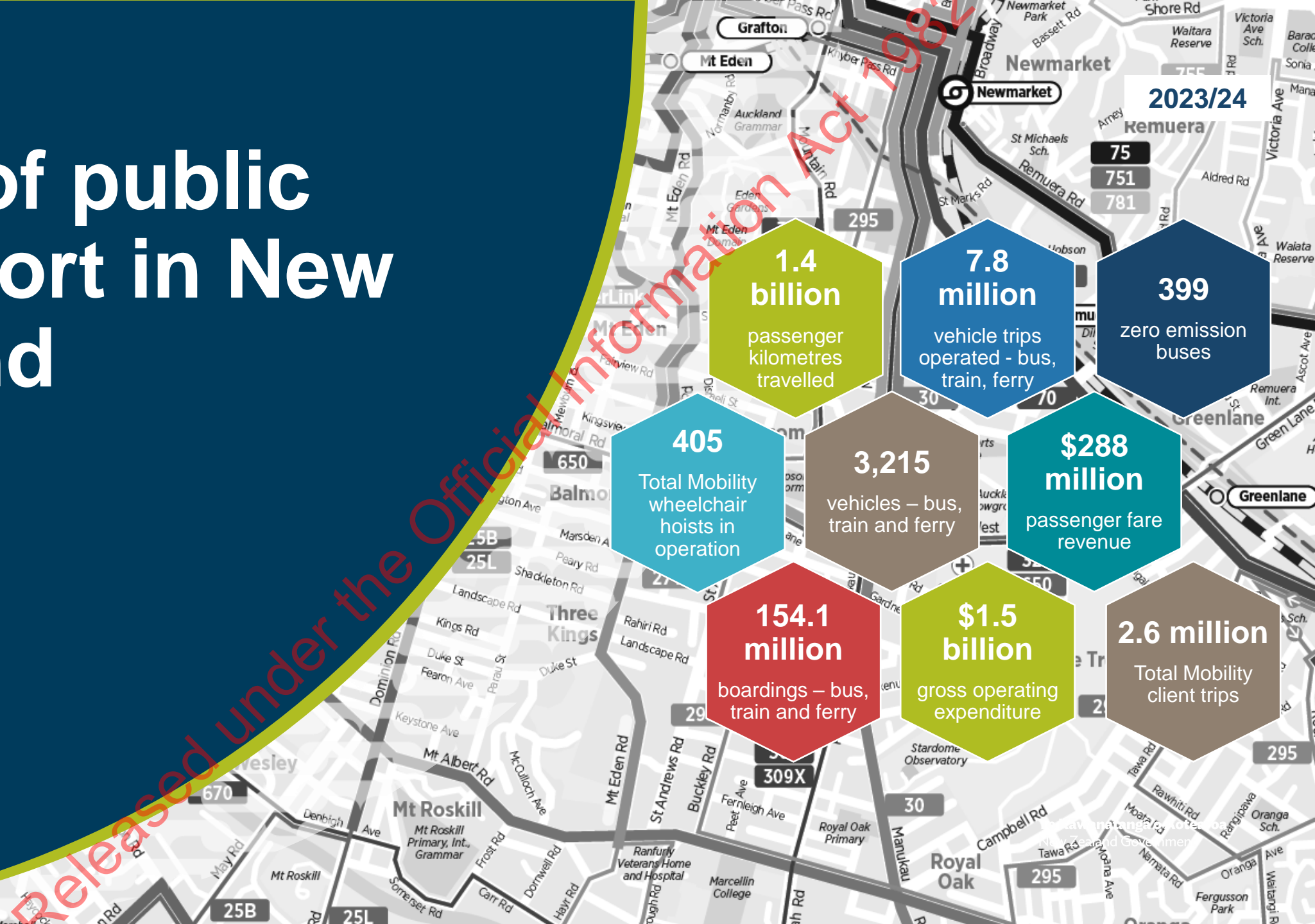
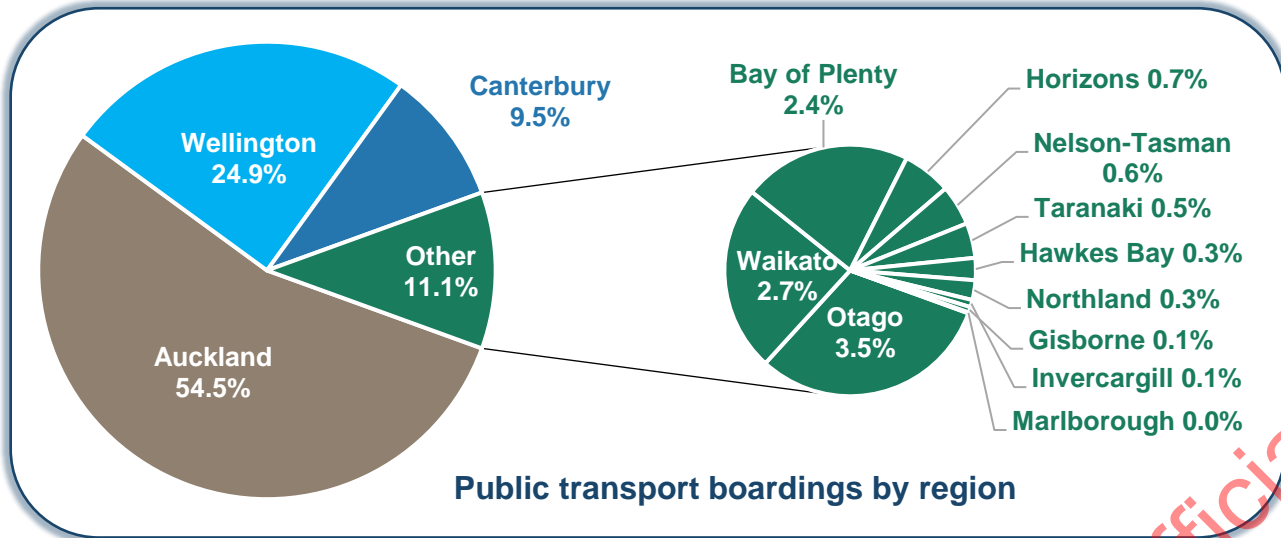


