Horizons Regional Council

SIL Research

| Public Transport Passenger Survey

July 2025

SIL RESEARCH
Strategy | Insights | Leverage

horizons
REGIONAL COUNCIL

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In this report:

CORE INSIGHT

"Most bus travel is essential, driven by passengers without transport alternatives. Work, shopping, and education are the key trip purposes. Satisfaction is high, but communication on delays and service frequency need improvement. Priorities include timetable reliability, coverage, and infrastructure, with targeted approaches by age group, SuperGold status, and travel frequency."

EXECUTIVE SUMMARY

This research measured bus user satisfaction across the Manawatū-Whanganui region. It explored travel purposes, satisfaction with trips and services, likelihood to recommend, and suggested improvements. Fieldwork ran from 17 June to 18 July 2025, using intercept surveys. A total of 948 responses were analysed.

The key findings were as follows:

- **REASON FOR TRAVEL**: Most bus travel is essential (69%), driven by passengers without driving ability or private transport. Convenience (32%) and value for money (31%) also rate highly. Younger riders often lack driving options, while older and SuperGold users emphasise convenience and cost. Frequent users prioritise practicality, with infrequent riders citing preference or parking issues. These trends highlight the need to maintain reliable, accessible services while tailoring messaging by age, cardholder status, and frequency to leverage positive perceptions and encourage broader, preference-based use.
- **TRAVEL DESTINATION**: Work and shopping are the top bus trip purposes (37% each), followed by education (35%) and social travel (28%). Patterns vary by area and demographics: younger riders focus on education, working-age groups on employment, and older passengers on shopping, medical, and social trips. Morning travel is dominated by work and education, while midday favours shopping and medical needs. SuperGold cardholders lean towards non-work trips, and frequent users are mainly work or education travellers, with infrequent users more often travelling for shopping or social reasons.
- **OVERALL SATISFACTION** Overall satisfaction is strong at 8.2, with trip ratings higher at 8.8. Whanganui (9.1) and Feilding (9.0) lead in trip satisfaction, while Regional services score lower. Midday travellers, older passengers, and SuperGold cardholders report the highest satisfaction for both trips and the system, with younger riders rating lowest.
- **CURRENT BUS TRIP OVERVIEW:** Passenger satisfaction is high across all service features, with most ratings above 8.5 and over 90% satisfaction. Top strengths include ease of boarding, security, and seat availability, while service frequency and timetable reliability score slightly lower. Whanganui performs best in several areas, Regional services lower. Midday trips, older passengers, females, SuperGold cardholders, and frequent users report higher satisfaction, while younger and infrequent users give lower ratings.
- **PUBLIC TRANSPORT SYSTEM OVERVIEW:** When boarding or alighting, passengers prioritise clear route/timetable information (48%), real-time tracking displays (42%), and weather protection (42%). Accessibility at bus stops (40%) is also pivotal, with older passengers placing the greatest emphasis on accessibility and seating.
- **GETTING ON AND OFF THE BUS:** Public transport system satisfaction remains high, particularly for payment convenience (91%, 8.5) and travel time (92%, 8.3). Information access is strong (87%, 8.0), though communication on disruptions is lower (74%, 7.0). Older passengers, females, SuperGold cardholders, and midday travellers rate services higher, while younger, gender diverse, and infrequent users give lower scores.

- **NPS:** Net Promoter Score is +47% (61% promoters; 14% detractors; 25% passives). NPS is highest in Feilding (+52%) and Whanganui (+50%), and lowest on Regional services (+45%). Advocacy is strongest among passengers aged 65+ and SuperGold cardholders.
- **PRIORITY ANALYSIS** shows that service delay information has the greatest impact on overall satisfaction but performs poorest, making it the top area for improvement. Other key areas needing attention include travel time, service frequency, timetable information, value for money, and driver helpfulness. Features like ease of boarding, seating, temperature comfort, and safety rate highly but should be maintained. Lower-impact areas such as payment convenience and punctuality still offer room for enhancement. Addressing communication gaps and moderate operational issues will most improve overall satisfaction.
- **SUGGESTED IMPROVEMENTS:** Top priorities for improvement are timetable/scheduling (26%) and service frequency/reliability (25%), followed by infrastructure (17%), comfort/accessibility (15%), and route expansion (14%). Fare/payment options (11%) and communication/driver conduct (10% each) also matter. Younger passengers focus on reliability, older on comfort and coverage; frequent users emphasise operational consistency, occasional users facilities and fares.

CONCLUSION: Public transport in the region is used mainly for essential travel, with convenience and value for money key motivators alongside limited private transport access. Travel purposes vary widely by age, location, and time of day, with work, shopping, and education dominating. Overall satisfaction remains high, with trips generally rated higher than the system, especially among midday travellers, older passengers, and SuperGold cardholders. Core service features such as boarding ease, security, and seating are rated very strongly, while service frequency, timetable reliability, and communication on delays lag behind. Payment convenience, travel time, and information access are also well-regarded. Priority analysis highlights that improving delay communication, operational reliability, and timetable information would yield the greatest satisfaction gains, alongside enhancements to value for money and driver helpfulness. Passenger improvement priorities centre on scheduling, frequency, and infrastructure, with demographic differences in preferences indicating opportunities for targeted messaging and service adjustments. Maintaining current strengths while addressing operational and communication gaps will be key to sustaining and growing ridership.

METHODOLOGY
BACKGROUND AND OBJECTIVES

To monitor effective and efficient public transport services in the region, Horizons Regional Council commissioned SIL Research to conduct a passenger survey. The purpose of this research was to measure customer satisfaction of passengers using the network of bus transport services in the Manawatū-Whanganui region.

Horizons Regional Council provides public transport services in the Manawatū-Whanganui Region – supporting public bus links within urban areas and between satellite towns.

NZ Transport Agency Waka Kotahi requires that surveys measuring user perceptions of public transport are carried out regularly as part of monitoring requirements for public transport performance. To allow for nationwide comparison, NZ Transport Agency developed a list of common questions, sampling methods and ratings scales to be used by regional councils.

SIL Research, together with the Horizons Regional Council (HRC), developed a Bus Passenger Survey questionnaire in 2022 in line with NZ Transport Agency guidelines (including the minimum set of questions to ensure a core customer satisfaction dataset that is nationally consistent). These were updated again in 2025.

Most questions required only a rating to be provided on an 11-point Likert scale between 0 ('*extremely dissatisfied*') and 10 ('*extremely satisfied*'). A '*not applicable*' option was also included.

SAMPLING DESIGN

HRC operates approximately 41* bus routes within the region. These bus routes were aggregated into four main segments based on coverage area – Palmerston North Urban, Whanganui, Feilding and other regional services.

Total annual trip statistics for April-June 2025 were used to determine proportions. Achieved sample and proportions are presented below (see Table 1).

Table 1 Summary of bus services in the region

Area coverage	Routes approx.	Trips 2024-25	Sample proportion	Surveys collected
Palmerston North Urban	12	1,097,824	69%	655
Whanganui	14	191,305	10%	95
Feilding	2	96,626	10%	101
Regional	5	16,594	1%	9
Unspecified *(10% of respondents didn't state their route)*				88

Source: Horizons Regional Council 2025.

