

RN 009B – Impact of half-price public transport fares – a research note

Surveying undertaken up to June 2023

Published July 2024



A note to the audience

While NZ Transport Agency Waka Kotahi (NZTA) provided investment, the research was undertaken independently, and the resulting findings should not be regarded as being the opinion, responsibility or policy of NZTA or indeed of any NZ Government agency.

NZTA is established under the Land Transport Management Act 2003. The objective of NZTA is to undertake its functions in a way that contributes to an efficient, effective and safe land transport system in the public interest. NZTA funds innovative and relevant research that contributes to this objective.

People using this research should apply and rely on their own skill and judgement and, if necessary, they should seek appropriate legal or other expertise regarding its use.

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Sector Research Programme - overview

NZ Transport Agency Waka Kotahi (NZTA) works with the sector to identify and address gaps in the sector's knowledge and understanding of the development, management and operation of the land transport system.

We work alongside subject matter experts to:

- develop a programme of research projects to address knowledge gaps, in consultation with the wider sector (including the Ministry of Transport and Local Government)
- procure research providers to undertake and deliver the work
- provide project oversight and guidance, and
- publish, promote and support the implementation of the resulting research outputs.

Summary of primary data sources

All primary data in this analysis is sourced from two existing surveys:

NZTA Customer Journey Monitor: a nationally representative monthly online survey of NZ adults 15+, usual sample n = c. 1,000. June and July surveys boosted to n = c. 2,000 adults to facilitate deeper half price fares analysis. Data are weighted each month to match the known sample universe for age and gender based on the 2018 census. Within analysis of most recent journey *only*, data are also weighted according to mode usage based on data from the New Zealand Household Travel survey. Targets are supplied by NZTA and weighting is processed by field and data supplier Dynata.

NZTA COVID Transport Impacts Survey: a nationally representative ad-hoc survey of NZ adults 15+, with boosts to major urban areas. Usual sample of n = c. 1,259. Data are weighted each wave to match the known sample universe for age, gender, region and ethnicity, based on the 2018 census. Targets are supplied and weighting processed by Ipsos. Note: targets for region weighting group the country into six regions, rather than the full 16 administrative regions. This is designed to mitigate the impact of over-sampling in Tauranga, Wellington City, Dunedin, Hamilton and Christchurch, which are down-weighted to normal population distributions.

Awareness and impact of half-price fares have been collected in both surveys in different ways:

- In relation to *most recent journey, main mode used* within the **Customer Journey Monitor** for April 2022 to June 2023.
- In relation to *past week travel and mode usage* within the **COVID transport impacts survey** in May 2023 and the **Customer Journey Monitor** in May 2022 to June 2023.

Sources are analysed either in isolation, or in a merged data set consisting of common variables (including demographic questions) from both surveys. Where datasets are merged, responses from each source retain their original weighting, with each source treated as a separate 'wave' of the research. Within this report, slide footers will clearly indicate the **project source, sample description** and (where not contained within graph axes) the bases for the relevant audiences.

Data sources are combined for analysis by Ipsos New Zealand.

Summary of non-survey data sources

- **Patronage recovery and passenger boardings:** Data collated monthly by NZTA from local authorities / councils in: Auckland, Wellington, Canterbury, Otago, Waikato, Bay of Plenty, Horizons, Taranaki, Hawkes Bay, Nelson – Tasman, Northland, Invercargill, Gisborne and Marlborough.
- **Public transport punctuality and cancellations:** Data collated monthly by NZTA from local authorities / councils in: Auckland, Wellington, Canterbury, Otago, Waikato, Bay of Plenty, Horizons, Taranaki, Hawkes Bay, Nelson – Tasman, Northland, Invercargill, Gisborne and Marlborough.
- **Auckland rainfall data:** Cumulative rainfall data from MetService <https://www.metservice.com/towns-cities/locations/auckland/past-weather>, Auckland Airport site data up to end of July 2023 as accessed on 02/08/2023. Location selected for analysis due to provision of historic data, unavailable for Auckland Central locations.

Executive summary

Impact of half-price public transport fares

Executive summary – impact on PT usage

There is evidence of an increase in public transport boardings since July 2022, all while half-price fares have been in effect. However, this has not yet met pre-COVID levels and long-term changes to travel patterns in the New Zealand public limit this increase.

Buses, trains and ferries have seen an increase in reported weekly *users* during the same period, more reported weekly users in December 2022 than at any time since April 2020.

However, those users have reported roughly the same number of days travelling by PT modes as throughout the past three years. Whilst there may be more users on the network than in recent years, their travel may be less frequent, preventing patronage from reaching pre-COVID levels.

The beginning of 2023 has seen the proportion reporting PT as their *main mode on recent journey* in the Customer Journey Monitor at 3%. This has been consistent for 6 months and is 1-point higher than at any point on record, including the 12 months April '19 – March '20 before the impact of COVID-19.

Consistently, around a third of PT users have reported that some of their travel occurred as a result of half-price fares, with at least 1-in-10 switching from cars and taxis and a similar share switching from walking and cycling. Around 1-in-20 reported making brand new journeys.

As seen in previous reporting, the journeys made reflected the sorts of purposes that PT is normally used before: skewed more towards journeys for work and study.

Those switching from active modes tended to travel by PT on more days than others and their destinations generally reflected those most walked and cycled to: travelling to more built-up urban areas. However, were half-price fares not in place, around a third of active mode switchers say they likely would have taken a private vehicle for the journeys they replaced, so in some cases HPFs may have prevented switching from active modes to cars.

Those switching from private vehicles didn't report more days of PT travel than other users. However, their destinations differed significantly from normal private vehicle and taxi travel. These journeys are often to less built-up areas, but the private vehicle journeys replaced by PT were into more built-up, city centre destinations.

Executive summary – mitigating factors

Some mitigating factors may have prevented greater PT uptake during this time. Bus cancellations remained above 10% as the proportion using this mode was increasing, only reducing at the end of 2022, whilst train punctuality reduced during this time that passengers were increasing.

Some of this disruption, particularly train cancellations, corresponds with severe weather events in the North Island, especially late January/early February in Auckland, where a large share of train users live. Some line closures in the city in 2023 may also have prevented further growth in train usage.

Long term, working from home disproportionately impacts public transport and continues to be common. At least a third of working adults do so once a week, for more than three days on average. Evidence from COVID-19 impact tracking in November 2022 showed at least 17% of pre-COVID PT commuters were removed from the network due to working from home or being out of the workforce.

Access and viability also continue to limit PT uptake. The majority of past week travellers in the Customer Journey monitor indicate that PT modes are not realistic for the journey they want to take and more than a third of non-users say that public transport doesn't go where they need to go.

Finally, it should be recognised that other modes of travel are incentivised in other ways, 7-in-10 working and studying adults have access to free parking at their most regular destination and many have access to facilities that make walking, running and cycling easier. Where driving is more accessible and parking is free, this may be more attractive than PT even when fares are reduced.

However, despite these barriers to uptake, there have been indications in increased PT usage across all parts of the New Zealand population. Previous analysis has shown that certain demographics, particularly those around urban centres, have naturally higher PT usage and were better placed to take advantage of half-price fares. Whilst reported weekly usage increased the most in these groups (New Zealanders with disabilities, younger New Zealanders), it has also been climbing for others, with many reporting new PT journeys as result of half-price fares, particularly towards the end of 2022 and beginning of 2023.

Has public transport usage increased?

Reported weekly usage of public transport modes

Summary of previous analysis to date

Patronage

Analysis of Auckland, Christchurch and Wellington patronage undertaken in August and October 2022 showed that while bus and train patronage had climbed within the 2022 calendar year, it remained below levels recorded at comparable times of year in 2019 (pre-COVID-19).

There was evidence that the way New Zealanders used the land transport network had undergone changes that may make demand less comparable to pre-COVID periods.

These include elevated incidence of working from home, particularly among populations that may be more likely to commute using public transport and reduced services or disruptions on the network.

These factors may limit patronage growth, at least in terms of the number of trips taken by passengers. Survey data showed that the proportion of weekly users for the period was comparable with 2019 levels, but that those PT users were travelling on fewer days, likely resulting in fewer trips recorded in patronage data.

Impact

The observable impact of half-price fares was in adding users to the public transport network who either took trips that they otherwise wouldn't have taken, or chose buses, trains and ferries to replace existing walked, cycled or driven journeys.

Around 7%-8% of all New Zealanders reported PT journeys in the June - October period that they otherwise wouldn't have taken. This equates to a third of those using the network during that period.

Journeys for work purposes are generally the most common form of patronage and so were the largest group of journeys added. However, completely new journeys were often one-off or infrequent trips that users might not have otherwise been able to take.

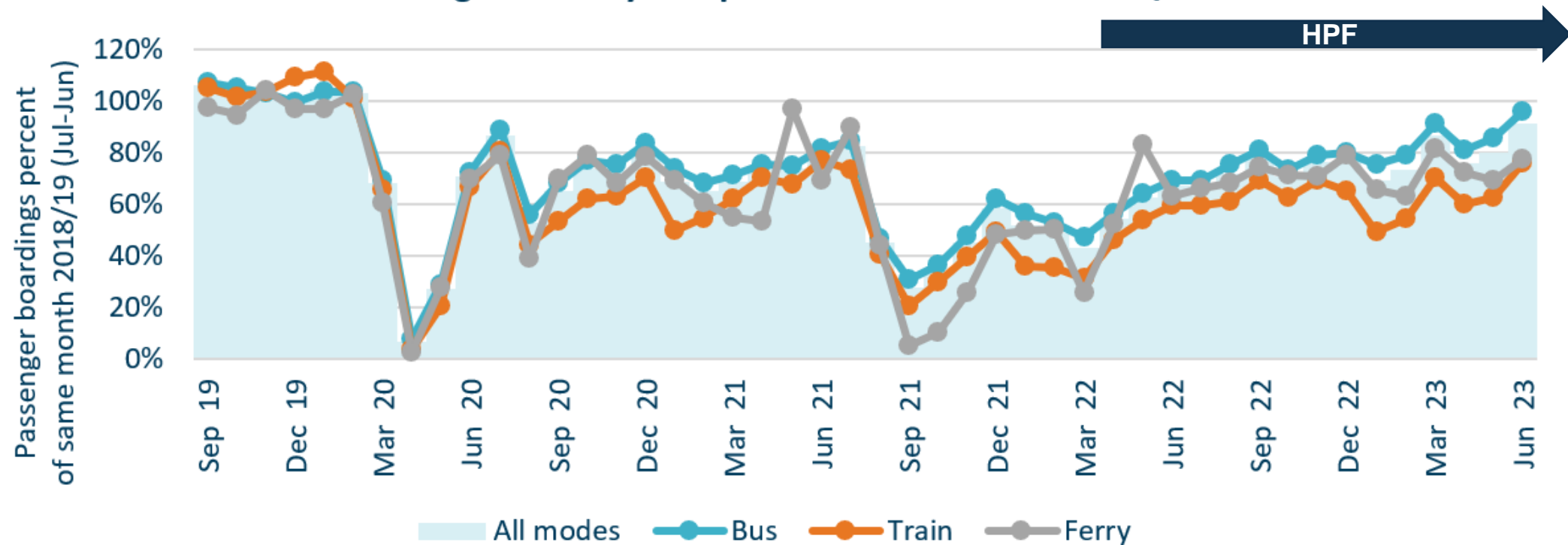
Journeys tended to be added in major urban areas, where networks are more developed and existing usage was relatively higher. This meant many of those with higher PT need (those with disabilities or without car access) were able to use half price fares to take more affordable journeys, as many live closer to existing networks.

Evidence covered in previous reports from [August 2022 and December 2022](#)

Patronage summary

Patronage, particularly on buses, has been climbing steadily compared to pre-COVID periods, but total boardings still remain a little way short of this level.

Patronage recovery compared to same month 2018/19

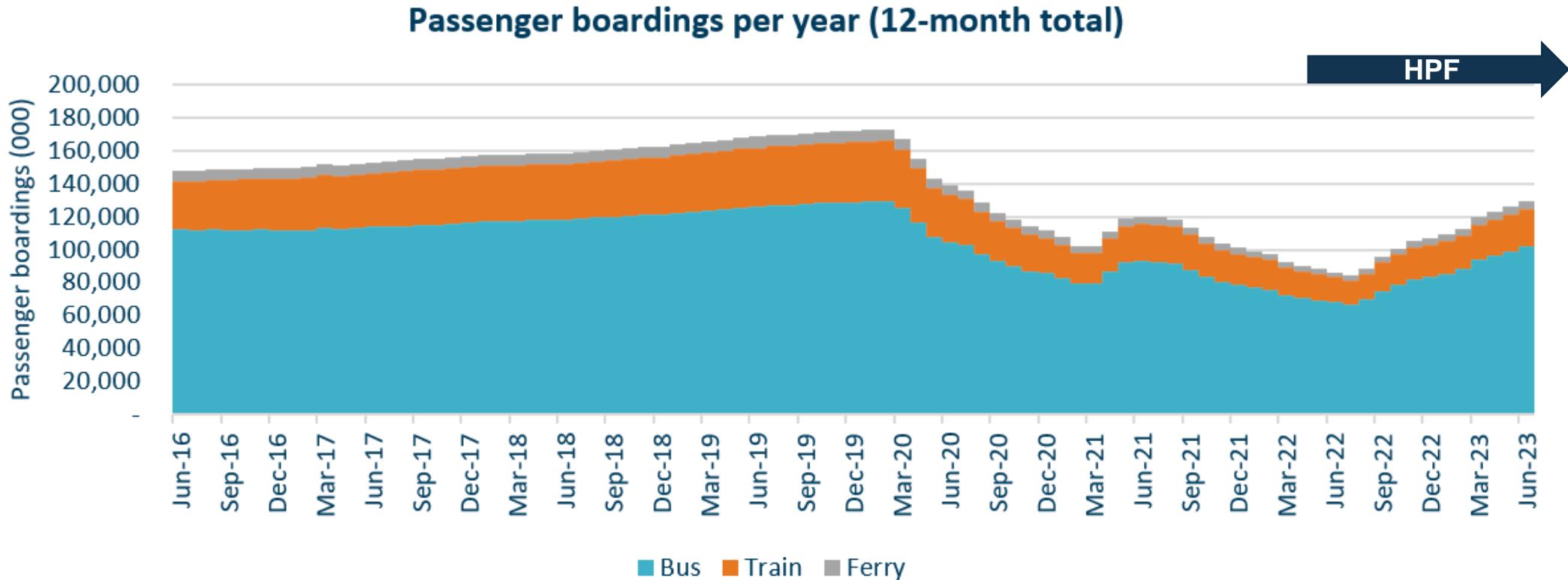


Passenger boardings as a percentage of same month FY 2018/2019

▲ Indicates a statistically significant increase from preceding time period
▼ Indicates a statistically significant decrease from preceding time period

Patronage summary

Half-price fares have been in effect since April 2022. For the first few months of this period, total boardings continued to decline, but they have built steadily since July 2022. Whilst not yet comparable with 2018/19, there has been a clear steady increase in boardings.

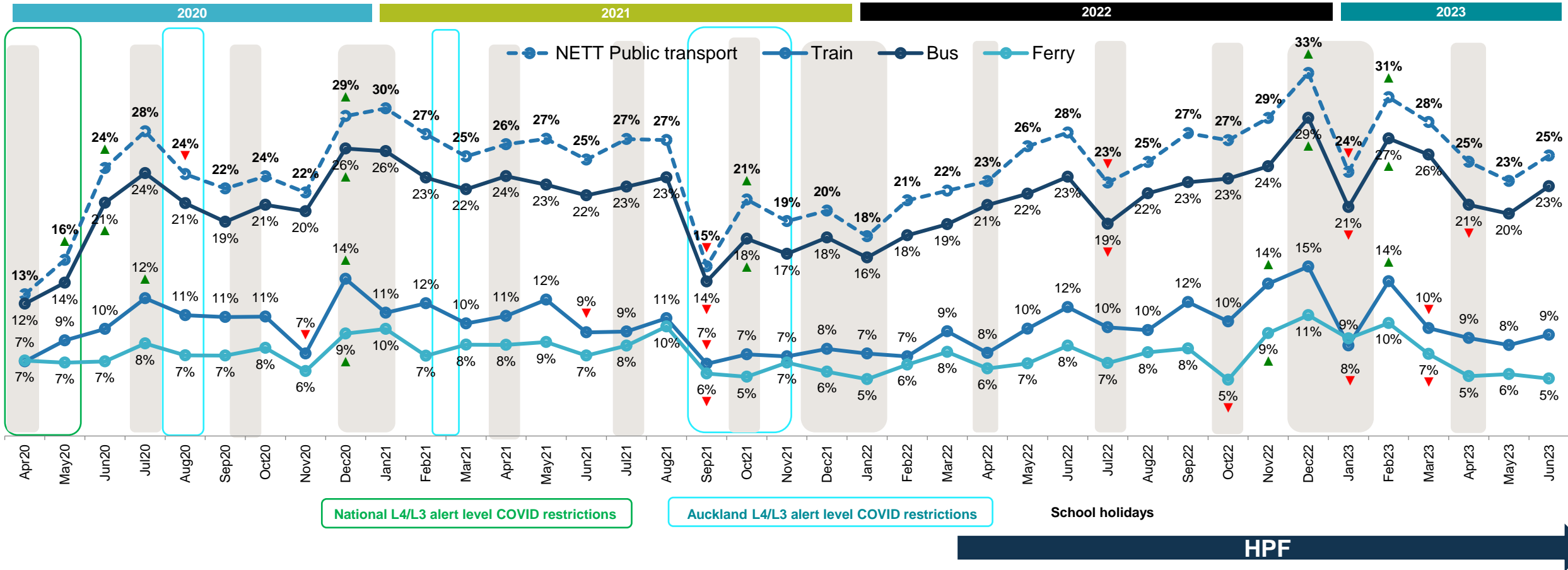


Passenger boardings as a percentage of same month FY 2018/2019

- ▲ Indicates a statistically significant increase from preceding time period
- ▼ Indicates a statistically significant decrease from preceding time period

Reported weekly users

December and February showed more reported weekly users on all public transport modes than at any time since weekly usage measurement began in April 2020.

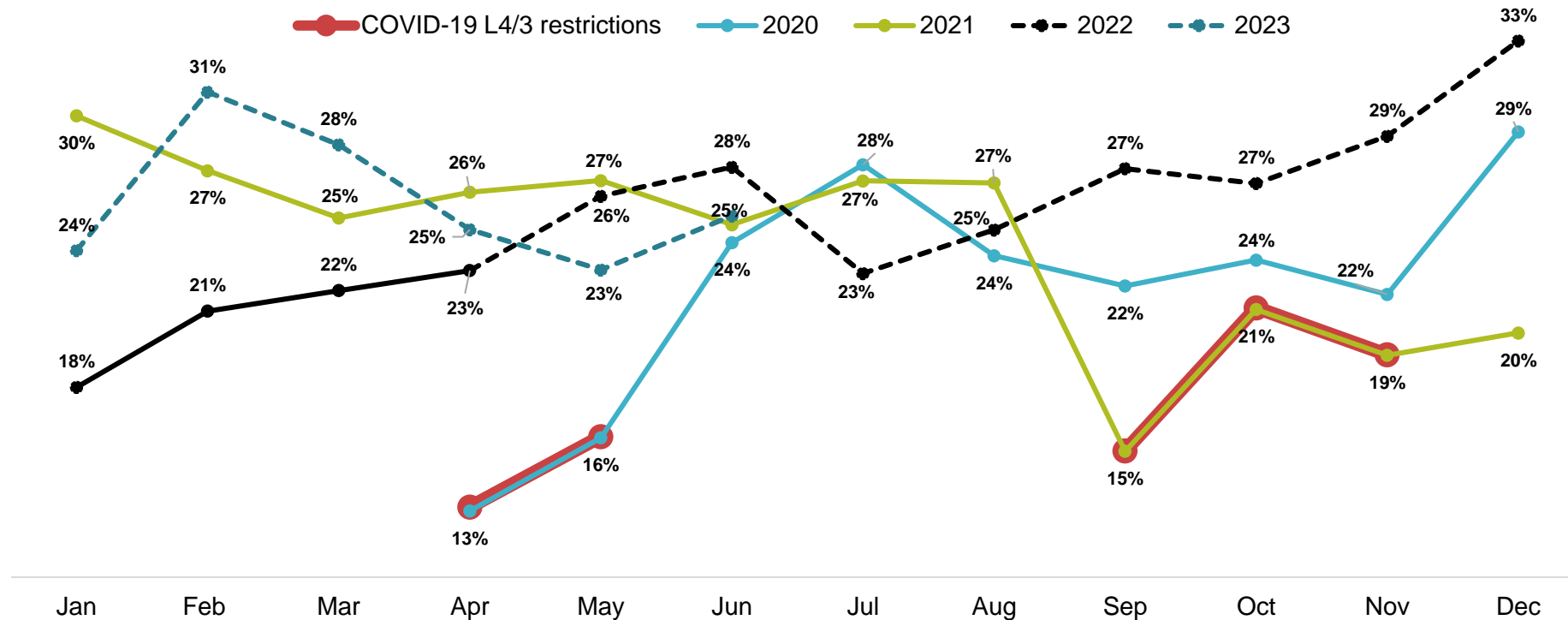


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, all adults Apr-20 – Jun-23 (n=between 500 and 2,086)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Reported weekly users, year-on-year

Reported weekly PT usage in Q4 of 2022 far exceeded comparable quarters in COVID-impacted years and February 2023 usage was up 10 points on the preceding year. Autumn/winter PT usage has been similar under half-price fares compared to COVID-impacted years.



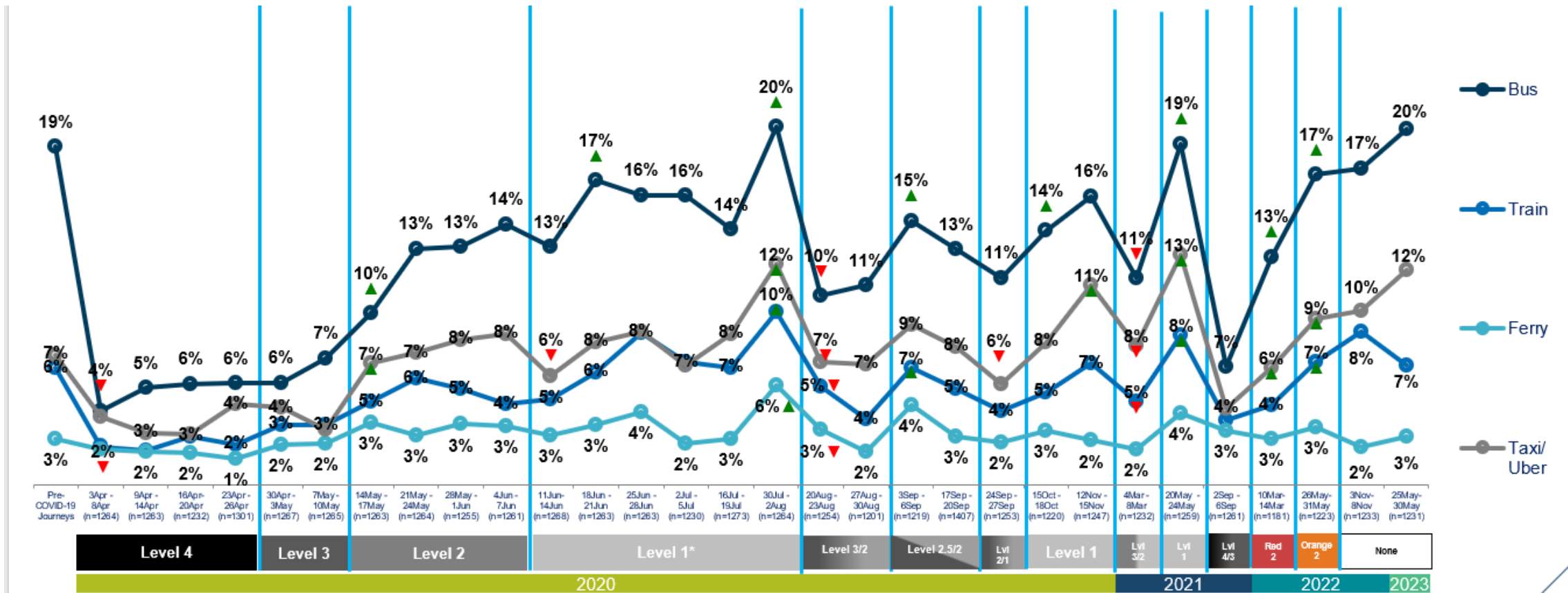
NB: dotted line indicates Half Price Fares in effect

QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, all adults Apr-20 – Jun-23 (n=between 500 and 2,086)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Reported weekly usage against pre-COVID

Evidence from May 2023 COVID-tracking also shows that the proportion reporting weekly usage had matched the pre-COVID benchmark for buses, trains and ferries.

