



Impact of Half Price Fares- Topline

Source: Waka Kotahi COVID-19 transport impact report

22 July 2022

Top-line findings – Half Price Fares

Sourced from Waka Kotahi COVID-19 Transport Impact Monitor

- An in-depth insights report for the Minister on the Impact of Half Price Fares will be provided mid August. It will include full before and after impact analysis of half price fares in the context other significant events such as PT service disruption, rising fuel prices and COVID prevalence.
- The COVID-19 Transport Impact tracker has been running periodically since April 2020. Half price fare questions in the May 2022 dip can be used in the meantime to provide some top-line insight on the impact of half price fares for the Ministers meeting in July. The full report is available here: [COVID-19 Transport Impact](#)

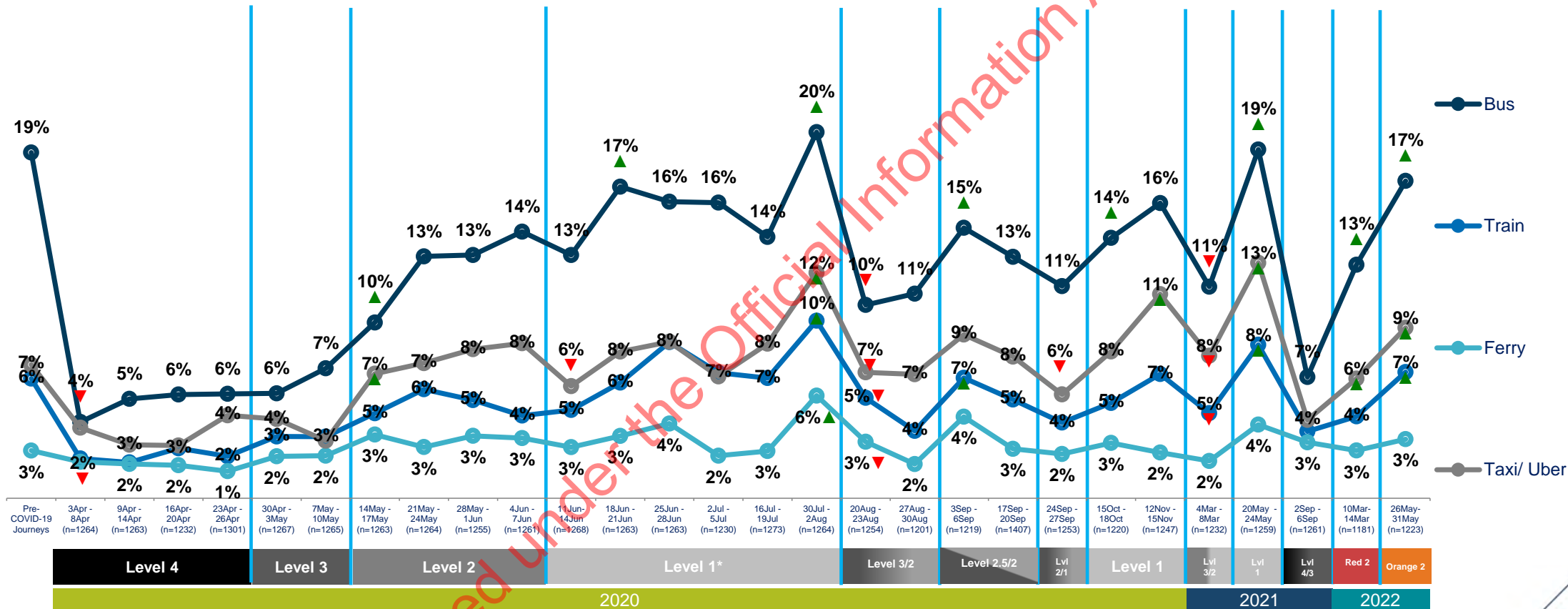
May Insights, relevant to half price fares:

- Reported weekly bus and train usage in May (Orange Level) both increased significantly since March (Red Level) to reach levels close to, but a little short of, those reported in the same period a year ago.
- It is notable that 24% of those who used PT before COVID-19, but no longer do, say that they will use public transport *more* if half price fares remain in place. These users may be enticed to return to higher frequency usage by more affordable fares, but are currently prevented by other barriers, such as concerns about transmission risks and general caution while under COVID restrictions.
- Half price fares are having some reported impact on patronage: of those travelling in the past week, a quarter say that at least one journey was taken as a result of the half price fares, with around 1-in-10 mode-shifting from private vehicles and a similar proportion shifting from active modes. Five percent took completely new journeys.
- Wellington appears to have experienced the most significant impact, with 3 in 10 travellers adding journeys due to half price fares. This was also a region that had a significant increase in weekly PT users. Outside of Auckland and Wellington, which have higher patronage and more network options, the proportion of added journeys is lower at 17%.
- There has been a corresponding shift in affordability and convenience perceptions among bus and train users, with reliability perceptions up since March. Compared to last year though, there has not been as much improvement on COVID-related factors like hygiene and distancing.