A stratified random sampling approach was used within segments, with pragmatic exclusions for irregular/low-patronage services was then used to select the trips to be surveyed. Within each segment, bus routes were randomly selected between different times and days for onboard intercept surveys.

*Most bus routes/services were included in the random selection. A small number of irregular services (e.g. limited times, only certain days of the week/month, etc.), or routes with limited patronage, were excluded from active random selection.

Note: Regional services had a very small sample size (n=9, 1% of the total). Results are included for completeness but should be interpreted with caution due to limited reliability.

DATA COLLECTION

Fieldwork was conducted between 17 June to 18 July 2025. A team of Palmerston North based SIL Research interviewers travelled the bus network throughout the data collection period for the purpose of completing user intercept surveys on their given route.

To minimise any possible non-response bias or sample imbalance towards passengers on longer trips, every selected passenger was presented with five options to complete the survey:

(1) user intercept face-to-face interview conducted on bus at time-of-service.

(2) user intercept paper-based survey. The selected passengers were offered the opportunity to fill out the paper-based survey on the bus during their travel and return to interviewer prior to disembarking at their destination.

(3) user intercept freepost return survey. Any selected passengers offered the paper-based survey, but unable to complete and return to the interviewer prior to disembarking, were able to complete and return the survey to SIL via FREEPOST after their trip.

(4) User intercept online survey. The selected passengers offered to complete the paper-based survey were able to complete this survey online using a link or QR code printed on the survey form.

(5) An online survey was promoted using social media, and a qualifying question was added to allow only those who had used the bus service in the past 30 days.

In addition, A3 posters were displayed on all buses towards the end of the collection period. These posters were also included on the irregular regional buses, and generally served the purpose of increasing survey awareness and/or reminding passengers to return their survey forms. Thirteen surveys were attributed to poster-driven completions and are included within the online-link (method 4) total.

A total of n=948 surveys were used in the final analysis. Sample counts and proportions based on the collection method can be found in the table below.

Table 2 Number of responses based on the data collection method

Method	Number of responses	Percent
Face-to-face interviews + paper-based surveys received before disembarking (methods 1 and 2)	715	75%
Freepost returned surveys (method 3)	32	3%
Completed online via survey link (method 4)	44	5%
Social media (method 5)	157	17%

DATA ANALYSIS

The main sample groups analysed in this report were: service area, passenger age and gender. During the analysis stage of this report, two sets of statistical testing were employed while reviewing data findings. Chi-

square tests were used when comparing group results in tables, and ANOVA tests were used when comparing averages across groups. The threshold for reporting any statistically significant differences was a p-value of 0.05. Where differences were outside this threshold (less than 95%), no comments were made; where differences were within this threshold, comments have been made within the context of their practical relevance to the Council.

Open-ended (free-text) responses were also collected and analysed. SIL Research used a content analysis approach to determine certain themes, concepts or issues within this feedback. This represents a '*bottom up*' data driven approach where identified themes are derived purely from the collective respondent feedback, rather than fitting responses into pre-determined categories.

To show the accuracy of the survey results, 95% confidence intervals were calculated around each average score. This means that, if the survey were repeated many times, the true average in the wider population would fall within this range 95 times out of 100. The width of the interval depends on how much responses varied and the number of people who answered each question.

Note: The subgroup of 'infrequent users' is very small (n=11). Findings should be treated as indicative only.

NOTES ON REPORTING

Due to rounding, figures with percentages may not add to 100%. Reported percentages were calculated on actual results not rounded values.

Results for reported themes (based on open-ended comments) and multi-choice questions may not add to 100% as several themes/responses could be mentioned by a given respondent.

Overall '*satisfaction*' percentages presented in this report are aggregated 6-10 responses on a 0-10 scale. Satisfaction percentages will differ from mean scores (average ratings).

Satisfaction percentages represent positive ratings only, whereas mean scores provide an average of all ratings across the whole scale.

SAMPLE INFORMATION

Table 3 Area coverage

Area	Number of responses	Percent
Palmerston North Urban	655	69%
Whanganui	95	10%
Feilding	101	11%
Regional*	9	1%
Unspecified**	88	9%

*Caution: Very small base size (n=9). Results should be interpreted with care. Regional fares are generally higher than urban fares due to travel zones and distance, which may also influence satisfaction scores.

**A number of passengers did not specify their route ('unspecified'). Results including this group should be interpreted with awareness that totals may be affected.

Table 4 Time of trip

Area	Number of responses	Percent
Morning (6am – 11am)	275	29%
Midday (11am – 2pm)	214	23%
Afternoon (from 2pm)	268	28%
Not stated	191	20%

Table 5 Day of the trip

Area	Number of responses	Percent
Weekday	408	43%
Weekend	397	42%
Not stated	143	15%

Table 6 GoldCard holder respondents

Area	Number of responses	Percent
Yes*	171	18%
No	777	82%

*A number of respondents might have confused being a GoldCard holder or having a free bus travel for different reasons.

Table 7 Gender of respondents

Area	Number of responses	Percent
Male	367	39%
Female	543	57%
Other	3	0%
Gender diverse*	14	1%
Prefer not to say*	21	2%

*Small subgroup sizes for 'gender diverse' (n=14) and 'prefer not to say' (n=21). Results should be interpreted with caution.

Table 8 Age of respondents

Area	Number of responses	Percent
15-17	126	13%
18-24	183	19%
25-34	167	18%
35-44	127	13%
45-59	140	15%
60-64	48	5%
65+	138	15%
Preferred not to say	19	2%

While all gender groups are reported, the small subgroup sizes for 'gender diverse' (n=14) and 'prefer not to say' (n=21) limit statistical reliability and should be interpreted cautiously.

REASON FOR TRAVEL

All respondents were asked: "*Overall, what is your main reason(s) for using public transport?*"

Main reasons for bus travel (multi-choice, prompted)

