Otago Regional Council

regional public transport plan

OTAGO 2014

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Chairperson's foreword

Passenger transport services play a significant role in the movement of people within Otago.

The public transport networks in the Wakatipu Basin and Dunedin City provide an important travel option for people living in, or travelling around and through Otago. The services provided are a key element in the functionality of the two larger urban areas of Otago and enable the movement of large numbers of people safely, economically, and in an energy-effective way.

The Otago Regional Council (ORC) sets out in this plan, significant changes to public transport services in the Dunedin network. A new route structure with simple, direct routes without variation, coupled with regular frequencies will provide Dunedin residents and visitors with an improved public transport service. The concept of the development of a central city bus hub will assist in the coordination of bus services from a central city location, the provision of bus information and ticketing, and the ability to transfer buses with ease.

A new ticketing system will compliment the new network structure. This new system enables passengers to transfer between services on their journey without an additional cost for that zone, increasing the ability of people to access different parts of the city. A new fare zone structure will provide a more equitable journey cost.

The Draft Plan which initiated the public input to this document received a significant response. This input has been carefully assessed and has led to changes to the draft including routes, service frequencies and other enhancements. We are appreciative of the time and effort made by these submitters, and contributors, to this process.

This plan also sets out how ORC proposes to approach passenger transport services in wider Otago. It indicates the services we anticipate in the region provided by taxis, shuttles, private hire vehicles and buses. This includes the taxi-based Total Mobility Scheme through which ORC helps those who qualify through disability and are unable to use public transport.

This plan sets a new direction and partnering approach to public transport in the region and we look forward to its implementation.

Stephen Woodhead
Chairperson

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Executive Summary

This Otago Regional Public Transport Plan ('Plan') has been prepared by the Otago Regional Council (ORC) in collaboration with the following agencies:

- Dunedin City Council
- New Zealand Transport Agency
- Ritchies Coachlines
- GoBus
- Connectabus
- Queenstown Lakes District Council

It replaces the 2012 Regional Public Transport Plan, when it comes into effect on 23/12/2014

The Plan describes the public transport networks that ORC proposes for the region, identifies services that are integral to the networks over the next ten years, and sets out the policies that apply to those services.

The Plan presents a fundamental shift in our approach to public transport services. Listed below are the matters that change:

Region-wide

1. **Bus routes will generally use main roads not small residential streets, without variations to routes.**

   This means:

   (a) some passengers may have to walk further to access the bus
   (b) users can have certainty over the route the bus will travel

2. **Bus routes will be as direct as possible.**

   This means:

   (a) reduced travel times for many services
   (b) less 'touring' around the city

3. **The bus standards we adopt are consistent with the national standard set by the New Zealand Transport Agency.**

   This means:

   (a) The maximum age of a bus providing public transport services on Council contracts will increase from 15 to 19 years.

In Dunedin

4. **A new network of bus routes and frequencies that are stable and simple to remember will be introduced.**

   This means:

   (a) There will be changes to current bus routes for some users from 1 July 2015
   (b) Frequencies will become regular and some frequencies may change

5. **ORC will progressively withdraw from providing contracted school bus services. The new Dunedin bus network and ticketing system enables school pupils to access their school of choice without the need for separate school bus services provided by ORC.**

   This means:

   (a) school pupils will use the public transport network for their journey to and from school
   (b) some pupils may have a short walk from the bus stop to their school, and vice versa

6. **The northern services become part of the Dunedin network (Palmerston, Waikouaiti, Karitane, Evansdale and Waitati).**

7. **Wingatui is no longer part of the network.**

8. **Dunedin's seven-zone fare structure will change to a five-zone fare structure when the new ticketing system is introduced.**

   This means:

   (a) For some passengers fares will decrease, and for others, increase
   (b) A more simple structure enables people to have certainty in the fare they need to pay

These changes seek to provide public transport services that the public need and that will enable more people to use the buses more often.

1 Introduction

In this chapter

What is a Regional Public Transport Plan?

Why do we need it?

What does it cover?

How we developed the Plan

What is a Regional Public Transport Plan

The Regional Public Transport Plan ('Plan') sets out the priorities and needs for public transport services and infrastructure in Otago. It also enables ORC to seek money from Government to subsidise public transport services in Otago and to contract operators for those services.

The Plan details:

- public transport services available in the region
- policies that apply to those services
- information and infrastructure that supports those services.

The Plan encourages ORC, district/city councils (within the regional boundary), and bus operators, to work together to meet the needs of Otago passenger transport customers.

For public transport services in Otago, ORC expect:

- coordinated public transport services
- that good service reliability, frequency, coverage, and integration between services will encourage more users
- that the public transport market will enable operators to compete for services, increasing your confidence in services being priced appropriately
- to incentivise operators to increase patronage and reduce the reliance on government money for public transport services
- planning and procurement of public transport services to be transparent.

Why do we need it

Government legislation requires ORC to prepare, consult with the public, and adopt a plan of this nature. Without the Plan we are unable to tender for new or replacement public transport services.

With several Dunedin bus contracts expiring in June 2015 and June 2016, the Plan needs to be legally operative to enable the contracts to continue, or be replaced.

Section 117 of the Land Transport Management Act 2003, as amended (LTMA), defines the purpose of the Plan. The Plan is to provide:

(a) a means for encouraging regional councils and public transport operators to work together in developing public transport services and infrastructure; and
(b) an instrument for engaging with the public in the region on the design and operation of the public transport network; and
(c) a statement of:
    i. the public transport services that are integral to the public transport network; and
    ii. the policies and procedures that apply to those services; and
    iii. the information and infrastructure that support those services.

The LTMA also requires that we identify and give consideration to other matters including:

(a) detailing recent changes to each network
(b) explaining changes proposed for the next six to ten years for the public transport networks
(c) detailing the goal, objectives and policies for public transport services in Otago
(d) describing how we intend to implement those policies
(e) clarifying services for which ORC intends to provide financial support
(f) explaining how we will implement the public transport service components of the Strategy (soon to be merged with the Regional Land Transport Programme to form a Regional Land Transport Plan (RLTP))
(g) explaining how we will contribute in an efficient and effective manner, to achieve an affordable, integrated, safe, responsive and sustainable land transport system in Otago
(h) consulting with operators and taking account of their views.

What area of Otago does the Plan cover

Figure 1 shows the Otago area covered by the Plan.

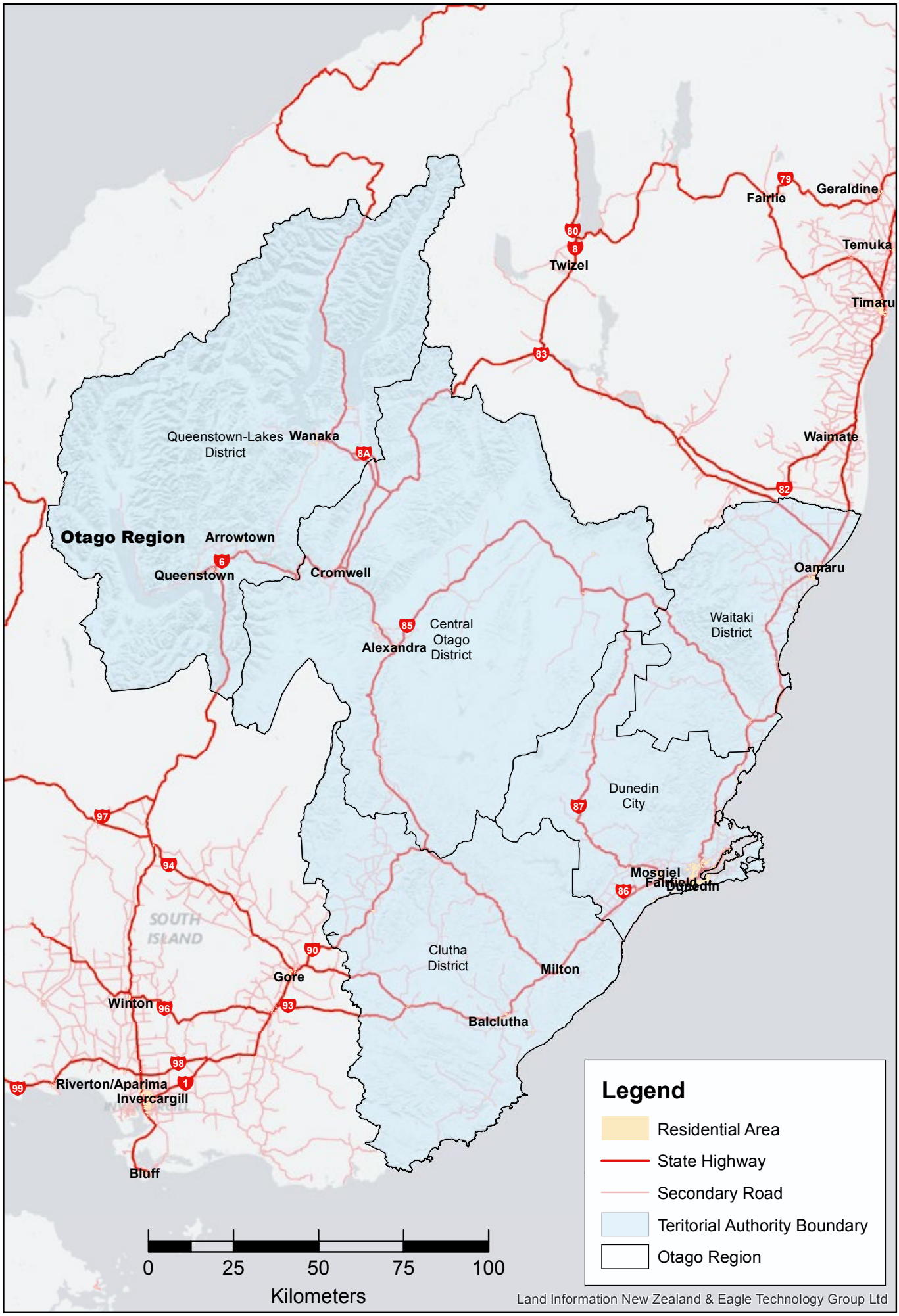


Figure 1 Area covered by the Otago Regional Public Transport Plan

What type of transport does the Plan cover

When we talk about public transport services, we are talking about:

- bus or rail services available to the public generally
- any other mode of transport (not air transport) available to the public generally
- taxi or shuttle services that ORC intends to provide financial assistance.

We are not talking about:

- shuttle services (to and from an airport, railway station or ferry terminal)
- a service contracted by the Ministry of Education for the transport of children to and from school
- a service to take passengers to or from a pre-determined event
- a service operated for tourism and not transporting people from place to place
- services that do not run to a schedule
- any public transport service in Otago that:
    - begins operating after this Plan is adopted
    - is not identified in the Plan as integral to the network
    - operates without a subsidy
    - is specified as Exempt by an Order in Council.

How we developed the Plan

This Plan is the outcome of five different work streams involving a collaborative effort from the following agencies:

- Otago Regional Council
- Dunedin City Council (DCC)
- New Zealand Transport Agency (NZTA)
- Ritchies Coachlines
- Go Bus
- Connectabus
- representatives from groups supporting the transport-disadvantaged.
- Through consultation with our community.

The five work streams consist of:

- a full review of the Dunedin bus network to optimise public bus services
- a full review of the fare structure and fare levels for the Dunedin public bus services
- the NZTA's Business Case approach process for proposed improvements to the Dunedin network
- workshop with representatives from groups representing the transport disadvantaged
- the development of *Units* (see glossary) for public transport services in Otago

Elements of these work streams provide key inputs for the Plan. The results from the network review are presented as the new direction for public transport in Dunedin (refer to **chapter 5** of the Plan). The options under investigation in the fare review, the fare structure and concession options, are also in **chapter 5**.

We held workshops with agencies representing people who may be transport-disadvantaged to help us to understand the issues those people currently face and how we can assist them in the future. Outcomes of these workshops are included in **Appendix 1**.

2 Strategic situation

In this chapter

The background to this Plan's preparation

The legal requirements

Key drivers for public transport direction

Overview public transport related national and regional matters

Opportunities for funding public transport in Otago

The background to the Plan's preparation

The foundation of the Plan is set on one main act of Parliament, the Land Transport Management Act 2003 (LTMA), as amended, and many planning documents that exist, both nationally and regionally. The Plan aligns itself with the Act and those documents and consequently the directions we are taking with public transport services nationally, regionally and locally.

Legal requirements

The Plan must contribute to the purpose of the LTMA. Therefore, it must contribute to an effective, efficient and safe land transport system in the public interest.

Part 5 of the LTMA contains the legal requirements for the regulation and management of public transport. Specific sections of Part 5 specify:

- what the Plan must contain (section 120)
- matters we must take into account when adopting a public transport plan (section 124)
- the minimum requirements for consultation with people and companies who operate public transport within Otago (section 125).

For more information on all of these requirements and how we meet them, please refer to **Appendix 2**.

Key drivers

People are the reason for travel. As a society, we move from place to place to access food, services, education, social interaction, recreation and employment. Travel choices we make influence where we live and our ability to access places or services.

Travel demand

According to the 2013 census data, the population in Otago has increased by 4.5% since 2006. The 4.5% increase is due to the following population changes in the local authority areas in the region, as shown in **Table 2.1**.

Table 2.1. Otago Population change by local authority area from 2006 - 2013.

Territory	Percentage growth	Relative number of people
Central Otago	7.5%	1,248
Clutha	>1%	51
Dunedin City	1.3%	1,566
Queenstown Lakes	22.9%	5,268
Waitaki	3.0%	606
Otago	4.5%	8,644

Source: www.stats.govt.nz 2013 Census Quick Stats

Population projections released by Statistics New Zealand do not indicate any significant deviations away from the current population trends. This means we can be relatively certain that growth rates throughout the region will remain similar to those of the past seven years.

In Central Otago and Queenstown, where significant growth is occurring, meeting the increasing demand for transport services and infrastructure are key factors in the urban planning of Queenstown, Wanaka and Alexandra. In Dunedin, a key focus is making the best of what we have and making value for money improvements to gain efficiencies on the current road and infrastructure network.

There are still uncertainties over future energy supplies and the rising cost of transport fuels. Social changes to demographics (an aging population) present further challenges in meeting the needs of Otago residents, including those with restricted mobility.