Reported weekly bus and train usage all increased significantly in the context of lighter restrictions and half price fares, but both remain lower than a year ago

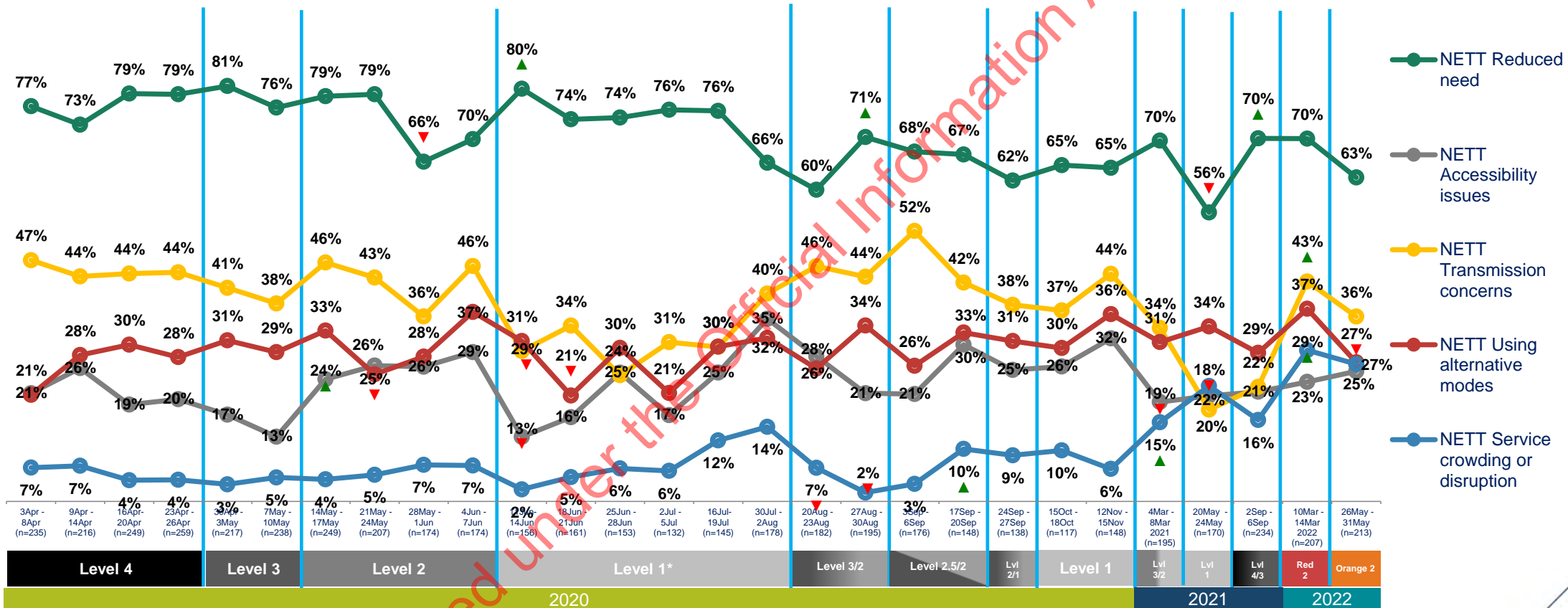
Changes in mode usage by wave



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: all adults 15+ in New Zealand in Benchmark: (n=3,759); Wave 1 – 28 (n= between 1,181 – 1,407)

Reduced need is the strongest reason for decrease in PT usage compared to pre-COVID, COVID transmission concerns rank second

Reasons for decrease in PT activity



QDEC - For which, if any of the following reasons, has your use of public transport decreased?

Base: all decreasing PT usage in past week compared to March 2020



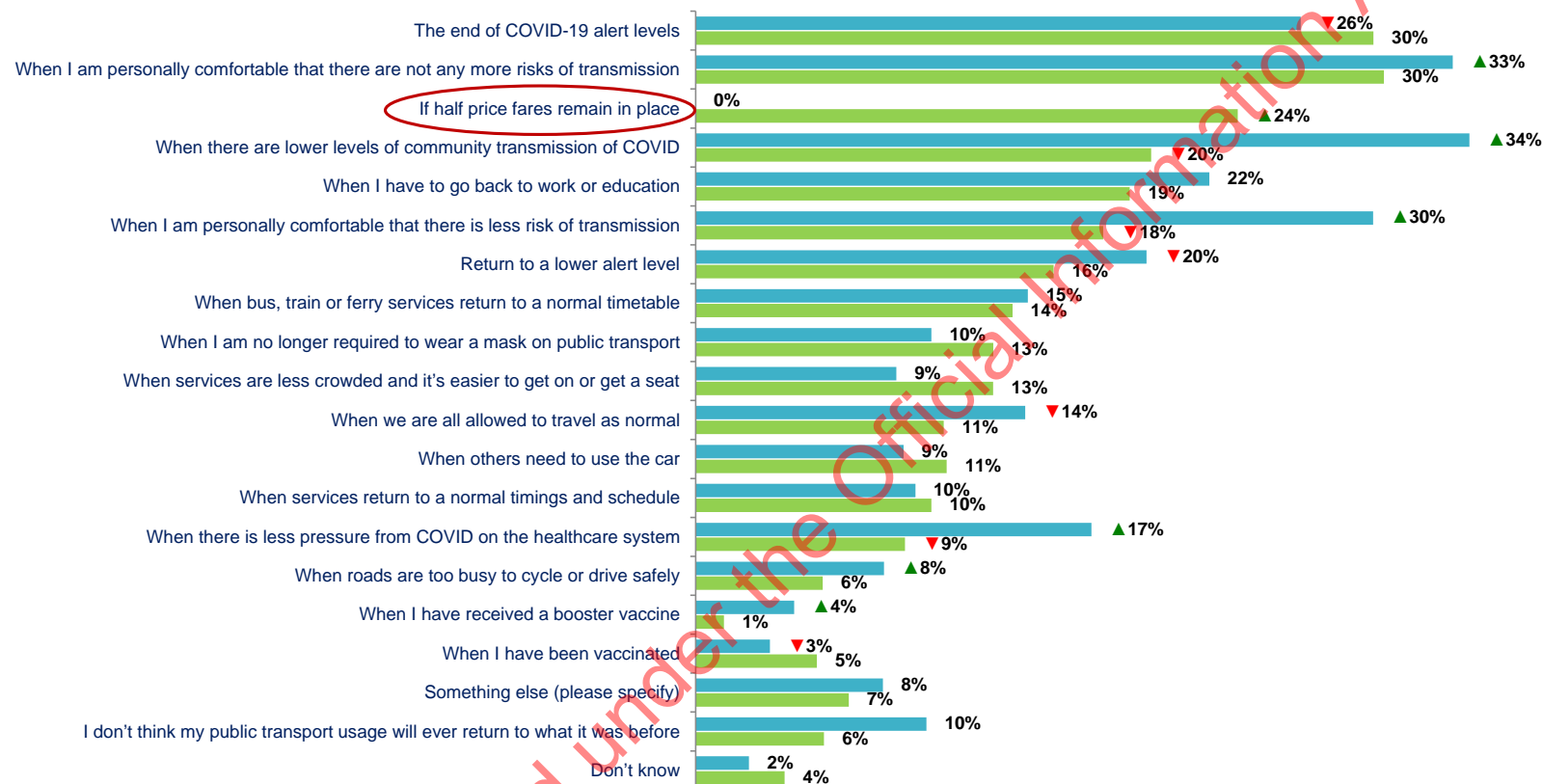
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