Reason	%
Do not drive	47%
Do not own private transport	36%
Convenience	32%
Value for money	31%
Personal preference	18%
Environmental concerns	18%
Parking concerns	14%
Other	8%
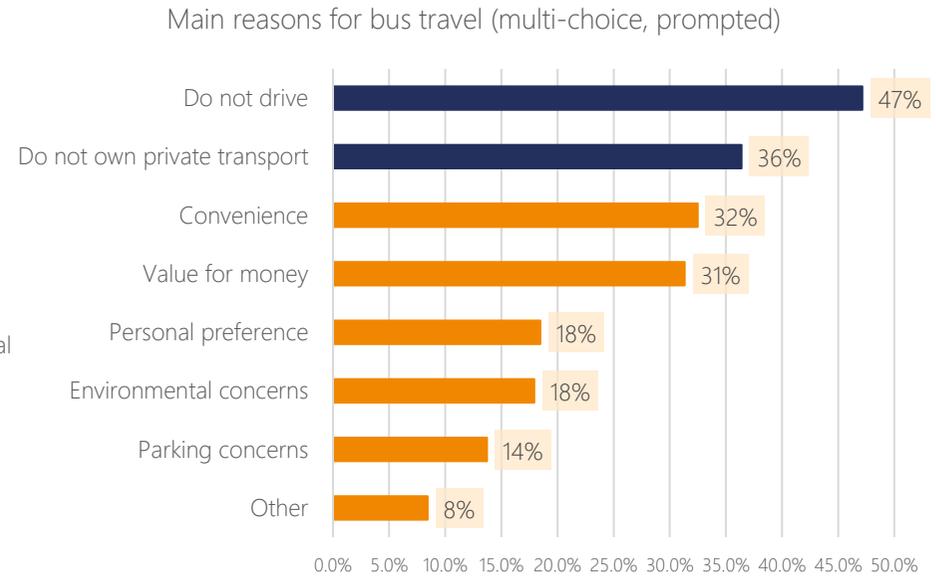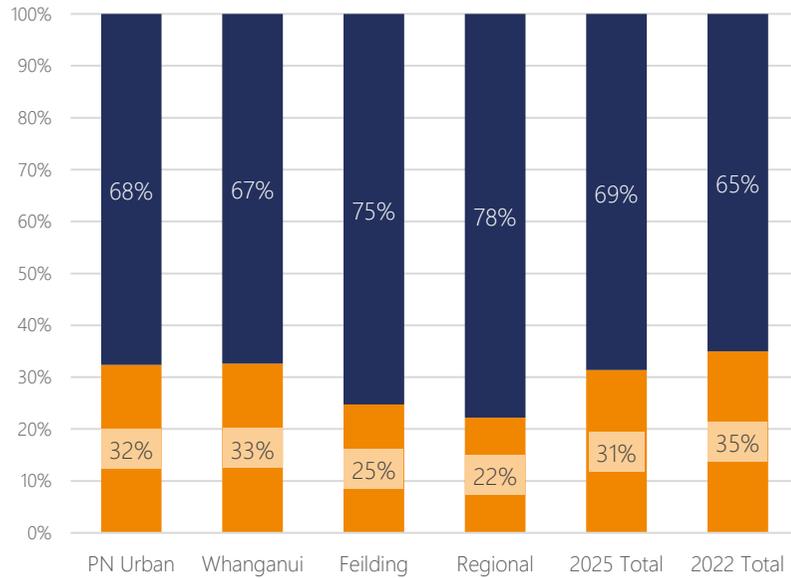
- Most bus use in the region is for essential travel (69%), led by Regional passengers at 78%, with Feilding at 75% and Palmerston North Urban and Whanganui just under 70%. Compared with 2022, essential use is slightly higher, with a drop in preference-based travel.
- The main reasons for bus use are practical. Forty-seven percent do not drive and 36% lack private transport. Convenience (32%) and value for money (31%) also rate highly, while personal preference and environmental concerns (both 18%) show a smaller but committed group of choice riders.
- For Horizons, this highlights the importance of maintaining reliable, accessible services for those without alternatives, while also making the most of positive perceptions of convenience, affordability, and sustainability to grow ridership.

- Younger passengers show distinct patterns, with 15–17 year olds far more likely not to drive (68%) and 18–24 year olds most often lacking private transport (53%). Those aged 65+ are more likely to cite convenience (47%) and value for money (40%).
- Females are more likely than males to report not driving (53% vs 39%), while males mention personal preference slightly more often. SuperGold cardholders stand out for citing convenience (52%) and value for money (55%), while non-cardholders more often say they do not drive or own transport.
- Frequent users are more likely to mention convenience (42%) and value for money (37%), while infrequent users* lean towards personal preference and parking concerns. These patterns point to opportunities for Horizons to target messages by age, cardholder status, and usage frequency.

n=948

*Small base size (n=11). Interpret with caution.

TRAVEL DESTINATION

All respondents were asked: *"What was your main destination/place(s) you travelled to on this bus trip?"*

Prompted main destinations (multi-choice)

Destination	Percentage
Work	37%
Shopping	37%
Education	35%
Social	28%
Medical	15%
Other	9%
Sports and Recreation	8%

