

I hereby give notice that an ordinary meeting of the Passenger Transport Committee will be held on:

Date: Tuesday, 16 June 2026
Time: 10.00am
Venue: Tararua Room
Horizons Regional Council
11-15 Victoria Avenue, Palmerston North

PASSENGER TRANSPORT COMMITTEE

AGENDA

MEMBERSHIP

Chair	Cr JM Naylor	Horizons Regional Council
Deputy Chair	Cr HC Easton	Horizons Regional Council
	Cr BG Fraser	Horizons Regional Council
	Cr ETJ Pue	Horizons Regional Council
	Cr AR Taylor	Horizons Regional Council
	Cr J Mason	Horowhenua District Council
	Cr C Dyer	Manawatū District Council
	Cr B Barrett	Palmerston North City Council
	Cr J Wong	Rangitikei District Council
	Cr J Chapman	Ruapehu District Council
	Cr P Naylor	Tararua District Council
	Mr A Tonnon	Whanganui District Council

Michael McCartney
Chief Executive

Contact Telephone: 0508 800 800
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Palmerston North 4442

Full Agendas are available on Horizons Regional Council website
www.horizons.govt.nz

for further information regarding this agenda, please contact:
Julie Kennedy, 06 9522 800

CONTACTS	24 hr Freephone : 0508 800 800	help@horizons.govt.nz		www.horizons.govt.nz
SERVICE CENTRES	Kairanga Cnr Rongotea & Kairanga-Bunnythorpe Rds, Palmerston North	Marton 19-21 Hammond Street	Taumarunui 34 Maata Street	Woodville Cnr Vogel (SH2) & Tay Sts
REGIONAL HOUSES	Palmerston North 11-15 Victoria Avenue	Whanganui 181 Guyton Street		
DEPOTS	Levin 120-122 Hokio Beach Rd	Taihape 243 Wairanu Rd		
POSTAL ADDRESS	Horizons Regional Council, Private Bag 11025, Manawatū Mail Centre, Palmerston North 4442			

TABLE OF CONTENTS

1	Welcome / Karakia	5
2	Apologies and Leave of Absence	5
3	Public Forums / Deputations / Petitions	5
4	Supplementary Items	5
5	Members' Conflict of Interest	5
6	Confirmation of Minutes	
	Passenger Transport Committee meeting, 17 March 2026	7
7	Whanganui New Urban Bus Network 2026	
	<i>Report No: 26-98</i>	11
8	Passenger Transport Services General Update	
	<i>Report No: 26-99</i>	17
9	Customer Satisfaction Survey 2025 & Customer Experience Insights	
	<i>Report No: 26-100</i>	25
	<i>Annex A - Horizons Public Transport Customer Satisfaction Survey Report 2025</i>	33

AGENDA

1 Welcome/Karakia

2 Apologies and Leave of Absence

At the close of the Agenda no apologies had been received.

3 **Public Forums:** Are designed to enable members of the public to bring matters, not on that meeting's agenda, to the attention of the local authority.

Deputations: Are designed to enable a person, group or organisation to speak to an item on the agenda of a particular meeting.

Requests for Public Forums / Deputations must be made to the meeting secretary by 12 noon on the working day before the meeting. The person applying for a Public Forum or a Deputation must provide a clear explanation for the request which is subsequently approved by the Chairperson.

Petitions: Can be presented to the local authority or any of its committees, so long as the subject matter falls within the terms of reference of the council or committee meeting being presented to.

Written notice to the Chief Executive is required at least 5 working days before the date of the meeting. Petitions must contain at least 20 signatures and consist of fewer than 150 words (not including signatories).

Further information is available by phoning 0508 800 800.

4 Supplementary Items

To consider, and if thought fit, to pass a resolution to permit the Committee/Council to consider any further items relating to items following below which do not appear on the Order Paper of this meeting and/or the meeting to be held with the public excluded.

Such resolution is required to be made pursuant to Section 46A(7) of the Local Government Official Information and Meetings Act 1987 (as amended), and the Chairperson must advise:

- (i) The reason why the item was not on the Order Paper, and
- (ii) The reason why the discussion of this item cannot be delayed until a subsequent meeting.

5 Members' Conflict of Interest

Members are reminded of their obligation to declare any conflicts of interest they might have in respect of the items on this Agenda.

Minutes of the first meeting of the thirteenth triennium of the Passenger Transport Committee held at 10.00am on Tuesday 17 March 2026, in the Tararua Room, Horizons Regional Council, 11-15 Victoria Avenue, Palmerston North.

PRESENT

Crs JM Naylor (Chair), BG Fraser, HC Easton, ETJ Pue, AR Taylor (via Zoom), J Mason (Horowhenua District Council – via Zoom), C Dyer (Manawatū District Council), B Barrett (Palmerston North City Council), J Wong (Rangitīkei District Council), J Chapman (Ruapehu District Council), P Naylor (Tararua District Council), and Mr A Tonnon (Whanganui District Council).

IN ATTENDANCE

Chief Executive	Mr M McCartney
Councillor	NM Riley (to 10.57am).
Manager Transport Services	Mr M Read
Group Manager Regional Services and Information	Mr G Shirley
Committee Secretaries	Mrs JA Kennedy and Mrs R De Souza

ALSO PRESENT

At various times during the meeting:
Mrs C Hesselin (Executive Governance Support - Interim), Mr I Mills (Senior Transport Planner), Mr M Bray (Transport Planner), Mrs J Thorby (Senior Transport Planner), Mr B Leah (Senior Transport Planner), Mrs D Monks (Total Mobility Coordinator), Mr Q Duong (Transport System Advisor), Ms A Rasmussen (Transport Support Officer), Mrs S Foale (Transport Administrator), Mr J Galuszka (Senior Communications Advisor), Cr C Grimstone (Horowhenua District Council via Zoom), Mrs J Rankin (Manawatū Standard), and Mr M Wasley (Member of the Public).

Public Forum: Ms J Hetherington (Rongotea Resident), Mr G Holloway (Interim Chair, Whanganui Residents and Ratepayers Association), Mr Russell Hallam (Chair, Age Friendly Palmerston North), Mrs K Hocquard (Secretary, Age Friendly Palmerston North), and Mr Ross Hallam (Committee Member, Age Friendly Palmerston North).

The Chair welcomed everyone to the meeting with a karakia.

APOLOGIES

There were no apologies.

PUBLIC FORUMS / DEPUTATIONS / PETITIONS

Joy Hetherington (Rongotea Resident), voiced the concerns of the Rongotea Village and wider community at the loss of the high school bus service as a result of a Ministry of Education decision to remove the service. She advocated for Horizons Regional Council to consider partial funding of a bus service that residents had put in place, or alternatively provide a public bus transport service.

Graham Holloway (Interim Chair, Whanganui Residents and Ratepayers Association), expressed concern about the impact on ratepayers due to the significant increase in the Horizons Regional Council rates portion for public bus services. Mr Holloway also commented on the number of empty buses and noted that some areas in Whanganui did not receive a public bus service.

Russell Hallam (Chair, Age Friendly Palmerston North) and **Kerry Hocquard** (Secretary, Age Friendly Palmerston North), provided feedback on the submission to the Ministry of Transport on the Proposal to strengthen the Total Mobility Scheme.

SUPPLEMENTARY ITEMS

PT 26-1 **Moved** **J Naylor/Easton**

That the Committee receives Annex C to Report No. 26-37, "Public Transport Governance Group Draft Terms Of Reference", as a Supplementary Item.

CARRIED

MEMBERS' CONFLICTS OF INTEREST

Mr A Tonnon declared a possible conflict of interest due to his role as operator of the Durie Hill elevator.

PASSENGER TRANSPORT COMMITTEE FUNCTIONS, MEMBERSHIP AND KEY WORK PROGRAMME

Report No 26-37

This item provided Members with an overview of the Passenger Transport Committee's functions, the key roles of the Transport Services team, and provided information on key work programmes for the year. Mr Read (Manager Transport Services) elaborated further on each of the work programmes and functions and noted the draft Terms of Reference at Annex C. Members debated the activities in the work programme and provided their comment.

PT 26-2 **Moved** **Fraser/Tonnon**

That the Committee recommends that Council:

- a. *receives the information contained in Report No. 26-37 and Annexes.*
- b. *approves the draft Terms of Reference in Annex C, as the basis for the terms of reference for Palmerston North, Whanganui, Manawatū and Horowhenua Public Transport Governance Groups, noting that these may be updated depending on local context.*

CARRIED

PASSENGER TRANSPORT SERVICES GENERAL UPDATE

Report No 26-38

This item updated Members on Horizons public transport services, their performance and updated on projects taking place across the region. Ms Thorby (Senior Transport Planner) took Members through the detail of the Whanganui Services Implementation. Mr Mills (Senior Transport Planner) presented a power point detailing the passenger transport performance.

PT 26-3 **Moved** **Pue/Easton**

That the Committee recommends that Council:

- a. *receives the information contained in Report No. 26-38 and Annex.*

CARRIED

TOTAL MOBILITY SCHEME UPDATE

Report No 26-39

This item informed Members on the Total Mobility scheme across the region, from 1 July 2025 to 31 December 2025. Mr Read (Manager Transport Services) introduced the report and noted that the figures were for a six month period – July to December 2025.

PT 26-4 Moved Tonnon/P Naylor

That the Committee recommends that Council:

- a. receives the information contained in Report No. 26-39.*

CARRIED

EXTENSION OF MEETING

PT 26-5 Moved J Naylor/Pue

That the Committee suspends Standing Order 4.2, in order that the meeting can continue with business on the agenda beyond the two hour limit, without a ten minute break.

