

TFI CUSTOMER SATISFACTION 2024

On location survey

Quantitative findings



Research Objectives & Methodology

Objectives

The key objectives of this piece of research are to :

- Evaluate customers' satisfaction with public transport;
- Monitor safety perceptions among customers;

Fieldwork dates

2024:

Wave 1 15th Jul- 18th Aug
Wave 2 28th Sept- 2nd Nov

2023:

Wave 1 4th Jul - 2nd Aug
Wave 2 28th Sept - 2nd Nov

2022:

Wave 1 7th Jul - 8th Aug
Wave 2 26th Sept - 31st Oct

2021:

20th Sept - 3rd Nov

2019:

Wave 1 13th Jun - 6th Jul
Wave 2 8th Sept - 1st Oct

Sampling

Face-to-face interviews undertaken on location

Total sample size

2024 = 6,139
2023 = 6,105
2022 = 6,069
2021 = 2,513
2019 = 5,015

Quotas applied at the operator level to provide a robust sample size for each operator. No attempt made to weight data to trip volumes.

No. of interviews by operator

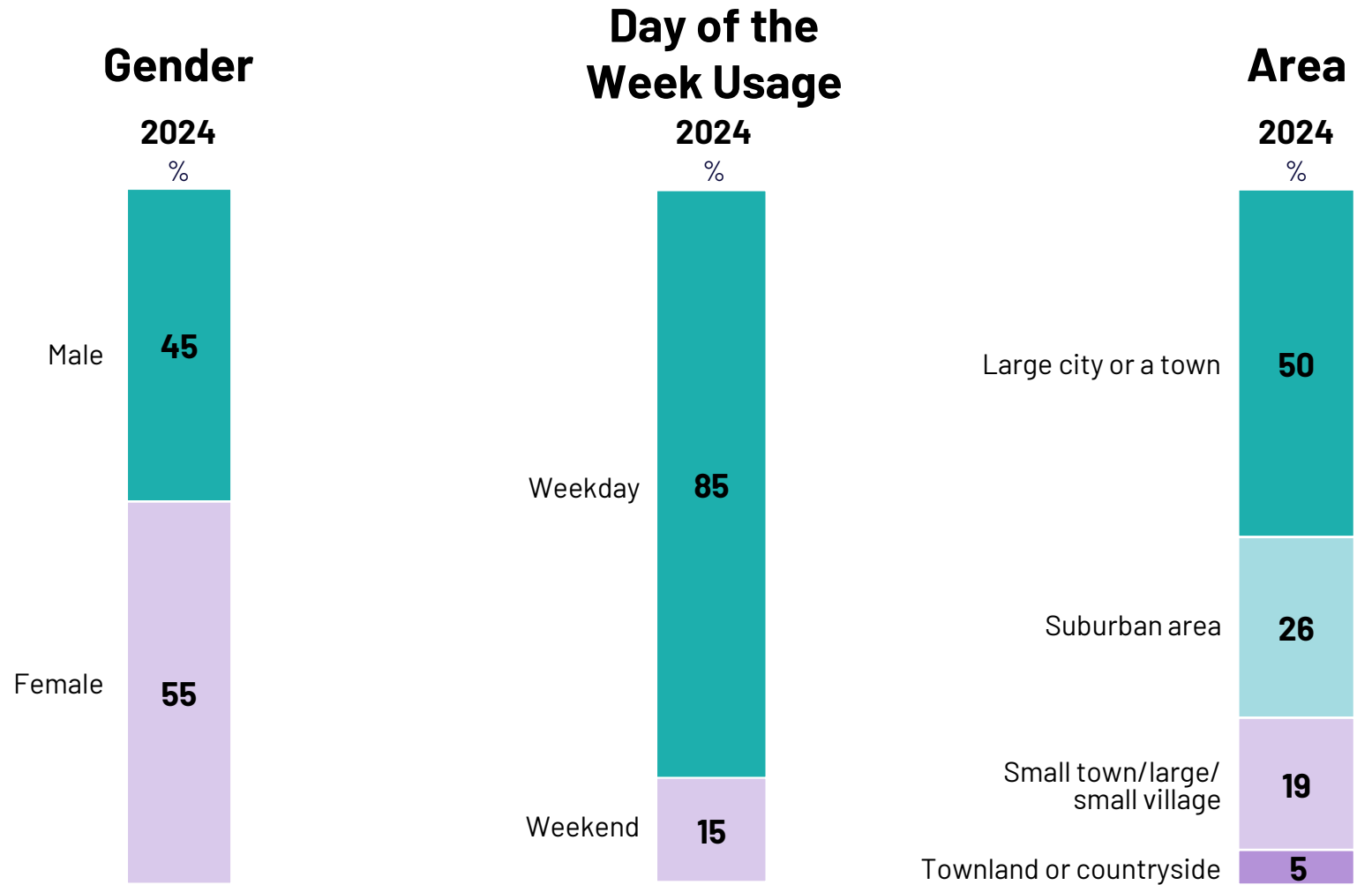
	2024	MOE @95% CL	2023	2022	2021
Bus Éireann	1,619	+/-3%	1,614	1,632	800
Dublin Bus	913	+/-5%	934	912	398
Go Ahead Dublin	622	+/-6%	606	603	198
Go Ahead Kildare	220	+/-10%	205	210	0
Kilkenny Buses	200	+/-10%	200	200	102
TFI local link	407	+/-7%	413	387	0
Irish Rail	940	+/-6%	906	902	401
Irish Rail DART	602	+/-6%	622	612	200
LUAS	616	+/-6%	605	611	210
Total	6,139	+/-2%	6,105	6,069	2,513*

*Private bus adds N=202

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










Profile of Sample

Sample interviewed comprises similar number of male and females, mostly from large city or town or suburban areas.



Profile of Sample

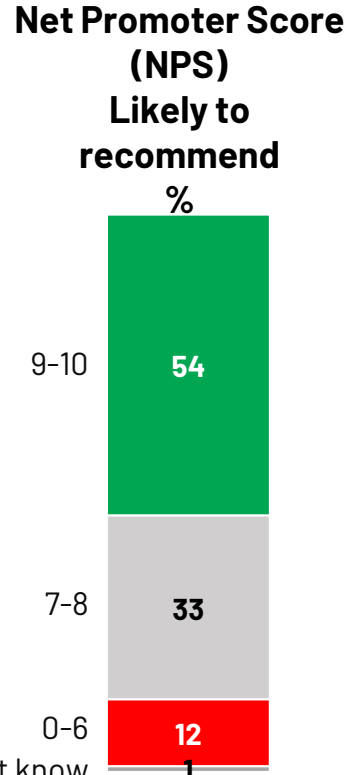
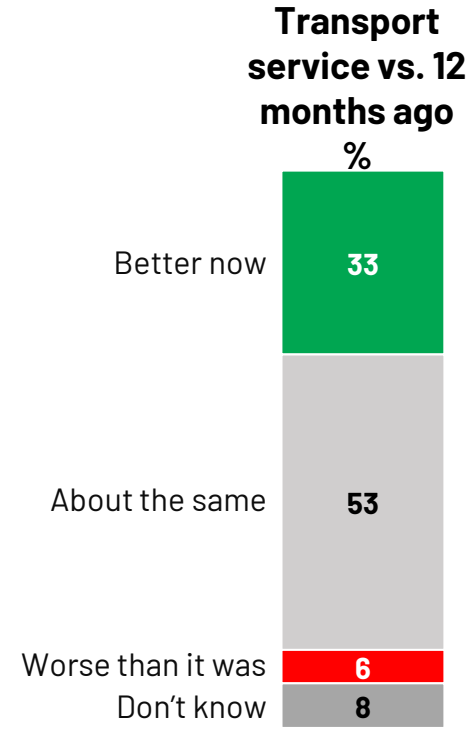
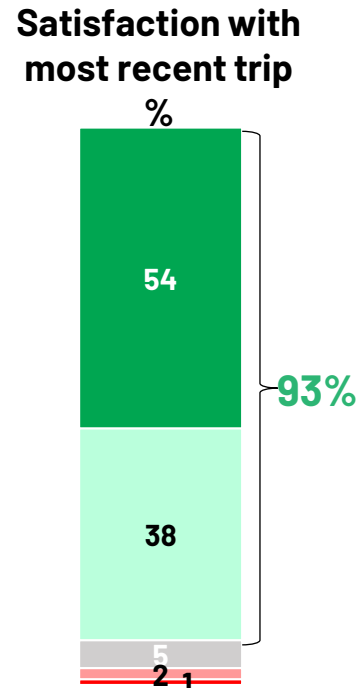
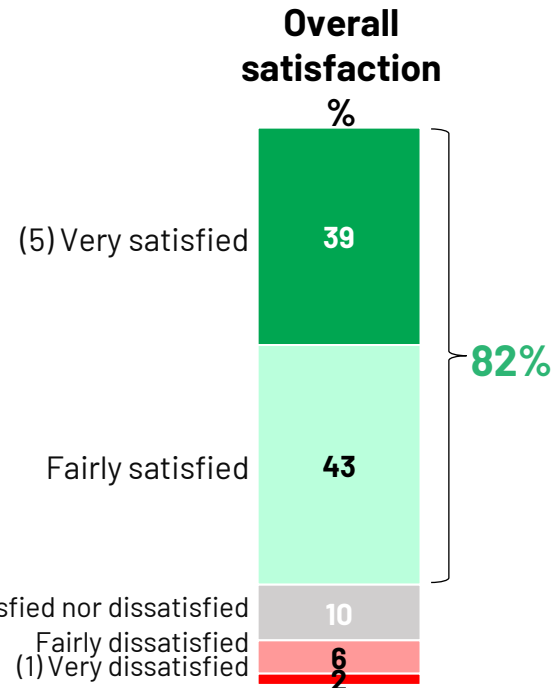
Strong sample of regular users across modes.

	Bus						Rail		Tram
	 Bus Éireann	 Dublin Bus	 Dublin	 Kildare	 KILKENNY BUSES	 TFI local link	 Iarnród Éireann Irish Rail	 DART	 LUAS
Base:	1,619	913	622	220	200	407	940	602	616
	%	%	%	%	%	%	%	%	%
Every day/weekday	43	63	45	36	43	28	16	41	45
2-4 days per week	29	24	34	39	53	42	21	35	31
Once a week	12	7	13	13	3	17	17	12	10
At least once a month	9	3	6	6	1	7	19	8	9
Once every 2 to 3 months	4	2	1	2	1	4	16	2	3
Once every 4 to 6 months	3	1	1	4	-	2	11	2	1

Q.1a How often do you travel on a bus?
 Q.1b How often do you travel on the train?
 Q.1c How often do you travel on the LUAS?
 Base: All Public Transport users

Overall Sentiment Towards Public Transport

Eight in ten are satisfied. Satisfaction is stable in comparison to last year but passengers more likely to recommend. Minor decline in perceiving the service as better now than what it was.



Very + fairly satisfied 2024 %	82 (-1)	93 (+2)
Very + fairly satisfied 2023 %	83	91
Very + fairly satisfied 2022 %	82	90

Net Better 2024 %	+27 (-3)
Net Better 2023 %	+30
Net Better 2022 %	+29

NPS 2024:	+42 (+7)
NPS 2023:	+35
NPS 2022:	+34

() +/- vs. 2023

Q.2 How satisfied or dissatisfied are you with the service provided by [TRANSPORT PROVIDER] overall?

Q.18d How satisfied were you with your most recent trip on [TRANSPORT PROVIDER]?

Q.17 In your opinion is the service better now, worse or about the same as it was versus 12 months ago?









Q.16 How likely are you to recommend the [TRANSPORT PROVIDER] service to someone else in this area? Please use a scale of 0 to 10 where 10 is extremely likely and 0 is not at all likely to recommend.



Base: All Public Transport users N= 6,139

Sentiment Towards Operators

Satisfaction is strongest for Kilkenny Buses, Local Link and Irish Rail.

	 Bus Éireann	 Dublin Bus	 GoAhead IRELAND Dublin Kildare		 KILKENNY BUSES	 TFI local link	 Iarnród Éireann Irish Rail	 DART	 LUAS
Base:	1,619	913	622	220	200	407	940	602	616
	%	%	%	%	%	%	%	%	%
Overall satisfaction (very+ fairly satisfied)	77	69	82	90	100	96	93	81	89
Satisfaction most recent trip (very+ fairly satisfied)	87	91	90	93	97	99	94	94	97
Net better (Better now minus worse than it was)	+18	+47	+27	+46	+47	+44	+29	+13	+10
NPS (net promoter score) (Likely to recommend)	+10	+39	+14	+38	+88	+68	+56	+70	+82

Q.2 How satisfied or dissatisfied are you with the service provided by [TRANSPORT PROVIDER] overall?

Q.18d How satisfied were you with your most recent trip on [TRANSPORT PROVIDER]?

Q.17 In your opinion is the service better now, worse or about the same as it was 12 months ago?









Q.16 How likely are you to recommend the [TRANSPORT PROVIDER] service to someone else in this area? Please use a scale of 0 to 10 where 10 is extremely likely and 0 is not at all likely to recommend.

Base: All Public Transport users



Sentiment Towards Operators: Difference Vs 2023

More improvements than disimprovements. More positive feedback for Go-Ahead Kildare while declines are registered for Bus Éireann.

	 Bus Éireann	 Dublin Bus	 GoAhead IRELAND		 KILKENNY BUSES	 TFI local link	 Iarnród Éireann Irish Rail	 DART	 LUAS
Base:	1,619	913	622	220	200	407	940	602	616
	%	%	%	%	%	%	%	%	%
Overall satisfaction (very+ fairly satisfied)	-2	-4	+12	+5	+3	+1	+3	-9	-2
Satisfaction most recent trip (very+ fairly satisfied)	-2	+2	+2	+4	-1	+3	+2	+2	+3
Net better (Better now minus worse than it was)	-13	+13	+2	+16	-2	+2	+1	-7	-16
NPS (net promoter score) (Likely to recommend)	-12	+24	-15	+21	+22	+1	+6	+22	+37

Q.2 How satisfied or dissatisfied are you with the service provided by [TRANSPORT PROVIDER] overall?

Q.18d How satisfied were you with your most recent trip on [TRANSPORT PROVIDER]?

Q.17 In your opinion is the service better now, worse or about the same as it was versus 12 months ago?

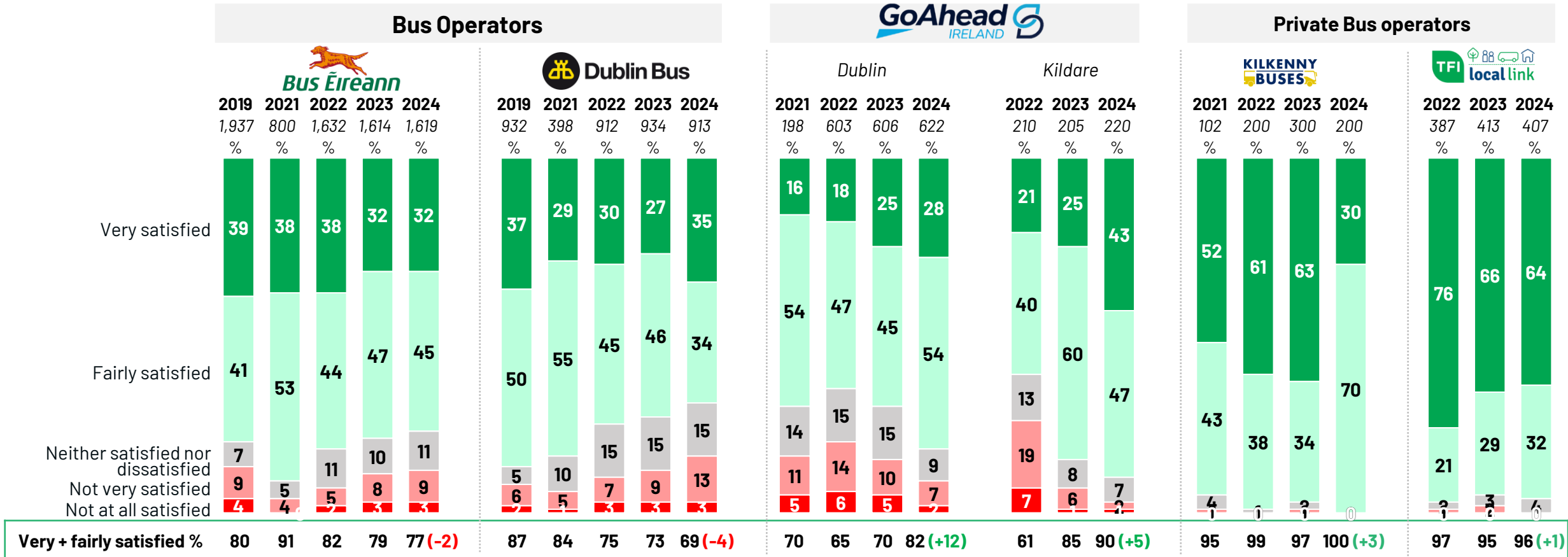
Q.16 How likely are you to recommend the [TRANSPORT PROVIDER] service to someone else in this area? Please use a scale of 0 to 10 where 10 is extremely likely and 0 is not at all likely to recommend.

Base: All Public Transport users



Satisfaction with Bus Modes Over Time

Lowest scores registered for Dublin Bus and Bus Éireann. Decline in satisfaction for Dublin Bus while GoAhead improved especially in Dublin.