Main destinations by area of service

Legend: Work, Shopping, Education, Social, Medical, Other, Sports and Recreation

PN Urban: 40%, 34%, 39%, 28%
Whanganui: 30%, 51%, 16%, 31%, 31%
Feilding: 31%, 33%, 22%, 29%
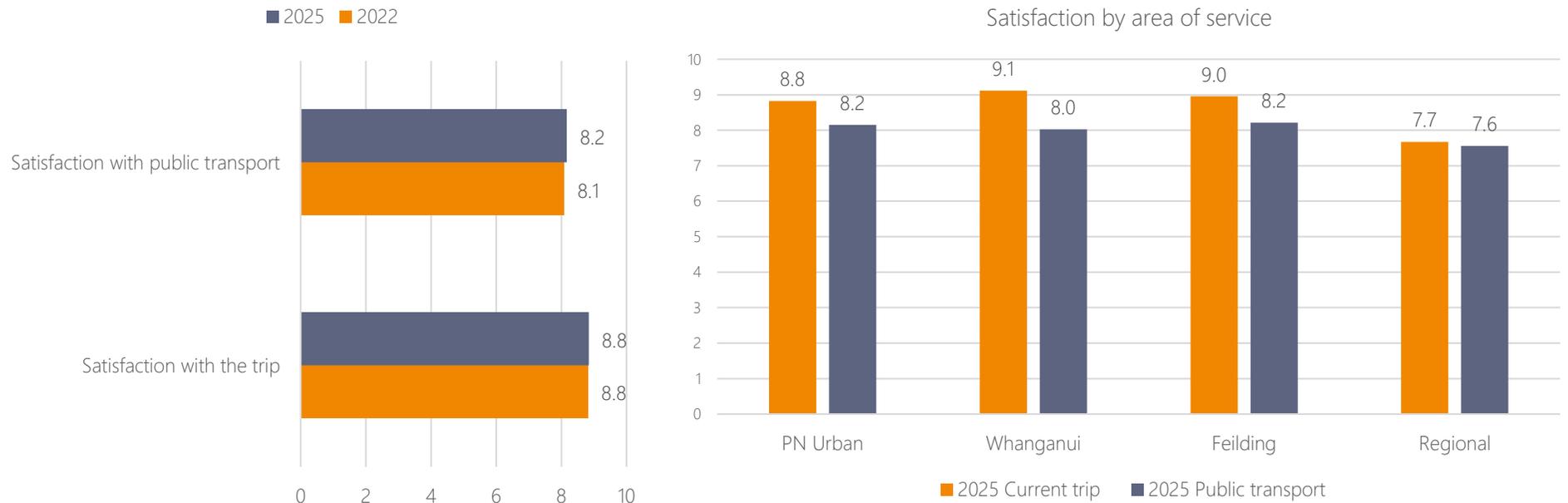Regional: 44%, 11%, 33%, 22%, 22%
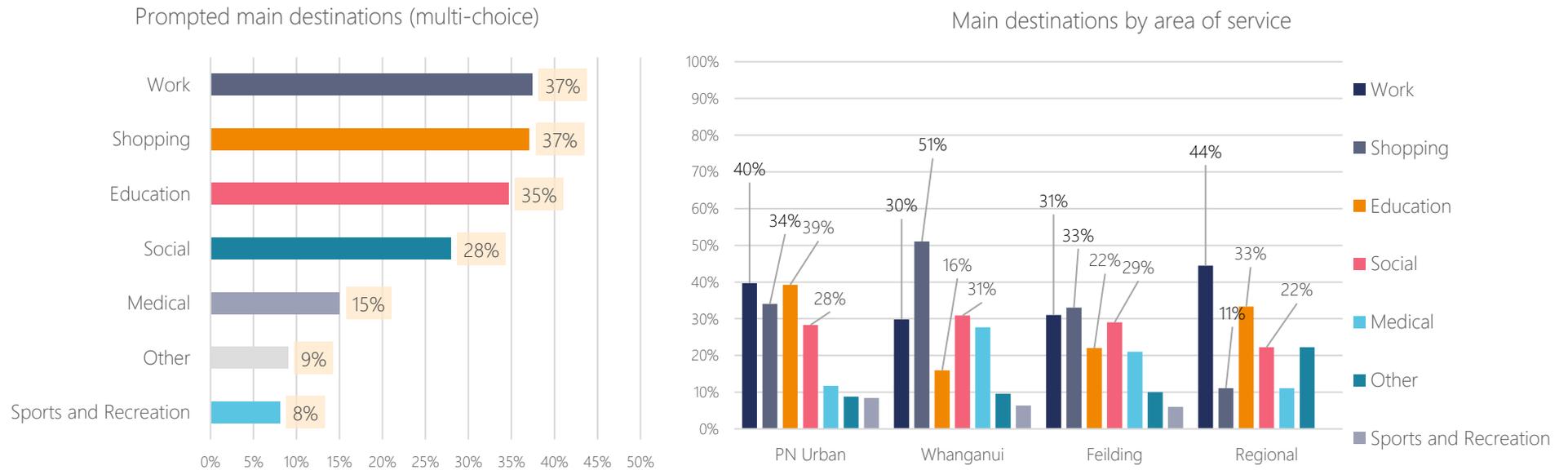
- Work and shopping are the joint top destinations for bus users at 37% each, closely followed by education at 35%. Social trips (28%) and medical visits (15%) make up smaller but still important segments, while sports, recreation, and other trips are less common.
- Destination patterns vary by area. In Palmerston North Urban, work (40%), shopping (39%), and education (34%) dominate. Whanganui shows a strong leaning towards shopping (51%), with work (30%) and social trips (31%) also key. Feilding trips are more evenly spread, with work (31%), shopping (33%), and social (29%) prominent.
- Regional services have the highest work-related travel (44%), followed by social trips (33%) and education (22%).

- Travel purpose varies strongly by demographic. Education dominates for 15–24 year olds (over 60%), while work is most common for 25–64 year olds (around 50%). Those aged 65+ focus on shopping (61%), medical trips (38%), and social travel (41%).
- Morning trips are mainly for work (45%) or education (32%), while midday travel skews to shopping (40%) and medical (17%). SuperGold cardholders are more likely to travel for shopping, medical, and social purposes, while non-cardholders more often travel for work and education.
- Frequent users tend to be work or education travellers, while infrequent users* are more likely to be shopping or social passengers.

n=941

Small base size (n=11). Interpret with caution.

OVERALL SATISFACTION

All respondents were asked about their satisfaction with the trip and public transport system overall. Responses were collected on a scale from 0 ('*extremely dissatisfied*') to 10 ('*extremely satisfied*'). '*Not applicable*' excluded from average scores.

2025 **2022**

Satisfaction with public transport: 8.2 (2025), 8.1 (2022)

Satisfaction with the trip: 8.8 (2025), 8.8 (2022)

(scale 0, 2, 4, 6, 8, 10)

Satisfaction by area of service

Area	2025 Current trip	2025 Public transport
PN Urban	8.8	8.2
Whanganui	9.1	8.0
Feilding	9.0	8.2
Regional	7.7	7.6

2025 Current trip **2025 Public transport**

- Overall satisfaction remains high, with the average rating for public transport at 8.2, a small rise from 8.1 in 2022. Trip satisfaction is unchanged at 8.8.
- By area, satisfaction with the current trip in 2025 is highest in Whanganui (9.1), followed by Feilding (9.0) and Palmerston North Urban (8.8), with Regional services lower at 7.7*. Ratings for the public transport system overall are consistently lower than for the trip itself, ranging from 8.2 in Palmerston North Urban and Feilding to 8.0 in Whanganui, and 7.6 for Regional services*.
- These results indicate consistently positive passenger experiences, with trip satisfaction often exceeding views of the system overall.

- Midday travellers recorded the highest satisfaction with their trip (9.12) and the public transport system overall (8.32), while morning travellers scored lower, particularly for the system (7.93).
- Passengers aged 65+ rated both their trip (9.25) and the system (8.53) more highly than other age groups, with 15–17 year olds giving the lowest scores (8.38 and 7.89).
- SuperGold cardholders rated satisfaction higher than non-cardholders for both their trip (9.21 vs 8.76) and the system (8.57 vs 8.08).
- Females recorded higher system satisfaction (8.25) than males (8.15) and gender diverse** passengers (7.36).
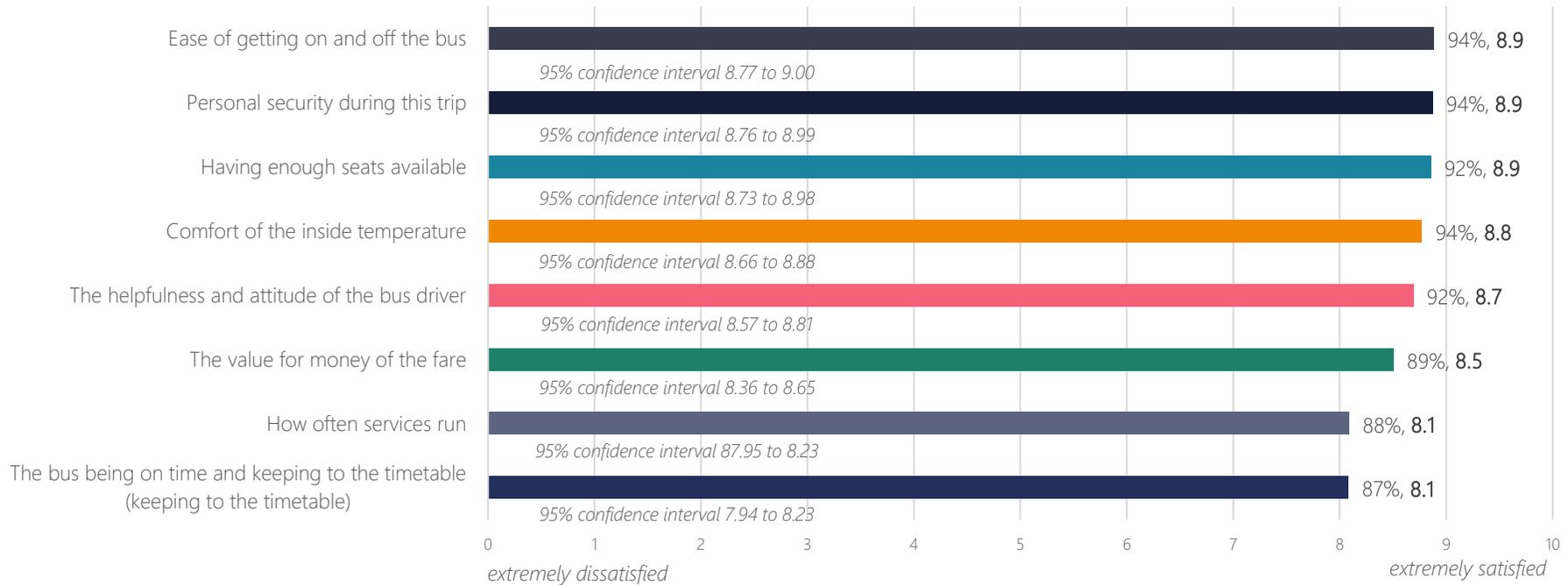
*Small base size (n=9). Interpret with caution.