The ability of transport systems in Dunedin and the Wakatipu Basin to meet those changes will depend heavily on our ability to integrate public transport into the city environment, make the most of existing capacity and enable an increase in its share of travel demand. Public transport in Dunedin and the Wakatipu Basin needs to be attractive to users, both in terms of the convenience of the service offered and the relative cost and journey time for users compared to alternative forms of travel.

Public Transport Operating Model (PTOM)

As part of the LTMA, Government passed legislation introducing a PTOM as new structure for the future of public transport service planning and delivery. The model is a structure for building long-term working relationships among regional councils and public transport operators. The model drives joint planning and investment and seeks to have shared risk and reward for all parties. The model recognises that each party has a role in planning and providing public transport, and that they are reliant on each other to deliver services to the public successfully.

The model is encapsulated in section 115 of the LTMA. This Plan is designed to deliver on these five principles:

- regional councils, local councils and operators work together to deliver public transport services
- that good service reliability, frequency, coverage, and integration between services will encourage more users
- that operators will compete for services, increasing your confidence in services being priced appropriately
- that it is necessary to incentivise operators to reduce the reliance on government money for public transport services
- that planning and procurement of public transport services are transparent.

The model also requires us to provide and contract public transport services in units. Each unit is identified in this Plan and Council will contract each unit exclusively to an operator. A unit comprises all timetabled public transport services operating on a route or routes as identified in this Plan. You will find the proposed unit allocation for the Dunedin and Wakatipu Basin public transport networks in chapters 5 and 6 of this Plan. Policies applying to those units are in chapter 7.

Other strategic influences

As well as the changing population and fuel availability, we considered a number of national, regional and local strategies, plans and documents when preparing the Plan.

The policy implications of these other documents are summarised below in **Table 2.2**.

Table 2. Policy implications of other influencing documents

Document	Policy implications
Government Policy Statement on land transport funding	Highlights the Government's focus areas of economic growth and productivity, value for money and road safety. Focuses on the need for public transport to deliver value for money, provide access to economic opportunities, and provide better transport choices.
NZTA farebox recovery policy	Seeks to improve value for money by increasing the proportion of operating costs recovered from user fares. Requires the Plan to include a farebox recovery policy and targets.
Regional Land Transport Strategy Regional Land Transport Plan	Adopted in 2011 and currently under review, the Strategy focuses on having a transport system that provides connections between communities, leading to regional prosperity, the creation of wealth and employment, social inclusion and the minimisation of adverse environmental effects. With the recent amendment to the LTMA, the Strategy will no longer be required as a stand-alone document. We are required to prepare a Regional Land Transport Plan incorporating a strategic component. This Regional Land Transport Plan will not be in place until 1 July 2015, after the adoption of the Plan. The LTMA requires us to take the public transport components of the Strategy into account when preparing the Plan.
Otago Regional Council Long-term Plan	The long-term plan describes activities of the ORC as a whole, and enables the public to participate in the decisions made on those activities. Because the long-term plan details the level of public transport investment over the next ten years, it enables the community to be involved in the longer-term planning of public transport.
Local authority plans and strategies	Otago's district and city council transport strategies and plans all take into account the elements of the regional Strategy, so by default, the plan should be consistent with those local plans and strategies. To ensure good links with local direction, ORC works together with district and city councils when planning public transport services in their district or city boundary. Public transport contributes to and is a key component of achieving the outcomes sought in the Dunedin City Council Transportation Strategy.
New Zealand Energy-Efficiency and Conservation Strategy	The 'strategy' provides an action plan for energy efficiency and conservation, and the use of renewable sources of energy. It sets an objective of a more energy-efficient transport system, with a greater diversity of fuels and alternative energies.

Public transport funding

In preparing the Plan, we must take into account the availability of funding for public transport in the region. In Otago, we have two main sources of funding for public transport services:

- Co-investment from NZTA
- local contributions (rates and fare money)

Contributions from rates, and fare levels for contracted bus services are set out in the ORC annual plan and long term plan as part of funding for transport activities.

Available funding

The 2012-15 Regional Land Transport Programme includes an indicative allocation of $102 million (m) for public transport services and infrastructure for the ten years ending 30 June 2022, as set out in **Table 2.3**. This is funding that we sought from the National Land Transport Fund; it is not confirmation of the funding we obtained.

Table 2.3. 2012-15 Regional Land Transport Programme indicative funding allocation for public transport in Otago

Funding category	2014-15 (000's)	Total years 1-3 (000's) 2012-2014	Total years 4-10 (000's) 2015-2017	10-year total (000's) 2012-2021
Public transport services	8,411	24,495	76,941	101,436
Public transport infrastructure	132	419	241	660

Of the $25m sought in the first three years of the programme, we sought $13m from the NZTA (53% average) in accordance with their funding assistance rates. NZTA have recently reviewed their funding assistance rates and have advised the following rates will apply;

- 2015/16 = 52%
- 2016/17 onwards = 51%

The 2015-21 Regional Land Transport Plan (a plan that replaces and combines the Programme and the Strategy) is currently under development at the time of preparing the Plan. The Plan will be reviewed upon release of the Regional Land Transport Plan, we can update the funding availability at that time if necessary.

The NZTA seeks better value for money from the public transport services and infrastructure in which they invest. They seek growth in patronage and focus on reducing congestion and supporting economic growth and productivity. Although congestion is not a real issue in Dunedin or for the majority of

Otago, there are locations where congestion is significant. In particular, state Highway 6 and 6A near Frankton in Queenstown has notable congestion.

We expect that funds administered by the NZTA will remain at current levels, if not reduce in real terms, but QLDC may seek funding for public transport as an alternative to expensive roading improvements. The NZTA expects us to mange our public transport services within funding allocations and do not expect additional funding for cost escalations of adjustments for inflation. The *farebox recovery* policy, refer to **chapter 7**, ensures that users contribute a reasonable proportion of the cost of public transport services through the fares that they pay.

Because there are financial constraints on us, we need to focus on making changes to the public transport network so that we get better performance and value from our existing investments. In taking the first steps to achieve this, we have undertaken a review of the Dunedin public transport network. This review aims to outline where we can make improvements to our network to provide a better service with the money we have available to invest, and the infrastructure that we already have. You can find out more about the network review in **chapter 5**. It is likely that a review of the Queenstown network will occur in 2016 as a result of the business case process for the Queenstown Lakes Transport Strategy review.

Another way we are getting smarter with the money available and the needs for public service, is to be more efficient with the procurement of services.

3 Your current public transport

In this chapter

Current public transport services

Public transport services with which ORC will be involved

Total Mobility

Exempt passenger services

Options for the transport disadvantaged

Recent investments and changes in the networks

Challenges for public transport

Public transport services in Otago

The plan concerns public transport in Otago. We consider public transport as follows:

- scheduled bus or passenger rail
- shuttle services
- taxi services
- private hire services
- other types of service operating on demand (whether with a bus, van or vessel)
- community-based schemes and informal arrangements
- emergency and medical-related transport services.

We assessed the need for different types of public passenger transport services, including the needs of people who are transport disadvantaged, and determined a range of services to meet those needs within the funding we have available.

The LTMA defines transport disadvantaged people as 'people who the regional council has reasonable grounds to believe are the least able to travel to basic community activities and services (for example, work, education, health care, welfare and shopping)'. **Appendix 2** details the publicly funded transport available to assist those who are transport disadvantaged.

Rather than trying to tailor public transport services to specific locations or groups of people, the Plan enables public transport on main road corridors and state highways throughout the region.

Policy 1

Public passenger services that should be provided in Otago (not necessarily with public subsidy) are:

(a) two integrated urban public transport networks, one in Dunedin and one in Wakatipu Basin, delivered by:
  i. scheduled bus services
  ii. taxi and shuttle services, including taxi vans or shuttles with wheelchair hoists.

(b) between centres within Otago and beyond, provided by bus.

(c) school bus services (separate from public buses in the integrated networks, used by school children) provided by Ministry of Education as an *Excluded* service, or by a bus operator and registered as an *Exempt* service

(d) taxis, shuttles and private hire services in those areas where providers choose to operate

(e) bus and rail services for excursions and special events

(f) community-based schemes and informal arrangements, where people choose to operate them

(g) emergency and medical-related transport services.

Public transport services with which ORC are involved

We are involved with urban public transport services and the Total Mobility Scheme. **Appendix 3** lists the responsibilities for the different agencies.

Public transport policies

These policies apply to ORC decisions about which urban public transport to contract and/or subsidise in Otago

We will implement these policies through:

- management and operation of the two integrated networks
- contracting any new bus services outside two integrated networks (to be considered on a case-by-case basis, as part of future decision making).

Policy 2

Our preference is to grow patronage of public transport services in Otago with less reliance on subsidy, while recognising:

(a) the desirability of public transport networks to meet that community's travel needs

(b) the appropriateness of ratepayers helping to fund public transport in an integrated network because that public transport benefits the community as a whole

(c) that increased investment in public transport should result in improved value for money over the wider public transport network.

(d) that price is an important component to making public transport choices.

Policy 3

ORC plans and manages public transport in each of the areas shown in **Figures 2 and 3** as integrated public transport systems or networks in order to meet community needs and grow patronage, while, at the same time, incentivising commercial behaviour in order to reduce the impact on public investment over the long term:

(a) Dunedin metropolitan area, including Port Chalmers, Otago Peninsula, Brighton, Mosgiel, Waitati, Karitane, Waikouaiti and Palmerston
(b) Wakatipu Basin, including Fernhill, Sunshine Bay, Arthurs Point, Frankton, Lake Hayes Estate, Shotover Country, Arrowtown, Kelvin Peninsula and Frankton Arm.

Figures 2 and 3 show the outer boundaries of these two networks.

Policy 4

To ensure viability of public transport, ORC, when deciding whether to contract and apply public subsidy to any public transport service, applies the following criteria:

(a) Within an integrated network, the entire network rather than any individual service must remain viable.
(b) Outside an integrated network to enable the service to operate viably, the community must support the provision of the service and ensure that there are sufficient users to cover a sufficient share of the operating costs through fares.

A viable network or service meets the following criteria:

(a) It is affordable to provide, taking into account:
    i. user demand
    ii. the need to provide ancillary infrastructure and information for users
    iii. any subsidy provided to assist the transport disadvantaged
(b) ratepayer and National Land Transport Fund cost contribution
(c) value for money.

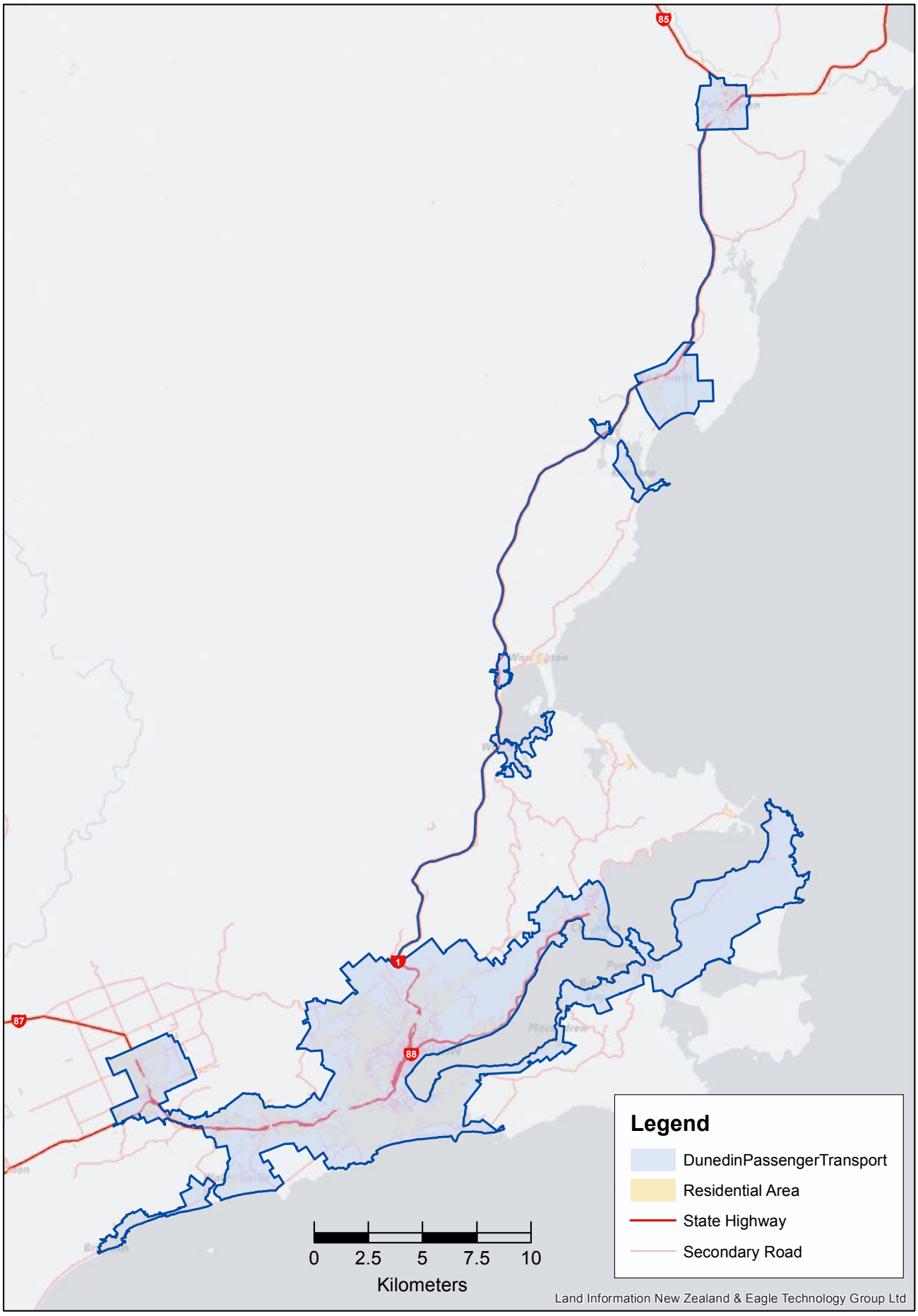


Figure 2. The outer boundaries of the Dunedin integrated public transport network