CARRIED

SUBMISSION ON THE PROPOSAL TO STRENGTHEN THE TOTAL MOBILITY SCHEME

Report No 26-40

Mr Read (Manager Transport Services) spoke to the item which was for the Committee to make a recommendation to the Horizons Regional Council Chair, on a submission to the Ministry of Transport Te Manatū Waka on the Proposal to strengthen the Total Mobility scheme. Members debated the contents of the submission and provided their feedback.

PT 26-6 Moved Barrett/Chapman

That the Committee recommends that Council:

- a. receives the information contained in Report No. 26-40 and Annex.*
- b. agrees that, in accordance with Council's Significance and Engagement Policy, the decisions in this report are not significant, and the appropriate level of engagement is: inform.*
- c. that the Horizons Regional Council Chair make the submission in Annex A on behalf of Horizons Regional Council.*
- d. authorise the Chair to make any minor editorial changes to the submission prior to its lodgement.*

CARRIED

The Chair closed the meeting at 12.12pm with a karakia from the Chair.

Confirmed

MANAGER TRANSPORT SERVICES

CHAIR

Report No.	26-98
Information Only - No Decision Required	

WHANGANUI NEW URBAN BUS NETWORK 2026

1. PURPOSE

- 1.1. To provide an update on Whanganui's new Public Transport network, implemented 17 April 2026.

2. EXECUTIVE SUMMARY

- 2.1. Following the success of the first high frequency route for Whanganui in 2023 (Te Ngaru The Tide), and based on community feedback, further investment was confirmed for the new Whanganui network. Through the Long-Term Plan 2024-34 Horizons' Councillors voted to maintain funding of the local share portion even though NZTA halted contributions to new services. In turn, officers designed a network based on half of the funding available and finding efficiencies in the current network. Improvements can still be made and built on as more funding becomes available.
- 2.2. Te Ngaru helped to reverse a nine-year patronage decline for the city while trying something new, and helped to shape the direction going forward for the bus network both now and into the future. The new network continues to support a frequency-based system, while still offering coverage routes to some parts of the city.
- 2.3. Benefits of the new efficient, simple and convenient bus network include reducing routes from 17 to 5 across the city. These are made up of two high frequency routes (similar to what was implemented for Te Ngaru) operating every 20 minutes, and 3 hourly routes with extended hours of operation through the day. These routes include new areas of the City such as Pūtiki. Services also operate on Sundays. Both high frequency routes provide coverage to schools to ensure increased access within the new network. The new network launched on Friday 17 April, also World Public Transport Day.
- 2.4. The new Whanganui bus network has delivered a significant early increase in patronage, with 31,411 passenger trips recorded in the first month of operation. This represents a 110% increase compared to the same period in 2025, with strong growth across all days of the week, including weekends.
- 2.5. Early results indicate that the move to a simpler, more frequent and customer-focused network is achieving its intended outcomes, providing a strong foundation for continued growth and ongoing network refinement.

3. RECOMMENDATION

That the Committee recommends that Council:

- a. receives the information contained in Report No. 26-98.
- b. agrees that, in accordance with Council's Significance and Engagement Policy, the matters in this report are not significant, and the appropriate level of engagement is: inform

4. STRATEGIC ALIGNMENT

- 4.1. Council Strategic Priorities

- Connecting people and place through effective public transport connections

4.2. Council's Community Outcomes



Our region has effective transport networks

4.3. The matters in this report align with the following adopted policies, strategies and plans:

- Regional Public Transport Plan
- Regional Land Transport Plan

5. SIGNIFICANCE AND ENGAGEMENT

5.1. Significance Assessment

5.1.1. Council's Significance and Engagement Policy is not triggered by matters discussed in this report.

5.2. Engagement section:

5.2.1. No stakeholder engagement is required.

6. FINANCIAL IMPACT

6.1. There is no financial impact as a result of this report.

7. CLIMATE IMPACT

7.1. Climate Impact Statements

7.2. There are no direct climate impacts associated with this report. However, increased public transport patronage contributes to broader emissions reduction outcomes.

8. RISK

8.1.1. No Risks have been identified

9. BACKGROUND

9.1. The Whanganui bus network contract has been in place since 2019 and is nearing its conclusion (2028). Patronage declined over multiple years due to low frequency services, but improved in 2023 when Te Ngaru was introduced.

9.2. The 2019 network was designed on a coverage model, meaning services went down most streets with bus stops close to home and with less than 400m spacing in between. Frequency of services was low - hourly or only three services a day and lacked efficiency, which contributed to poor uptake.

9.3. The Tide/Te Ngaru route was a trial of designing our network differently, operating every 20 minutes from 7am to 7pm, crossing through several suburbs and the city centre. Te Ngaru was designed to trial moving from a coverage-based system to a frequency model.

9.4. Building on this, the new Whanganui urban bus network was designed in collaboration with the Whanganui Public Transport Governance Group, and in March last year went out for

public consultation. This was undertaken alongside the Horizons' Annual Plan consultation, and of the 394 responses, 84% were supportive of investing in Whanganui's Public Transport network. From there, network design refinements were made. In August 2025 a second round of consultation was undertaken. This was a final sense check with the community around network design and bus stop placement. 172 responses were received, which had 75% support for network improvements.

- 9.5. Following consultation, timetables were developed, and work was undertaken to support the operator securing an extra fourteen drivers to support this network growth.

10. COMMUNICATIONS AND MARKETING CAMPAIGN

- 10.1. A comprehensive marketing campaign was carried out four weeks prior to implementation, which included multiple community engagement sessions (Gonville Library groups, Kaumatua exercise sessions, school bus supervisors) and presence at events such as the River Market to support the community with the transition. Fares were also free for the first month, to encourage the community to give the new services a go.
- 10.2. As part of communicating the upcoming changes to the Bus Network, Whanganui District Council elected members were briefed and invited to attend community events alongside Horizons elected members and officers. Both Councils worked in partnership to ensure supporting infrastructure changes were implemented.
- 10.3. Communications campaign tactics carried out were:
- Radio advertising
 - Newspaper advertising & letterbox drop
 - Digital advertising
 - Social media (both organic and paid)
 - Whanganui Riverside Markets stalls
 - Bus back advertising
 - Collateral available at various locations, including on buses, at libraries and community hubs, and Whanganui District Council's office
 - Footpath decals





- 10.4. During the campaign 36 pieces of content were published to Connect social media accounts, getting 148,000 impressions (times content was displayed to people) and 5201 engagements (comments, reactions, shares, favourites). We had an overall engagement rate (engagement divided by impressions) of 3.5%. For context, anything over 3% is considered very good.
- 10.5. We held two launch events to celebrate the new network, a morning blessing and evening launch event. We had a Pūtiki blessing in the morning with kaumatua and kuia from the local community. This was an opportunity to acknowledge the engagement and advocacy from the local community, celebrate services to a new area, and take locals on a ride to show them where their new bus route would go. Pictured below are some of the locals at their bus shelter who have [advocated for services](#).

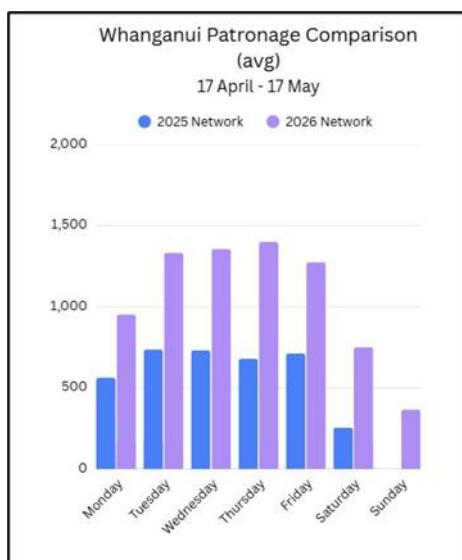


11. DISCUSSION

- 11.1. The new network started on 17 April 2026, which was also the first World Public Transport Day. Fares were free for the first month to encourage the public to give the new network a go.
- 11.2. During the two weeks pre-and-post network launch, customer service champions were based on buses and at the main terminal to answer any queries the public had and support the transition to the new network. This meant drivers could focus on driving the new routes, and customers were supported to overcome any potential challenges in understanding the new routes, providing confidence in the new network. We received positive feedback from both the public and the drivers on how beneficial having these people on the ground were. They also returned the week after free fares ended, to ensure passengers had a bee card and any concessions needed were loaded efficiently. Being able to answer queries on the street took pressure off the Horizons Customer Services team and enabled a seamless network transition.
- 11.3. Following the first month of operation the new network recorded 31,411 passenger trips, an 110% increase on the same month in 2025 (14,994 passenger trips). While we ran free

fares for the first month so people could try out the new network, this patronage growth goes well beyond what we usually see when we put free fares on for events such as Palmerston North New network launch, Whanganui Vintage Weekend and Christmas parades.

- 11.4. There has been patronage growth on all days of the week, with weekend services – including the new Sunday services – operating well.
- 11.5. Below is a graph that compares the average total patronage with the same days in 2025 on the old network, to the new network. There is also a table of the average percentage increase per weekday over the first month.