n=851-941

**Small base size (n=14). Interpret with caution.

CURRENT BUS TRIP OVERVIEW

All respondents were asked to rate their experience of 8 service features for their current bus trip. Responses were collected on a scale from 0 ('*extremely dissatisfied*') to 10 ('*extremely satisfied*'). '*Not applicable*' excluded from average scores.

Service feature	Satisfaction / Score	95% confidence interval
Ease of getting on and off the bus	94%, 8.9	95% confidence interval 8.77 to 9.00
Personal security during this trip	94%, 8.9	95% confidence interval 8.76 to 8.99
Having enough seats available	92%, 8.9	95% confidence interval 8.73 to 8.98
Comfort of the inside temperature	94%, 8.8	95% confidence interval 8.66 to 8.88
The helpfulness and attitude of the bus driver	92%, 8.7	95% confidence interval 8.57 to 8.81
The value for money of the fare	89%, 8.5	95% confidence interval 8.36 to 8.65
How often services run	88%, 8.1	95% confidence interval 87.95 to 8.23
The bus being on time and keeping to the timetable (keeping to the timetable)	87%, 8.1	95% confidence interval 7.94 to 8.23

Scale: 0 (extremely dissatisfied) to 10 (extremely satisfied)

- Passenger satisfaction remains very strong across all core service features, with most measures rated above 8.5 out of 10 and satisfaction levels exceeding 90 percent. Top-performing areas include ease of getting on and off the bus, personal security, and seat availability, each scoring 8.9 with satisfaction rates above 92 percent. Comfort of the inside temperature and driver helpfulness also rated highly. While still positive, the lowest scores were for service frequency and timetable reliability (both 8.1), indicating possible opportunities for improvement.
- Overall, the results reflect a consistently positive passenger experience, with safety, comfort, and staff interactions standing out as key strengths for the service provider.

- Satisfaction varies meaningfully across trip segments, age groups, gender, SuperGold status, and usage frequency. Whanganui scores highest for seat availability, driver helpfulness, and personal security, while Regional services rate lower across most measures*. Midday trips achieve notably better results for seat availability and service frequency. Older passengers, particularly 65+, give the highest ratings for value for money, timetable reliability, and personal security, while 15–17-year-olds report the lowest across most aspects. Females tend to rate comfort, driver helpfulness, and security higher than males. SuperGold cardholders show significantly stronger satisfaction across almost all measures. Frequent users rate reliability and frequency more positively, while infrequent users** score lower on comfort and security.
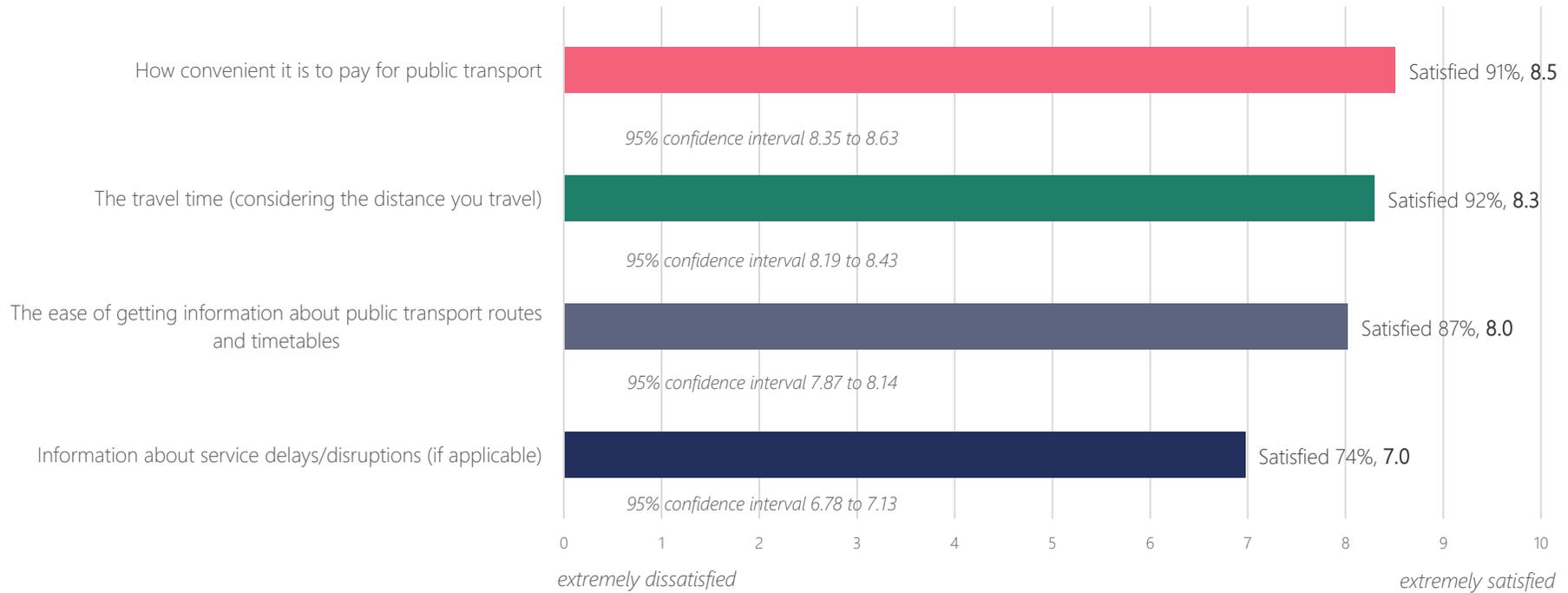
n=779-944

*Small base size (n=9). Interpret with caution.
**Small base size (n=11). Interpret with caution.