State of public transport in New Zealand

2023/24

16 September 2024

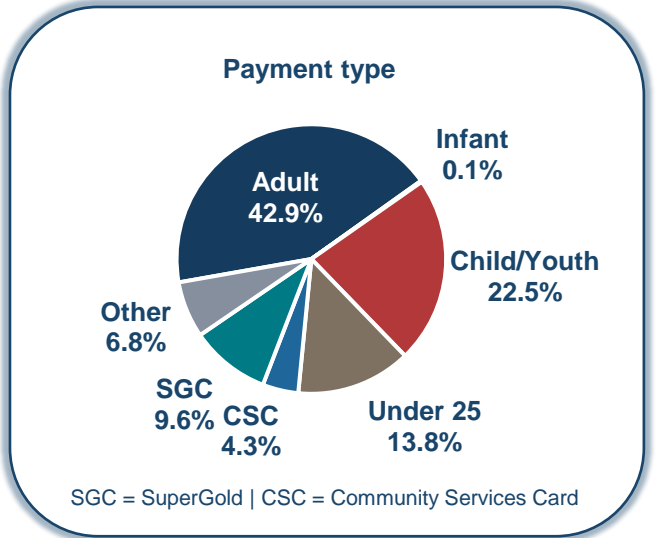




Crown fare concessions (SGC and CSC) account for **14%** of all boardings

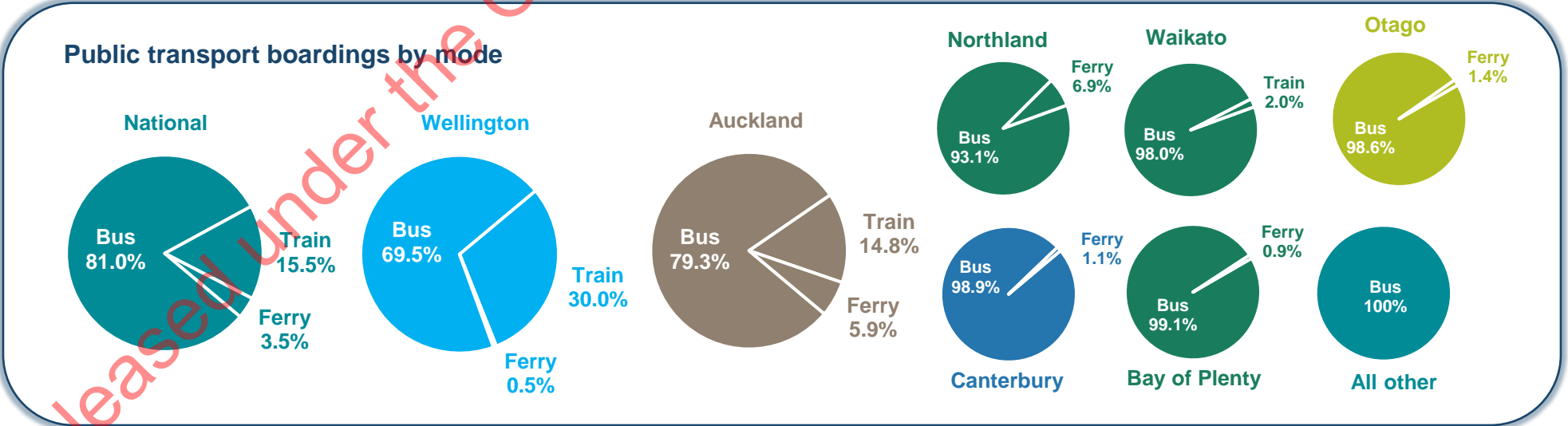
Nationally defined fare concession for child/youth account for **23%** of all boardings

NB: Under 25 is no longer available in most regions following its removal from Community Connect funding in Apr 2024.