Day	2025 Network	2026 Network	% Increase
Monday	563	953	69.27%
Tuesday	737	1,334	81.04%
Wednesday	732	1,357	85.35%
Thursday	680	1,402	106.33%
Friday	713	1,276	78.96%
Saturday	256	752	194.11%
Sunday		367	

- 11.6. While only capturing less than two weeks worth of trips, patronage has remained strong for the period after fares have returned. The network has averaged 1,013 passenger trips on weekdays, 550 passenger trips on Saturdays and 202 passenger trips on Sundays.
- 11.7. The increase in patronage reflects the shift to a frequency-based network design, which prioritises ease of use, consistent service patterns and improved access to key destinations. The introduction of additional high-frequency routes, expanded weekend services, and new coverage areas such as Pūtiki has made the network more accessible and attractive for a wider range of trips.
- 11.8. The early success of the new network demonstrates progress towards Council's strategic priority of connecting people and place through effective public transport, as well as supporting a shift toward more sustainable and accessible transport choices.

12. TIMELINE / NEXT STEPS

- 12.1. Officers will continue to monitor patronage trends, customer feedback and operational performance to identify opportunities for further refinements to the network. This will be reported back through the Whanganui Public Transport Governance Group.
- 12.2. The new contract will be tendered in 2027 following system refinements to ensure it is operating as we would expect. The future contract will commence in October 2028.

Author(s) Jayme Thorby
 Senior Transport Planner

 Mark Read
 Manager Transport Services

Approved by Ged Shirley
 **Group Manager Regional Services &
 Information**

 Michael McCartney
 Chief Executive

 Nikki Riley
 Chair

ANNEXES

There are no attachments for this report.

Report No.	26-99
Information Only - No Decision Required	

PASSENGER TRANSPORT SERVICES GENERAL UPDATE

1. PURPOSE

- 1.1. To update members on Horizons public transport services, their performance and update on projects taking place across the region.

2. EXECUTIVE SUMMARY

- 2.1. This report provides an update on public transport services across the Horizons region, including service performance, key projects, and national programme developments impacting the delivery of public transport.
- 2.2. Public transport services across the region continue to perform well, with strong patronage growth following network improvements in Palmerston North and ongoing implementation of changes in other parts of the network. This reflects the positive response to investments in more frequent, reliable and accessible services.
- 2.3. Work programmes to improve and expand the network are progressing, including the implementation of the new Whanganui network, transition of the Feilding services to a new contract and fleet, and development of future services in Horowhenua and across the wider regional network.
- 2.4. Significant national programmes will continue to shape public transport delivery in the region. The **Lower North Island Rail Integrated Mobility (LNIRIM)** programme is progressing, with delivery focused on managing key risks and advancing design and procurement. The National Ticketing Solution (Motu Move) is also progressing, with the Manawātū-Whanganui region currently expected to transition to the new system in the third quarter of 2027. Work is underway locally to prepare for this rollout, including pre-wiring of the bus fleet.
- 2.5. Council decisions and national policy changes continue to influence the financial sustainability of public transport services. In March 2026, Council resolved to maintain the existing Total Mobility fare cap at \$20.00, recognising the importance of the scheme for providing accessible transport to vulnerable members of the community.
- 2.6. Overall, the public transport system in the Horizons region continues to perform strongly, with ongoing investment supporting increased patronage and improved customer outcomes. The focus remains on delivering planned network improvements and preparing for national system changes.

3. RECOMMENDATION

That the Committee recommends that Council:

- a. receives the information contained in Report No. 26-99.
- b. agrees that, in accordance with Council's Significance and Engagement Policy, the matters in this report are not significant, and the appropriate level of engagement is: inform.

4. STRATEGIC ALIGNMENT

4.1. Council Strategic Priorities

- Connecting people and place through effective public transport connections

4.2. Council's Community Outcomes



Our region has effective transport networks

4.3. The matters in this report align with the following adopted policies, strategies and plans:

- Regional Public Transport Plan
- Regional Land Transport Plan

5. SIGNIFICANCE AND ENGAGEMENT

5.1. Significance Assessment

5.1.1. Council's Significance and Engagement Policy is not triggered by matters discussed in this report.

5.2. Engagement section:

5.2.1. No stakeholder engagement is required.

6. FINANCIAL IMPACT

6.1. There are no financial impacts as a result of this report.

7. CLIMATE IMPACT

7.1. Climate Impact Statements

7.2. There are no direct climate impacts associated with this report. However, increased public transport patronage contributes to broader emissions reduction outcomes.

8. RISK

8.1.1. No Risks have been identified.

9. Palmerston North Bus Services

9.1. The Palmerston North bus network continues to perform strongly following the introduction of the redesigned network in March 2024. The new network was developed to provide a simpler, more direct and higher frequency service, replacing the previous coverage-based model which was characterised by indirect routes, low frequency services and long travel times. Since implementation, the network has consistently delivered improved usability and accessibility, supporting sustained growth in patronage.

9.2. Patronage across the Palmerston North network has increased significantly since the network redesign, with over 2.5 million passenger trips recorded since launch. Annual patronage has grown from approximately 701,000 trips prior to the new network to over 1 million trips in the first year of operation, with further growth to over 1.18 million trips in the second year. Monthly patronage has consistently exceeded the same period in the

previous year since implementation, demonstrating strong and sustained demand for the new service model.

- 9.3. While the network is performing well overall, a number of operational pressures have emerged as a result of increased demand. Capacity constraints are being experienced on several key routes, particularly during peak periods on major corridors such as Fitzherbert Avenue, Featherston Street and around key trip generators including schools and tertiary institutions. In some instances, buses are reaching capacity limits, resulting in passengers being unable to board services. These pressures are expected to continue as patronage increases.
- 9.4. Punctuality and reliability of services also remain a challenge, particularly during the afternoon peak period. Services can experience delays as they approach the city centre, with congestion on key corridors such as Main Street, Rangitikei Street and Fitzherbert Avenue impacting on-time performance. Once delays occur, services can struggle to recover throughout the remainder of the peak period, affecting the overall reliability of the network.
- 9.5. Bus stop infrastructure on key corridors is increasingly constraining network performance. Many of the busiest stops in the city centre and along high frequency corridors were designed for a lower intensity network and are not suited to current demand levels. Issues include limited capacity within bus bays, poor visibility between buses and passengers, and inadequate accessibility and passenger amenity. These constraints are affecting both bus operations and general traffic flow, and are contributing to delays and missed passengers.
- 9.6. Officers are continuing to work with Palmerston North City Council to address these challenges, including investigation of targeted infrastructure improvements, network refinements and operational adjustments. There is an opportunity to prioritise investment along key corridors, improve bus stop infrastructure, and consider adjustments to service frequency and fleet to better meet demand.
- 9.7. Overall, the Palmerston North network is delivering strong outcomes and demonstrates the success of the move to a frequency-based public transport system. The current focus is on managing growth, addressing emerging capacity and reliability constraints, and identifying opportunities for targeted investment to support continued improvement in network performance.
- 9.8. For a period of two months, commencing from the last Passenger Transport Committee, the **Main Street Bus Hub (MSBH)** was temporarily and partially closed off due to construction work being undertaken by **Palmerston North City Council (PNCC)**. Platform 2 was temporarily closed to all buses. This resulted in a platform relocation for all Platform 2 departures. Rather than re-locating the entire bus hub, PNCC temporarily removed car-parking on Main St to create space for all Platform 2 departures to stop for passengers. Disruptions were minimal considering the level of disruption to services, and Horizons and PNCC officers worked well to resolve and minimize any operational issues. There was no known disruption to ridership, but Horizons Officers did have a minor increase in passenger complaints regarding the platform relocation.

10. Feilding Bus Services

- 10.1. The Feilding bus service is transitioning to a new contract, with Tranzit Coachlines scheduled to commence operations on 4 July 2026. This follows a comprehensive procurement process and builds on earlier engagement undertaken with the Manawātū community through the “Moving Manawātū” programme. The new contract represents a step change in service delivery, with a stronger focus on improving frequency, coverage and overall usability of the network.

- 10.2. The redesigned network will provide a simpler and more direct connection between Feilding and Palmerston North, alongside improvements to service frequency across both the commuter and the Feilding Orbiter routes. Weekend services will be significantly enhanced, including the introduction of Sunday services for the first time, improving access for a wider range of trips and supporting more consistent travel patterns throughout the week.
- 10.3. The new contract will also introduce a fully electric fleet to the Feilding network, contributing to Horizons' broader objective of transitioning to low-emissions public transport. Three higher-capacity electric buses will operate on the Feilding to Palmerston North commuter route, supported by a smaller vehicle for local Orbiter services. This investment improves both passenger experience and environmental outcomes, while aligning with regional climate objectives.
- 10.4. Implementation is well progressed, with all vehicles now in New Zealand and undergoing final preparation, including installation of Connect branding and ticketing systems. A staged delivery approach has been used to support the transition, incorporating early service adjustments and ensuring sufficient time for operational planning, communications and staff readiness ahead of the contract start date.
- 10.5. A targeted communications and engagement programme is underway to support the introduction of the new services. This includes community engagement at local events such as the Feilding Farmers Market, as well as direct engagement with key community groups and users. These activities are designed to ensure passengers are well informed of the changes and confident in using the updated network from day one.
- 10.6. Overall, there is a high level of confidence that services will commence as planned on 4 July 2026. The new contract provides a strong foundation for future growth in patronage by delivering a more frequent, reliable and attractive public transport offering for the Manawātū district.

New Service Outcomes



- Simple, direct connection between Feilding & Palmerston North
- Better frequency on all routes, including Weekend services
- More coverage in Feilding
- More consistent and easy to understand timetable.

