

BUSCONNECTS RESEARCH 2025

CUSTOMERS' EVALUATION OF PHASE
5A: W-ORBITALS, PHASE 5B: S-
ORBITALS & PHASE 6A: N2-ORBITAL
& E-SPINE

NTA

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BusConnects Research 2025 |
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New Bus Routes

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1. INTRODUCTION & KEY RESULTS



Research Objectives & Methodological Approach

Background

Since 2021, TFI has been rolling out the new Dublin City bus network on a phased basis.

This research was undertaken to evaluate three phases of this plan. Namely, Phase 5a: W-Orbitals, Phase 5b: S-Orbitals and Phase 6a: N2-Orbital and E-spine.

Objectives

- The key objectives of this research are:
- Assess users' satisfaction with the new routes;
 - Capture users' evaluation of the new bus routes in comparison to the previous;
 - Assess the impact of the new bus routes on public transport usage.

Methodology

Face-to-face interviews conducted on board and at the bus stops using tablets. Interviews were spread across day of week and time of day. 82% of interviews conducted from Monday to Friday. Interviews were spread across the day from 7am to 8pm

The fieldwork was conducted from Monday 18th August to Sunday 14th September 2025.

Sample

2,559 interviews were completed with the following spread across the phases:

	N	MOE C.L. 95% +/-
Phase 5a: W-Orbitals	532	4
Phase 5b: S-Orbitals	772	4
Phase 6a: N2-Orbitals & E-Spine	1,255	3
TOTAL	2,559	2

Interviews Completed by Bus Routes

Number of interviews spread by bus routes within each phase. Ball park quotas for interviews per bus was set relative to the frequency of each bus.

Launched in 2023

Phase 5a: W-Orbitals	N
W4	260
W6	274
Total	532

Launched in 2023

Phase 5b: S-Orbitals	N
L25	60
L55	63
S2	121
S4	128
S6	120
S8	120
W2	60
74	99
Total	772

Launched in 2025

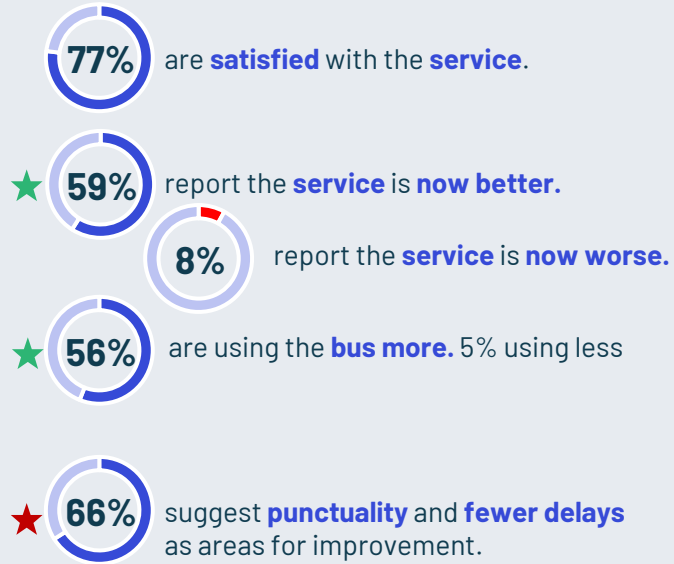
Phase 6a: N2- Orbitals & E-Spine	N
E1	135
E2	150
L1	81
L2	91
L3	75
L12	90
L14	90
L15	60
L26	90
L27	90
N2	91
X1	41
X2	51
19	120
Total	1,255

BusConnects Research 2025: Key Results

Positive results for W-Orbitals, S-Orbitals, N2-Orbitals & E-Spine. Satisfaction levels are very high at 77% satisfied or more. For all routes the proportion who say the routes have improved, outweighs significantly the proportion who say they have disimproved and just one in twenty across routes say they use less now . Improved punctuality and fewer delays are most frequent requests for improvement across all the three phases.

W-Orbitals

W-Orbitals are evidenced as having the largest impact on improved service ratings and in encouraging more frequent use of the bus. Reliability emerges as weakness of the service which may need attention to improve the service.



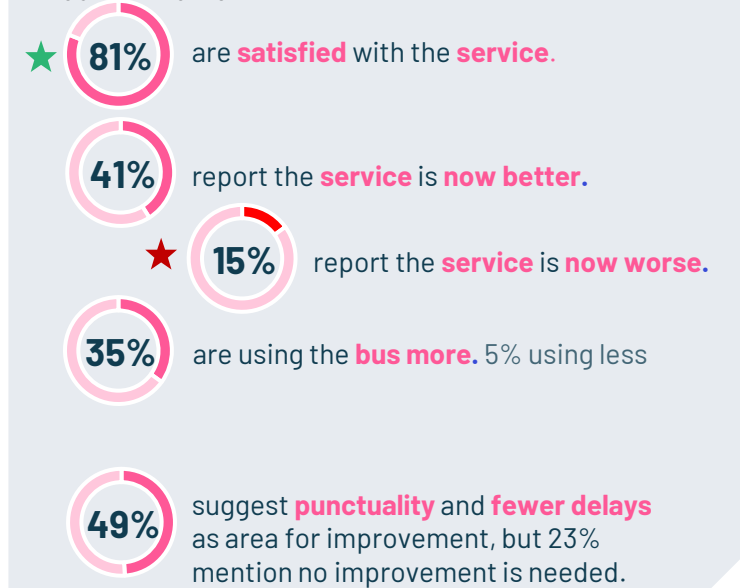
S-Orbitals

Positive satisfaction levels with **S-Orbitals** broadly in line with network average. More than two in five say the route is better, although more than one in ten disagree. Almost half are using the route more. Fewer delays and more buses (at peak time and outside the peak) could improve.



N2-Orbital & E-Spine

Satisfaction is marginally higher with **N2-Orbital & E-Spine** and almost 1 in 4 users feel no improvements are needed. Almost a third of passengers claim to be using the route more but worth noting 15% say the route is worse .



Routes are dominated by working commuters, N2-Orbital & E-Spine are more likely to be used for shopping and leisure too.

Base: Phase 5a: W-Orbitals N 532, Phase 5b: S-Orbitals N 772, Phase 6a: N2-Orbital & E-Spine N 1,255

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★ Marks the best evaluation across the phases

★ Marks the worse evaluation across the phases

Summary: Review of All BusConnects Phases Tested

While passenger satisfaction is highest with the H-Spine, the W-Orbitals receive the most endorsements as improved and for encouraging increased usage. Punctuality is identified as the primary area for improvement across all phases, particularly for workers.

Tested in 2024					Tested in 2025			
	Phase					Phase		
	Phase 1: H-Spine	Phase 2: C-Spine	Phase 3: N-Orbitals	Phase 4: G-Spine		Phase 5a: W-Orbitals	Phase 5b: S-Orbitals	Phase 6a: N2-Orbital & E-Spine*
	444	715	330	416		532	772	1,255
	%	%	%	%		%	%	%
Satisfaction with the service (Net Satisfied)	89 ★	73	84	76	Satisfaction with the service (Net Satisfied)	77	77	81
Evaluation in comparison to previous routes (Better Now)	47	52	58	43	Evaluation in comparison to previous routes (Better Now)	59 ★	44	41
Impact on bus usage (Using Bus More)	40	33	35	26	Impact on bus usage (Using Bus More)	56 ★	47	35
Top area for improvement: Improve punctuality/fewer delays	41	56	35	42	Top area for improvement: Improve punctuality/fewer delays	66 ★	57	49
Used for Work	54	69	50	66	Used for Work	64	67	64

*More likely to be used for
Leisure, Sport and Shopping
than S-Orbitals and W-Orbitals

- ★ Marks the best evaluation
- ★ Marks the most frequently suggested area for improvement

Route 19 Review

Satisfaction with route 19 is positive with little to no negativity coming through. 46% report the service is better now.