A quarter of those who decreased PT usage since COVID say they'll increase their PT usage if half price fares remain in place

Triggers for return to PT usage

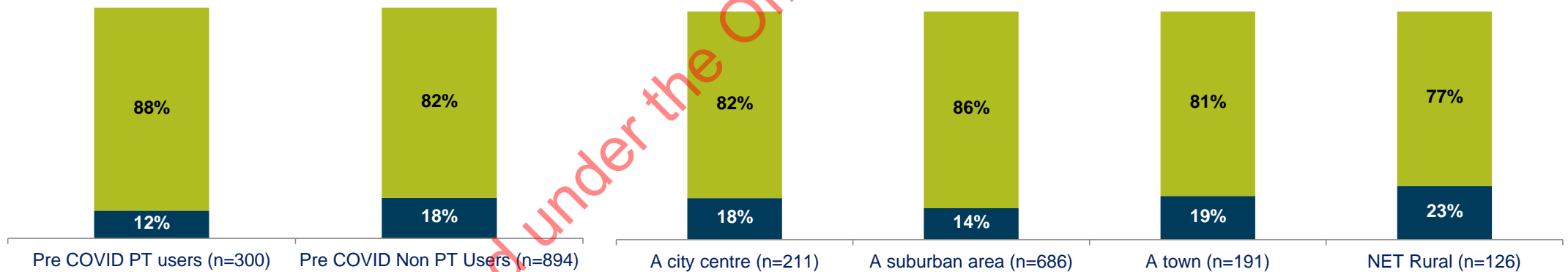
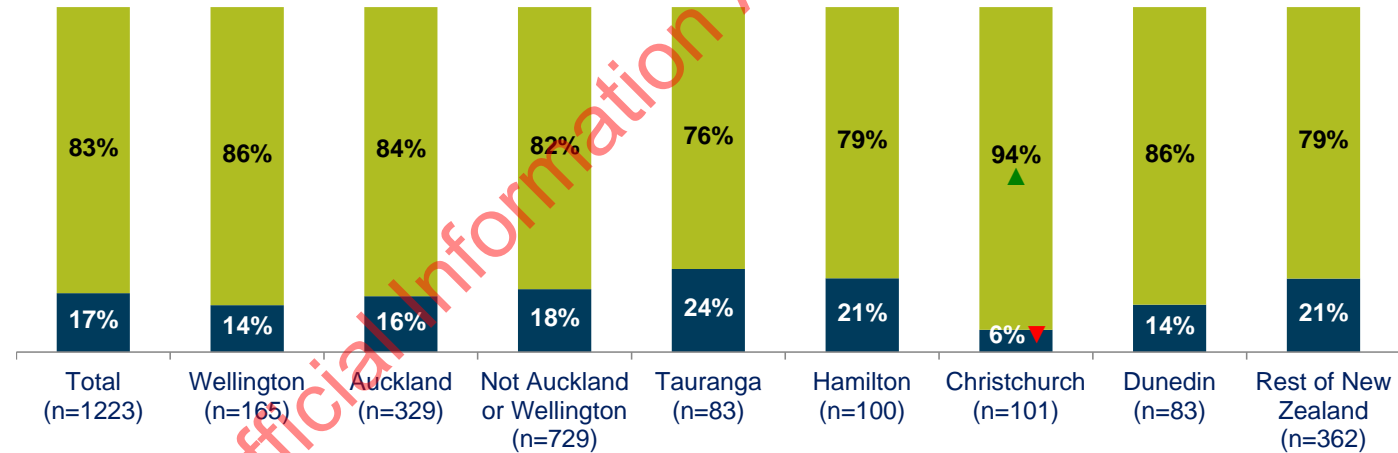
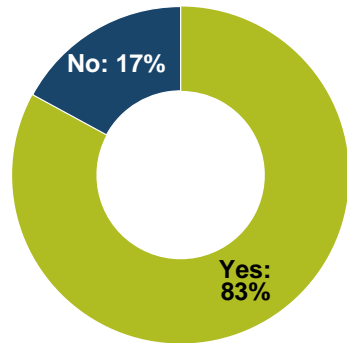


QDEC2 Which, if any of the following would encourage you to start using public transport as much as you used to?

Base: All who have decreased PT usage in past week compared to pre-lockdown frequency

Awareness of half price fares is universally high, but is slightly lower in rural areas where public transport patronage is not as common

Half Price Fare Awareness



Q6 Are you aware that on 1 April 2022 half price public transport fares were temporarily introduced nationwide?