Route	Current Departures (Weekday / Saturday)	Departures from 4 July (Weekday / Weekend)	Change from Current Contract
301 Feilding Orbiter	10 Weekday / 5 Saturday	11 Weekday / 6 Weekend	+1 Weekday +1 Weekend + Sunday
311 To Palmerston North	14 Weekday / 5 Saturday	16 Weekday / 11 Weekend	+2 Weekday +6 Weekend + Sunday
311 To Feilding	14 Weekday / 5 Saturday	16 Weekday / 11 Weekend	+2 Weekday +6 Weekend + Sunday

CONNECT HORIZONS REGIONAL TRANSPORT

11. Ashhurst Bus Network Services Implementation Update

- 11.1. Work is progressing to introduce new public transport services for students travelling between Ashhurst and Palmerston North, following changes to Ministry of Education school bus provision. This has created a need for a locally delivered solution to ensure continued access to education for students in the community.

- 11.2. Officers have worked with local schools and stakeholders to understand current travel patterns and confirm service requirements. Feedback from schools has emphasised the importance of maintaining existing service levels to support reliable access to education.
- 11.3. The proposed services are intended to largely replicate existing school transport routes, with some refinements to improve efficiency and integration with the wider public transport network. This approach supports a smooth transition for students while aligning the services with Horizons' broader public transport framework.
- 11.4. Procurement for the new services has now been completed, with Tranzit confirmed as the successful tenderer. In addition, Horizons has entered into a funding agreement with the Ministry of Education, which will provide co-funding for the first year of the service.
- 11.5. With procurement and funding arrangements now confirmed, all key approvals for the service are in place. The new bus service will be introduced from the start of Term 3 2026, ensuring continuity of access to education for Ashhurst students as Ministry of Education bus services are withdrawn.
- 11.6. These services represent a proactive response by Horizons to ensure continued access to education for the Ashhurst community, while transitioning to a locally delivered public transport solution.

12. Horowhenua public transport services update

- 12.1. The Horizons **Long Term Plan 2024–34 (LTP 2024)** identified an intention to work with Horowhenua District Council and key stakeholders to develop a future public transport network for the Horowhenua District, including Levin. This work was aimed at establishing a fit-for-purpose service that responds to local growth and provides improved transport connections within the district and to the wider region.
- 12.2. While funding was initially allocated through the LTP 2024 to support the introduction of new public transport services in Horowhenua, Council resolved in May 2026 to defer this funding. As a result, implementation of new services will be delayed, and the focus has shifted toward continued planning and engagement to ensure the network is well defined and supported when funding becomes available.
- 12.3. The Horowhenua Public Transport Governance Group, which includes representation from both the District and Regional Councils, will continue to work with officers to progress planning for a future network. This work will focus on developing a clear understanding of community needs, travel patterns and service expectations, ensuring that any future investment is well targeted and aligned with local priorities.
- 12.4. A two-phase community engagement programme is planned to support this work. The first phase, scheduled for August and September 2026, will focus on establishing baseline information on community transport needs, desired levels of service, and willingness to pay. This will provide an evidence base to inform future network design and investment decisions.
- 12.5. This approach ensures that when funding becomes available, Horizons is well positioned to deliver a service that reflects community needs and supports long-term growth in the Horowhenua District.

13. LNIRIM Programme Update

- 13.1. The **Lower North Island Rail Integrated Mobility (LNIRIM)** Programme is progressing well overall, with programme elements continuing to advance in line with expected delivery timeframes. A number of items remain under active management, but current assessments indicate that these can be addressed without impacting the overall programme delivery.
- 13.2. The rolling stock package is currently in the early stages of design with supplier Alstom. Design development is progressing, supported by ongoing engagement with stakeholders

to inform layout and functionality. Initial workshops, including with accessibility groups, cycling advocates and operational staff, have been well received and have provided valuable input into the design process.

- 13.3. Progress has continued across other key programme components, including the advancement of maintenance depot delivery, station planning and wider infrastructure design. Engagement with stakeholders, including iwi groups in relation to Ōtaki and Levin stations, is ongoing and showing positive progress.
- 13.4. A key focus area for the programme remains the treatment of level crossings on the Manawātū line. Prioritisation work and engagement with regulators and funding partners is underway to determine an appropriate approach. This includes consideration of both safety requirements and funding implications associated with any potential mitigation measures required to support increased rail services.
- 13.5. Overall, the programme continues to make steady progress and remains on track to deliver its intended outcomes. The current focus is on progressing design and procurement activities, managing identified risks, and maintaining alignment across delivery partners to support successful implementation.

14. National Ticketing Solution (Motu Move)

- 14.1. Horizons officers continue to work closely with the **New Zealand Transport Agency Waka Kotahi (NZTA)** on the implementation of the National Ticketing Solution (NTS), which will introduce a new national public transport payment system known as Motu Move. This programme is a partnership between NZTA and Public Transport Authorities across New Zealand, including Horizons, aimed at providing a consistent and user-friendly approach to paying for public transport across the country.
- 14.2. Motu Move will provide customers with a range of flexible payment options, including contactless debit and credit cards, mobile payment methods such as Apple Pay and Google Pay, as well as a prepaid Motu Move card and pre-purchased tickets. This will replace the current regionally-based ticketing systems (Bee Card in the Horizons Region) over time and make it easier for passengers to use public transport both within and between regions.
- 14.3. The introduction of a national ticketing system is expected to improve customer experience by simplifying the way people access and pay for public transport, while also supporting increased patronage. In addition, the system will provide improved data on public transport usage, enabling more targeted planning and service improvements over time.
- 14.4. Motu Move has already been introduced in Greater Christchurch, with rollout occurring on a staged, region-by-region basis. Information presented by NZTA to the Regional Transport Committee indicates that the Manawātū-Whanganui region is currently expected to go live in the third quarter of 2027. This timeframe remains subject to ongoing programme delivery and national rollout sequencing.
- 14.5. As part of preparing for the introduction of Motu Move, work is underway across the Horizons region to pre-wire buses to enable installation of the new ticketing equipment. Progress to date shows that pre-wiring has been completed on a number of vehicles across operators, with further installations currently underway, including at depots in Palmerston North and Whanganui. This work will ensure the fleet is ready to support the rollout of the new system once implementation timeframes are confirmed.

15. Public Transport Private Share

- 15.1. The Government Policy Statement on Land Transport sets an expectation that Public Transport Authorities and NZTA will work towards increasing public transport private share by 30 June 2027, including the establishment of annual targets to support this objective.

- 15.2. In response to this direction, NZTA has worked with Public Transport Authorities, including Horizons, to confirm regional private share targets and supporting forecasts over the next three years. This has required the development of a comprehensive view of expected patronage, revenue and initiatives to influence fare recovery and mode choice.
- 15.3. Options to respond to this policy direction were previously presented to the Passenger Transport Committee and Council, with a preferred approach selected that aligns fare recovery with the parameters set through the Long Term Plan. As a result, fare increases have been implemented during the 2025/26 year, with further increases planned for 2026-27, including an increase in the one-zone adult smartcard fare from \$2.00 to \$2.75 over this period.
- 15.4. Based on current forecasts and ongoing monitoring, NZTA has advised that the region is unlikely to meet its originally indicative private share targets for 2025-26 and 2026-27. Following discussion between Horizons and NZTA, an updated private share target of 10.3% has been agreed for 2026-27.
- 15.5. While the revised target reflects current operating conditions, it does not change the direction of travel. Horizons will continue to implement planned initiatives to improve private share, including fare adjustments and network improvements that support increased patronage and revenue.

16. Total Mobility

- 16.1. The Total Mobility scheme continues to play a critical role in providing accessible transport for people with long-term disabilities or mobility issues across the Horizons region. Demand for the scheme has increased significantly in recent years, reflecting both growth in registered users and increased usage of subsidised trips.
- 16.2. In March 2026, Council considered the future of the regional Total Mobility fare cap in response to increasing financial pressures on the scheme and upcoming Government-mandated changes to subsidy levels. From 1 July 2026, the national subsidy will reduce from 75% to 65%, alongside an expectation from central government that regional fare caps be reduced.
- 16.3. Following consideration of the available options, Council resolved to maintain the existing regional fare cap of \$20.00 per trip. This decision reflects the importance of the scheme in supporting some of the most transport-disadvantaged members of the community, and recognises that reducing the fare cap would have increased the cost of travel for users, particularly for longer trips.
- 16.4. While maintaining the current fare cap will limit potential savings to Council, it ensures continued affordability for users at a time when other changes to the scheme, including reduced national subsidy levels, will increase out-of-pocket costs for many clients. The decision provides certainty for users and supports continued access to essential transport for medical, social and community participation purposes.
- 16.5. Officers will continue to monitor the financial performance of the Total Mobility scheme and engage with NZTA on the implementation of national changes. Further updates will be provided to the Committee as these changes take effect and as longer-term funding and policy settings are clarified.

17. TIMELINE / NEXT STEPS

- 17.1. Key upcoming milestones include the commencement of the Feilding bus services on 4 July 2026, introduction of the Ashhurst school bus services in Term 3 2026, and continued monitoring and refinement of recently implemented networks.

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ANNEXES

There are no attachments for this report.

Report No.	26-100
Information Only - No Decision Required	

CUSTOMER SATISFACTION SURVEY 2025 & CUSTOMER EXPERIENCE INSIGHTS

1. PURPOSE

- 1.1. To provide the Passenger Transport Committee with the key findings from the 2025 Horizons Regional Council Public Transport Customer Satisfaction Survey, and relevant national customer research from the **NZ Transport Agency Waka Kotahi (NZTA)** Customer Journey Monitor.
- 1.2. This report presents both local and national customer insights to support decision-making and identify priorities for improving public transport services across the region.