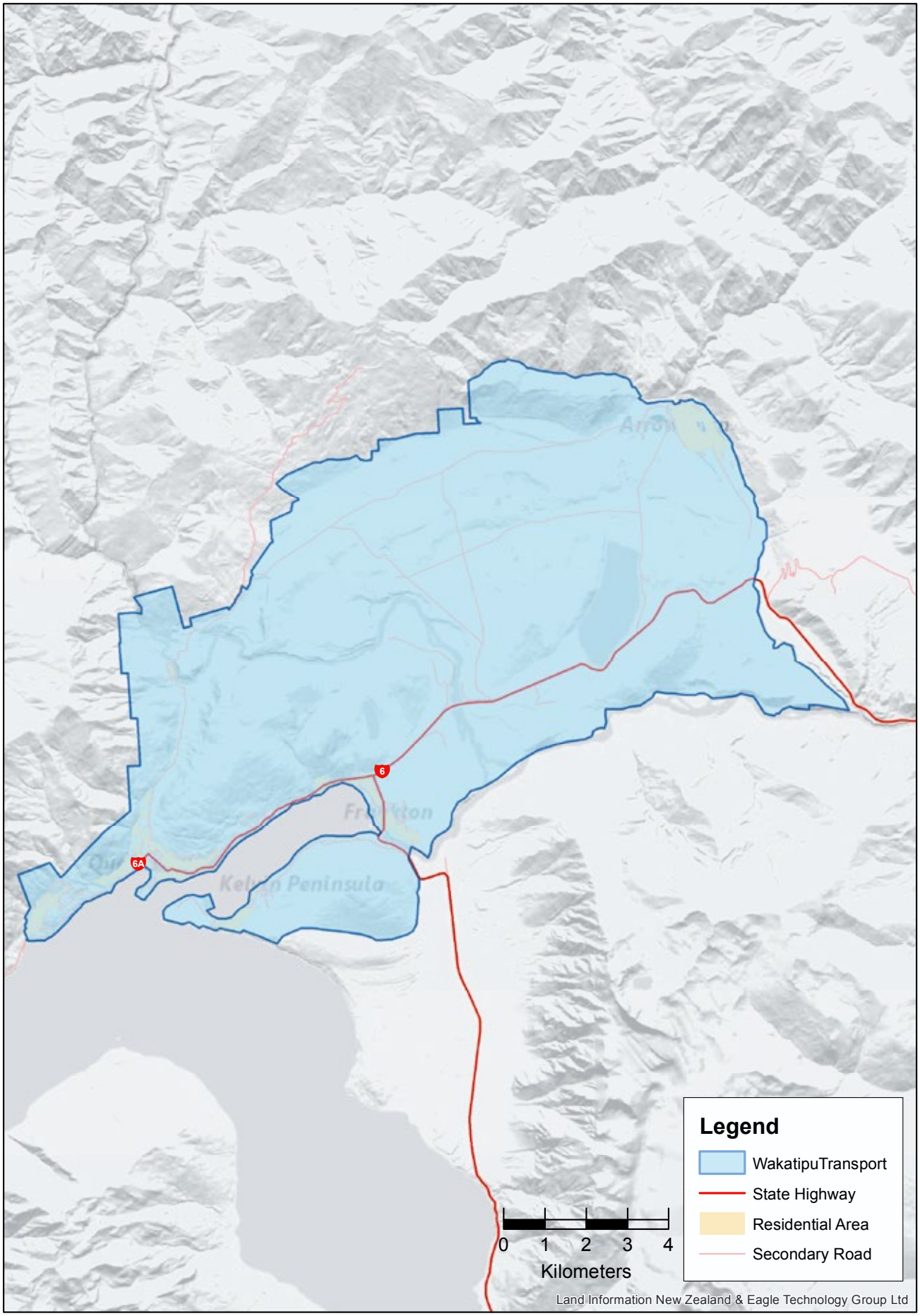


Figure 3. The outer boundaries of the Wakatipu Basin integrated public transport network

Total mobility

We administer the Total Mobility Scheme for those eligible and who have difficulty using scheduled public transport services. Total Mobility is a national scheme; in Otago, it operates in Dunedin, Oamaru, Queenstown, Wanaka, Alexandra and Balclutha.

The Total Mobility scheme assists eligible people with impairments to access appropriate transport to enhance their community participation. The assistance is provided in the form of a subsidy for approved door to door transport services.

These policies apply to those areas of Otago where the scheme currently operates, as well as any areas in which a taxi/shuttle might become registered and agreement made with ORC to participate in the scheme

We will implement these policies through:

- administration of the Total Mobility Scheme, delivered with the assistance of agencies with eligible clients (i.e. business as usual). ORC's provisions (rules) for the scheme's operation, below, are consistent with national rules for the scheme.
- ORC giving consideration to replacing paper vouchers with an electronic ticketing/card system (investigation funded, implementation not yet funded) once NZTA has developed a suitable national system. (NZTA work on the latter is underway.)
- in the case of provisions concerning the standard of taxi vehicles, they will be self-monitored by taxi companies participating in the Total Mobility Scheme

Policy 5

ORC provides funding assistance within budget constraints to those with disabilities who are unable to use scheduled services, to enable them to use taxi or shuttle services where these operate. The subsidy for scheme users is 50% of the full fare, up to a specified maximum subsidy, funded from local rates and NZTA grant, the proportions to be determined by government policy.

Policy 6.1

ORC funds wheelchair accessible taxi-vans within budget constraints, through a grant for installation of a hoist and reimbursement to wheelchair-hoist van operators of a specified flat fare per passenger.

Policy 6.2

Applications from new scheme providers will be considered with regard to community need and sustainability.

Policy 7

ORC works with *Total Mobility* users, disability agencies and taxi organisations to implement:

(a) any upgrades to the national scheme that might result from new national standards
(b) any customer service standards that taxi companies are required to implement in order to provide *Total Mobility* services
(c) an expanded fleet of wheelchair-accessible vehicles operating throughout Otago.

In 2014, the maximum fare subsidy (Policy 5) is $25 (including GST), and the flat fare for wheelchair-hoist trips (Policy 6) is $10 per passenger (GST exclusive).

Further information on the scheme is available for users or providers from ORC.

Policy on 'exempt' passenger transport services

The following policies apply to:

- Scheduled passenger transport services in Otago operating as commercially registered services or deemed exempt services

ORC will implement these policies through:

- maintaining a register and processing applications for registration of 'exempt' services (business as usual)
- the provisions A and B Table 3.1 concerning information that passenger transport operators must supply in applications for 'exempt' services; for new registrations and variations to existing registrations.

Before the 2013 amendments to the LTMA, anyone operating a commercial passenger transport service carrying passengers for hire or reward within the Otago region was required to register the service with ORC. (The registrations could be declined under section 31 of the now-revoked Public Transport Management Act 2008.)

Under the new legislation, commercial passenger transport services no longer exist. Those services are now deemed to be 'exempt' services in accordance with sections 130-139 of the LTMA and the transitional provisions of section 151 – 159 of the LTMA.

All existing registered scheduled commercial bus services which are part of an intergrated public transport network can continue to operate without contract to the ORC as if they are an exempt service, until ORC specifies a date in a notice to an operator. We anticipate that all operators on the ORC commercial passenger transport services register (as at 1 July 2014) will be able to operate their registered commercial services as if they are exempt services as follows:

Dunedin Network no later than 1 July 2016.

Wakatipu Network no later than 1 January 2018.

Sections 131 – 139 of the LTMA apply to new exempt services notifications, for these ORC:

- may decline an exempt service registration
- can deregister exempt services
- will maintain a register of exempt services

Operators of exempt services may also withdraw their service from the register in accordance with section 139 of the LTMA.

There are some existing commercial bus services (services deemed to be exempt) that we classify as integral to the integrated public transport networks. These services are:

Dunedin

- St Clair - Normanby weekdays and Saturdays
- St Kilda, Brockville and Halfway Bush, weekday

(We expect these services to stop operating (section 154(3) of the LTMA), on or before 30 June 2016. By 1 July 2016, those services will be part of a Unit for public transport services and contracted to ORC.)

Wakatipu

- Sunshine Bay, Fernhill, Queenstown, Frankton, and Arrowtown services.

(We expect these services to stop operating (section 154(3) of the LTMA), no later than 31 December 2017. By 1 January 2018, those services will be part of a Unit/s for public transport services and contracted to ORC.)

Section 134 of the LTMA specifies the grounds on which ORC may decline to register or vary an exempt service. There are three key reasons why we may decline a registration and these form the basis of our policies on exempt services.

Policy 8

Identify specific exempt services that are not subject to PTOM contracts or unit policies:

(a) Provide for the following exempt services to operate within the Otago region without PTOM contracts:
   i. inter-regional services that operate without any subsidy from ORC
   ii. school bus services (not contracted to the Ministry of Education or ORC) that were operating on or before 1 July 2013 and registered as an exempt service before 1 July 2015

Policy 9

Ensure that the operation of any exempt service does not adversely affect the wider public transport network. ORC may decline any application for, or variation to, an exempt service if:

- that service is likely to adversely affect the financial viability of any Unit; or
- that service is likely to increase costs to ORC of operating any Unit; or
- it is contrary to any sound traffic management.

Policy 10

Notice periods for registration, variation or withdrawal of exempt services are those specified in the LTMA.

Table 3.1. Provision concerning applications to operate exempt public transport services

A	For the purposes of considering whether traffic management is sound, Table 3.2 shows those locations which road controlling authorities permit exempt or deemed exempt Passenger transport services for use as a bus or train terminus or as a transport station.
B	Applicants to ORC proposing to continue or commence operating an exempt Passenger transport service, or vary a registered service, will give written notice of the details of that proposed service, which must include: (a) the information required in section 133 of the LTMA Act 2013; and (b) the minimum standard of vehicle used to operate the service, including engine type and maximum age.

Table 3.2: Areas approved by Otago road controlling authorities for use as bus termini

District	Road locations able to be used as bus termini (as determined by the road controlling authority)
Central Otago district	**Alexandra:** at the marked bus stops located on SH 8 Centennial Avenue, adjacent to and opposite the Alexandra Museum **Cromwell:** at the marked bus stops located on Lode Lane, adjacent to public toilets **Roxburgh:** at marked bus stops located on SH 8 Scotland Street, between Kelso and Hawick streets
Clutha district	**Balclutha:** Charles St, east side from 9m to 24m intersection with Town Hall Street **Lawrence:** Ross Place/SH 8, west side, 40m to 55m from intersection with Irvine/Whitehaven streets; east side, 51m to 70m from intersection with Irvine/ Whitehaven streets
Dunedin city	Short-term drop off for inter-city coaches in upper Stuart Street. Longer- term coach parking on SH1 South (High Street), between Dunedin Railway Station and Toitu Otago Settlers Museum
Queenstown Lakes district	Frankton bus terminus

District	Road locations able to be used as bus termini (as determined by the road controlling authority)
Waitaki district	**Oamaru:** Eden Street, between LJ Hooker and Lagonda Tearooms **Palmerston:** Bond Street, behind the Waihemo Pharmacy and over the road from the old railway station **Omarama:** SH 83, outside Merino Country Café (not marked)

What are the current types of public transport in Otago

The current public transport system in Otago comprises two integrated public transport networks in the metropolitan areas of Dunedin and the Wakatipu Basin. There is currently a service extending to the north of Dunedin servicing Waitati, Evansdale, Karitane, Waikouaiti and Palmerston, linked to the Dunedin integrated public transport network. This will be merged into the Dunedin network during transition to the PTOM. Services we provide are by bus and small passenger vehicles/shuttles for Total Mobility services. Service levels vary by route, day of the week and time of day, in response to the different use patterns and demand.

The current public transport network services in Dunedin, Northern services, and the Wakatipu Basin are described in **Appendix 4** and shown in **Figures 4**, **5** and **6**. The Dunedin network consists of bus services using state highways, main arterial roads and small residential streets. Frequencies of services are currently irregular on many routes with a predominance of low frequencies on services to the more distant suburbs of Portobello, Harington Point, Port Chalmers, Mosgiel and Brighton. Routes in the network operate in a radial pattern to the central city and there are seven main central city bus stops acting as termini for different routes. The northern service operates on its own irregular frequency and has its own fare structure.

In the Wakatipu Basin, there is a main spine route between Fernhill, Queenstown town centre and Frankton, the airport and Remarkables Park. Services to other areas of the Basin connect to the Queenstown or Frankton ends of this spine.

