



PASSENGER TRANSPORT PERFORMANCE REPORT FY 2023/24

Passenger Transport Committee Update on 15 Oct 2024

PATRONAGE PERFORMANCE IN FY 2022/23 & 2023/24

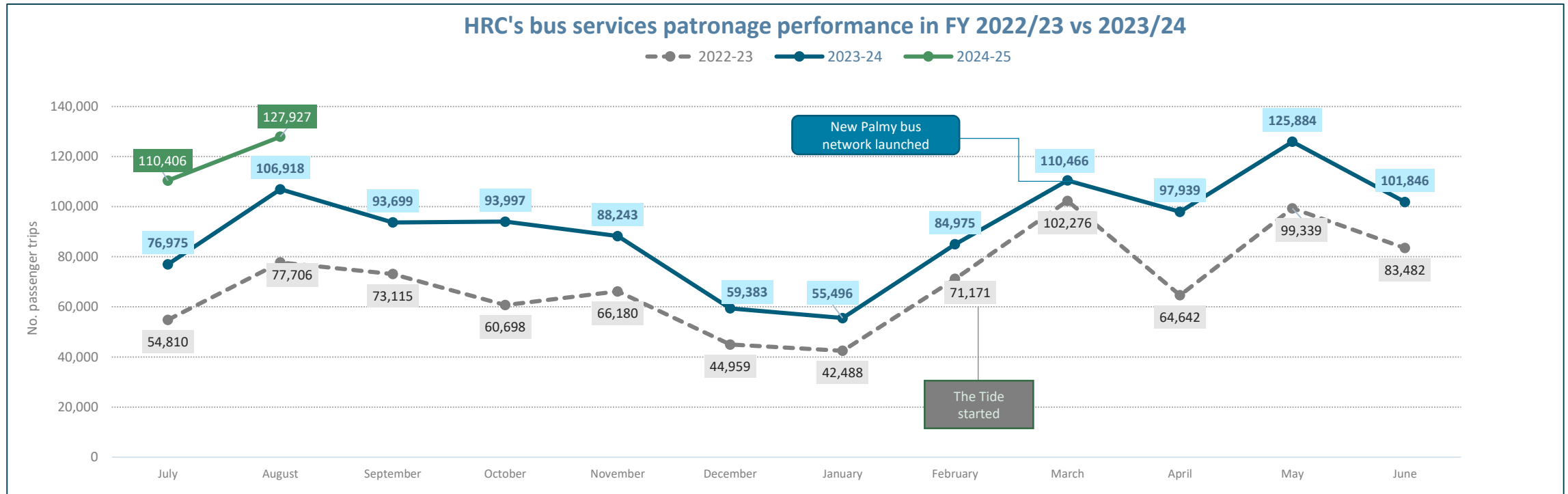


Figure 01: HRC bus services performance in two FYs (2022/23 and 2023/24)

This report covers and compares HRC bus services' patronage figures in Financial Years (FY) 2022/23 and 2023/24. However, in order to keep readers' up-to-date and having unbiased comparisons for some specific cases, patronage data of July and August in FY 2024/25 are included.

Figure 01 captures monthly patronage of HRC bus network across the last two financial years. By the end of FY 2023/24, the total of passenger trips in the network reached to 1,085,821, an increase of 254,955 trips or 30.32% on the same period of the previous FY.

Patronage growth continues to be seen across the network. Over the past two years this has been driven by new services being launched in Whanganui in February 2023 and Palmerston North in March 2024. Individual service performance is addressed later in this report.

The Horizons PT network has set several recent peaks over the past six months. First in March in line with the launch of the new Palmerston North bus network. Subsequently in May and August 2024. Patronage remains heavily impacted by school and public holidays with the troughs in patronage coinciding with these.

PATRONAGE PERFORMANCE IN THE PREVIOUS 5 FINANCIAL YEARS

The below graph captures monthly patronage performance in the last 5 FYs.

Up to August 2024, the total passenger trips of the HRC PT network has been positively growing. It is visible to see Horizons bus users have been getting back to original levels in the pre Covid-19 period. For instance, by comparing the patronage in both July and August 2024 versus the same months in 2019, the difference is minimal, around only 5%-10% difference. This is in spite of significantly lower patronage from Massey users continuing.

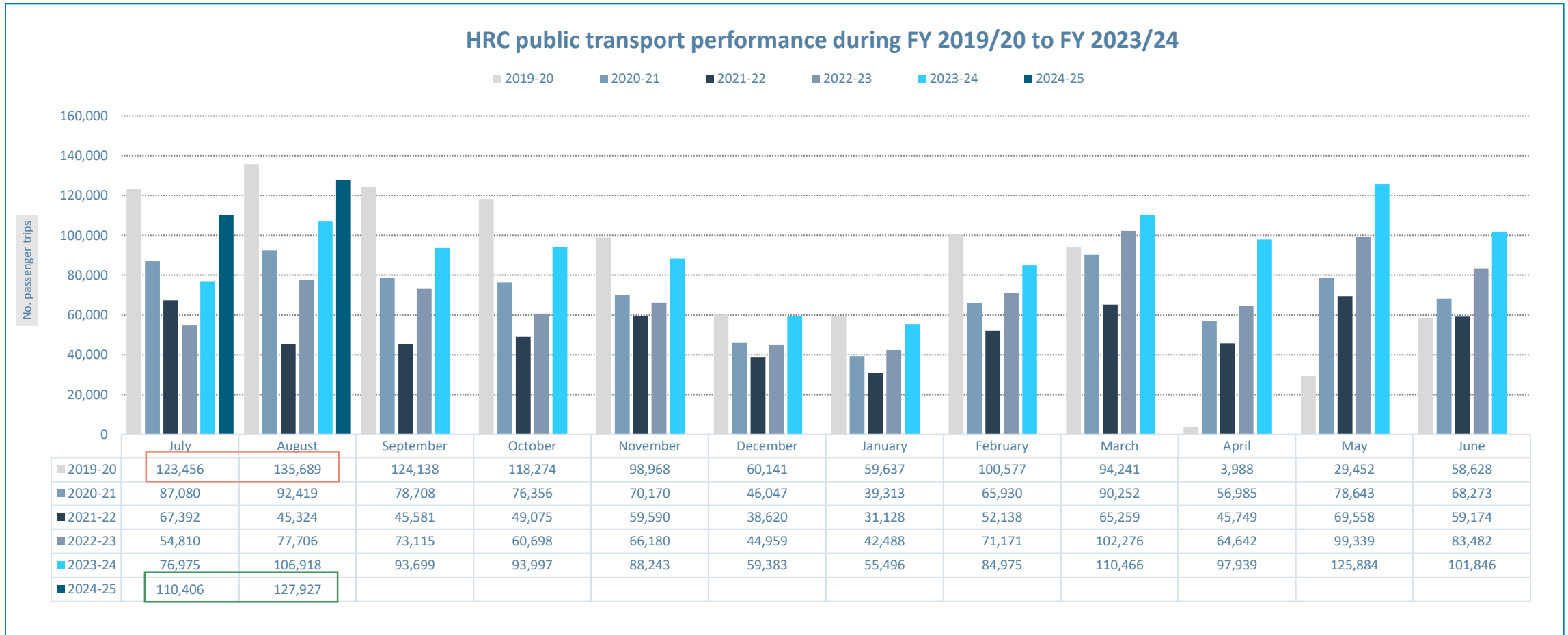
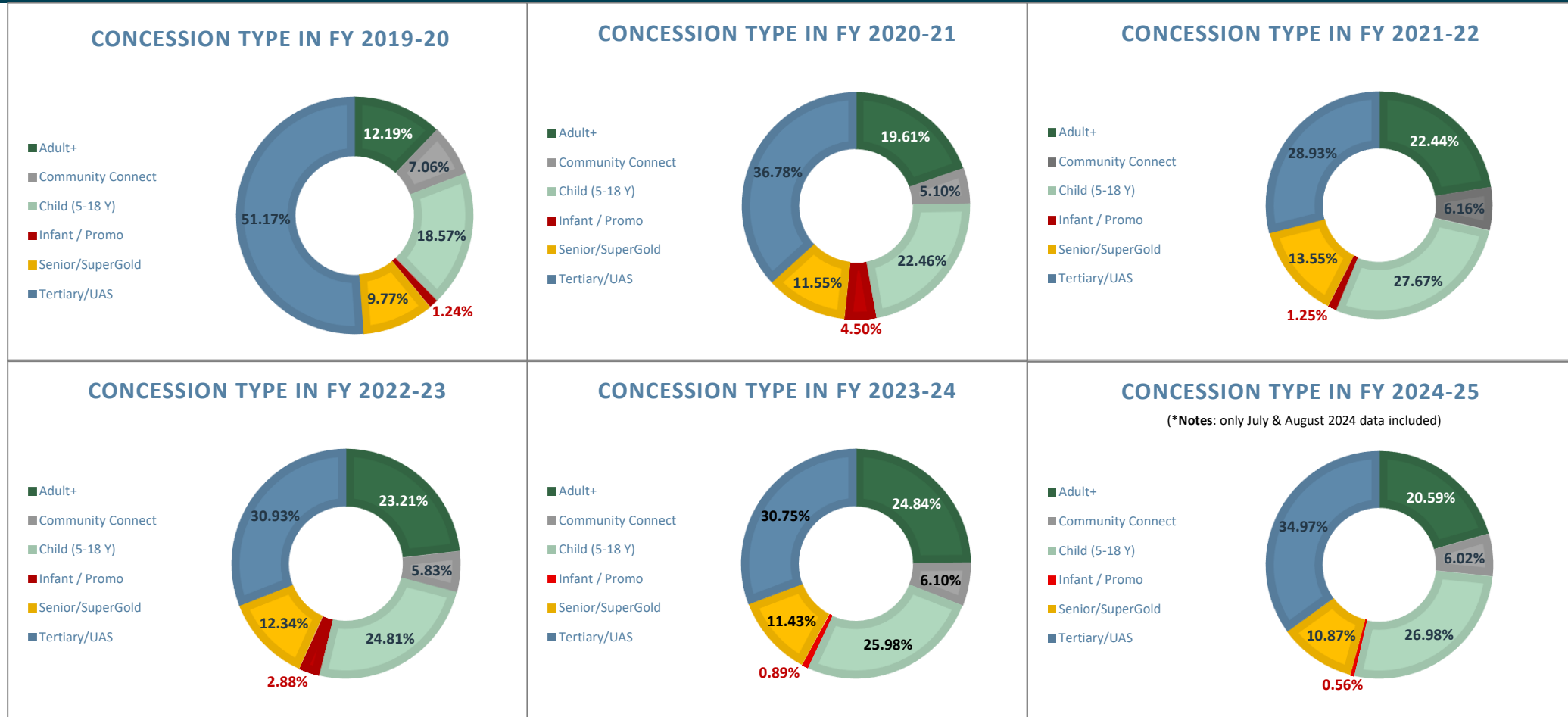