2. RECOMMENDATION

That the Committee recommends that Council:

- a. receives the information contained in Report No. 26-100 and Annex.
- b. agrees that, in accordance with Council's Significance and Engagement Policy, the matters in this report are not significant, and the appropriate level of engagement is: inform

3. STRATEGIC ALIGNMENT

- 3.1. Council Strategic Priorities
 - Connecting people and place through effective public transport connections
- 3.2. Council's Community Outcomes



Our region has effective transport networks

- 3.3. The matters in this report align with the following adopted policies, strategies and plans:
 - Regional Land Transport Plan
 - Regional Public Transport Plan

4. SIGNIFICANCE AND ENGAGEMENT

- 4.1. Significance Assessment
 - 4.1.1. Council's Significance and Engagement Policy is not triggered by matters discussed in this report.
- 4.2. Engagement section:
 - 4.2.1. No stakeholder engagement is required.

- 4.2.2. The Horizons Customer Satisfaction Survey has been available to the public on the Horizons website since it was completed.

5. FINANCIAL IMPACT

- 5.1. There are no financial impacts as a result of this item.

6. CLIMATE IMPACT

- 6.1. Climate Impact Statements
- 6.2. As the report details entirely on administrative matters, there is no climate change impact associated with this report.

7. RISK

- 7.1. The following risks have been identified in relation to the matters raised in this report:
- 7.2. No Risks have been identified

8. BACKGROUND

- 8.1. Customer satisfaction surveys are a requirement of NZTA as part of public transport performance monitoring.
- 8.2. Surveys are undertaken biennially in line with NZTA requirements and the Horizons **Regional Public Transport Plan (RPTP)**.
- 8.3. The 2025 survey was undertaken by SIL Research using a methodology consistent with 2022 to ensure comparability over time.
- 8.4. NZTA has developed a list of common questions that will form the core of individual public transport customer satisfaction surveys for scheduled services. This set of questions will allow national statistics to be developed for the purpose of accountability reporting to government and allow benchmarking between approved organisations and between operators.
- 8.5. Fieldwork was undertaken from 17 June to 18 July 2025, with 948 responses included in the analysis.
- 8.6. The survey, once finalised, was made available to the public by being published on the Horizons website. It has been reported to NZTA and is now being reported to the Committee for fullness.
- 8.7. The survey can be used to further understand customers: trip destinations, reasons for travel, satisfaction with specific trips, satisfaction level with buses and their overall services, likelihood of recommending the bus services in the region and any suggested improvements.
- 8.8. The information obtained through this survey will inform a number of activities across the Horizons PT network. Areas will of improvement will be reported back to the Passenger Transport Committee in the future.

9. DISCUSSION

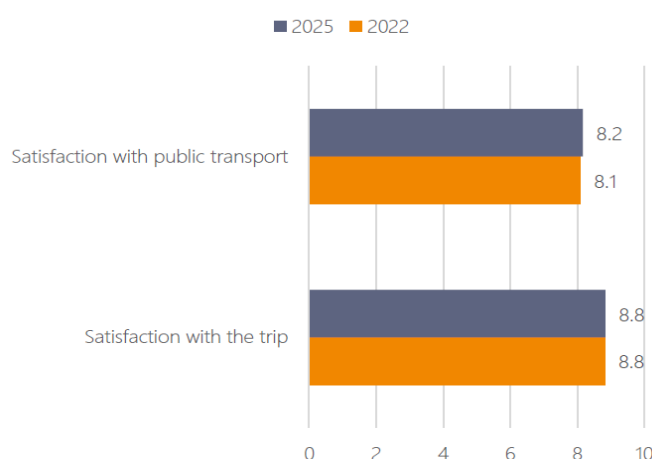
- 9.1. Customer satisfaction with public transport services across the Horizons region remains consistently high, with results showing a stable or improving trend over time.

9.2. The 2025 survey reports:

- Overall public transport satisfaction of 8.2 out of 10, and
- Current trip satisfaction of 8.8 out of 10.

9.3. These results represent a slight improvement from the 2022 survey (8.09 overall satisfaction and 8.83 trip satisfaction), confirming that customer perceptions of service quality have been maintained and marginally strengthened over time.

9.4. A consistent finding across both surveys is that customers rate their individual trip experience more positively than the overall public transport system. This indicates that while operational delivery on-board services is performing well, broader system-level factors (such as network design, information, and reliability) continue to influence overall perceptions.



9.5. The survey confirms that core service delivery is performing strongly, with most service attributes rated highly by customers, and generally exceeding scores of 8.5 out of 10.

9.6. Customers consistently rate the following aspects of the service as key strengths:

- Ease of getting on and off the bus
- Personal security during the journey
- Seat availability
- Driver helpfulness and attitude
- Value for money of fares

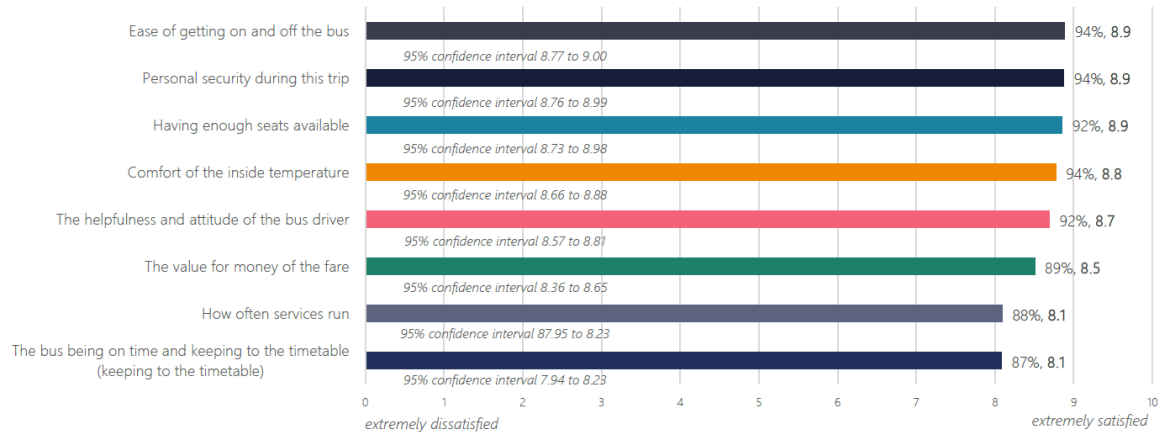
9.7. These strengths reflect positively on:

- the quality and professionalism of service delivery by operators
- the accessibility and usability of services
- the overall comfort and safety of the customer experience

9.8. Importantly, these results are consistent with the 2022 survey, indicating that public transport in the Horizons region has generally maintained a high standard of service in these key areas.

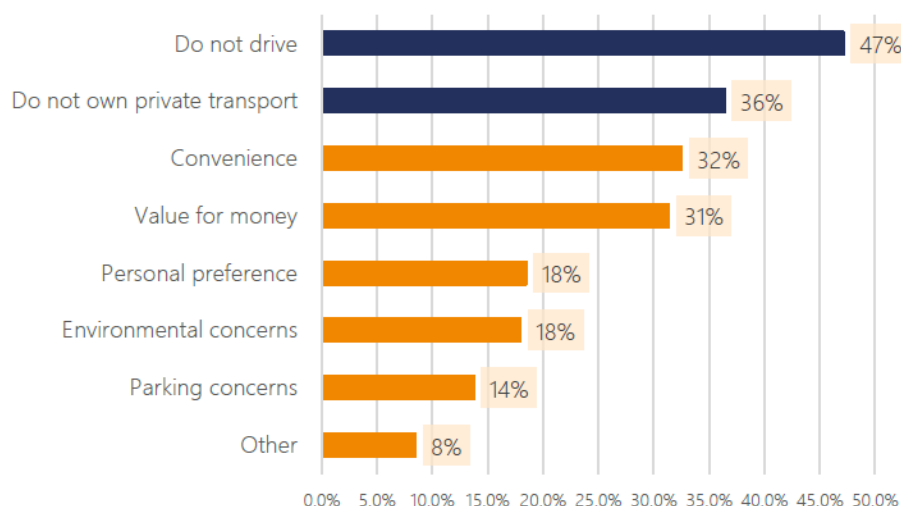
CURRENT BUS TRIP OVERVIEW

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.



- 9.9. The survey highlights that public transport in the region continues to serve a predominantly essential user base.
- 9.10. A total of 69% of respondents indicated that they rely on public transport because they do not have access to a private vehicle or cannot drive, reinforcing the role of public transport as critical infrastructure rather than a discretionary mode of transport. This finding is consistent with the 2022 survey (65%), indicating that the dependency on public transport has remained largely unchanged over time.
- 9.11. Travel purposes are concentrated around essential activities:
- Work (37%)
 - Shopping (37%)
 - Education (35%)
- 9.12. These results highlight that the network is primarily supporting access to employment, education, and essential services and demand is closely linked to daily activity patterns rather than discretionary travel.
- 9.13. The survey also identifies differences across customer groups. Older customers report higher satisfaction levels, particularly in relation to value for money and reliability. Younger users report lower satisfaction levels, consistent with trends identified in previous surveys.