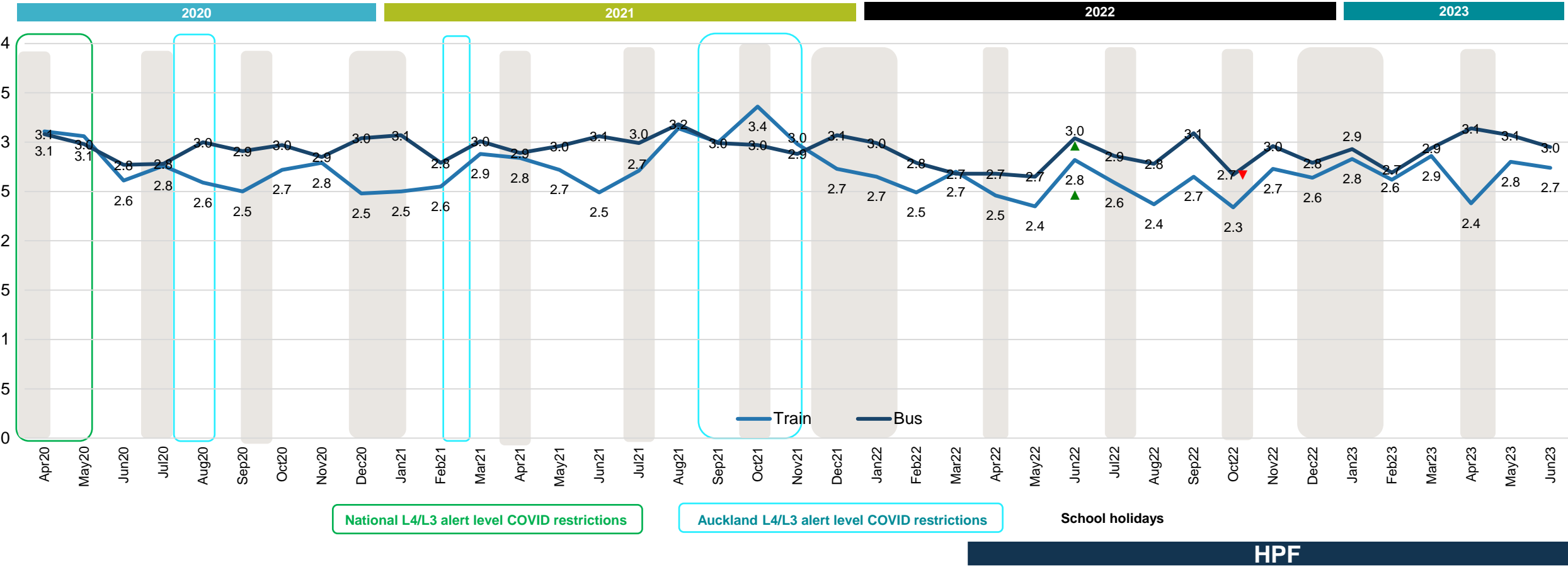


QFREQ1/QFREQ2 –And in the course of a normal week, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?
 Base: COVID-19 impact tracking, all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 30 (n= between 1,181 – 1,407)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Number of days travelled per week

Whilst some HPF periods have seen more New Zealanders reporting weekly PT usage, those users do not appear to be travelling any more days each week.

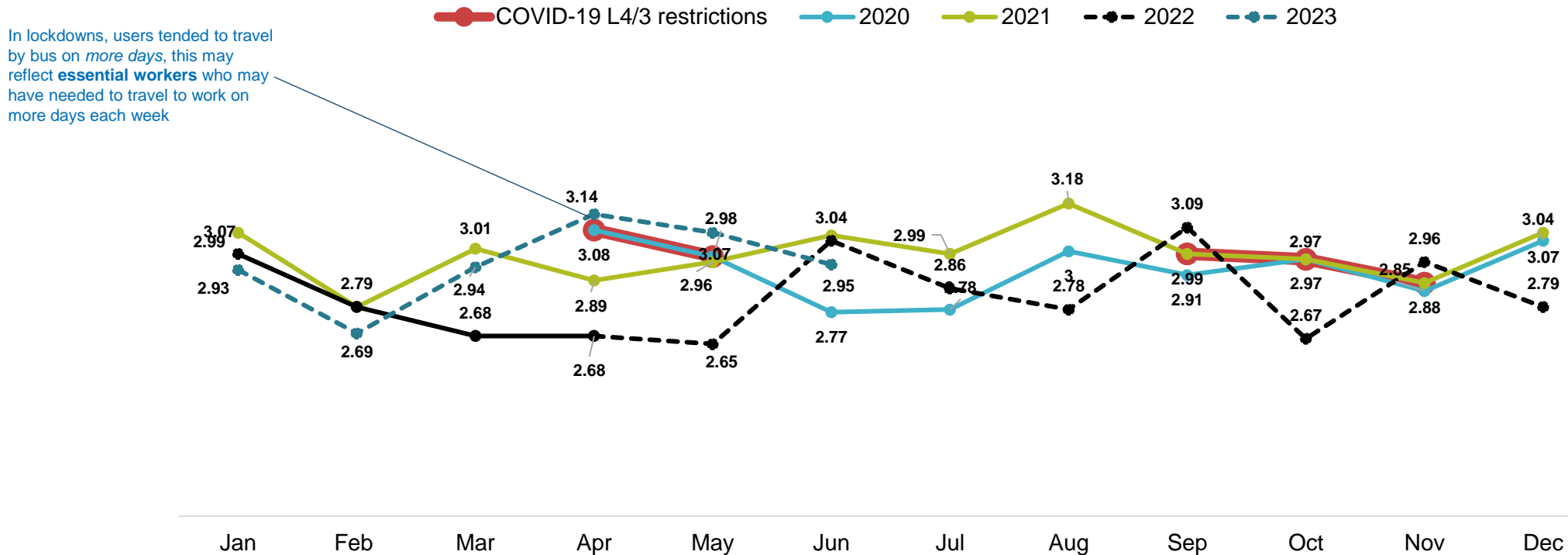


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, Users of each mode each month; Train (n=55-192); Bus (n=117-410);
 NB - Ferry journeys suppressed from analysis due to low base sizes

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Reported bus days travelled, year-on-year

Despite more users in Q4, the average days per user has not been any higher. This could indicate the addition of more occasional users, one-off trips and discretionary travel.



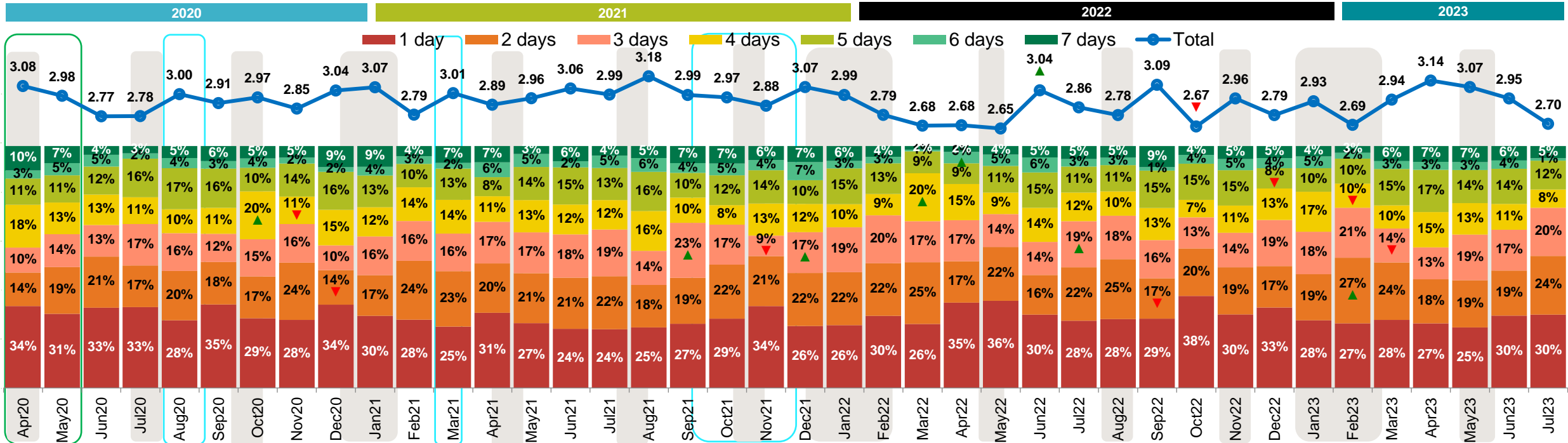
NB: dotted line indicates Half Price Fares in effect

QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, all bus users, Apr-20 – Jun-23 (n=between 117-410); weekly usage frequency not collected before April 2020

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Number of days travelled per week – bus

During the first lockdown in April 2020, 42% of bus users used the mode for 4 days or more. There have only been two months since where that many users were travelling by bus for 4 days+, December 2020 and then again in April 2023, after a full year of half-price fares.



National L4/L3 alert level COVID restrictions

Auckland L4/L3 alert level COVID restrictions

School holidays



QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, Users of each mode each month; Train (n=55-192); Bus (n=117-410);
 NB - Ferry journeys suppressed from analysis due to low base sizes

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Travel days against pre-COVID behaviour

Evidence from the May 2023 COVID-19 impact tracker shows a similar pattern. Bus and train users reported around half a day less of travel by each mode when compared to the pre-COVID benchmark.

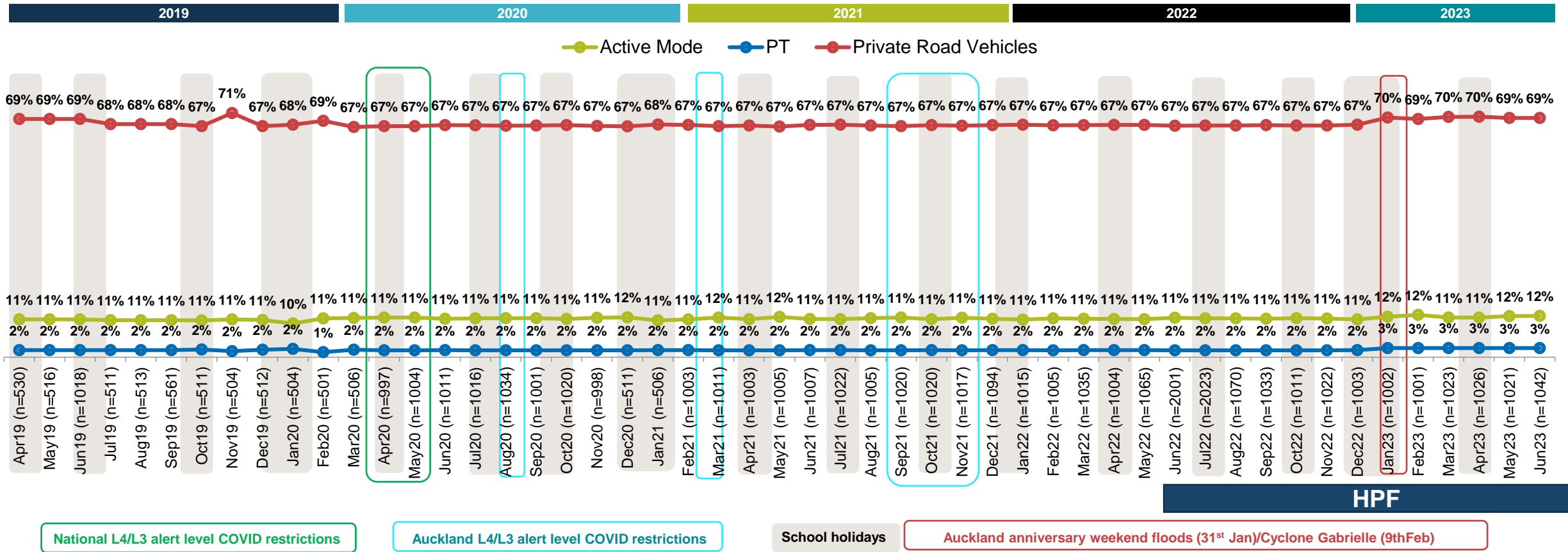


QFREQ2 –And during the past seven days, on how many days have you travelled via each of the modes listed below?
 Base: all adults 15+ in New Zealand in who used each mode in the past week: NZTA COVID Impact tracking Wave 1 – 30 (n= between 1,181 – 1,407)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Share of mode use in most recent journey

Mode choice on most recent journeys has varied little over the past 3 years, with private vehicles dominant. Since the start of 2023, PT share has increased by 1-point, with private vehicle usage also up compared to previous years.



Q26new Main mode used in recent journey (mode groups only, taxi/uber and past week non-travellers not shown)
 Base: Journey Monitor data, all adults Apr-19 – Jun-23 (n=between 500 and 2,086)
 NB: PT user base in April 2020 n=28, data suppressed as too low for reliable analysis

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Section summary

Users on the network

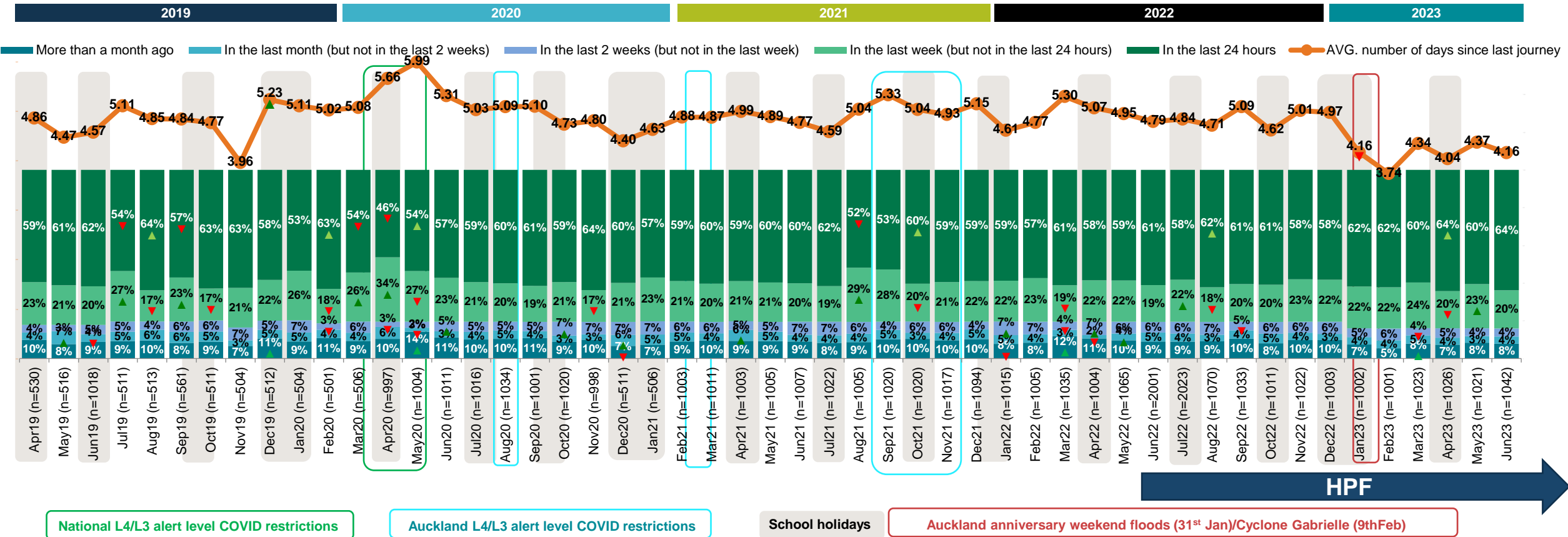
- There are indications that under half-price fares, new users have been added to the public transport network.
 - December of 2022 saw reported weekly users peak at 1-in-3 New Zealanders, not only exceeding Decembers 2020 and 2021, but also the highest level of reported weekly usage since measurement began.
 - In addition, COVID-19 impact tracking in 2022/2023 saw reported weekly PT users match the pre-COVID benchmark for buses, trains and ferries.
 - Since the start of 2023, the proportion using PT as their main mode in their most recent journey has risen from 2%-3%. There has been a simultaneous increase in private vehicle choice, with some shift away from other modes like taxis and ubers.
- Some of these may be returning users who ceased PT usage during COVID, whilst others may be entirely new users on the network.
- However, there has been no clear increase in the number of *days* that each user travels by bus, train or ferry.
 - Other mitigating factors could prevent broader adoption and there may be longer term changes in travel patterns which decrease frequency of PT mode usage.

Drivers of PT adoption and mitigating factors

Stated impact of half-price fares

Total levels of travel

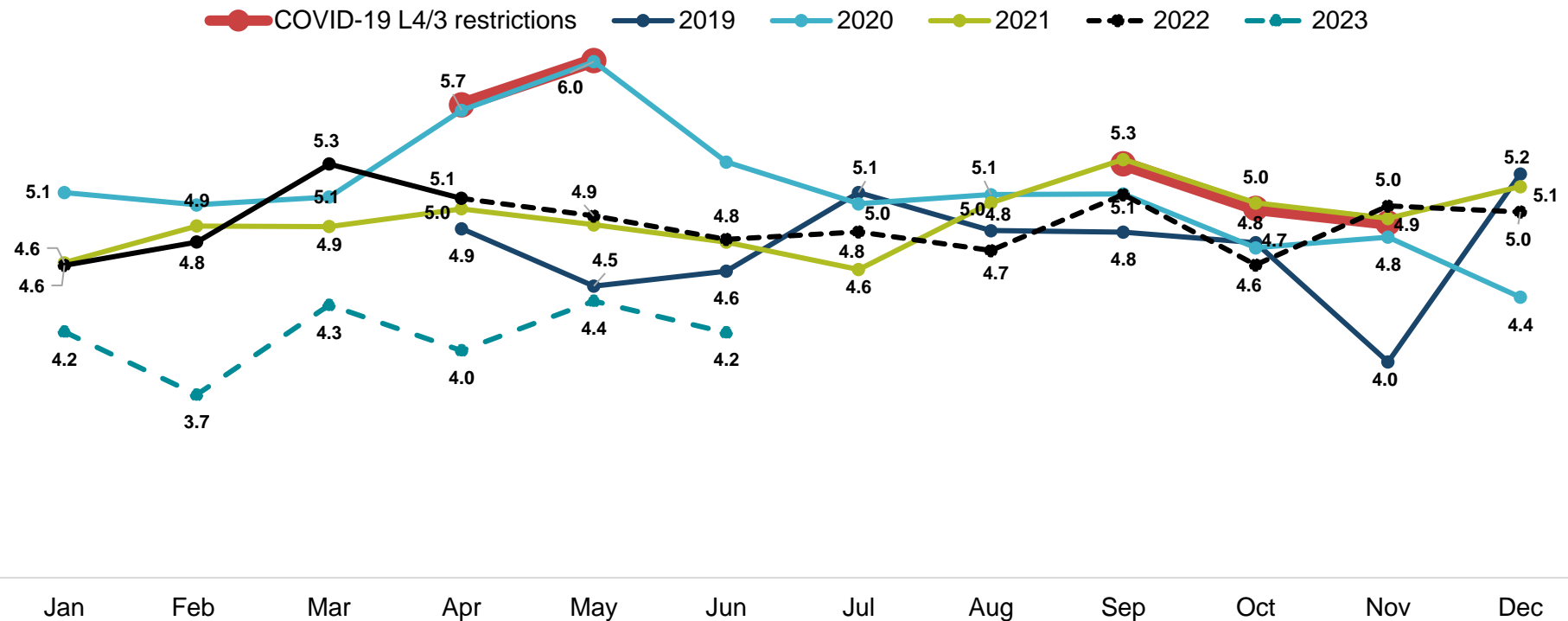
Actual rates of travel in early 2023 have been higher than in 2019, with the proportion reporting travel in the past 24 hours consistently above 60%.



Q10 When did the most recent journey you have completed take place?
 Factors used to calculate mean number of days since last travel: More than a month ago (30 days), In the last month (15 days), in the last 2 weeks (10.5 days), in the last week (3.5 days), in the last 24 hours (0 days) – Note, for past week users, average days since travel between 0.75 and 2 days.
 Base: Journey Monitor data, all adults Apr-20 – Jun-23 (n=between 500 and 2,086)

Days since last journey, year-on-year

On average, there are now fewer days between journeys for most New Zealanders than at any time since measurement began. Frequency of travel in 2022 was largely comparable to 2019, suggesting some return to normal travel patterns.



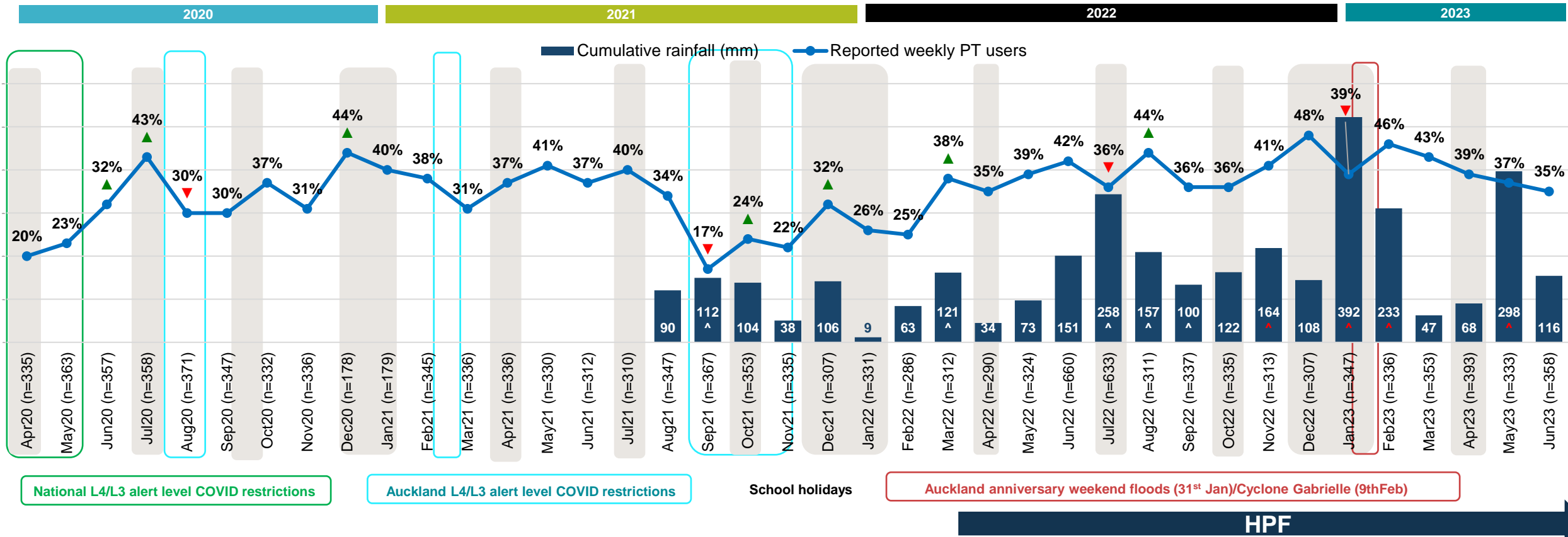
NB: dotted line indicates half-price fares in effect

Q10 When did the most recent journey you have completed take place?
 Base: Journey Monitor data, all adults Apr-20 – Jun-23 (n=between 500 and 2,086)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Auckland events

Stated weekly PT usage in Auckland steadily increase through 2022, with HPF in effect. Declining usage is common in January holidays, but reported usage has fallen by 11-points since major weather events impacted the city in January and February.