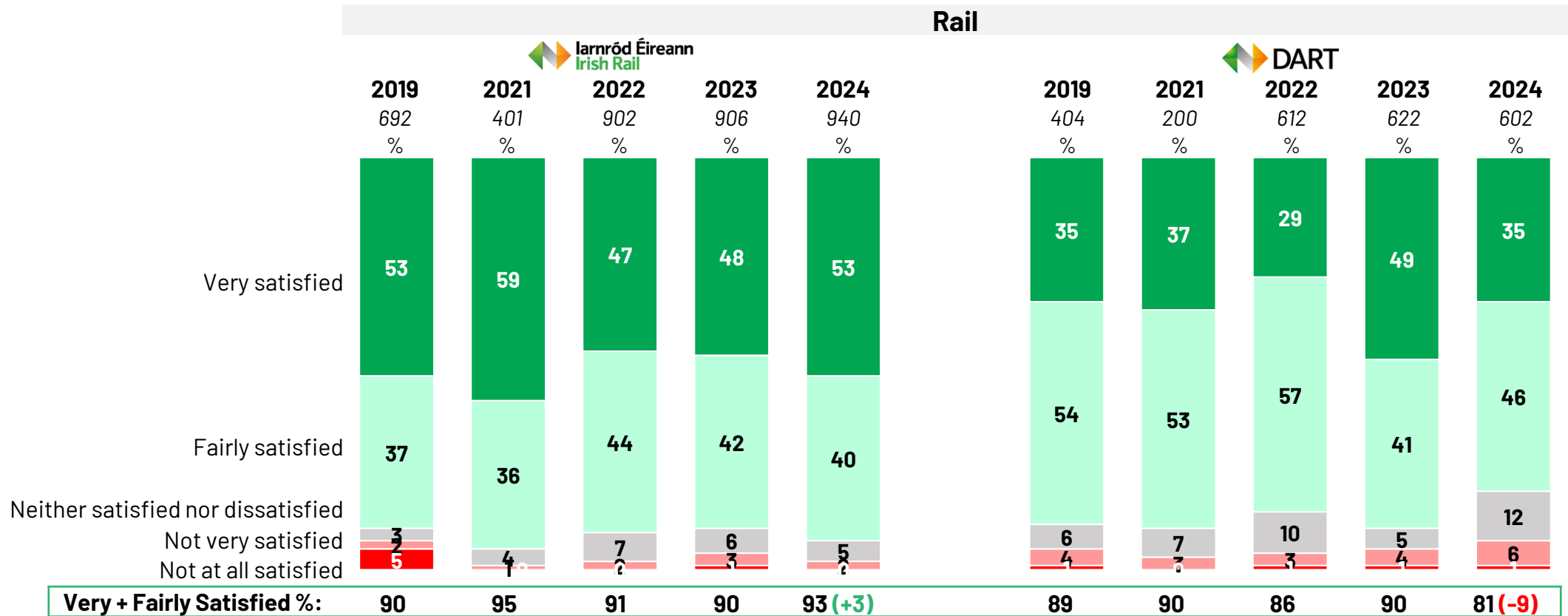
() +/- vs. 2023

Q.2 How satisfied or dissatisfied are you with the service provided by [TRANSPORT PROVIDER] overall?
Base: All Bus Users



Satisfaction with Irish Rail and Irish Rail DART

9 in 10 satisfied with Irish Rail and 8 in 10 with DART. Satisfaction declined for DART in comparison to last year.



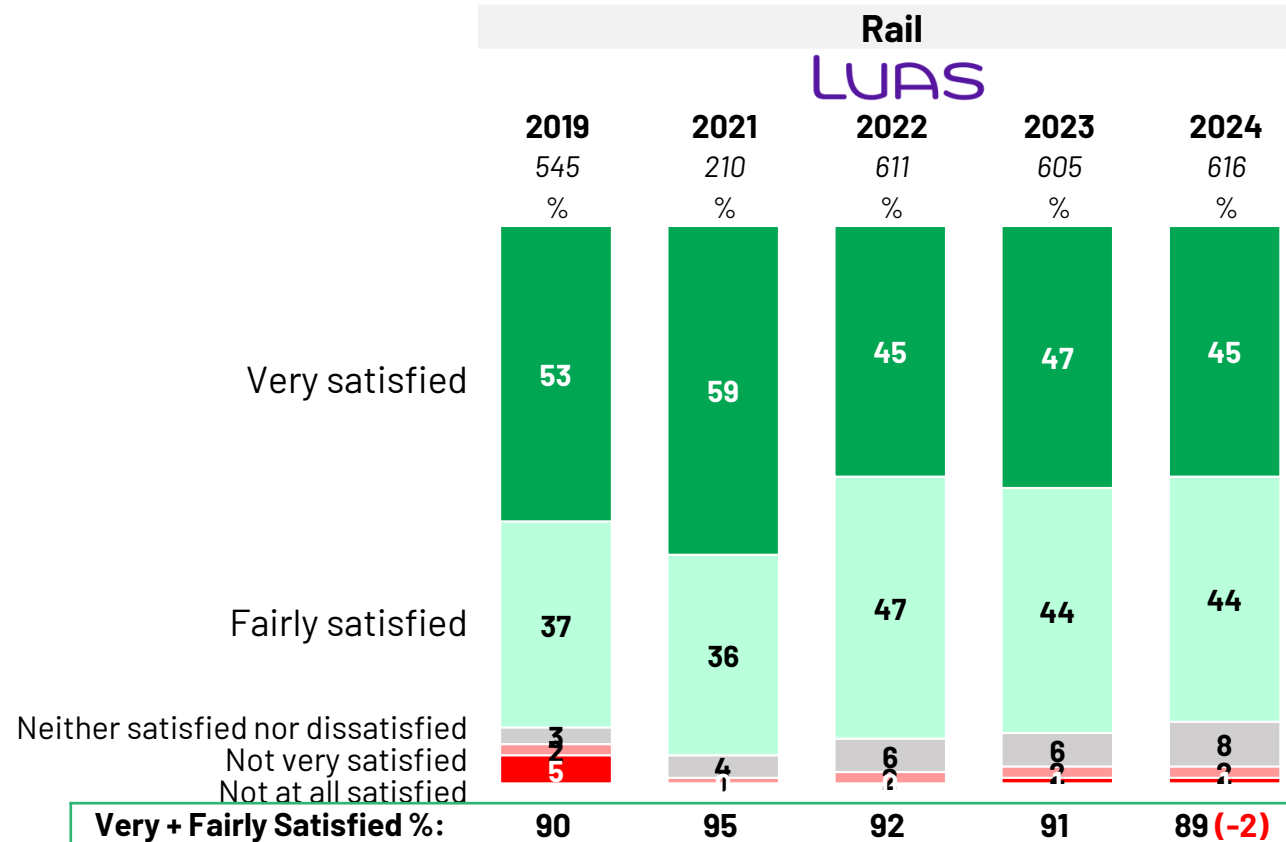
() +/- vs. 2023

Q.2 How satisfied or dissatisfied are you with the service provided by [TRANSPORT PROVIDER] overall?
Base: All Rail Users



Satisfaction with Luas

Almost 9 in 10 are satisfied with Luas and this result is relatively stable, year over year.



() +/- vs. 2023

Q.2 How satisfied or dissatisfied are you with the service provided by [TRANSPORT PROVIDER] overall?
Base: All LUAS Users



Key Reasons for Satisfaction and Dissatisfaction with TFI Buses

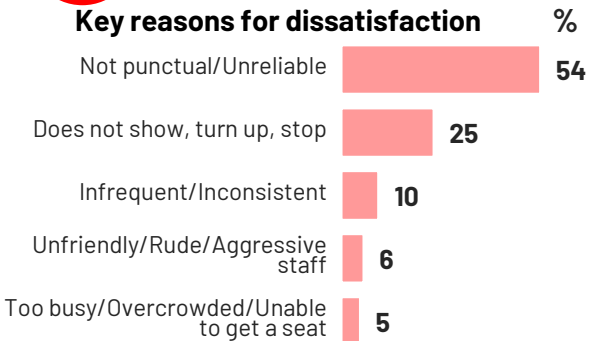
Excellent service and reliability top satisfaction drivers.



77% Very/fairly satisfied
Base: 1,240



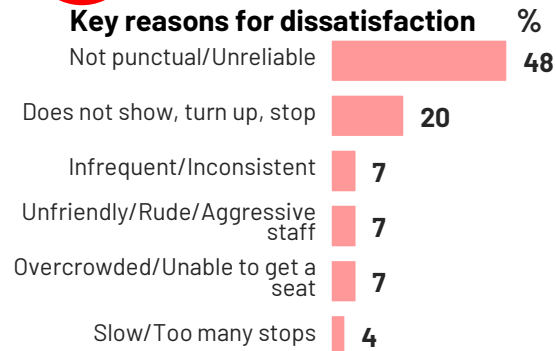
12% Very/fairly dissatisfied
Small Base: 191



69% Very/fairly satisfied
Base: 623



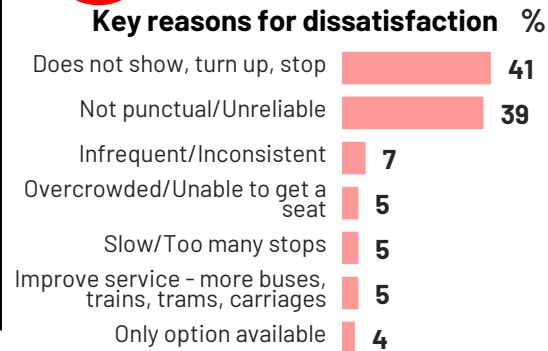
16% Very/fairly dissatisfied
Small Base: 147



82% Very/fairly satisfied
Base: 512



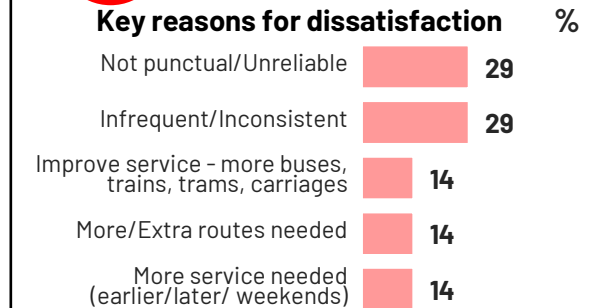
9% Very/fairly dissatisfied
Small Base: 56*



90% Very/fairly satisfied
Base: 199



3% Very/fairly dissatisfied
Small Base: 7*

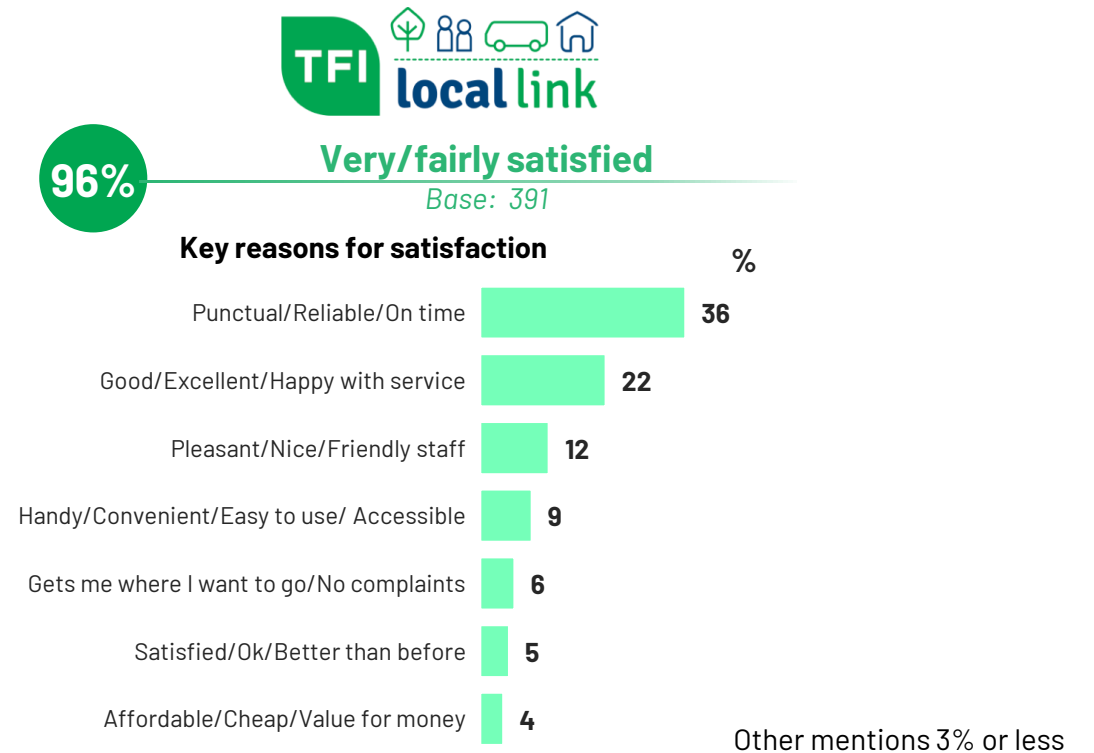


Q3 You said you were [SATISFACTION RESPONSE] overall with the service provided. Please could you tell us the main reasons for this?
Base: Bus Users



Key Reasons for Satisfaction and Dissatisfaction with Other Buses

Excellent service and reliability top satisfaction drivers.

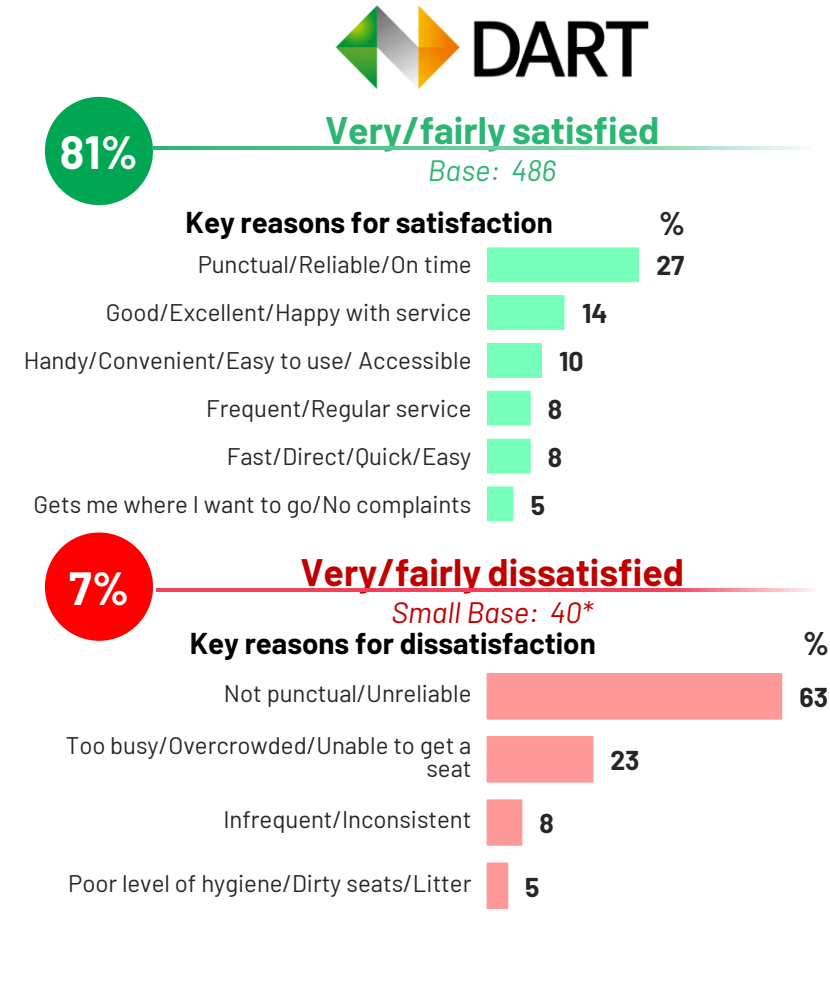
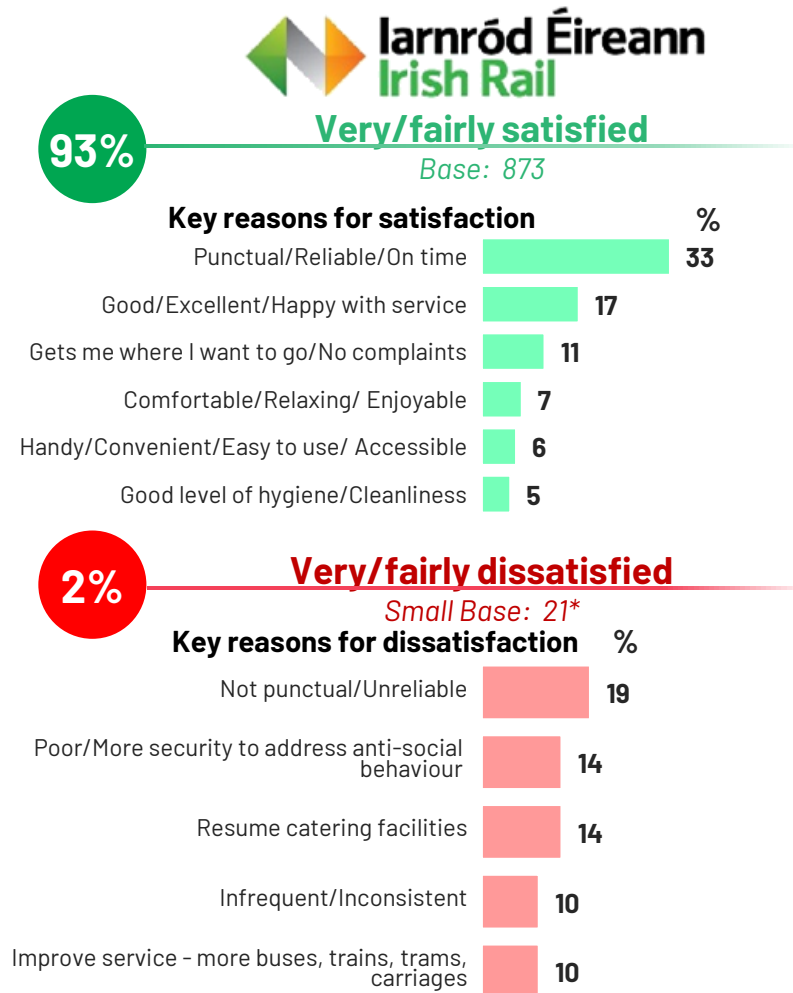


None was very or fairly dissatisfied with Kilkenny Buses or TFI Local Link

Q3 You said you were [SATISFACTION RESPONSE] overall with the service provided. Please could you tell us the main reasons for this?
Base: Bus users

Key Reasons for Satisfaction and Dissatisfaction with Rail Modes

Punctuality and reliability top reasons for satisfaction.