Base: All new Zealanders 15+



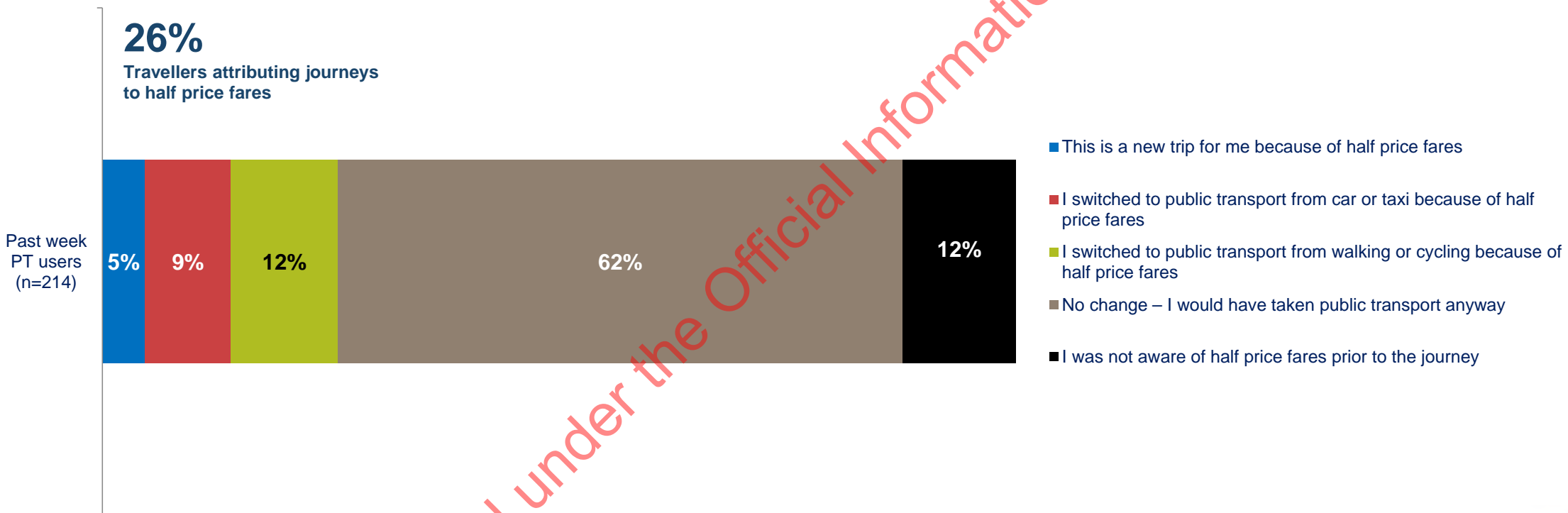
Indicates a statistically significant increase from previous time period



Indicates a statistically significant decrease from previous time period

More than a quarter of travellers have added PT journeys in the past week as a result of half price fares, with around a tenth switching from Private Vehicle

Half Price Fare impact



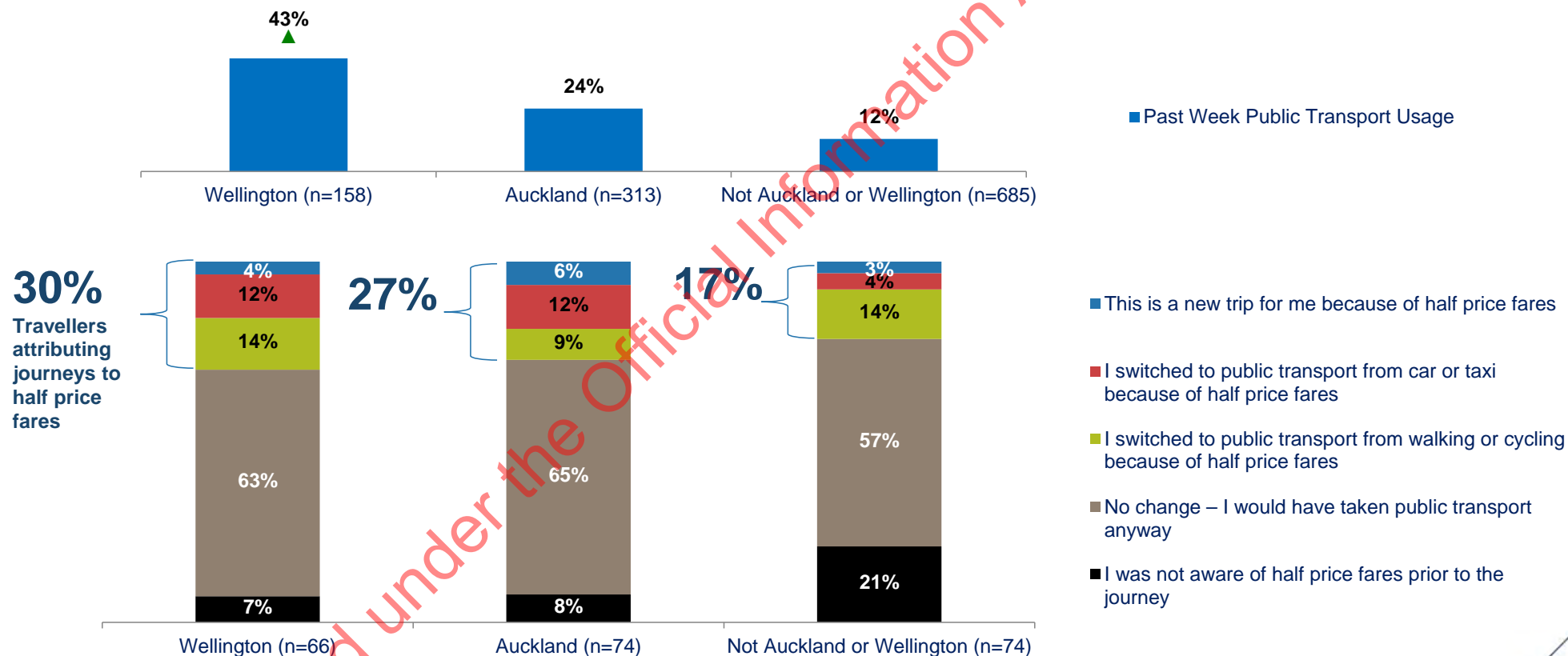
Q53d2 You mentioned that you travelled by bus, train, or ferry in the past week. Half price fares were in place during this time. Which statement best applies to your journey(s)...