National L4/L3 alert level COVID restrictions

Auckland L4/L3 alert level COVID restrictions

School holidays

Auckland anniversary weekend floods (31st Jan)/Cyclone Gabrielle (9th Feb)

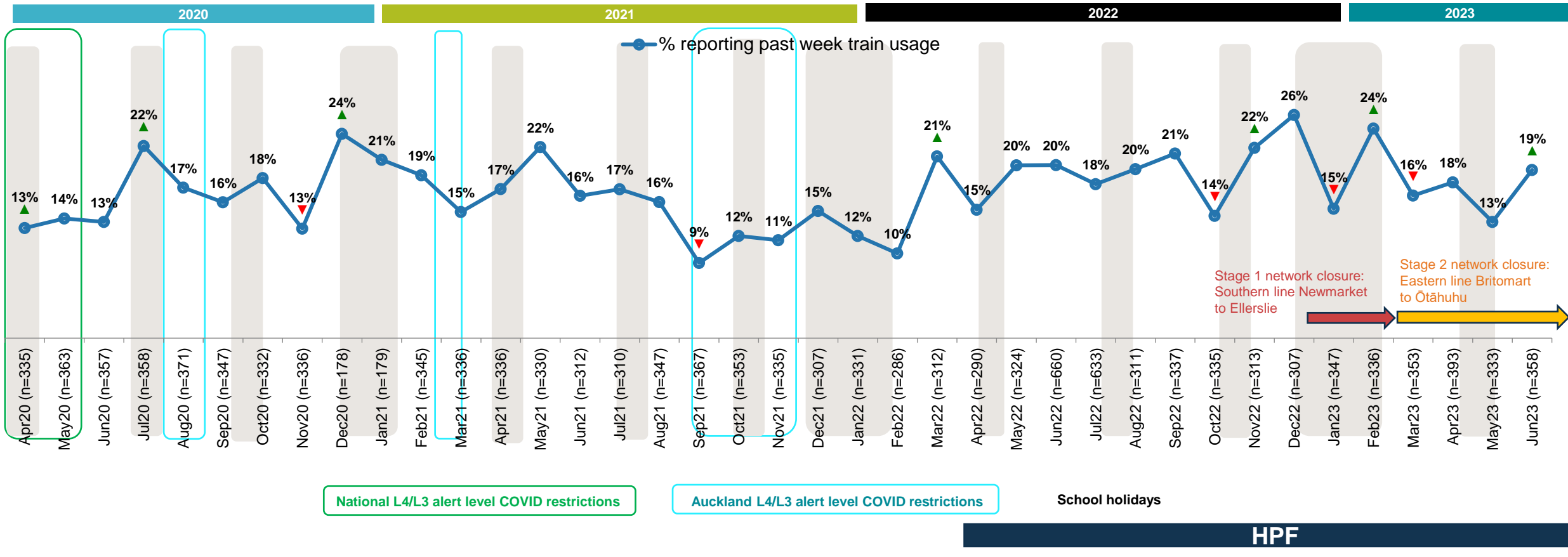
HPF

QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, all adults in Auckland Apr-20 – Jun-23 (base in x-axis)
 Cumulative rainfall data from metservice past weather data Auckland Airport (<https://www.metservice.com/towns-cities/locations/auckland/past-weather>)

- ▲ Indicates rainfall 50% or more above long term average
- ▲ Indicates rainfall 100% or more above long term average
- ▲ Indicates a statistically significant increase from preceding time period
- ▼ Indicates a statistically significant decrease from preceding time period

Auckland train network closures

Aucklanders typically account for 57% of reported weekly train users. 2023 rail network closures will cause some to shift onto replacement bus services, but users may adapt in other ways to this disruption. Reported train usage in the March – June 2023 period did not show consistent user growth.

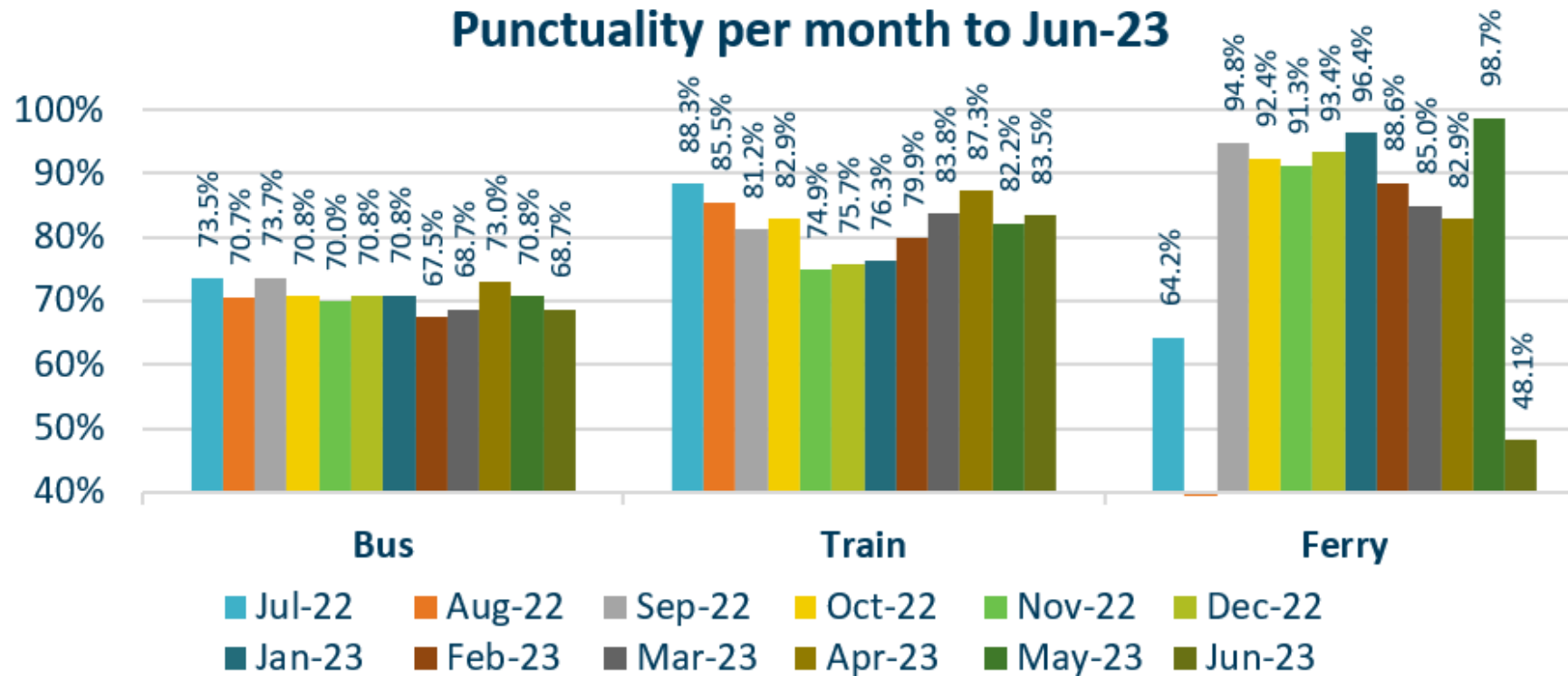


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, all adults in Auckland Apr-20 – Jun-23 (base in x-axis)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

General disruptions – punctuality

In July 2022, the proportion of weekly PT users began to steadily increase. As more users began using services, there were some declines in train punctuality, which didn't begin to recover until year end. Bus punctuality remained at around 70% during this time. This may have meant new users encountering a less punctual service, which may have prevented some from adopting more regular usage long term.

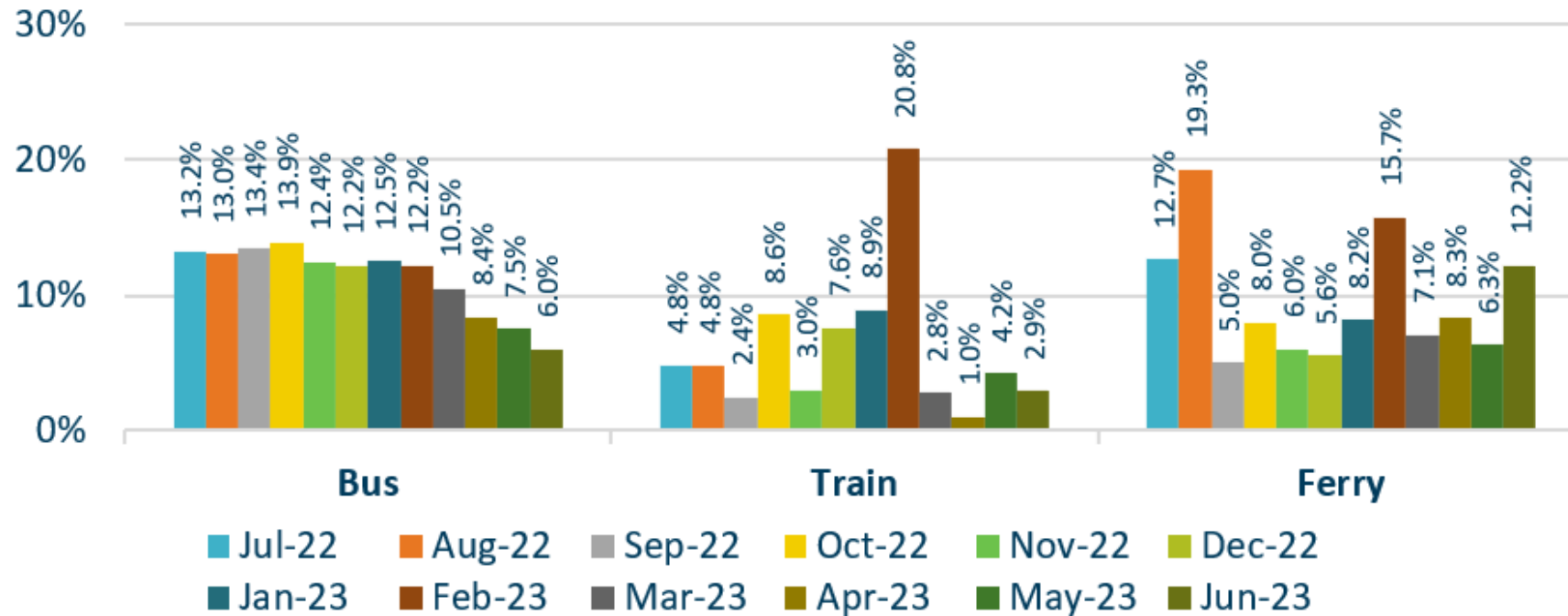


Punctuality data

General disruptions – cancellations

During this same period of increased PT usage, bus cancellations remained steady around 12-13%, though these have steadily declined through 2023. There have been some peaks in train and ferry cancellations, although cancellations due to extreme weather events in Auckland would have coincided with disruption to other services and guidance to limit travel in general.

Cancellations per month to Jun-23



Cancellation data

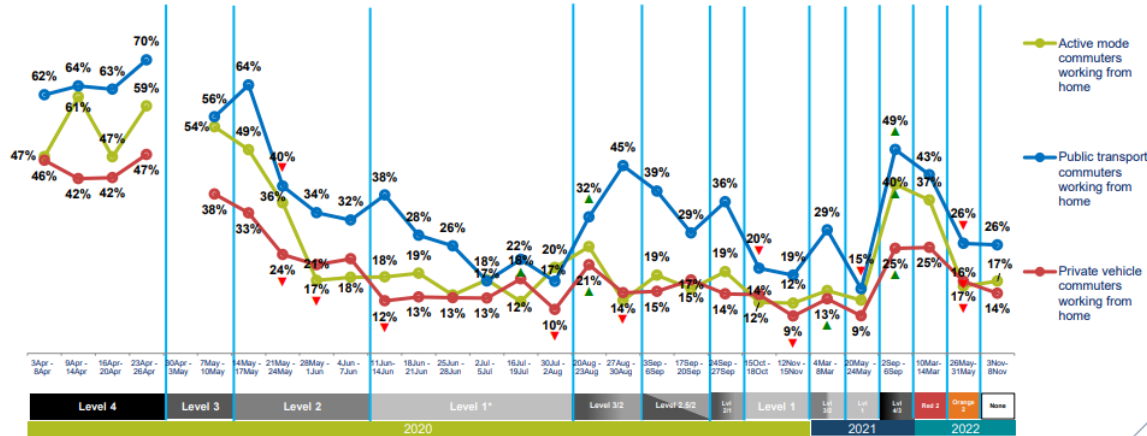
▲ Indicates a statistically significant increase from preceding time period
▼ Indicates a statistically significant decrease from preceding time period

Working from home

Existing evidence from COVID-19 impact tracking has consistently shown a loss of PT commuters as a result of working from home, with more than 1-in-6 pre-COVID commuters now working from home for some or all of the week. However, PT commuters have also been lost to mode shift and commuters moving out of the workforce or reducing their hours.

A quarter of workers who commuted by PT before COVID are working from home for most of their working week, almost double the rate for private vehicle commuters

Proportion working from home by usual commuting mode



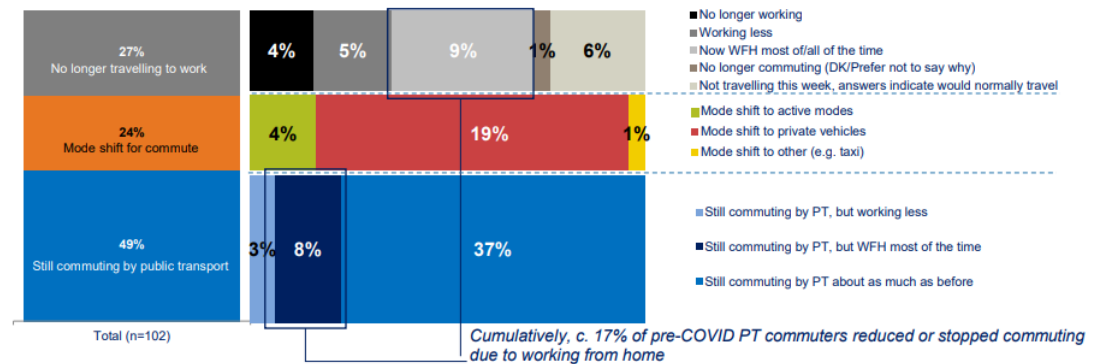
QWORK1A/QWORK2A: And prior to any public health alert or lockdown, where did you mainly work? And where do you currently work?
Base: all adults 15+ in New Zealand who would have travelled to work in a typical pre-COVID week

WAKA KOTAHI RESEARCH
Indicates a statistically significant increase from previous time period
Indicates a statistically significant decrease from previous time period

New Zealand Government

There has been a shift away from PT by pre-COVID commuters, some of which may have been offset by new commuters, but WFH is not the only factor

Past week activity of pre-COVID PT commuters – rebased to all



QFREQ1/QFREQ2 – And in the course of a normal week during March 2020, before the outbreak of COVID-19 in New Zealand, on how many days would you normally travel via each of the methods listed below? And during the past seven days, on how many days have you travelled via each of the modes listed below?
Base: all 15+ in New Zealand who would have travelled to work by public transport in a typical pre-COVID week (n=102) 2022 responses only

Cumulatively, c. 17% of pre-COVID PT commuters reduced or stopped commuting due to working from home

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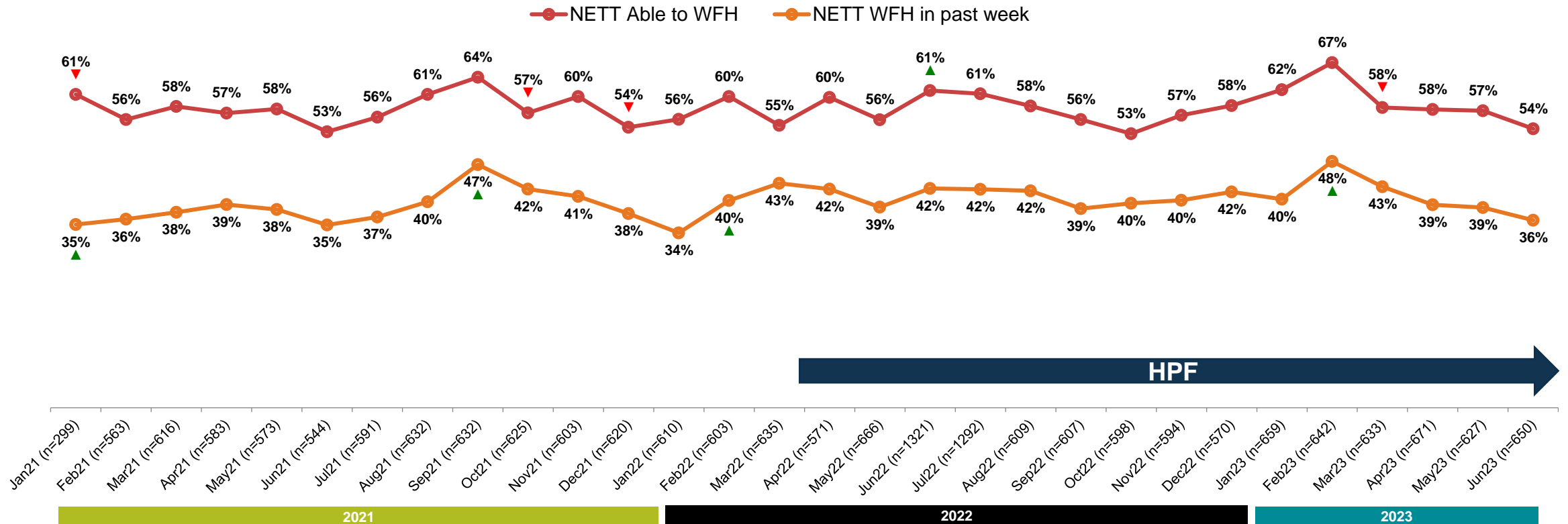
New Zealand Government

COVID-19 impact tracking, working from home deep dive November 2022
Published data available at <https://www.nzta.govt.nz/resources/covid-19-impacts-on-transport/>

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

Working from home

At present, the majority of working adults report that they are able to work from home, but this activity has generally been less common in 2023 than it was throughout 2022. The significant peak in this activity in February 2023 corresponds with major weather events in Auckland, which meant some employers encouraging working from home due to commuting challenges and damage to business premises.

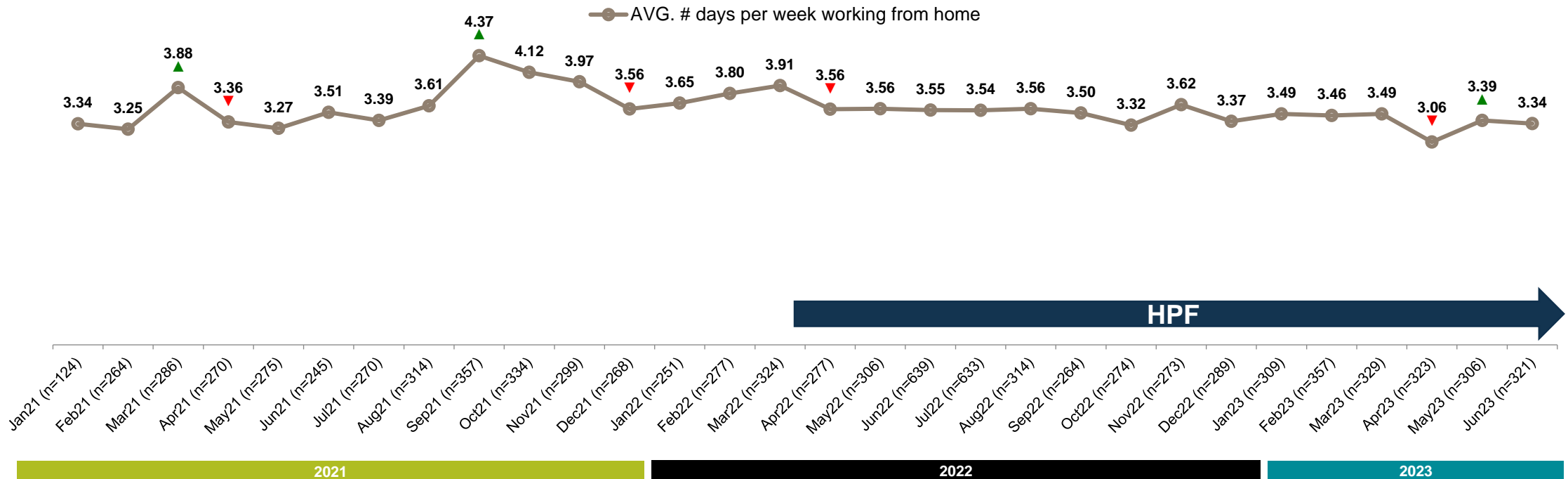


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, all working adults, base in x-axis

▲ Indicates proportion is higher than total sample to a statistically significant extent
 ▼ Indicates proportion is lower than total sample to a statistically significant extent

Working from home

Those working from home have done so at a relatively consistent frequency since the start of 2022, for about three and a half days per week. In April, those working from home did so for significantly fewer days, and this has remained at 3.4 days or fewer for much of Q2. There may be some reduction in WFH frequency coming, but it still remains consistent with the past couple of years.

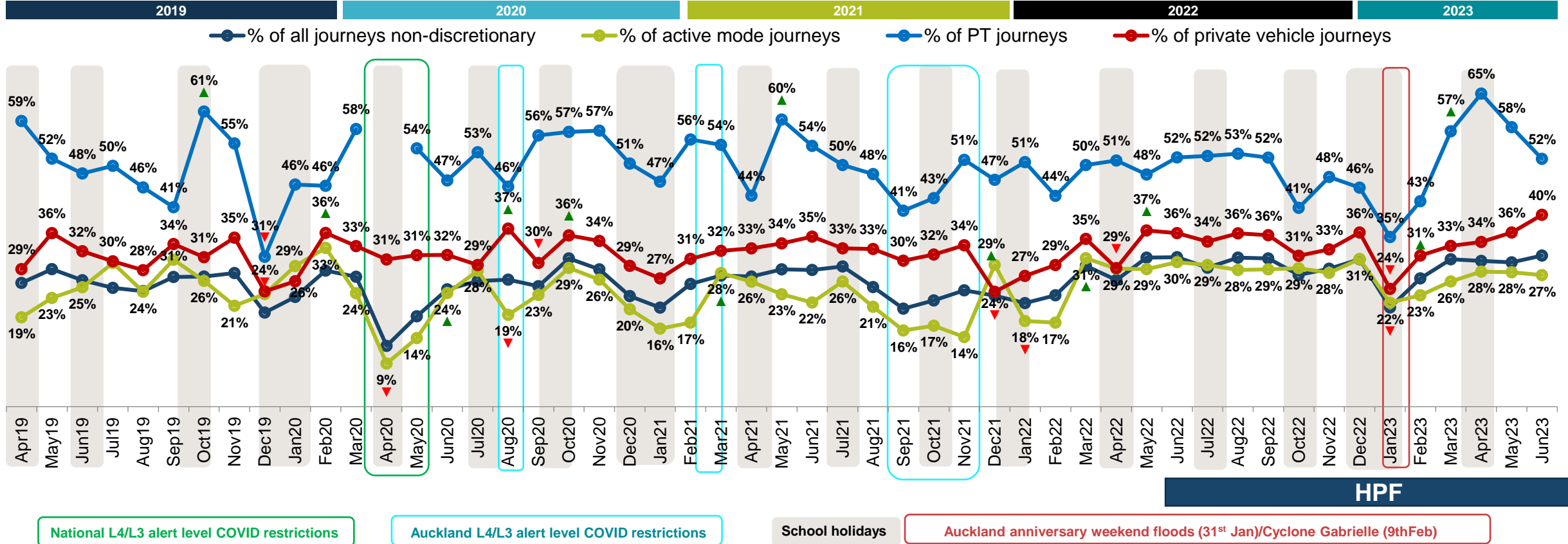


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each/ average number of days selected
 Base: Journey Monitor data, all adults working from home in the past week.

▲ Indicates proportion is higher than total sample to a statistically significant extent
 ▼ Indicates proportion is lower than total sample to a statistically significant extent

Non-discretionary travel

Travel for work related purposes has generally accounted for the majority of PT journeys, but this particular travel has been more impacted by increased rates of working from home. Work travel peaked as a share of PT journeys in April 2023, but as this has declined towards during quarter 2, these journeys have accounted for an increasing share of private vehicle journeys.