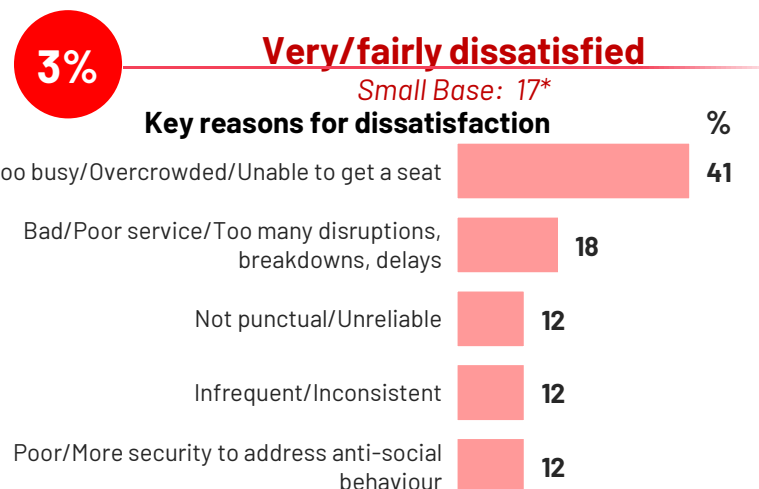
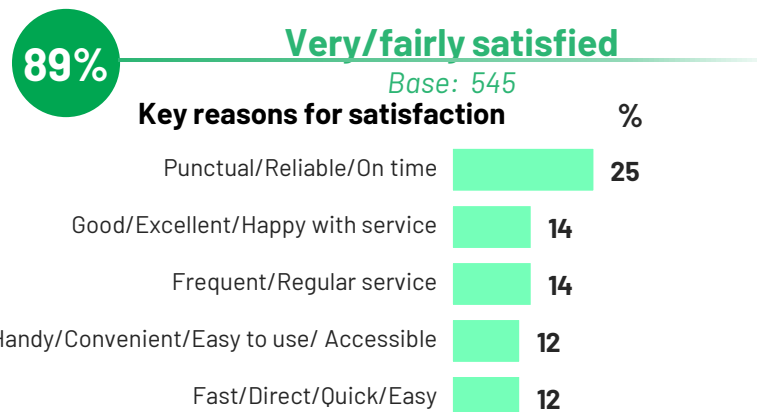


Q3 You said you were [SATISFACTION RESPONSE] overall with the service provided. Please could you tell us the main reasons for this?
Base: Rail Users

Key reasons for Satisfaction and Dissatisfaction with Luas

Punctuality and reliability are the top reasons for satisfaction for Luas. The small number that are unsatisfied with the service, mentioned overcrowding as key reason for dissatisfaction.

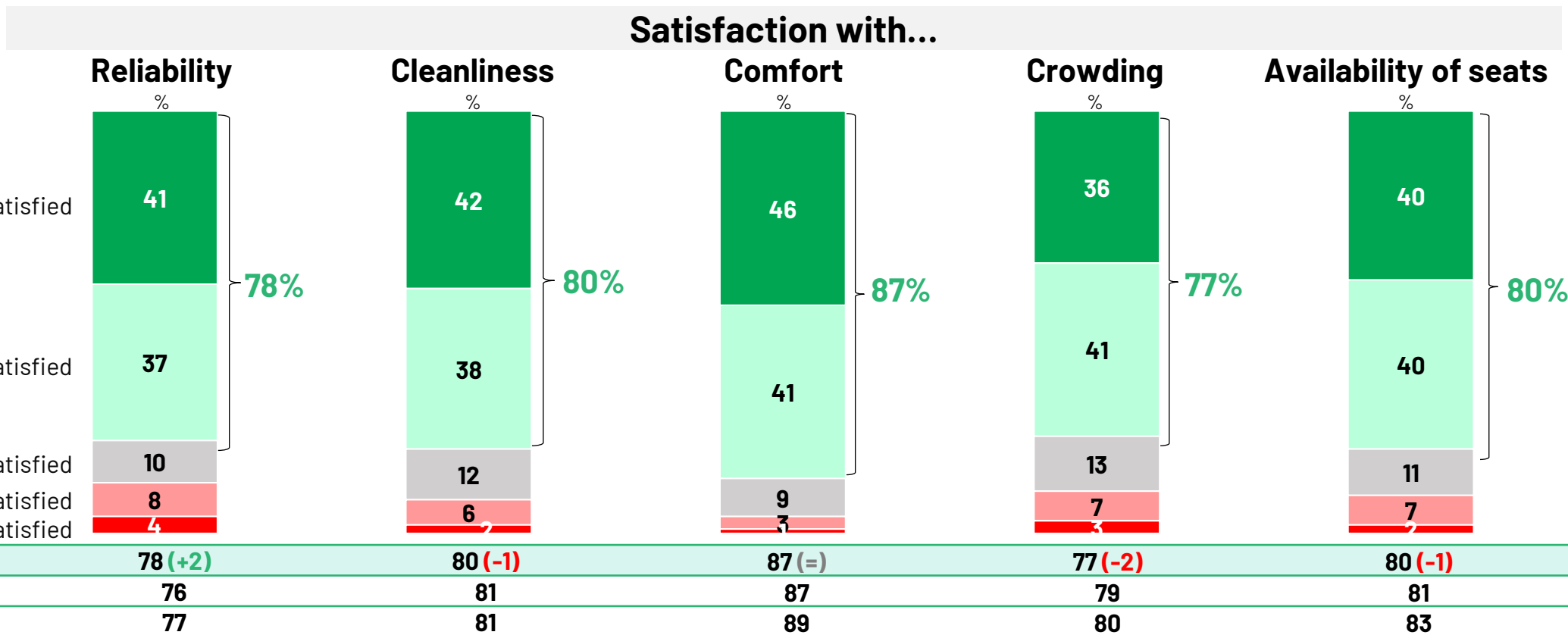
LUAS



Q3 You said you were [SATISFACTION RESPONSE] overall with the service provided. Please could you tell us the main reasons for this?
 Base: Luas Users

Overall Satisfaction with Key Travel Attributes

About four in five are satisfied across attributes and satisfaction is relatively stable in comparison to last year. Reliability satisfaction has improved and satisfaction with crowding declined.



() +/- vs. 2023







Q.8A How satisfied or dissatisfied are you with the reliability of the bus/train/tram arriving on time?
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with cleanliness
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with comfort of the vehicle
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats

Base: All Public Transport users-6,139



Satisfaction with Key Travel Attributes by Bus Modes

Satisfaction is generally strong across attributes and operators. TFI Local Link best rated, while the lowest score is registered with the reliability of Bus Éireann service.







	 Bus Éireann	 Dublin Bus	 Dublin	 Kildare	 KILKENNY BUSES	 TFI local link
	1,619	913	622	220	200	407
	%	%	%	%	%	%
Reliability (very+ fairly satisfied)	62	75	72	82	90	94
Cleanliness (very+ fairly satisfied)	79	77	78	90	99	97
Comfort (very+ fairly satisfied)	87	86	88	95	99	98
Crowding (very+ fairly satisfied)	81	80	79	92	86	92
Availability of seats (very+ fairly satisfied)	85	80	85	92	94	94

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 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats

Base: Bus Users

Satisfaction with Key Travel Attributes by Bus Modes: Differences Vs 2023

All bus operators, (exception Bus Éireann) registered improvements in reliability in comparison to last year. Bus Éireann also registered declines with crowding and availability of seats.

	 Bus Éireann	 Dublin Bus	 Dublin	 Kildare	 KILKENNY BUSES	 TFI local link
	1,619	913	622	220	200	407
	%	%	%	%	%	%
Reliability (very+ fairly satisfied)	-7	+9	+9	+8	+1	+8
Cleanliness (very+ fairly satisfied)	-1	+5	=	-4	=	-2
Comfort (very+ fairly satisfied)	-2	+6	+3	+1	=	+1
Crowding (very+ fairly satisfied)	-5	+2	=	=	-12	+10
Availability of seats (very+ fairly satisfied)	-5	+1	=	+1	-5	+9



Q.8A How satisfied or dissatisfied are you with the reliability of the bus/train/tram arriving on time?
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with cleanliness
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with comfort of the vehicle
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats

Base: Bus Users



Satisfaction with Key Travel Attributes by Rail Modes

DART rated less well in all aspects in comparison to Irish Rail.



	 Iarnród Éireann Irish Rail	 DART
	940	602
	%	%
Reliability (very+ fairly satisfied)	94	82
Cleanliness (very+ fairly satisfied)	84	67
Comfort (very+ fairly satisfied)	90	77
Crowding (very+ fairly satisfied)	76	69
Availability of seats (very+ fairly satisfied)	79	69

Q.8A How satisfied or dissatisfied are you with the reliability of the bus/train/tram arriving on time?
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with cleanliness
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with comfort of the vehicle
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats

Base: Rail Users

Satisfaction with Key Travel Attributes by Rail Modes: Differences Vs 2023

DART registered improvements in reliability but has declined with cleanliness and availability of seats. Small improvements for Irish Rail across travel attributes.

	 Iarnród Éireann Irish Rail	 DART
	940	602
	%	%
Reliability (very+ fairly satisfied)	+2	+5
Cleanliness (very+ fairly satisfied)	+1	-3
Comfort (very+ fairly satisfied)	+1	-1
Crowding (very+ fairly satisfied)	+4	-1
Availability of seats (very+ fairly satisfied)	+4	-4

- Q.8A How satisfied or dissatisfied are you with the reliability of the bus/train/tram arriving on time?
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- Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats

Base: Rail Users



Satisfaction with Key Travel Attributes by Luas

Strong satisfaction with the reliability of Luas while only half of users in satisfied with crowding and availability of seats.

	LUAS
	616
	%
Reliability (very+ fairly satisfied)	90
Cleanliness (very+ fairly satisfied)	77
Comfort (very+ fairly satisfied)	80
Crowding (very+ fairly satisfied)	51
Availability of seats (very+ fairly satisfied)	51

Q.8A How satisfied or dissatisfied are you with the reliability of the bus/train/tram arriving on time?

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with cleanliness

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with comfort of the vehicle

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats

Base: Luas Users



Satisfaction with Key Travel Attributes by Luas: Differences Vs 2023

Declines in satisfaction with crowding and availability of seats since last year.

	LUAS
	616
	%
Reliability (very+ fairly satisfied)	+1
Cleanliness (very+ fairly satisfied)	-2
Comfort (very+ fairly satisfied)	-4
Crowding (very+ fairly satisfied)	-12
Availability of seats (very+ fairly satisfied)	-12

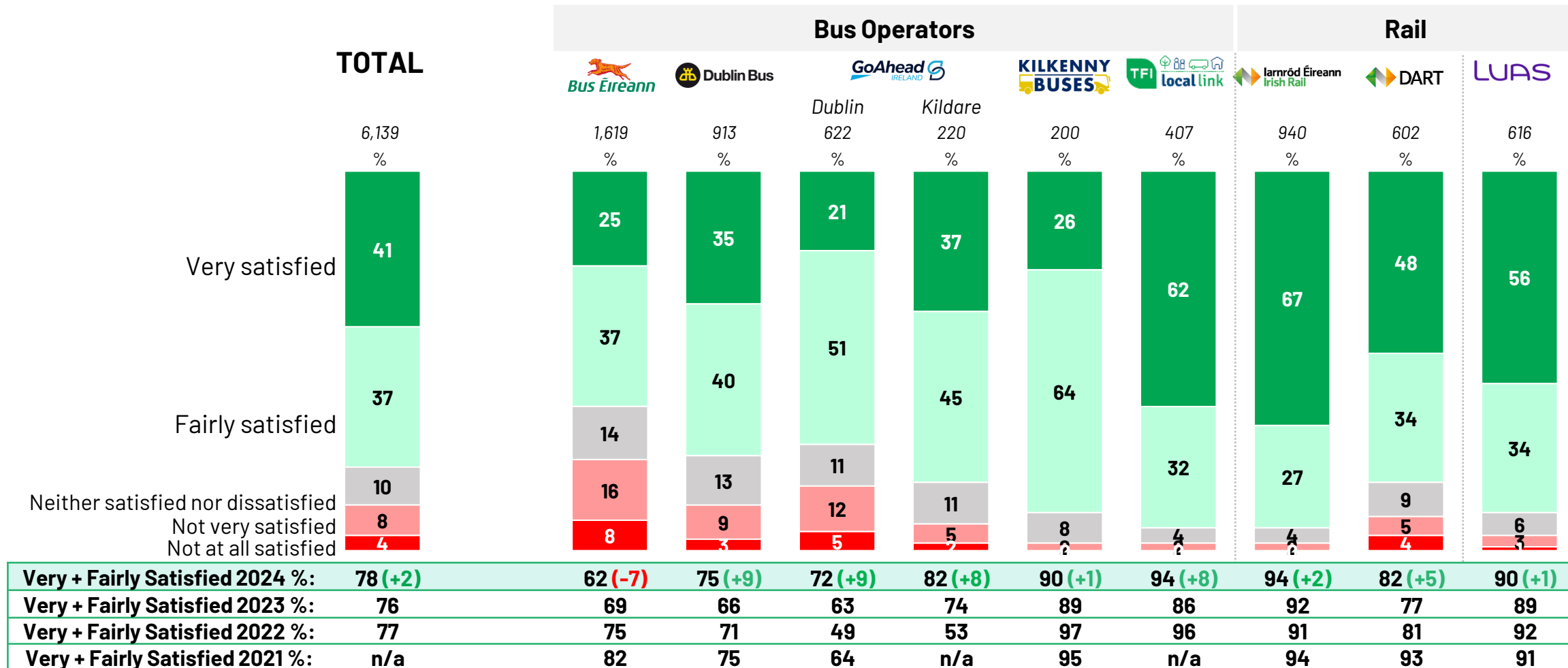
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 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside
 Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats

Base: Luas Users



Reliability: All Operators

Almost 8 in 10 are satisfied with the reliability of the service. Significant improvements for several operators. Decline for Bus Éireann.



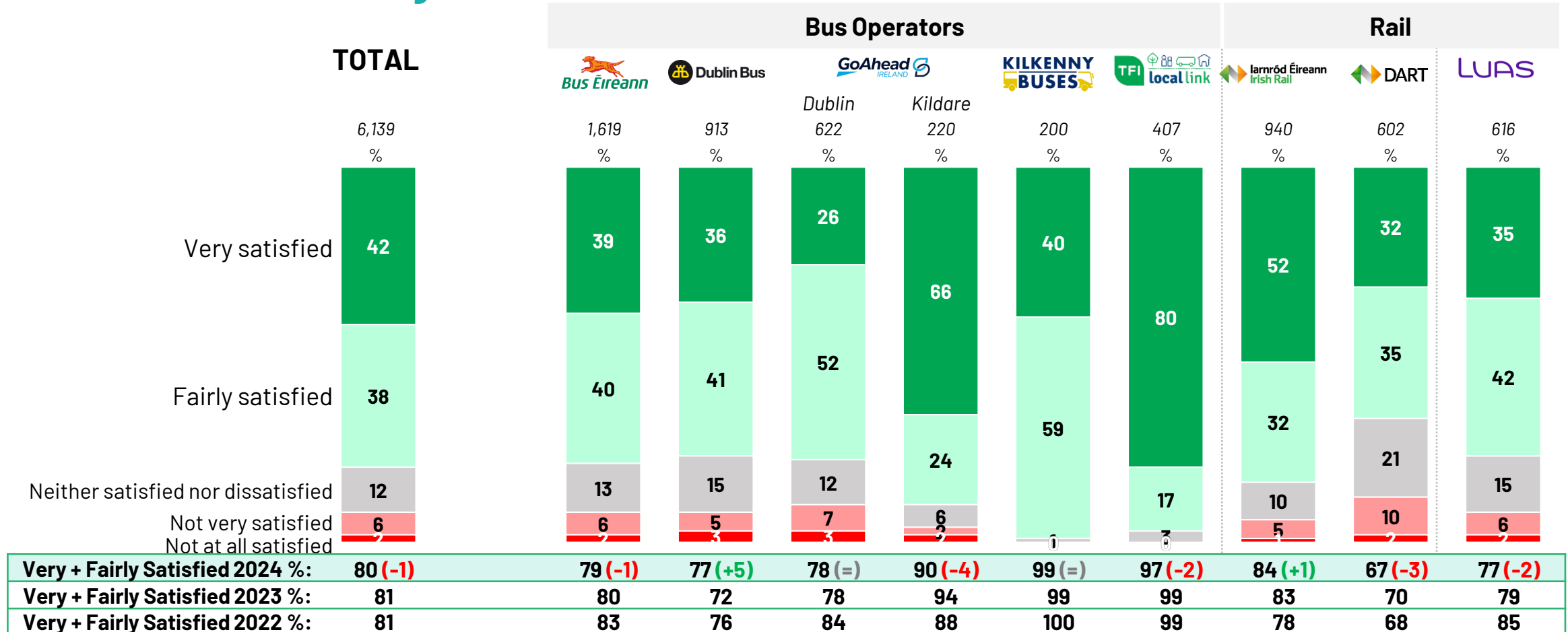
() +/- vs. 2023

Q.8A How satisfied or dissatisfied are you with the reliability of the bus/train/tram arriving on time?
Base: All Public Transport users



Cleanliness: All Operators

Satisfaction with cleanliness across operators is generally high with around 8 in 10 users satisfied. The lowest satisfaction is registered for DART.



