NZ TRANSPORT AGENCY WAKA KOTAHI

Public transport

Subject	**Annual reporting requirements for public transport authorities**
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Purpose

This document sets out the annual reporting requirements for Public Transport Authorities (PTAs) to the NZ Transport Agency Waka Kotahi (NZTA). This annual reporting requirement is in addition to monthly reporting requirement.

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).

Requirements

PTAs **must** provide annual reporting to NZTA by the third Monday of July each year (e.g. 21 July 2025), 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** submit the Excel template in the required format either by email to pt.reporting@nzta.govt.nz, or to a secure folder as arranged with NZTA, by the date specified above. The required reporting template can be downloaded from the monitoring and review webpage and includes the following worksheets:

- [Performance] – information on the performance of public transport services
- [Satisfaction Area 1,2,3] – customer satisfaction survey results for the specified area

The Excel template requires information for the most recently completed financial year and in some cases the previous financial year. The template is locked by default and should not be changed other than the input data required.

Definitions

Public transport service performance

The [Performance] worksheet provides for all end-of-year reporting with the exception of customer satisfaction surveys. The previous financial year results are pre-populated in the template. The template includes the following metrics.

Public Transport Authority

- Public Transport Authority – Select from the pre-populated dropdown list.

Network and demographics

- Total population of serviced community – number of people living within the region – total for region and separately by serviced community (where applicable).
- Total population within 500m of a public transport stop – number of people living with 500m walking distance of a public transport stop – total for region and separately by serviced community (where applicable).

Crown fare substitutes

SuperGold

- Number of SuperGold (SGC) off-peak boardings – number of passenger boardings, including transfer boardings, by SuperGold card holders during off-peak periods (as part of the Crown concession scheme). Must include any qualifying exempt services and must align with monthly reporting of SGC concession boardings for off-peak periods.

Community Connect

- Number of Community Services Card (CSC) boardings – number of passenger boardings, including transfer boardings, by Community Services card holders (as part of the Crown concession scheme). Must include any qualifying exempt services and must align with monthly reporting of CSC concession boardings.

Public transport services

The following sections are presented by public transport mode – bus, train and ferry. On-demand must be included as part of the bus mode. The following definitions are the same as for monthly reporting and annual totals provided must align with monthly reporting totals.

Patronage and fares

- Passenger boardings – number of passenger boardings including transfer boardings, and including exempt services where applicable.
- Fare revenue – fares paid by passengers (excl. GST), including exempt services where applicable.
- Passenger kilometres – number of kilometres travelled by passengers, including exempt services where applicable.

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.
- 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 and arrived no later than 4 minutes and 59 seconds after the scheduled arrival time at the destination.

The following metrics are automatically calculated from entered data and are provided for comparison purposes. Please provide comments on any major variances.

- Reliability – percentage of scheduled trips that depart on time.
- Punctuality – percentage of operated trips that arrive on time.
- Cancellations – percentage difference between scheduled trips and operated trips.

Service delivery

- Service-kms scheduled – total service-kms from scheduled service trips.
- Service-kms operated – total service kms operated by vehicles.

Fleet and stations

- Total fleet size – number of vehicles / consists / carriages / vessels used to operate public transport services in contracted units within the region, including small passenger service vehicles used for on demand public transport. Further definition is provided in the monthly reporting document.

- Number of vehicles that are wheelchair accessible – number of vehicles / consists / carriages / vessels in the fleet that can carry one of more wheelchairs.
- Number of vehicles that can carry one or more bikes – number of vehicles / consists / carriages / vessels in the fleet that can carry one or more bikes.
- Number of vehicles older than 10-years (bus only) – number of vehicles older than 10-years of age.
- Number of vehicles that are super-low floor (bus only) – number of vehicles that have no steps between the ground and the floor of the bus at one or more entrances, and a low floor for part or all of the passenger cabin.
- Total number of stations (train only) – number of railway stations.
- Number of stations with wheelchair access (train only) – number of stations with platforms that are raised for wheelchair accessibility.

Exempt services – applicable to Wellington (cable car) and Auckland (ferry) only

- Passenger boardings – number of passenger boardings including transfer boardings on exempt services.
- Fare revenue – fares paid by passengers (excl. GST) on exempt services.
- Passenger kilometres – number of kilometres travelled by passengers on exempt services.

Total Mobility services

- Number of persons registered – number of persons in the region currently registered for the Total Mobility scheme.
- Maximum fare subsidy – maximum fare subsidy cap. Where different maximum fare caps exist please name the relevant service areas and applicable maximum fare for those areas in the comments box.