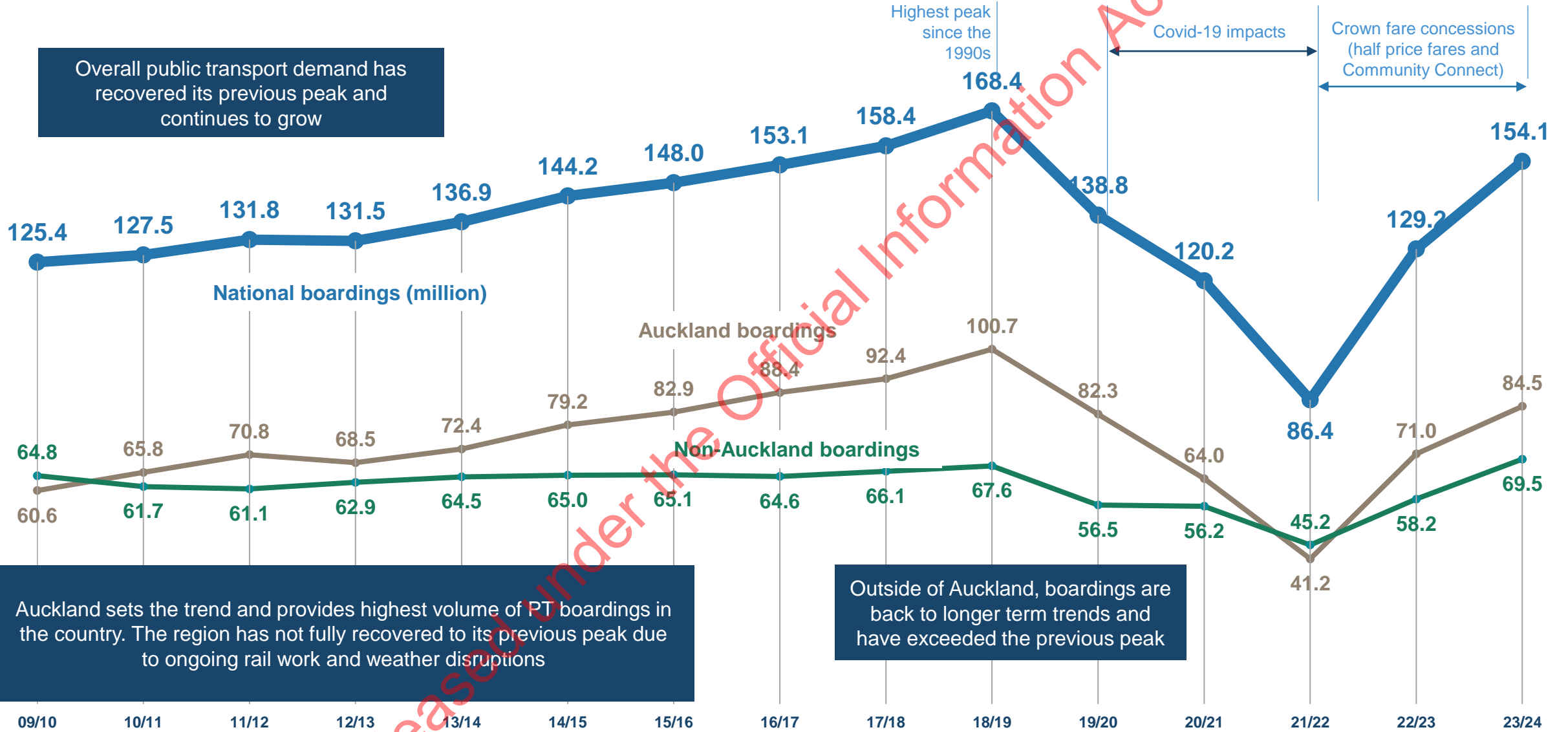


Auckland and Wellington account for **80%** of total public transport boardings. Almost **90%** of boardings are from the 3 largest regions only

Over **80%** of total public transport boardings nationally are on **buses**.