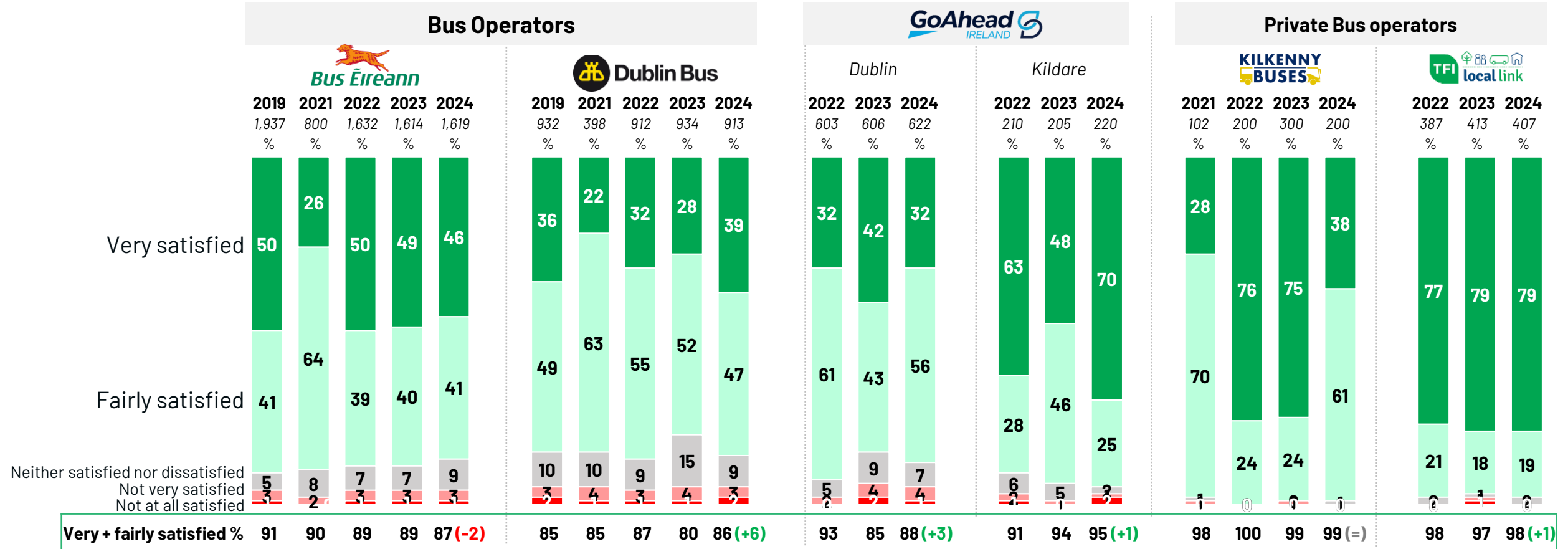
() +/- vs. 2023

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with cleanliness?
Base: All Public Transport users



Comfort: Buses

Satisfaction with comfort is very high and relatively consistent across operators. Comfort on Dublin Bus remains marginally lower in comparison to the other operators but improved since last year.



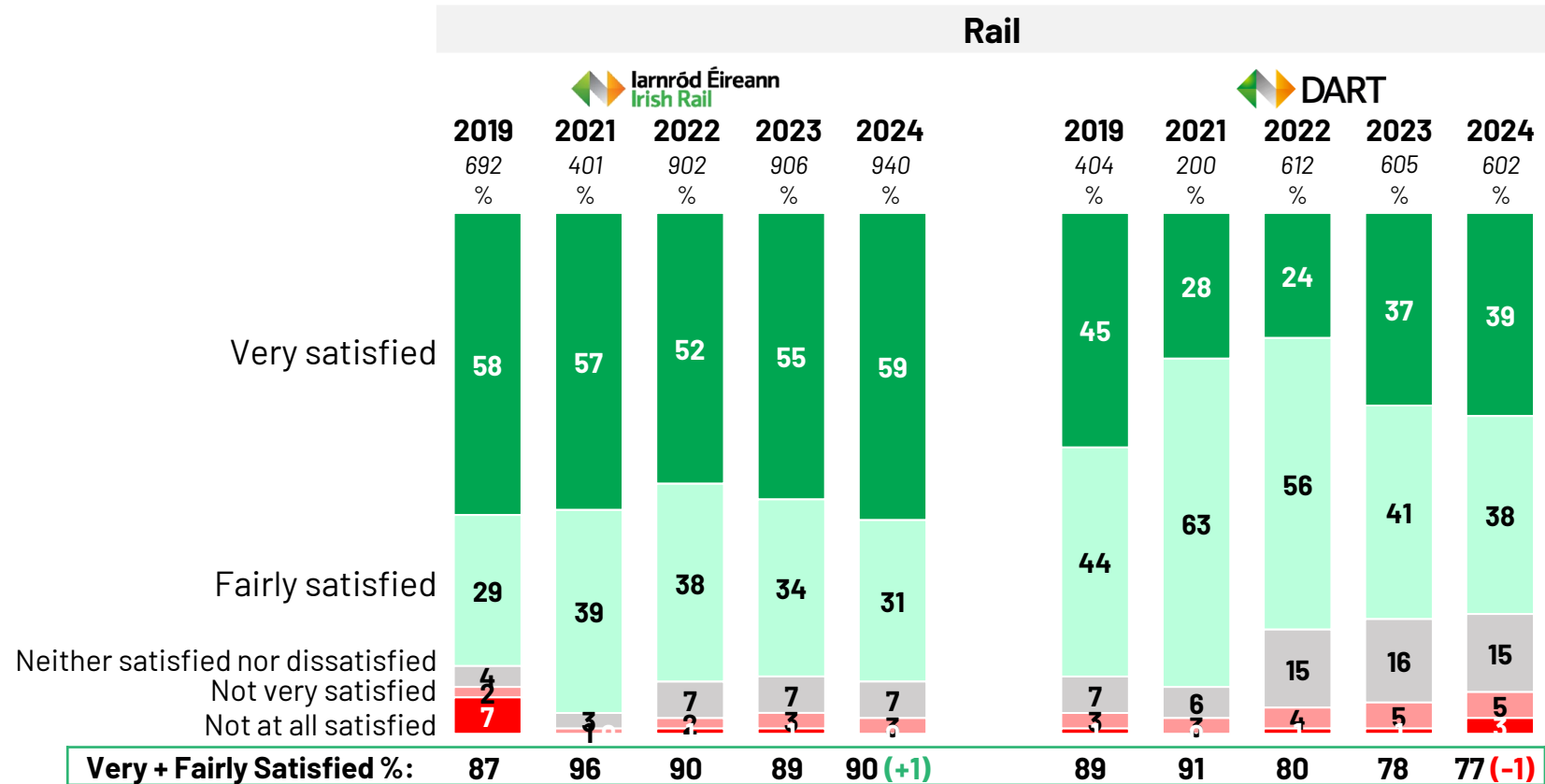
() +/- vs. 2023

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with comfort of the vehicle?
Base: All Bus Users



Comfort: Rail Modes

Strong satisfaction with comfort for Irish Rail. Lower satisfaction with comfort on DART.

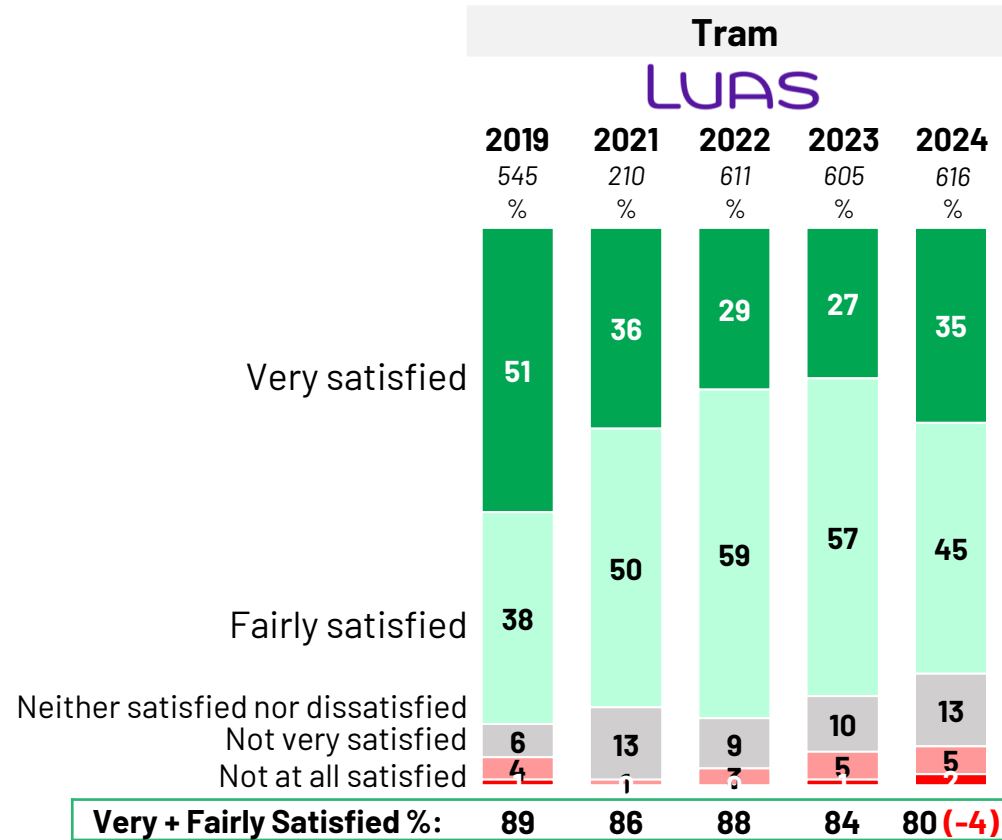


() +/- vs. 2023

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with comfort of the vehicle?
Base: All Rail users

Comfort: Luas

8 in 10 users are satisfied with the comfort of Luas vehicles which has declined in comparison to last year.



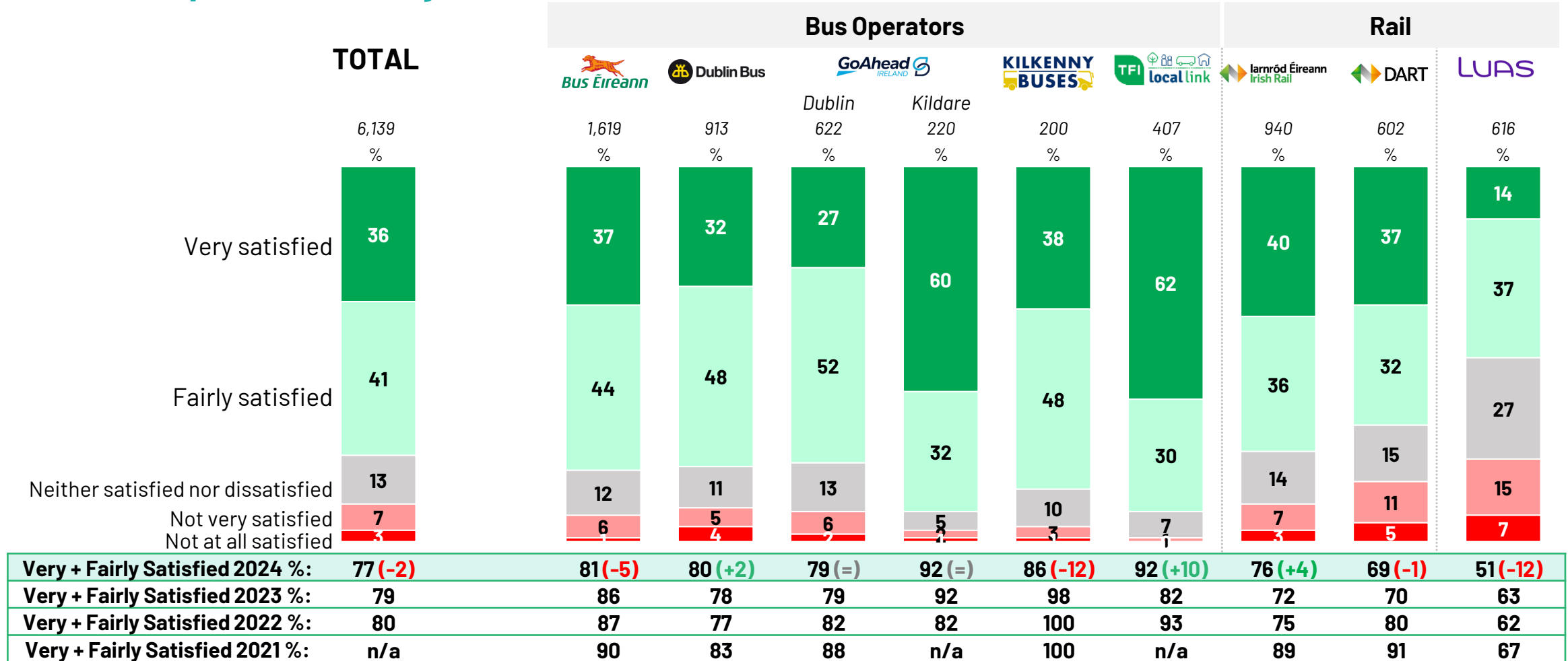
() +/- vs. 2023

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with comfort of the vehicle?
Base: All Luas users



Crowding: All Operators

TFI Local Link scores best on crowding. Only half of Luas users are satisfied with crowding which is a decline in comparison to last year.



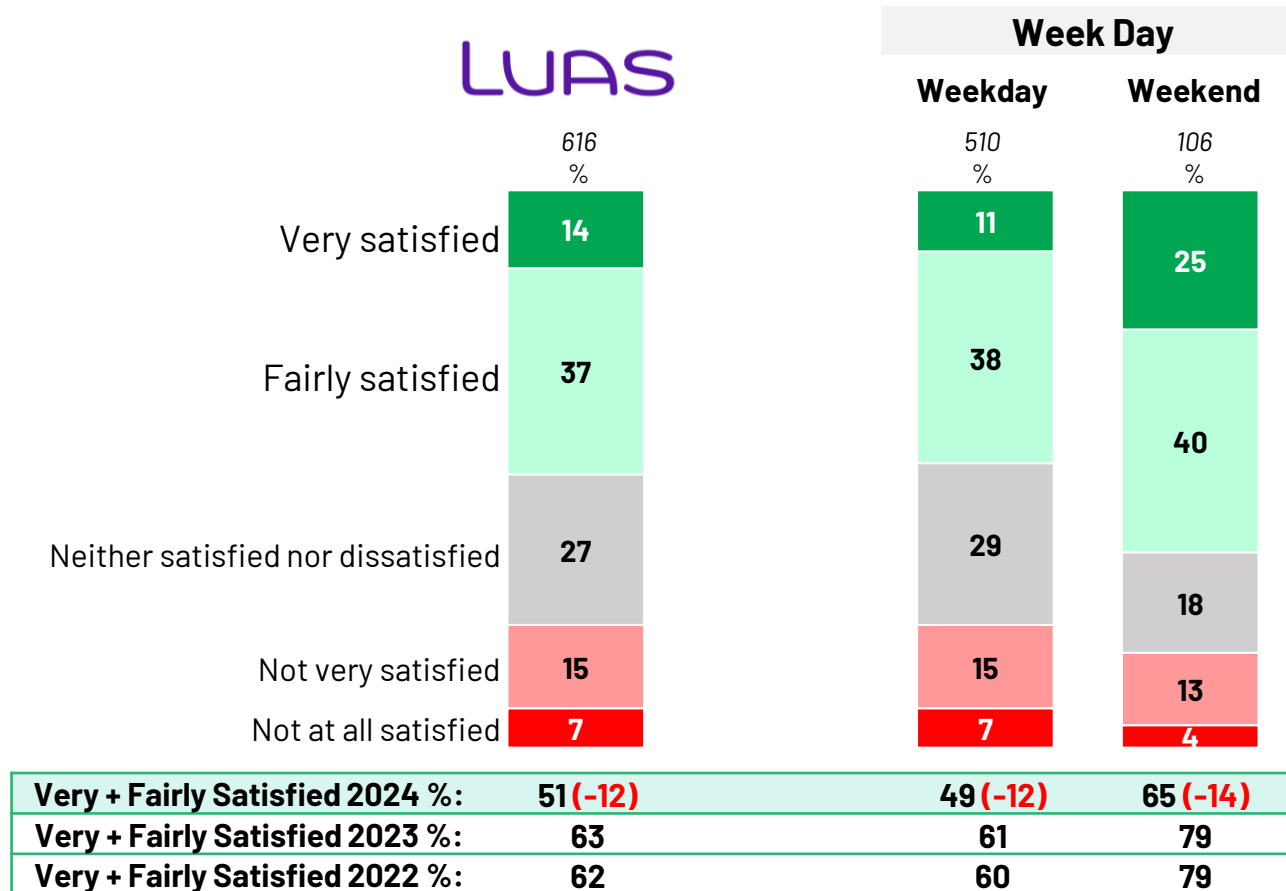
() +/- vs. 2023

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside
Base: All Public Transport users



Crowding: Luas in focus

Satisfaction with crowding on Luas is significantly lower on weekdays in comparison to weekends but satisfaction declined on both.