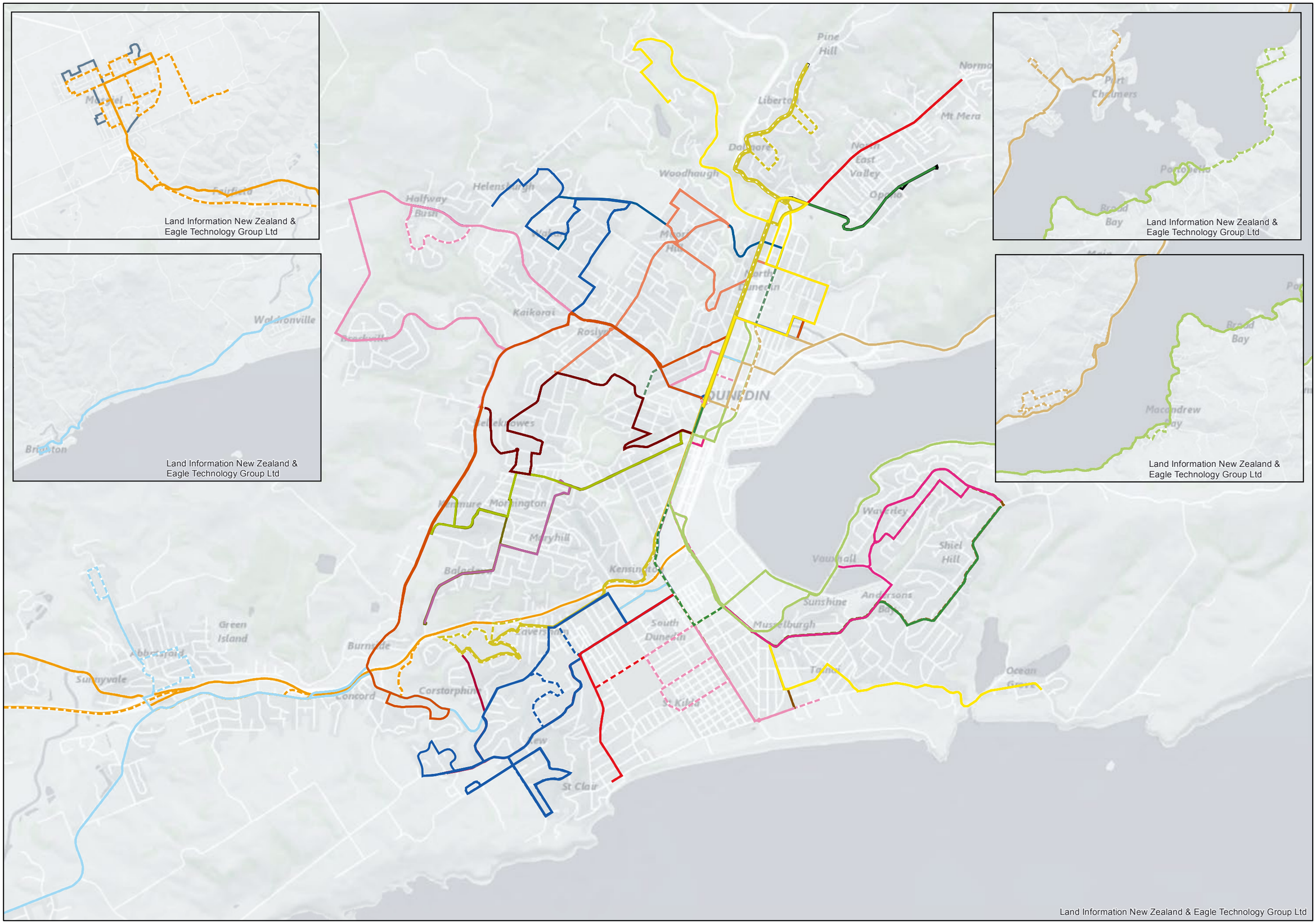


Figure 4 The current Dunedin bus network

Figure 5. The current Northern services extending from Dunedin to Palmerston

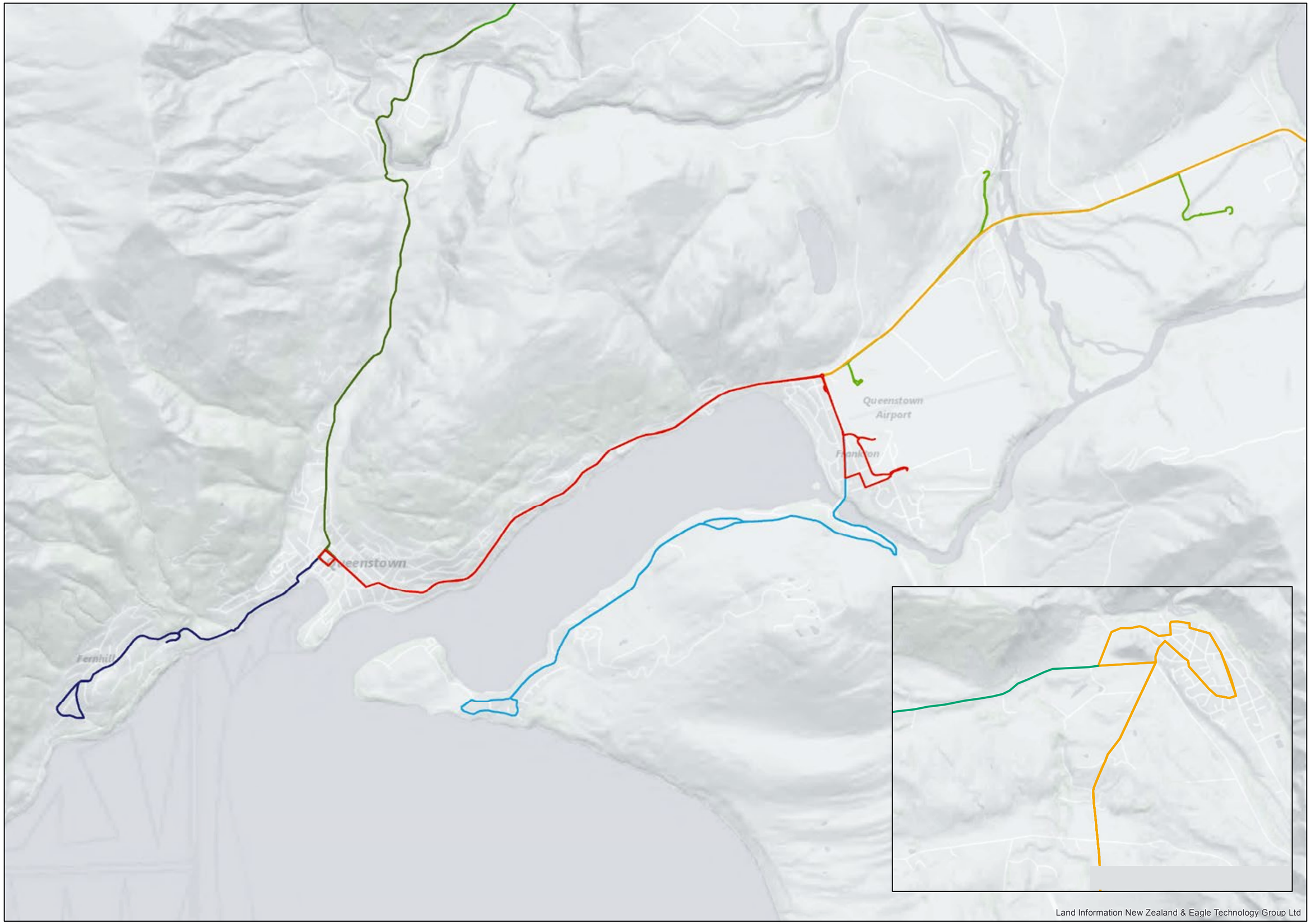


Figure 6. The current Wakatipu Basin services

What recent investments and changes have we made

Recent years have seen a number of changes to Dunedin and Queenstown public transport services. For each network, these changes focused on:

Wakatipu Basin

- subsidised bus services, which are now fully commercial
- implementing a new bus service to Arrowtown via Arthurs Point and Malaghans Road
- urban bus timetables, which are now on a smart-phone friendly website
- promotion of the 7-day bus pass

Dunedin

- improving the coverage of services
- removing poorly patronised services to enable more services where demand is high
- regularising timetables
- implementing a Journey Planner
- a student discount
- in excess of 100 bus shelters installed

Future investments and changes

We do have many other projects under development and we detail many of these later in the Plan. At present in the Wakatipu Basin we are:

- implementing a new ticketing system to support the fare structure and online top-ups of GoCards
- exploring real time availability and mobile phone technologies
- exploring additional services to Shotover Country and the potential for services to Jacks Point in the future.
- Planning a review of the Wakatipu network.

In Dunedin, we are:

- developing a new network to attain stable routes on main roads, not small residential streets
- simplifying the route numbering
- simplifying the timetables and making frequencies regular
- simplifying the timetable booklet and presentation of information
- coordinating timetables in the central city to enable more efficient transfers in the future (supported by a within zone free transfer system)
- adding bus shelters
- progressively increasing the number of timetables at bus stops around the city
- simplifying the current fare zone structure and fare system and exploring options for concessions or fare products (e.g. free transfers (within zone), daily caps, weekly passes etc)

- implementing a new ticketing system to support the simplified fare structure and online top-ups of GoCards
- exploring real time availability and mobile phone technologies
- increasing the accessibility of information for those with visual impairments
- exploring the need and demand for a central city bus hub to enable access to the wider city without additional travel cost (free transfer) and to create a centralised location for information and GoCard top-ups as well as facilities for bus driver rest breaks.

In Otago, over the past three years, there has been a mixed response to patronage in our two public transport networks. The Wakatipu Basin has seen a significant growth in patronage, but no increase in mode share in peak times on arterial roads, whereas in Dunedin, patronage growth has been minimal; this difference reflects the significant population growth patterns between the two areas as well as complex timtables and route structures. Total patronage on public transport services in the Otago region are currently static and have been since 2011.

What challenges do we face

Wakatipu Basin

A significant problem in the Wakatipu Basin is traffic congestion on state highways 6 and 6A near Frankton and in the Queenstown town centre. Previously congestion was an issue only at the peak commuter-travel time (6-9 am and 3-6 pm, in the peak tourist season). Public transport has a role in managing congestion and deferring the need for some expensive road building projects by carrying passengers that would otherwise be in private vehicles.

Resident population and tourism growth in Queenstown and the Wakatipu Basin continue to drive congestion levels near Frankton. With a 15-minute frequency, between Queenstown and Frankton, increasing the frequency of the bus service will not solve the congestion issue. The congestion significantly delays bus travel causing buses to be late on many occasions. The nature of the network (in that most bus routes include Frankton Rd) means that congestion on Frankton Rd may translate to unreliable bus services across the urban network.

A concerted effort is required by the road controlling authorities, the ORC and the bus operators to increase public transport's 'market share' in the Wakatipu Basin.

Dunedin

Despite recent changes to services, there are many shortcomings of the Dunedin public transport network. The existing network is extremely complex with over 140 different route variations operating at different times of the day, depending on the day of the week. Many routes in the city meander through suburbs and as a result have longer than needed travel times. There is not only customer confusion about services and timetables, but also about who has

responsibility for what public transport services and infrastructure (ORC or DCC).

When compared to car travel, public transport journeys in Dunedin are slow because of the indirect nature of the routes. Public transport services will always be slower than taking a private motor vehicle because buses need to stop frequently to enable passengers to get on and off. However, this difference can be minimised by having more direct routes to the places people want to go.

Looking to the future, Dunedin will continue to have challenges for public transport. The major challenges, and our proposed responses are outlined in **Table 3.3** below.

Table 3.3. Major challenges facing Dunedin public transport

Challenge	Current situation	Proposed response
Mode shift	Dunedin currently has low patronage growth on public transport. Significant barriers to travel exist because of complexities in the network, lack of integration with other transport modes and costs to use services. Car parking supply and pricing and dominant car culture for short and long trips.	The new network structure aims for a simple consistent network with better frequencies and routes. It will enable people to rely on bus services and improve the ability of people to be able to understand how they can use the bus, and to work out where it will take them. Improved fares and transfers will enable people to use the bus more.
Integration with land use planning	Poor integration and consideration of public transport services with land use creates barriers to public transport use.	Integrating land use planning with the new network will enable the DCC to achieve a compact city with good transport networks for all modes of travel..
Meeting diverse travel demand	Dunedin's travel patterns are diverse, many origins to many destinations. The current network struggles to provide services to meet the desired demand for travel.	The new network will allow greater ease of transferring buses, thereby creating a network that enables diverse travel patterns without the need to travel to the city centre and then back out to the suburbs.
Funding constraints	Funding for public transport becomes more constrained with the Government striving for value for money and the increasing expenditure in Auckland, Wellington and Christchurch.	We need to make effective use of the funding available to grow patronage. More efficient procurement and a simplified bus network will also improve the value for money of the network.

Challenge	Current situation	Proposed response
Farebox recovery	The national farebox recovery target is an aggregated 50%. The Dunedin ratio is currently 51%. ORC want to maintain this level of farebox recovery to ensure equity between the users and public funding.	Better use of our resources in the new network, and its simplified structure should assist patronage growth and enable us to obtain our current farebox recovery levels over the long term, while accepting a drop in farebox recovery during the term of increased investment may occur.
Uncompetitive travel times	For most public transport journeys, travel is far slower than private motor vehicle travel, due to stop-start travel and a network of meandering routes and low travel frequencies.	The new network proposes more direct services on better frequencies as well as better ticketing options. These will all work to reduce boarding times, and the travel time to and from the city.
Improving energy efficiency	Public transport offers the potential for more energy-efficient travel by carrying more people in fewer vehicles.	The Plan proposes a network that will supply better frequencies with the existing level of resources thereby enabling more users to travel by bus and reduce the volume of fuel used for regular travel.
Social perception	Members of the general public sometimes have a negative perception of public transport in Dunedin.	The Plan will allow Dunedin residents not only to develop a favourable and supportive network of public transport services but it will also show them that they have a valuable bus service of which they can be proud.
Governance	Governance of public transport in Dunedin currently rests with ORC.	

What options are there for those who are transport disadvantaged

An important focus of the Plan is to work towards meeting the needs of those who are least able to travel to basic community activities and services (including employment and study) – the transport-disadvantaged.

Appendix 1 summarises a collaborative assessment of the accessibility needs of the transport-disadvantaged in the Otago region.

Providing a comprehensive bus network with regular frequencies and easy to remember timetables and routes will go some way to meeting their needs. However, we recognise that some groups have specific needs that may be met more effectively by other means. Subject to continued funding availability, ORC will continue to support specific services such as Total Mobility services for people with disabilities.

ORC will continue to work with disability groups to ensure that the principles outlined in the Human Rights Commission report 'The Accessible Journey' - are reflected as much as we can in the development of public transport services and infrastructure.

Appendix 1 also outlines the forms of publicly funded assistance available to transport-disadvantaged people in Otago to help them meet their travel needs.

4 Public transport's journey ahead

In this chapter

What we want to achieve with public transport in Otago

The objectives and outcomes we seek

The targets and measures we can use to check our progress

What we want to achieve

The Regional Land Transport Strategy 2011 set out the goal and objectives for all passenger transport in Otago. These are currently under review. This Plan will be updated once the Regional Land Transport Plan 2015-18 has been adopted.

Goal

Viable passenger transport meeting the needs of Otago's communities.

Objectives

Passenger transport that:

- supports community wellbeing through mobility, building social integration and participation, and assisting economic development
- provides an alternative to car travel in urban areas and along key corridors to benefit as a whole the communities in which those services operate
- offers those in urban areas personal choice in travel mode, assisting the transport disadvantaged and people with disabilities and catering to those studying/working on the tertiary campuses
- helps to ensure community resilience when external events (such as a rapid rise in the price of oil or a shortage of fuel) disrupt normal travel patterns
- serves (through its existence) to encourage intensive residential development in areas where growth can be adequately supported, by providing opportunity for people to be less car-dependant if they choose
- provide fully accessible public transport in urban areas and along key corridors
- ensures that space is available for public transport
- ensures that idling of buses does not pose unnecessary health risks to the community
- realistic levels and quality of service
- public transport users are willing to pay an adequate proportion of costs needed to operate services viably.

