

<b>Subject</b>	<b>Monthly reporting requirements for public transport authorities</b>
Circulation	Public transport authorities
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## 1 Purpose

This document sets out the requirement for public transport authorities (PTAs) to provide monthly public transport patronage and service performance data to the New Zealand Transport Agency Waka Kotahi (NZTA). This is a request for information under section 128 of the LTMA 2003.

Please note that the requirements in this document will be a module within the NZ public transport framework (PTF) which is being developed and will combine all relevant NZTA requirements, policy, and guidance for PTAs into one place. The PTF will be released in June 2024 and updated thereafter as needed.

## 2 Background

NZTA has a statutory function to oversee the planning, operation, implementation, and delivery of public transport and PTAs must provide information to NZTA when requested (s128, 95(1)(i), LTMA 2003).

NZTA has previously required public transport authorities to report monthly data on a quarterly basis. This was changed to monthly reporting from 1 Jul 2023.

NZTA is working to improve public transport system monitoring and reporting. In the meantime the following requirements are to apply to monthly reporting. These requirements align with the monthly reporting public transport authorities are currently providing.

## 3 Requirements

PTAs **must** provide monthly reporting to NZTA by the 15<sup>th</sup> calendar day of each month, unless otherwise agreed in writing by NZTA. NZTA **may** withhold payment of claims to any PTA that fails to meet the reporting deadline or provide the required data, with payments released when reporting requirements are met.

PTAs **must** use the system provided by NZTA for the purpose of monthly reporting. The system is currently an Excel template emailed to NZTA but will change as NZTA transitions to automated systems for the sharing of data between organisations.

### 3.1 Patronage and fares

PTAs **must** provide the following metrics relating to patronage and fares:

- Boardings - number of passenger boardings including transfer boardings
- Passenger-kms - number of kilometres travelled by passengers
- Fare revenue - fares paid by passengers (excl. GST)

PTAs **must** provide a breakdown of patronage and fare metrics using the following dimensions:

- Mode – bus, train or ferry. Other modes such as on-demand, cablecar, elevator should be recorded as bus due to current system limitations.

- Unit – contracted units and exempt services. Unit name must be as recorded in RPTP and be consistent with other NZTA reporting requirements relating to units. Exempt services that are integral to the public transport network, including those receiving Crown fare concessions must be included as separate units.
- Payment type – card or cash. Card to include all non-cash passengers, including counts and multi-trip tickets.
- Period – peak or off-peak based on SuperGold card hours.
- Passenger type – categorised as follows. Transfer boardings are to be counted as boardings within the relevant concession group.
  - Adult – standard passenger with no concession
  - National concessions
    - Infant - passengers aged under 5
    - Child - passengers aged between 5 and 12 (inclusive)
    - Youth - passengers aged between 13 and 18 (inclusive)
    - Under25 - passengers aged between 19 and 24 (inclusive)
  - Crown concessions
    - CSC - Community Services card holders
    - SGC – SuperGold card holders
  - Regional concessions (not applicable to all PTAs)
    - Accessibility – passengers who receive an accessibility or disability concession. Criteria may differ between regions.
    - Tertiary – Passengers who receive a tertiary student or similar concession. Criteria may differ between regions.
    - Senior – passengers who receive a senior concession that is not SuperGold card. Criteria may differ between regions.
    - Other - passengers who receive any other type of concession not otherwise specified.

### 3.2 Service performance

PTAs **must** provide the following metrics relating to service performance:

- Scheduled trips – number of scheduled service trips
- Operated trips – number of scheduled service trips completed in full
- Depart on time – number of services departing from origin on time. Where "on time" means services operated between 59 seconds before and 4 minutes and 59 seconds after the scheduled departure time (or arrival time at the destination)
- Arrive on time – number of services departing from origin on time and arriving at destination on time. Where "on time" means services operated between 59 seconds before and 4 minutes and 59 seconds after the scheduled departure time (or arrival time at the destination).
- Scheduled service-kms – **new requirement** total service-kms from scheduled service trips
- Service-kms operated – **new requirement** total service-kms operated by vehicles

PTAs **must** provide a breakdown of service performance metrics using the following dimensions:

- Mode – bus, train or ferry. Other modes such as on-demand, cablecar, elevator should be recorded as bus due to current system limitations
- Unit – contracted units and exempt services. Unit name must be as recorded in RPTP and be consistent with other NZTA reporting requirements relating to units. Exempt services that are integral to the public transport network, including those receiving Crown fare concession must be included as separate units.

PTAs **must** seek approval from NZTA if they are unable to report any metric and **must** agree a timeline for when they will begin reporting any missing metrics.

PTAs **must** seek approval from NZTA for any variation from the metric definitions, in particular the definitions for depart and arrive on time measures.

### 3.3 Total Mobility

PTAs **must** provide the following metrics relating to Total Mobility:

- Passenger trips – number of passenger trips undertaken using Total Mobility
- Hoist trips – number of hoist trips undertaken using Total Mobility
- Total fare – total fare on taxi meter (excl. GST) before applying applicable fare caps
- Fare paid – total fare paid (excl. GST) by the passenger
- Fare subsidy – total fare subsidy (excl. GST) claimed through Total Mobility after applying applicable fare caps
- Hoist fee – total fare subsidy (excl. GST) claimed for hoist fees

PTAs **must** provide a breakdown of service performance metrics using the following dimensions:

- Service area – the name of the community or town where the passenger trip occurred
- Operator name – the name of the taxi company providing the service (this is the equivalent of unit for public transport services).

PTAs **may** and are encouraged to provide reporting direct from the Ridewise system. NZTA can advise on how to do this.

## 4 Next steps

The NZTA public transport regional delivery team has been working closely with PTAs on monthly reporting requirements and will continue to do so.