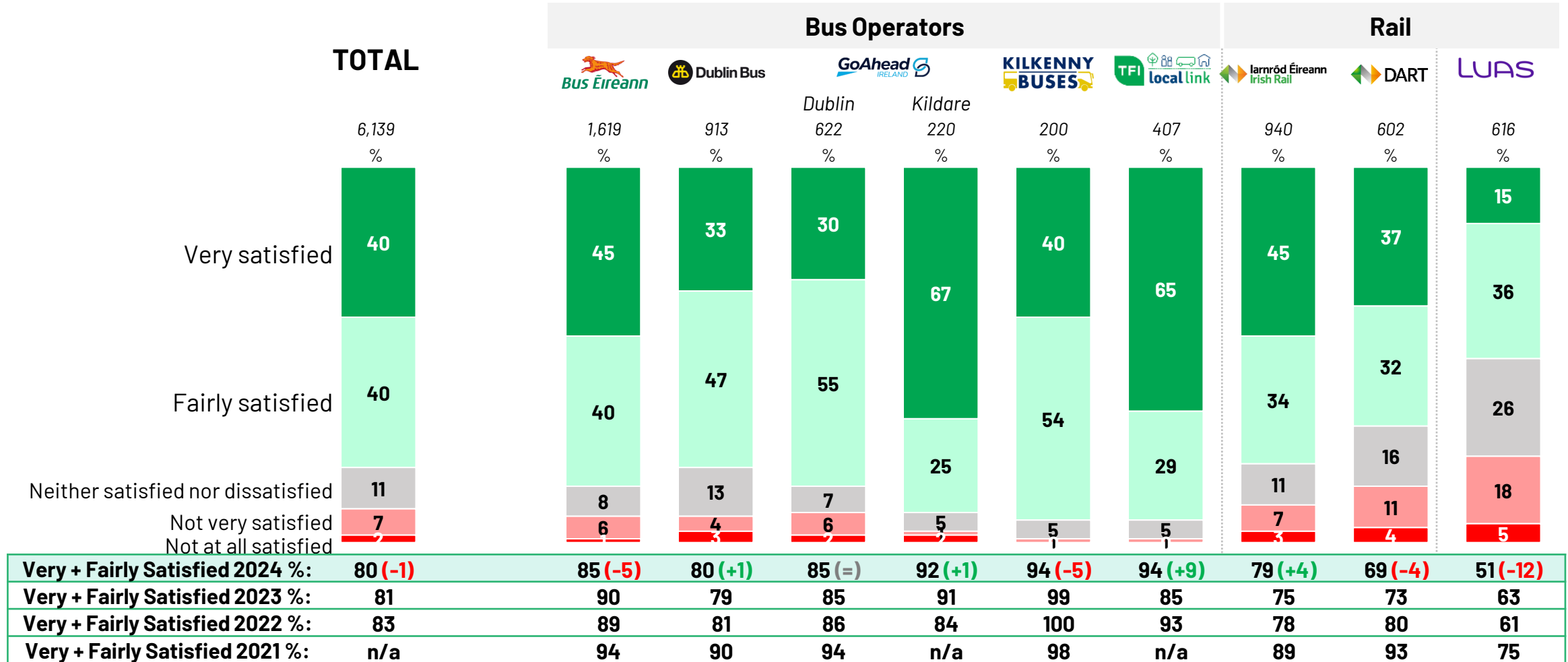
() +/- vs. 2023

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the level of crowding inside
Base: All Luas users



Availability of Seats: All Operators

8 in 10 users satisfied with most operators. Lowest scores registered for DART and Luas.



() +/- vs. 2023

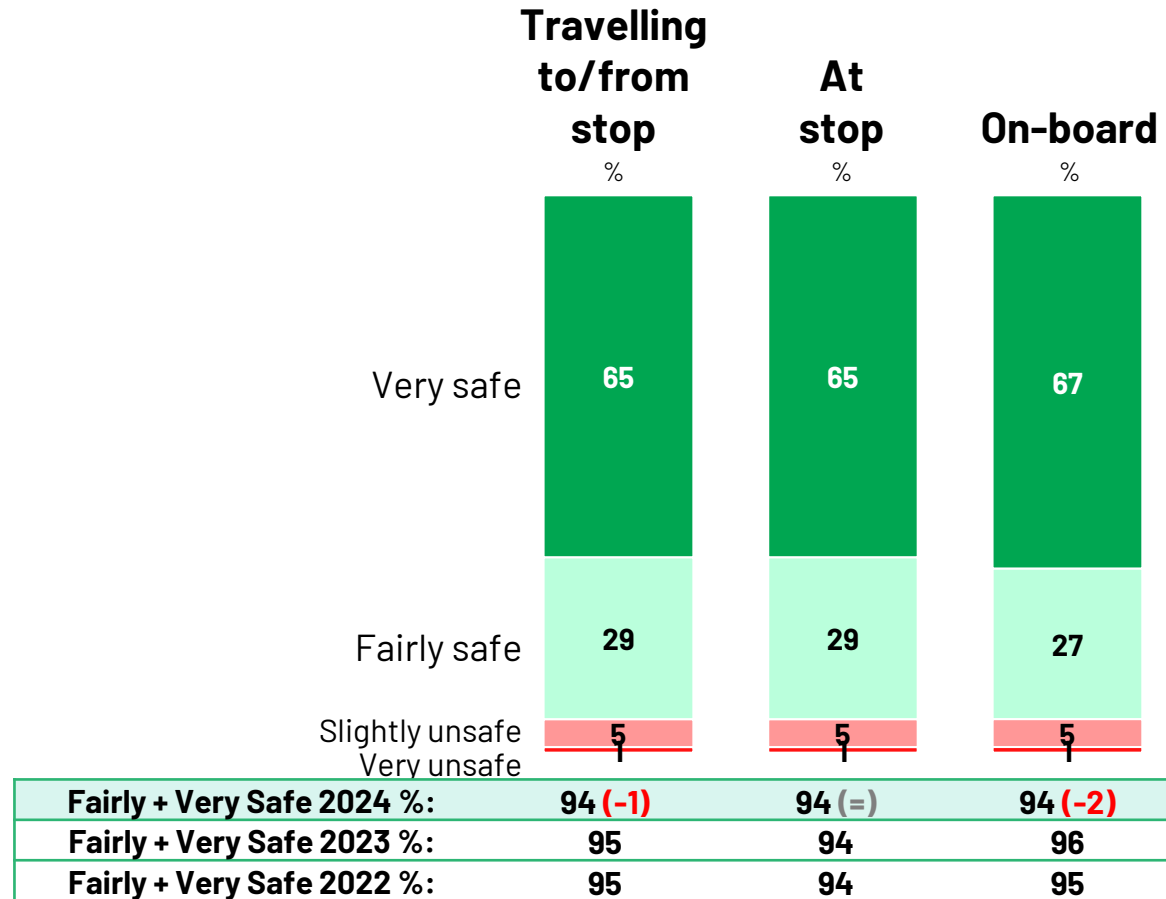
Note: Local Link added in 2022, sample structure changed for Go Ahead in 2022

Q.6 Thinking about the train/bus/tram you normally travel on, how satisfied or dissatisfied are you with the availability of seats?
Base: All Public Transport users



Feeling Safe

Feeling safe is high with almost all users feeling safe and about 2 in 3 of them feeling very safe across all the stages of their journey.



() +/- vs. 2023

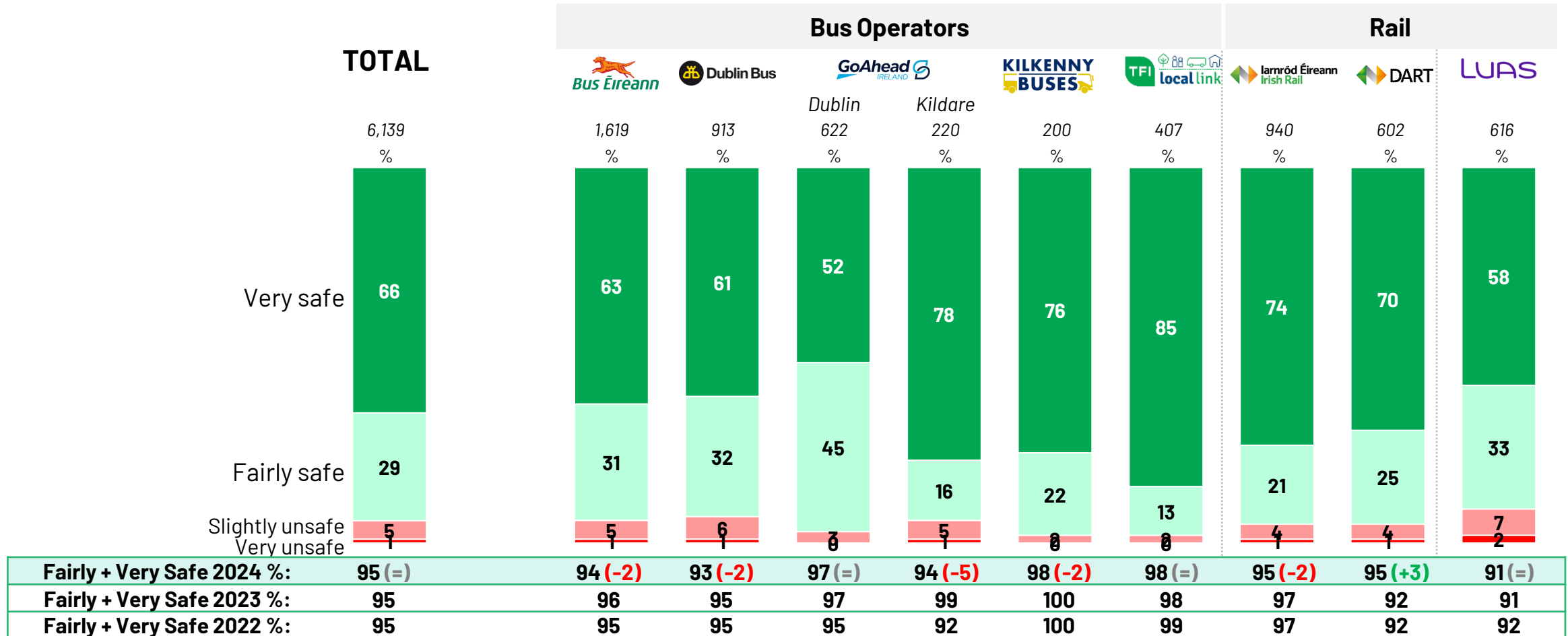
Note: Question not asked in 2021

Q.7 Thinking about the bus/train/tram you usually use how safe do you feel in the following situations?
 a) Walking to and from the transport stop; b) While waiting at the transport stop; c) While on board the transport
 Base: All Public Transport users-6,139



Safety Walking To and From the Stop: All Operators

Lower incidence of feeling 'very safe' walking to and from Luas and Go-Ahead Dublin bus stops.



() +/- vs. 2023

Note: Question not asked in 2021

Q.7 Thinking about the bus/train/tram you usually use how safe do you feel in the following situations?

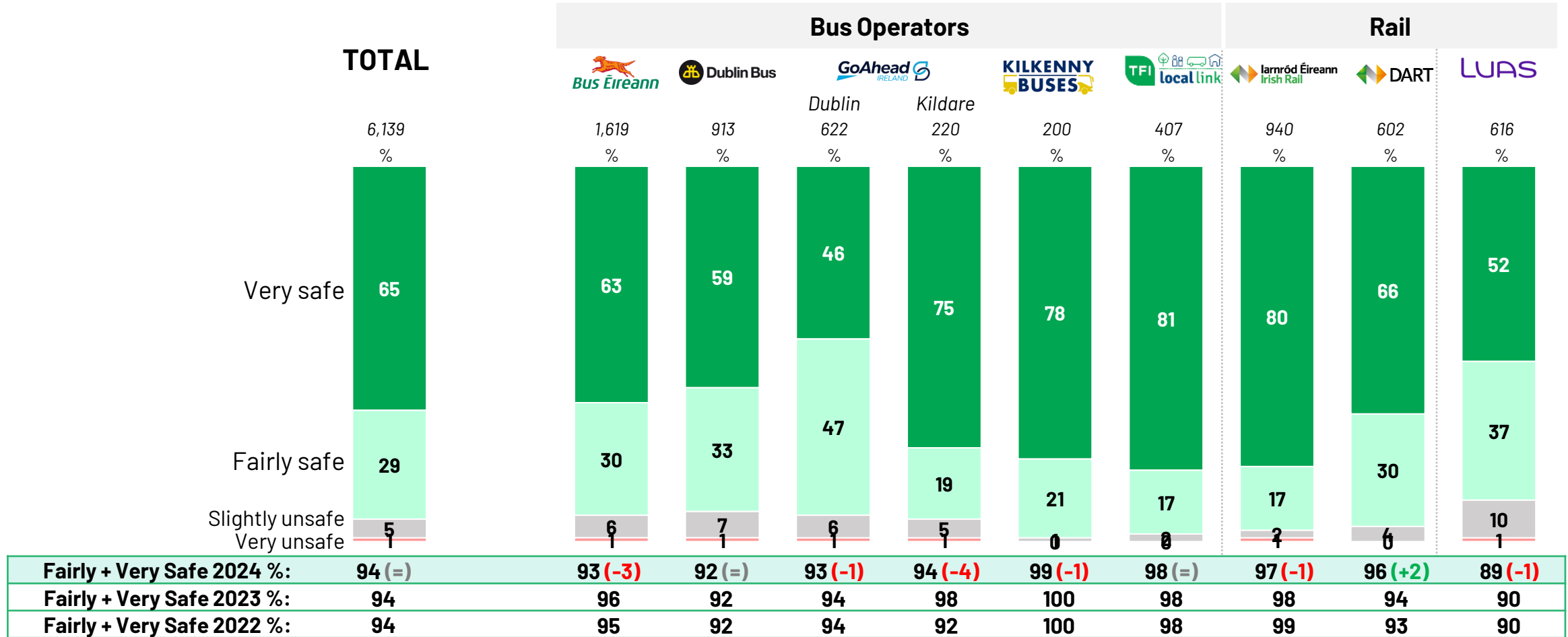
a) Walking to and from the transport stop

Base: All Public Transport users



Safety at the Stop: All Operators

Incidence of feeling 'very safe' is at the lowest for Go-Ahead Dublin and Luas.



() +/- vs. 2023

Note: Question not asked in 2021

Q.7 Thinking about the bus/train/tram you usually use how safe do you feel in the following situations?