Measures and targets

Working with CODC, CDC, DCC, QLDC, WDC, the NZTA, and the public of Otago, ORC has developed measures to help assess our progress in achieving these objectives for passenger transport services. **Table 4.1** below outlines the key measures for each relevant objective and identifies our current performance and the target we aim to achieve by 2030.

There are other measures used for monitoring the performance of passenger transport services as well. **Chapter 7** sets out the monitoring policies for contracted public transport services in Otago.

Table 4.1. Key objectives and their measures.

Objective	Measure	Current performance	Future target
Supports well-being	Basic level of service linking all communities on arterial roads with shopping, medical and recreational facilities	Acceptable	Acceptable
Provides an alternative to car travel	Steady increase in the number of trips being made on public transport region-wide	Poor	Acceptable
Offers choice in travel mode (in urban areas)	Steady increase in the number of trips being made on public transport in Dunedin and the Wakatipu Basin	Acceptable	Acceptable
Ensures community resilience	Monitor public transport patronage levels region-wide	Acceptable	Acceptable
Encourages residential development	New subdivisions are located and designed to ensure quality walking access to public transport	Poor	Acceptable
Fully accessible public transport	Proportion of super low floor vehicles in the public transport networks	Acceptable	Excellent
Space is available for public transport	District and city councils monitor the standards in subdivisions and developments	Poor	Excellent
Idling of buses does not affect public health	Air quality in the main streets of Dunedin and Queenstown where buses idle is within acceptable limits for health	Acceptable	Acceptable
Realistic levels and quality of service	Service levels are defined and well publicised	Acceptable	Excellent
Users are willing to pay	Farebox recovery is between 46% - 51%	Achieved	Achieved

5 A new network structure for Dunedin public transport

In this chapter

The objectives of the new Dunedin network

The principles upon which the new network will be based

New network design

Services integral to the network

Fare structure options

The business case approach

Objective of the new network structure in Dunedin public transport

The objective of improving the Dunedin public network is to create an affordable network that:

- grows patronage with less reliance on public investment by meeting customer needs;
- is simple to understand, and easy to use and communicate;
- gets people generally where they want to go, when they want to go, comfortably, conveniently, and safely;
- is based on a design that recognises that people walk or cycle to/from bus stops;
- is based on a design that makes best use of limited resources and the network's small size.

The principles for the new network structure

The following principles for bus routes, frequencies and fares for Dunedin will seek to:

- eliminate or minimise the variations to routes in the network,
- coordinate timetables at a point in the central city, to enable people to transfer between services there and at other locations in the city
- implement a simpler route structure, through-route services on which passengers are likely to want travel through the central hub by matching frequencies to avoid any need for buses to wait up in the central city
- use fare structure and fare products to encourage patronage and revenue growth by designing them to appeal to those market segments with the most potential for growth in the next few years.
- Support community well being through mobility, accessibility, building social integration and participation, and assisting economic development.

Network design principles

- routes that are as direct as possible, without unnecessary impedance, deviation or variation
- clockface schedules at a central city bus hub; regular headways/frequencies
- schedules that provide for relatively easy transfers where routes cross or join but without these timetables needing to be finely coordinated at any super stops outside the central city
- bus stops that are easy-to-see for both customers and bus drivers
- a small number of transfer points in the network, with most transfers happening at a central city bus hub
- in the area surrounding the central hub, bus routes use common corridors, in order to minimise modal points of conflict.

Patronage principles

- the network design recognises our client base and ensures a good match between:
    - the route, number and timing of services to the demand for travel;
    - operating hours and the desire to travel (subject to minimum loadings)
    - bus capacity and demand
- stable route structure (so changes over time are minimal) and stopping pattern so people know the key points at which buses stop on each route
- routes designed to provide acceptable travel time compared to other common travel modes
- the majority of services concentrated on localities likely to generate the bulk of the demand (meaning most network patronage is generated from core high frequency routes)
- the ability to increase capacity on a route when needed.

Access and mobility principles

- bus stops within walking distance for bus users
- safe walking access to/from bus stops, particularly for stops with greatest demand
- people walk further to take a higher frequency service
- optimal spacing of bus stops so the times a bus stops and walking times to/from stops are acceptable to the majority of users.

Efficiency principles

- for high frequency routes, mass transit corridors recognised by the road controlling authority, with priority for public transport use and no physical constraints to this potential
- measures and designs that give buses advantages over cars on high frequency routes and in busy traffic situations
- priority allocation to buses for key space, particularly for a central city bus hub
- different peak and off-peak frequencies, if needed, to match capacity and demand
- scheduling that makes good use of the bus fleet
- scheduling that avoids, as far as possible, clumping of buses in common corridors, and on roads busy with other traffic
- a good match between the size of bus, the topography of the area and demand for service, recognising the advantages of a homogenous fleet
- for outlying areas, transport planning considers all travel options, and bus services are used only if the stability of the network bus routes is not compromised and when average service loading and network farebox recovery are sufficient to ensure service viability.

Structure of the proposed new public transport network

ORC propose an improved approach to providing public transport in Dunedin, based on a simplified route and timetable structure. The proposed new Dunedin integrated public transport network comprises a combination of **Rapid**, **Frequent** and **Regular** services providing key connections across and to the city.

The Rapid services will cover locations such as the Central City, public hospital, tertiary precinct, South Dunedin, Gardens and the Stadium. We will support this rapid network with the frequent and regular networks; both will have good frequencies during weekdays and go to the places where people live and need to access. **Figure 7** shows the proposed new network structure.

The network structure is a radial pattern with services going to the central city and in some instances going on to another suburb. This means that most routes will be paired so that you can ride from one end of a route, through the central city, and out to another suburb. We intend to support this network with a free bus transfer for the zone in which passengers disembark. This will enable passengers to change bus to finish their journey without an additional penalty resulting from a change of service.

We present the maps of the bus route for the Rapid, Frequent and Regular networks in **figures 8, 9 and 10**. We anticipate a staged rollout of the new network structure to commence from 1 July 2015 with the majority of new routes in place by 1 July 2016. We also present the proposed orbital service, the Ridge Rider connecting the suburban centres of South Dunedin, Mornington, Roslyn, Maori Hill, Gardens and the University, but we still have more investigations to undertake before a commencement date for this service is determined.

A key element of the network is the stability of routes. The new network will use main roads and avoid using small residential streets, except where they form a safe route to turn the bus at the outer end of a journey, or in dense housing areas of St Kilda. The routes will be stable all day, night and weekend. There will be no variations to routes at any time to ensure that passengers know and can rely on their route of travel.

The new network will provide stable weekday daytime frequencies from 7am until 7pm with less frequent services in the evening and weekend, depending on demand. Achieving the desired frequencies will ultimately depend on levels of patronage and may need to be established fully once patronage is strong enough to support the level of service needed to sustain those higher frequencies and maintain the viability of the services.

The Rapid, Frequent and Regular routes may need support from specialised services in areas where there are a significant number of residents who are physically transport disadvantaged, particularly those with physical, sensory or cognitive impairments.

A key issue in our current network is the variety of termini in the central city. We currently have seven key bus stops in the central city and historically timetables were not coordinated at any particular location. This has meant passengers find changing bus difficult.

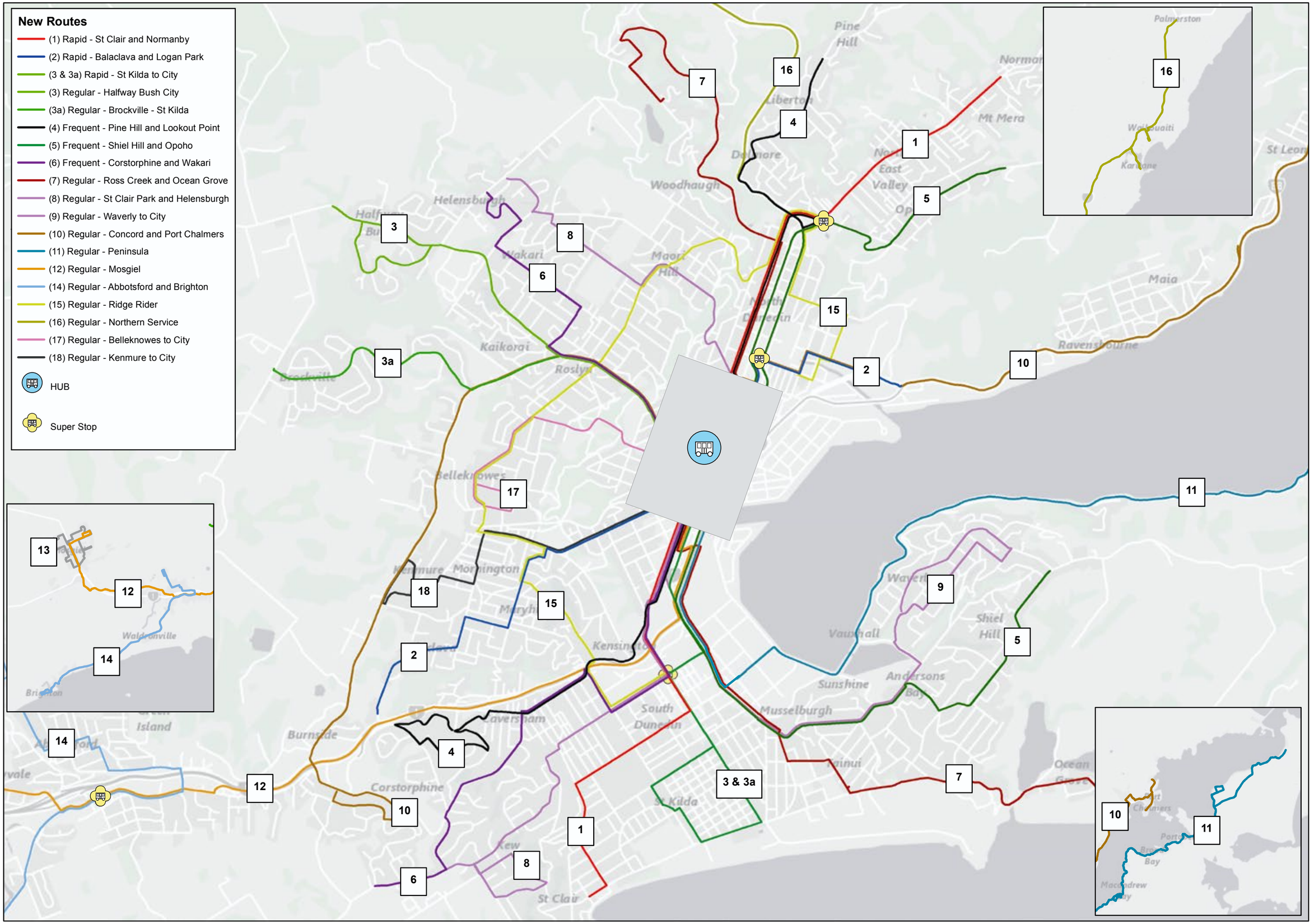


Figure 7. The proposed new bus network for Dunedin

Figure 8. The proposed new Rapid bus network for Dunedin

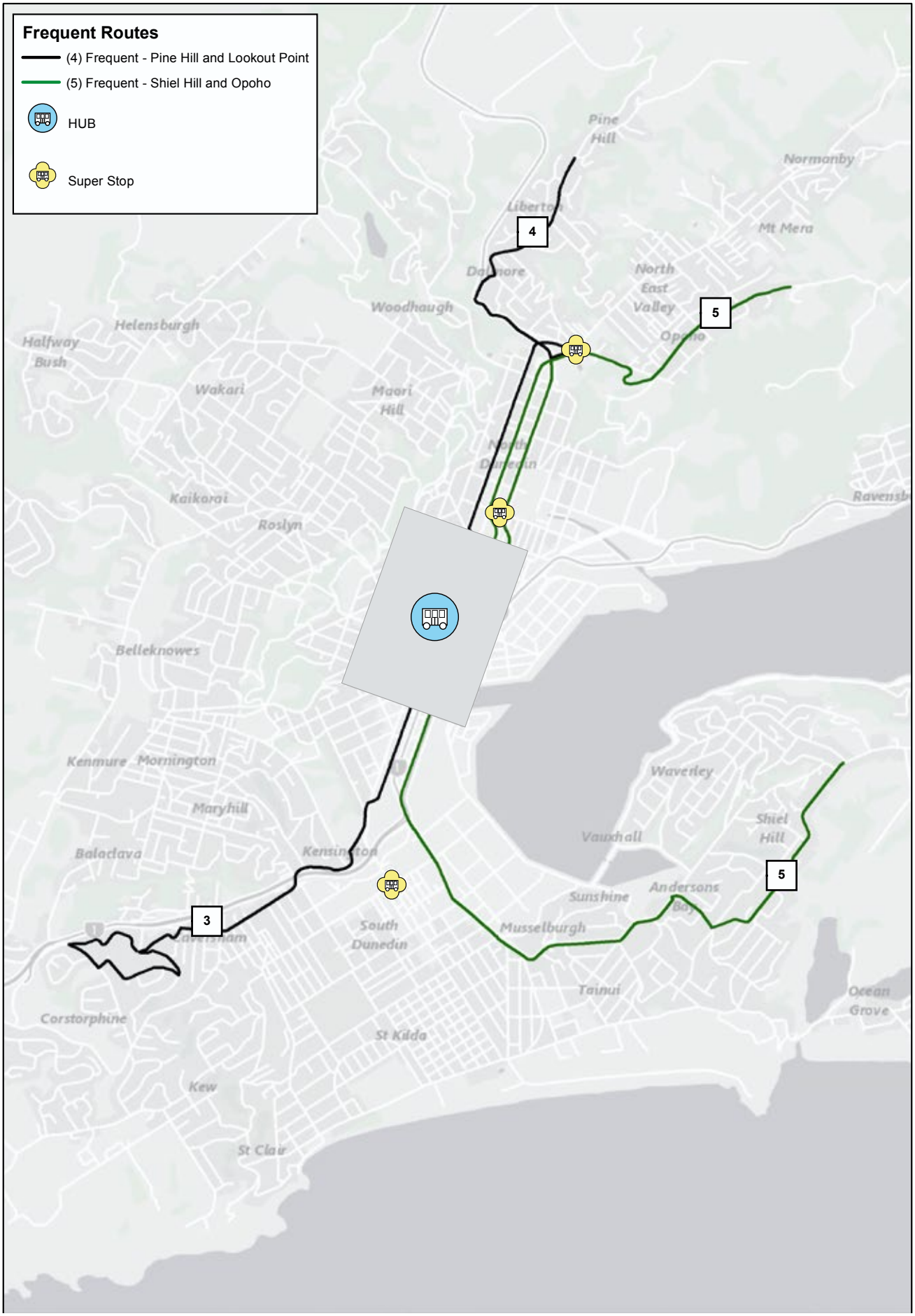


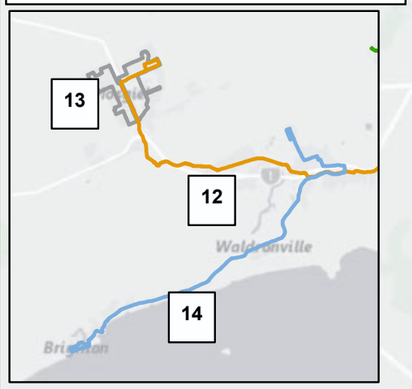
Figure 9. The proposed new Frequent bus network for Dunedin