Base: All past week PT users



Around 3 in 10 travellers in Auckland and Wellington say they chose PT due to half price fares, with Auckland seeing the greatest proportion of completely new travellers

Half Price Fare impact – areas with higher PT usage



Q53d2 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)...

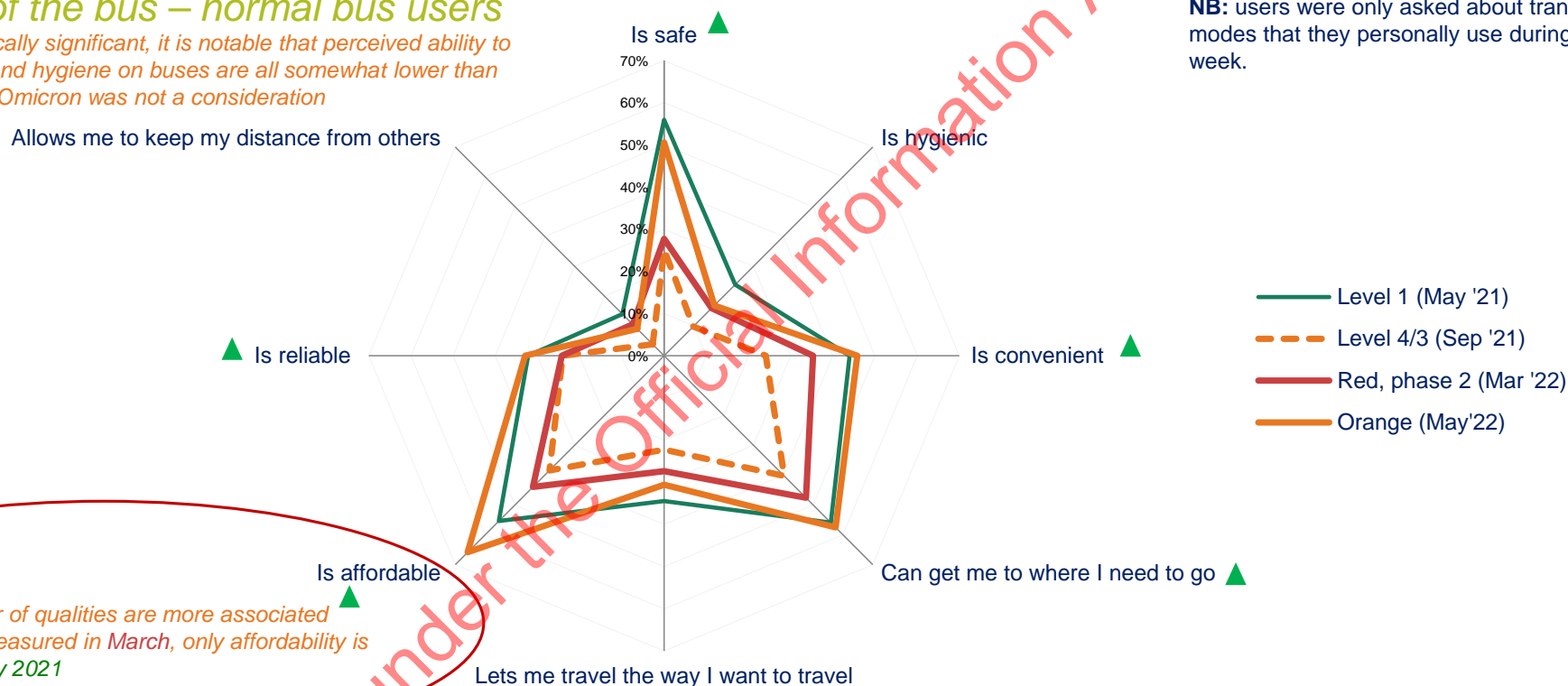
Base: All past week PT users in Each region

Among bus users, there has been a significant uplift in perceptions of services, now viewed as far more affordable, reliable and safe compared to March 2022

Perceptions of the bus – normal bus users

Whilst not statistically significant, it is notable that perceived ability to distance, safety and hygiene on buses are all somewhat lower than May 2021, when Omicron was not a consideration

NB: users were only asked about transport modes that they personally use during a normal week.



Though a number of qualities are more associated than when last measured in March, only affordability is stronger than May 2021

QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?