PUBLIC TRANSPORT SYSTEM OVERVIEW

All respondents were asked to rate their experience of public transport in this region over the last three months. Responses were collected on a scale from 0 (*'extremely dissatisfied'*) to 10 (*'extremely satisfied'*). *'Not applicable'* excluded from average scores.

How convenient it is to pay for public transport — Satisfied 91%, **8.5**
95% confidence interval 8.35 to 8.63

The travel time (considering the distance you travel) — Satisfied 92%, **8.3**
95% confidence interval 8.19 to 8.43

The ease of getting information about public transport routes and timetables — Satisfied 87%, **8.0**
95% confidence interval 7.87 to 8.14

Information about service delays/disruptions (if applicable) — Satisfied 74%, **7.0**
95% confidence interval 6.78 to 7.13

Scale: 0 *extremely dissatisfied* to 10 *extremely satisfied*

- Satisfaction with the public transport system remains high overall, with strong results for payment convenience (91%, 8.5) and travel time relative to distance (92%, 8.3). Access to information about routes and timetables is also rated positively (87%, 8.0), showing that most passengers find it easy to plan their journeys. The main area for improvement is communication about service delays or disruptions, which, while still reasonable, scores notably lower (74%, 7.0). These results suggest that maintaining current service levels in payment ease, travel efficiency, and trip planning support should remain priorities, with targeted efforts to strengthen disruption communications to further enhance the passenger experience.

- Feilding residents rate payment convenience highest (9.04), while Regional services score lowest (6.63)*. Midday travellers find it easier to get public transport information (8.36) compared with morning users (7.83). By age, those 65+ report the highest travel time satisfaction (8.83) and payment convenience (9.16), whereas 15–17-year-olds rate these lowest (7.75 and 7.56 respectively). Gender differences show females score higher for information access (8.07) and travel time (8.35) than gender diverse** respondents (7.14 and 6.79). SuperGold cardholders rate travel time (8.83) and payment convenience (8.93) higher than non-holders. Frequency of use also matters, with 2–3 times/week users rating payment convenience highest (8.87) and rare users lowest (7.77).
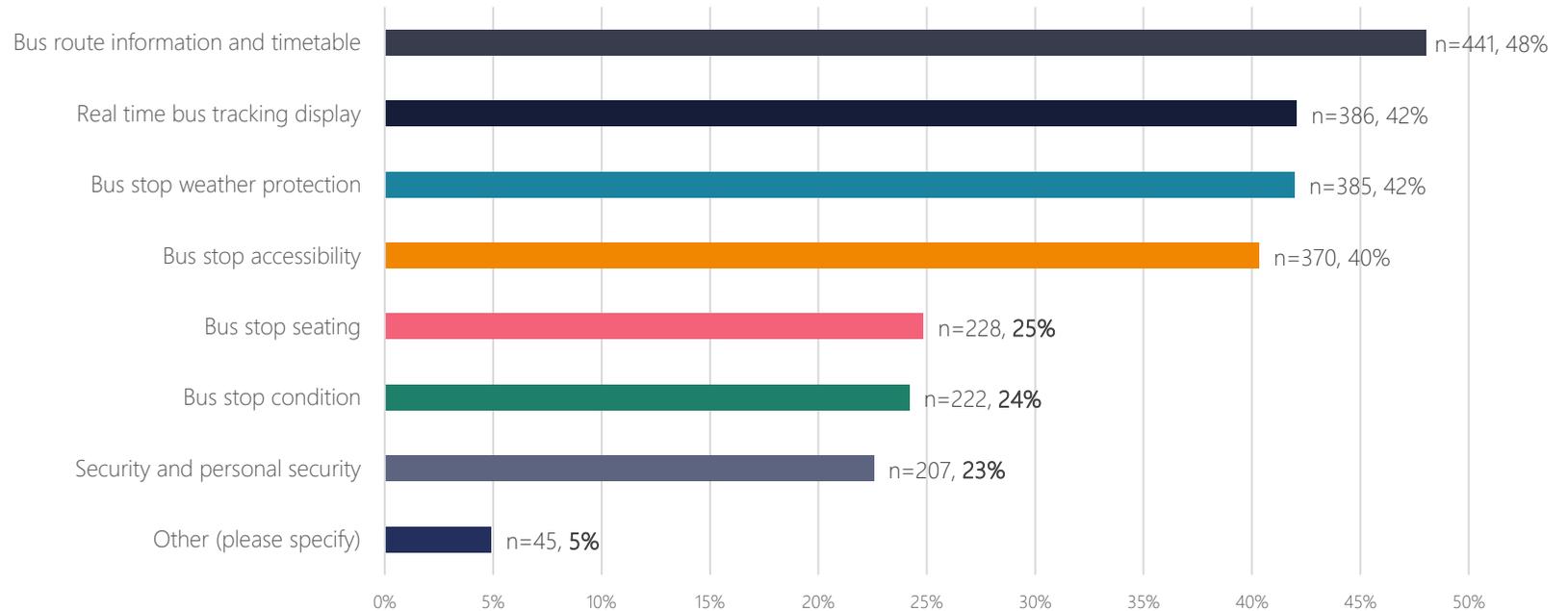
n=727-923

*Small base size (n=9). Interpret with caution.
** Small base size (n-14). Interpret with caution.

GETTING ON AND OFF THE BUS

All respondents were asked to identify the most important factors affecting their overall satisfaction when boarding or alighting from a bus stop. Seven predetermined options and an Other (please specify) category were provided, and respondents could select multiple responses.

Bus route information and timetable — n=441, 48%
Real time bus tracking display — n=386, 42%
Bus stop weather protection — n=385, 42%
Bus stop accessibility — n=370, 40%
Bus stop seating — n=228, 25%
Bus stop condition — n=222, 24%
Security and personal security — n=207, 23%
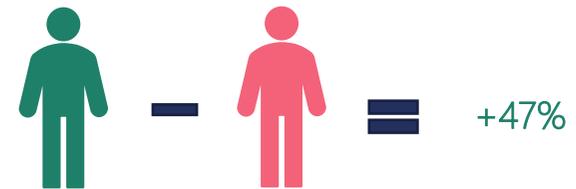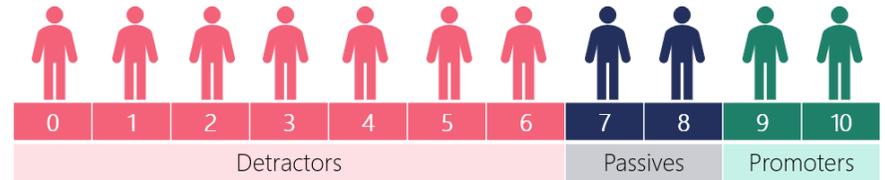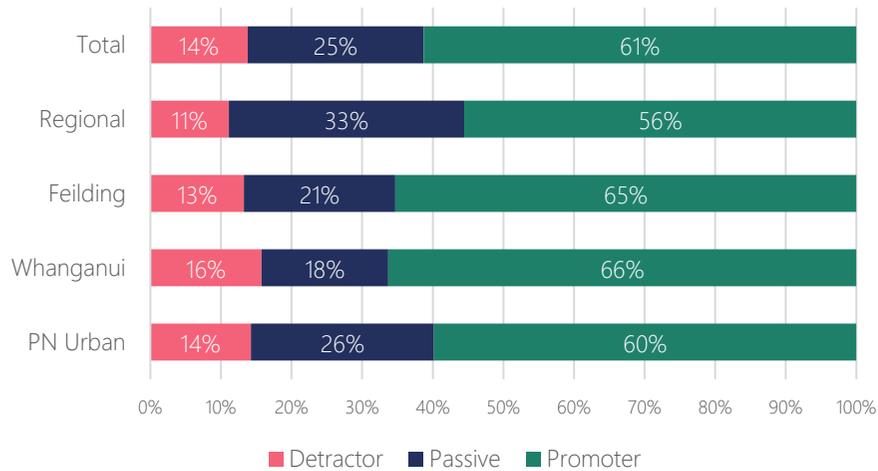Other (please specify) — n=45, 5%