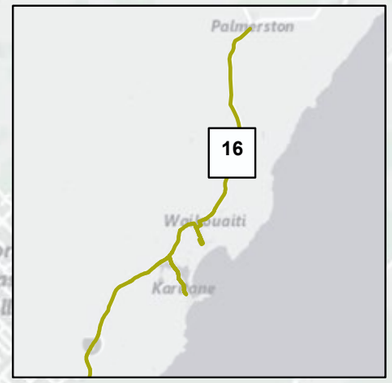
Regular Routes

- (3) Regular - Halfway Bush City
- (3a) Regular - Brockville - St Kilda
- (6) Frequent - Corstorphine and Wakari
- (7) Regular - Ross Creek and Ocean Grove
- (8) Regular - St Clair Park and Helensburgh
- (9) Regular - Waverly to City
- (10) Regular - Concord and Port Chalmers
- (11) Regular - Peninsula
- (12) Regular - Mosgiel
- (13) Regular - Mosgiel Loop
- (14) Regular - Abbotsford and Brighton
- (15) Not yet determined - Ridge Rider
- (16) Regular - Northern Service
- (17) Regular - Belleknowes to City
- (18) Regular - Kenmure to City

HUB

Super Stop





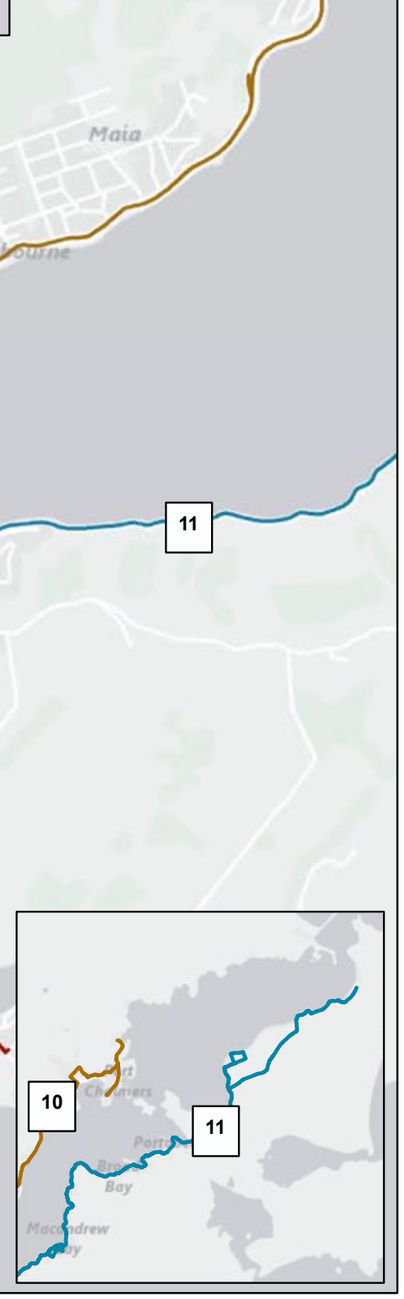


Figure 10. The proposed new Regular bus network for Dunedin

Coordinating timetables in the central city will not only enable people to change buses, it will also enable the development of a central city bus hub where all services can arrive and depart. This will further encourage transfers between services, and will provide a location for centralised bus information and possibly GoCard top-ups. This, combined with pairing routes, will simplify and enhance the user experience of Dunedin bus service. It should also enable us to reduce the number of buses in the central city at any given time of day, and reduce the general congestion currently experienced at our main bus stops surrounding the Octagon.

This integration enables the development of a strong, stable network of bus routes providing significant long-term benefits for the city and surrounding areas, notably:

- good use of infrastructure; using what we already have more often
- support for residential intensification and the continued development of a compact city structure
- support for cyclists and pedestrians to explore multi-modal travel options
- quality public transport supporting the public desire and need to travel; in turn, the public will support the public transport system.

Investing in a network like this will achieve better value for money for those who fund the network; users, rate payers, and NZTA. We propose to implement the following actions to help bring in the new network:

- coordinating timetables in the central city
- simplifying routes
- simplifying and standardising frequencies
- developing a central city bus hub
- continued improvement of the Journey Planner
- continued improvements to the timetable book and on-street information
- consistent route displays on the buses (head signs)
- improved website
- simplified fare structure
- simplified concessions
- pricing of fare products to encourage modal shift while ensuring the long term financial viability of the network
- online topups for GoCard (and investigating kiosk top ups at the bus hub)
- bike racks on all buses and explore the opportunity for bike lockers at the bus hub
- super stops at Green Island, South Dunedin, University, Gardens, and Mosgiel
- consistent bus stop signage and flags in the central city with roll-out on the Rapid network first
- continue to install bus shelters and seating where appropriate
- install tactile guides from shelters to mark the preferred location for passengers to board buses
- ensure all bus stops have pavement to the boarding and alighting areas of the bus
- encouraging the DCC to reduce parking supply or increase parking prices to support bus usage
- make the entire bus journey accessible
- monitoring of customer satisfaction, feedback and utilisation.

Services integral to the new network

Table 5.1 summarises the scheduled services essential for the new proposed Dunedin public transport network. It also shows the three service levels (Rapid, Frequent and Regular) and the anticipated initial frequency as units are introduced (rolled out progressively from 2015 onwards) and the desired established frequency we seek on those routes (by 2021).

While routes are a key component of any bus network, the frequency of services on those routes are crucial. The aim of the new network design is to simplify the frequencies of services to make the timetables easy to remember for regular and infrequent users. **Table 5.1** indicates the initial and targeted weekday frequencies for the network.

Note: Peak services = between 6 am – 9 am and between 3 pm - 6 pm
Off peak services = between 9 am - 3 pm and from 6pm to end of service

Table 5.1. New network essential services in Dunedin

Route	Initial weekday frequency	Target weekday frequency (7 am - 7pm)
Rapid services		
Normanby and St Clair	15 minutes	15 minutes
Balaclava and Logan Park	15 minutes	15 minutes
St Kilda	15 minutes	15 minutes
Frequent services		
Pine Hill and Lookout Point	20 minutes peak 40 minutes off-peak	20 minutes
Opoho and Shiel Hill	20 minutes 40 minutes off-peak	20 Minutes
Regular services		
Corstorphine and Wakari	30 minutes off-peak	30 minutes
Ross Creek and Ocean Grove	30 minutes	30 minutes
St Clair Park and Helensburgh	30 minutes	30 minutes
Waverley	30 minutes peak 60 minutes off-peak	30 minutes
Port Chalmers and Concord	30 minutes	30 minutes
Peninsula	30 minutes peak 60 minutes off peak	30 minutes
Mosgiel (excluding the loop service)	30 minutes peak 60 minutes off-peak	30 minutes
Mosgiel loop	20 minutes	20 minutes
Abbotsford and Brighton	60 minutes	60 minutes
Northern Services	approx 240 minutes	120 minutes
Ridge Rider	60 minutes	30 minutes
Halfway Bush (alternatiing service with St Kilda)	30 minutes	30 minutes
Brockville (alternatiing service with St Kilda)	30 minutes	30 minutes
Belleknowes	30 minutes	30 minutes
Kenmure	30 minutes	30 minutes

Frequencies after 7 pm in the evening will depend on demand but they are likely to be hourly, or at least half the frequency of the daytime service. Saturday, Sunday and public holiday service frequencies will depend on predicted patronage levels but these are likely to be hourly on all but the Rapid routes. Rapid routes are likely to operate on a 30-minute frequency on weekends and public holidays.

From 1 July 2016, school bus services will no longer be integral to the Dunedin bus network. As such, ORC will not contract bus services specifically for school children. The proposed new network routes enable most school children to access their school with, the ability to transfer bus for travel in the zone in which they disembark.

Fare-zone structure and concessions

As part of a review of the bus network in Dunedin, we are reviewing the fare structure and fare levels for Dunedin services. The aim of the fare review is to simplify the Dunedin bus fare-zone system and break down barriers to bus usage, including the cost of services while maintaining acceptable farebox recovery levels.

We are considering new fare products including transfers and are currently exploring different concession/discount options. Actual fare levels and concessions for the Dunedin network will be defined in Council's Annual Plan process for 2015/16. We propose to implement the final fare products and concessions in line with the new ticketing system.

Because we target a *farebox recovery* level of 50%, one of the key outputs in our fare review is to develop a fare structure and fare level system that, based on current patronage distribution and travel patterns, remains neutral in terms of the revenue we receive from bus fares. Due to the need for the increased investment to implement the new network it is expected that the farebox recovery level will drop below the target over the short to medium term.

Fare levels for the Wakatipu Basin Network will be set in consultation with the operator having regard to the commercial nature of the service.

We acknowledge that there is a need to ensure that the public get the best outcome by keeping fares as low as possible, while also taking in account the constraints we face as an agency contracting bus services. The constraints are nationwide constraints that any bus service contracting agency faces, they are not exclusively issues for ORC.

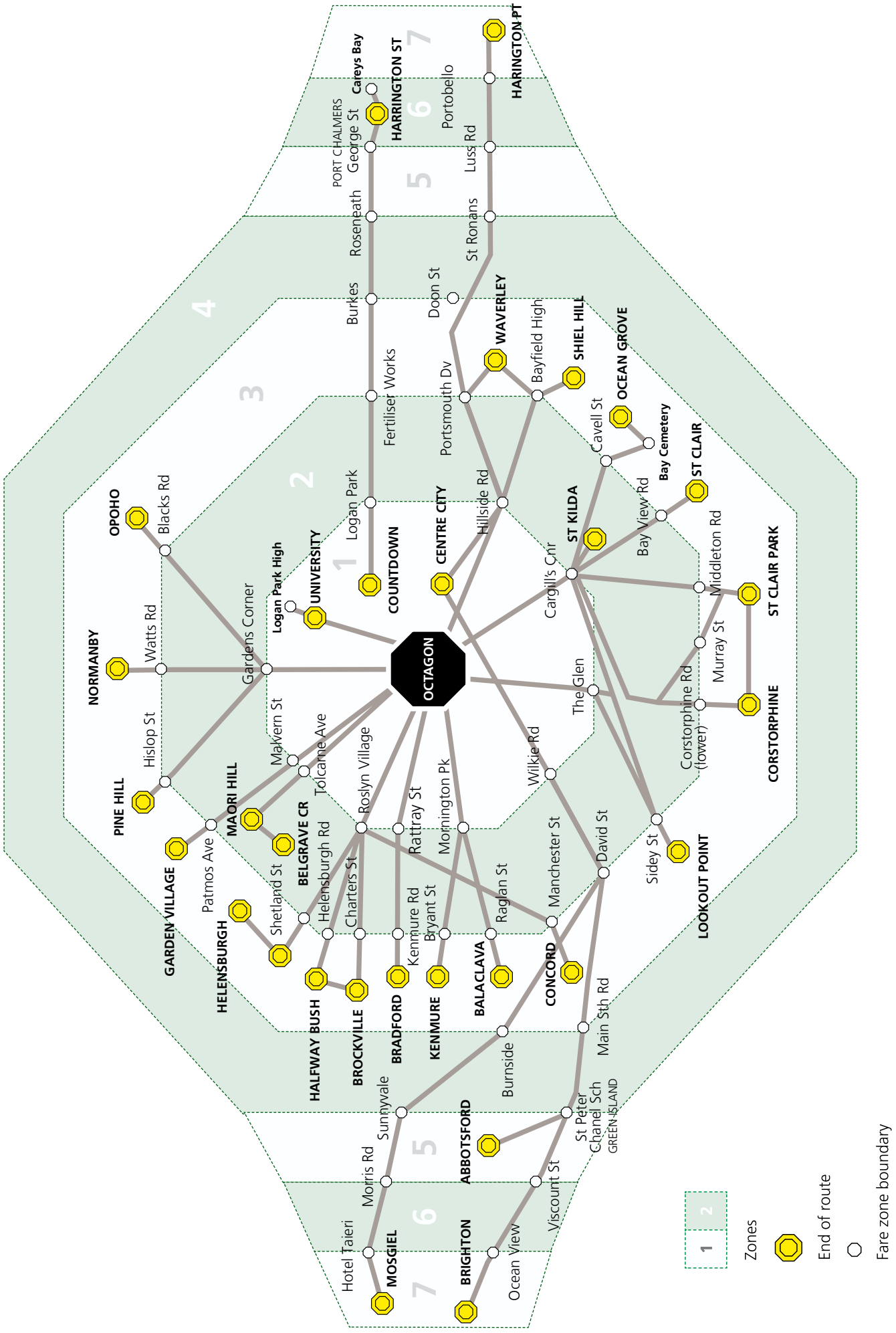


Figure 11. Fare-zone structure: existing seven zone system.