Overall Satisfaction	Total %	Phase 6a %	Route 19 %
Base:	2,559	1,255	120
Very satisfied	38	38	42
Fairly satisfied	41	43	50
Neither satisfied nor dissatisfied	12	11	7
Fairly dissatisfied	7	6	1
Very dissatisfied	3	2	1
Any Satisfied	79	81	92

Evaluation of the service	Total %	Phase 6a %	Route 19 %
Base:	1,855	1,012	93
Better now	46	42	46
About the same	38	41	42
Worse than it was	13	15	11
I wasn't using the service before	4	3	1

Impact on bus usage	Total %	Phase 6a %	Route 19 %
Base:	1,855	1,012	93
Net started using/using it more	42	35	33

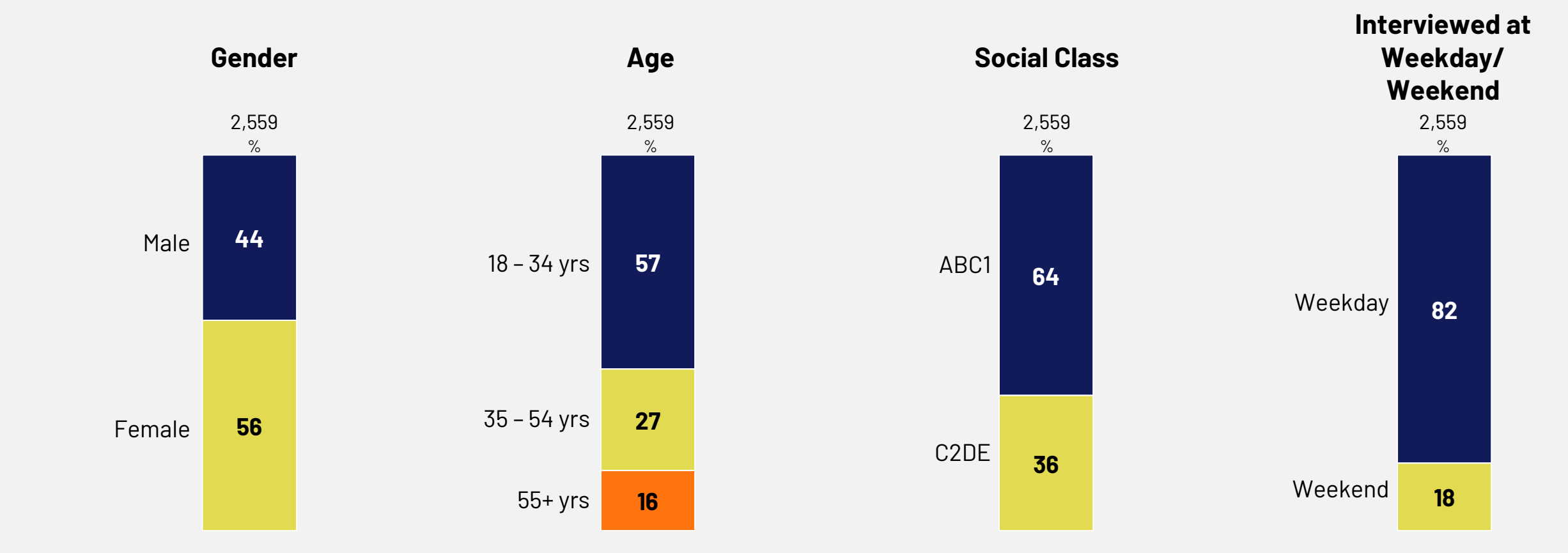
Suggested Improvements	Total %	Phase 6a %	Route 19 %
Base:	2,559	1,255	120
Improve punctuality	46	40	36
More buses at peak times	30	28	25
Fewer delays	28	25	23
More buses outside peak times (nights, evenings)	24	23	18
Improve accuracy of Real Time signs	21	23	27
More/improved shelters	8	9	3
More security	7	8	10
Improve cleanliness	7	6	13
Improve overcrowding	6	8	12
Improve access for disabled/elderly people	3	4	3
No improvement necessary	19	23	23

2. USAGE OF THE NEW BUS ROUTES



Profile of Bus Users

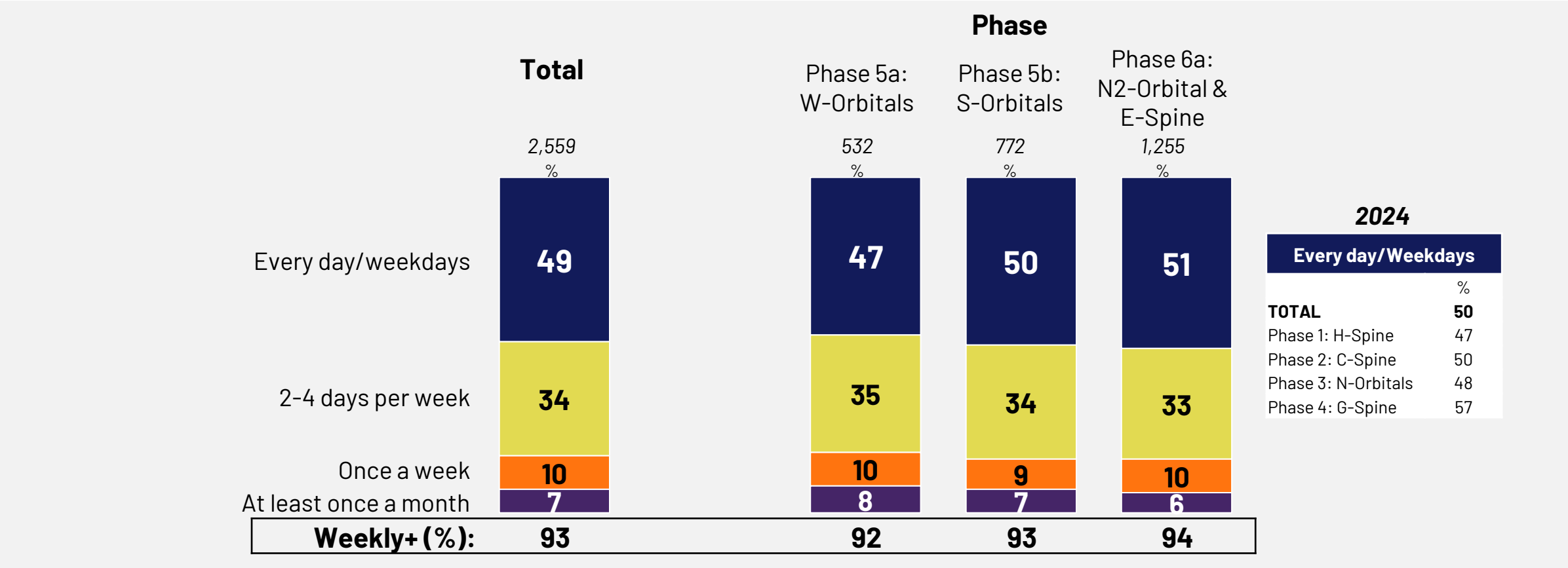
Profile of users is skewed towards young adults with 3 in 5 users under 35 years of age.



Base: All Bus Users– 2,559

Frequency of Usage

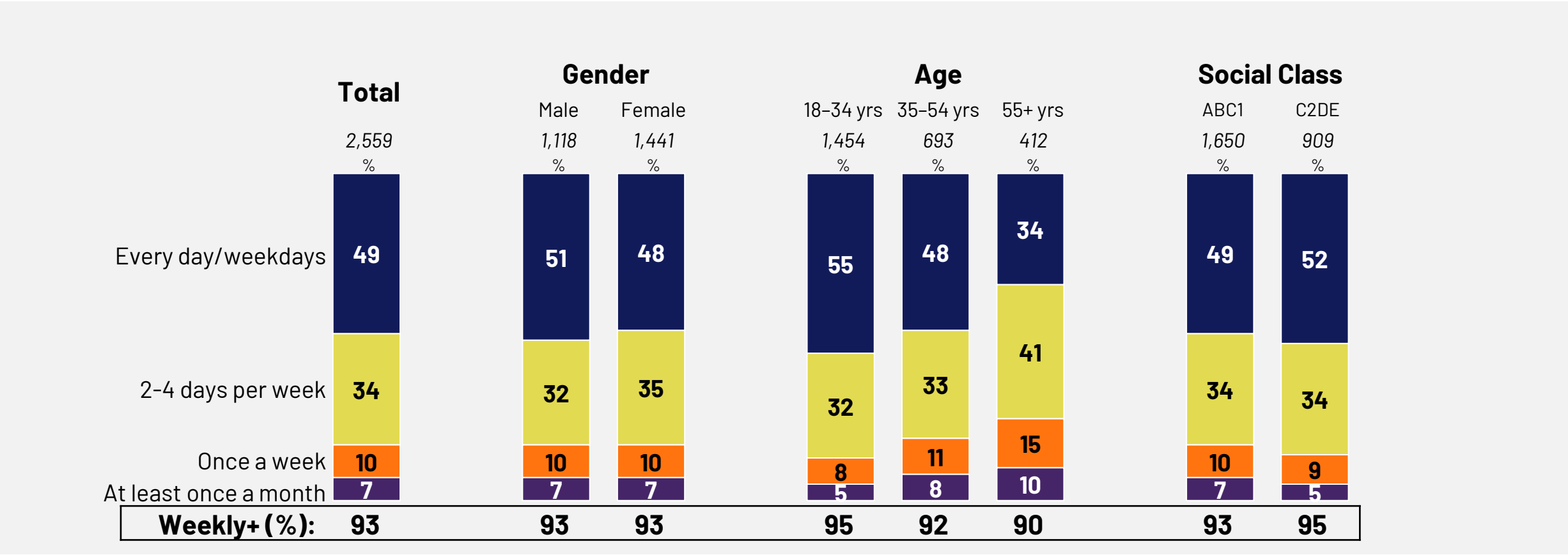
High frequency of usage with about half using the bus every day/weekdays. This is just marginally lower for W-Orbitals.