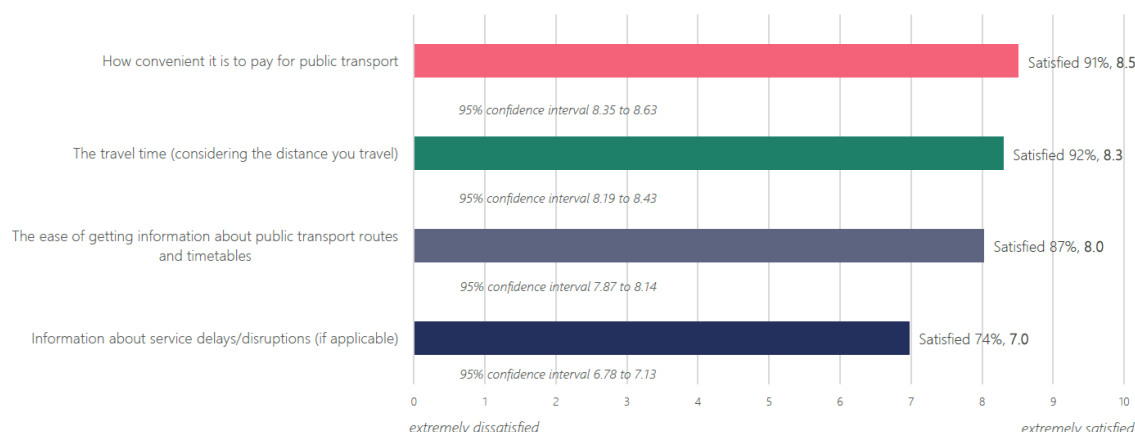
Main reasons for bus travel (multi-choice, prompted)



- 9.14. While overall performance is strong, the survey clearly identifies several consistent and persistent issues that are impacting customer experience. The most significant issue continues to be information about service delays and disruptions, which remains the lowest-rated attribute across the entire survey, with an average score of approximately 7.0. This issue is consistent with the 2022 survey, where delay information also received the lowest score (6.57), indicating that this remains an ongoing gap in service delivery.
- 9.15. Other lower-performing areas include service frequency, timetable reliability, and travel time.

PUBLIC TRANSPORT SYSTEM OVERVIEW

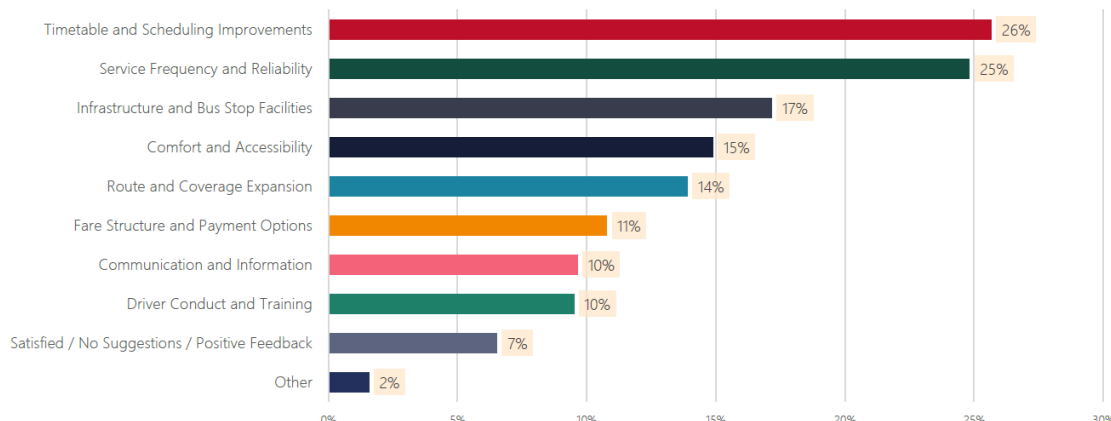
All respondents were asked to rate their experience of public transport in this region over the last three months. Responses were collected on a scale from 0 ('extremely dissatisfied') to 10 ('extremely satisfied'). 'Not applicable' excluded from average scores.



- 9.16. Customers were asked to identify the one key improvement they would like to see, providing a clear view of customer-driven priorities.
- 9.17. The most frequently identified improvements were:
- 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%)
- 9.18. These responses reinforce that customers are primarily focused on operational reliability and consistency, and access to services, both in terms of frequency and coverage.
- 9.19. Overall, the results confirm that improving core service delivery elements (timing, frequency, and reliability) remains the most important focus for improving customer experience.

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%.



- 9.20. The **Net Promoter Score (NPS)** for public transport in the region is +47%, indicating a high level of customer advocacy and willingness to recommend the service to others. This represents an improvement from the 2022 result of +43%, suggesting that overall sentiment toward public transport services has strengthened over time.
- 9.21. The positive NPS result reflects:
- strong customer satisfaction
 - positive perceptions of the service experience
 - potential for continued growth in ridership through word-of-mouth

10. National Customer Experience Insights

- 10.1. In addition to the Horizons customer satisfaction survey, national-level customer research is undertaken by NZTA through the Customer Journey Monitor programme. The public transport deep-dive report provides a comprehensive view of customer experiences, behaviours, and barriers across New Zealand.
- 10.2. The 2024 report can be accessed here:
<https://www.nzta.govt.nz/assets/resources/customer-journey-monitor-public-transport-deep-dive-2024.pdf>
- 10.3. This national research is based on a continuous, nationally representative survey of New Zealanders and provides important context to the Horizons survey by identifying broader trends in customer experience, travel behaviour, and barriers to using public transport.
- 10.4. While the Horizons survey provides detailed regional insight into customer satisfaction, the national research helps to understand how local results compare with wider patterns across the country.
- 10.5. The national research indicates that public transport journeys tend to receive lower experience ratings than other modes such as private vehicles, walking, and cycling. This reflects the additional complexity associated with public transport journeys, including transfers, waiting times, and reliance on network performance.
- 10.6. Key aspects of the public transport experience that perform less well nationally include comfort, ease of journey, and perceptions of personal security. These factors are often influenced by conditions beyond the individual trip itself, such as network design, infrastructure, and the wider travel environment.

- 10.7. The research also shows that customer perceptions of affordability and value for money have declined since 2023, with public transport journeys entering 2025 at lower satisfaction levels than during the period when discounted fares were in place.
- 10.8. In addition, customers increasingly report that public transport journeys take longer than expected. This perception has increased over time and is commonly linked to waiting times, transfers, and network reliability rather than actual journey length.
- 10.9. A consistent finding of the national research is that access to public transport is the primary driver of both usage and experience. This includes first and last mile connections, as well as the ability to access services at the times required.
- 10.10. Availability remains a significant constraint across New Zealand. Public transport accounts for a relatively small proportion of journeys overall, but is disproportionately represented in “missed journeys”, where people were unable to complete trips they would otherwise have taken.
- 10.11. The most common reasons for missed public transport journeys include the lack of a suitable service, journey times being too long, and limited reliability or convenience. These findings highlight the importance of network coverage, frequency, and travel time in enabling access to essential activities.
- 10.12. Nationally, public transport use is concentrated among younger people, lower-income households, and those living in urban areas where services are more readily available.
- 10.13. The research also highlights that some groups experience greater barriers to using public transport, including people with disabilities, Māori, and families with young children. These barriers can relate to physical access, information, service availability, and broader network design.
- 10.14. Public transport journeys are strongly concentrated on work and education travel, with nearly half of journeys linked to these purposes. Demand is also heavily focused on weekdays and peak travel periods, reflecting the role of public transport in supporting commuting and essential activities.
- 10.15. The national findings provide a useful context for interpreting the Horizons survey results, with strong alignment between local and national insights. In particular, both surveys highlight the importance of:
 - service reliability and frequency
 - clear and timely information about delays and disruptions
 - access to services and network coverage
- 10.16. The research confirms that public transport is used predominantly for essential travel and is relied upon by customers with limited alternatives. This reinforces the importance of maintaining reliable and accessible services across the region. The national findings also reinforce that improvements in system-level factors are likely to deliver the greatest improvements in customer experience.

11. TIMELINE / NEXT STEPS

- 11.1. Survey findings will inform:
 - service planning and network reviews
 - improvements to customer information and real-time updates
 - prioritisation of service reliability and frequency
 - infrastructure and accessibility planning

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ANNEXES

A Horizons Public Transport Customer Satisfaction Survey Report 2025



Horizons Regional Council

SIL Research

| Public Transport Passenger Survey

July 2025

 **SIL RESEARCH**
Testing. Insights. Progress.


horizons
REGIONAL COUNCIL

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In this report:



EXECUTIVE SUMMARY	4
METHODOLOGY	6
REASON FOR TRAVEL	10
TRAVEL DESTINATION	11
OVERALL SATISFACTION	12
CURRENT BUS TRIP OVERVIEW	13
PUBLIC TRANSPORT SYSTEM OVERVIEW	14
GETTING ON AND OFF THE BUS	15
NET PROMOTER SCORE	16
PRIORITY ASSESSMENT	17
SUGGESTED IMPROVEMENTS	18

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 Manawātū-Whanganui region.



Horizons Regional Council provides public transport services in the Manawātū-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.