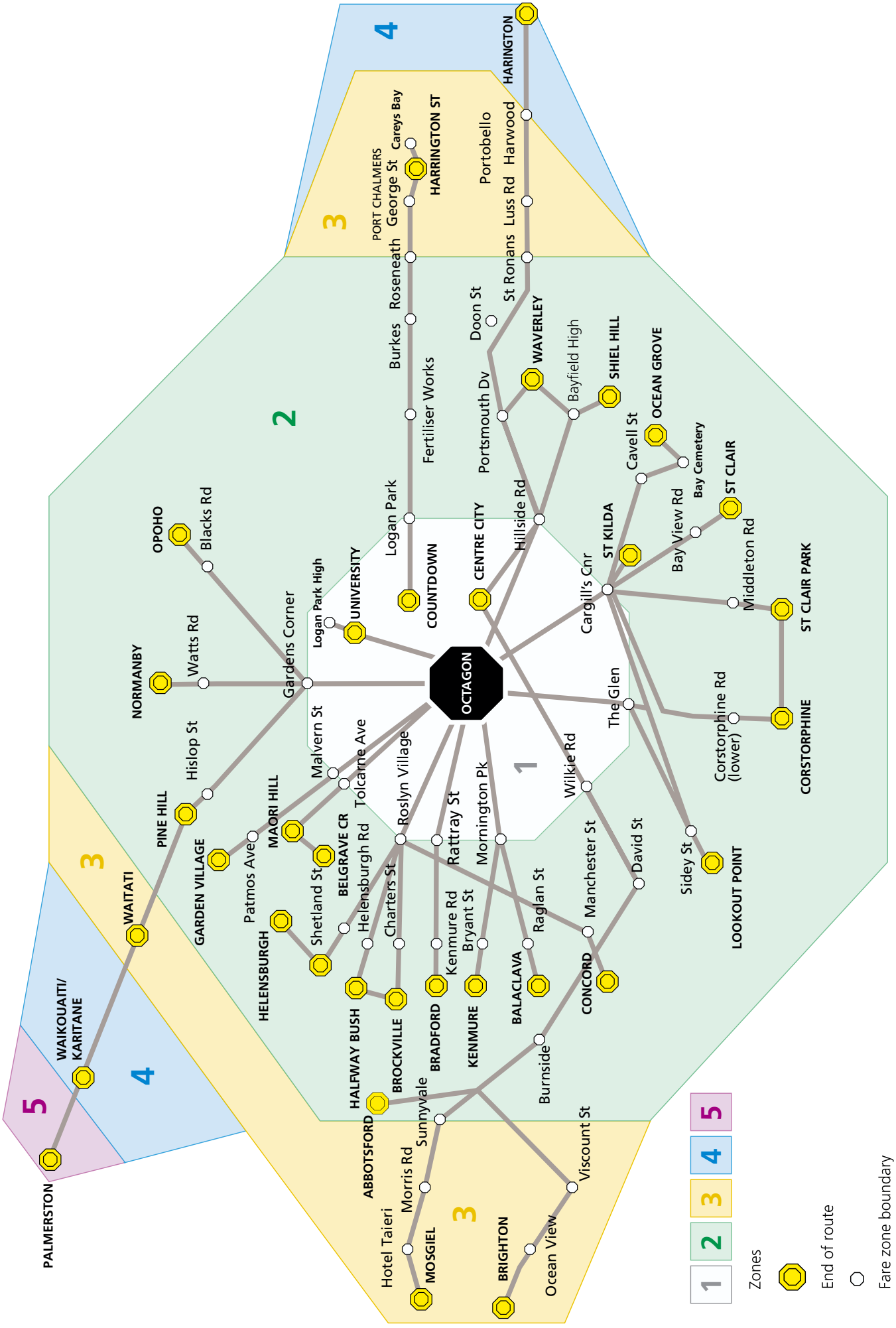


Figure 12. Fare-zone structure to be introduced with new ticketing system.

Fare-zone structure

During the preparation of this Plan we undertook a review of the fare zone structure for Dunedin.

For the Dunedin network the existing fare zone structure Figure 11 will be replaced with the fare zone structure Figure 12 when the new ticketing existing system is introduced.

The existing fare structure for the Wakatipu Basin network will remain until such time as the network has been reviewed and any necessary amendments to this plan are made.

Fare concessions

As part of the fare zone structure review, we are investigating the feasibility of a range of concession options including:

- Child
- Student (tertiary)
- Beneficiary
- Super Gold (where available)
- Off-peak travel, and
- other fare products.

Fare concessions and other fare products will only be available through the GoCard.

The business case approach

To obtain funding from the Government to assist us so that we can continue to develop and maintain our bus network in Dunedin, we need to adhere to process requirements required by the NZTA. One methodology, adopted in 2013, is that of the 'business case' approach.

The approach, developed by the New Zealand Treasury, has been adapted by the NZTA. The NZTA's business case approach guides the planning, investment and project development processes adopted by district, city and regional councils when they are seeking funding for transport-related activities. For more information on this approach, please refer to www.nzta.govt.nz/planning/process/approach.

The business case approach involves the preparation of four key cases or steps:

- strategic case
- programme project case
- indicative case
- detailed case.

Each case builds on the one before, with decision points along the way to determine whether investment remains worthwhile in relation to the desired outcome. In every step of the case-building process, there is a clear link between the strategic outcomes sought and the ability to achieve those outcomes in a realistic and financially sound manner. It seeks value for money, and for Otago, the need to build on the assets we already have.

We are using the business case approach to determine the need for improvements to the Dunedin public transport network. In 2013, we prepared the strategic and programme cases in collaboration with the Dunedin City Council, NZTA and our two Dunedin public transport operators: Ritchies and PT/Citibus (now GoBus).

The indicative a detailed business cases are under development.

We prepared a specific business case for public transport improvements in Dunedin. This case forms the basis for our ability to seek funding for improvements that, collaboratively, we deem will achieve the right strategic outcomes for the city and achieve value for money for our investors; users, rate payers and NZTA.

The business case preparation involved collaboration between the DCC, NZTA, bus operators and ORC. All parties work together to integrate our thinking and achieve the best possible outcome for Dunedin for the money available.

Our business case process enables us to work towards achieving the following key strategic outcomes:

- more people using public transport
- increased value for money from user, rate payer and National Land Transport Fund investment
- increased mobility and access to activities for residents.

The second stage of the business case process involved the exploration of options for improvements to the Dunedin bus network. Together, the stakeholders developed five programme options containing a variety of choices for improvements and degrees of spending. Then, we explored the risks associated with each programme. The outcome was a preferred programme for improvements for the Dunedin bus network with accepted risks.

Work continues preparing and finalising the business case and achieving endorsement from the NZTA to seek funds from the National Land Transport Fund. Key elements of the preferred programme for improvements in Dunedin public transport are:

- central city bus hub
- integrated ticketing and concession options/free transfers
- simplification of bus routes and timetables
- simplification of the fare structure and zone system
- integrating planning and development in the central city with all modes of travel
- ticketing and other technology advancements
- consistent bus stop flags and signage
- improved customer information displays and access
- consistent infrastructure levels of service for bus stops.

Future projects for better public transport

Central city bus hub

To continue to enhance the bus service in Dunedin, we are exploring options for the development of a central city bus hub (interchange). This hub would enable us to provide a specialised service to passengers. Access to bus information, GoCard top ups, connections with the central city and bus routes will enable passengers to maximise their access to the whole city. The ability to transfer bus in a single zone will enhance this ability. We have not yet specified a location, for a central city interchange, but the location needs to be within close walking distance to the key activity centres in the Central City.

Suburban superstops

ORC plans to develop super bus stops at key suburban activity centres through Dunedin. These stops will have a higher level of service than general bus stops in the city. We identified the following locations as desirable for super stops:

- South Dunedin
- Green Island
- Mosgiel
- Gardens (North East Valley)
- University.

It is envisaged that these superstop locations will have support from nearby facilities to enable the provision of full network maps and timetables, seating and shelter, nearby toilet facilities, bike stands and/or lockers, and potentially facilities to enable GoCard top ups and travel products.

Real-time

We are exploring our options for the provision of real-time bus information.

With a real-time system, we are focused on implementing a system compatible with smart-phone technologies and making use of modern technology rather than making use of on-street displays. However, we will explore the provision of real-time display at a central city bus hub and super stops.

6 The future for other public transport services in Otago

In this chapter

Wakatipu Basin bus services

General public transport services in Otago

Wakatipu Basin public transport

Services integral to the network

Essential for the Wakatipu Basin public transport network are all services currently provided on the main public transport routes, including those planned by the operator for implementation (Shotover Country). Services specifically for school children are not considered integral to the network and will not be included in any contracted unit.

The Wakatipu Basin is approaching a period of significant change in public transport services. At present, planning is underway for the Town Centre and Frankton Flats areas, partially to address the congestion issues around State highway 6 and 6A, but also to enhance the function, liveability, and tourism attractiveness of Queenstown. The business case process being undertaken by NZTA and QLDC identifies a number of strategic directions for both of these projects, one of which highlights a potential need for reviewing and enhancing public transport services in the Wakatipu Basin. A review of bus services in the Wakatipu Basin is planned for 2016, any potential changes to services would not be expected prior to 2018.

The Ministry of Education is considering withdrawing from several Wakatipu school bus services. As school services are not considered integral to the urban network, the effect of those potential changes will be examined in the network review, or prior, whichever is necessary. ORC is monitoring the process of withdrawal, but does not have a responsibility to provide or subsidise services to those schools affected.

The ORC will continue to work closely with QLDC, NZTA, bus operators and Ministry of Education in regard to any potential services changes in the Wakatipu Basin.

Future projects in the Wakatipu Basin

The following activities indicate future projects for the Wakatipu Basin:

- an extension to the current Lake Hayes service to enable bus services from Shotover Country to Frankton.
- real time information for customers
- exploring and supporting options to reduce traffic congestion around Frankton on state highways 6 and 6A
- the creation of patronage targets
- reviews of service frequencies and bus routes 2016
- review of the fares
- bus stop infrastructure
- marketing
- new ticketing system.

General Otago public transport

Services important to the wider public transport network

We consider the following services to be important for the wider Otago public transport network:

- inter-regional bus services
- exempt public transport services
- excluded public transport services

These services do not form or belong in any unit under the PTOM, nor will they be subsidised by the ORC, but we do acknowledge their importance to the mobility of residents and visitors in and around Otago.

Planning and improvement to these services are undertaken by private businesses and the Ministry of Education for students who can not easily access their school.

7 How this plan guides our journey

In this chapter

Units for public transport services

The policies applying to public transport units in Otago

Units for public transport services

A requirement of government legislation is for us to enable the growing commerciality of public transport services. Part of the Strategy for increasing the commercial viability of services and reducing the reliance on government subsidies is the letting of bus contracts based on units.

A unit, under PTOM, is a group of routes contracted to one operator and contains all of the timetabled services applying to the route or routes within that unit. A unit must be exclusive (so that the operator has full responsibility and market access on those routes 24 hours per day, on any given day). The unit also needs to be a 'marketable whole'; meaning they need to be a commercially viable unit.

The benefit of exclusive units is that operators are motivated to grow and develop their patronage without the risk of sharing patronage (and revenue) with another operator. There will be roads where more than one route and operator will share patronage. The key requirement here is to coordinate timetables to optimise frequencies and to prevent uneven opportunities for patronage and revenue.

Working with our operators, we have designed a series of six units for public transport in Otago.

Principles of the Unit design are:

- Linking routes to enable travel where people want to go
- The ability of each unit to be a marketable whole
- Routes or suburbs where operators have established reputations
- The location and components of commercial routes
- Having sufficient units of sizes that will enable a competitive bus operator market to ensure competitive pricing

As part of our transition to PTOM (refer to chapter 8), we will implement the unit design as staged approach when contracts expire, and these units will incorporate the new network design. Refer to the tables outlined below to see the route composition of each unit. Maps of each unit are in **Appendix 5**. Policies that apply to those units are later in this chapter.

Dunedin

Table 7.1. Unit 1

Route	Route pair	Network
Balaclava	Logan Park	Rapid
Logan Park	Balaclava	Rapid
Concord	Port Chalmers	Regular
Port Chalmers	Concord	Regular
Northern services		Regular
Peninsula		Regular

Table 7.2. Unit 2

Route	Route pair	Network
St Clair	Normanby	Rapid
Normanby	St Clair	Rapid
Corstorphine	Wakari	Regular
Wakari	Corstorphine	Regular
St Clair Park	Helensburgh	Regular
Helensburgh	St Clair Park	Regular

Table 7.3. Unit 3

Route	Route pair	Network
Pine Hill	Lookout Point	Frequent
Lookout point	Pine Hill	Frequent
Shiel Hill	Opoho	Frequent
Opoho	Shiel Hill	Frequent
Ridge Rider		not yet determined

Table 7.4. Unit 4

Route	Route pair	Network
Halfway Bush/Brockville	St Kilda (Rapid)	Regular/Rapid
St Kilda (Rapid)	Halfway Bush/Brockville	Rapid/Regular
Waverley		Regular
Ocean Grove	Ross Creek	Regular
Ross Creek	Ocean Grove	Regular
Belleknowes		Regular
Kenmure		Regular

Table 7.5. Unit 5

Route	Route pair	Network
Mosgiel		Regular
Mosgiel loop		Regular
Abbotsford	Brighton	Regular

Wakatipu Basin

Table 7.6. Unit 6

Route
Remarkables Park / airport to Frankton / to Queenstown (and return)
Frankton to Arrowtown (including Glenda Drive and Quail Rise) (and return)
Frankton to Lake Hayes Estate / Shotover Country (and return)
Frankton to Lake Hayes / Shotover Country
Queenstown to Fernhill and Sunshine Bay (and return)
Frankton to Kelvin Heights (and return)
Queenstown to Arthurs Point to Arrowtown (and return)

Implementation of units

Dunedin services that were commercial prior to the 2013 amendment to the LTMA, will be implemented into a unit no later than 1 July 2016. Other services will roll into units as the contracts expire and routes are unbundled. The Procurement Strategy will indicate timing, but we anticipate all units, except unit 3, to be in place no later than December 2016. We expect unit 3 to be in place by 1 July 2019. This date accommodates two contracts expiring mid 2019.

