
Subject	Monthly reporting requirements for public transport authorities
Circulation	Public transport authorities
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1 Purpose

This document sets out the monthly reporting requirements for public transport authorities (PTAs) to the New Zealand Transport Agency Waka Kotahi (NZTA).

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).

2 Requirements

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

PTAs **must** email the Excel template in the required format to pt.reporting@nzta.govt.nz by the date specified above. The template will be made available on the [monitoring and review](#) webpage and includes the following five input worksheets:

- Patronage and fares
- Service performance
- Total Mobility
- Workforce and fleet
- Complaints and incidents

The Excel template requires cumulative reporting from the first month of the financial year. This means that the report will contain 12 months of data by the end of the financial year. The Excel template also includes a number of summary sheets for reviewing and checking data. The template is locked by default and must not be changed other than the input data required.

3 Definitions

3.1 Patronage and fares

The [Input_Patronage] worksheet provides for reporting of patronage and fares. The template includes the following metrics:

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

The template includes a breakdown of patronage and fare metrics using the following dimensions:

- Region – region name
- Month – reporting month
- Mode – bus, train, ferry or other. Other includes cable-cars and elevators. On-demand should be recorded as bus.
- Unit – contracted units and exempt services. Unit name must be as recorded in RPTP and be consistent with other NZTA reporting requirements relating to units. Exempt services that are integral to the public transport network, including those receiving Crown fare concessions must be included as separate units.
- Concession type – categorised as follows. Transfer boardings are to be counted as boardings within the relevant concession group.
 - Adult – standard passenger with no concession
 - Infant – passengers aged under 5
 - Child 5-12 – passengers aged between 5 and 12 (inclusive) who receive a child fare concession
 - Youth 13-18 – passengers aged between 13 and 18 (inclusive) who receive a youth fare concession
 - Youth – passengers aged between 5 and 18 (inclusive) who receive a child, youth or school fare concession where an age breakdown is not available between Child 5-12 and Youth 13-18
 - Under25 – passengers aged between 19 and 24 (inclusive) who receive an under 25 fare concession
 - CSC – Community Services Card holders, as part of the Community Connect Crown concession scheme
 - SGC – SuperGold card holders, as part of the Crown concession scheme
 - Accessibility – passengers who receive a regional accessibility or disability concession. Criteria may differ between regions
 - Tertiary – passengers who receive a regional tertiary student concession. Criteria may differ between regions. Note: if the concession receives third-party funding then this should be recorded under third-party below
 - Senior – passengers who receive a regional senior concession that is not SuperGold card. Criteria may differ between regions
 - Third-party – passengers who receive a contribution towards their fares from an employer or third-party organisation, including tertiary institutions. Reported fare revenue should only include passenger fares and not the third-party contribution (usually invoiced separately)
 - Other – passengers who receive any other type of regional concession not otherwise specified
 - Transfer – this category should not be used but is available for any regions who are unable to record transfer boardings within the relevant concession group above.
- Payment type – cash, card or unknown. Card to include all non-cash passengers, including counts and multi-trip tickets. Unknown should not be used unless the ticketing system cannot distinguish between cash and card.

- Period – peak or off-peak based on SuperGold card hours.

3.2 Service performance

The [Input_Performance] worksheet provides for reporting of service performance. The template includes the following metrics:

- Scheduled trips – number of scheduled service trips
- Operated trips – number of scheduled service trips completed in full
- Depart on time – number of services departing from origin on time. Where "on time" means services operated between 59 seconds before and 4 minutes and 59 seconds after the scheduled departure time (or arrival time at the destination)
- Arrive on time – number of services departing from origin on time and arriving at destination on time. Where "on time" means services operated between 59 seconds before and 4 minutes and 59 seconds after the scheduled departure time (or arrival time at the destination)
- Reported cancellations – number of scheduled service trips not operated
- Scheduled service-kms – total service-kms from scheduled service trips
- Service-kms operated – total service-kms operated by vehicles

The template includes a breakdown of service performance metrics using the following dimensions:

- Region – region name
- Month – reporting month
- Mode – bus, train, ferry or other. Other includes cable-cars and elevators. On-demand should be recorded as bus
- Unit – contracted units and exempt services. Unit name must be as recorded in RTPP and be consistent with other NZTA reporting requirements relating to units. Exempt services that are integral to the public transport network, including those receiving Crown fare concession must be included as separate units.