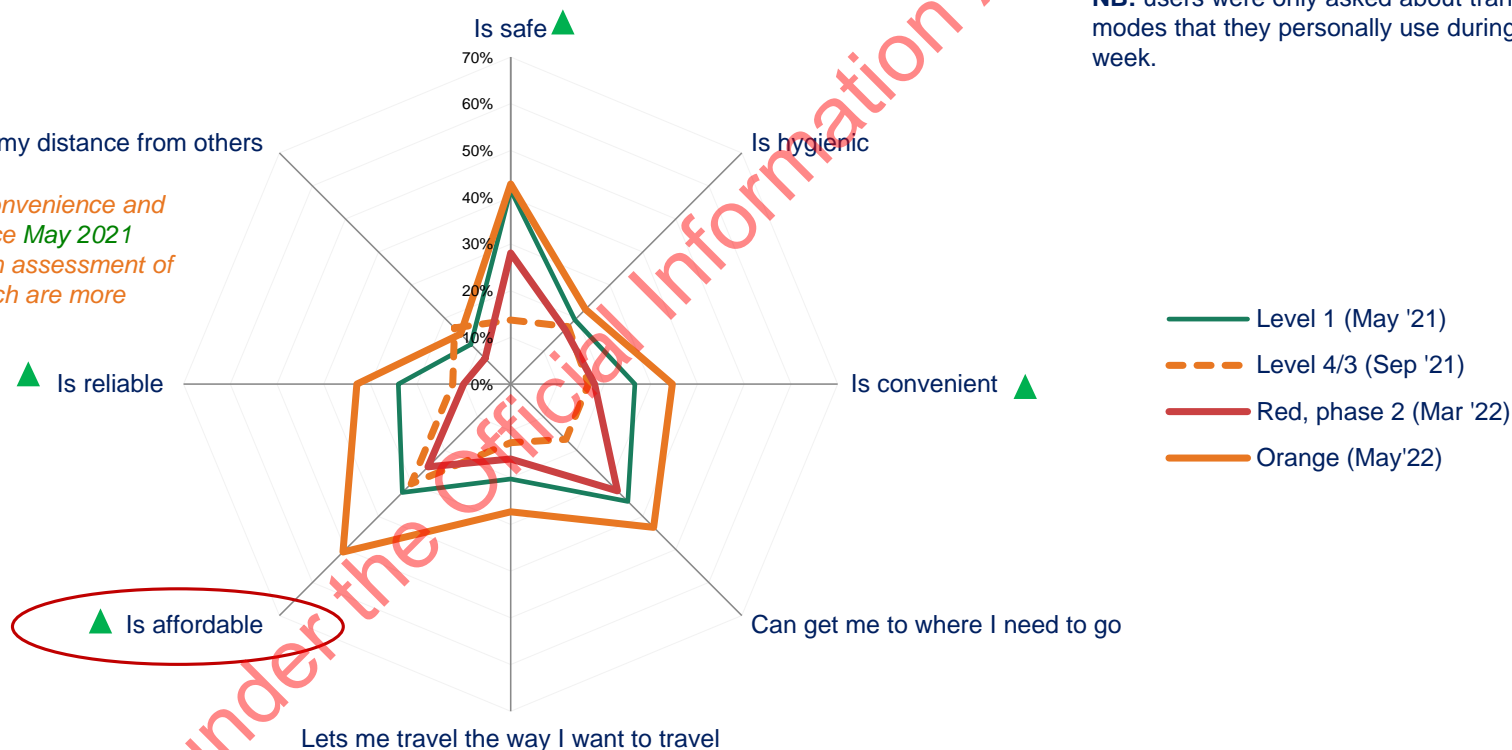
Base: New Zealanders who travel by bus normally: Level 1 May '21 (n=276), Level 4/3 Sep'21 (n=253), Red Phase 2 Mar '22 (n=257), Orange May '22 (n=273)

Train users were similarly more positive, with the proportion perceiving services as affordable, reliable or convenient all *doubling* since March

Perceptions of the train

Whilst practical assessments like reliability convenience and affordability are all improved directionally since May 2021 there has not been significant improvement in assessment of trains for safety, hygiene and distancing, which are more salient when it comes to COVID transmission

NB: users were only asked about transport modes that they personally use during a normal week.



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?

Base: New Zealanders who travel by train normally: Level 1 May '21 (n=125), Level 4/3 Sep'21 (n=113), Red Phase 2 Mar '22 (n=107) Orange May '22 (n=107)



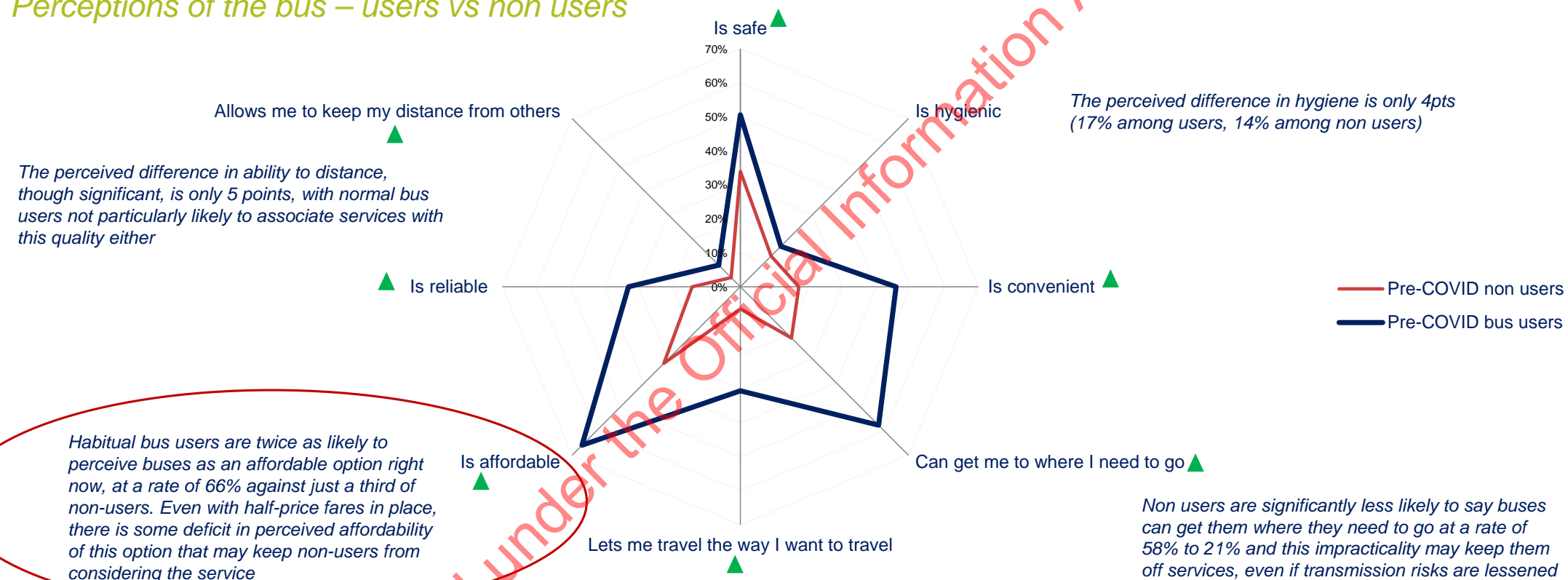
Indicates a statistically significant increase against September 2021