Q21 Main purpose of most recent journey

Base: Journey Monitor data, all adults travelling by each mode for most recent journey: All travellers (n=501-2,023) Active modes (n=83-342);

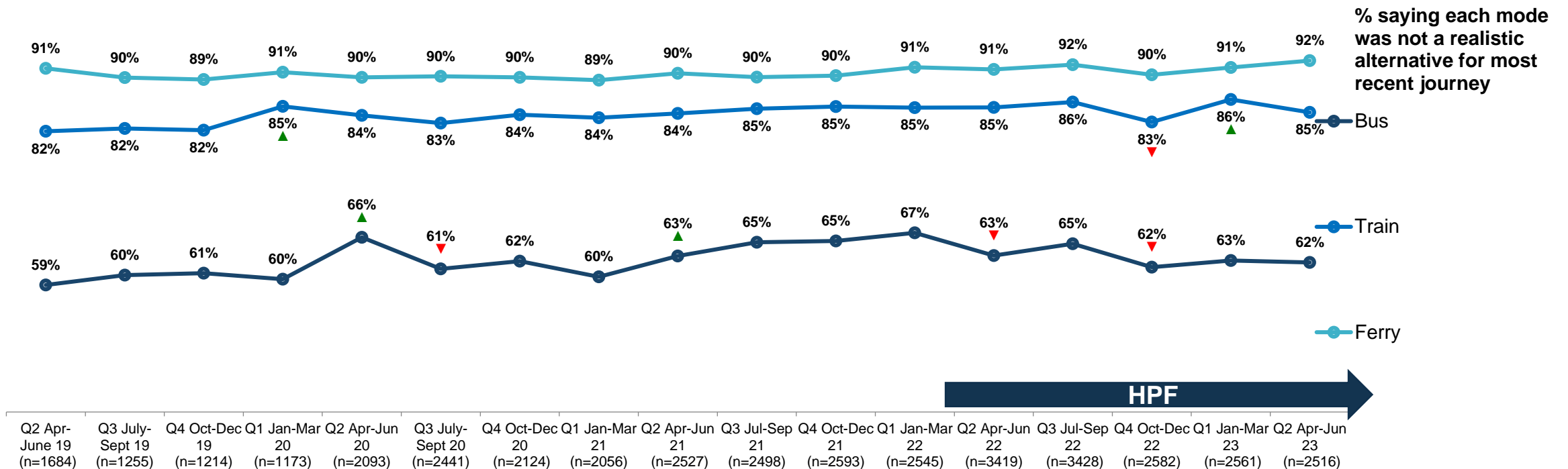
Public Transport (n=42-231); Private Vehicle (n=234 - 1,147)

NB: PT user base in April 2020 n=28, data suppressed as too low for reliable analysis

▲ Indicates a statistically significant increase from preceding time period
▼ Indicates a statistically significant decrease from preceding time period

Public transport feasibility

The perceived feasibility of PT modes as an alternative mode for journeys remains low, most New Zealanders do not live or travel in areas where ferries or trains are used, but even with the greater reach of the bus network, more than 3-in-5 New Zealanders don't see this mode as a realistic option.



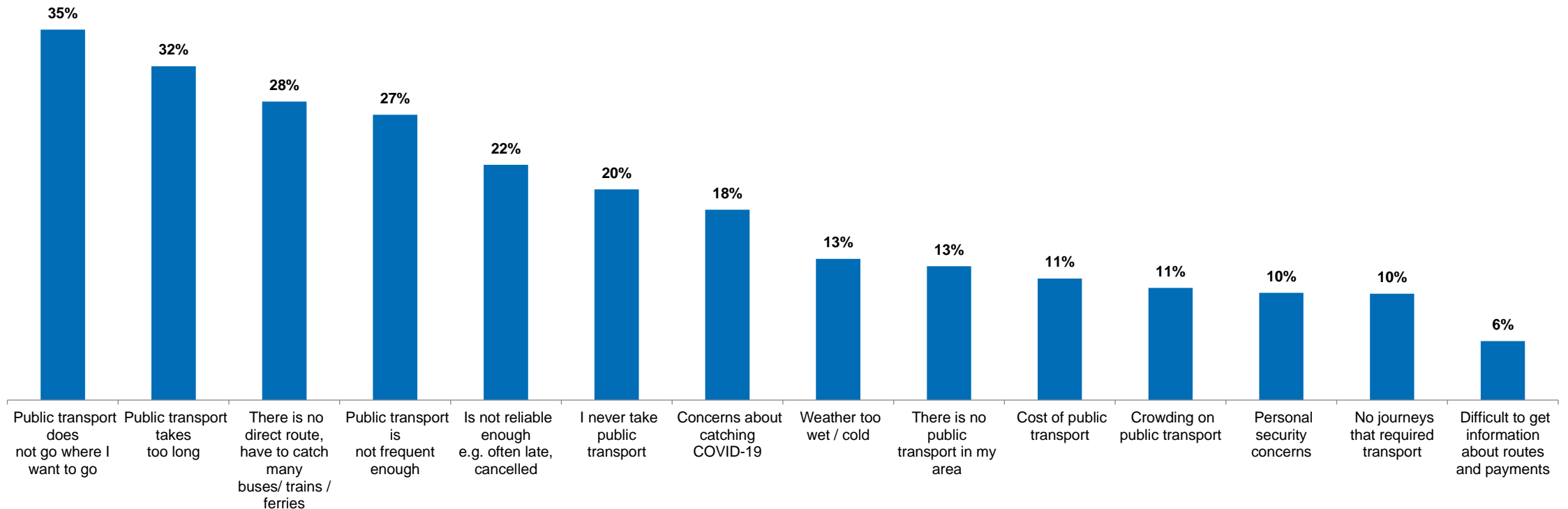
Q53. To what extent were each of these alternatives an option for you for that part of your journey.
 Base: all making a journey within the past week, Journey Monitor survey Apr-2019 to June-23 (base in x-axis)

NB modes are rated on a 0 to 10 scale where 0= simply was not an option and 10 = a very realistic option. Realistic is analysed as all giving an 8-10 score, with 0-2 used for not realistic.

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Barriers to PT uptake

Practical considerations have been the most common barrier to adding PT users during the time that HPFs have been in effect. Cost is only a barrier to 1-in-10 non-users who have PT available in their area and reduced fares cannot solve for potential users when the routes available don't serve their required destinations, take too long to reach them or have too many legs for that route.

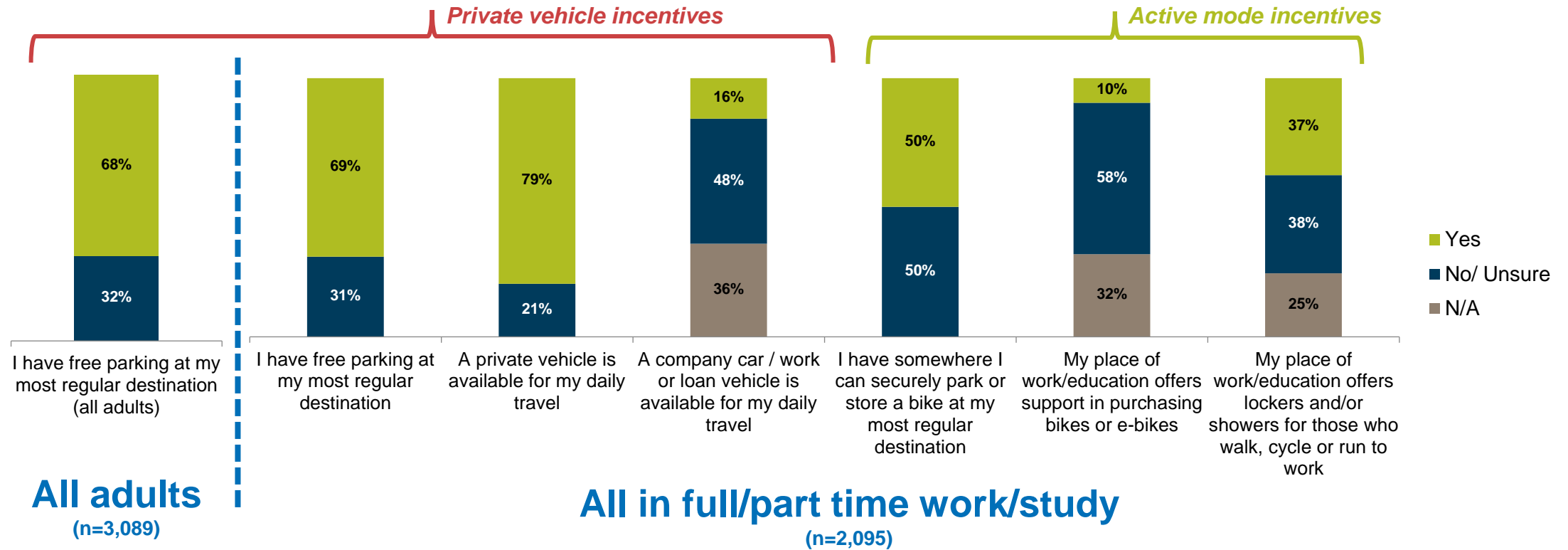


Q54d7New. What has stopped you from taking train , bus or ferry for your journeys in the past week
 Base: all past week non-PT users who indicated that at least 1 PT mode was available to them, Journey Monitor survey
 June 2022 – March 2023 (n=4,612)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Factors incentivising other modes

Whilst HPFs may encourage PT usage, there are other factors that make alternative modes more feasible or attractive. Most New Zealanders in work/study have access to a private vehicle, whilst 7-in-10 have free parking at their most regular destination. Incentives to active modes are a little less common, with only half having access to secure bike storage at their most regular destination, but 1-in-10 can access help to purchase bicycles.



Q53. To what extent were each of these alternatives an option for you for that part of your journey.
 Base: all adults 15+ in New Zealand, Q2-2023 (n=3,089); all in work/study (n=2,095)

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Section summary

Context and mitigating factors

- Since 2020, COVID-19 travel restrictions have limited usage of the public transport network. With these restrictions no longer in place, 2022 and 2023 have shown an increase in network *users* but not number of days travelled.
- Part of the increase in users may come from more frequent travel, with New Zealanders going fewer days between journeys on average, and the proportion travelling in the past 24 hours consistently above 60% since the start of 2023.
- However, the beginning of 2023 has seen some disruptions that could prevent growth in network usage, particularly in Auckland where the largest proportion of NZ PT users live.
 - Above average rainfall and extreme weather events impacted the city at the start of 2023. Whilst reported weekly usage in the city peaked in January, it has declined steadily in the months following significant weather disruptions and damage to the network.
 - In addition, train network upgrades in Auckland have been taking place throughout 2023, with periods of closure on certain lines. Train usage has remained between 13% and 24% during this time and was significantly lower in March-May 2023 compared to 2022.
- There has been consistent evidence that PT usage is disproportionately impacted by working from home. PT commuters have been reduced since COVID, with some reducing their working hours and about 1-in-6 working from home at least some of the week.
 - Rates of working from home peaked in February, possibly impacted by significant weather events in Auckland. However, the share of employees reporting working from has declined steadily from that point.
 - An April peak in non-discretionary travel as a share of PT journeys occurred at a time when the average number of days working from home significantly declined. However, since this time this has declined as a share of PT journeys whilst steadily growing as a share of private vehicle journeys.

Section summary – continued

Context and mitigating factors

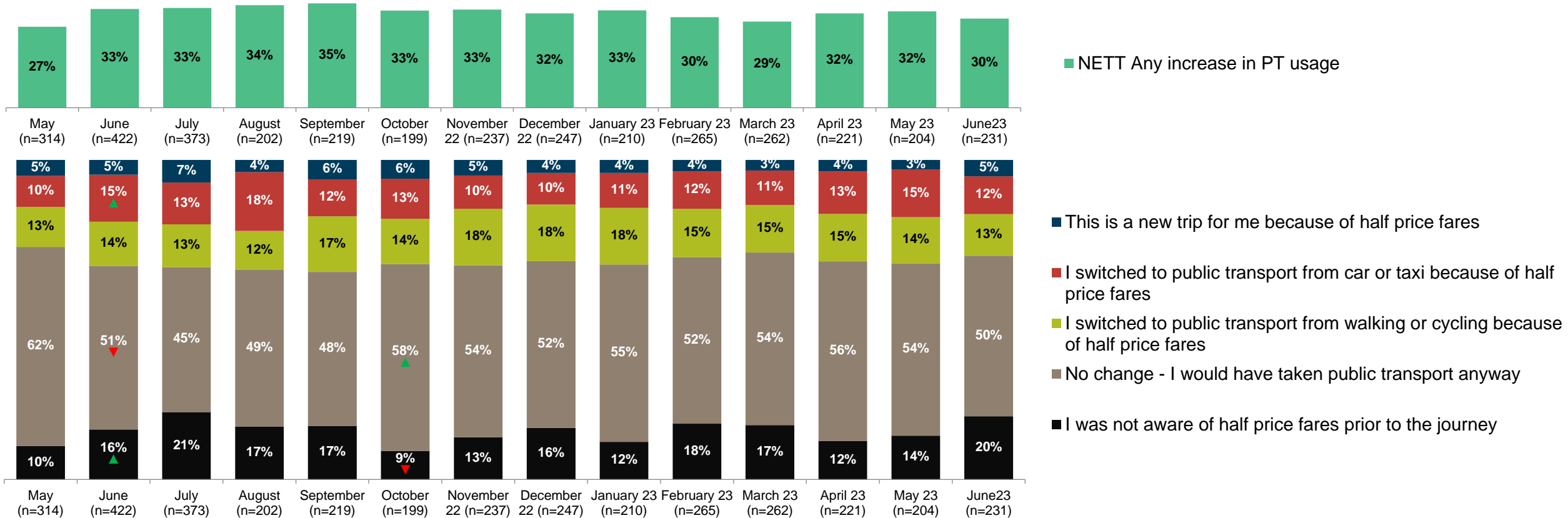
- Feasibility is a consistent barrier to PT usage, with the majority of New Zealanders travelling in the past week seeing buses, trains and ferries as unrealistic options for the journeys they need to make.
 - Potential users do not reject PT as an option because of costs. More often than not, the routes that exist simply do not serve their desired destinations, or when they do are too slow, complex, infrequent or unreliable to get them there as needed.
- It is also important to note that other incentives exist to make non-PT uses of the land transport network more attractive.
 - Most people have access to free parking at their most frequent destination and this is the case for nearly 7-in-10 of those in work or study. This significantly reduces the cost of private vehicle journeys. Meanwhile, almost 1-in-6 of those working or studying have access to a company vehicle, with 4-in-5 having access to a car or van of some sort.
 - Incentives to encourage active mode travel are slightly less common, but half of those in work or study at least have secure bike storage at their work/study destination

What new trips are being generated?

Stated impact of half-price fares

Reported PT journeys added

Since the introduction of half-price fares, consistently around a third of New Zealand public transport users have reported making journeys by PT as a direct result of half price fares. The proportion of entirely new journeys has varied from 3-7%, peaking in July 2022.



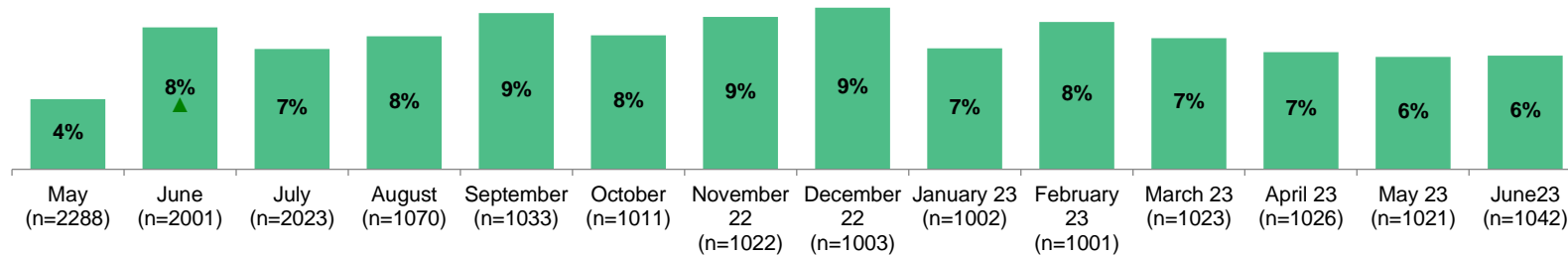
Q53d2 / Q53d3 On 1 April 2022 half-price public transport fares were introduced nationwide. Which statement best applies to your journey... / You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)...

Base: All travelling by public transport in past week, COVID-19 impact tracking May 2022, Journey Monitor survey May-22 – June-23

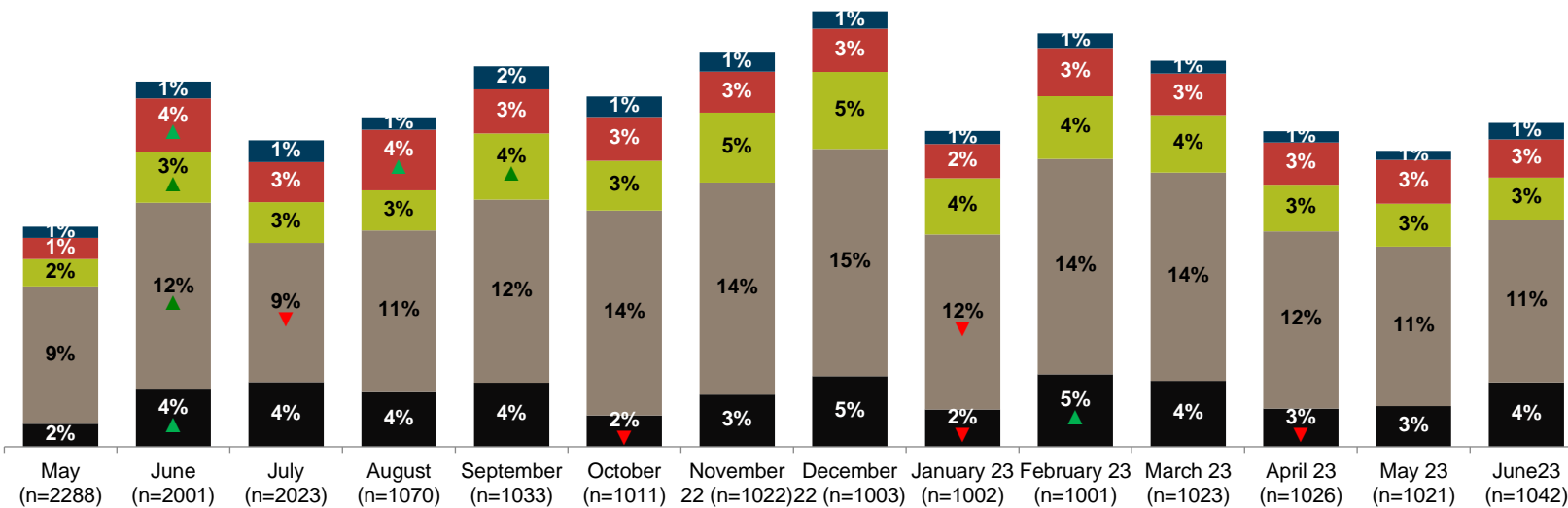
▲ Indicates a statistically significant increase from preceding time period
▼ Indicates a statistically significant decrease from preceding time period

Reported PT journeys added May '22 – Jun '23

At a total population level, this means between 4-9% of New Zealanders making new public transport journeys, with peaks in September through December 2022.



■ NETT Any increase in PT usage



■ This is a new trip for me because of half price fares

■ I switched to public transport from car or taxi because of half price fares

■ I switched to public transport from walking or cycling because of half price fares

■ No change - I would have taken public transport anyway

■ I was not aware of half price fares prior to the journey

Q53d2 / Q53d3 On 1 April 2022 half-price public transport fares were introduced nationwide. Which statement best applies to your journey.../ You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)...

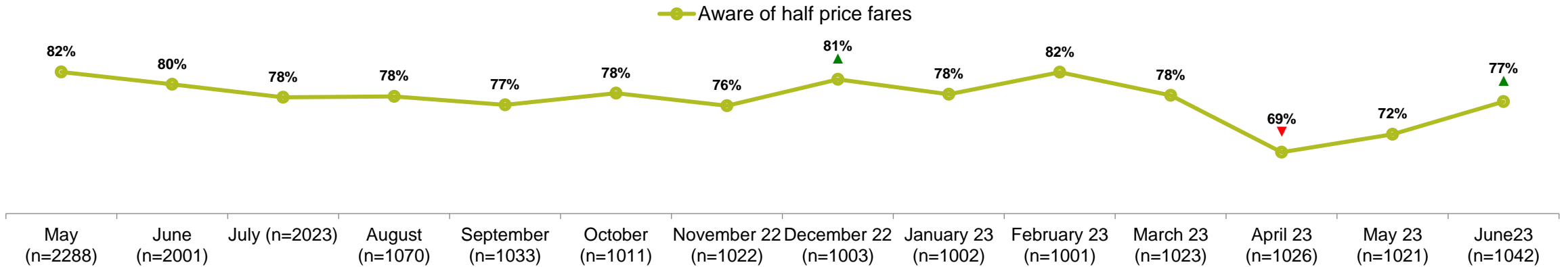
Base: All travelling by public transport in past week, COVID-19 impact tracking May 2022, Journey Monitor survey May-July 2022

▲ Indicates a statistically significant increase from preceding time period
▼ Indicates a statistically significant decrease from preceding time period

How has awareness changed?

Awareness has declined from the start of 2023, recovering significantly in June. There are a number of populations where there has tended to be a deficit in awareness, particularly among Pacific peoples, Māori, younger and lower income New Zealanders.

78%
Avg. awareness
across past 13
months



Groups with significantly lower awareness:

Age

15-24 Year olds (68%)
25-34 year olds (74%)

Ethnicity

Pacific peoples (63%)
Māori (67%)

Disability

Memory/concentration
difficulties (74%)
Any disability (76%)

Household

Shared HH, incl
flatting, living with
parents (73%)
Children at home
(76%)

Household income

\$30K or less p.a
(71%)

Area of residence

Rural area, >5km from
town (69%)
Rural area, <5km from
town (70%)
Towns (72%)

Groups with significantly higher awareness:

Age

65+ year olds (85%)
55-64 year olds (83%)

Ethnicity

Asian (86%)
European (80%)

Household

Couples w/ no children
(82%)

Household Income

\$100K+ p.a. (83%)

Area of residence

Suburbs (81%)
City Centre (80%)

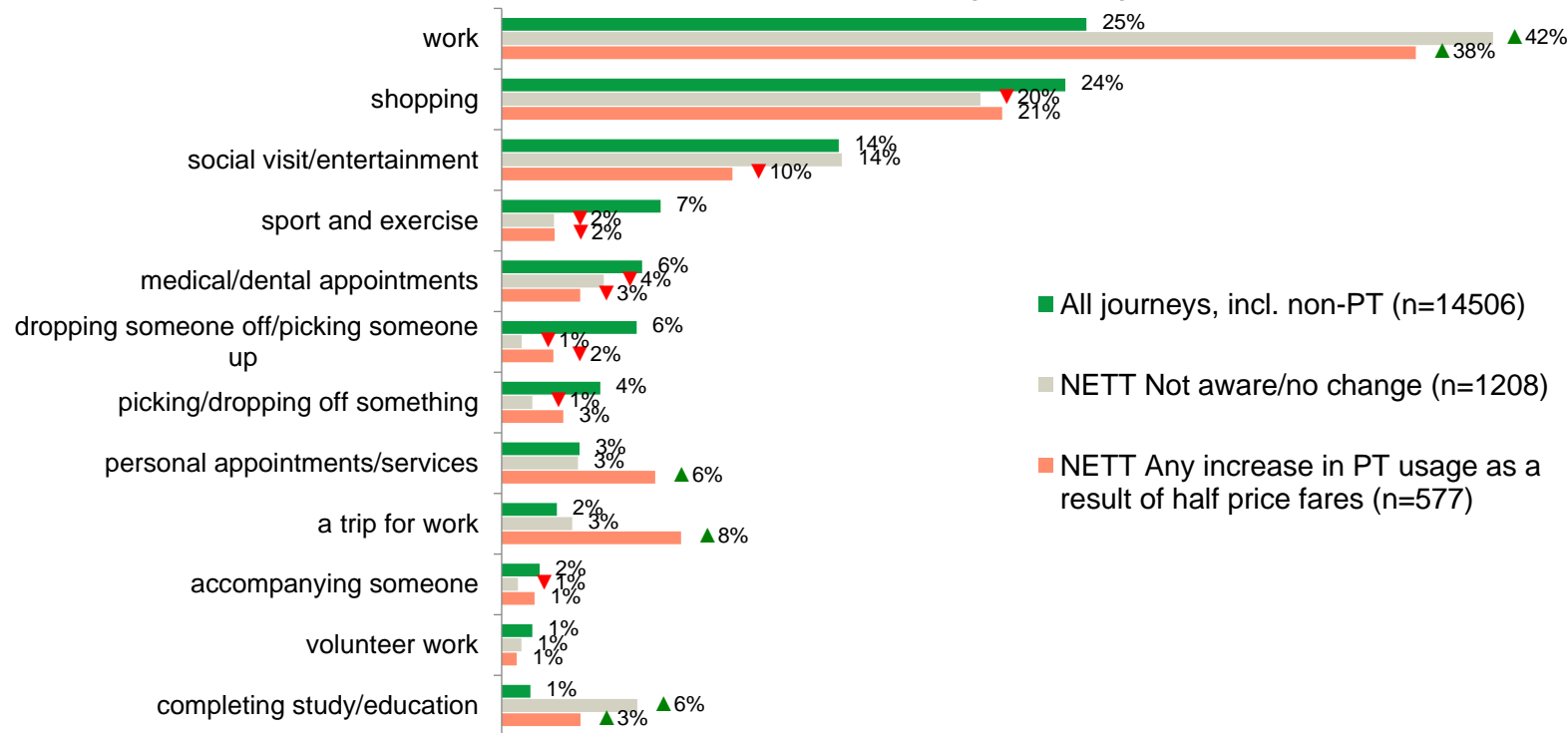
Q6 Are you aware that on 1 April 2022 half-price public transport fares were temporarily introduced nationwide?
Base: All adults 15+ in New Zealand, Journey Monitor and COVID Impact Tracking

▲ Indicates a statistically significant increase from preceding time period
▼ Indicates a statistically significant decrease from preceding time period

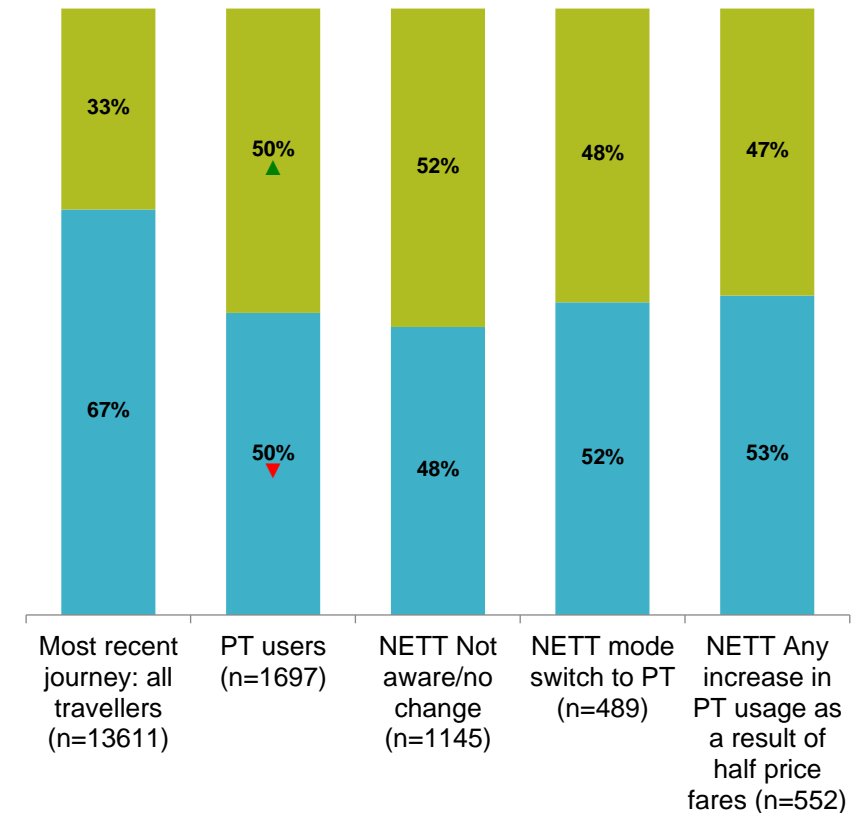
What types of journeys are we adding

Public transport tends to be used more for non-discretionary journeys, such as work, education and medical appointments. Those making journeys as a result of HPF are largely the same, but they're significantly more likely to report travelling to personal appointments compared to other travellers.