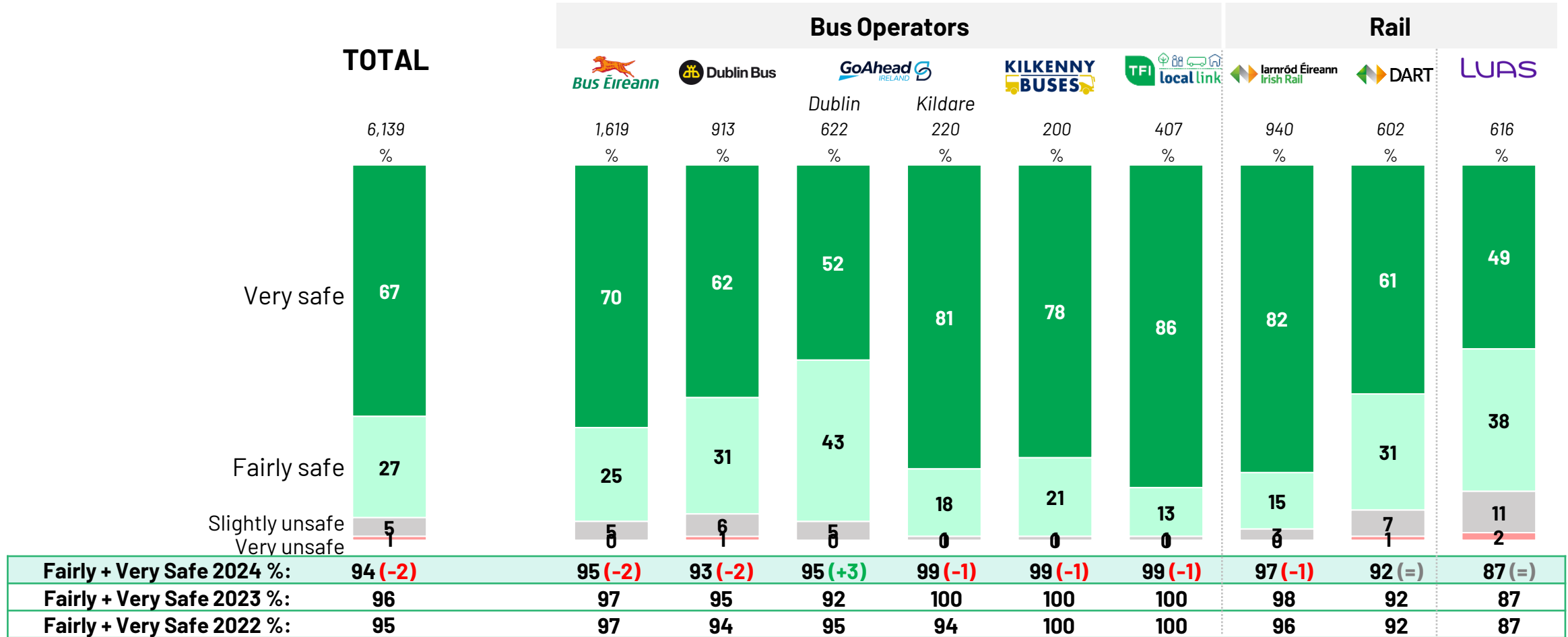
b) While waiting at the transport stop

Base: All Public Transport users



Safety on Board: All Operators

Incidence of feeling 'very safe' is significantly lower on Go-Ahead Dublin and Luas with only half feeling very safe.



() +/- vs. 2023

Note: Question not asked in 2021

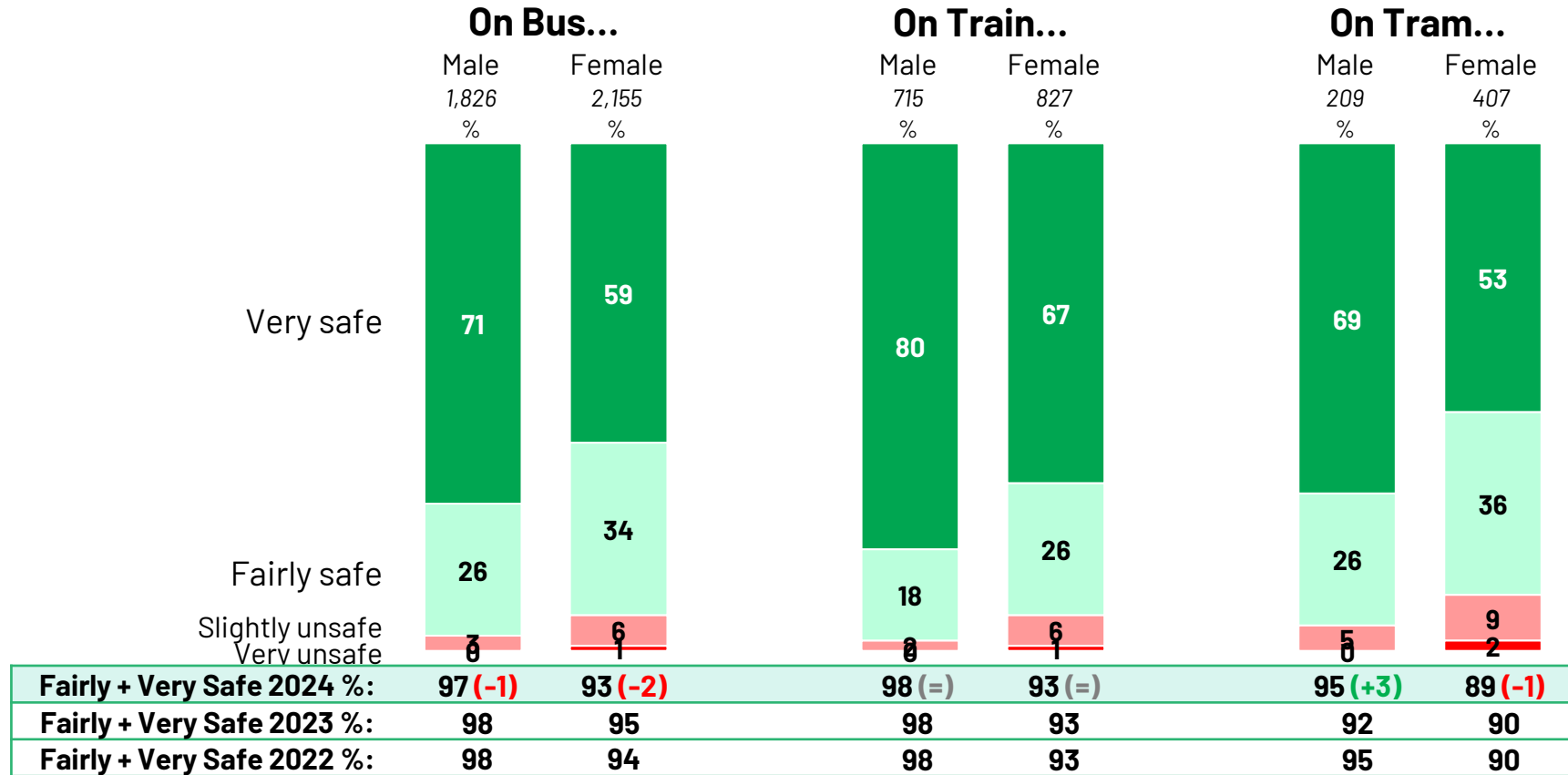
Q.7 Thinking about the bus/train/tram you usually use how safe do you feel in the following situations?

c) While on board the transport
Base: All Public Transport users



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 stops.



() +/- vs. 2023

Note: Question not asked in 2021

Q.7 Thinking about the bus/train/tram you usually use how safe do you feel in the following situations?

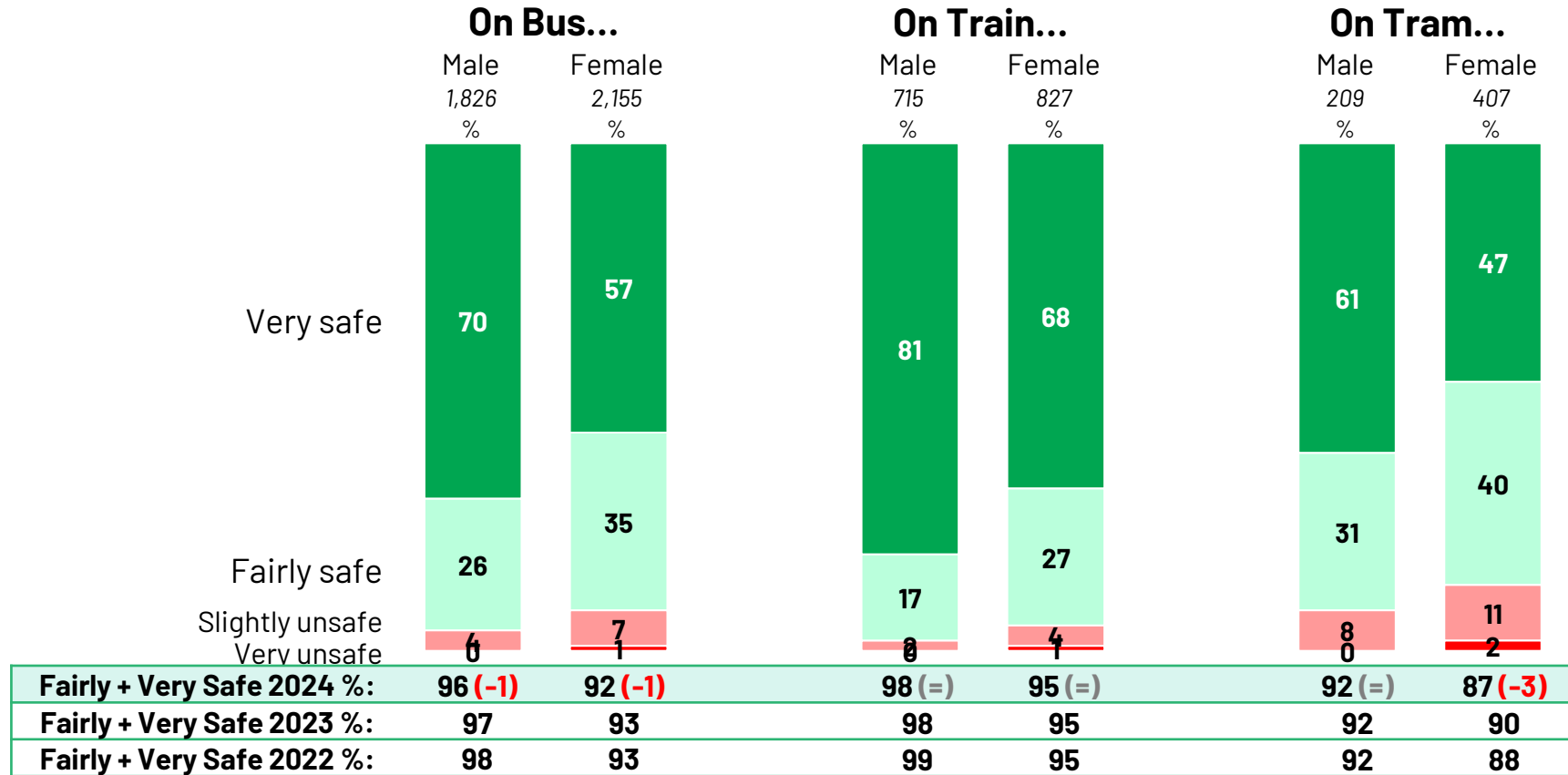
a) Walking to and from the transport stop

Base: All Public Transport users



Safety at the Stop by Gender

Feeling very safe is lower for women especially on tram.



() +/- vs. 2023

Note: Question not asked in 2021

Q.7 Thinking about the bus/train/tram you usually use how safe do you feel in the following situations?

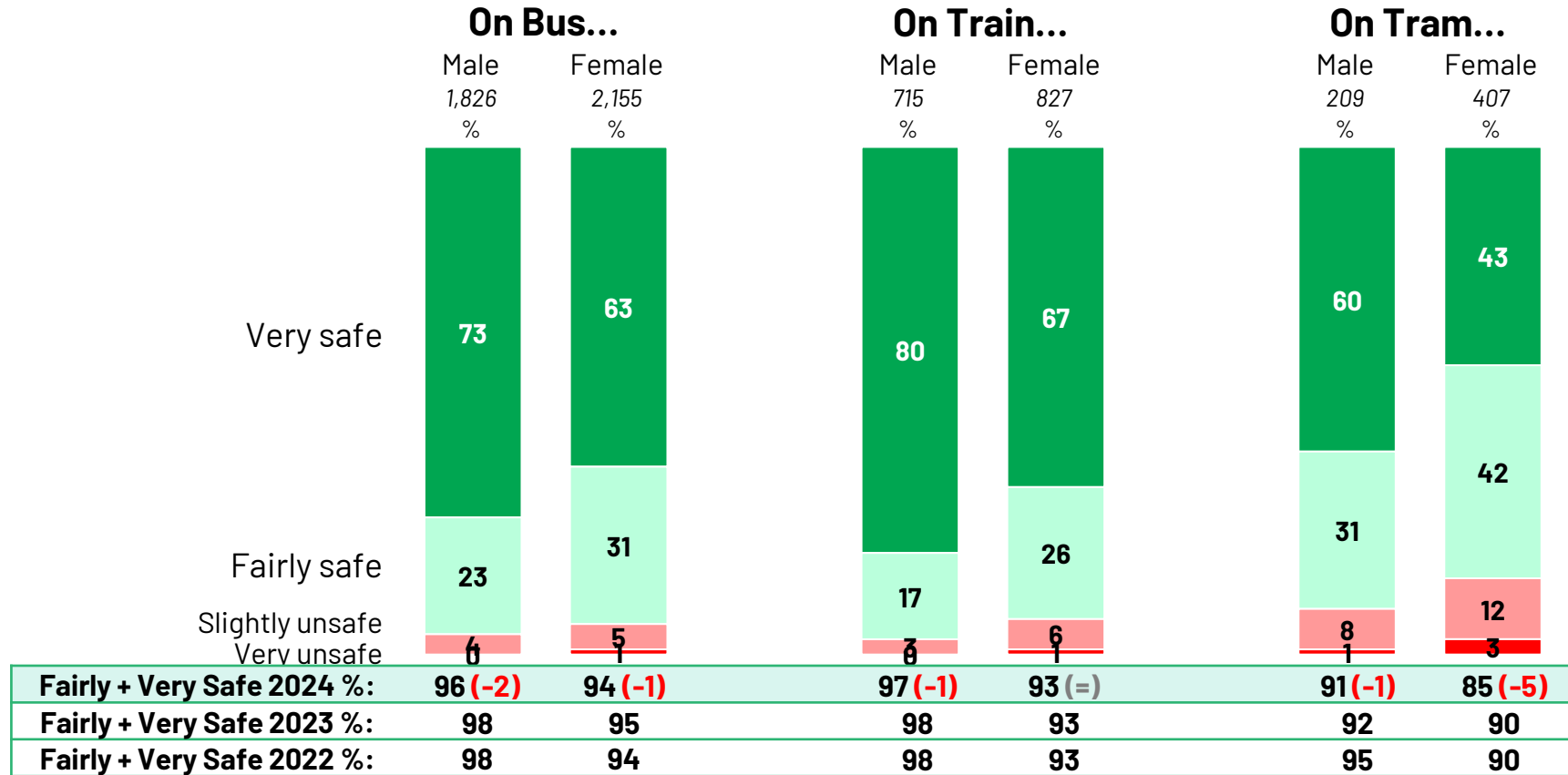
b) While waiting at the transport stop

Base: All Public Transport users



Safety on Board by Gender

Women tend to feel less safe on board and this is especially the case on tram.



() +/- vs. 2023

Note: Question not asked in 2021

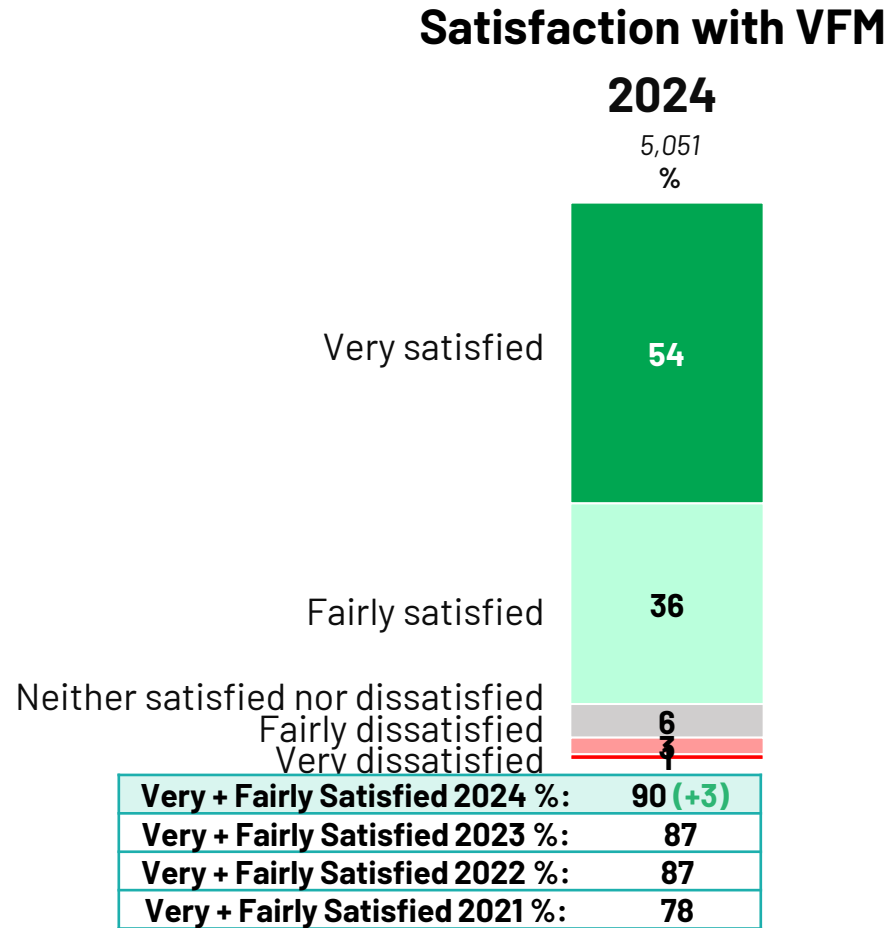
Q.7 Thinking about the bus/train/tram you usually use how safe do you feel in the following situations?

c) While on board the transport
Base: All Public Transport users



Value for Money (VFM)

9 in 10 are satisfied with value for money which is an increase in comparison to last year.