Q.1 In general, how often do you travel on these bus routes?
Base: All Bus Users – 2,559

Frequency of Usage across Demographic Groups

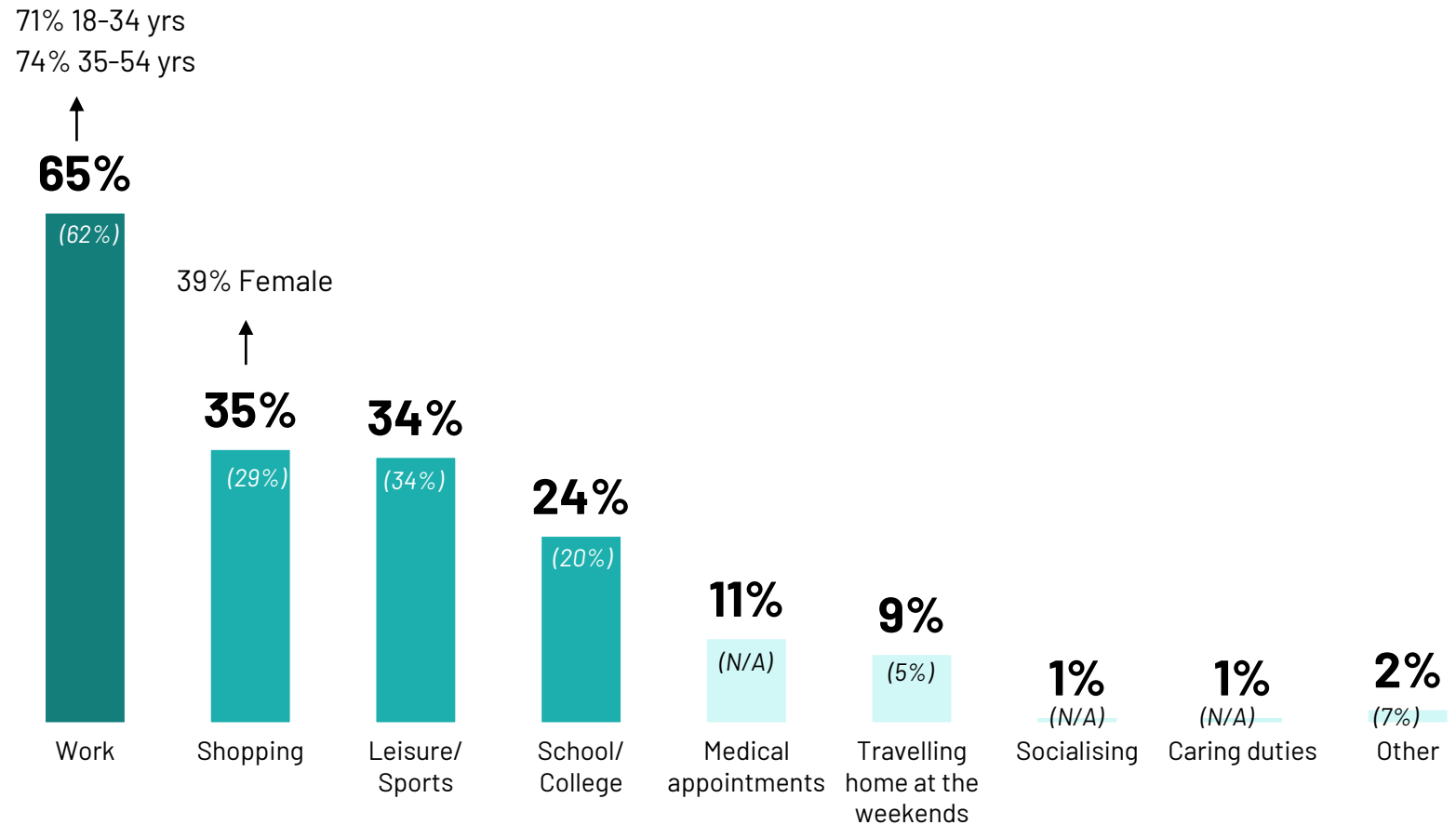
Younger adults more likely to be frequent users.



Q.1 In general, how often do you travel on these bus routes?
Base: All Bus Users – 2,559

Reason for Bus Usage

Work is the main reason for using the bus, followed by shopping, leisure and sports.



Q.6 What do you use the bus for?

MULTICODE

Base: All Bus Users – 2,559

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Reason for Bus Usage by Phases

Most passengers are commuting for work , although N2-Orbital & E-Spine has also significant numbers of shopping, leisure and sports travellers .

	TOTAL	Phase		
		Phase 5a: W-Orbitals	Phase 5b: S-Orbitals	Phase 6a: N2-Orbital & E-Spine
	2,559	532	772	1,255
	%	%	%	%
Work	65	64	67	64
Shopping	35	29	31	39
Leisure/Sports	34	32	28	40
School/College	24	23	22	25
Medical appointments	11	11	10	12
Travelling home at the weekends	9	8	8	10
Socialising	1	1	1	2
Caring duties	1	0	1	1
Other	2	0	1	2

2024	
Work	
	%
TOTAL	62
Phase 1: H-Spine	54
Phase 2: C-Spine	69
Phase 3: N-Orbitals	50
Phase 4: G-Spine	66

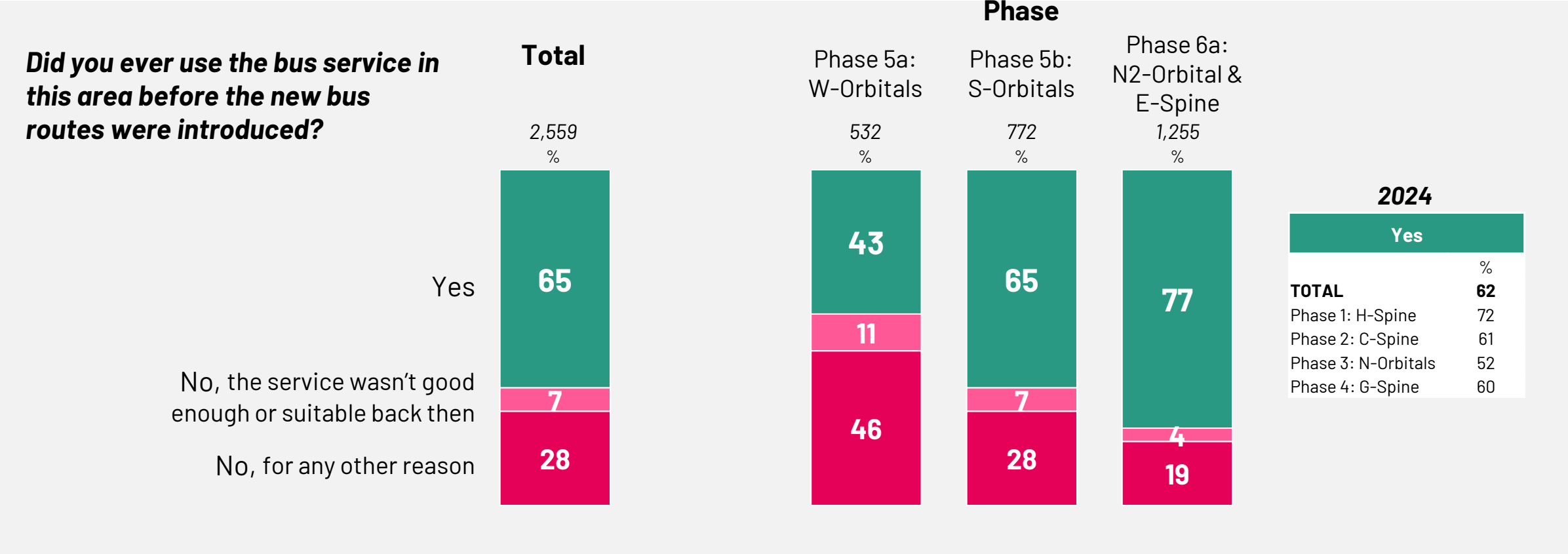
Q.6 What do you use the bus for?
MULTICODE
Base: All Bus Users – 2,559
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= Significantly higher



Prior Use of Bus Service in the Area (Before Networking Redesign)

2 in 3 used the bus service in the area even before the bus routes were altered and renumbered. Not surprisingly, this is lower for W-Orbitals because this is a new route.