- When it comes to boarding and alighting, passengers place the highest importance on clear bus route information and timetables (48%). Real-time bus tracking displays (42%) and bus stop weather protection (42%) are equally valued, highlighting the need for both accurate service updates and comfort while waiting. Accessibility at bus stops (40%) is also a key consideration, ensuring that facilities meet a wide range of mobility needs. Seating (25%) and overall bus stop condition (24%) are moderately important, while security and personal safety (23%) remain relevant for nearly a quarter of respondents.
- These findings point to a balanced need for timely information, physical comfort, and accessible infrastructure to enhance the boarding experience.

- Older passengers (65+) place the highest importance on bus stop accessibility (51%) and seating (34%), while those aged 18–24 prioritise real-time tracking displays (52%). Whanganui respondents value weather protection most (57%), while Feilding residents emphasise route information (50%).
- Regional users place the greatest importance on security (67%). Females rate accessibility slightly higher than males. SuperGold cardholders prioritise accessibility (49%) and weather protection (43%) more than non-cardholders.
- Frequent users (four or more times a week) focus on tracking displays (47%), while occasional or rare users value accessibility most (50%). Midday travellers show a marginally higher emphasis on accessibility (38%) and seating (27%) compared with morning or afternoon users.

n=918

NET PROMOTER SCORE

All respondents were asked: *"How likely is it that you would recommend using public transport here to a friend or colleague?"*

	Detractor	Passive	Promoter
Total	14%	25%	61%
Regional	11%	33%	56%
Feilding	13%	21%	65%
Whanganui	16%	18%	66%
PN Urban	14%	26%	60%

■ Detractor ■ Passive ■ Promoter

0	1	2	3	4	5	6	7	8	9	10
Detractors							Passives		Promoters	

+47%

- Overall Net Promoter Score is +47%, with 61% promoters, 25% passives, and 14% detractors. Scores are highest in Whanganui (+50%) and Feilding (+52%), and lowest in Regional areas (+45%). Promoter rates range from 56% (Regional) to 66% (Whanganui), with passives highest in Regional areas (33%).

- Significant differences appear by age and SuperGold status, with 65+ passengers and cardholders showing the strongest advocacy (73% promoters).
- NPS scores rise sharply with satisfaction, from 3.63 (dissatisfied) to 8.77 (satisfied), averaging 8.41 overall, indicating that improving passenger satisfaction directly increases likelihood to recommend and boosts positive advocacy for public transport services.
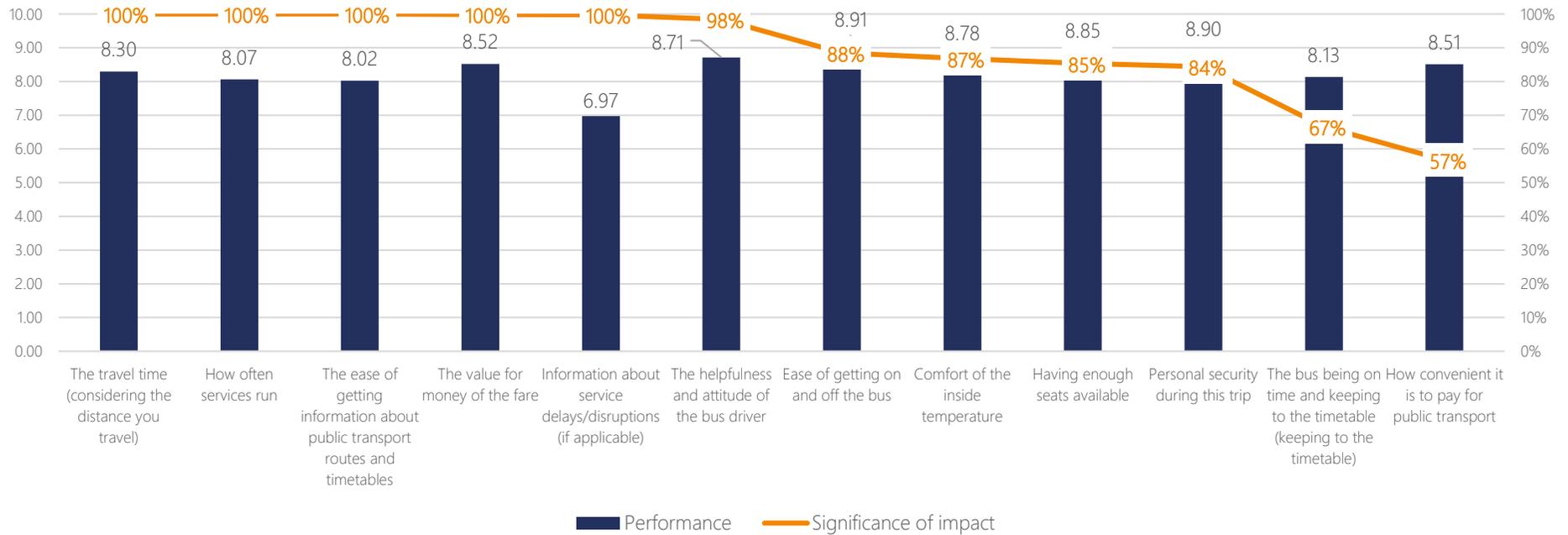
Satisfaction with public transport vs. NPS average score