Figure 02: HRC bus services performance during the last 5 FYs.

PATRONAGE DATA BY CONCESSION TYPE IN THE PREVIOUS 5 FINANCIAL YEARS



Figures 03: HRC bus demographic from FY 2019/20 to early months in FY 2024/25

The above pie graphs show an interesting form of patronage data by ticket name or well-known as concession type for the last 5 FYs.

By reviewing percentage changes in concession types from FY 2019/20 to the early FY 2024/25 , the percentage of SuperGold and Community Connect types were relatively consistent when comparing to other concessions. Increased percentage of Child and Adult concessions, were also corresponding to patronage number increases within these bus users demographics during the last 5 Financial Years.

Regarding the Infant/Promotion concession, it was no surprise to see its highest percentage (4.50%) in FY 2020/21 due to HRC's promotional campaigns for bus users in the post-Covid recovery period.

It appears Tertiary and Unlimited Access Scheme (UAS) users have been recovering in recent FYs but have not yet reached the peak of FY 2019/20.

FEILDING BUS SERVICES IN FY 22/23 VS FY 23/24

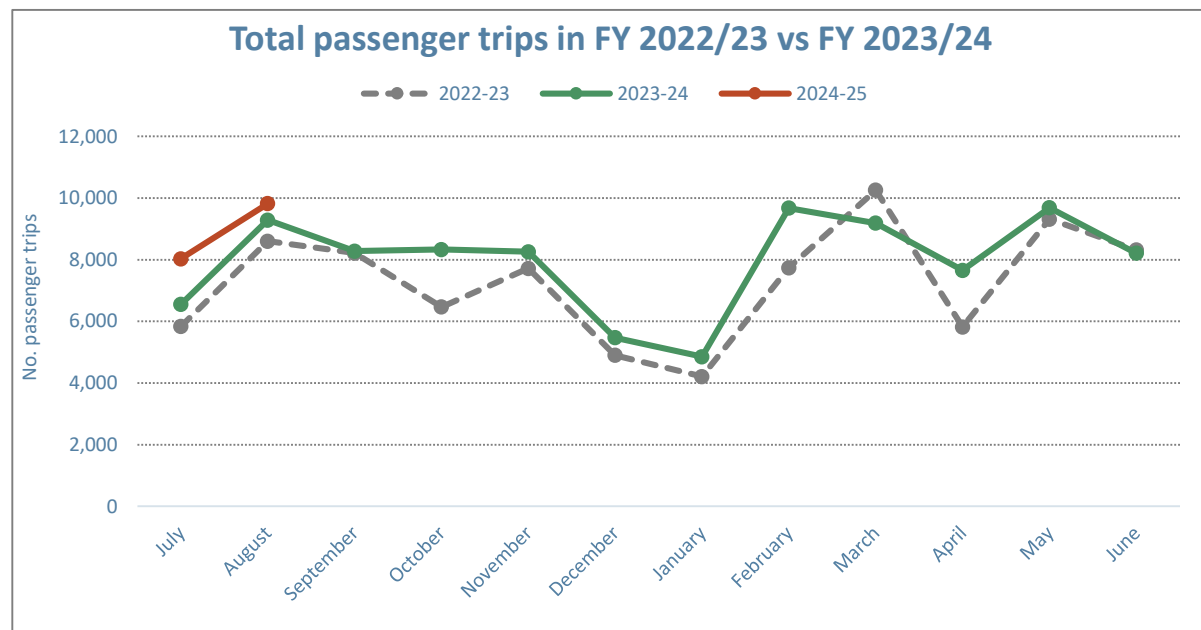


Figure 02: Feilding Orbiter and Commuter series monthly performance in FY 2022/23 vs FY 2023/24

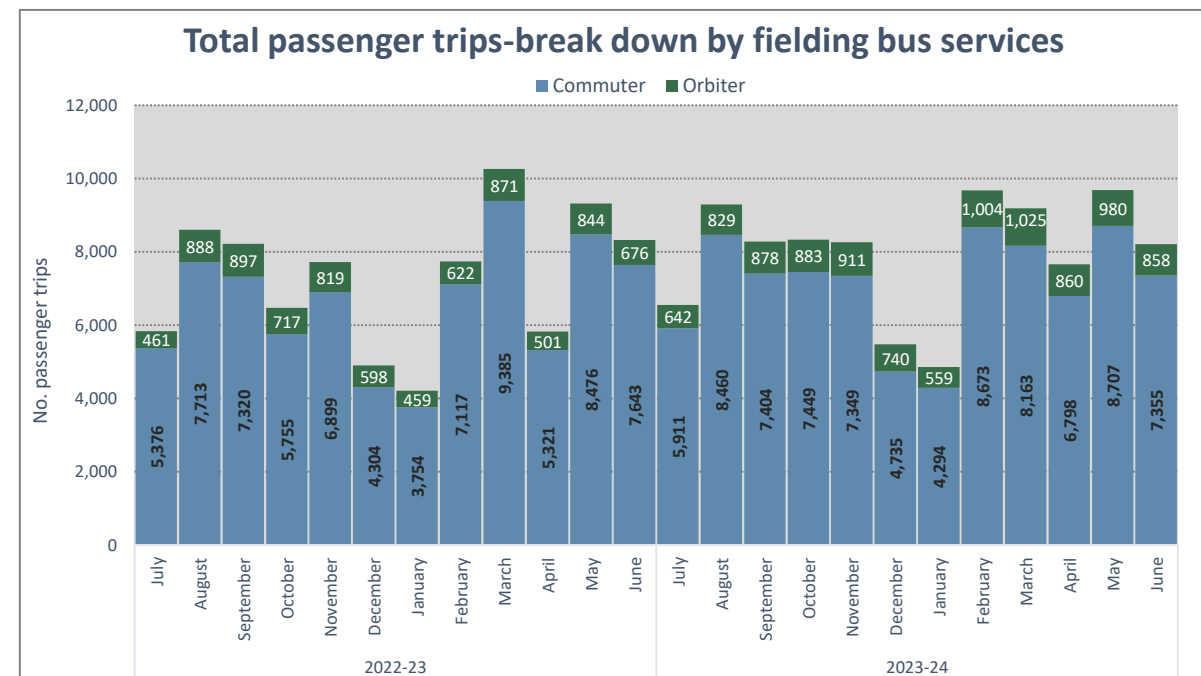


Figure 04: Feilding bus services monthly performance in FY 2022/23 vs FY 2023/24

In FY 2023/24 both the Orbiter and Commuter bus services in Feilding performed well, operating a total of 95,467 trips. This figure is more than 9% higher on the same period of last FY.