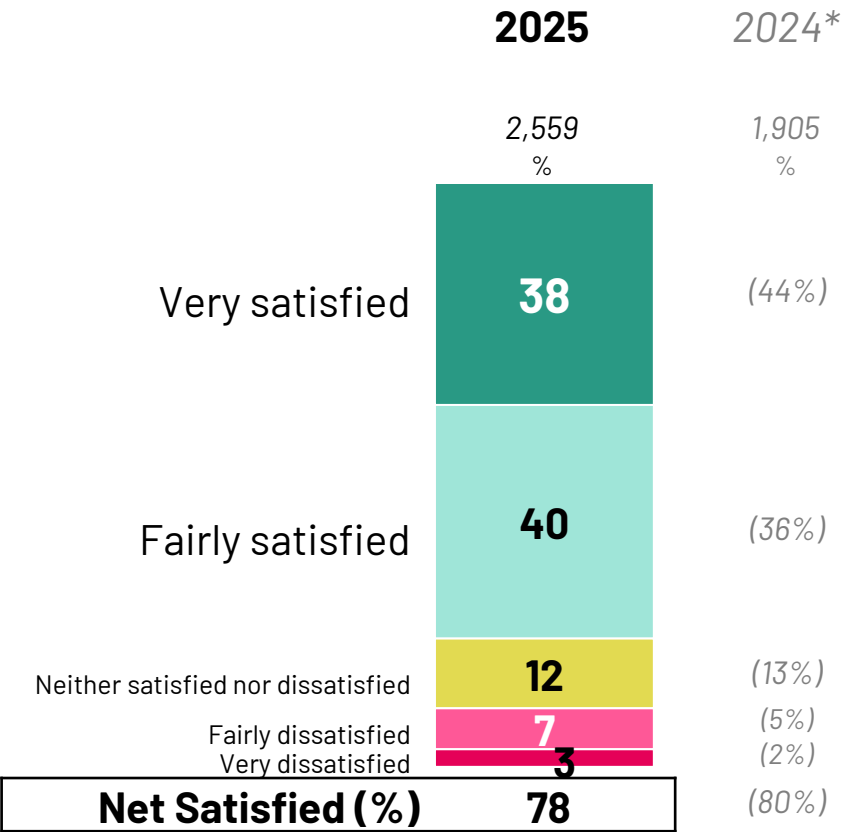


Q.3 Did you ever use the bus service in this area, before the bus routes were altered and renumbered?
Q.3.5a Did you ever use the bus service in this area before the new bus routes were introduced?
Base: All Bus Users – 2,559

3. EVALUATION OF THE NEW BUS ROUTES

Overall Satisfaction with the New Bus Routes

Satisfaction is high with almost 8 in 10 satisfied with the new bus routes overall (38% are 'very' satisfied).



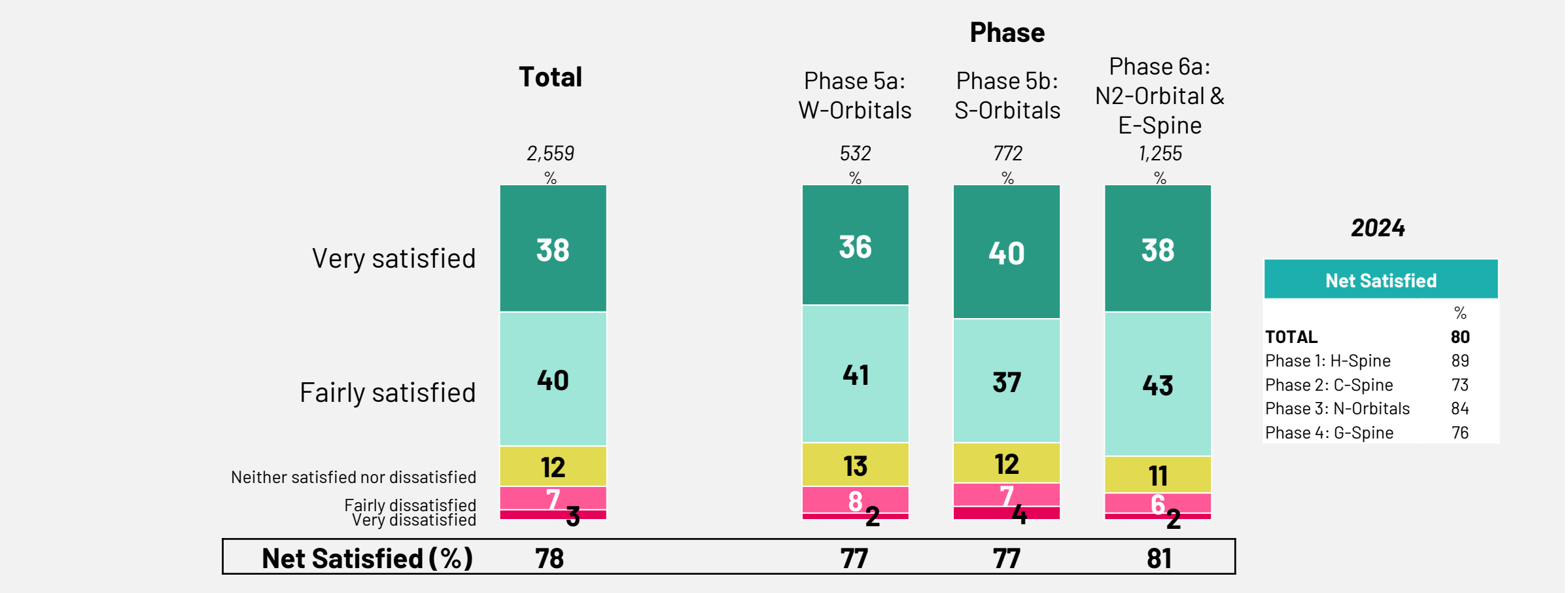
Q.2 Overall, how satisfied or dissatisfied are you with the service from these bus routes?

Base: All Bus Users- 2,559

* Total H-Spine, C-Spine, 3-Orbitals and G-Spine tested in 2024

Overall Satisfaction with the New Bus Routes

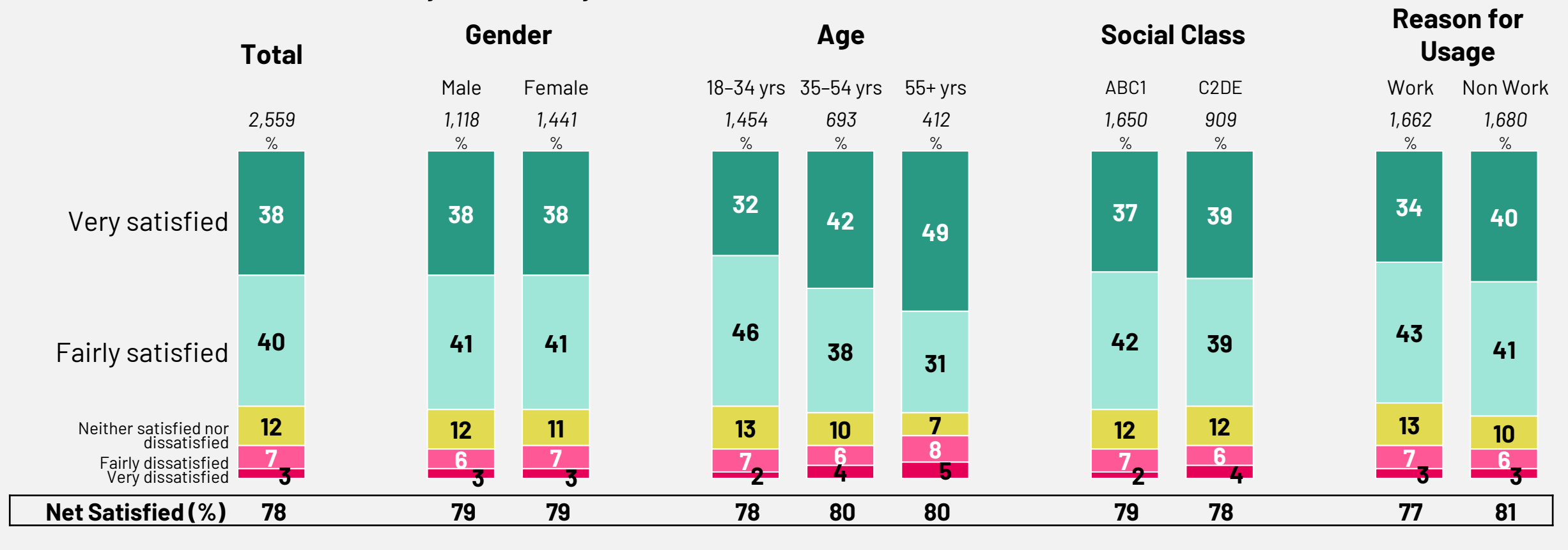
Overall satisfaction levels are high and similar across the three Phases, just marginally higher for N2-Orbital & E-Spine. Satisfaction levels are in line with C-Spine and G-Spine, but lower than satisfaction with H-Spine and N-Orbitals tested last year.



Q.2 Overall, how satisfied or dissatisfied are you with the service from these bus routes?
Base: All Bus Users– 2,559

Overall Satisfaction with the New Bus Routes across Demographic Groups

Overall satisfaction is high across all the socio-demographic groups, but adults under 35 years and commuters are the least likely to be 'very' satisfied.