Purpose of most recent journey



Discretionary Non-Discretionary



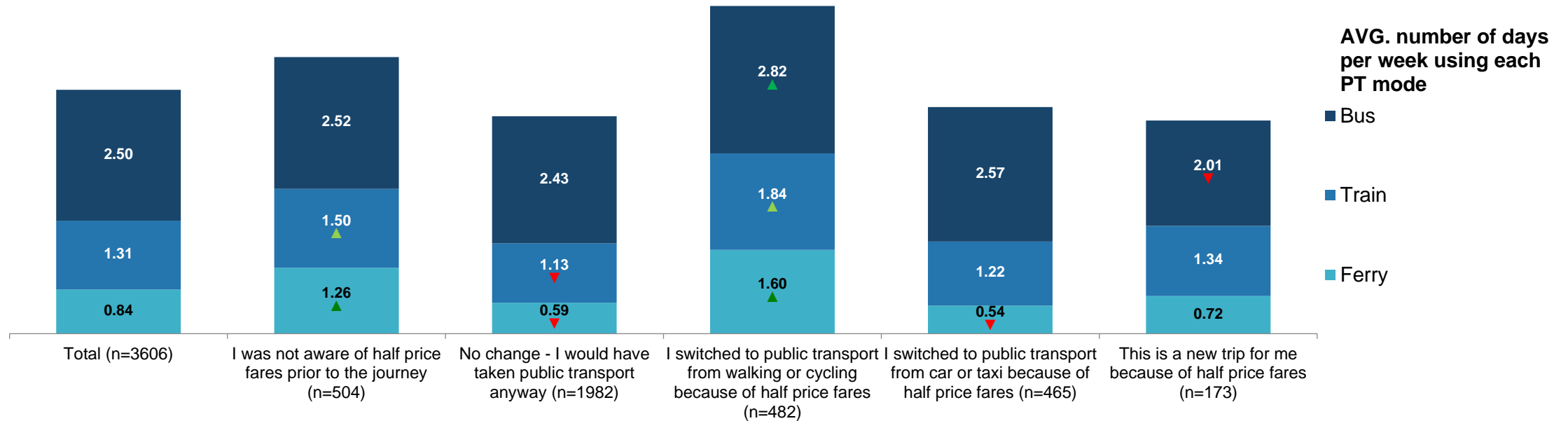
Q21/ Q53d2: What was the main purpose of this journey? / On 1 April 2022 half-price public transport fares were introduced nationwide. Which statement best applies to your journey...?

Base: All using public transport as main mode in most recent journey, Journey Monitor survey Apr-22 to Jun-23

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

Are new PT users travelling more?

Those switching from walking and cycling use each PT mode significantly more than other users, travelling by bus almost three days per week and by train almost 2 days. This may include habitual PT users who are adding journeys or travelling on more days as a result of half price fares.

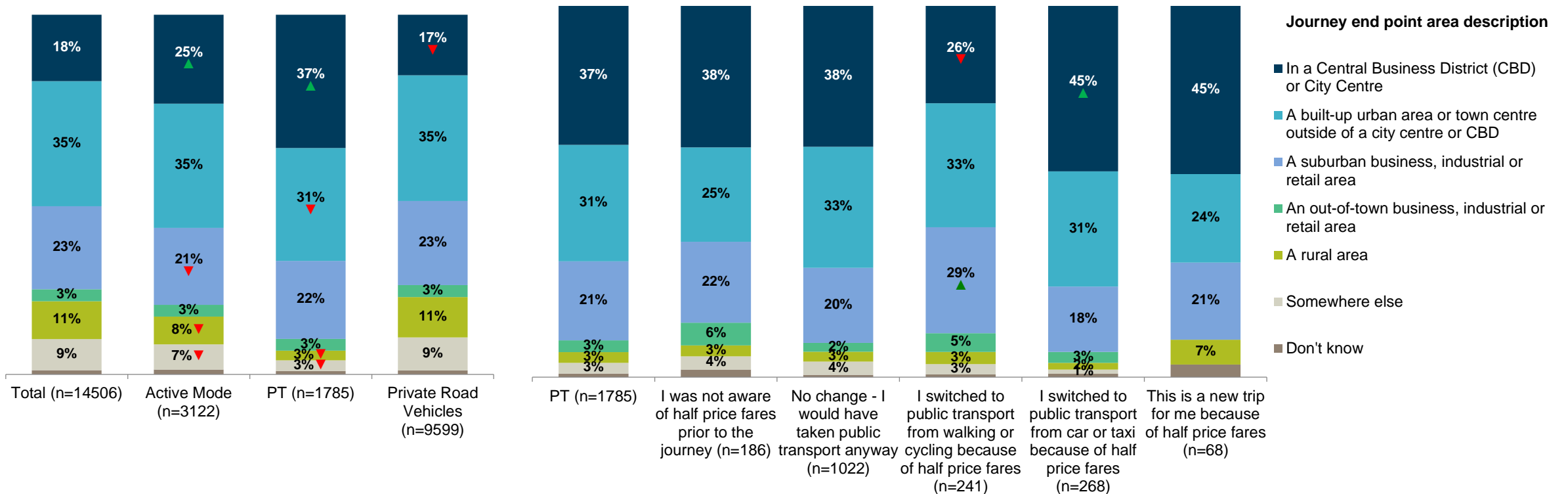


QLEGENED Which of the following best describes the location where this <Primary Mode> leg of the journey ended?
 Base: All travelling by each mode as primary mode in most recent journey, Journey Monitor survey Apr-22 to Jun-23/ Apr-21 to Mar-22

▲ Indicates proportion is higher than total sample to a statistically significant extent
 ▼ Indicates proportion is lower than total sample to a statistically significant extent

What types of journeys are we adding

PT journeys are generally more likely to end in downtown CBD areas. New trips that wouldn't have otherwise happened have similar destinations to those where a car or taxi would normally be used.

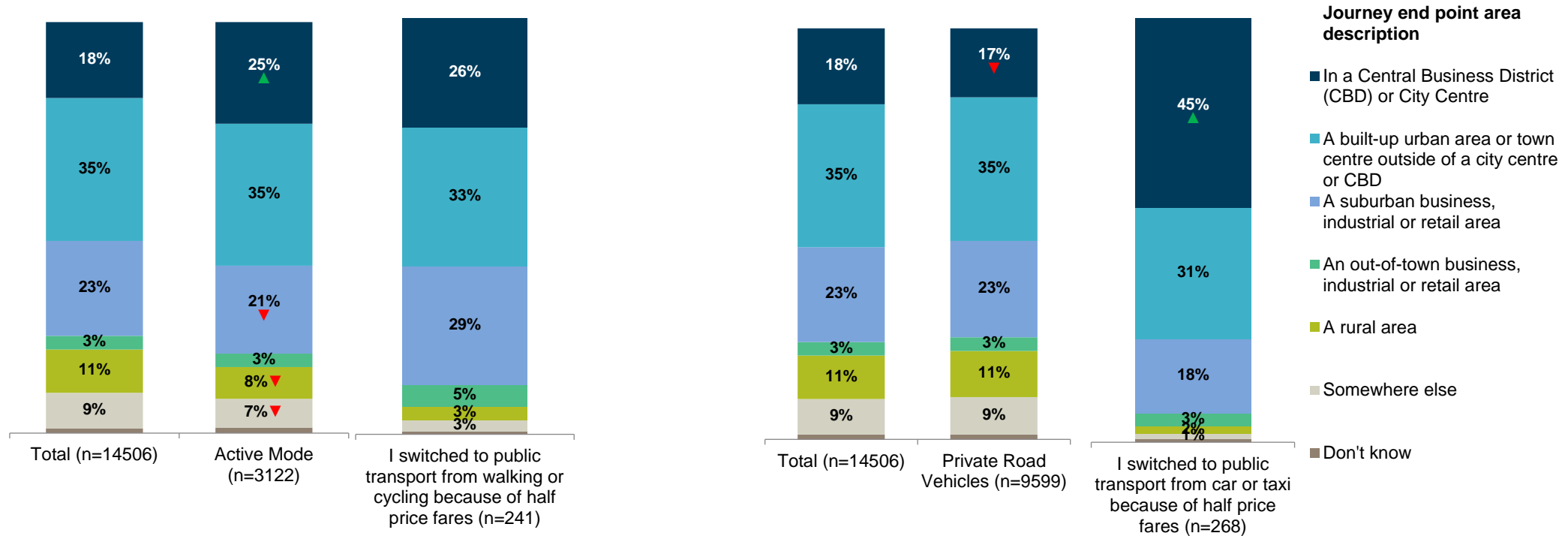


QLEGENG Which of the following best describes the location where this <Primary Mode> leg of the journey ended?
 Base: All travelling by each mode as primary mode in most recent journey, Journey Monitor survey Apr-22 to Jun-23

▲ Indicates proportion is higher than total sample/all PT users to a statistically significant extent
 ▼ Indicates proportion is lower than total sample/all PT users to a statistically significant extent

What types of mode-switching happen?

The destinations of PT journeys replacing walking and cycling travel broadly reflect active mode destinations in general. Where private vehicle users switch to PT as a result of HPFs, their destinations do not reflect the general profile of car user destinations. Instead, HPF mode switching is taking private vehicle trips out of city centres.

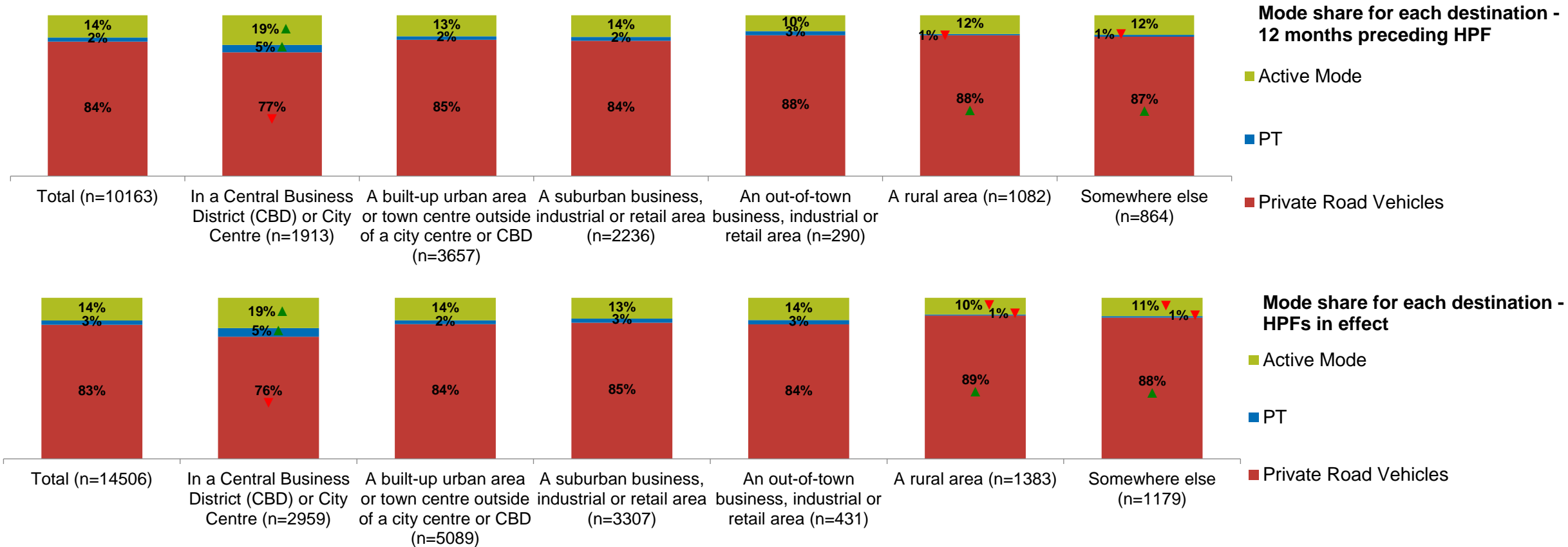


QLEGENDD Which of the following best describes the location where this <Primary Mode> leg of the journey ended?
 Base: All travelling by each mode as primary mode in most recent journey, Journey Monitor survey Apr-22 to Jun-23

▲ Indicates proportion is higher than total sample/all PT users to a statistically significant extent
 ▼ Indicates proportion is lower than total sample/all PT users to a statistically significant extent

Have mode choices changed?

However, so far, the mode choice profile for travel into each of these areas has not materially changed compared to the 12 months preceding the HPF introduction.



QLEGENG Which of the following best describes the location where this <Primary Mode> leg of the journey ended?
 Base: All travelling by each mode as primary mode in most recent journey, Journey Monitor survey Apr-22 to Jun-23/ Apr-21 to Mar-22

Section summary

Destinations and journey types

- Since their introduction, close to a third of public transport users have reported that some of their travel was a direct result of half-price fares.
 - Those travelling due to HPFs are generally travelling for the same purposes as other public transport users. Just under half of their journeys are non-discretionary, with travel to or from work the most common destination.
 - However, the proportion that are making *trips for work* as opposed to every day commuting is significantly higher than other PT users and more than double that of other travellers in general.
 - The proportion using half-price fares to make it to *personal appointments* is also significantly higher, double that of other PT users and travellers in general.
- The largest sub-group has tended to be those switching from active mode travel. Where this mode shift occurs, it is more likely to replace trips to suburban business, industrial and retail areas. This mostly reflects the usual destinations of active mode travel.
- The next largest sub-group has been switching from private vehicles. Their journeys do not reflect normal private vehicle travel, which tends to have more rural destinations. Instead, this travel is removing some car and taxi trips from New Zealand city centres.
 - This may be informed by the types of destinations served by public transport. Private vehicle users can take advantage of HPFs if driving into/within a city, but for trips out to more rural areas, an appropriate service may not always exist.
- Despite this mode-switching, the modes chosen to travel to each destination have not significantly changed compared to the 12-months preceding the introduction of half-price fares.

What mode switching is occurring and who is impacted?

Analysis of demographics within patronage and stated impact of half-price fares

Existing variations in usage

Higher usage groups

Long term, reported weekly usage of public transport was consistently above average for the following groups prior to the introduction of half price fares:

- New Zealanders with disabilities
- Under 30s
- 30-50 year olds
- The highest income households (\$100K pre-tax income per year and above)
- The lowest income households (\$30K pre-tax income per year or less)
- Asian communities
- Pacific peoples
- Māori communities

As a result, these groups were more likely to take advantage of half-price fares, add new journeys or switch from driving, walking and cycling.

Impact of urbanity

Generally, greater PT usage is common in demographic groups that tend to live in urban areas, where multiple public transport options may be available, including trains and ferries, or where bus networks at least serve more locations.

However, certain groups tend to have consistently higher reported PT usage even outside of major urban areas. These include:

- New Zealanders of Asian backgrounds in towns and rural areas
- Pacific peoples living in rural areas
- Higher income households (\$100K pre-tax income per year and above) in New Zealand towns.

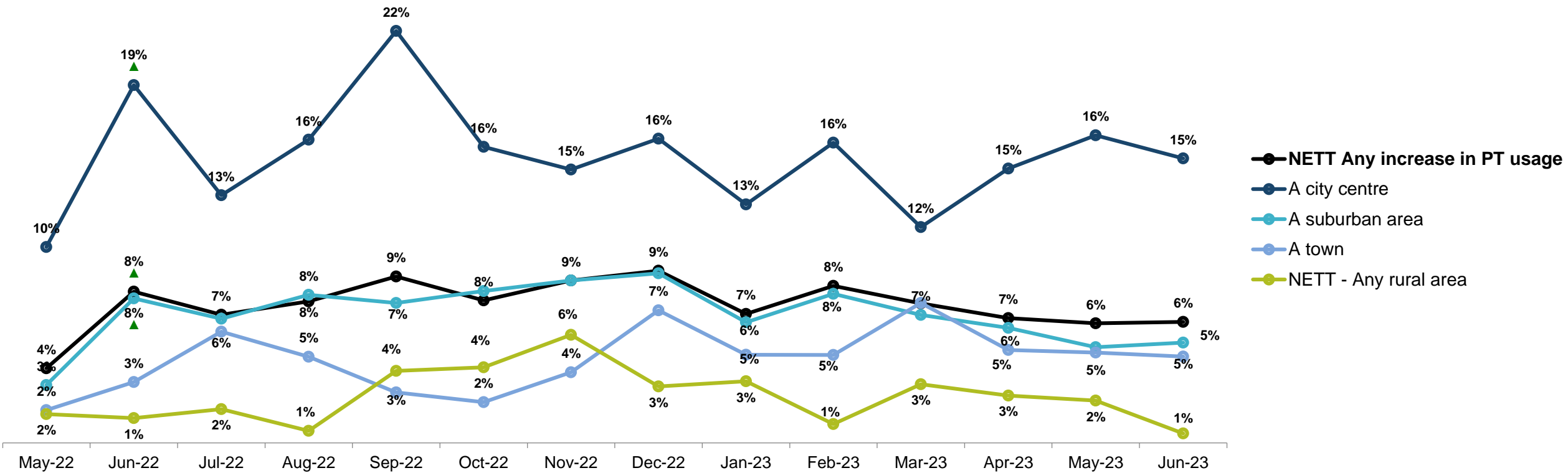
This meant that some groups were able to benefit from half price fares, even when living outside of city centres.

However, for other groups, like the lowest income households (\$30K pre-tax income per year or less), European and Māori people, mode switching and new journeys due to half price fares were less common in areas outside of CBDs.

Evidence covered in previous reports from [August 2022 and December 2022](#)

Where are journeys being added?

Whilst half-price fares have been in effect, consistently more new journeys have been added in city centres, with other parts of the country adding fewer journeys than the national average.



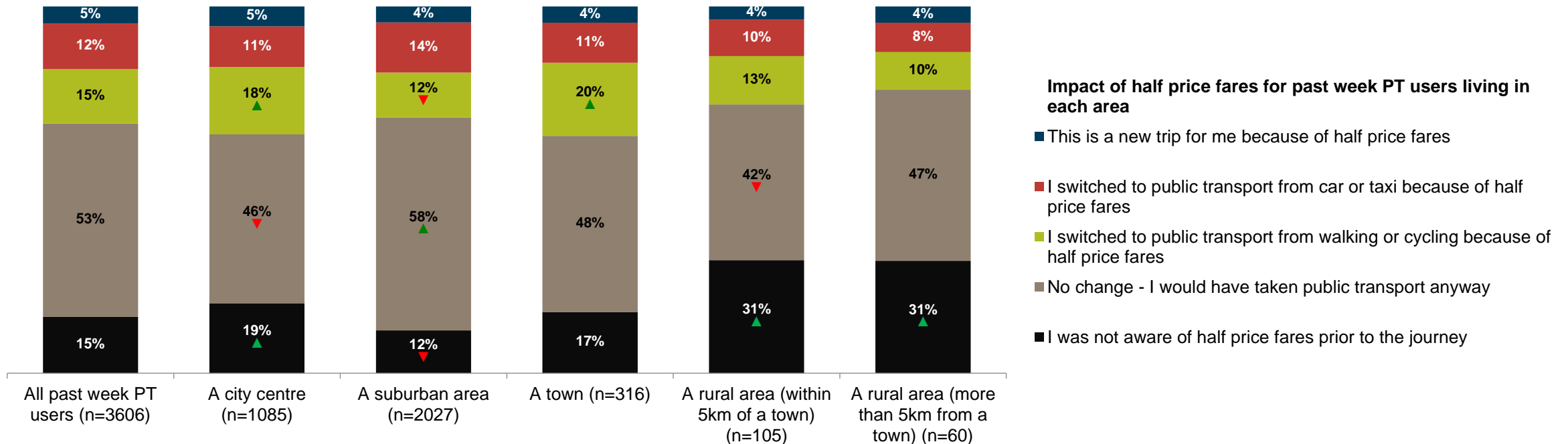
Q53d2 / Q53d3 On 1 April 2022 half-price public transport fares were introduced nationwide. Which statement best applies to your journey.../ You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)...

Base: All adults 15+ living in each area: city centres (n=between 152-363); suburban area (n=553-1,298); Towns (n=137-363); Rural areas (n=87-280)

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

Where are journeys being added?

A greater share of rural PT users were unaware of HPFs at the time of travel. In towns and cities, significantly more switching from active modes occurs. Those travelling from suburban areas have been a little more likely to switch from cars, but significantly more likely to travel regardless of HPFs.



Q53d2 / Q53d3 On 1 April 2022 half-price public transport fares were introduced nationwide. Which statement best applies to your journey.../ You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)...