Wheelchair hoists

- Number of wheelchair hoists in operation – number of hoists operating in Total Mobility vehicles in the region
- Number of new wheelchair hoists installed this year – number of new hoists installed in Total Mobility vehicles in the reported financial year.
- Average age of hoists – The average age of hoists operating in Total Mobility vehicles in the region

Passenger trips

- Number of client trips - number of passenger trips undertaken using Total Mobility
- Number of hoist trips – number of hoist trips undertaken using Total Mobility

Fares and subsidies

- Fare paid – total fares paid by Total Mobility passengers (excl. GST)
- Fare subsidy – total fare subsidies claimed (excl. GST)
- Fare total – total fare charged by transport operators, including both fares paid and fare subsidies (excl. GST)
- Hoist fee (excl. GST) - total subsidies claimed for hoist usage (excl. GST)

Financial information

The following information is required to meet the quarter 4 ministerial reporting requirements for public transport private share and should be used in place of the template provided on the specific requirements and reporting template webpage. A separate quarterly return for private share is not required. All financial information must exclude GST.

Private revenue

- Passenger fares – passenger fare revenue, including fare revenue from net and exempt services receiving financial assistance. Automatically calculated from fare revenue entered above.
- Private fare substitutes – third-party revenue from private fare substitutes such as corporate, tertiary and Health NZ (previously DHB) fare schemes.
- Commercial revenue – third-party revenue from commercial sources including advertising, sponsorship, rental or investment income generated from the delivery of the public transport system.
- Other private revenue – any other private revenue.
- Total private revenue – sum of passenger fares, private fare substitutes, commercial revenue, and other private revenue. Automatically calculated from fields entered above.
- Name of third parties providing revenue – provide the names of third parties providing private fare substitutes, commercial revenue and other private revenue.

Operating expenditure

- Passenger services – total gross expenditure on public transport services, prior to applying any subsidies. Operating expenditure needs to include recognition of any revenue that is retained by transport operators or other contracted parties, such as for net contracts or exempt services that receive financial assistance. Include activities funded under work categories 511, 512, 515.
- Operations and maintenance – total gross expenditure on the maintenance, operations and management of public transport services and infrastructure, prior to applying any subsidies. Include activities funded under work categories 514, 524, 525 (excluding any technology renewals under work category 525).
- Total operating expenditure – sum of passenger services and operations and maintenance expenditure. Automatically calculated from fields entered above.
- Private revenue ratio – total private revenue divided by total operating expenditure. Automatically calculated from fields entered above.

Customer satisfaction surveys

The [Satisfaction Area X] worksheets provide for reporting of customer satisfaction survey results. Please create a separate worksheet for each service area surveyed (three worksheets are provided by default). Further details are provided in appendix K of the NZTA procurement manual.

General

- Service area – select from the pre-populated dropdown list.
- Mode – select from the pre-populated dropdown list.
- Survey date – enter date of survey (e.g. Mar-2025).
- Total number of people surveyed – enter total number of people surveyed.

Satisfaction ratings

For each of the following questions, enter the percentage (e.g. 10.5%) of responses with each satisfaction rating (from 0 to 10). Each row must sum to 100%.

- Service reliability – level of satisfaction with this service being on time.
- Service frequency – level of satisfaction with how often this service is run.
- Service value for money – level of satisfaction with the value for money of the fare.
- Service adequacy – level of satisfaction with the number of seats provided on this service.
- Service access – level of satisfaction with ease of getting on and off this service.

- Vehicle quality – level of satisfaction with the temperature inside this service.
- Staff attitude – level of satisfaction with the helpfulness and attitude of staff on this service.
- Safety and security – level of satisfaction with personal security during this trip.
- Overall service – level of overall satisfaction with this service.
- Service information – level of satisfaction, over the last 3 months, with how easy it is to get information about routes and timetables.
- Change information – level of satisfaction, over the last 3 months, with the information provided about service delays or disruption.
- Service time – level of satisfaction, over the last 3 months, with travel time (considering the distance travelled).
- Fare payment – level of satisfaction, over the last 3 months, with how convenient it is to pay for public transport.
- Overall service – level of satisfaction, over the last 3 months, with the public transport system overall.

Other questions

In addition to the above satisfaction ratings, enter the percentage of responses for each of the following demographics. Each row must sum to 100%.

- Gender of person surveyed – percentage female or male.
- Age group of person surveyed – percentage by specified age bracket.
- SuperGold card used for the trip – percentage yes or no.

Further information

If you have any questions or require any further information, please contact the public transport team at public.transport@nzta.govt.nz. Policy and guidance is also available in the public transport framework under monitoring and review.