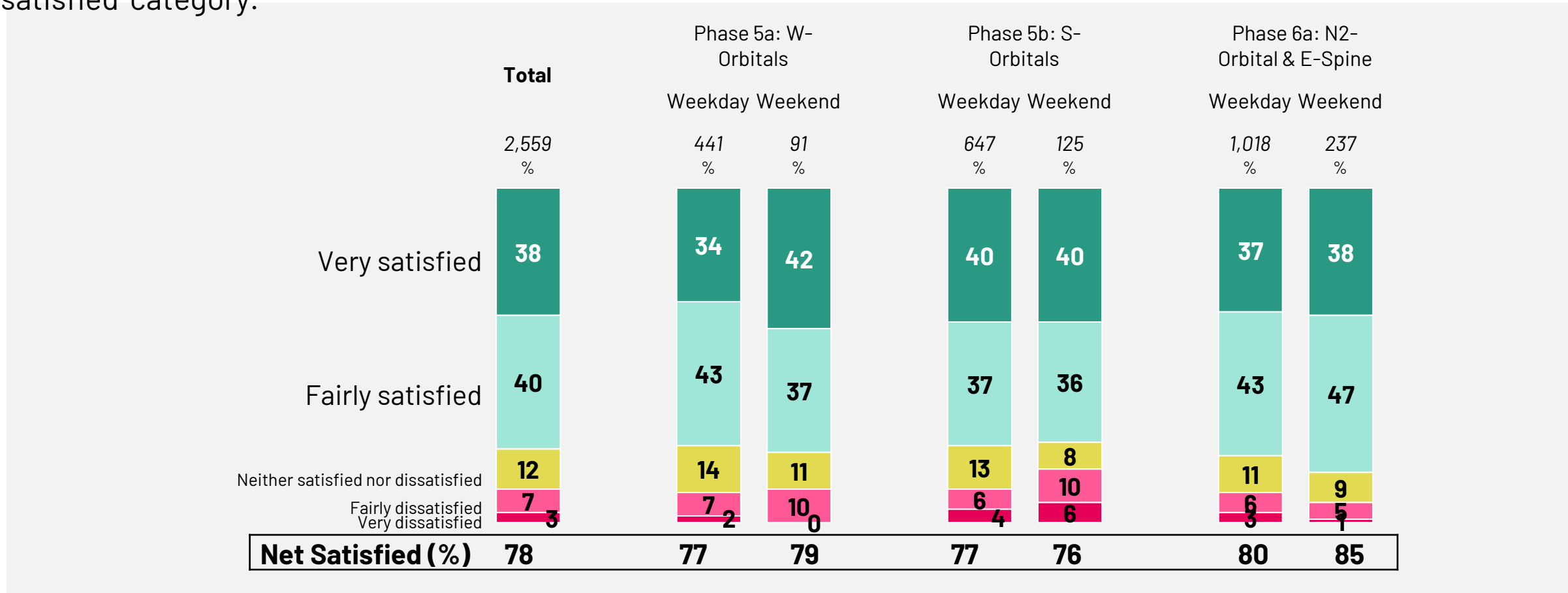


Q.2 Overall, how satisfied or dissatisfied are you with the service from these bus routes?

Base: All Bus Users- 2,559

Overall Satisfaction by Phase and Time of the Week

Overall satisfaction tends to be lower among those interviewed during Weekdays for W-Orbitals and N2-Orbitals & E-Spine likely evidencing pressure of commuting. Difference is relatively large for W-Orbitals in the 'very satisfied' category.



Q.2 Overall, how satisfied or dissatisfied are you with the service from these bus routes?

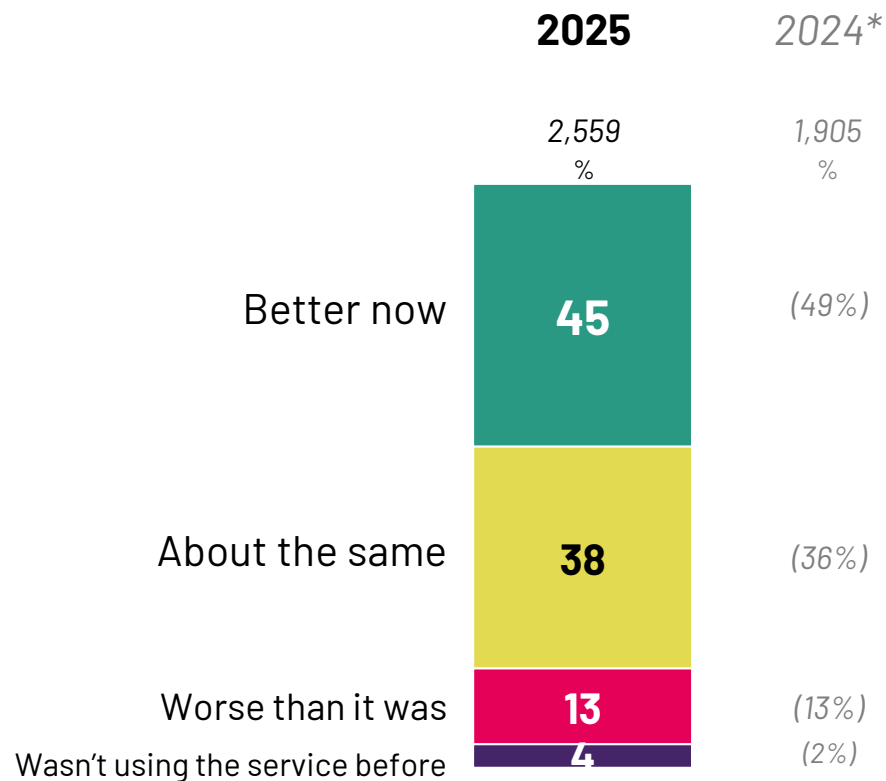
Base: All Bus Users- 2,559

Evaluation of the Service

(in comparison to before the introduction of the new bus route)

Nearly half say the service is better now and only 13 percent say worse.

Is the service better or worse now?



Q.4 In your opinion, since the bus routes were altered and renumbered, is service better or worse now?

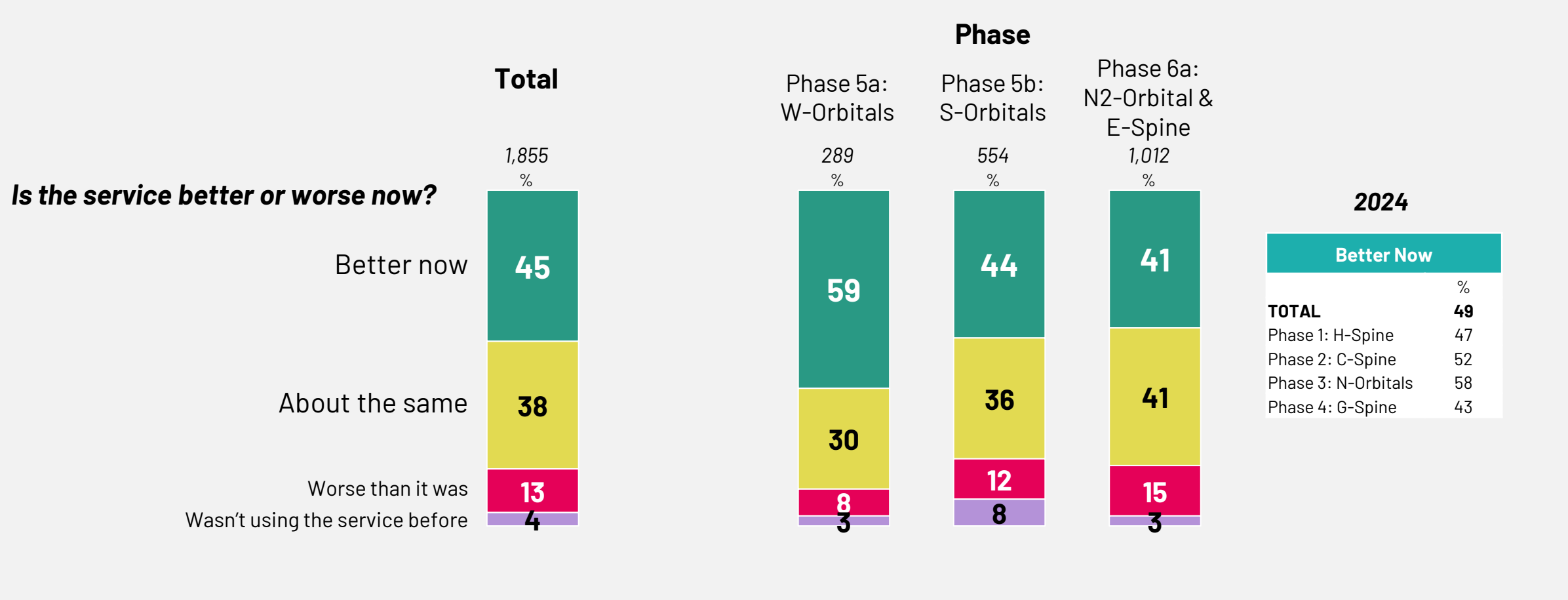
Q.4.5a In your opinion, since the new bus routes were introduced, is the service better now, worse or about the same as it was before ?