Base: All travelling by public transport in past week, COVID-19 impact tracking May 2022, Journey Monitor survey May-22 – Jun-23

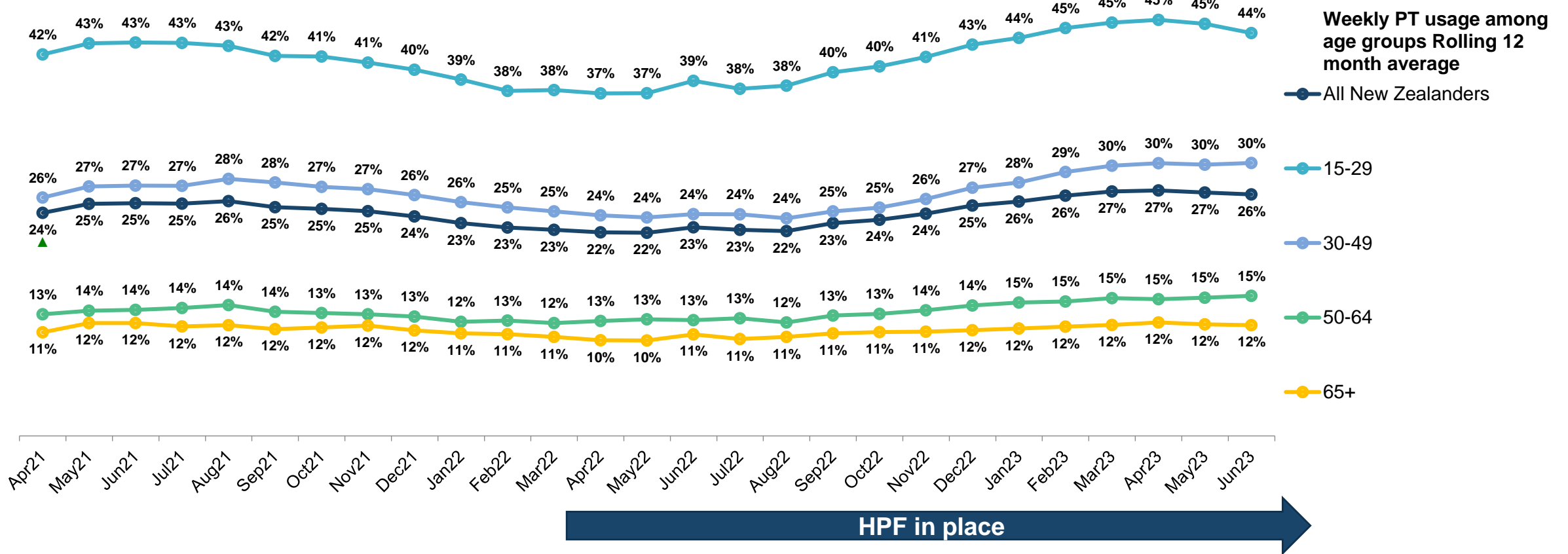
Impact of half price fares for past week PT users living in each area

- This is a new trip for me because of half price fares
- I switched to public transport from car or taxi because of half price fares
- I switched to public transport from walking or cycling because of half price fares
- No change - I would have taken public transport anyway
- I was not aware of half price fares prior to the journey

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

How has weekly PT usage varied across age groups?

Prior to half-price fares, reported weekly PT usage among under 30s was almost double that of all other age groups. Patronage climbed among under 50s from August 2022, but there has been little change among over 65s, though those with gold cards may not have experienced much difference in fares.

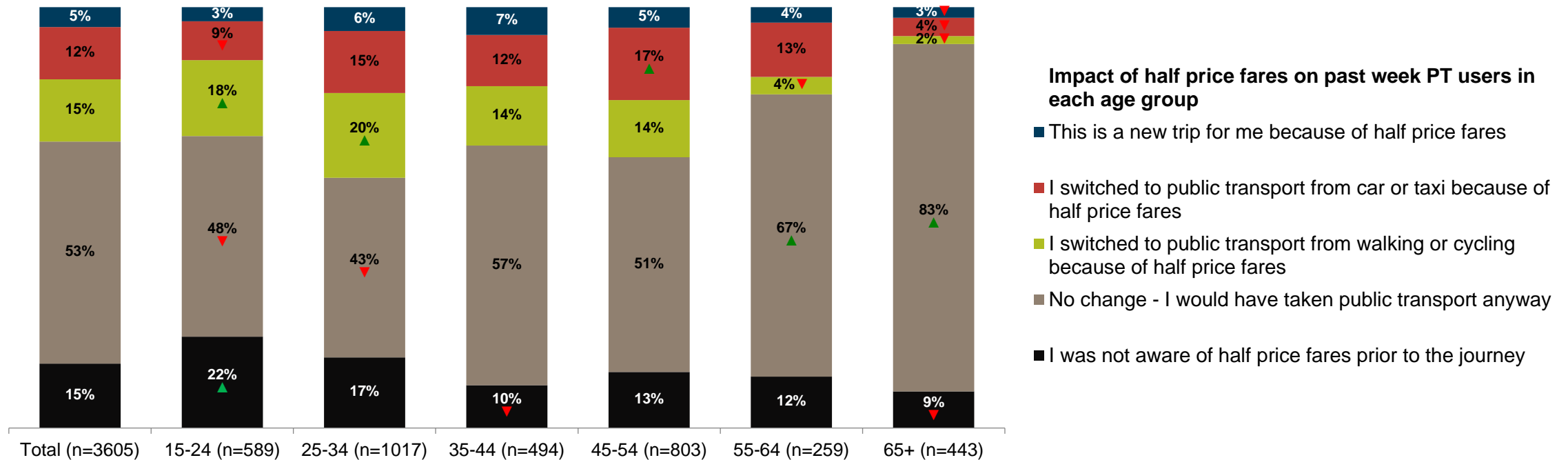


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for a PT mode
 Base: Journey Monitor data, 12 month rolling average

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

What types of people are adding journeys?

25-34 year old PT users have benefited the most from half-price fares, 1-in-5 switched from walking or cycling. PT users aged 45-54 have been most likely to switch from driving or taxis, with 1-in-6 doing so. Over 65s who travelled by public transport during this period have been largely unaffected by HPFs.



- Impact of half price fares on past week PT users in each age group**
- This is a new trip for me because of half price fares
 - I switched to public transport from car or taxi because of half price fares
 - I switched to public transport from walking or cycling because of half price fares
 - No change - I would have taken public transport anyway
 - I was not aware of half price fares prior to the journey

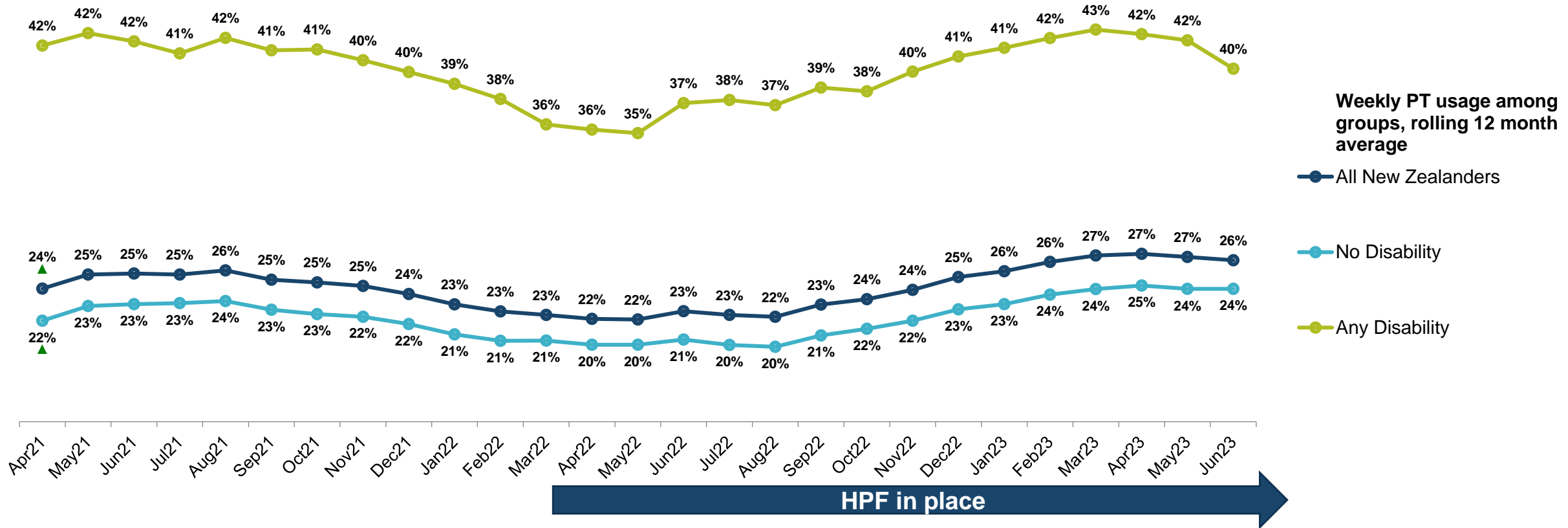
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Base: All travelling by public transport in past week, COVID-19 impact tracking May 2022, Journey Monitor survey May-22 –June-23

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

How has weekly PT usage varied for those with disabilities?

Reported PT usage for all groups have climbed steadily for half price fares, but the proportion of those with disabilities using PT increased by 8-points from May-22 to March-23, although this has declined in Q2.

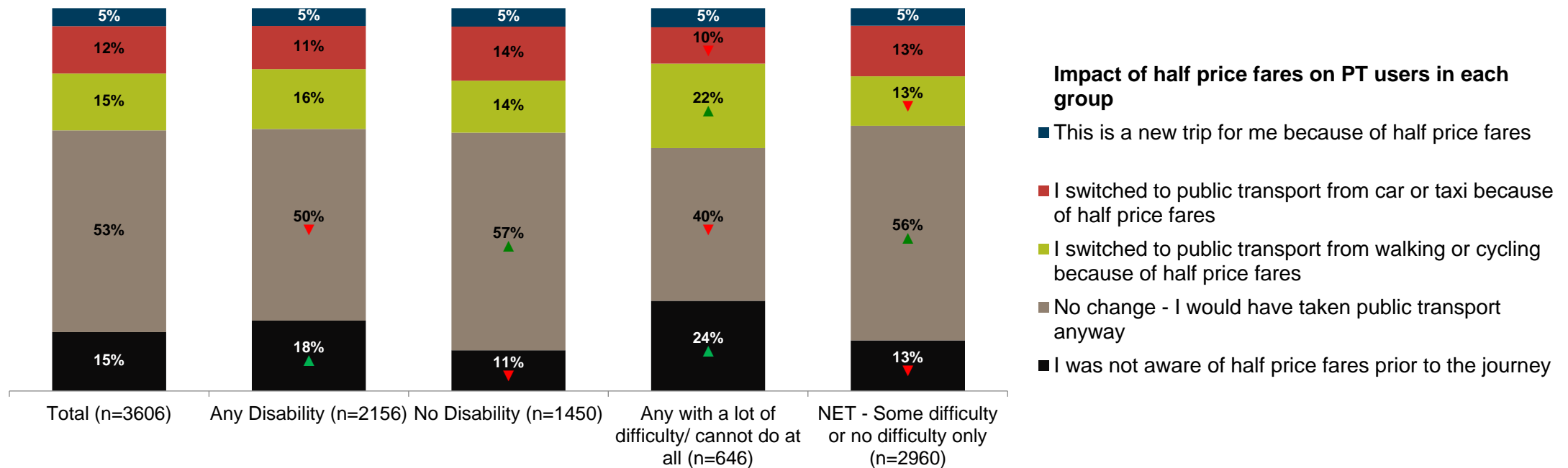


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for a PT mode
 Base: Journey Monitor data, 12 month rolling average

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

What types of people are adding journeys?

Those with disabilities, particularly more severe ones are significantly more likely to have travelled without knowledge of half-price fares. 1-in-5 of those with more significant disabilities switched from active mode travel, but were significantly less likely to switch from driving.



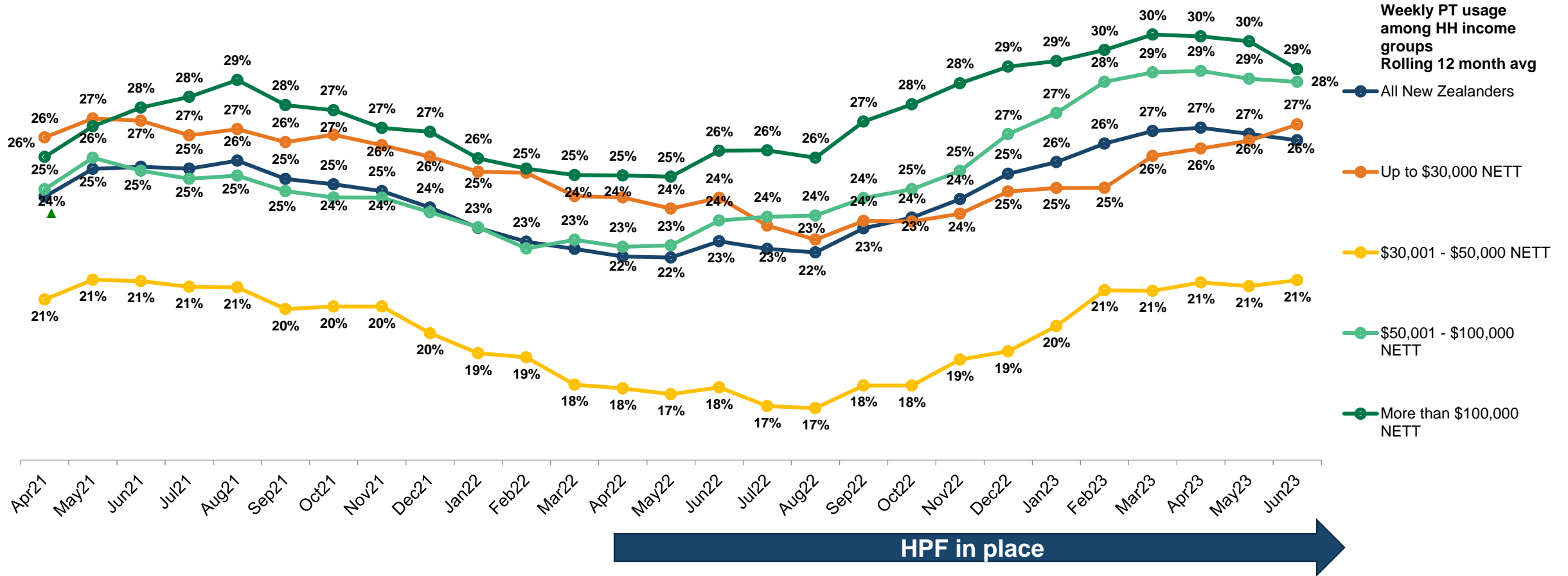
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Base: All travelling by public transport in past week, COVID-19 impact tracking May 2022, Journey Monitor survey May-22 – June-23

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

How has weekly PT usage varied across income groups?

Since August, weekly PT patronage has climbed steadily for all income groups, however, for much of the past 12 months patronage has been below average for the lowest income New Zealanders

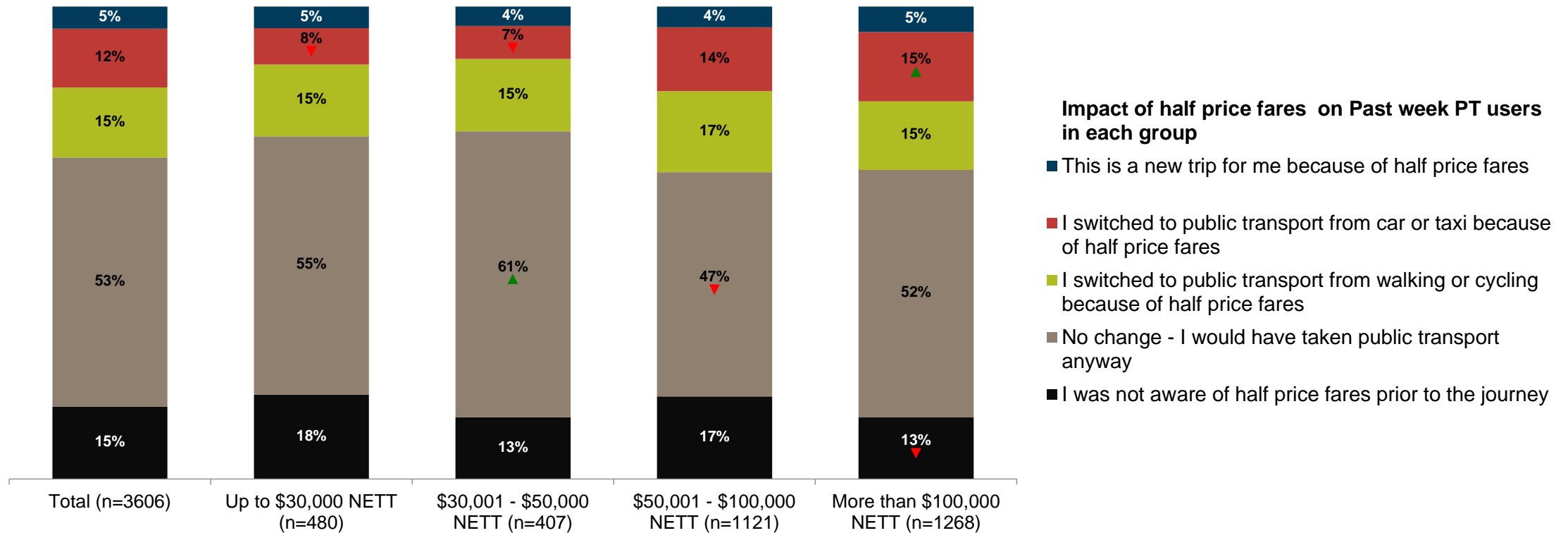


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for a PT mode
 Base: Journey Monitor data, 12 month rolling average

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

What types of people are adding journeys?

Higher income PT users are more likely to have added new journeys due to half price fares and significantly more likely to have switched from private vehicles, almost twice the proportion of lower income PT users.



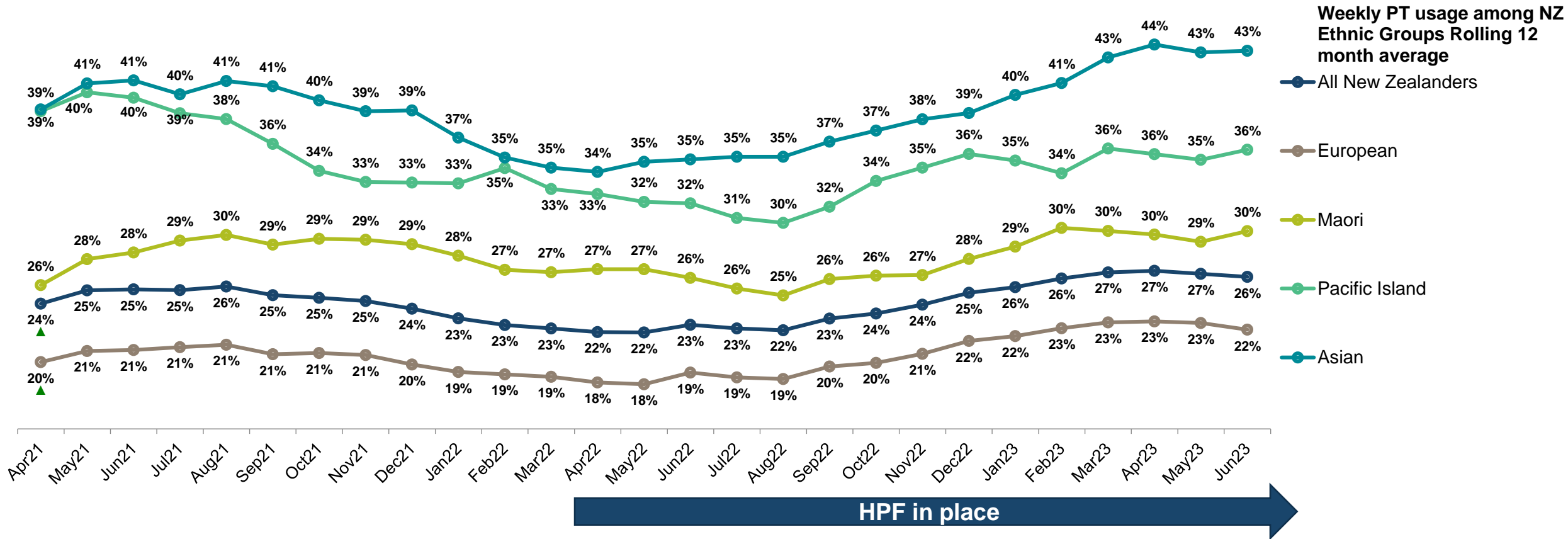
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Base: All travelling by public transport in past week, COVID-19 impact tracking May 2022, Journey Monitor survey May-22 – June-23

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

How does normal PT usage vary across ethnic groups?

Reported weekly patronage has also been climbing steadily for all ethnic groups, New Zealanders from Asian backgrounds continue to be the biggest PT users, with usage by European groups around half that level.

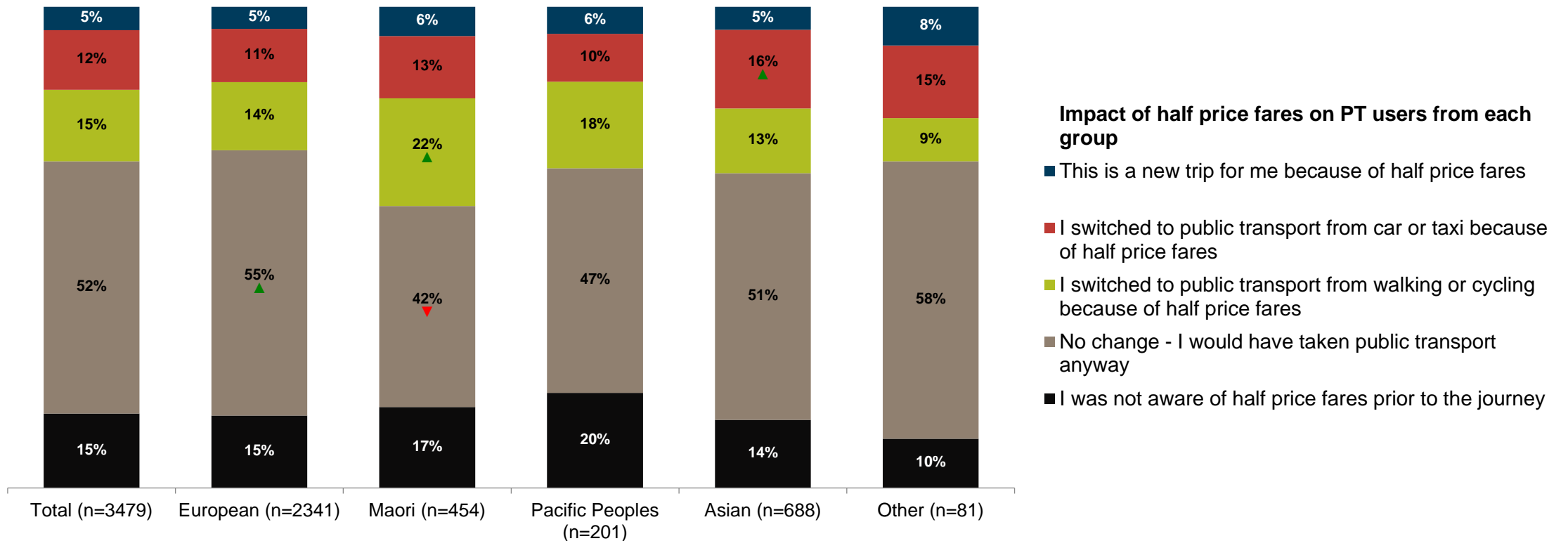


QAF1 - On how many days in the last week have you travelled each of these ways? % selecting 1-7 days for each more
 Base: Journey Monitor data, 12 month rolling average

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

What types of people are adding journeys?

Māori PT users are the most likely to have added journeys due to HPFs, with more than 2-in-5 doing so, the majority of this coming from switching from active modes. Asian New Zealanders are significantly more likely to have replaced car and taxi journeys with public transport.



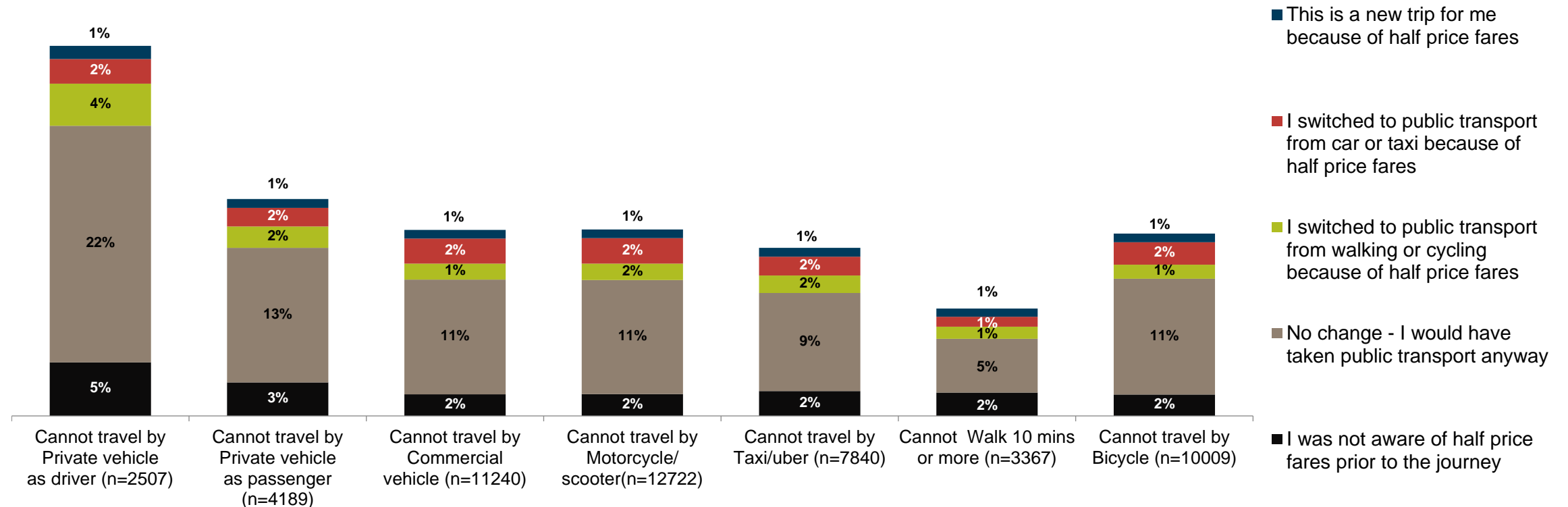
Q53d2 / Q53d3 On 1 April 2022 half-price public transport fares were introduced nationwide. Which statement best applies to your journey.../ You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)...