3.3 Total Mobility

The [Input_TM] worksheet provides for reporting of Total Mobility. The template includes the following metrics:

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

The template includes a breakdown of service performance metrics using the following dimensions:

- Region – region name

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

Note: Detailed transaction data is not required to be reported.

3.4 Workforce and fleet

The [Input_Operations] worksheet provides for reporting of workforce and fleet. The template includes the following metrics:

- Workforce – number of full time equivalent (FTE) staff

FTE – the calculation of FTE is an employee's scheduled hours divided by the employer's hours for a full-time workweek. For the purposes of calculating FTE, 40 hours per week is deemed to be one full-time equivalent person.

Staff – for bus, staff means bus drivers only. For train, this means train drivers and on-board staff (train managers and passenger operators) only. For ferry, this means skippers and deckhands only.

 - Actual establishment – Total FTE staff available to provide public transport services at the time of reporting.
 - Target establishment – Total FTE required to sustainably deliver efficient and reliable public transport services over time. This includes sufficient staffing levels that enables sustainable workloads, participation in training and development opportunities and ensures staff can utilise break and leave entitlements.
- Fleet – 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:
 - Bus:
 - i. Euro class III – Total number of Euro class III buses
 - ii. Euro class IV – Total number of Euro class IV buses
 - iii. Euro class V – Total number of Euro class V buses
 - iv. Euro class VI+ – Total number of buses Euro class VI or greater
 - v. Zero emission – Total number of zero emission buses
 - vi. Other – Any other types of vehicles used in providing contracted public transport services in the region.
 - Train:
 - i. EMU – An electric multiple unit (number of 2 or 3 car consists)
 - ii. IPEMU – An individually powered electric multiple unit
 - iii. Other – Locomotive hauled or other propulsion (number of passenger carriages)
 - Ferry:
 - i. Zero emission – Total number of zero emission vessels
 - ii. Other – Total number of vessels

The template includes a breakdown of operator metrics using the following dimensions:

- Region – region name
- Month – reporting month
- Mode – bus, train, ferry or other. Other includes cable-cars and elevators. On-demand should be recorded as bus
- Operator – name of the transport operator providing the public transport service.

3.5 Complaints and incidents

The [Input_Incidents] worksheet provides for reporting of complaints and incidents. The template includes the following metrics:

- Complaints – number of public and customer complaints, including compliments, categorised as follows:
 - Compliments – all compliments irrespective of category
 - Disruptions – complaints relating to service disruptions, cancellations, street events etc
 - Information – complaints relating to customer information, real time information, websites, client apps, paper timetables etc
 - Infrastructure – complaints relating to bus stops, shelters, interchanges, priority measures, connecting infrastructure etc
 - Network – complaints relating to timetables, route design, frequency etc
 - Operator – complaints relating to drivers, failed to uplift, red light running, early running, harsh braking etc
 - Safety – complaints relating to safety and security. Note that serious safety complaints may also be reported as incidents (refer below)
 - Ticketing – complaints relating to ticketing failures, fares and pricing etc
 - Vehicle – complaints relating to fleet, cleanliness, air conditioning failures etc
 - Other – any other complaints.
- Incidents – number of serious safety and security incidents, categorised as follows:
 - Operations – all incidents associated with the operation of public transport services, including within the workplace, staff facilities, on-board vehicles etc
 - Class 1 – events that result in a fatality, notifiable injury, illness or potential serious near hit/miss
 - Class 2 – events that result in lost time injuries or that require medical treatment and antisocial events such as theft and abusive behaviour (verbal and physical) involving staff and / or members of the public
 - Other – all other incidents associated with the public transport system, including incidents at public facilities, bus stops, interchanges etc.
 - Class 1 – events that result in a fatality, notifiable injury, illness or potential serious near hit/miss

- Class 2 – events that result in lost time injuries or that require medical treatment and events of abusive verbal or physical behaviour involving staff and / or members of the public

The template includes a breakdown of operator metrics using the following dimensions:

- Region – region name
- Month – reporting month
- Mode – bus, train, ferry or other. Leave blank for complaints and incidents that relate to the broader public transport network
- Operator – name of the transport operator providing the public transport service. Leave blank for complaints and incidents that relate to the broader public transport network or are not recorded against an operator.

4 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](#).