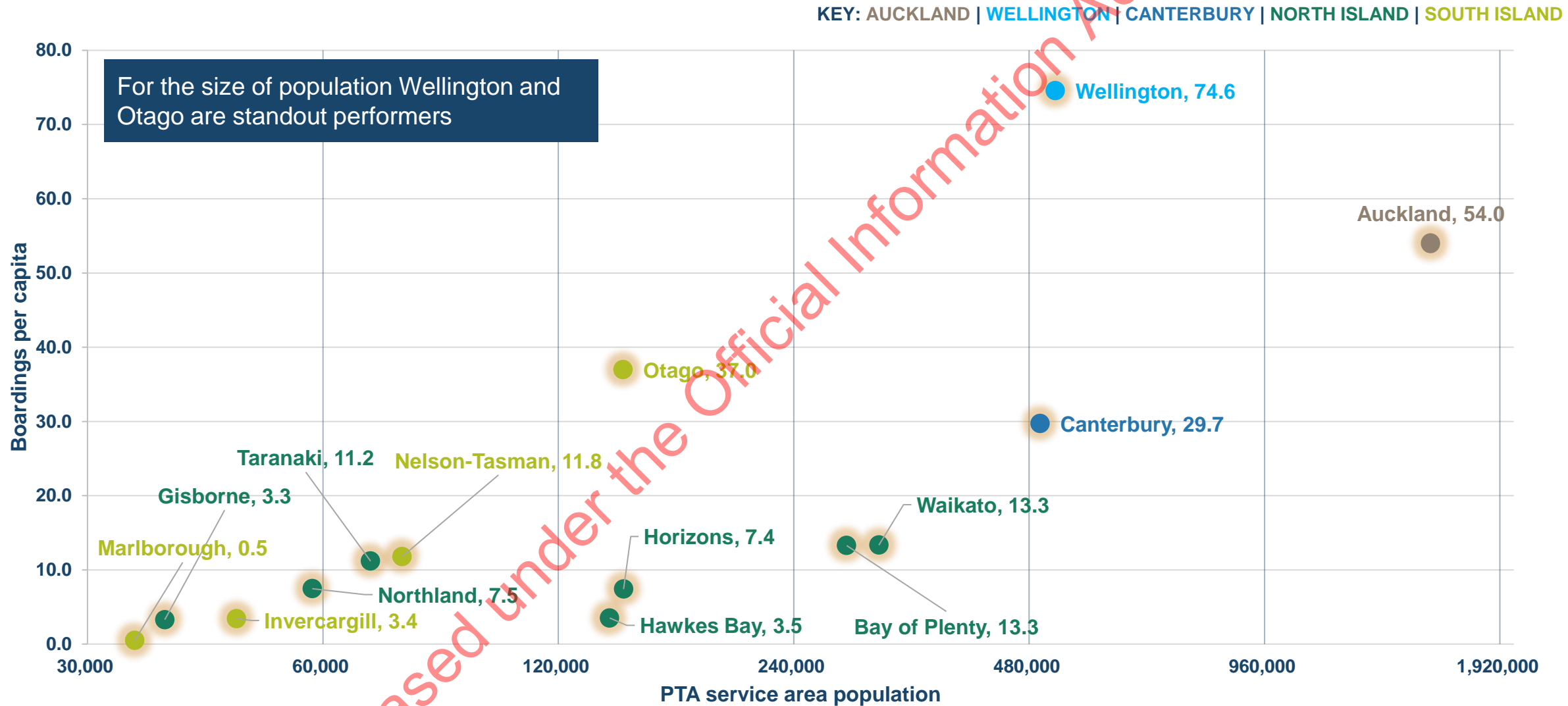


Public transport boardings over time



Public transport boardings per capita

2023/24



Note: Per capita is based on service area population, using statistical area 2 (SA2) medium population projections from StatsNZ for 2023 using 2018 census as base. SA2 areas included that have bus stops within them and are part of a functional urban area.

