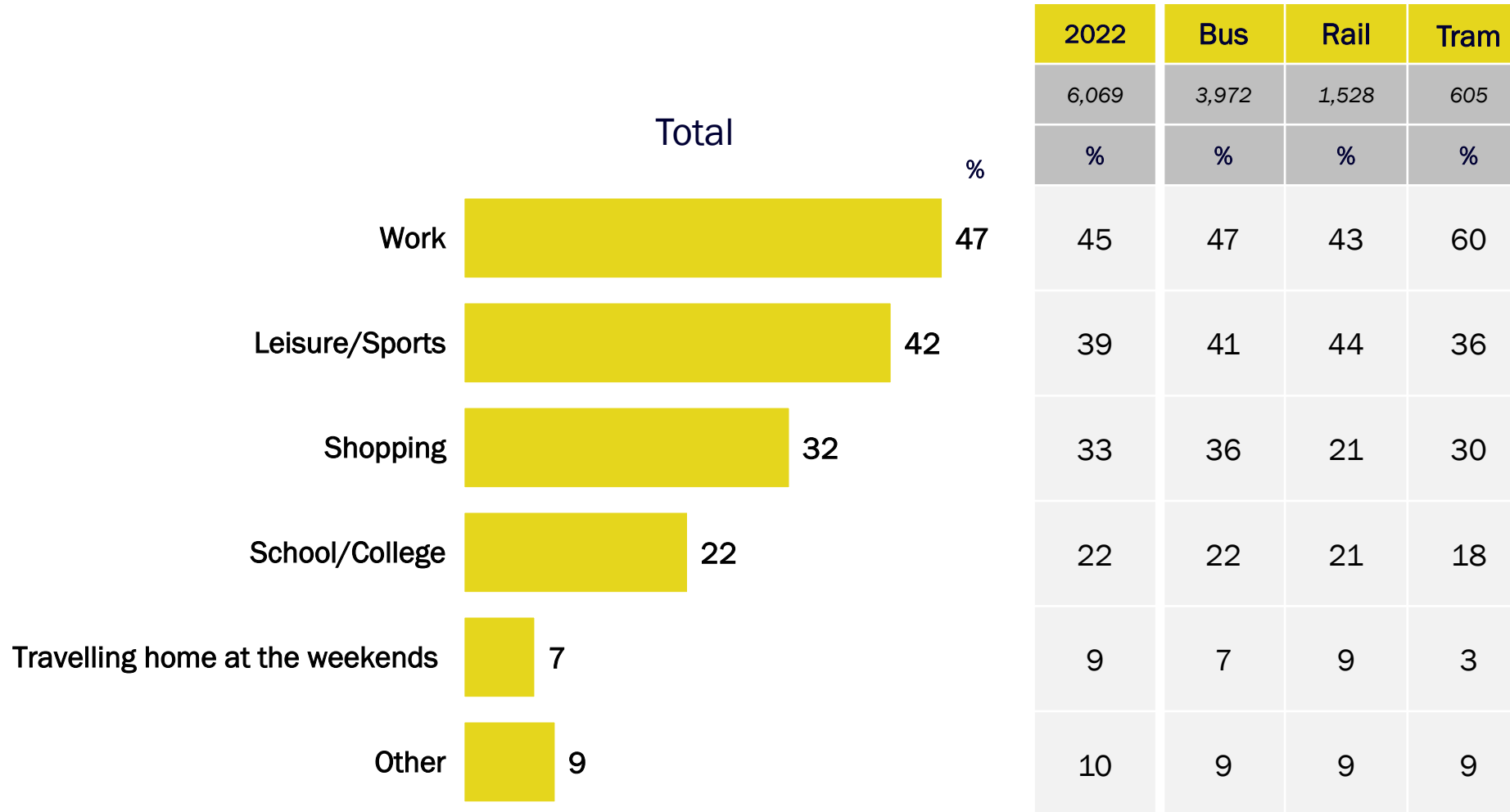
Accuracy of online and Apps vs. Real time at stop: Of those who expressed an opinion, 40% assert the Online App is accurate and 44% assert the real time information at the stop is accurate.

Base: All Public Transport users who expressed an opinion on accuracy



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

Base: All Public Transport users N= 6,105



9. Suggested areas for improvement: Punctuality and frequency dominate suggestions.

Base: All specified areas for improvement N= 2,986

	TOTAL PUBLIC TRANSPORT	Bus	Rail	Tram
<i>Base: All specified areas for improvement - 2,986</i>	2,986	1,929	805	252
	%	%	%	%
Improve frequency of buses/luas/Rail	18	21	13	14
Improve punctuality	14	19	4	4
More Rails/buses - late night and weekends/peak times	14	12	18	21
More security	6	2	10	27
Improve cleanliness	6	4	10	4
More routes	6	6	4	9
Specific routes named for improving	6	7	4	1
Improve overcrowding	5	3	11	8
Improve accuracy of Real Time signs	4	4	2	4
Cheaper fares	4	3	6	4
More/improved shelters	4	6	1	-
Resume catering service	3	0	9	-
Improve payment options- debit/credit card	3	4	1	2
Improve toilet facilities	3	2	7	-
Friendlier/more helpful staff	2	3	0	1
Improve seating/leg room	2	2	4	1
Modernise/update	2	1	4	-
More electronic and printed timetables	2	3	1	1
Communicate delays/cancelled services with customers	2	2	2	2
Improve update app	2	2	1	1
Other (all 1% or less)	22	21	26	19