Base: All who were using the service before or didn't use because it wasn't good enough - 1,289

*Total H-Spine, C-Spine, 3-Orbitals
and G-Spine tested in 2024

Evaluation in Comparison to the Previous Routes

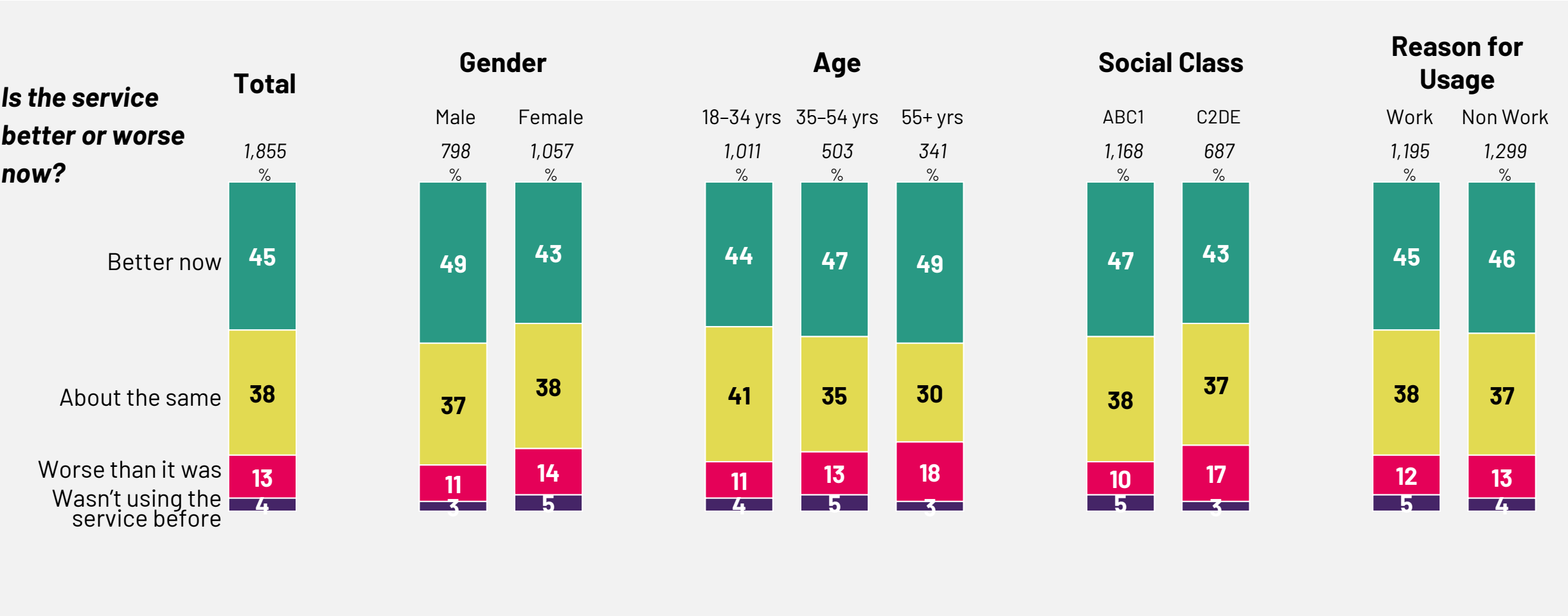
On balance the view from passengers is that the service has improved, especially for W-Orbitals. Nevertheless, a significant minority (8% to 15% across routes) report the service is worse.



Q.4 In your opinion, since the bus routes were altered and renumbered, is service better or worse now?
Q.4.5a In your opinion, since the new bus routes were introduced, is the service better now, worse or about the same as it was before ?
Base: All who were using the service before or didn't use because it wasn't suitable- 1,855

Evaluation in Comparison to Previous Routes

Older passengers and blue collar most likely to report the service is worse.



Q.4 In your opinion, since the bus routes were altered and renumbered, is service better or worse now?
Q.4.5a In your opinion, since the new bus routes were introduced, is the service better now, worse or about the same as it was before ?
Base: All who were using the service before or didn't use because it wasn't suitable- 1,855

Profile of Phase 6a Users by Evaluation of the Service

Those who report that the service is worse than it was are disproportionately blue collars and marginally more likely to be women and older adults.

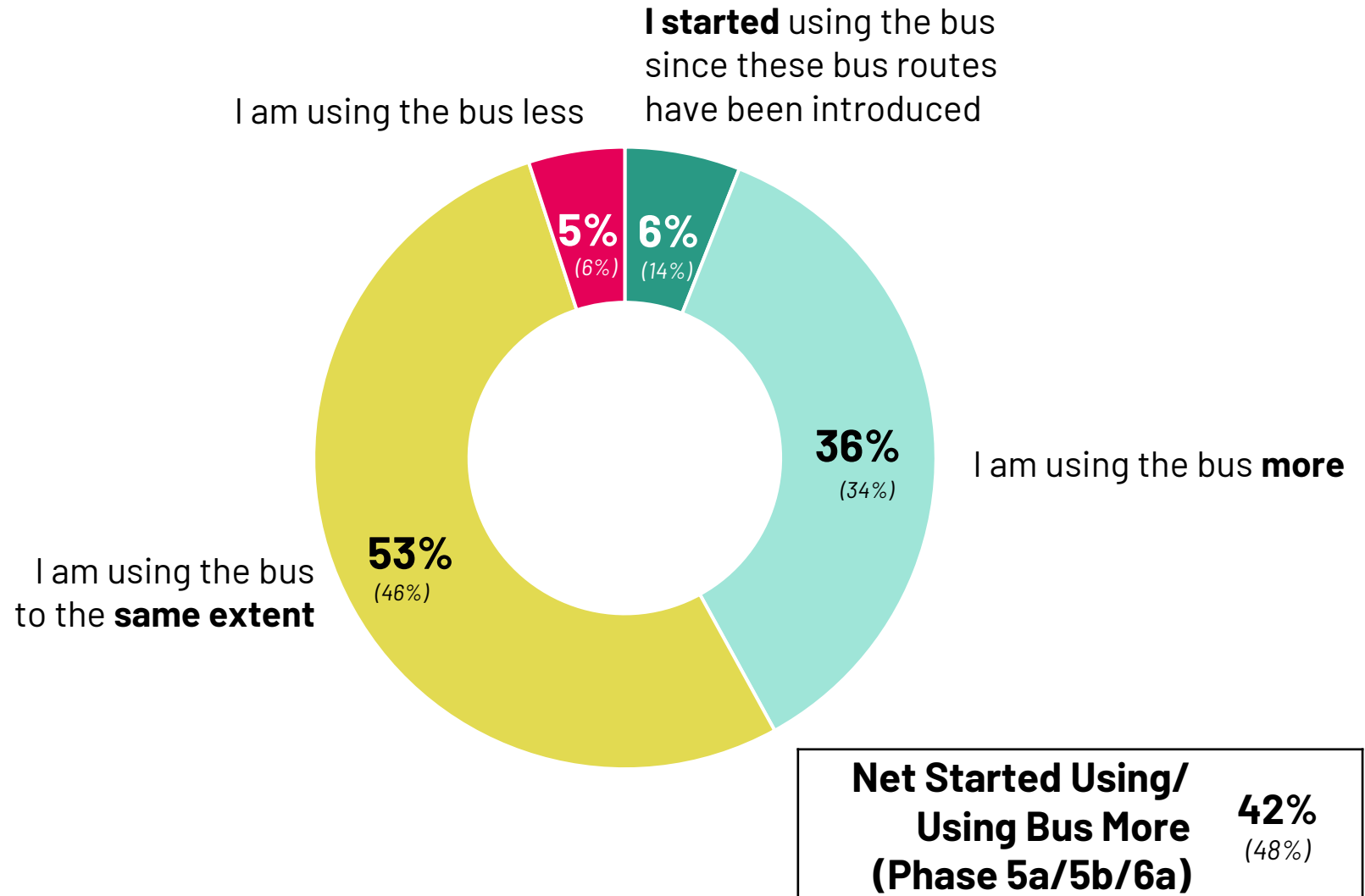
Phase 6a Sample Profile		Evaluation of the service		
		Better now	About the same	Worse than it was
		1,255	429	410
		%	%	%
Gender	Male	42	44	39
	Female	58	56	61
Age	18 – 34 yrs	54	53	46
	35 – 54 yrs	29	28	31
	55+ yrs	17	20	24
Social Class	ABC1	54	55	37
	C2DE	46	45	63
Reason for Usage	Work	64	63	61
	Non-work	71	76	76

Q.4 In your opinion, since the bus routes were altered and renumbered, is service better or worse now?
Q.4.5a In your opinion, since the new bus routes were introduced, is the service better now, worse or about the same as it was before ?
Base: All who were using the service before or didn't use because it wasn't suitable

 = Significantly higher

Bus Usage since the introduction of the New Bus Routes

42% have started using the bus or are using the bus more since the new bus routes were introduced.



Q.5 Since the bus routes have been altered and renumbered, are you using the bus more, less or about the same as before?