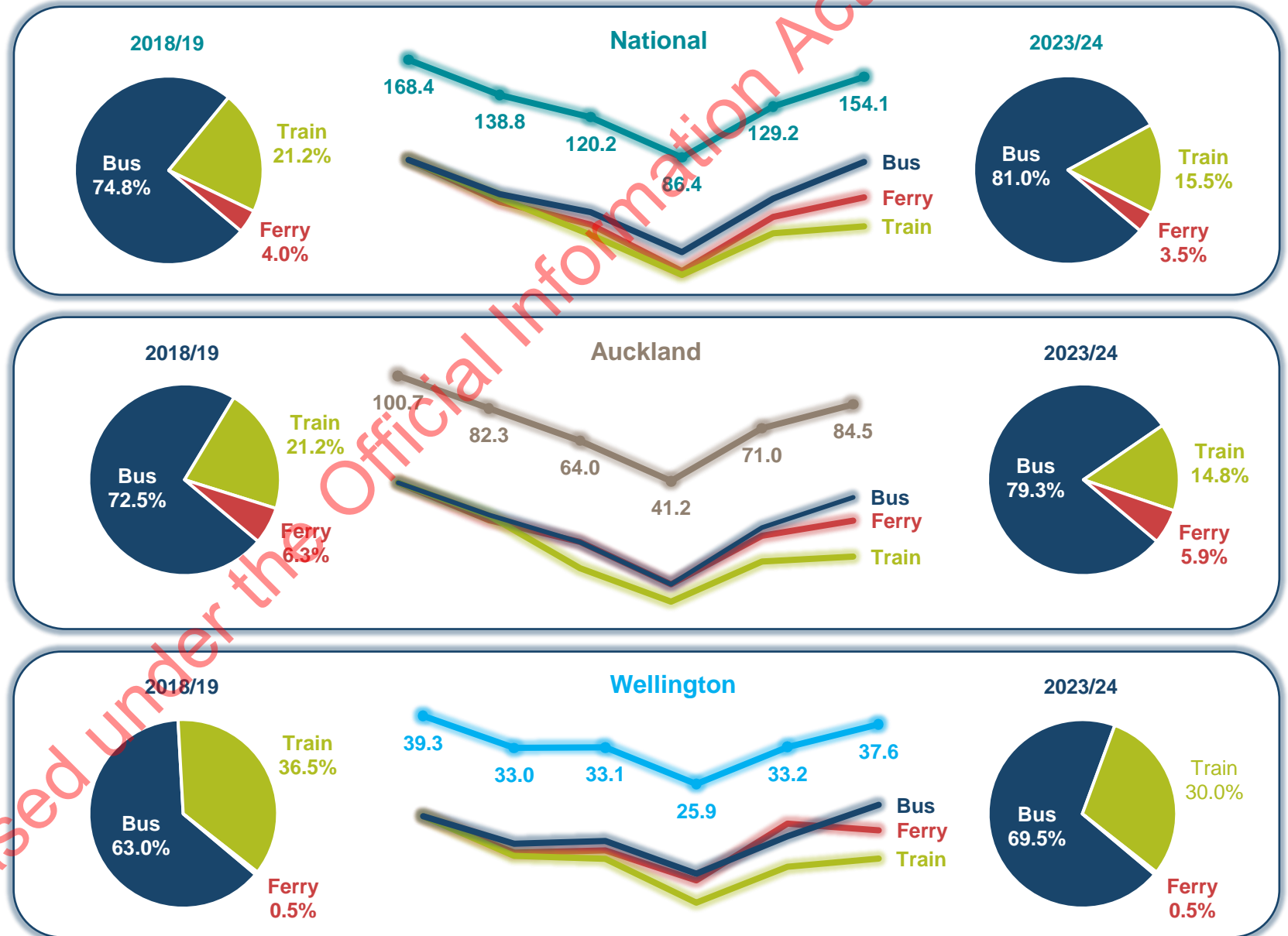
Public transport boardings by mode – since 2018/19 - 2023/24

2023/24

Bus boardings are increasing faster than train and ferry boardings

Ongoing rail disruption is holding back growth in Auckland and Wellington.

Rail is expected to maximise its share in the market once key projects open and disruption eases, e.g. Papakura to Pukekohe, CRL



NB: Chart has been plotted so each mode has the same index value for 2018/19

Performance of public transport services – reliability, punctuality, cancellations