Indicates a statistically significant decrease against September 2021

Big differences between bus 'user' and 'non-user' perceptions of practicality, which may limit the uplift in usage available from COVID reduction and half price fares

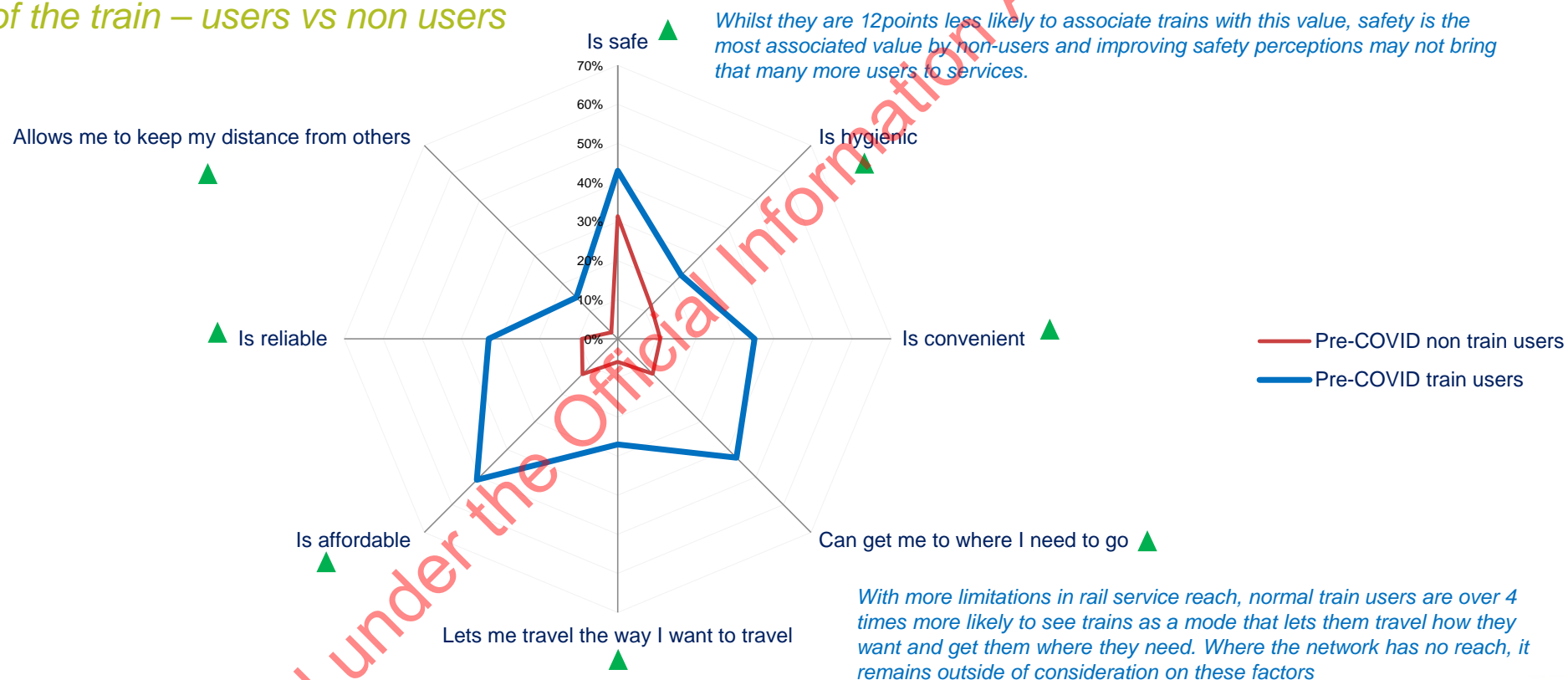
Perceptions of the bus – users vs non users



OPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?
Base: New Zealanders in May '22 who travel by bus normally (n=273); who do not travel by bus normally, but use other modes (n=921)

A similar pattern is clear when comparing train users and non users, with an even more significant deficit on practical considerations of the service

Perceptions of the train – users vs non users



QPTIMAGE. Image Statements - And which transportation methods would you currently associate with each of the following qualities?

Base: New Zealanders in May '22 who travel by train normally (n=107); who do not travel by bus normally, but use other modes (n=1,073)

About this research

COVID-19 Study purpose and importance

Introducing the Waka Kotahi NZ Transport Agency COVID-19 transport impact tracker

The **purpose of the COVID-19 Tracker** research is to understand **how travel is changing** and **why travel is changing** and evolving in response to COVID-19 on a regular basis.