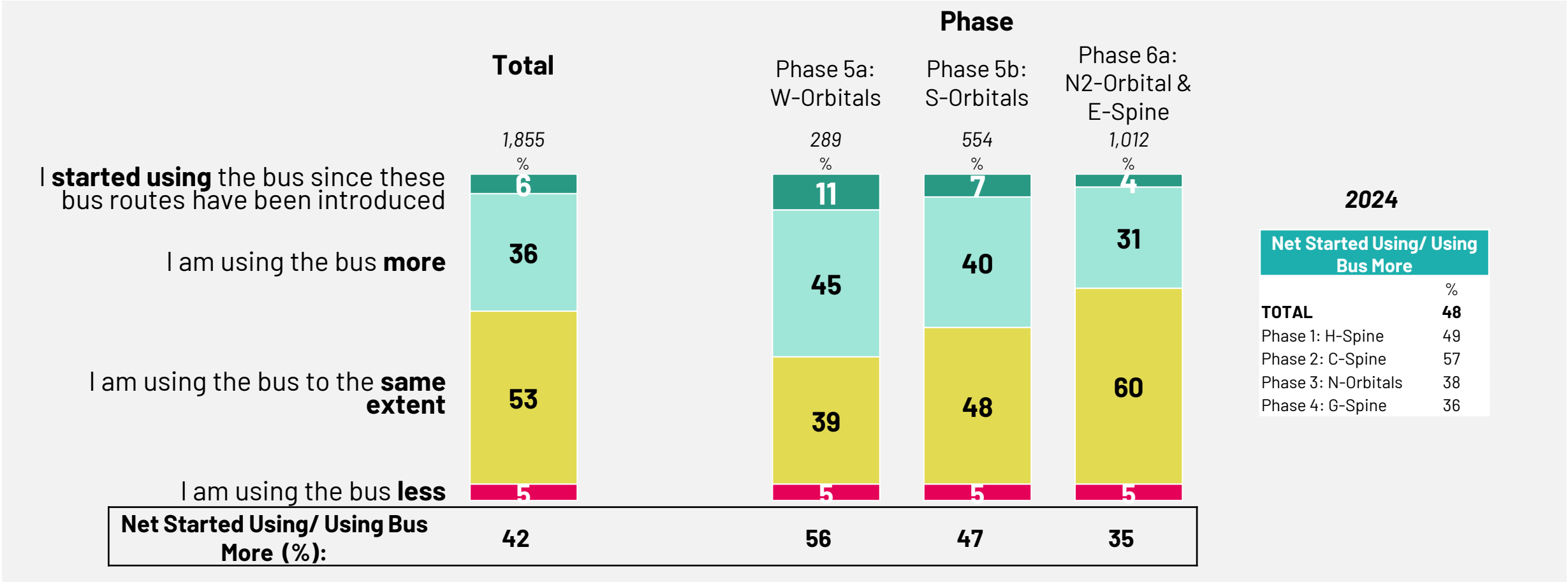
Q.5.5a Since the new bus routes have been introduced, are you using the bus more, less or about the same as before?

Base: All who were using the service before or didn't use because it wasn't suitable- 1,855

() = Total H-Spine, C-Spine, 3-Orbitals and G-Spine tested in 2024

Bus Usage since the Introduction of the New Bus Routes

Almost 3 in 5 in W-Orbitals have started using the bus or are using the bus more since the new bus routes were introduced. Frequency of usage less impacted in N2-Orbital & E-Spine area.



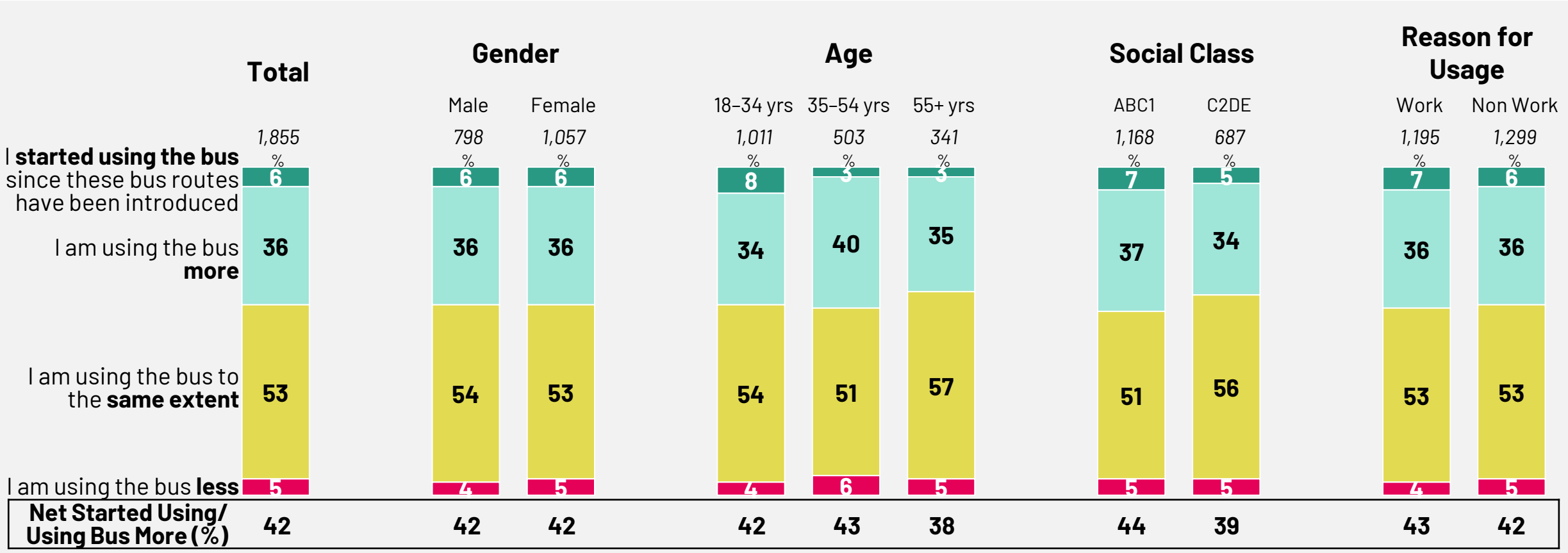
Q.5 Since the bus routes have been altered and renumbered, are you using the bus more, less or about the same as before?

Q.5.5a Since the new bus routes have been introduced, are you using the bus more, less or about the same as before?

Base: All who were using the service before or didn't use because it wasn't suitable- 1,855

Bus Usage since the Introduction of the New Bus Routes

Adults under 55 years and ABC1s are marginally more likely to have started using or use the bus more in comparison to their counterparts.

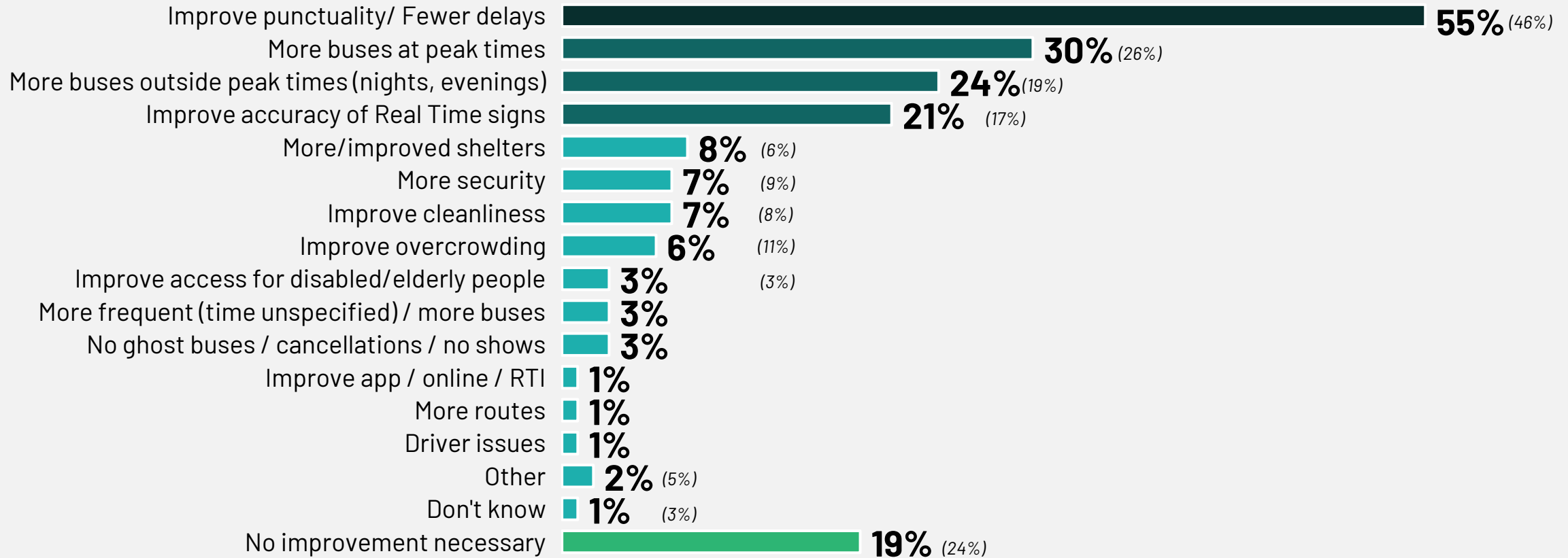


Q.5 Since the bus routes have been altered and renumbered, are you using the bus more, less or about the same as before?
Q.5.5a Since the new bus routes have been introduced, are you using the bus more, less or about the same as before?
Base: All who were using the service before or didn't use because it wasn't suitable- 1,855

4. SUGGESTIONS FOR IMPROVEMENTS

Suggested Areas for Improvements

Improved punctuality is the key area for improvement. More buses and more accurate real-time information are also frequently mentioned.