	Dissatisfied	Neutral	Satisfied	Total
Score	3.63	6.13	8.77	8.41
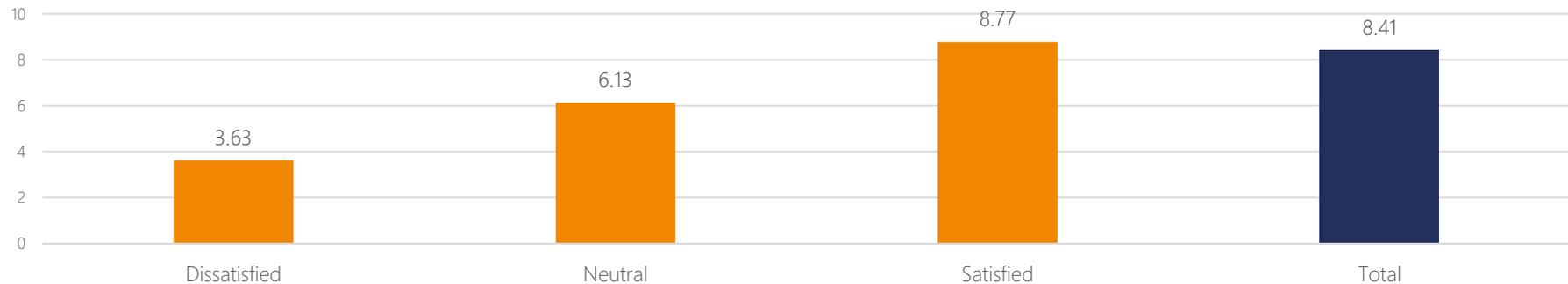
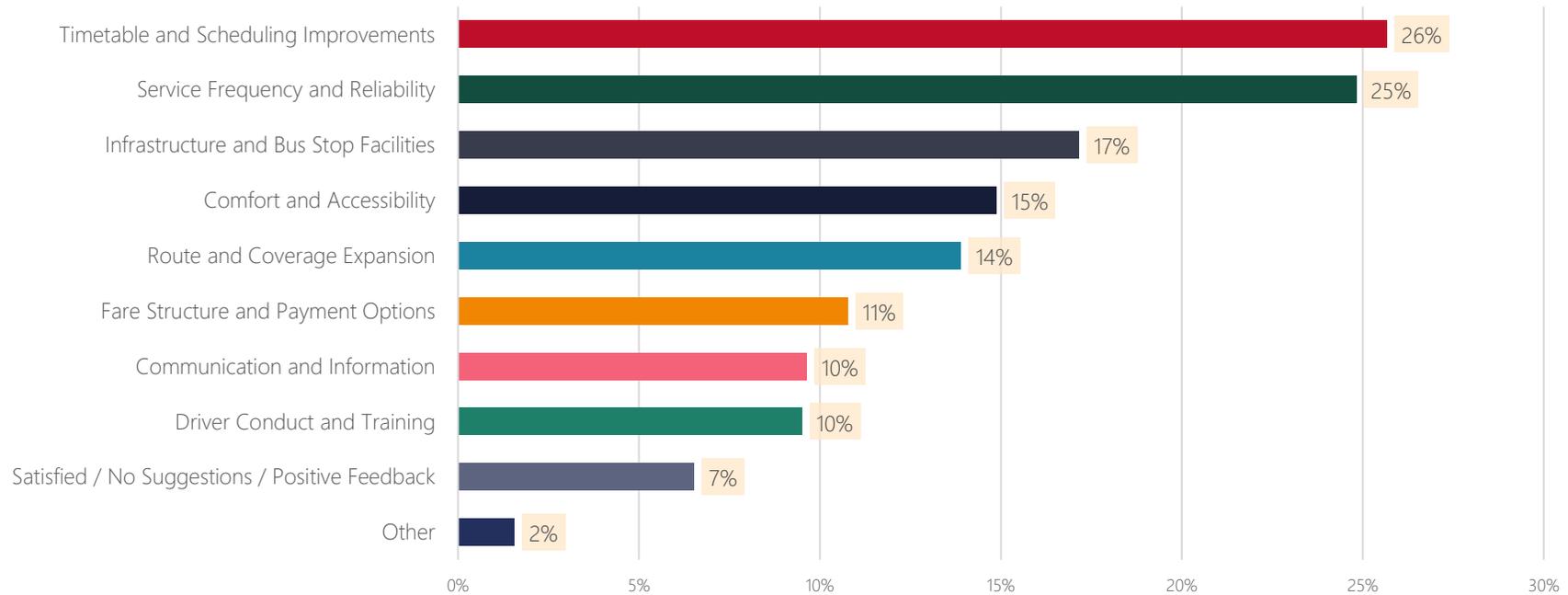*n=924*

PRIORITY ASSESSMENT

The chart below presents the results of a regression analysis used to determine which service features influenced overall satisfaction with public transport.

- The priority assessment highlights that several service features have maximum influence (100%) on overall satisfaction, making them critical improvement areas. Information about service delays/disruptions stands out as the top priority, combining very high influence with the lowest performance score (6.97).
- Other high-impact areas with room for improvement include travel time (8.30), how often services run (8.07), ease of getting information about routes/timetables (8.02), value for money (8.52), and helpfulness of the driver (8.71).
- High-impact areas already performing well include ease of getting on and off the bus (8.91), comfort of the inside temperature (8.78), having enough seats available (8.85), and personal security (8.90).

- While these score strongly, maintaining these standards remains important.
- Lower-influence areas such as the bus being on time (67% significance, 8.13) and how convenient it is to pay for public transport (57% significance, 8.51) contribute less to overall satisfaction but still present opportunities for enhancement.
- The analysis suggests that improving communication about service delays and addressing moderate gaps in frequency, travel time, and timetable information will have the greatest impact on public transport satisfaction.

SUGGESTED IMPROVEMENTS

All respondents were asked: "*What is the one thing you would suggest that could improve the services?*" Open-ended comments sorted into categories; totals may exceed 100%.

Category	Percentage
Timetable and Scheduling Improvements	26%
Service Frequency and Reliability	25%
Infrastructure and Bus Stop Facilities	17%
Comfort and Accessibility	15%
Route and Coverage Expansion	14%
Fare Structure and Payment Options	11%
Communication and Information	10%
Driver Conduct and Training	10%
Satisfied / No Suggestions / Positive Feedback	7%
Other	2%

- Passengers' top improvement priorities focus on timetable and scheduling (26%) and service frequency and reliability (25%), highlighting demand for more consistent, timely services. Infrastructure and bus stop facilities (17%), along with comfort and accessibility (15%), also feature strongly. Route and coverage expansion (14%) reflects interest in broader service reach. Fare structure and payment options (11%) remain a notable consideration, while communication and information, and driver conduct and training (both 10%) suggest opportunities to enhance passenger experience. A smaller share provided positive feedback or no suggestions (7%), and only 2% gave other ideas. These findings emphasise that operational reliability, network coverage, and passenger amenities are key areas for targeted investment to increase satisfaction and use.

- Age and SuperGold cardholder status showed statistically significant differences, with younger respondents prioritising frequency/reliability and older respondents more often citing route expansion, comfort, or accessibility.
- Frequent users focused on operational reliability and timetable adherence, while occasional or rare users highlighted infrastructure, bus stop facilities, comfort, and fare/payment structure.
- Gender, day of travel, and travel time showed no significant differences in improvement priorities.
- Overall, operational consistency and service coverage dominated feedback, supported by calls for better facilities, accessibility, and value for money.

n=705