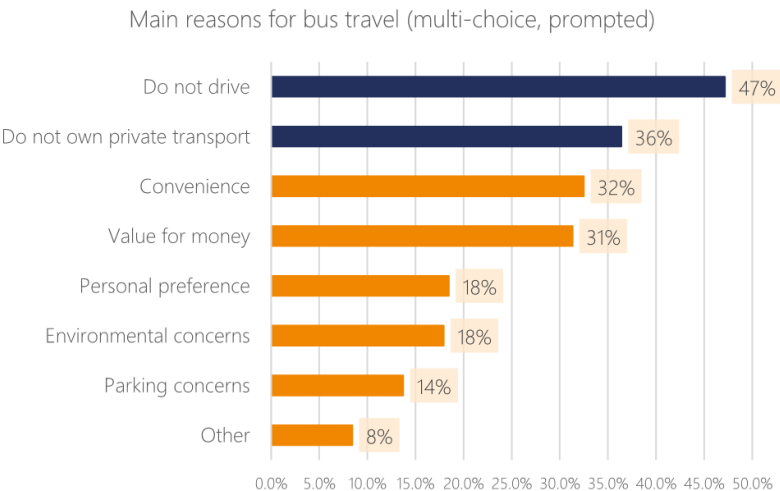
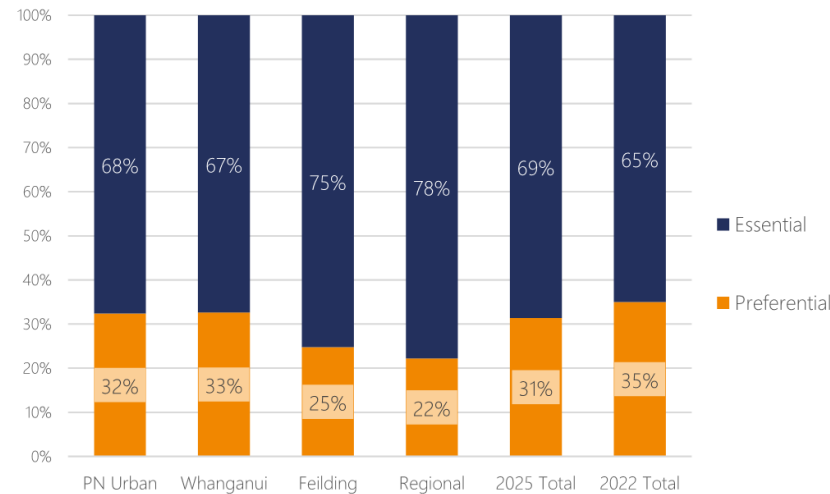
Table 8 Age of respondents

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?"



- 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.

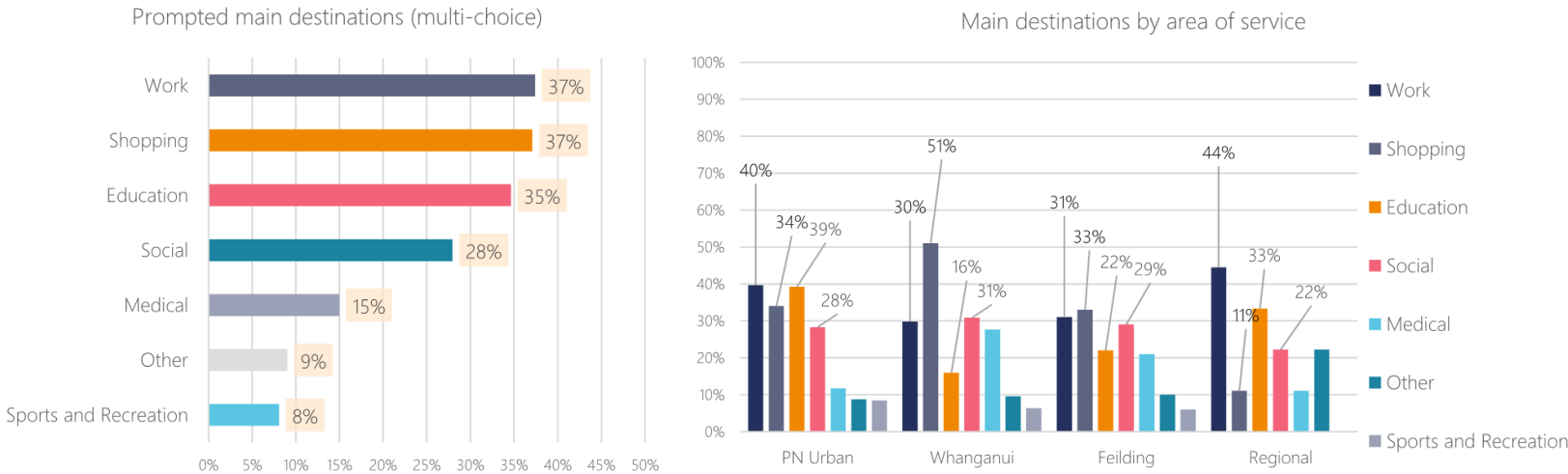
- Younger passengers show distinct patterns, with 15–17 year olds far more likely not to drive (68%) and 18–24 year olds most often lacking private transport (53%). Those aged 65+ are more likely to cite convenience (47%) and value for money (40%).
- Females are more likely than males to report not driving (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?"



- 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.



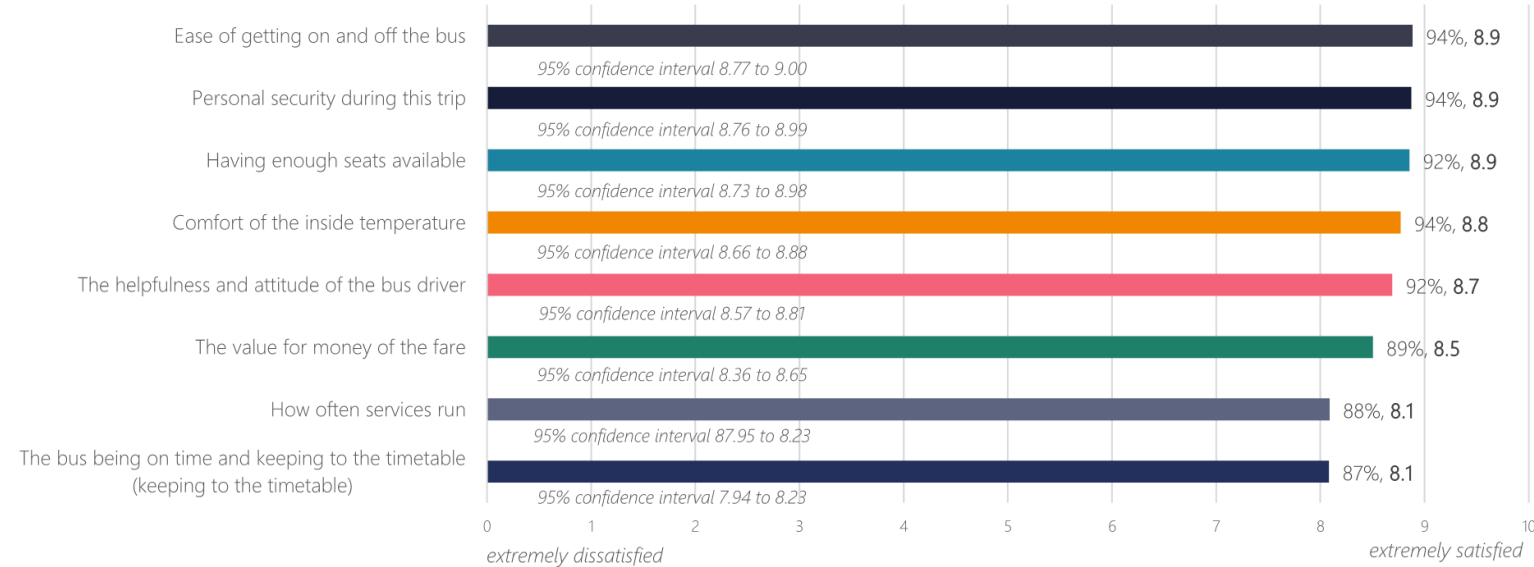
*Small base size (n=9). Interpret with caution.

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.



- 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.

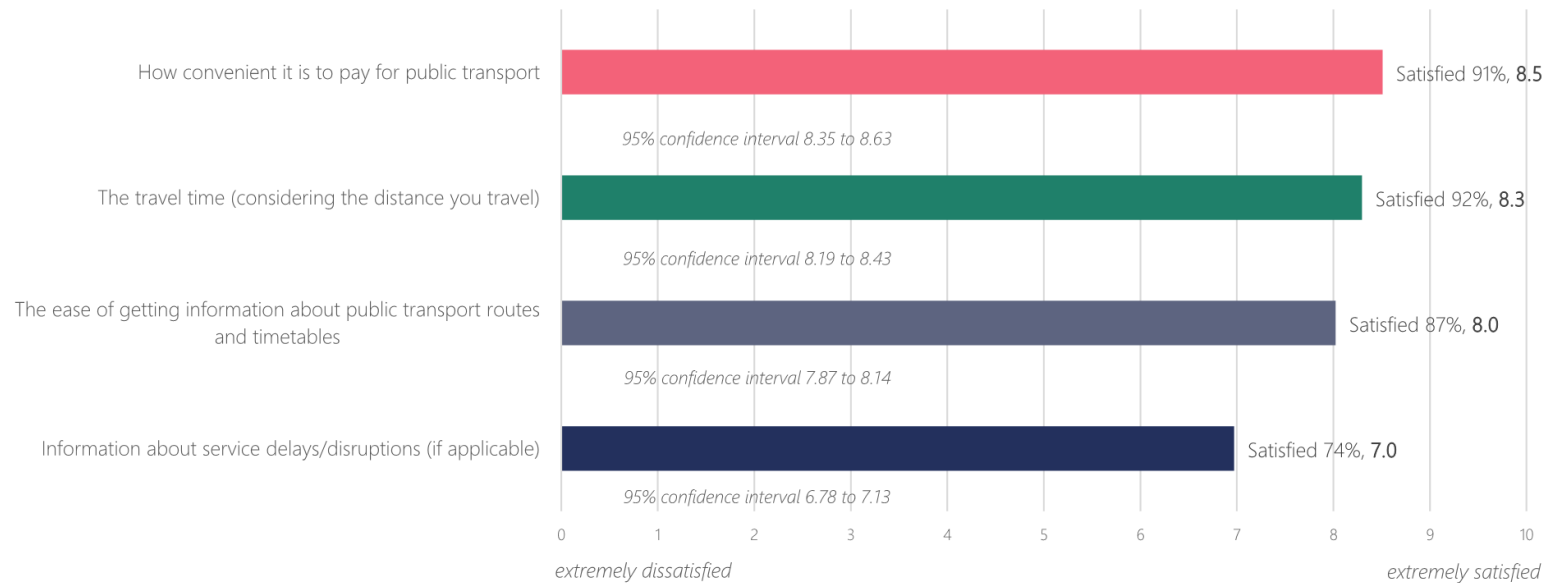
n=779-944

*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.