Both Commuter and Orbiter services operated slightly better than the previous year. Particularly for the Orbiter service in February and March 2024, when more than 1000 trips were recorded.

In the current FY, the Child concession still dominated the whole total bus users for Feilding services. Adult users increased and were the second highest user group in the services, followed by Senior/SuperGold users.

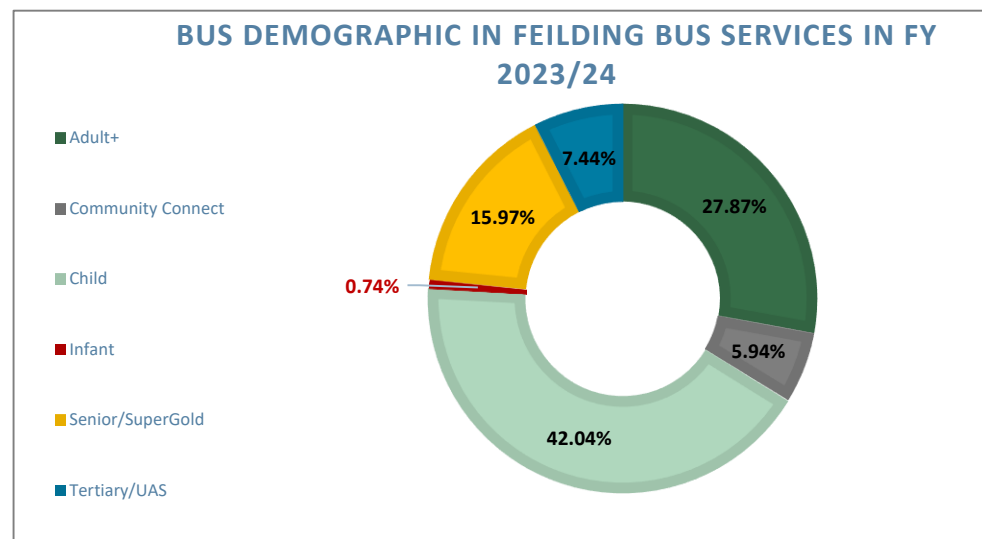


Figure 03: Feilding bus demographic in FY 2023/24

WHANGANUI BUS SERVICES IN FY 2022-23 / 2023-24

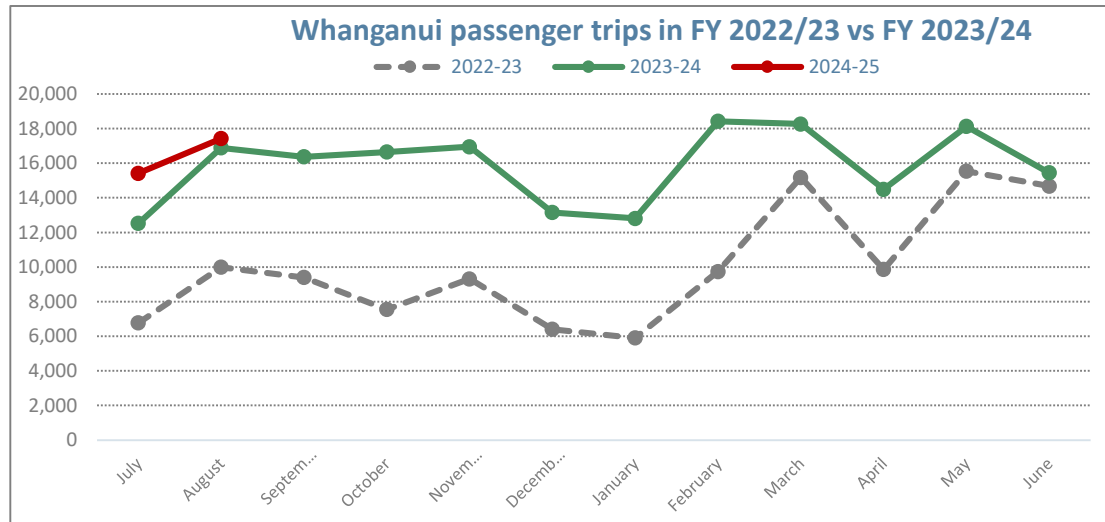


Figure 05: Whanganui bus services monthly performance in FY 2022/23 vs FY 2023/24

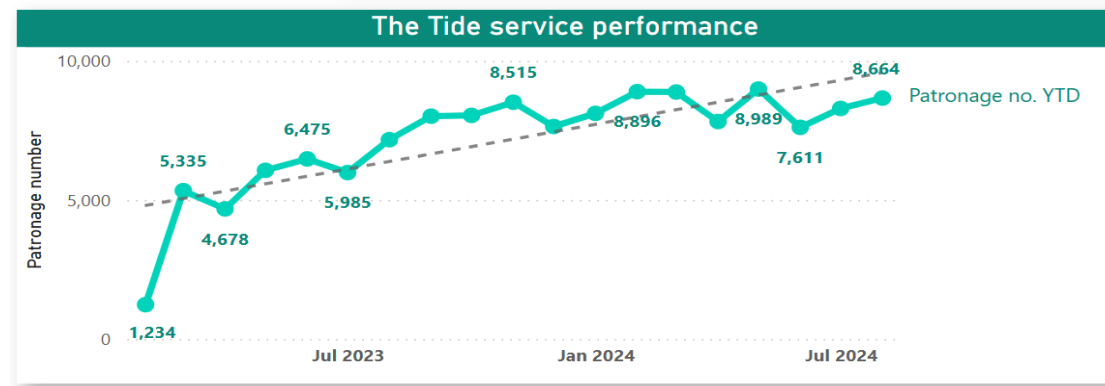


Figure 06: The Tide service monthly performance since late February-August 2024

Whanganui bus services had another successful year with total passenger trips in FY 2023/24 recording over 190,000 trips, increasing by almost 70,000 trips compared to the previous year.

The Tide bus services contributed significantly in this increase since it started late February 2023. At this stage, the Tides services account for up to 53% of the Whanganui urban bus services. The Tide has an average 8,400 passenger trips per month in 2024.

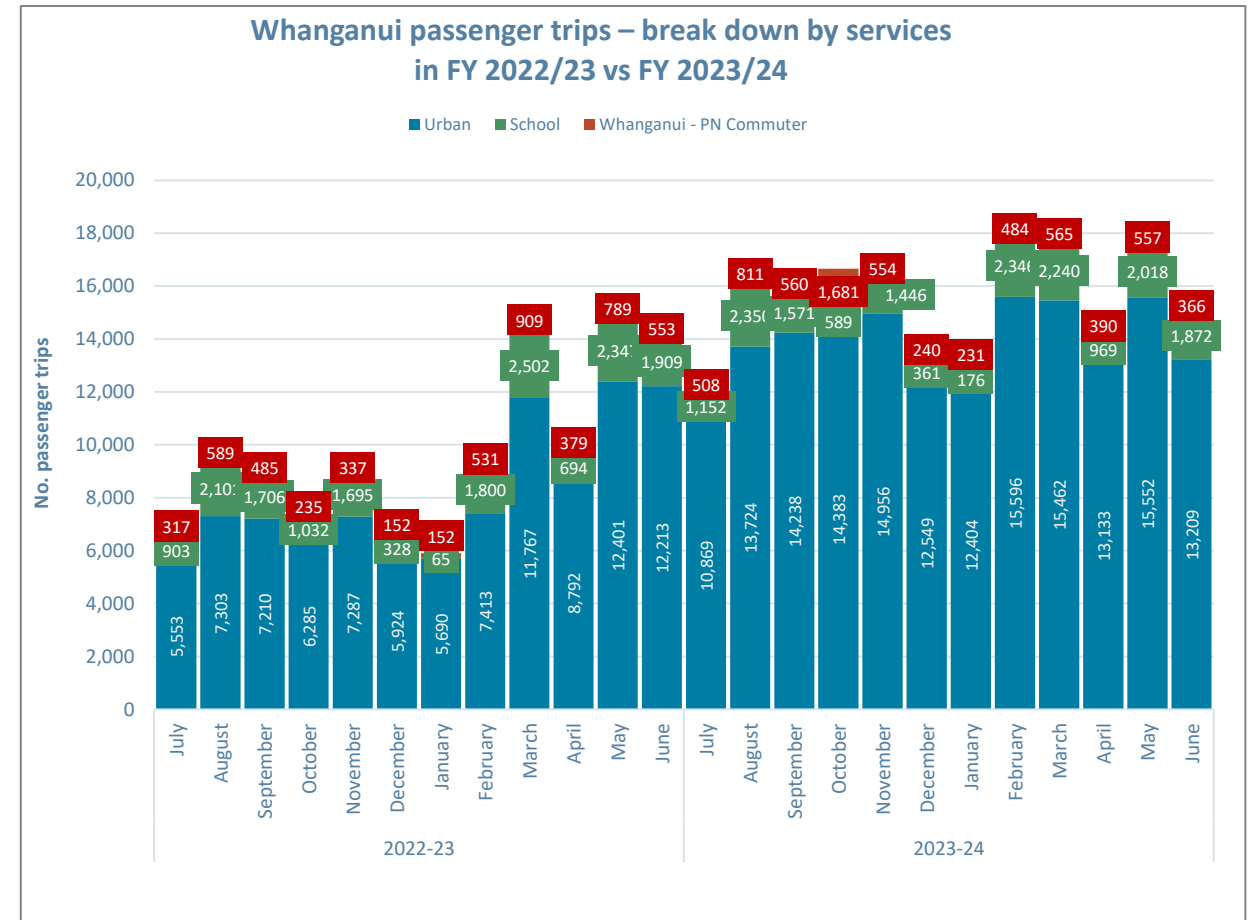


Figure 07: All Whanganui bus services (Urban, School and Commuter) monthly performance in FY 2022/23 vs FY 2023/24

Overall, all bus services (Urban, School and Commuter) had a good increase in the FY 2023/24 comparing to the same period of last FY.