The study is an online quantitative survey that is a nationally representative sample of New Zealanders 15+ years old, with a sample of $\sim n=1259$ per wave, using quotas and data weighting.

Average survey duration of between 12-15 mins

Sample structure and further definitions

		Total	Region of residence							Disability, Vulnerability and COVID-19**		
			Auckland	Tauranga	Hamilton	Wellington	Christchurch	Dunedin	Rest of NZ	Any Disability	COVID-19 Vulnerable	Aged 70 + years
Wave	Display variable		All in Auckland Region, including city and surrounding rural areas	All living in the city of Tauranga	All living in the city of Hamilton	All in Wellington Region, including city and surrounding rural areas	All living in the city of Christchurch	All living in the city of Dunedin	All living in areas outside of those noted above	See previous page	See previous page	All indicating that they are considered higher risk for COVID-19 as they are aged 70 or over
Waves 1 - 4	Sample	n= 5,060	n=1,324	n=400	n=400	n=684	n=400	n=398	n=1,454	n=550	n=1,230	n=618
	MoE*	1.38	2.69	4.9	4.9	3.75	4.9	4.91	2.57	4.18	2.79	3.94
Waves 5 - 6	Sample	n=2,532	n=662	n=200	n=200	n=418	n=200	n=200	n=652	n=297	n=597	n=315
	MoE*	1.95	3.81	6.93	6.93	4.79	6.93	6.93	3.84	5.69	4.01	5.52
Waves 7 - 10	Sample	n= 5,043	n=1,324	n=400	n=400	n=799	n=400	n=392	n=1,328	n=611	n=1,139	n=627
	MoE*	1.38	2.69	4.9	4.9	3.47	4.9	4.95	2.69	3.96	2.9	3.91
Waves 11 – 16	Sample	n= 7,561	n=1,964	n=599	n=600	n=1,129	n=601	n=607	n=2,061	n=866	n=1,640	n=830
	MoE*	1.13	2.21	4	4	2.92	4	3.98	2.16	3.33	2.42	3.4
Waves 17 - 18	Sample	n= 2,455	n=661	n=200	n=200	n=311	n=200	n=200	n=683	n=284	n=584	n=266
	MOE*	1.98	3.81	6.93	6.93	5.56	6.93	6.93	3.75	5.82	4.06	6.01
Wave 19 - 20	Sample	n= 2,626	n=676	n=197	n=217	n=357	n=200	n=208	n=771	n=323	n=617	n=293
	MOE*	1.91	3.77	6.98	6.65	5.19	6.93	6.79	3.53	5.45	3.95	5.73
Wave 21	Sample	n= 1,253	n=331	n=100	n=100	n=175	n=100	n=87	n=360	n=132	n=317	n=162
	MOE*	2.77	5.39	9.8	9.8	7.41	9.8	10.51	5.16	8.53	5.5	7.7
Wave 22	Sample	n=1,220	n=331	n=97	n=101	n=156	n=100	n=93	n=342	n=130	n=299	n=131
	MOE*	2.81	5.39	9.95	9.75	7.85	9.8	10.16	5.3	8.6	5.67	8.56
Wave 23	Sample	n=1,247	n=331	n=86	n=100	n=165	n=100	n=100	n=365	n=142	n=305	n=141
	MOE*	2.77	5.39	10.57	9.8	7.63	9.8	9.8	5.13	8.22	5.61	8.25
Wave 24	Sample	n=1,232	n=331	n=67	n=100	n=161	n=100	n=100	n=373	n=142	n=297	n=160
	MOE*	2.79	5.39	11.97	9.8	7.72	9.8	9.8	5.07	8.22	5.69	7.75
Wave 25	Sample	n=1,259	n=331	n=100	n=100	n=194	n=100	n=100	n=334	n=187	n=311	n=133
	MOE*	2.76	5.56	9.8	9.8	7.04	9.8	9.8	5.36	7.17	5.56	8.5
Wave 26	Sample	n=1,261	n=331	n=100	n=100	n=164	n=100	n=100	n=336	n=133	n=324	n=159
	MOE*	2.76	5.39	9.8	9.8	7.65	9.8	9.8	9.8	8.5	5.44	7.77
Wave 27	Sample	n=1,181	n=331	n=68	n=95	n=117	n=100	n=95	n=375	n=140	n=299	n=144
	MOE*	2.85	5.39	11.88	10.05	9.06	9.8	10.05	5.06	8.28	5.67	8.17
Wave 28	Sample	n=1,223	n=329	n=83	n=100	n=165	n=101	n=83	n=362	n=164	n=303	n=186
	MOE*	2.80	5.4	10.76	9.8	7.63	9.75	10.76	5.15	7.65	5.63	7.19

*Margin of error is calculated at 95% confidence level based upon an estimated population of 4,978,388 as at Thursday 16 April 12:44pm.

**Sub-groups are *not mutually exclusive* as individuals may fit into more than one category (for example, some may be aged over 70 and also have a chronic respiratory condition that makes them more vulnerable to COVID-19) any such respondents within the sample would be counted in *both* applicable groups.

Disclaimer

This presentation is based on research currently being undertaken by Ipsos on behalf of Waka Kotahi NZ Transport Agency. In order to support an agile response to the unfolding COVID-19 pandemic, we are releasing regular key insights from the preliminary findings prior to this work being finalised. Please note that these deliverables have not yet been through a formal peer review process and the findings should be considered as draft

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

For more information on the Covid-19 tracker contact: carol.christie@nzta.govt.nz.