2023/24

Reliability trips that depart on time

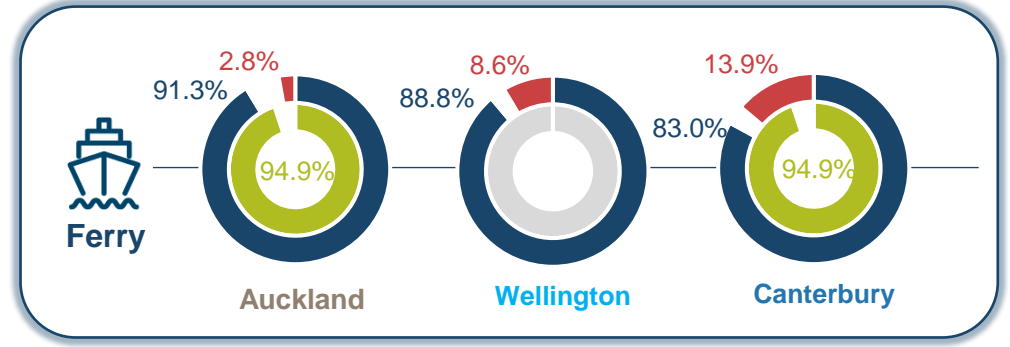
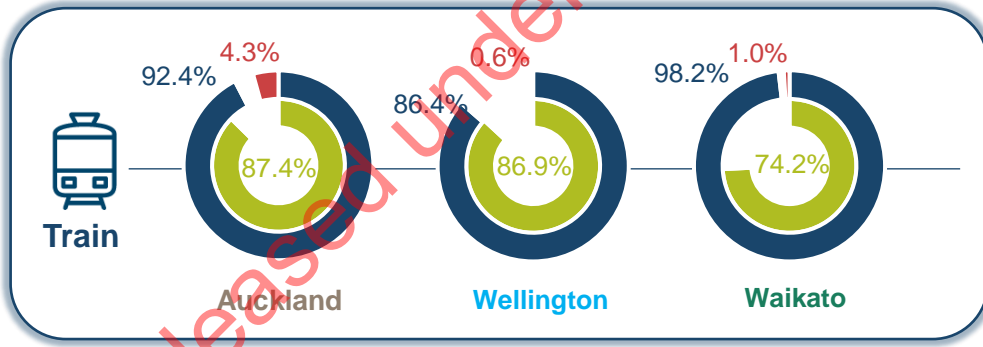
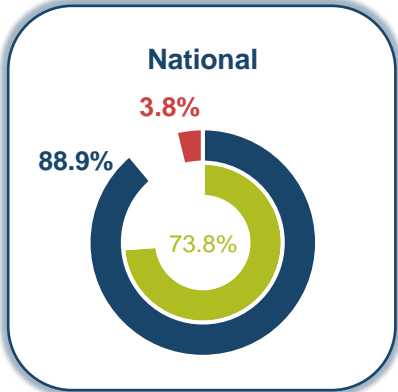
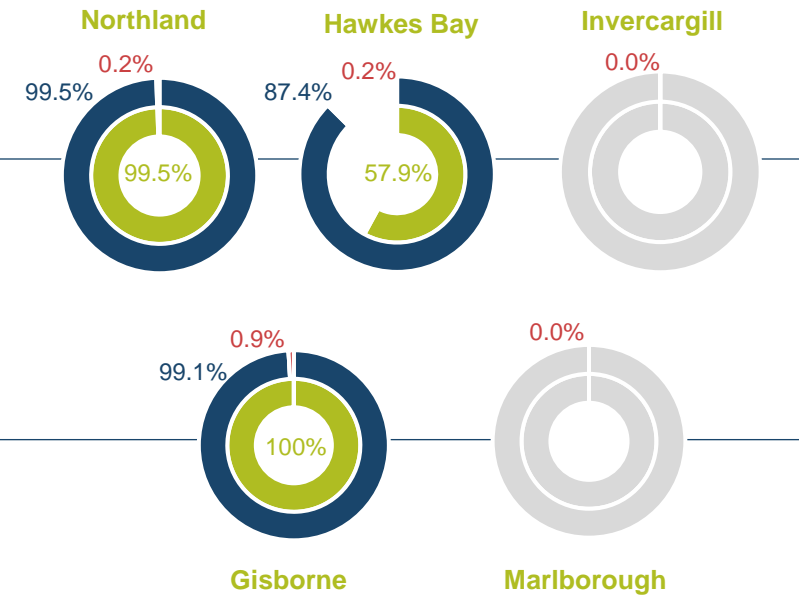
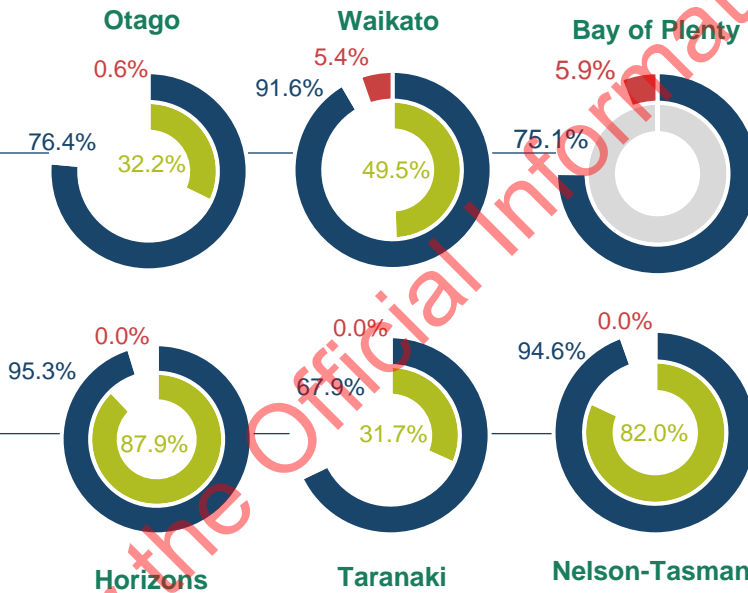
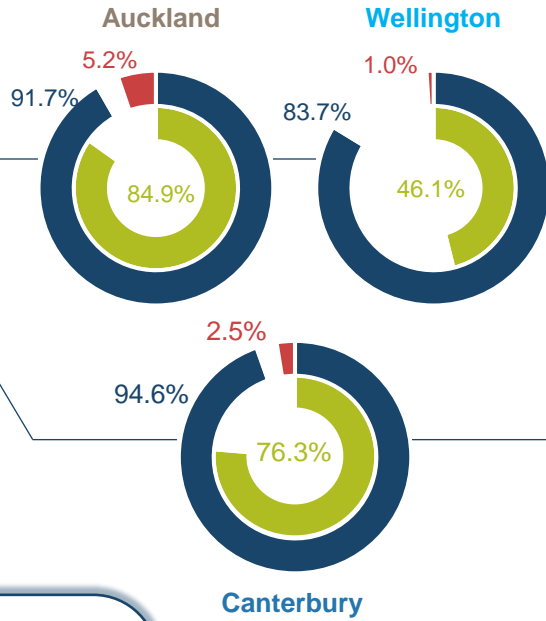
Cancellations difference between scheduled and operated trips