Base: All travelling by public transport in past week, COVID-19 impact tracking May 2022, Journey Monitor survey May-October 2022

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

Are HPFs helping those who can't travel in other ways?

Those unable to drive a private vehicle tend to use public transport more and 1-in-5 say they would have used PT regardless of HPF. HPFs have added journeys for those unable to use most modes at broadly the same rate.



Q53d2 / Q53d3 On 1 April 2022 half-price public transport fares were introduced nationwide. Which statement best applies to your journey.../ You mentioned that you travelled by bus, train, or ferry in the past week. Half-price fares were in place during this time. Which statement best applies to your journey(s)...

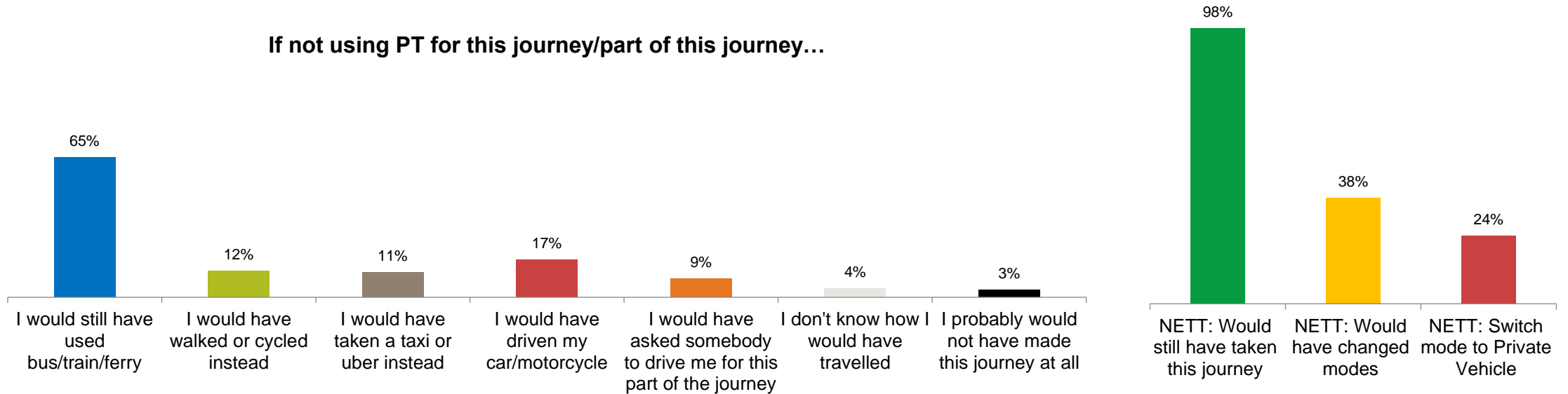
Base: All adults unable to use each mode, Journey Monitor survey May-22 – June-23

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

What journeys are HPFs replacing?

Almost all of those taking public transport in 2023 would have still travelled were HPFs not in effect, and two-thirds would still have used public transport. However, there are clear indications that private vehicle journeys were reduced by half-price fares, as almost a quarter would have driven or gotten someone else to drive them.

If not using PT for this journey/part of this journey...



Q54E7 If there were no half-price fares on public transport for this journey, how would you have travelled for this part of your journey? If you are not certain, please select the option that you would have been most likely to choose.

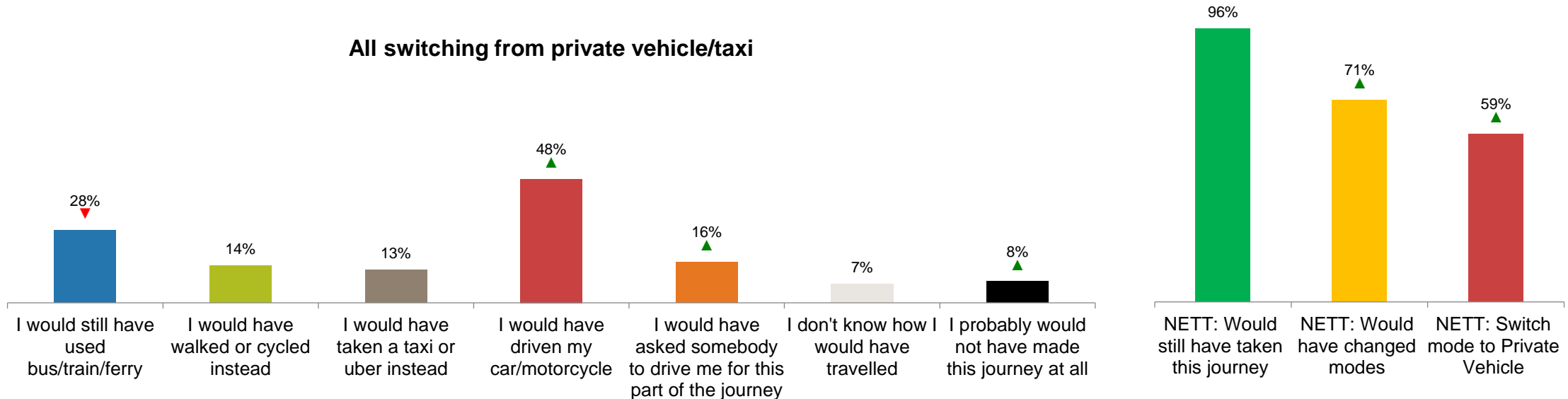
Base: All adults travelling on PT during past week, Journey Monitor survey January – June-23 (n=783)

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

What journeys are HPFs replacing?

Despite saying they switched from private vehicles, more than a quarter say they still would have chosen PT if HPFs weren't in place. Almost 3-in-5 would have used a car or motorcycle in some way but this group is significantly more likely to say the absence of HPFs would've meant they wouldn't have travelled.

All switching from private vehicle/taxi



Q54E7 If there were no half-price fares on public transport for this journey, how would you have travelled for this part of your journey? If you are not certain, please select the option that you would have been most likely to choose.

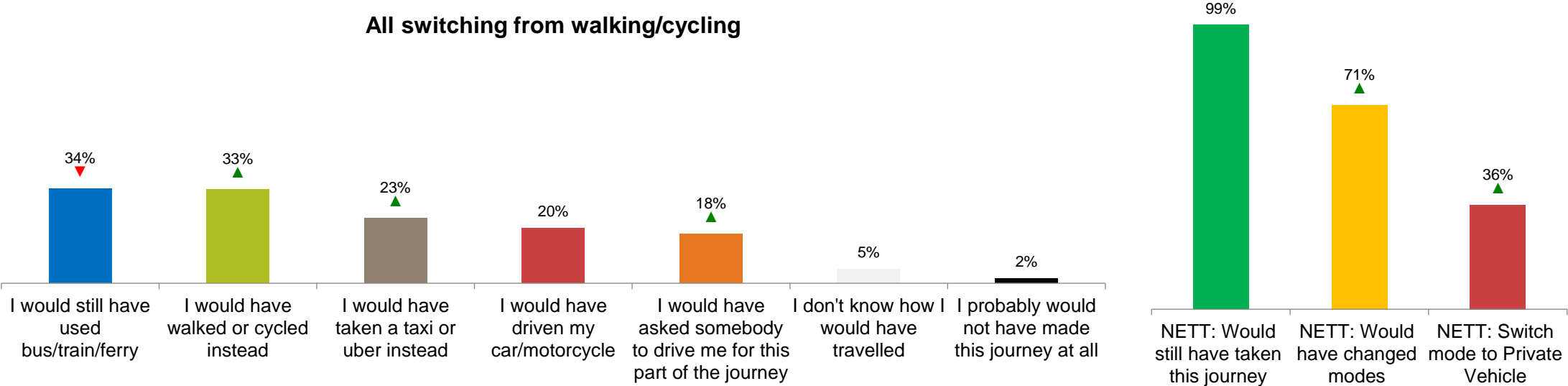
Base: All adults switching to PT from car or taxi because of half-price fares, Journey Monitor survey January – March-23 (n=112)

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

What journeys are HPFs replacing?

More than a third of those who switched from active modes say they would still have used PT without HPFs and even more would have switched to private vehicles. This may reflect regular active mode journeys which are trickier in certain conditions and which half-price fares enabled to continue without a switch to cars. Not all walking and cycling journeys are fixed to active modes and with 2023 weather conditions HPFs may have prevented these from contributing to vehicle traffic.

All switching from walking/cycling



Q54E7 If there were no half-price fares on public transport for this journey, how would you have travelled for this part of your journey? If you are not certain, please select the option that you would have been most likely to choose.
 Base: All adults switching to PT from walking or cycling because of half-price fares, Journey Monitor survey January – March-23 (n=108)

▲ Indicates proportion is higher than total sample to a statistically significant extent
 ▼ Indicates proportion is lower than total sample to a statistically significant extent

Section summary

Who is impacted?

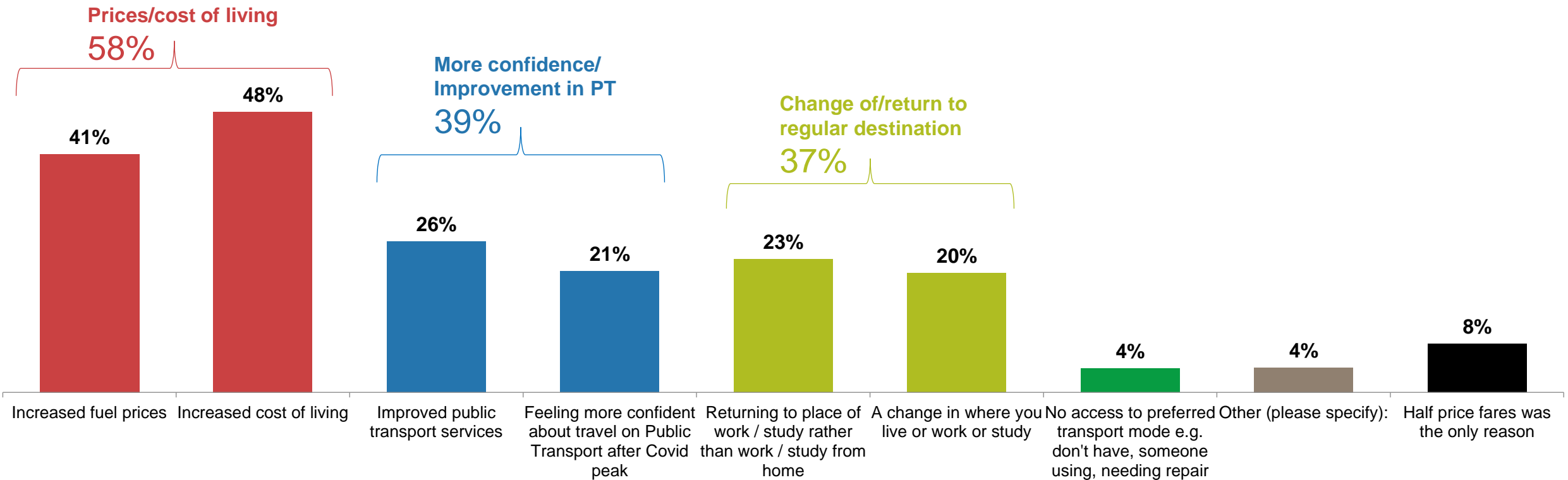
- Half-price fares enabled journeys continue to be most common in previously high-PT usage groups, including younger New Zealanders, New Zealanders with disabilities and Asian and Pacific Peoples.
- However, reported weekly patronage for almost all groups has steadily increased since July 2022:
 - All age groups under 50 have seen an increase of 6-points or more in this time, with over 65s usage up 1-point.
 - By June 2023, reported weekly PT usage by the lowest income households was up 4-points and had matched the national average.
 - More than 2-in-5 New Zealanders with disabilities have been weekly PT users in 2023.
- PT users with more significant disabilities, Māori PT users and PT users under 35 have been significantly more likely to replace *active mode* journeys with PT due to half price fares. PT users in NZ cities and towns were also significantly more likely to replace journeys that they would otherwise have walked or cycled.
 - About a third of those switching from active modes in 2023 say that they would actually have chosen a private vehicle for the journey they replaced were HPFs not in place.
 - Only a third would still have walked or cycled. It is important to note that some journeys that are usually walked or cycled may experience mode switching under certain conditions and given NZ weather in 2023, HPFs might have made public transport a viable alternative instead of a car.
- Private vehicle and taxi journeys have been significantly more likely to be replaced by PT by those aged 45-64, Asian travellers and those from the highest income households.
 - Almost 1-in-10 of those switching from cars and taxis say they wouldn't have travelled at all. Previous analysis has shown cost of living concerns to be higher in this group, with cost of daily travel a big concern. HPFs may have helped some to continue travelling on journeys that would otherwise have been too costly by car or taxi.

What role has price, cost of living and perceived affordability played?

Stated value and impact of affordability and value, journey experience ratings

What factors influenced half-price journeys?

Prices and cost of living have consistently been a motivating factor in taking advantage of half-price fares

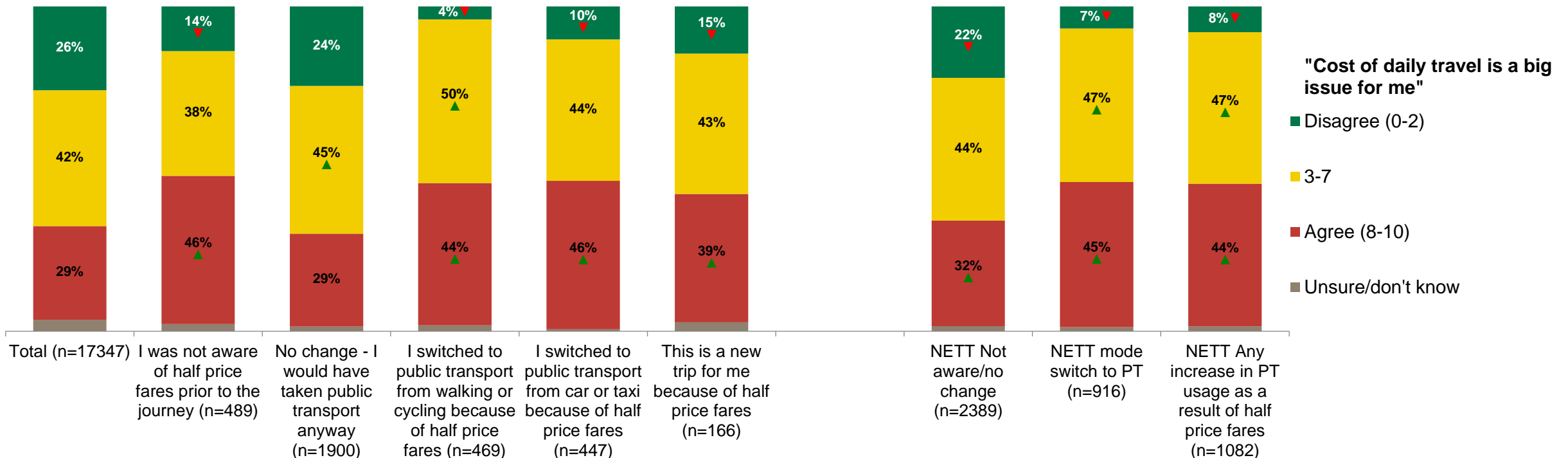


Q54E4 Did anything else impact on your decision to take half-price bus, train or ferry journey?

Base: All using public transport as main mode in most recent journey having switched from active modes or private vehicles or as an entirely new journey, Journey monitor Apr-22 to Mar-23 (n=409)

Did HPF reduce travel cost concerns?

Those switching to PT due to half-price fares are much more likely to agree that travel costs are a big issue for them. Accessing PT via HPFs can help reduce these stresses.

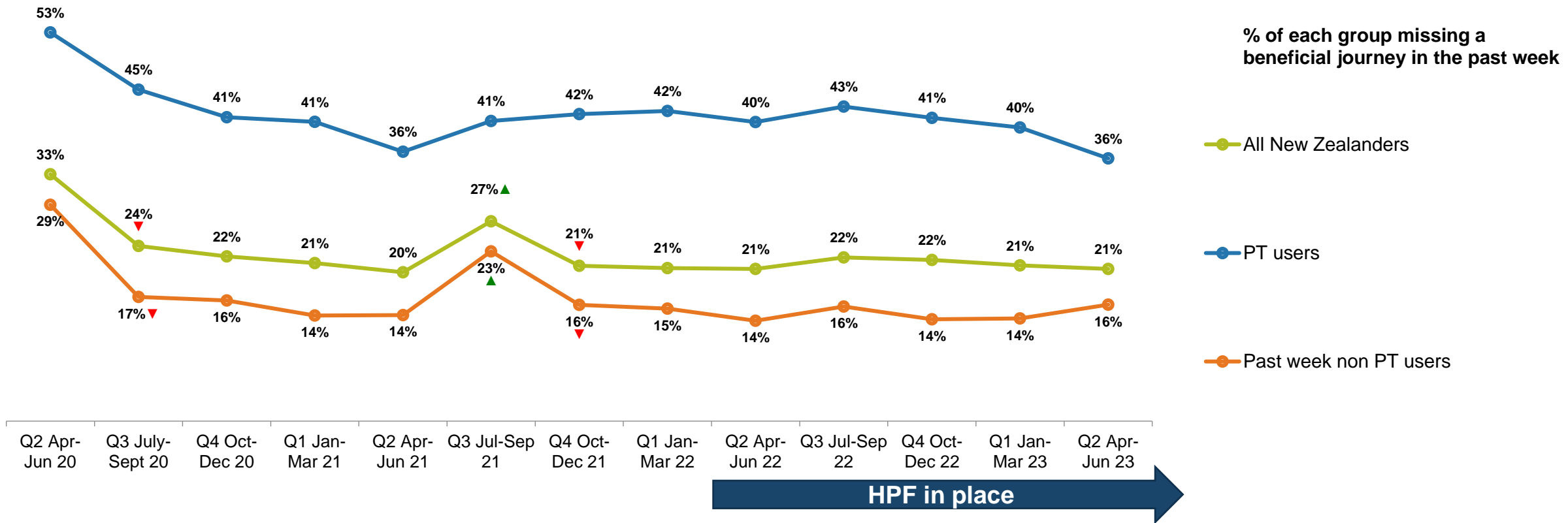


QAF3 How much do you agree or disagree with the following statements?
 Base: All adults in New Zealand 15+ - Customer Journey Monitor Apr-22 to Jun-23

▲ Indicates proportion is higher than total sample to a statistically significant extent
 ▼ Indicates proportion is lower than total sample to a statistically significant extent

Did HPF reduce journeys missed overall?

PT users have consistently been more likely to miss beneficial journeys since April 2020 and initial COVID restrictions. However, this has been declining since winter of 2022.



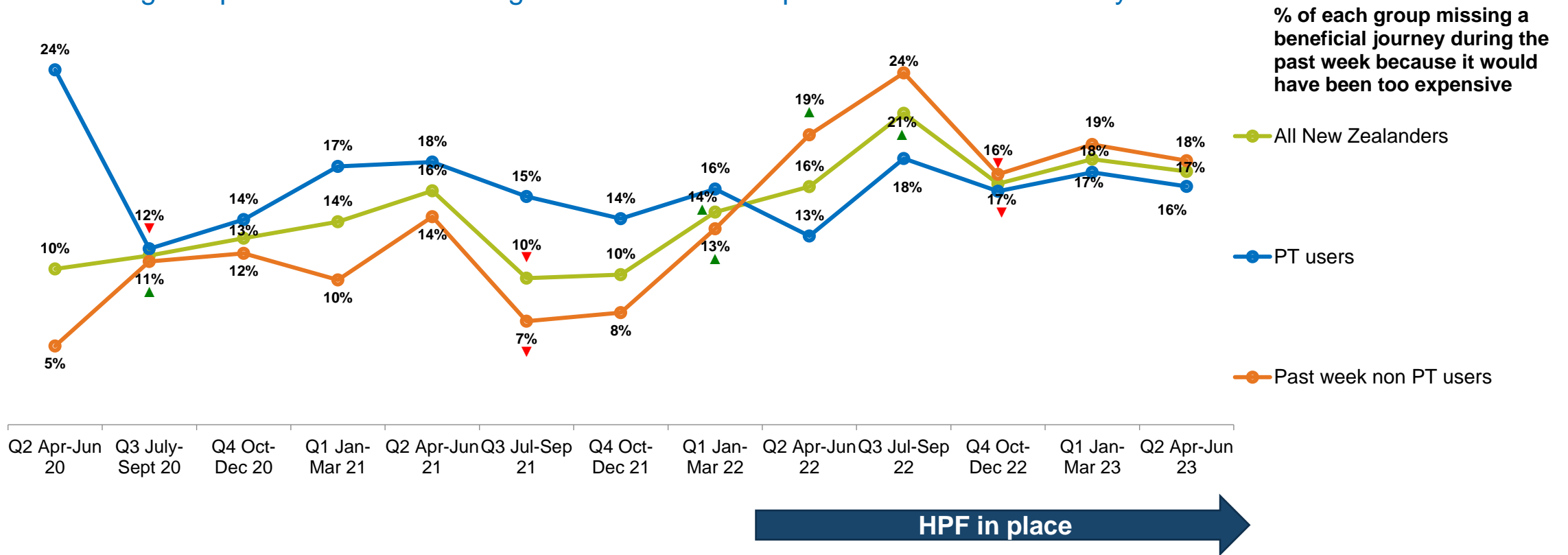
Q11 Were there any journeys within the last week which would have been beneficial to undertake, but you couldn't?

Base: Journey Monitor, past week public transport users (n=546-895 per time period), non public transport users (n=1,963-3,231 per time period)

▲ Indicates a statistically significant increase from preceding time period
▼ Indicates a statistically significant decrease from preceding time period

Did HPF reduce journeys missed due to cost?

Prior to HPFs, PT users tended to miss more journeys due to cost. However, in Q2 of 2022 onwards, this became significantly more common among non-PT users. Whilst the share of PT users missing journeys has not declined significantly compared to the start of 2022, HPFs may have helped insulate some of these New Zealanders from increasing fuel prices and cost of living issues that have impacted travel more broadly.