WHANGANUI BUS SERVICES IN FY 2022-23 / 2023-24

BUS DEMOGRAPHIC IN WHANGANUI BUS SERVICES
IN FY 2023/24

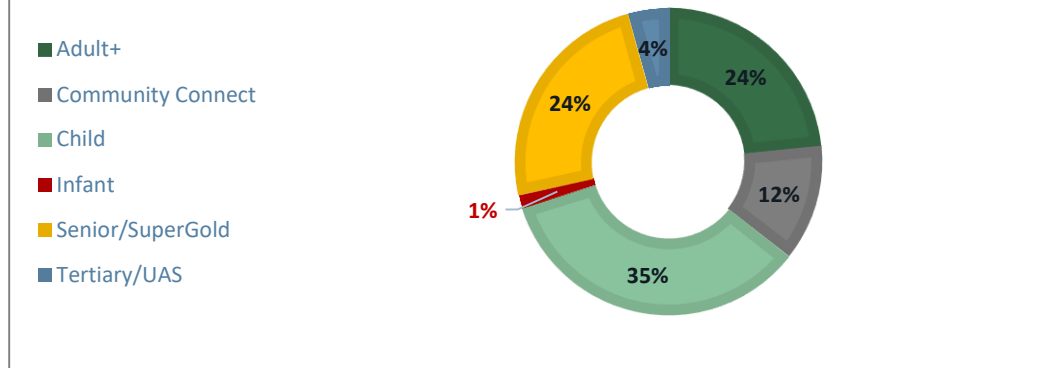


Figure 08: The Whanganui bus demographic in FY 2023/24

Time of day trend in Whanganui

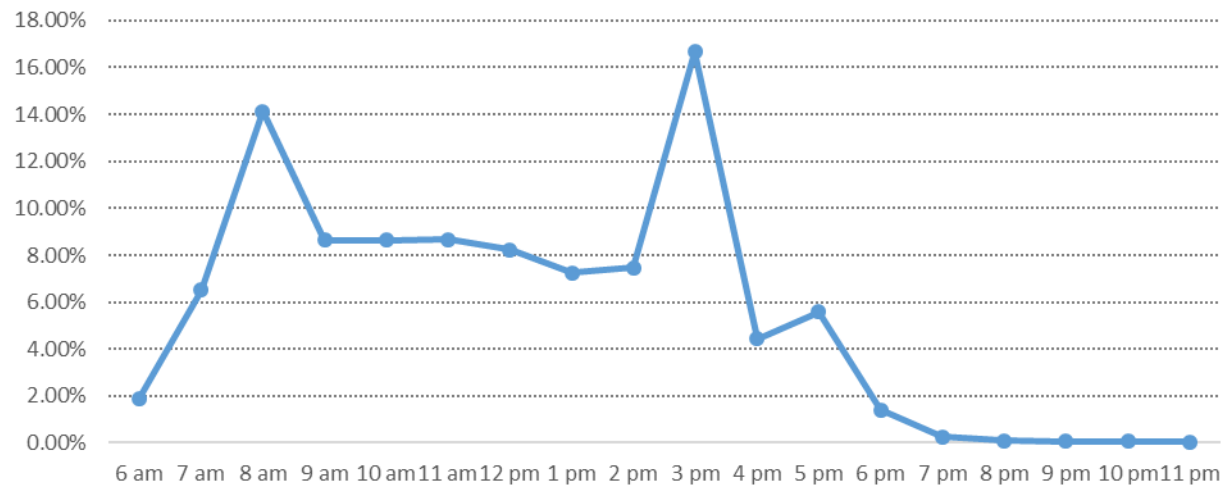


Figure 09: Trend for time of day in Whanganui in FY 2022/23 vs FY 2023/24



Child and SuperGold bus users were the dominant demographic in Whanganui bus services for this FY. They accounted for almost 60% of bus users in the network, followed by Adult and Community Connect concessions.

Trends for time of day remain consistent in FY 2023/24 comparing to FY 2022/23 with increased passenger trips across all hours of the day.

HOROWHENUA PATRONAGE PERFORMANCE IN FY 2022/23 VS FY 2023/24

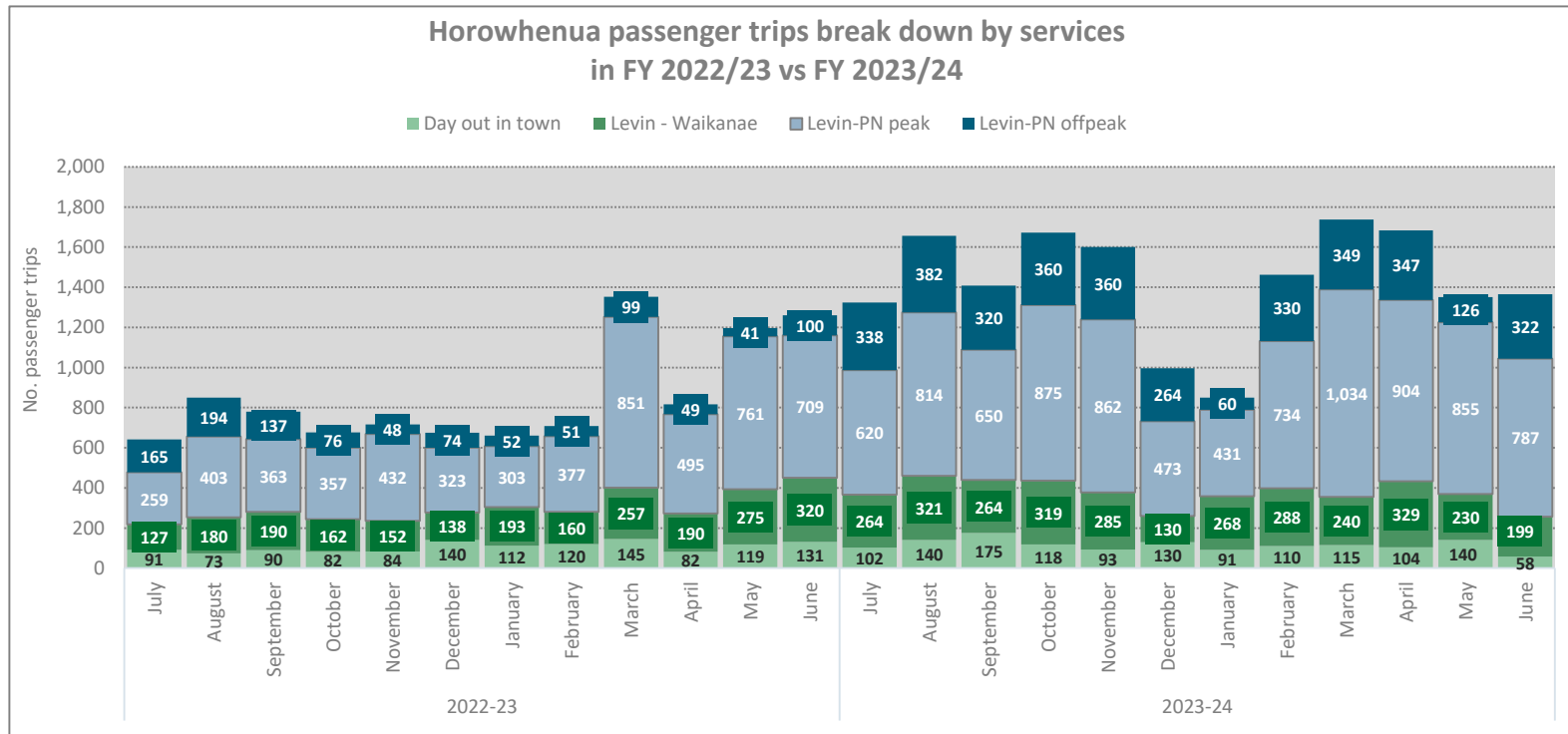
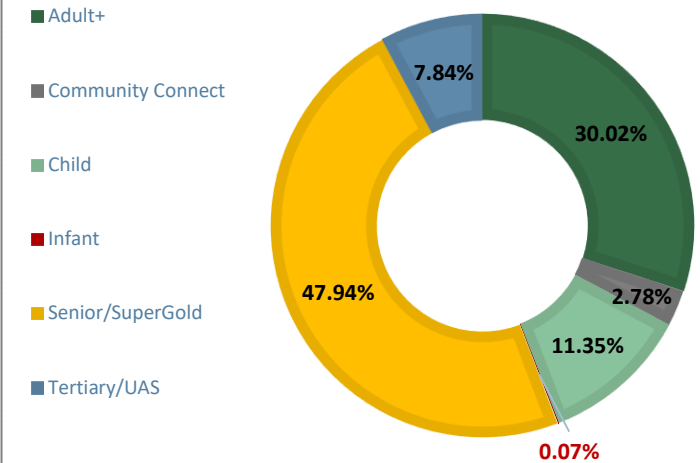