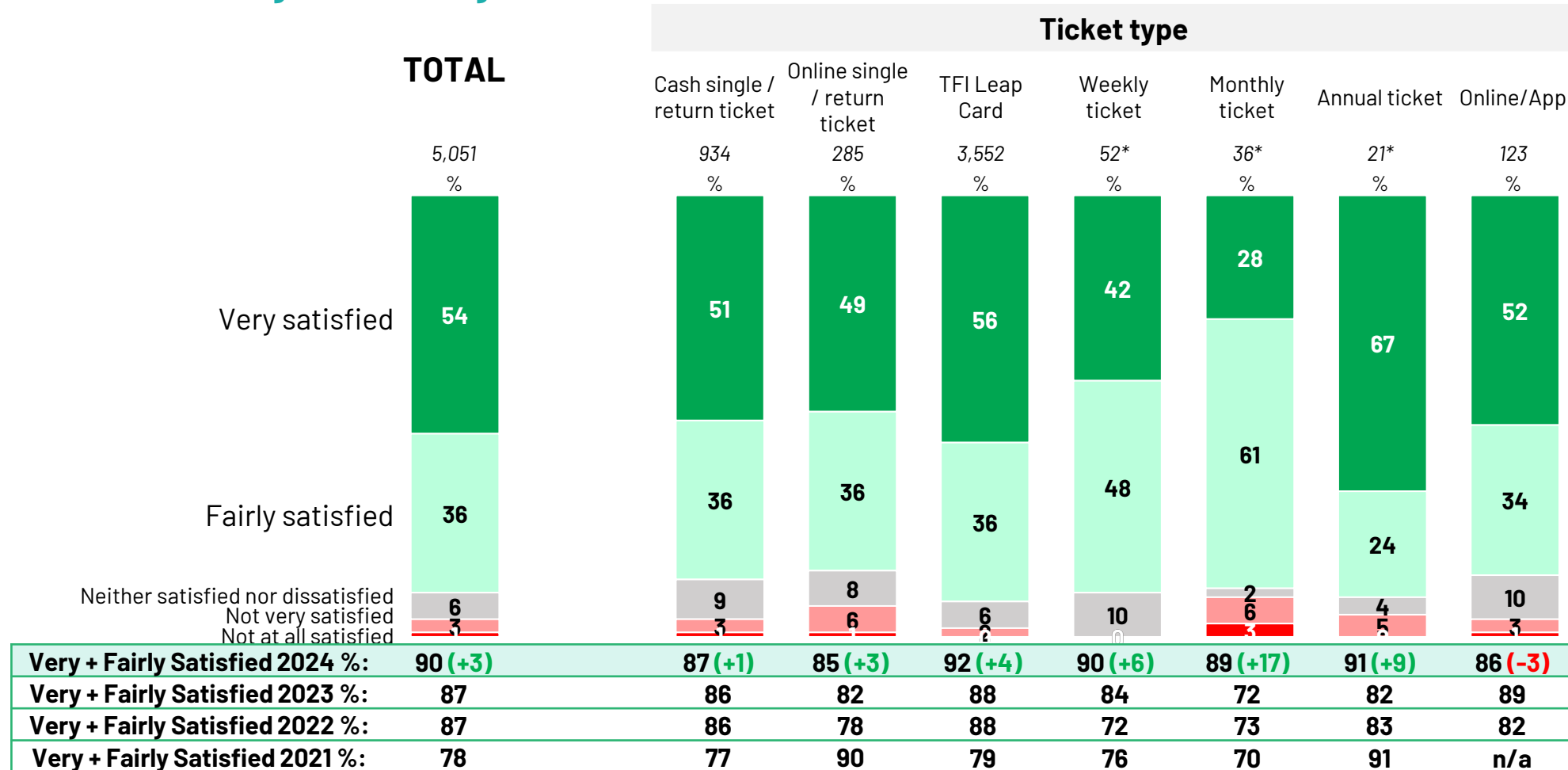
() +/- vs. 2023

Q.11 How satisfied or dissatisfied are you with [TRANSPORT PROVIDER] services in terms of value for money?
Base: All public transport users ex those with free travel pass N= 5,051



Value for Money (VFM) by Ticket Type:

Those with annual tickets are the most likely to be 'very' satisfied while those with monthly tickets are the least likely to be 'very' satisfied.



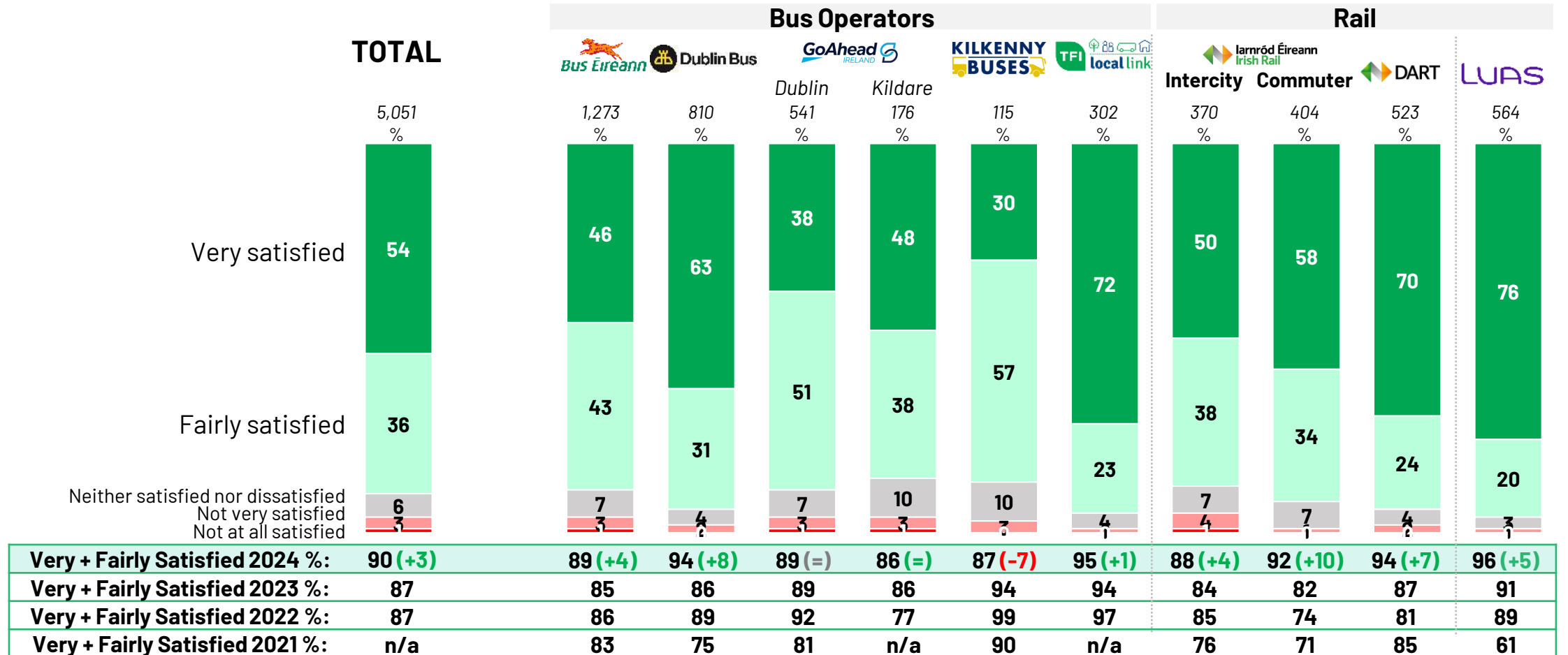
() +/- vs. 2023

Note: Online/App and Student ticket answer options added in 2022

Q.11 How satisfied or dissatisfied are you with [TRANSPORT PROVIDER] services in terms of value for money?
Base: All public transport users ex those with free travel pass N= 5,051

Value for Money (VFM) by Mode

Satisfaction with VFM is high across all the operators and peaks among Luas, Dublin Bus and DART users.



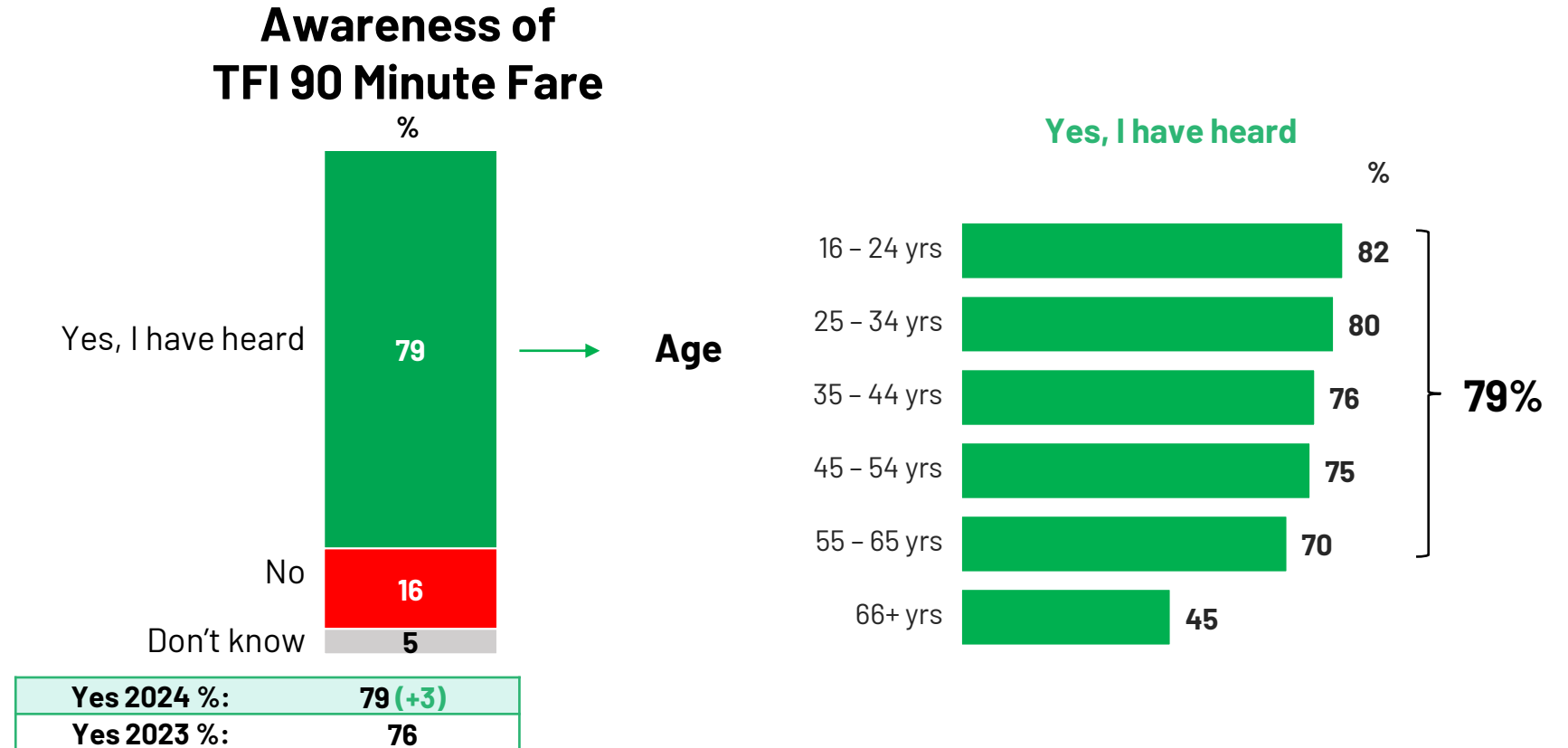
() +/- vs. 2023

Note: Local Link added in 2022, sample structure changed for Go Ahead in 2022

Q.11 How satisfied or dissatisfied are you with [TRANSPORT PROVIDER] services in terms of value for money?
Base: All public transport users ex those with free travel pass N= 5,051

Awareness of TFI 90 minute fare:

Almost 8 in 10 public transport users in the Dublin region are aware of the TFI 90 min fare.



Note: Question added in 2023





Q.12 Have you heard of the TFI 90 minute fare on TFI Leap Card?
Base: All public transport users in Dublin N= 2,427



Awareness Among all Public Transport Users in Dublin



Awareness of TFI 90 minute fare:

	Bus		Rail	Tram
	 Dublin Bus	 GoAhead Dublin	 DART	 LUAS
<i>Base:</i>	810	530	523	564
	%	%	%	%
Yes	80	82	77	75
No	12	12	19	23
Don't know	8	6	4	2

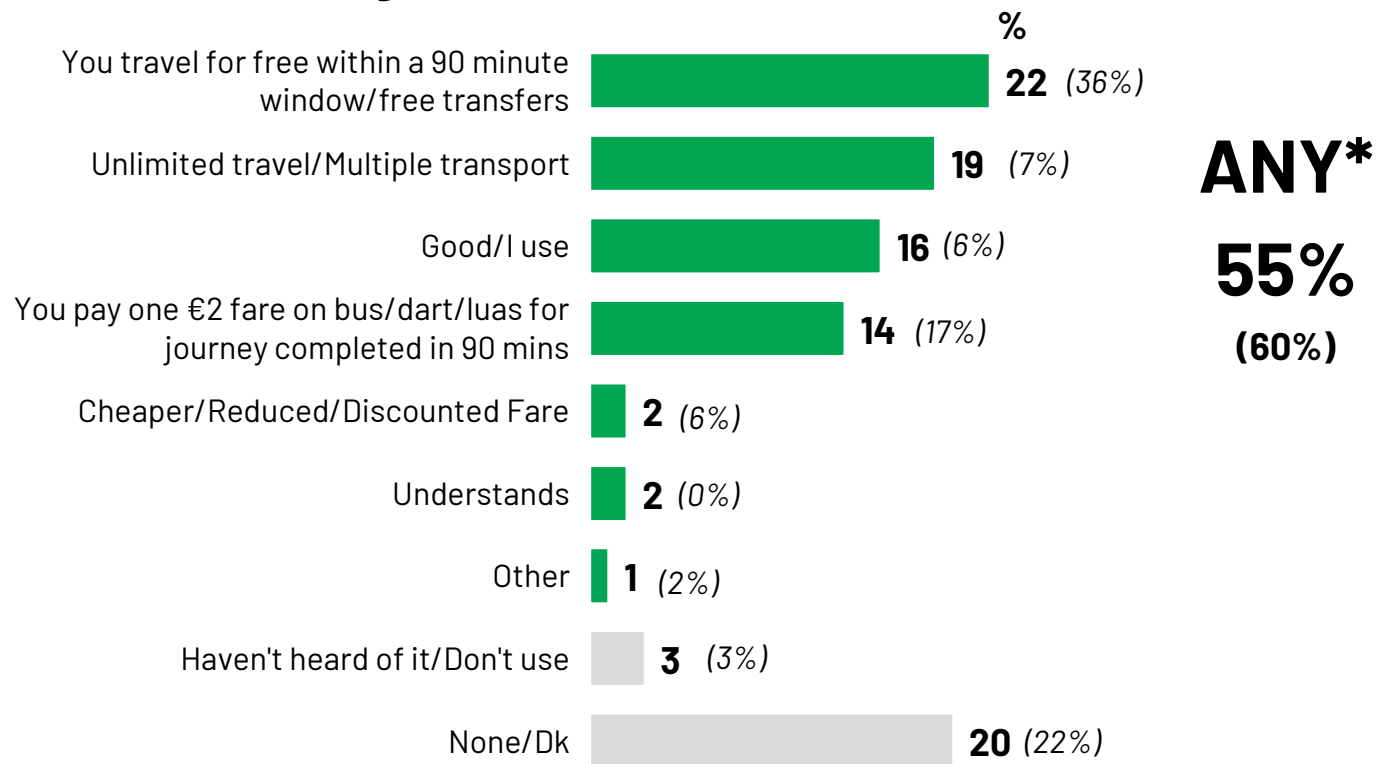
	Ticket Type	
	Cash single / return ticket	TFI Leap Card
<i>Base:</i>	236	2,155
	%	%
Yes	51	82
No	35	14
Don't know	14	4

Q.12 Have you heard of the TFI 90 minute fare on TFI Leap Card?
Base: All public transport users in Dublin N= 2,427

Understanding of TFI 90 minute fare:

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

Understanding of How TFI 90 Minute Fare Works



() = 2023

Note: Question added in 2023



"One payment for 90 mins travel"

"You can get as much public transport as you desire within 90 Minutes"

"Use any public transport for free after you tap once within 90mins"

"Taking one mode of transportation and within 90 of your next bus / train it is free"

"90 mins can use multiple transport"

"When you tap on you can use multiple transport"