▪ 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).

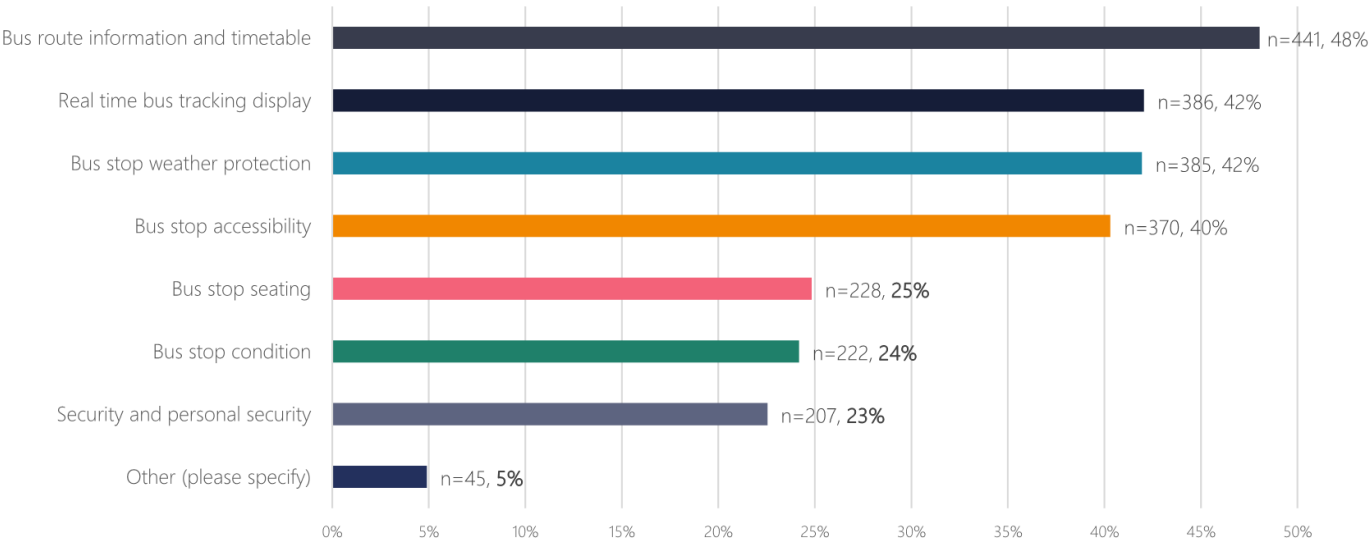
n=727-923

*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.



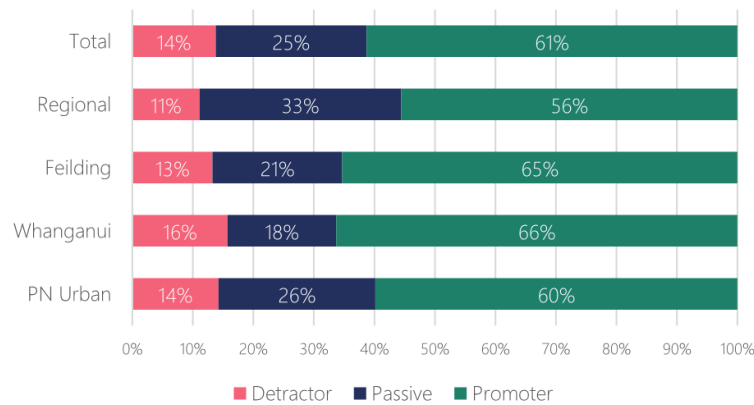
- When it comes to boarding and alighting, passengers place the highest importance on clear bus route information and timetables (48%). Real-time bus tracking displays (42%) and bus stop weather protection (42%) are equally valued, highlighting the need for both accurate service updates and comfort while 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=978

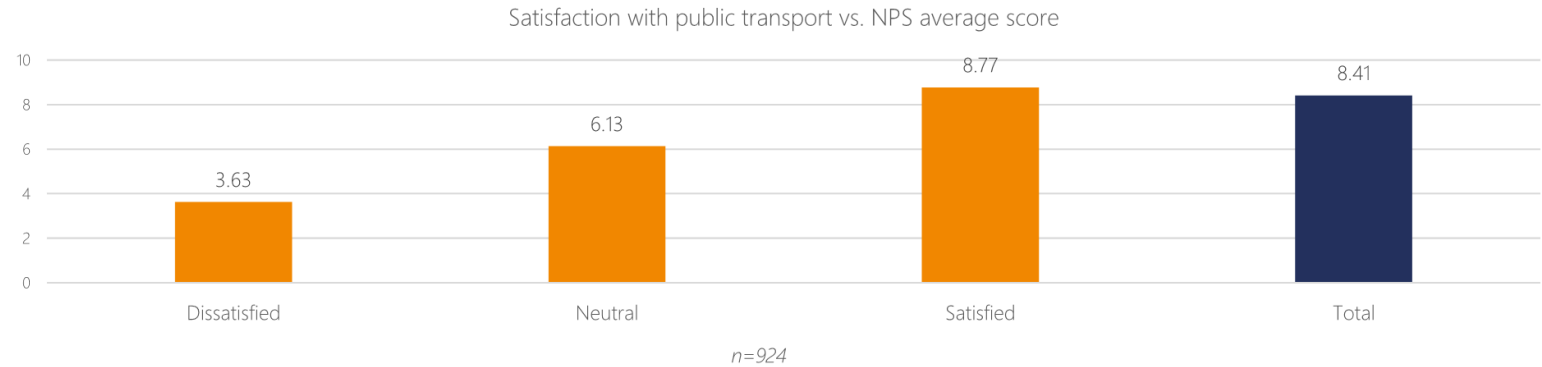
NET PROMOTER SCORE

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



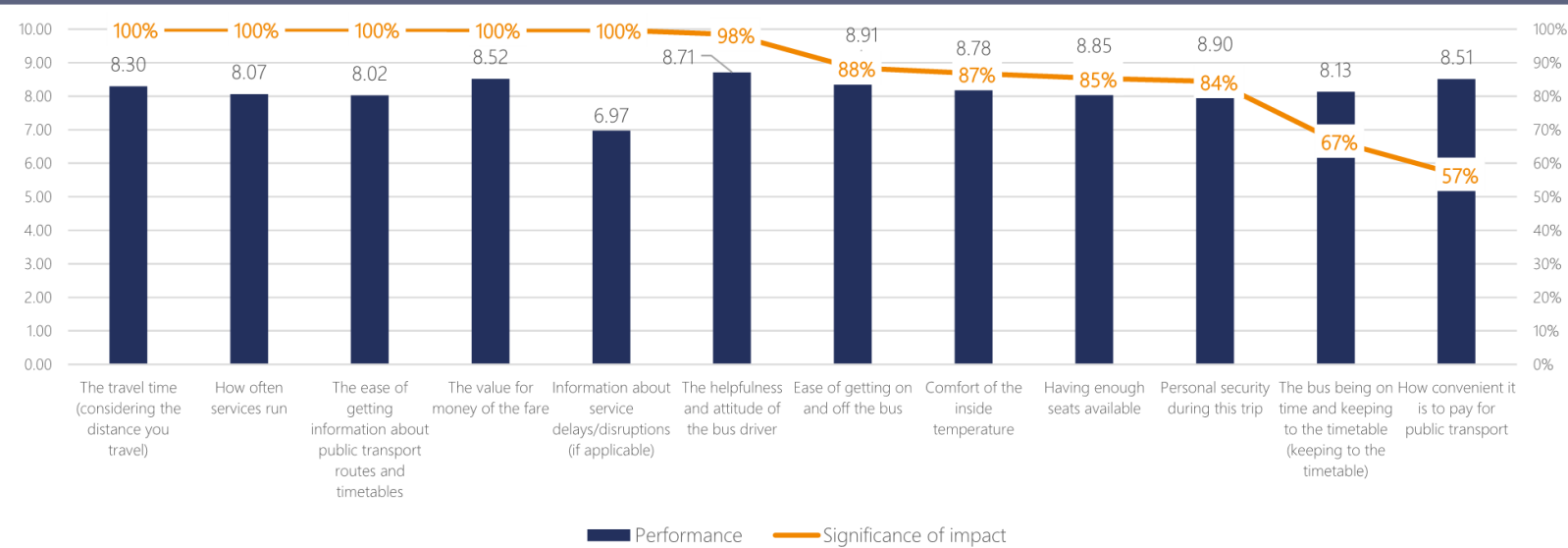
- = +47%

- 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.



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%.