Figure 10: All Horowhenua bus services monthly performance in FY 2022/23 vs FY 2023/24 & Horowhenua bus demographic in FY 2023/24

HOROWHENUA BUS DEMOGRAPHIC IN FY 2023/24



The total patronage in Horowhenua services in FY 2023/24 showed a great increase comparing to the previous FY. More than 6,700 additional trips were recorded.

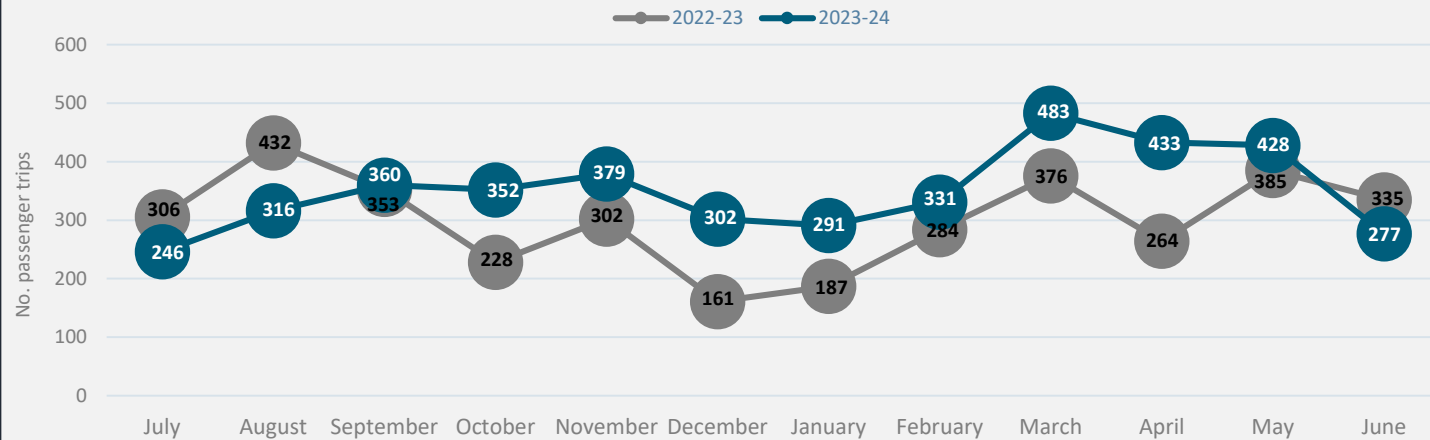
Amongst the services operating in Horowhenua, the Levin to Palmerston North bus service had the greatest performance in the FY 2023/24.

Patronage data shows:

- Overall, Levin to Palmerston North bus service is still the most popular among the services. The number of passenger trips of this service was almost double, increasing from 6,719 to 12,159 trips. It is also positive to see a good performance of Levin-Palmerston North Off-peak service in the FY 2023/24. It recorded close to 2,500 additional trips, almost 3 times higher than the previous FY.
- Passenger trips for the Levin-Waikanae bus service in the FY 2023/24 also performed well, gaining an extra 793 trips versus the same period of last FY.
- Total passenger trips on Day out in town this FY was quite similar to last FY, with a slight increase (107 additional trips).

PATRONAGE PERFORMANCE RANGITIKEI & RUAPEHU IN FY 2022/23 VS 2023/24

Rangitikei & Ruapehu passenger trips in FY 2022/23 vs FY 2023/24



Rangitikei & Ruapehu passenger trips – breakdown by services in FY 2022/23 vs FY 2023/24

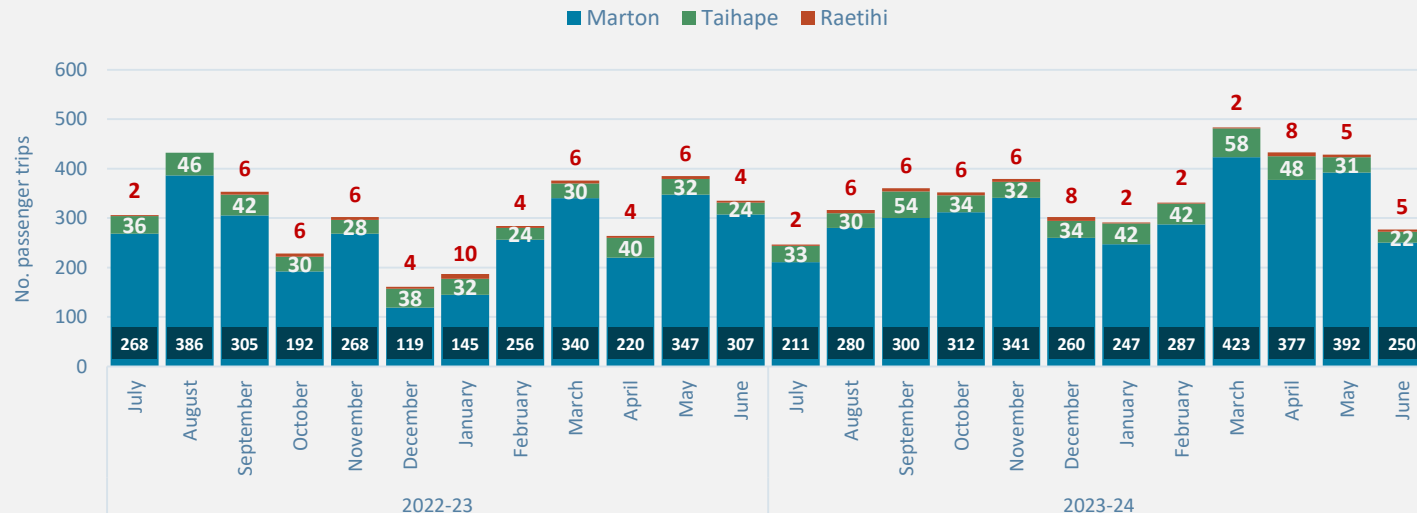


Figure 11: All Rangitikei & Ruapehu bus services monthly performance in FY 2022/23 vs FY 2023/24

RANGITIKEI & RUAPEHU BUS DEMOGRAPHIC

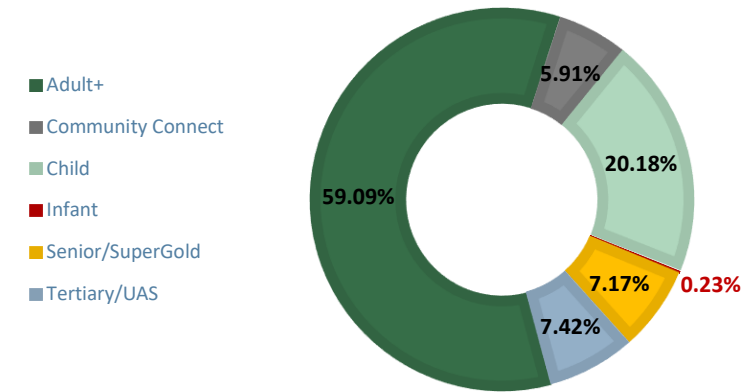


Figure 12: The Rangitikei & Ruapehu bus demographic in FY 2023/24

The total passenger trips in Rangitikei and Ruapehu during the report period was higher than last FY, with an additional 585 trips recorded in FY 2023/24 or 16.19% higher.

The Marton to Palmerston North Commuter bus service continued to be a key service for the region and had a near 16% passenger trip growth for FY 2023/24.

The total patronage figures for services, such as Taihape or Raetihi to Ohakune during July to January in FY 23/24 were similar to the figure last FY.