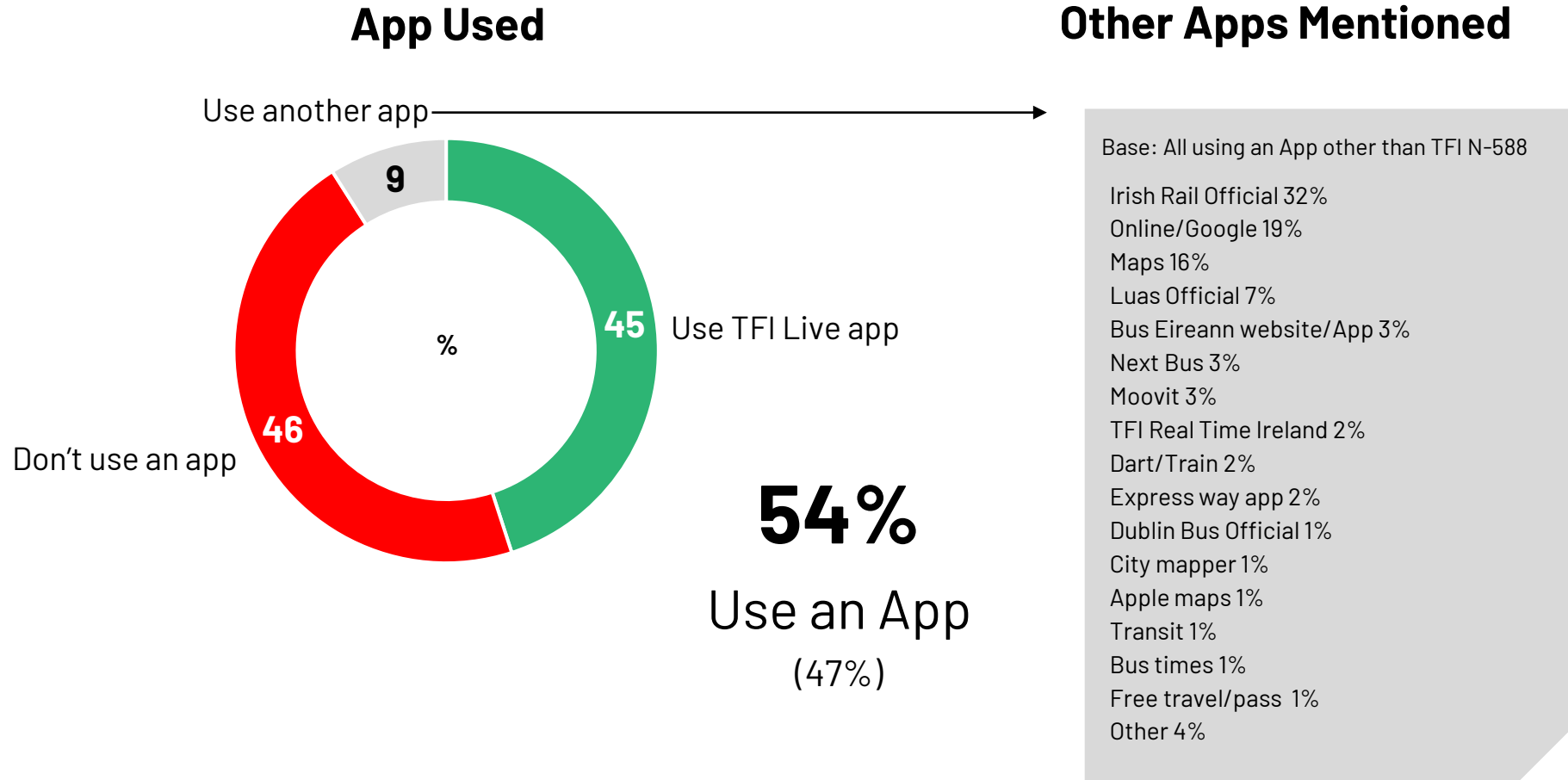
Q.12a What is your understanding of how the TFI 90 minute fare works?

Base: All public transport users in Dublin N= 2,427

*Includes: you travel for free withing 90 minute, unlimited travel and you pay one €2 fare on bus

Use of Apps

45% reported using TFI Live App and 9% another App with Irish Rail Official the most mentioned.



(2023)

Question changed from open to single code in 2024 impacting comparability.

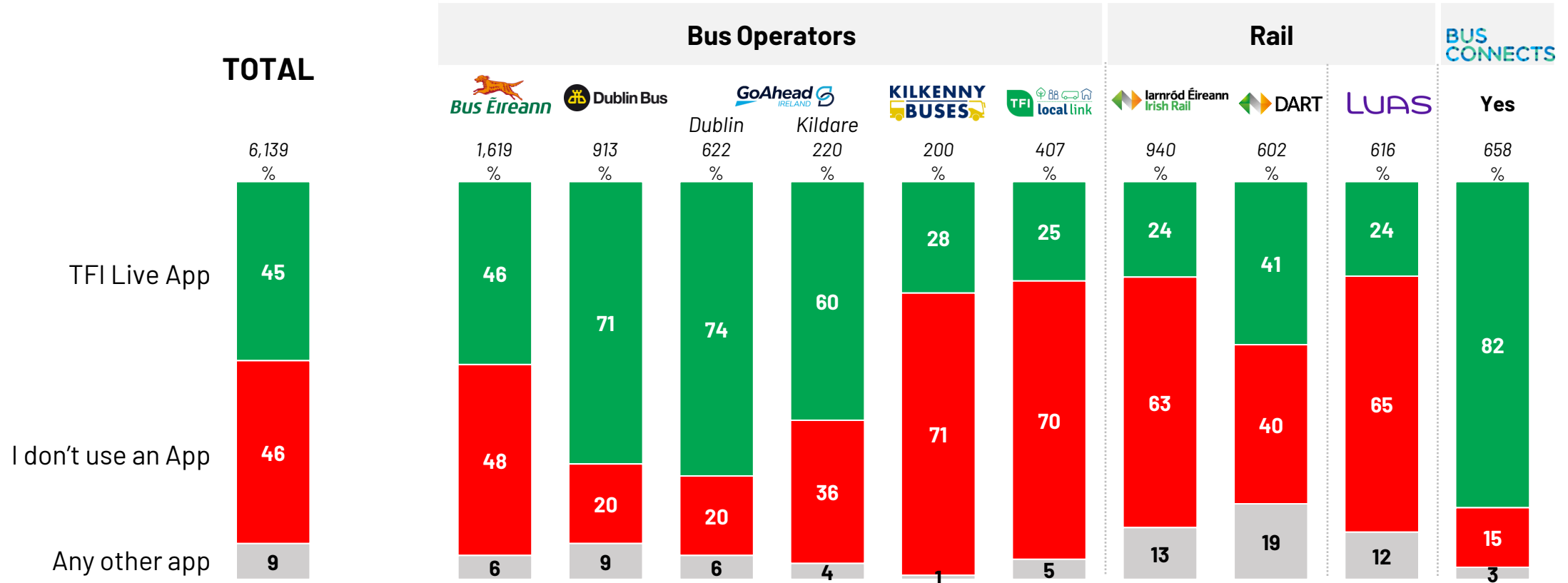
Q.5 Which App, if any, do you use to get real time/live/journey planning [TRANSPORT PROVIDER] information from?

Base: All Public Transport users N= 6,139



Use of Apps: All Operators

Usage of TFI Live App peaks among Dublin Bus and Go-Ahead Dublin users.



Q.5 Which App, if any, do you use to get real time/live/journey planning [TRANSPORT PROVIDER] information from?
 Base: All Public Transport users

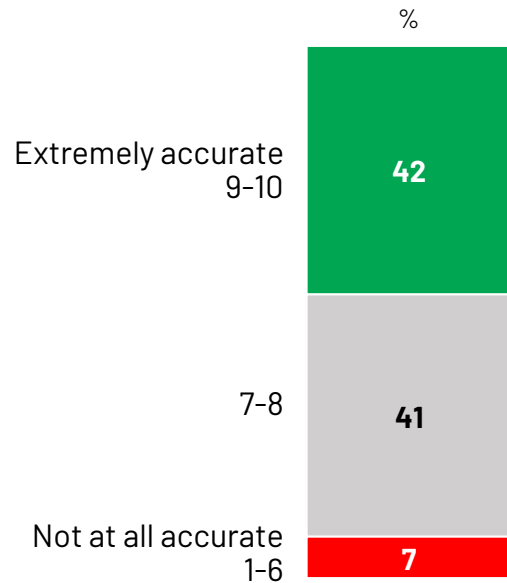
Accuracy of online and Apps vs. Real time at stop:

Of those who expressed an opinion, 42% find online/app info extremely accurate while 46% find real time information at the stop extremely accurate.

Accuracy: online and on App

Base: N - 3,944

All expressed an opinion

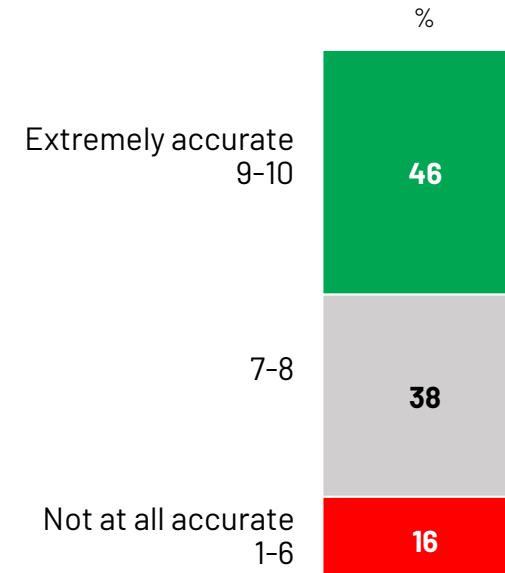


Extremely accurate 2024 (%):	42 (+2)
Extremely accurate 2023 (%):	40
Extremely accurate 2022 (%):	35

Accuracy: Real time at stop

Base: N - 5,184

All expressed an opinion












Extremely accurate 2024 (%):	46 (+2)
Extremely accurate 2023 (%):	44
Extremely accurate 2022 (%):	40

Q5a How accurate or inaccurate do you think the Real Time/Live information online or on your App is? Please use a scale of 1 to 10, where 1 is not at all accurate and 10 is extremely accurate.
 Q.5b How accurate or inaccurate do you think the Real Time/Live Information on the sign at the stop is? Please use a scale of 1 to 10, where 1 is not at all accurate and 10 is extremely accurate.
 Base: All Public Transport users who expressed an opinion on accuracy

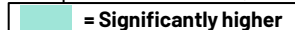


Suggested areas for improvement:

Punctuality and frequency dominate as suggestions especially for Go Ahead Dublin.

	TOTAL	Bus Operators						Rail		
		 Bus Éireann	 Dublin Bus	 Dublin	 Kildare	 KILKENNY BUSES	 TFI local link	 Iarnród Éireann Irish Rail	 DART	 LUAS
Base: All specified areas for improvement - 3,003	3,003	869	430	171	112	155	140	519	306	301
	%	%	%	%	%	%	%	%	%	%
Improve punctuality	18	28	26	29	20	10	6	6	16	5
Improve frequency of buses/luas/train	14	15	12	15	20	5	29	9	15	18
More trains/buses - late night and weekends/peak times	12	7	13	12	13	5	29	13	13	20
More security	8	2	8	2	1	1	1	9	15	32
Improve overcrowding	7	3	4	3	2	8	6	15	8	11
More routes	6	5	8	8	4	34	7	3	2	6
Improve cleanliness	5	5	4	3	-	1	-	7	8	5
More/improved shelters	4	5	2	5	7	16	9	1	0	1
Improve accuracy of Real Time signs	3	4	6	5	6	2	2	1	4	2
Cheaper fares	3	3	2	-	3	-	4	6	1	1
Resume/improve catering service	3	0	-	-	-	1	-	18	1	0
Fewer cancelled buses/trains	3	5	5	8	3	1	1	-	0	0
Friendlier/more helpful staff	2	4	1	1	3	1	-	1	0	-
Improve toilet facilities	2	1	-	1	-	-	-	5	3	-
More electronic and printed timetables	2	2	2	-	3	5	3	1	1	0
Communicate delays/cancelled services with customers	2	2	2	5	1	2	-	2	4	2
Faster service	2	1	3	-	2	1	3	3	1	1
Improve update app	2	2	2	2	2	2	4	2	1	1
Other (All 1% or less)	17	22	11	14	22	20	17	19	19	4

Q.20 Do you have any suggested areas for improvement for [TRANSPORT PROVIDER]? - Specified. Multicode
Base: All specified areas for improvement N= 3,003

 = Significantly higher

Key Take-outs – 2024

Satisfaction with Travel Attributes



Satisfaction with Travel Attributes

Very +fairly satisfied ratings

Across all the operators, about four in five are satisfied with all travel attributes and satisfaction is relatively stable in comparison to last year. Satisfaction is at the highest for comfort (87%) and lowest for crowding (77%).



Comfort

- **87%** are satisfied across all the operators
- **Highest** satisfaction registered for Kilkenny Buses (**99%**) and TFI Local Link (**98%**)
- **Lowest** satisfaction registered for DART (**77%**) and
- Satisfaction has **increased** significantly for Dublin Bus +6ppt to **86%**
- No **significant declines** in satisfaction in comparison to last year



Cleanliness

- **80%** are satisfied across all the operators
- **Highest** satisfaction registered for Kilkenny Buses (**99%**) and Irish Rail (**84%**)
- **Lowest** satisfaction registered for DART (**67%**), Dublin Bus (**77%**), Luas (**77%**)
- Satisfaction has **increased** significantly for Dublin Bus +9ppt to **75%**
- **No significant declines** in satisfaction in comparison to last year



Availability of seat

- **80%** are satisfied across all the operators
- **Highest** satisfaction registered for Kilkenny Buses (**94%**) and TFI Local Link (**94%**)
- **Lowest** satisfaction registered for Luas (**51%**) and DART (**69%**)
- Satisfaction has **increased** significantly for TFI Local Link +9ppt to **94%**
- Satisfaction has **declined significantly** for Bus Éireann -5ppt to **85%** and Luas -12ppt to **51%**



Reliability

- **78%** are satisfied across all the operators
- **Highest** satisfaction registered for TFI Local Link (**94%**) Irish Rail (**94%**) Luas (**90%**) and Kilkenny Buses (**90%**)
- **Lowest** satisfaction registered for Bus Éireann (**62%**) and Go-Ahead Dublin (**72%**)
- Satisfaction has **increased** significantly for Dublin Bus +9ppt to **75%**, Go-Ahead Dublin +9ppt to **72%**, Go-Ahead Kildare +8ppt to **82%**, TFI Local Link +8ppt to **94%**
- Satisfaction has **declined** significantly for Bus Éireann -7ppt to **62%**



Crowding

- **77%** are satisfied across all the operators
- **Highest** satisfaction registered for Go-Ahead Kildare (**92%**) and TFI Local Link (**92%**)
- **Lowest** satisfaction registered for Luas (**51%**) and DART (**69%**)
- Satisfaction has **increased** significantly for TFI Local Link +10ppt to **92%**
- Satisfaction has **declined** significantly for Luas -12ppt to **51%**, Kilkenny Buses -12ppt to **86%** and Bus Éireann -5ppt to **81%**

Key Take-outs – 2024

Value for Money, Safety, Apps, TFI 90 min fare, & Usage Norms



Value for Money

Strong satisfaction for value for money with **nine in ten** users very or fairly **satisfied** which is a further increase in comparison to last year (+3ppt). This positive perception is consistent across operators peaking at **96%** among Luas users and to **94%** among Dublin Bus and DART users.

Satisfaction with value for money has increased significantly for several operators (Bus Éireann, Dublin Bus, Irish Rail commuters, DART and Luas). Kilkenny Buses is the exception where the VFM rating remains high (87%) but declined in comparison to last year (-7ppt).

TFI Leap Card holders are also very positive about value for money with 92% of them satisfied, which is a significant increase in comparison to last year (+4ppt).



TFI 90min fare (Dublin only)

Awareness of TFI 90 min fare is high with almost **8 in 10** aware which is a further increase since last year (+3ppt). Awareness peaks among those **under 25 years** to **82%**. More than half of public transport users in Dublin have an accurate understanding how the 90-minute fare works.



Transport Apps and Real time information

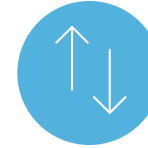
45% of public transport users use **TFI Live App** and **9%** use **another app**. Usage of TFI Live App peaks among Dublin Bus and Go-Ahead Dublin users (respectively 71% and 74%). Real time information at the stop is rated as more accurate in comparison to online info and app (46% real time vs 42% online and app).



Usage Norms

Top uses for public transport are:

Work **48%**, Leisure/sport **39%** and shopping **33%**



Safety

Feeling safe is high, with almost all users, similar to 2023 feeling very or fairly safe across modes. (94%)

Safety walking to and from the stop: Across transport modes the great majority (94%) feel very or fairly safe. Feeling very safe is lowest for Go-Ahead Dublin (52%) and Luas (58%)

Safety at the stop: Overall 94% feel very or fairly safe across modes. Feeling very safe is lower for Go-Ahead Dublin (46%) and Luas (52%)

Safety on board: Across transport modes 94% feel very or fairly safe. Feeling very safe is lower for Go-Ahead Dublin (52%) and Luas (49%)

Key Take-outs – 2024

Suggestions for improvements



Suggestions for improvement

Improve punctuality (18%), frequency (14%) and number of vehicles outside peak hours (12%) are the top three areas suggested for improvement. Top suggestions for improvement by Operator are :

- **Bus Éireann:** improve punctuality (**28%**)
- **Dublin Bus:** improve punctuality (**26%**)
- **Go-Ahead Dublin:** Improve punctuality (**29%**)
- **Go-Ahead Kildare:** Improve punctuality (**20%**) and improve frequency (**20%**)
- **TFI Local Link:** improve frequency (**29%**) and more vehicles outside peak hours (**29%**)
- **Irish Rail:** Fewer cancelled trains (**18%**)
- **DART:** Improve punctuality (**16%**)
- **Luas:** Improve security (**32%**)