Punctuality trips that depart and arrive on time

Large regions

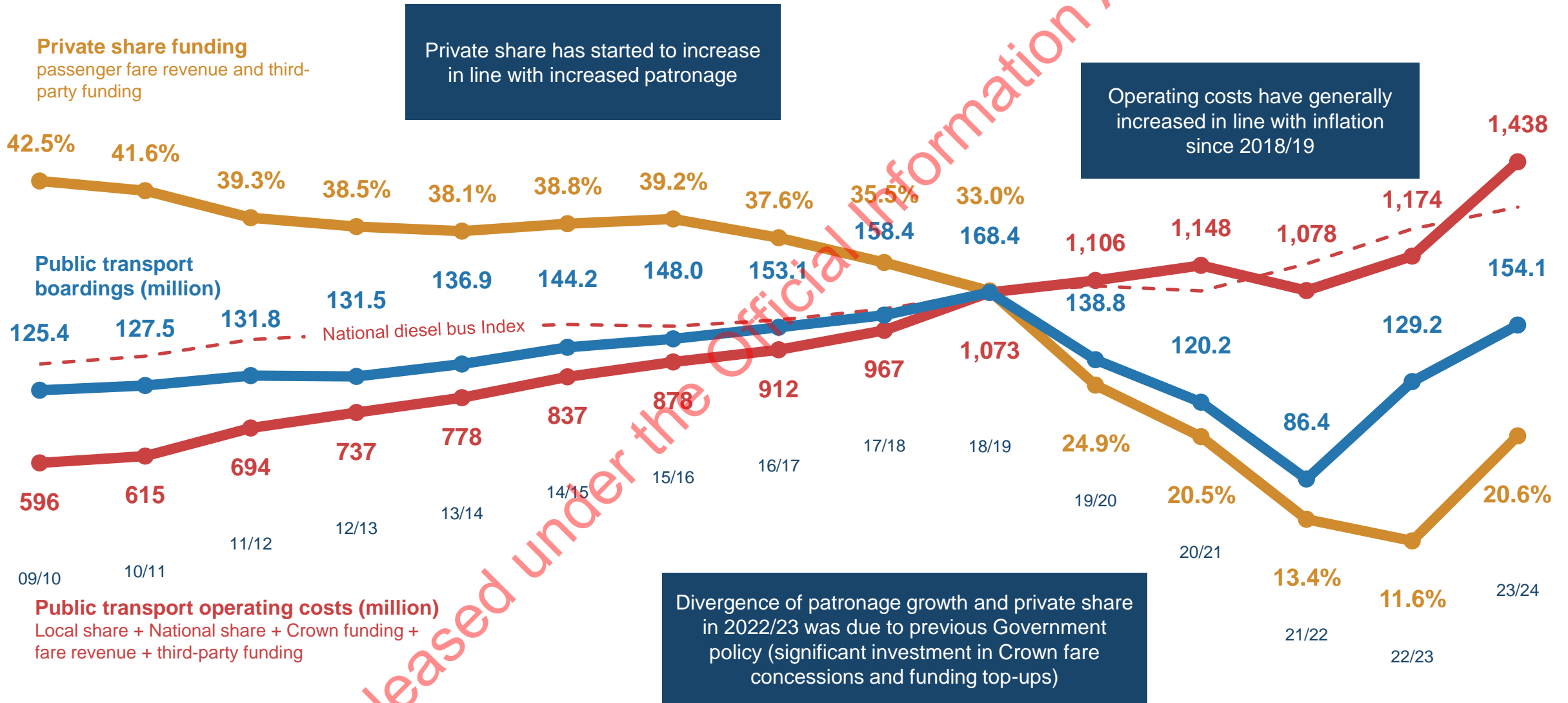
Medium regions

Smaller regions



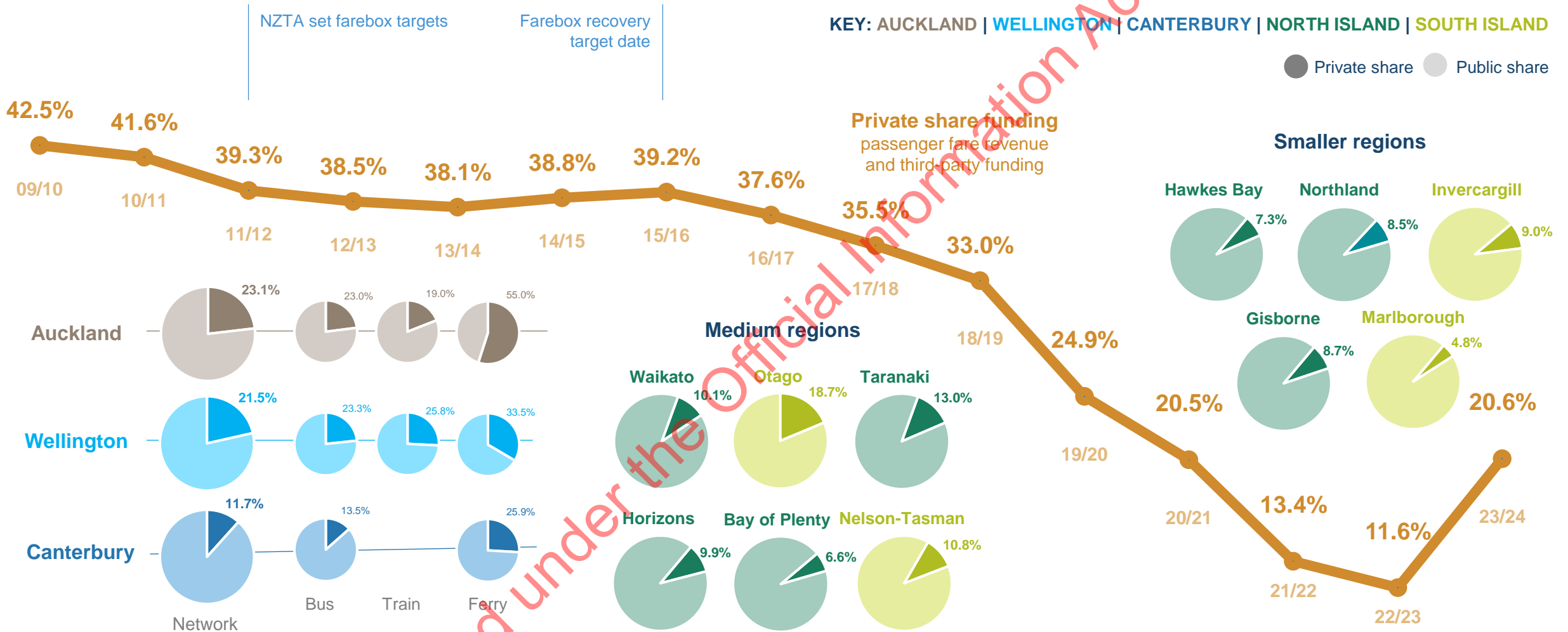
Boardings, operating costs and private share trends over time

2023/24



Private share of public transport operating expenditure

2023/24



Key Findings: Where to from here?

Patronage

- Patronage outside of Auckland is now exceeding 2018/19 peak and back to long-term trends.
- Auckland PT usage is growing but remains below its 2018/19 peak, impacting national figures as Auckland represents over 50% of national patronage
- Bus patronage is leading growth in Auckland, with rail and ferry usage impacted by disruptions and not reaching their full potential
- Improved service reliability and on-time performance will help sustain bus patronage growth and lift rail and ferry patronage nationally
 - Auckland rail performance will improve post-completion of track work and City Rail Link
 - Increased infrastructure investment will improve bus on-time performance

Service performance reporting

- NZTA is focusing on improving service performance reporting nationally
- Improvements have been made, but further work is needed to improve data quality, which will benefit oversight and monitoring and inform patronage uplift measures

Operating expenditure and private share funding

- Since 2018/19, PT operating expenditure has increased in line with input cost increases, particularly fuel and labour
- Private share funding has increased between 2022/23 and 2023/24 and is trending up, driven by:
 - Patronage growth nationally