PALMERSTON NORTH PATRONAGE PERFORMANCE IN FY 2022/23 VS 2023/24)

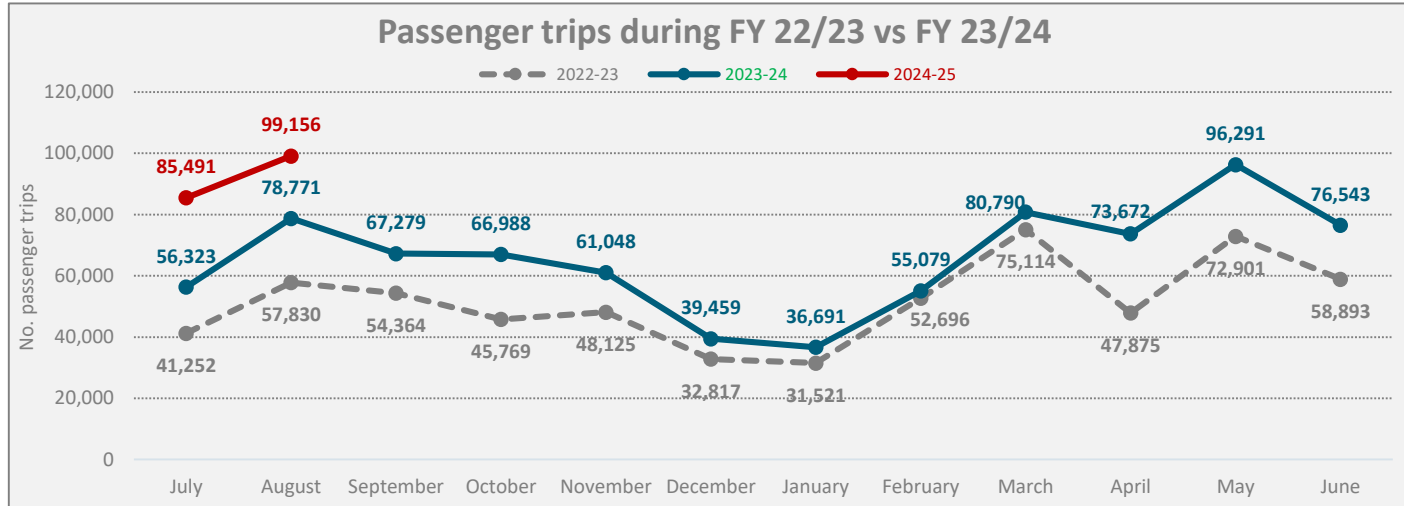


Figure 12: Palmerston North bus services monthly performance in FY 2022/23 vs FY 2023/24

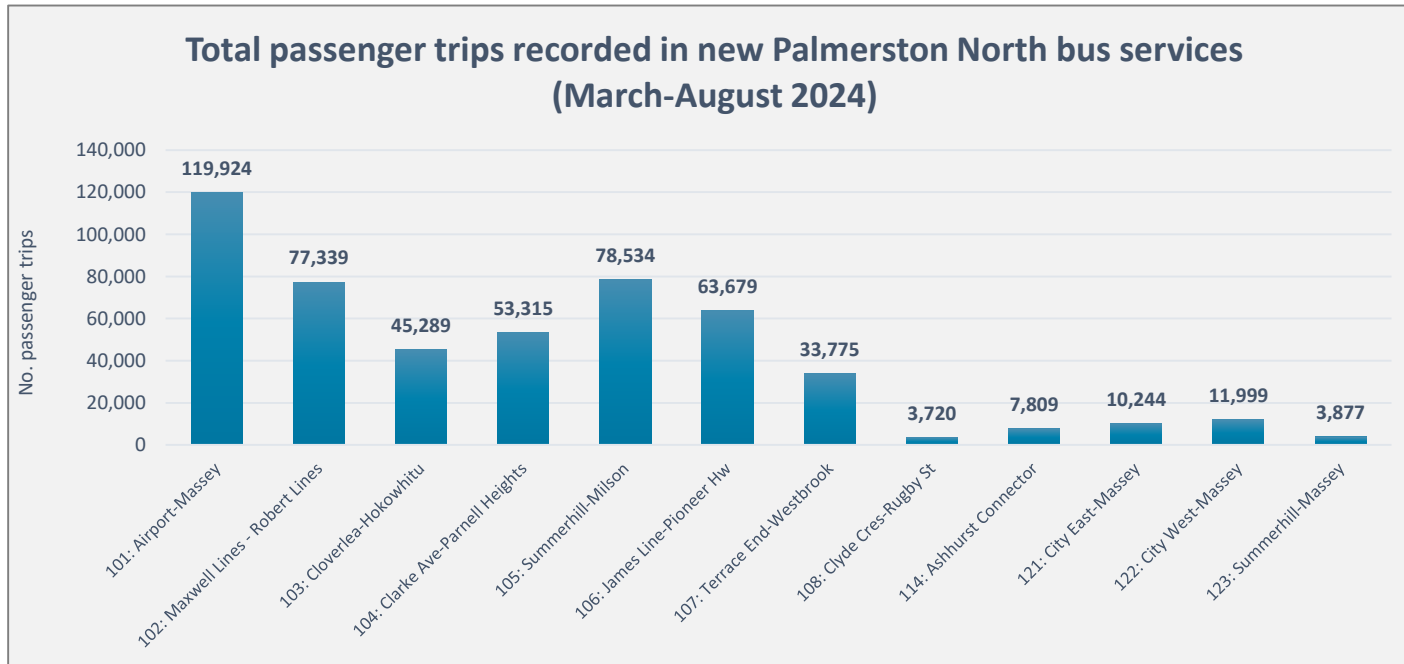


Figure 13: Passenger trips on each route in the new Palmerston North bus services from March to August 2024

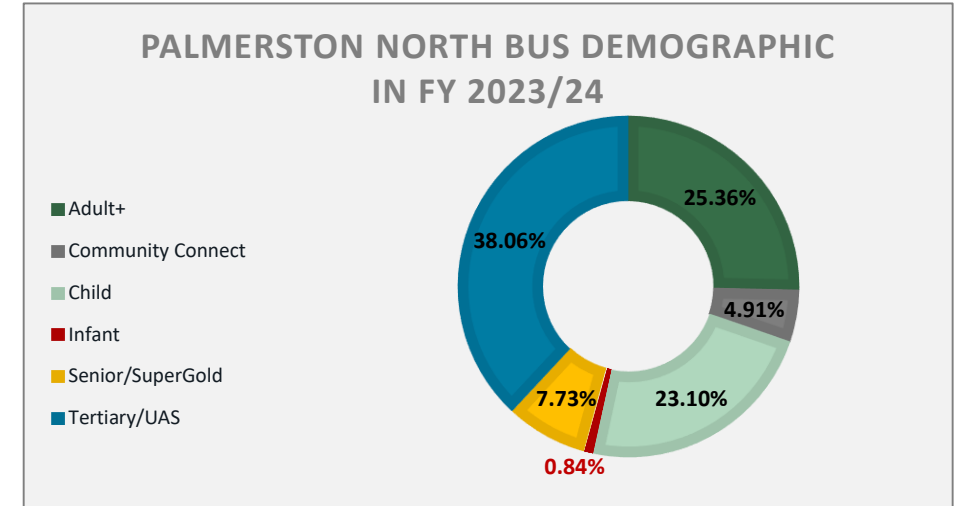


Figure 14: Palmerston North bus demographic in FY 2023/24

Passenger trips in Palmerston North services for FY 2023/24 had a significant increase compared to the same period of last year, gaining an almost additional 170,000 trips or more than 27%.

The sharp rise in Palmerston North passenger trips can be seen clearly from April 2024 onwards, when the new Palmerston North urban bus service started in March 2024.

Among all new routes, the 101 service between the Airport to Massey University has the highest bus usage, followed by 105 (Summerhill to Milson) and 102 (Maxwells Line to Roberts Line).

In the FY 2023/24, the Tertiary/UAS concession was still the dominant bus user demographic, but Adult and Child patronage are getting closer as the above pie chart indicates

PALMERSTON NORTH PATRONAGE PERFORMANCE IN FY 2022/23 VS 2023/24)

Bus boarding usages by hours in Palmerston North bus service during March-August in 2023 and 2024.