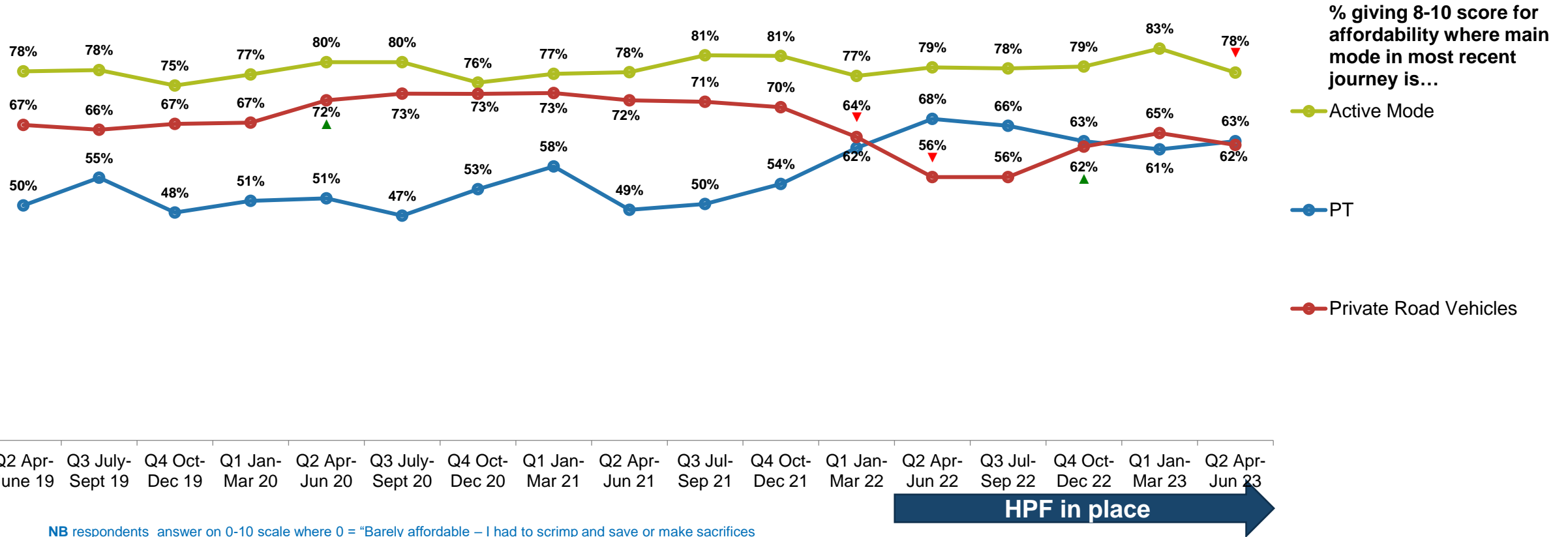


Q11 Were there any journeys within the last week which would have been beneficial to undertake, but you couldn't?
 Base: Journey Monitor, past week public transport users (n=546-895 per time period), non public transport users (n=1,963-3,231 per time period)

▲ Indicates a statistically significant increase from preceding time period
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Did HPF increase perceptions of affordability?

The perception that PT is affordable was already increasing prior to the introduction of HPFs, but was better for PT than private vehicles for the first three quarters HPFs were in effect. There has been a gradual decline in perceived affordability since then, but it remains better than in all previous years.



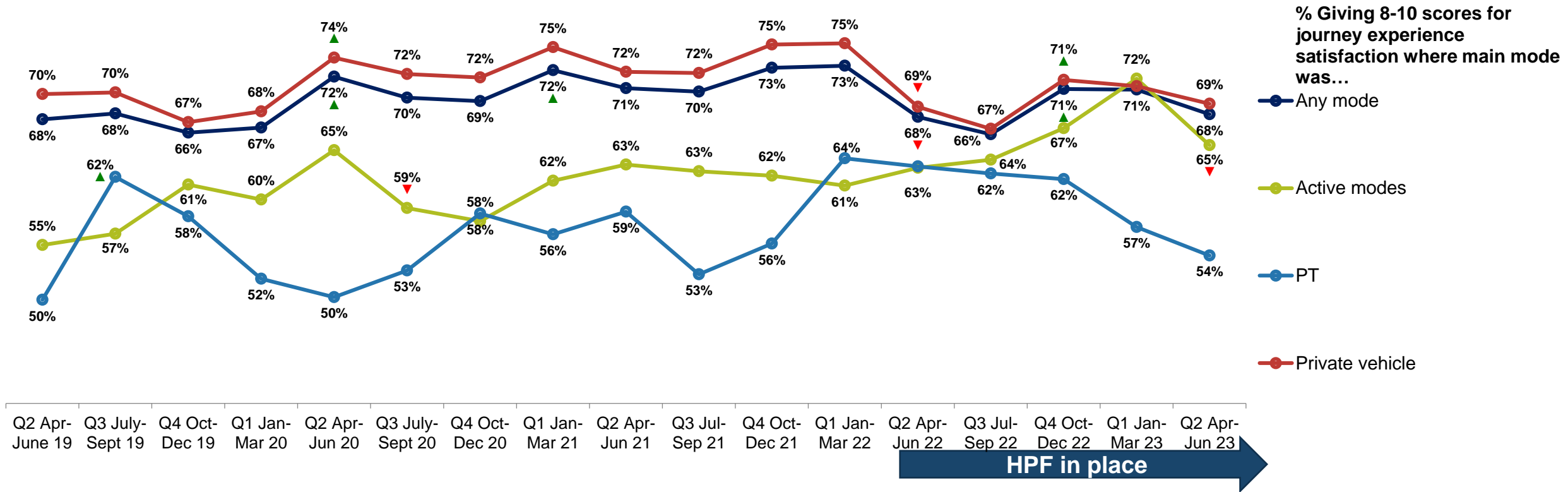
NB respondents answer on 0-10 scale where 0 = "Barely affordable – I had to scrimp and save or make sacrifices to pay for it" and "10 =Totally affordable – It had no noticeable impact on my available funds"

Q30b. How affordable would you say this [IF MORE THAN ONE TRANSPORT USED AT Q24 ADD "part of your"] journey was for you...?
 Base: All using public transport as main mode in most recent journey, Journey monitor

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

Have PT journey experiences been positive?

Overall journey experience scores have been gradually declining whilst half-price fares have been in place, down 10-points since Q1 of 2022.



Overall Journey Experience [IF MORE THAN ONE TRANSPORT USED AT Q24 ADD "part of your"] journey was for you...?
 Base: All using public transport as main mode in most recent journey, Journey monitor

▲ Indicates a statistically significant increase from preceding time period
 ▼ Indicates a statistically significant decrease from preceding time period

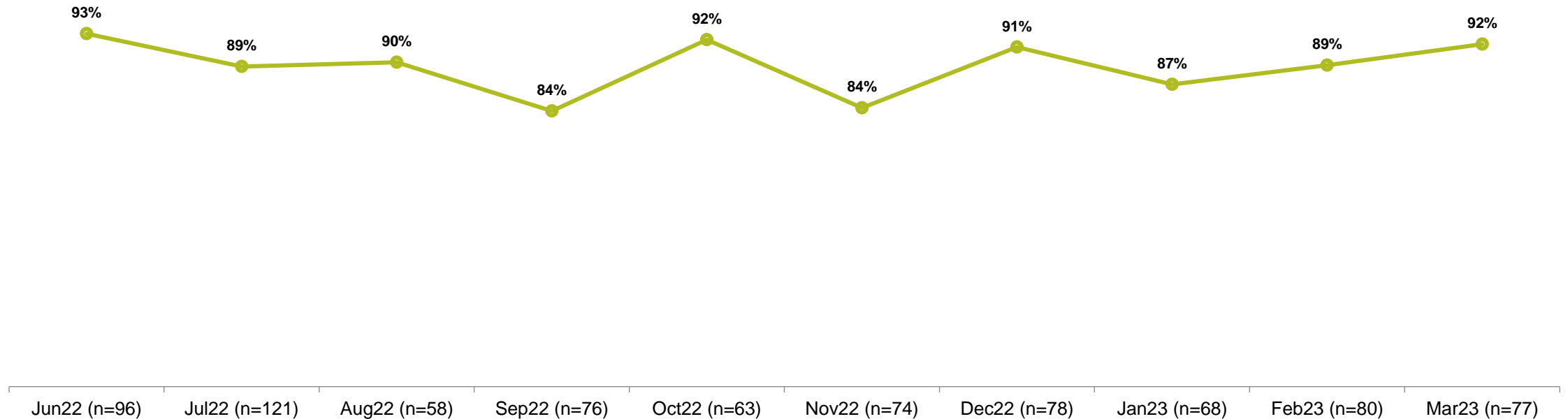
Will additional public transport patronage be sustained?

Perceptions of value, affordability and journey ratings

Do new PT users intend to keep using?

Those making new PT journeys have consistently stated a high intent to continue, and this has never been below 4-in-5 users.

Proportion of adults making new PT journeys who would travel by PT again in the next month

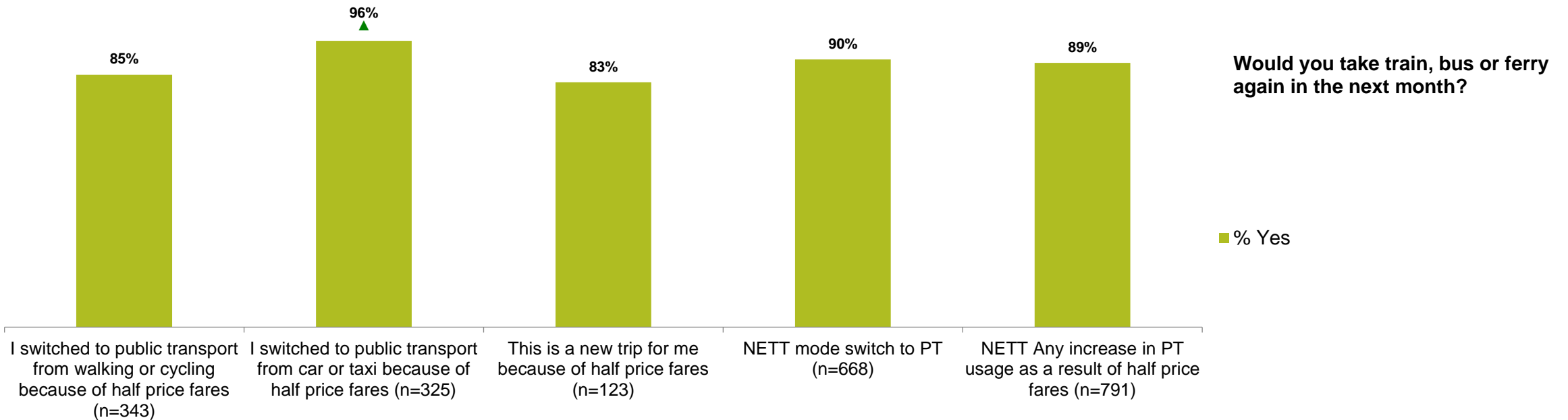


Q54E5 Would you take train, bus or ferry again in the next month?
Base: All taking new trips on PT during the past week, Journey Monitor, Jun-22 to March-23

▲ Indicates proportion is higher than total sample to a statistically significant extent
▼ Indicates proportion is lower than total sample to a statistically significant extent

Do new PT users intend to keep using?

Those switching from private vehicles and taxis have been significantly more likely to signal intent to continue using PT.



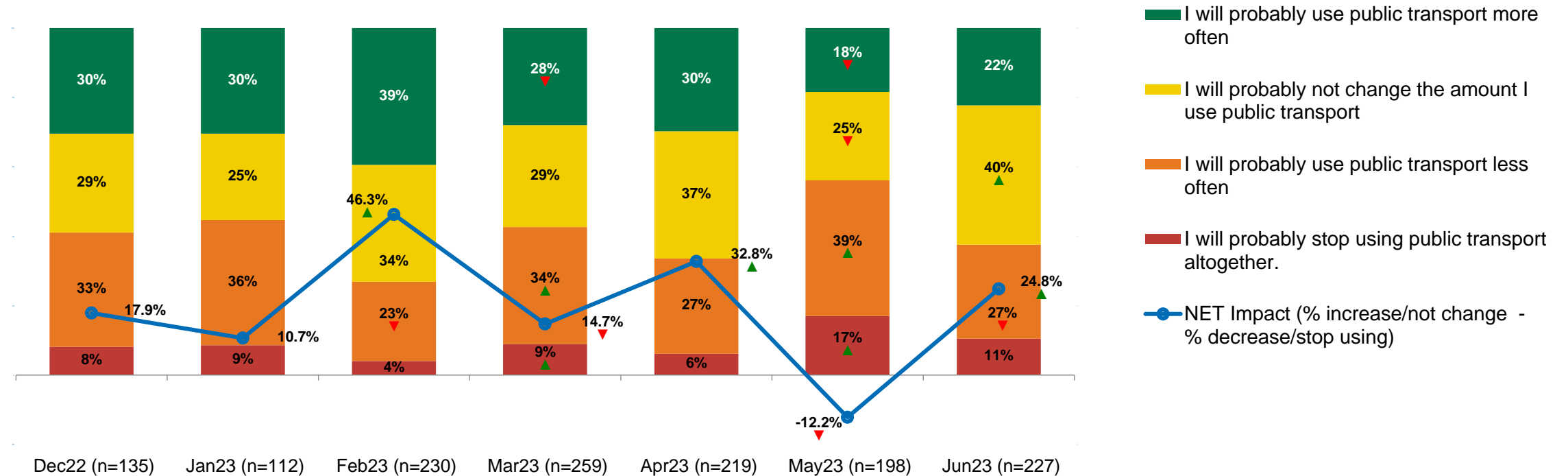
Q54E5 Would you take train, bus or ferry again in the next month?

Base: All taking new trips on PT during the past week, Journey Monitor, May-22 to Oct-22

▲ Indicates proportion is higher than total sample to a statistically significant extent
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Will journeys continue after HPFs?

When presented with the end of half-price fares, most PT users making new journeys indicate they will continue to use buses, trains and ferries. Intention to use more may be based on speculation, for example around other users giving up services and may not be as reliable an indicator of future behaviour.

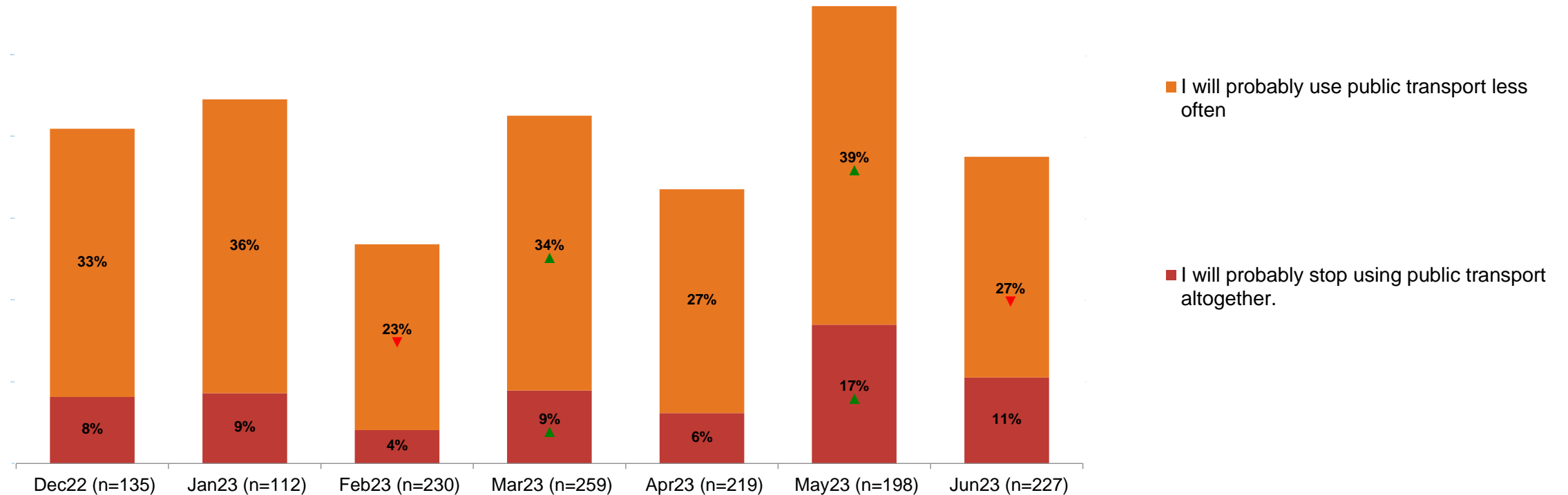


Q54d6a You indicated that you have used public transport in the last 7 days. Half-price fares for public transport are due to end on [31 March/30 June) 2023, to what extent, if at all, will this change how often you use public transport?
 Base: All adults travelling on PT because of half-price fares, Journey Monitor survey Dec-22 – June-23

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Will journeys continue after HPFs?

When presented with the end of half-price fares, most PT users making new journeys indicate they will continue to use buses, trains and ferries.

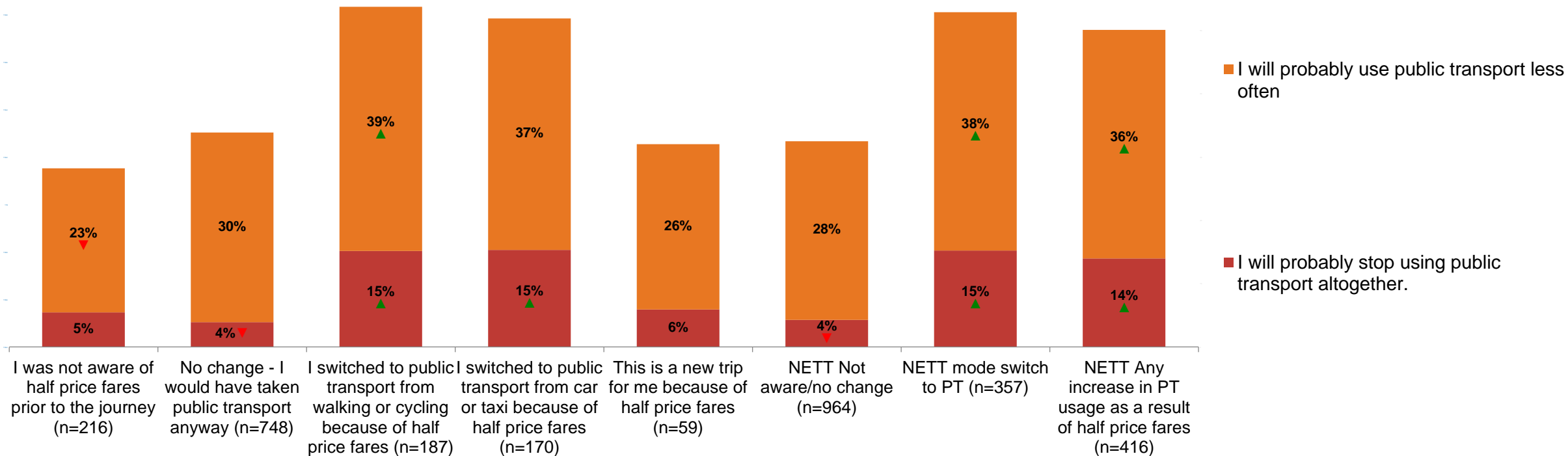


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Will journeys continue after HPFs?

Those switching modes are the most likely to leave PT services at the end of half-price fares. Those making entirely new journeys may have made more one-off trips as an exception to their normal travel behaviour and if they do not do so again, this would not represent a significant change to their regular behaviour.

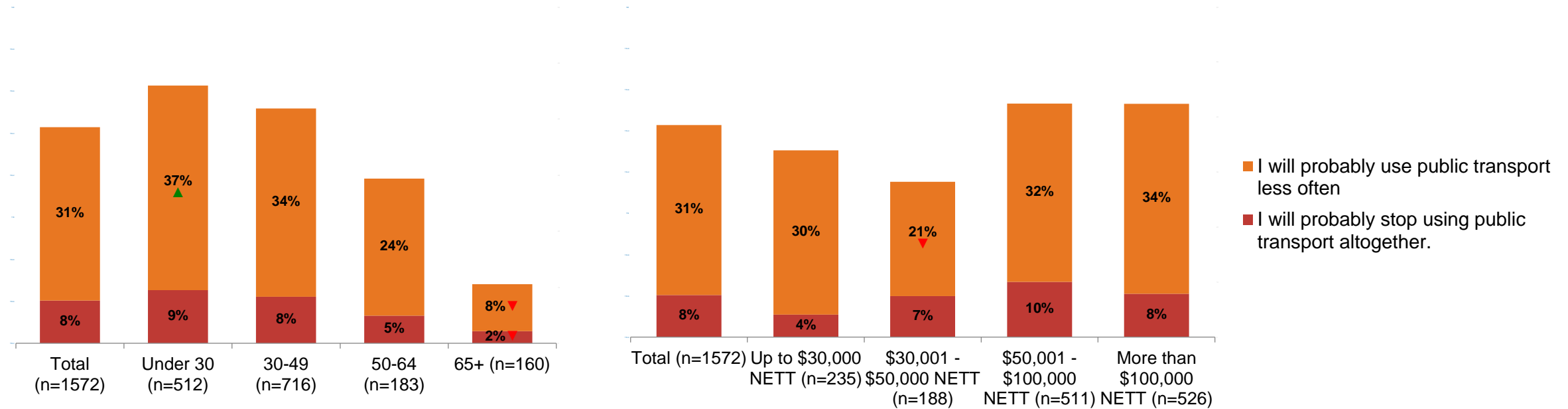


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 Base: All adults travelling on PT because of half-price fares, Journey Monitor survey Dec-22 – June-23

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Who will continue PT journeys after HPFs?

Over 65s, who have been least impacted by half-price fares are least likely to indicate a behaviour change when HPFs end, but younger PT users indicate they are more likely to reduce their patronage. There is less variation in intention to change according to income, with lower and higher income groups equally likely to reduce their patronage when HPFs end.



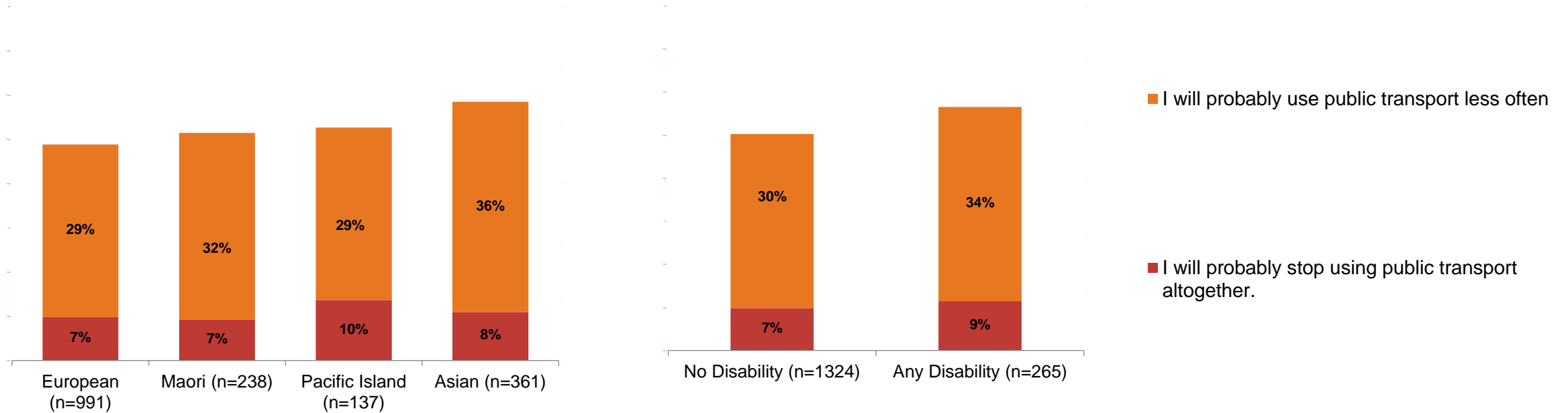
Q54d6a You indicated that you have used public transport in the last 7 days. Half-price fares for public transport are due to end on [31 March/30 June) 2023, to what extent, if at all, will this change how you use public transport?

Base: All adults travelling on PT because of half-price fares, Journey Monitor survey Dec-22 – June-23

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Who will continue PT journeys after HPFs?

As with income, there is only a little variation in intention to change after HPF ends, according to ethnicity and disability status. PT usage is somewhat more likely to decrease for groups who have increased their PT usage and added more journeys as a result of HPFs. Those who have added fewer journeys or already use PT less are more likely to say that their patronage will be unchanged.



Q54d6a You indicated that you have used public transport in the last 7 days. Half-price fares for public transport are due to end on [31 March/30 June] 2023, to what extent, if at all, will this change how often you use public transport?
 Base: All adults travelling on PT because of half-price fares, Journey Monitor survey Dec-22 – June-23

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Section summary

Could additional PT travel be sustained?

- Stated intent to continue using public transport among those making new trips has always been high and, while measured, was highest among those switching from private vehicles.
- With half-price fares initially scheduled to conclude at the end of March and then June 2023, some new users indicated that they would decrease their PT usage, or stop using it altogether.
 - However, at points the proportion indicating their patronage would increase was equal or greater than this group intending to reduce their patronage.
 - This intention to increase patronage may come from trialists under HPFs who have found PT solutions that work for them. It may also include people who expect patronage from others to decrease, making services less crowded or easy to use.
 - Travellers have not given a reason for intending to increase, but it is important to note that if their intention comes from expectations of the service post-HPF, this intended increase may be more limited.
 - Ultimately, stated intent to continue, increase or reduce patronage has limitations because PT user expectations of post HPF costs, service delivery and other factors which inform their stated intent.
- Where there is stated intent to change, this often correlates with higher existing patronage or greater impact from HPFs during the past 12 months. Younger PT users are more likely to indicate decrease or stoppage, whereas over 65s who have not changed their patronage a great deal say they are unlikely to change their travel patterns after July.

For further information

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<https://www.nzta.govt.nz/planning-and-investment/learning-and-resources/research-programme/>

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