 - Reducing the scope of Community Connect to Community Service Card holders (reduced Crown subsidy)
 - Fare level increases across several regions, particularly Auckland
- Work is underway with PTAs to further increase private share funding

Discussion points

Increasing Private Share (IPS)

- **Increasing private share project launched and is underway with PTAs, including:**
 - establishing nationally consistent measures,
 - setting interim regional targets,
 - conducting research, and
 - developing policies and initiatives to drive private share growth.
- **Success requires enhanced cooperation between Regional and City councils**, encouraging innovative thinking and adopting a more business-oriented approach to service delivery and maximising value from PT assets in collaboration with the private sector.
- There is also an opportunity for NZTA and MoT to review and **ensure appropriate incentives** are in place for PTAs to accelerate progress and ensure ongoing improvement.

Improve local government (PTA) procurement

- Significant re-tendering to occur this NLTP 24-27 period, particularly bus contracts.
- A short window of opportunity but high potential to influence the sector
- Need clear expectations regarding LTMA changes to maximise certainty for the sector, including enabling value for money.
- Updating NZTA operational policies will help foster a competitive and efficient supplier market. Key focus areas:
 - PT procurement manual for PTAs,
 - standardising key contracting elements nationally,
 - fostering innovation and improving procurement practices, and
 - increasing data and information transparency.