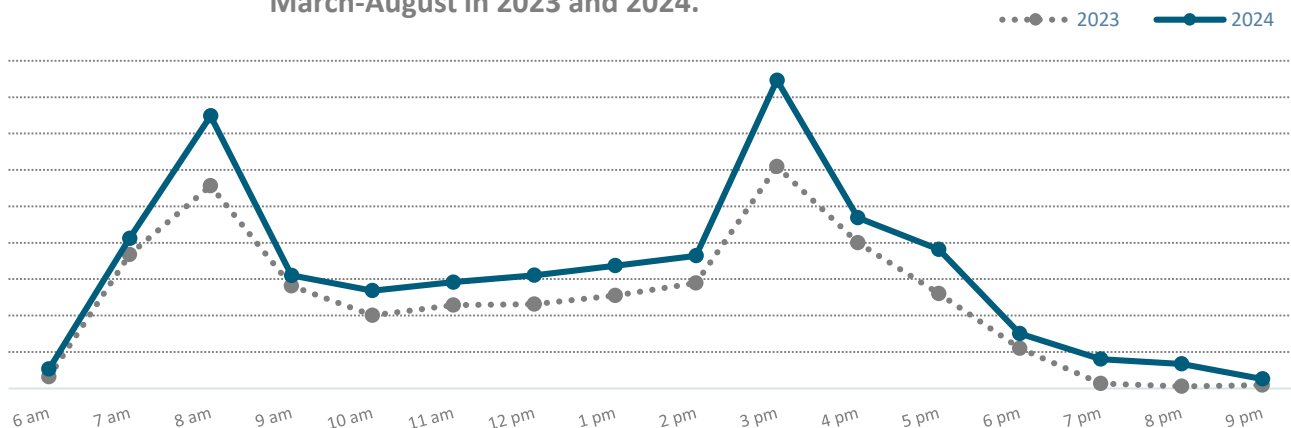


Figure 15: Trend for time of day in Palmerston North services during March-August in 2023 vs 2024 between old and new bus services

PASSENGER TRIPS BETWEEN NEW AND OLD PALMERSTON NORTH BUS SERVICES (MARCH-AUGUST 2023 VS 2024)

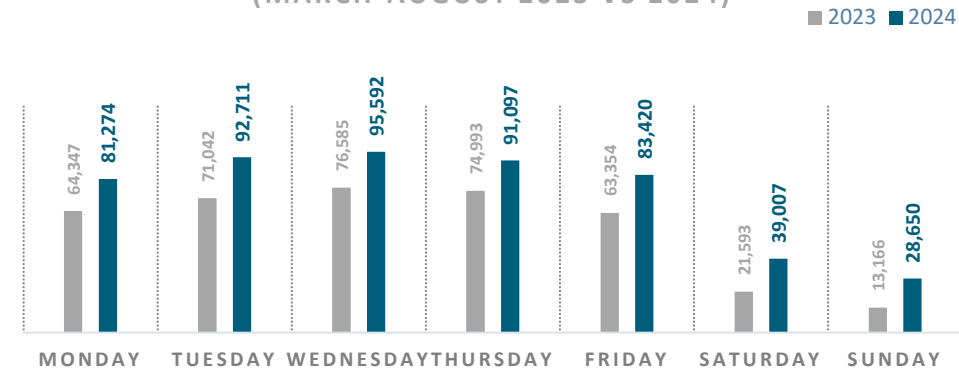


Figure 16: Passenger trips between the new and old Palmerston North services by weekdays and weekends.

Bus boarding usages by hours in Palmerston North vs other network services during March-August 2024

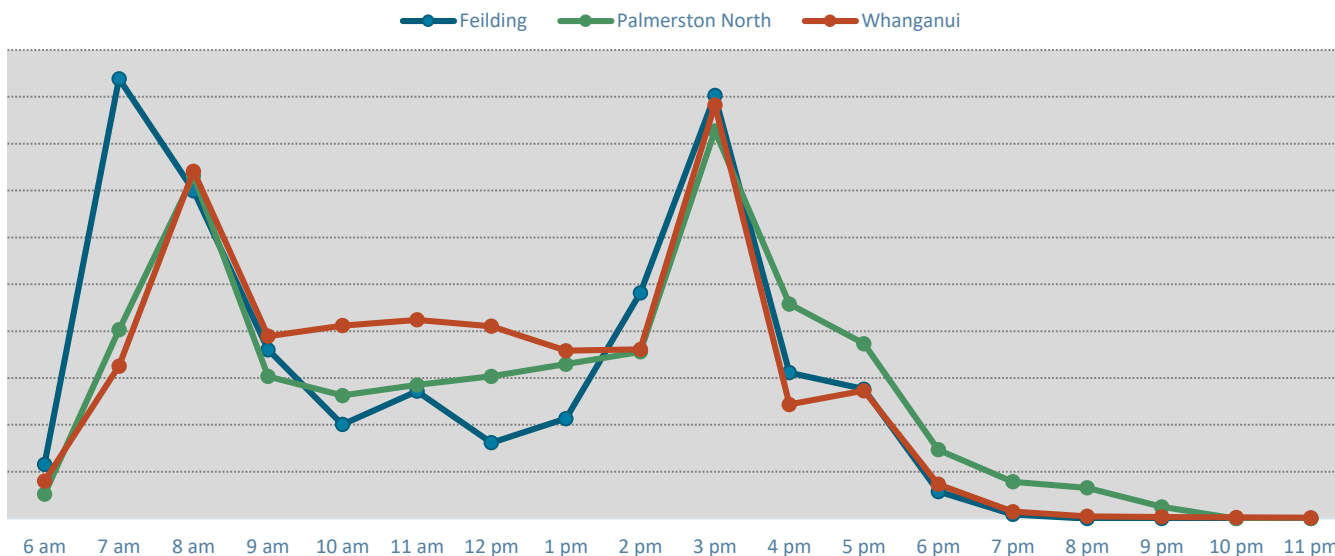


Figure 17: Trends of bus usage for time of day in new Palmerston North bus services during March-August 2024 vs other network services

March 2024 was chosen as the starting point to compare boarding bus usage data for the new and old Palmerston North network service in order to avoid an unbiased comparison.

With the increase in bus frequency, getting double the trips in weekdays and operating more trips at weekends, the recorded passenger trips data from March to August in 2023 versus 2024 shown in Figure 15 and 16 indicate not only boarding passenger trips were significantly higher during weekdays, but also weekend patronage had a good increase.

In Figure 17, the percentage of Palmerston North passenger trips show they are utilising new evening services since March this year.

BEE CARD TRANSACTIONS VS OTHER PAYMENT METHODS IN FY 2022/23 VS 2023/24)

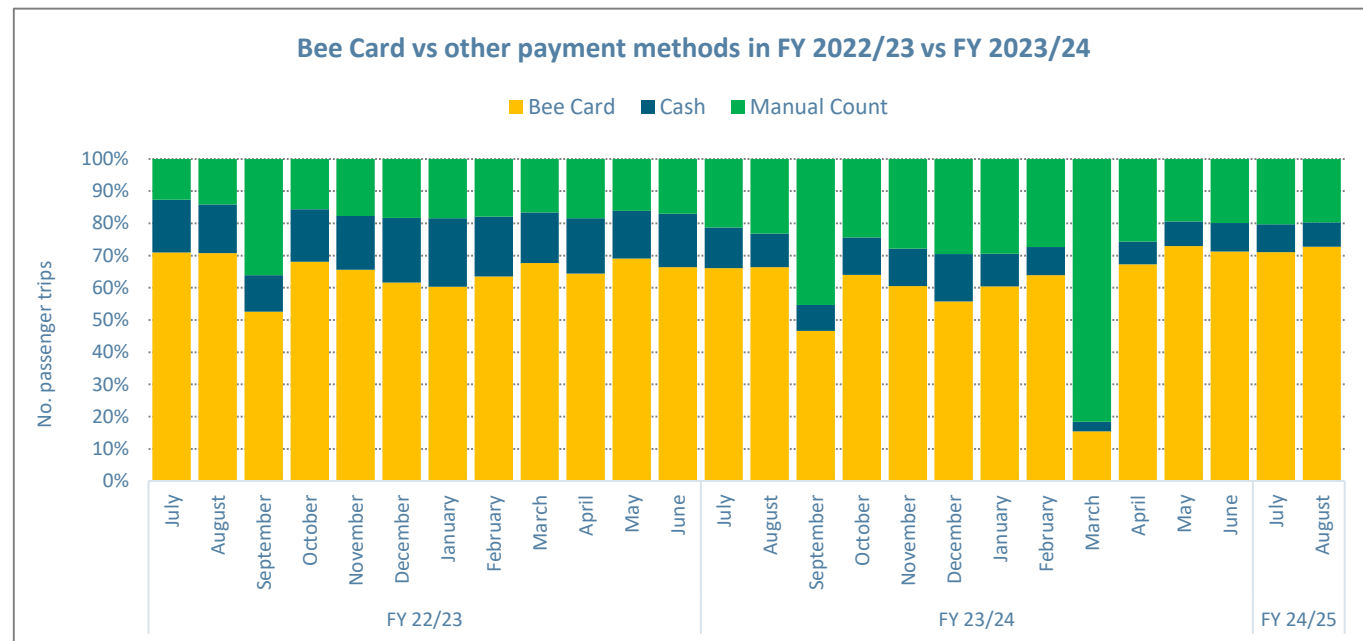


Figure 17: Bee Card vs other payment methods transactions monthly performance in FY 2022/23 vs FY 2023/24