Q.7 Do you have any suggested areas for improvement for these altered and renumbered bus routes?

Base: All Bus Users – 2,559

() = Overall satisfaction with the first four phases:
H-Spine, C-Spine, N-Orbitals and G-Spine.



Suggested Areas for Improvements by Phases

Lack of punctuality and delays are reported as an issue especially for W-Orbitals but also S-Orbitals. Capacity also mentioned as an issue for S-Orbitals. Positive result for N2-Orbital & E-Spine with almost 1 in 4 who reporting no improvements needed.

	TOTAL	Phase		
		Phase 5a: W-Orbitals	Phase 5b: S-Orbitals	Phase 6a: N2-Orbital & E-Spine
	2,559	532	772	1,255
	%	%	%	%
Improve punctuality / Fewer delays	55	66	57	49
More buses at peak times	30	28	33	28
More buses outside peak times (nights, evenings)	24	19	28	23
Improve accuracy of Real Time signs	21	17	22	23
More/improved shelters	8	6	7	9
More security	7	7	7	8
Improve cleanliness	7	7	10	6
Improve overcrowding	6	2	7	8
Improve access for disabled/elderly people	3	1	3	4
More frequent (time unspecified)/ more buses	3	4	3	2
No ghost buses / cancellations / no shows	3	3	1	4
Improve app / online / RTI	1	0	1	1
More routes	1	1	1	1
Driver issues	1	0	0	1
Other	2	1	1	3
Don't know	1	1	2	0
No improvement necessary	19	14	16	23

Q.7 Do you have any suggested areas for improvement for these altered and renumbered bus routes?

Base: All Bus Users – 2,559

Suggested Areas for Improvements by Phase and Time of the Week

More positive feedback during weekends than weekdays. Delays, lack of punctuality and capacity issues are especially reported from weekday users.

	TOTAL	Phase x Day					
		Phase 5a x Weekday	Phase 5a x Weekend	Phase 5b x Weekday	Phase 5b x Weekend	Phase 6a x Weekday	Phase 6a x Weekend
	2,559	441	91	647	125	1018	237
	%	%	%	%	%	%	%
Improve punctuality / Fewer delays	55	66	64	59	51	50	42
More buses at peak times	30	29	26	34	26	31	18
More buses outside peak times (nights, evenings)	24	20	19	30	23	25	17
Improve accuracy of Real Time signs	21	19	7	23	18	23	20
More/improved shelters	8	5	7	6	10	9	10
More security	7	7	4	6	10	8	9
Improve cleanliness	7	7	4	10	6	6	5
Improve overcrowding	6	2	3	6	9	7	10
Improve access for disabled/elderly people	3	1	1	3	2	4	3
More frequent (time unspecified) / more buses	3	3	7	2	6	2	1
No ghost buses / cancellations / no shows	3	2	4	1	1	4	2
Improve app / online / RTI	1	0	-	1	-	1	-
More routes	1	0	2	1	2	1	-
Driver issues	1	0	-	0	-	1	1
Other	2	1	-	1	2	3	3
Don't know	1	1	1	2	2	0	1
No improvement necessary	19	15	12	15	21	21	31

Q.7 Do you have any suggested areas for improvement for these altered and renumbered bus routes?

Base: All Bus Users – 2,559

Suggested areas for Improvement among those who report the service is worse than before

Users who report the service is now worse more negative in all the aspects. Small base, but virtually all who think the service is now worse in Phase 5a suggest to improve punctuality.

Phase 5a: W-Orbitals

	All Users	Users reporting the service is worse than it was
Base	532	24
	%	%
Improve punctuality / Fewer delays	66	96
More buses at peak times	28	46
More buses outside peak times (nights, evenings)	19	38
Improve accuracy of Real Time signs	17	29
More security	7	-
Improve cleanliness	7	13
More/improved shelters	6	17
More frequent (time unspecified) / more buses	4	-
No ghost buses / cancellations / no shows	3	4
Improve overcrowding	2	-
Improve access for disabled/elderly people	1	4
More chargers	1	-
More routes	1	-
Improve app / online / RTI	0	-
Antisocial behaviour / passenger issues	0	-
Driver issues	0	-
Fix clustering of buses / space out buses	0	-
No improvement necessary	14	-

Phase 5b: S-Orbitals

	All Users	Users reporting the service is worse than it was
Base	772	65
	%	%
Improve punctuality / Fewer delays	57	68
More buses at peak times	33	35
More buses outside peak times (nights, evenings)	28	32
Improve accuracy of Real Time signs	22	29
Improve cleanliness	10	8
More security	7	11
More/improved shelters	7	9
Improve overcrowding	7	5
More frequent (time unspecified) / more buses	3	14
Improve access for disabled/elderly people	3	3
No ghost buses / cancellations / no shows	1	-
More routes	1	2
Improve app / online / RTI	1	3
Antisocial behaviour / passenger issues	0	2
Driver issues	0	2
No improvement necessary	16	3

Q.7 Do you have any suggested areas for improvement for these altered and renumbered bus routes?

Suggested areas for Improvement among those who report the service is worse than before

Users who report the service is now worse in Phase 6a more likely to report improvements are needed re punctuality, capacity and shelters.

Phase 6a: N2 Orbitals & E-Spine

	All Users	Users reporting the service is worse than it was
Base	1,255	147
	%	%
Improve punctuality / Fewer delays	49	71
More buses at peak times	28	44
More buses outside peak times (nights, evenings)	23	36
Improve accuracy of Real Time signs	23	31
More/improved shelters	9	21
More security	8	7
Improve overcrowding	8	16
Improve cleanliness	6	9
Improve access for disabled/elderly people	4	10
No ghost buses / cancellations / no shows	4	7
More frequent (time unspecified) / more buses	2	5
Fix clustering of buses / space out buses	1	1
More routes	1	4
Improve app / online / RTI	1	1
Antisocial behaviour / passenger issues	1	-
Driver issues	1	3
More chargers	0	-
No improvement necessary	23	5

Q.7 Do you have any suggested areas for improvement for these altered and renumbered bus routes?

 = Significantly higher

5. SUMMARY



BusConnects Research 2025: Summary of the Results

Costumers' Evaluation of Phase 5a: W Orbitals, Phase 5b: S-Orbitals, Phase 6a: N2-Orbital & E Spine

A redesign that's working well, with reliability the watch-out.

1. Satisfaction with the services is strong

These three phases of Dublin City Bus Network redesign are positively rated. Almost 8 in 10 users of the new bus routes are satisfied. Especially positive is that 38 % of them are 'very' satisfied with the service. Satisfaction is marginally higher for the N2-Orbital & E Spine with 81% satisfied.

2. For the great majority the redesign has improved the services

45% say the bus service in the area is better now. 38% say it is about the same and 13% report the service as disimproved. Perceived improvement is strongest for the W-Orbitals (59% say it is better now). Perceived disimprovement is highest (15%) on N2-Orbital & E-Spine.

3. The redesign has encouraged more bus use

Since the new routes were introduced, 42% overall have either started using the bus or are using it more, with the biggest uplift on the W-Orbitals (56% have started using the bus or are using it more).

4. More reliable service is main recommended area across the three phases

Given the main reason for usage is commuting for work, it is perhaps not surprising that the most common request is improved punctuality and fewer delays (around half of users overall, and highest on the W-Orbitals). Capacity is the next theme: more buses at peak times and additional off-peak services are frequently mentioned and this is especially the case for S-Orbitals.

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W-Orbitals

As a new route it is perhaps not surprising that the W- Orbital passengers are most likely to say the service had an impact on their bus usage. Users are most likely of the three phases to say the service has improved versus before (59% “better now”) and to report they are using the bus more (56% have started using the bus or are using it more).

The principal weakness is reliability: punctuality and delays are the dominant improvement request (66%), with secondary asks for additional buses at peak (28%). Given the dominance of working commuters on this route perhaps not surprising.

S-Orbitals

Delivery is solid and broadly in line with the network average. Overall satisfaction sits at 77% (with 40% “very satisfied”), 44% feel the service is better than before, and 47% report using the bus more since the redesign.

Most suggested improvements relate both to reliability and capacity : 57% ask for better punctuality, 33% for more buses at peak and 28% for more off-peak bus. Feedback is measurably more positive at weekends than on weekdays.

N2-Orbital & E-Spine

This phase records the strongest customer satisfaction (81% satisfied; weekend satisfaction particularly high), and the lightest improvement agenda—nearly one in four users (23%) say no change is needed.

Nevertheless, there is a more polarised response to whether the service is better or worse. 41% say it is better (lower than average for this set of routes and 15% say it is worse)

Punctuality is the most suggested area for improvement also for this Phase (49%), but incidence is lower than for other phases.