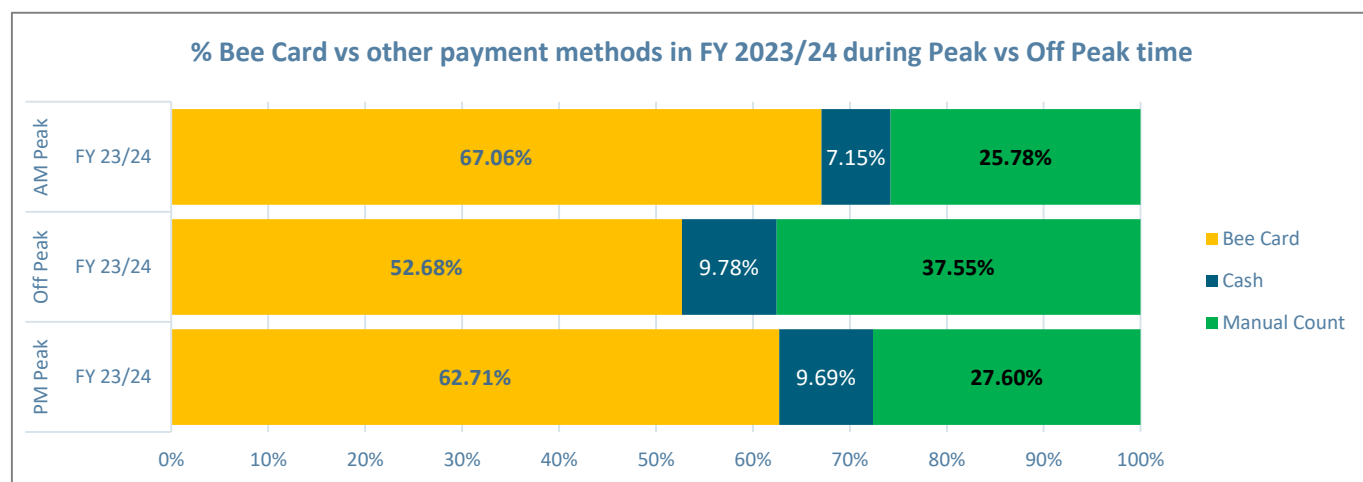


Figure 18: Bee Card vs other payment methods transactions during Peak vs Off Peak time in FY 2023/24

Payment methods	FY 2022/23	FY 2023/24	Difference
Bee Card	550,016	645,852	+ 17.42 %
Cash	136,714	99,749	- 27.04 %
Manual Count	153,335	347,261	+ 126.47%

(*) **Notes:** Count means users can get free bus services by either showing their IDs under UAS, being under certain concessions (SuperGold/Infant), or being eligible to get free fare during promotion events

Starting with Bee Card transactions, an extra 95,836 Bee Card trips were taken or an increase of 17.42%. In contrast to the Bee Card, the cash transaction was down 27.04% in the FY 2023/24. It is positive news to see this trend. Using Bee Cards equally means HRC bus users would get more benefits, such as boarding faster, having the correct concession and getting cheaper fares than using cash payments.

There was a big jump in Manual count transactions in this FY 2023/24, than last FY (126.47% increased). It is understandable as Horizons ran a few promotional campaign runs, such as free car week and free bus services when launching new Palmerston North bus services.

Figure 18 shows Bee Card transactions appear to occur during Peak time when most Adults, Child and Students travel from/to the workplace. Whilst a lot of Manual count transactions appears to happen during Off-peak time because more SuperGold passengers travelled in this period.

FARE CAPPING STATISTIC-WEEKLY LEVEL

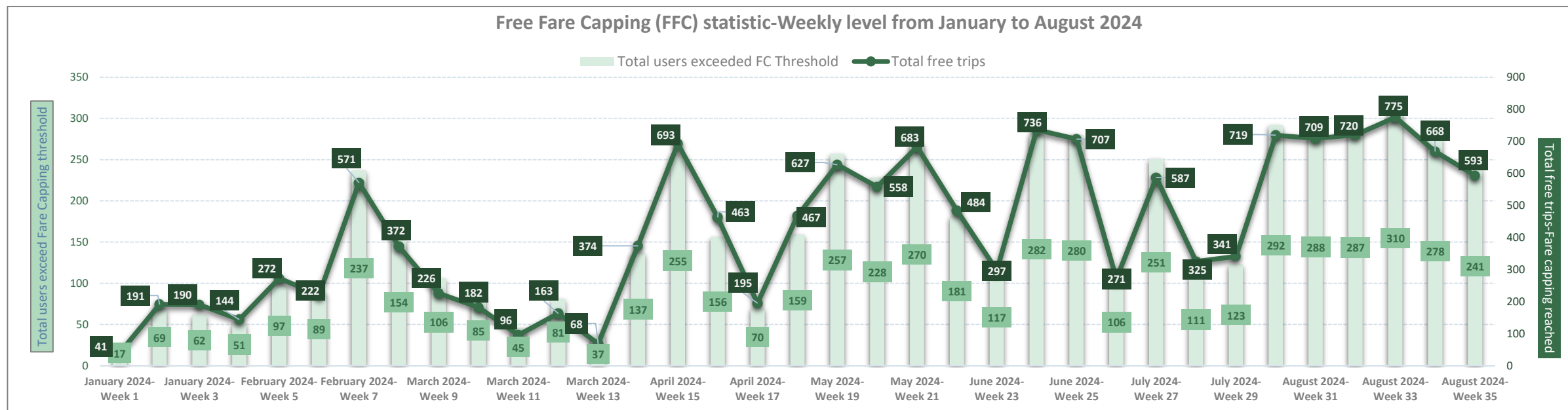


Figure 19: Free fare capping statistic in HRC bus services from January-August 2024

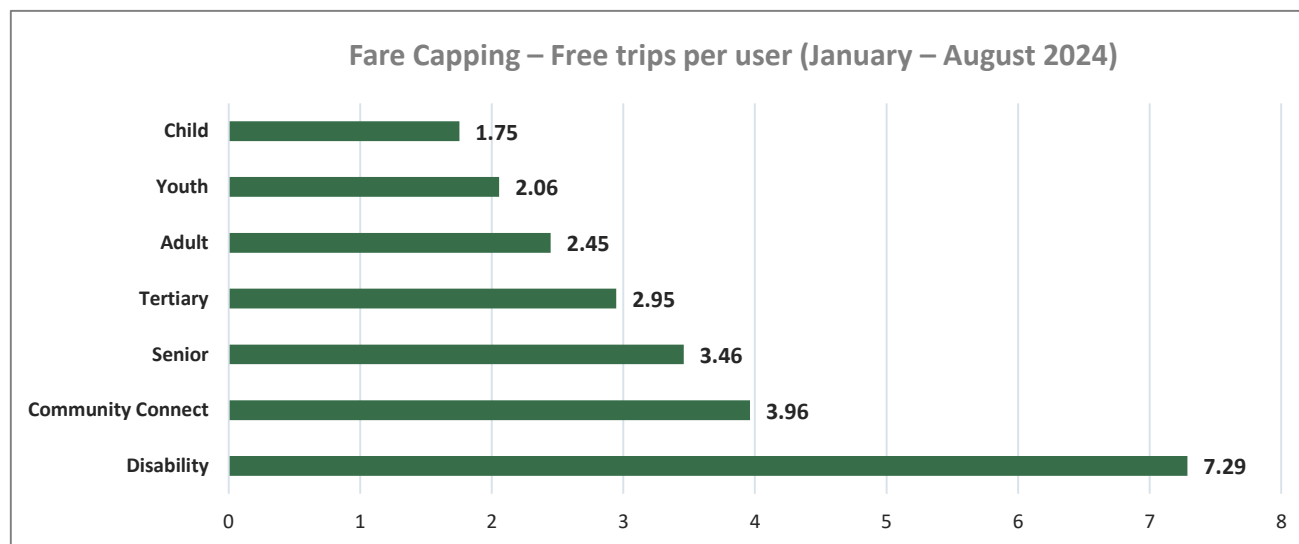


Figure 20: Free fare capping data – Trip per users based on concession type.

Total number of users utilising Free Fare Capping (FFC) threshold has fluctuated subject to the time of year, such as normal weeks vs school holiday / public holiday weeks.

In general based on recent data, there were 250-300 bus users which hit the fare cap each week. In some weeks, these users made more than 700 free trips. For example, the third week of August 2024 when 310 bus users reached the FC threshold and 775 free trips across the region were recorded.

Figure 20 shows FFC per bus users, based on concession type during January-August 2024. Among all concession types, Disability and Community Connect had the most usage in the FFC.



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