Wakatipu services will not be transitioned into a PTOM contracted Unit or Units until after a Network review has been completed. The network review is being scheduled for 2016.

Common Corridors

A common corridor is where bus routes from different units will converge and use the same roads. These corridors are not commercially exclusive markets as different operators, contracted by council to provide services, will operate on those corridors. The following corridors are common for the Dunedin bus network:

- Hillside Road
- South Road
- George Street
- Princes Street
- Andersons Bay Road
- Musselburgh Rise
- Cumberland Street
- Crawford Street
- Castle Street
- Albany Street
- Stuart Street (lower and upper)
- High Street
- The location of any bus hub
- Bank Street
- Stuart Street
- State Highway 1 - Mosgiel through to Palmerston
- Kenmure Road

Policies guiding our journey

This section of the Plan sets out the policies and actions guiding our journey to making public transport suit peoples' needs within our financial boundaries There are nine policy areas in this Plan that guide our journey to a better public transport system for Otago. They are:

7.1 Integrated networks

7.2 Network structure, services and bus stops

7.3 Service quality and performance

7.4 Fleet and vehicle quality, performance and identity

7.5 Fares and Ticketing

7.6 Physical on-street infrastructure

7.7 Information, timetables and journey planning

7.8 Procurement

7.9 Monitoring

Each section states what the policies apply to and their implementation.

Ultimately, the full implementation of policies depends on the public supporting public transport by using the bus services, and the funding available for those services.

These policies apply to all units in Otago and we expect the provisions of Unit contracts with public transport operators to reflect the policies and actions in this chapter.

7.1 Integrated public transport networks

These policies apply to contracted bus services and units in the Dunedin and Wakatipu Basin networks. Figures 2 and 3 (in **chapter 3**) show the outer boundaries of each integrated network.

We will implement these policies through contracts, and ticketing technology under the LTMA including the PTOM.

Policy 11

Urban public transport in each of the following areas operates as an integrated urban public transport network, meeting community needs and growing patronage while incentivising commercial behaviour in order to keep public costs to an acceptable level:

(a) Dunedin metropolitan area, including Port Chalmers, Otago Peninsula, Brighton, Mosgiel, Waitati, Evansdale, Karitane, Waikouaiti, and Palmerston
(b) Wakatipu Basin, including Fernhill, Sunshine Bay, Arthurs Point, Frankton, Lake Hayes Estate, Shotover Country, Arrowtown, and Kelvin Peninsula.

Policy 12

Managing each integrated public transport network will:

(a) ensure that urban public transport functions as one system (without services tailored to different customers) successfully catering to the majority of potential customers, through operational economies of scale and progressive optimisation of the network
(b) enable route and timetable changes to ensure attractiveness to potential users
(c) grow patronage to support community wellbeing and resilience.

Policy 13

(a) Matters consistent within each integrated network are: standard of service, reliability and punctuality, fare structure (including concession fares), vehicle quality, standards of customer service and infrastructure.
(b) Matters consistent across both networks are: the ticketing system and other technology where appropriate.

We will adhere to the monitoring requirements from the NZTA as technological improvements allow. See **Appendix 6** for further details of the indicators that ORC intends monitoring.

7.2 Network structure, services and bus stops; service grouping

These policies apply to contracted bus services in the Dunedin and Wakatipu Basin networks, and bus stops.

ORC will implement these policies:

(a) through ORC working with the territorial local authorities and NZTA in consultation with bus operators to ensure road markings and bus stops in the networks are of adequate configuration, length, lighting and are numbered
(b) through the guidelines for service planning
(c) as we transition existing contracts into PTOM contracts in accordance with a procurement strategy.

Policy 14

(a) each entire route within an integrated network encompassing weekday, evening, weekend and public holiday services to be operated by a single operator, and to be achieved in Dunedin within five years of the Plan being adopted
(b) all services on a route, whether daytime or evening, weekday, weekend or public holiday, to follow the same base route, with regular timing subject to affordability.

Policy 15

Network structure is:

(a) in Dunedin: An overall radial route structure running through key transfer points designed to optimise coverage and connectivity of the network
(b) in Wakatipu Basin: A main spine route connecting central Queenstown, Frankton, the airport and Remarkables Park with services to other areas connected to this spine through transfer points.

Policy 16

When timetabling services, create opportunities for quality transfer points in the central city at superstops to allow easy transfers. Superstops are also required in the following areas:

(a) the Dunedin network: the Gardens, the tertiary campuses, Mosgiel, Cargill's Corner in South Dunedin, Green Island
(b) the Wakatipu Basin network: the centre of Queenstown town centre and at Frankton.

Policy 17

Preference is for routes, timetables and capacity in the integrated networks to accommodate school travel on services planned for general public use.

Policy 18

(a) In built-up urban areas, spacing between bus stops of 300 and 400m are desirable in most situations, certainly no more than 500m apart and no less than 200m apart.
(b) In areas of very low housing density, such as a semi-rural locality, stop spacing should take into account the locations of houses (or facilities to which people want to travel to/from).

Standard for service planning

I	The following minimum loading levels are for service planning purposes only. (Note that these minimum loadings do not apply when services are needed for positioning purposes, or when one leg of a return service routinely meets these minimum loading levels. The aim is for the network as a whole to be viable rather than each individual service: See Policy 4.) The average minimum loading levels for each trip (peak direction) on each route on an average weekday should be as follows: (a) peak periods: at least ten passengers per trip (b) other times: at least five passengers per return trip. If these minimum loadings are not reached on any service over a three-month period, then options to address this include: (a) actively encouraging more use of the service (b) adjusting bus service frequencies to even out patronage loadings (c) retaining the status quo (d) withdrawing the service.

7.3 Service quality and performance

These policies apply to contracted bus services, and those in units, in the Dunedin and Wakatipu Basin networks.

We will implement these policies through:

- contracts: see standards and provisions for service performance and quality, below (business as usual).
- a customer care and quality management system
- instituting a code of conduct for passengers and displaying it on all buses

Matters beyond ORC control:

- Territorial local authorities and NZTA are responsible for improving the management of traffic flows to enable buses to avoid being slowed by traffic congestion.
- Territorial local authorities have the discretion to give priority to public transport to travel on roads temporarily closed to traffic. If this is not possible, then they choose to re-route bus services as close to normal routes and timetable as possible.
- Those responsible for managing temporary road closures or detours are responsible for advising the public, ORC, and bus operators and making temporary arrangements for bus users.
- Those planning events that will close all or part of the Octagon, or any other critical length of road used by buses, are responsible for consulting with the ORC, road controlling authorities and operators well in advance of the event.

Policy 19

ORC manages the quality of the integrated public bus networks by:

(a) defining quality standards
(b) working with operators and territorial authorities to manage complaints to retain customers, address complainants' concerns, minimise customer dissatisfaction with the service.

Policy 20

Customers are involved in the quality of bus services through:

(a) consultation
(b) customer satisfaction surveys and/or user panels
(c) customer observations reported to ORC.

Policy 21

The provider of a bus service does not bear any liability to customers for any deficiency caused by outside influences beyond the provider's control.

Policy 22

(a) Operators and ORC monitor loadings on services to provide adequate capacity.
(b) Under normal conditions of service, bus customers are either seated, or if standing for only short or occasional periods (e.g. during peak time). Preferably, no customers would be required to stand.

When it becomes necessary for customers to stand on a regular basis, operators and ORC explore the provision of additional seating capacity, through increased bus size (capacity), additional buses or the need to increase the frequency of services.

Policy 23

Bus customers and drivers act courteously. Bus drivers provide quality customer service and operators ensure that the service is seen by customers as 'customer-friendly'.

Standards for contracts

Reliability standards

II	The punctuality of a bus service is dependent on meeting scheduled times. Scheduled bus services in an integrated network must conform, within a specified tolerance, with officially designated timing points set by ORC, which may include some timing points not included in published timetables. The level of tolerance will be in the range of 59 seconds before to 4 minutes and 59 seconds minutes after the departure time.
III	No bus must depart the terminus before the specified departure time.
IV	Traffic conditions and the number of passenger loadings may affect journey duration.

Punctuality standards

V	All scheduled bus services in an integrated network must pick up all passengers waiting at designated bus stops on their contracted route.
VI	Operators must have contingency measures in place to ensure that, should a bus trip not run due to matters deemed to be within the operator's control, passengers are not left stranded unless weather or road conditions preclude this.

Performance and quality monitoring standard

VII	Operators must monitor missed services and complaints in real time, acting quickly to rectify matters when required, and report back complaints and actions to ORC.

Service providers and customer service standard

VIII	Public transport service providers must employ fit and proper staff to deal with customers and must train both management and service staff in customer service, including specialised training in assisting passengers with different access and mobility requirements, including those with disabilities, mobility aids, prams or strollers. Staff interfacing with customers must be neatly and cleanly attired, and polite and courteous.

Driver's role in seating arrangements standard.

IX	Anybody in a wheelchair or with a child in a pram/stroller/carrier must be given priority for use of the priority wheelchair space on a bus.
X	It is the bus driver's role to try and accommodate passengers. This may require the driver rearranging, when possible, passengers who are occupying seats in the designated wheelchair space. ORC supports bus drivers arranging passengers to assist those with different access and mobility requirements to obtain suitable seating.

7.4 Fleet and vehicle quality, performance and identity

These policies apply to contracted bus services in the Dunedin and Wakatipu Basin networks and unit contracts under PTOM (as they are implemented).

We will implement these policies:

- through contracts (see standards and provisions for fleet and vehicles)
- should small vehicles be needed on a service, ORC will include appropriate specifications in the pertinent tender/contract documentation.
- through ORC applying RUB standards progressively to all new contacts, including those that expire and are retendered (the last contract expires 30 June 2019). (Note that RUB's standard for existing buses will not be applied until 1 July 2015.)
- by making bike racks mandatory on any bus operating a new contract.

The Government has introduced mandatory standards for urban buses: 'Requirements for Urban Buses in New Zealand, New Zealand's common standard for urban bus quality (2011)', which were published by NZTA on 14 September 2011. RUB standards allow buses to remain in the fleet until age 20, at which time they 'age out' and must be replaced. The mandatory requirements, also known as 'RUB', form the basis of the fleet quality for the Plan. There are separate standards for:

- buses entering the urban bus fleets for the first time (whether new or second hand) - these apply from 1 July 2012 to buses entering either the Dunedin and Wakatipu network fleets
- existing buses in the fleet - these apply from 1 July 2015.

Policy 24

If ORC chooses to adopt a network brand, contracted operators will be required to display it.

Policy 25

(a) NZTA's Requirements for Urban Buses apply as the standard for the vehicle fleets operating the networks, and will be phased in through all new PTOM contracts for bus services (including mandatory air conditioning).
(b) Bike racks are required on all buses operating any new bus service contract.
(c) ORC sets a minimum operational fleet profile for the bus fleets in the networks to ensure comfortable, modern, safe, reliable, affordable provision of services.
(d) Vehicle emissions are to be reduced progressively through an increasing percentage of public transport services operated by modern vehicles, and through all public transport vehicles being maintained in accordance with the manufacturer's specifications.

Policy 26

For contracted services, ORC confirms vehicle- quality standards before tendering and includes these in tender documents.

Policy 27

From 1 July 2016, for each operator of contracted public transport units, the number of buses aged 0-10 years shall be equal or greater than 50% of their fleet.

Standards for contracts

Transition to RUB

XI	Existing standards continue to apply until contract expiry. The provisions in this plan concerning RUB and the minimum fleet profile apply to any new contract.

Standard measurement practice

XII	There are two types of occasions when ORC assesses whether a vehicle can be used on a service: 1. when assessing the list of proposed vehicles to be used on a contract, supplied by a tender, and 2. when an operator applies to add a vehicle to the fleet for use on a contracted service.

7.5 Fares and ticketing

These policies apply to contracted bus services in the Dunedin and Wakatipu Basin networks.

We will implement these policies:

- through contracts: See standards and provisions for fares/ticketing (business as usual)
- through management of ORC's integrated ticketing system (business as usual)
- through ORC seeking a common fare structure in each network
- ORC promoting GoCard as its preferred method of collecting fares
- through ORC considering:
  - (a) new fare products able to be introduced under a new ticketing system
  - (b) a more appropriate fare zone structure for the Dunedin network
  - (c) an integrated fare system in Dunedin with apportionment of fares between operators.

Funding and procurement principles

1. Funding policy that reflects how public transport confers direct and indirect benefits to different groups to ensure fairness in contributions to network costs
2. Procuring services in a way that ensures those services are priced competitively
3. Services are priced competitively to promote commerciality.

Policy 28

(a) Public transport networks use a common integrated ticketing system that is rapid and easy to use, and allows integrated fares.
(b) All operators of services contracted or defined as integral to the public transport networks are required to participate in ORC's integrated ticketing system.

Policy 29

(a) A common fare structure and fare products operate within each integrated network.
(b) ORC sets maximum fares for the Dunedin Network during the annual plan process each year.
(c) When reviewing fare levels, ORC gives regard to the desire to fund the bus network equitably, increase bus patronage, affordability and convenience of bus travel, along with the need for operators to make a fair profit and allowing for both operators and ORC to fund improvements.
(d) ORC uses 50 % as the target for farebox contribution to the cost of providing services in a network that receives public subsidy, but accepts a lower recovery, if necessary, to manage the transition to an improved bus system with substantially increased patronage and equitable funding.
(e) Operators in each integrated network provide customers with a range of ticket types (products), provided these are able to be accommodated within the integrated ticketing system.
(f) Operators in each public transport integrated network offer a discount as an incentive for using a card.
(g) The ticketing system and fare structure allow free transfers within a single zone on the same day within specified limits when the ticketing system is upgraded. To facilitate this, operators are required to participate in an integrated fares system.
(h) The fare system assists, through concessions, those who would otherwise find it difficult to afford bus fares to travel to work and education, or to access food shops, health and welfare services. These mandatory concessions include a child-fare concession and free travel for children up to age five.

Policy 30

In the Wakatipu Basin, bus fares are set by the operator in conjunction with the ORC. Once the services are contracted by the ORC under new PTOM unit contracts, ORC will set a maximum fare level, in consultation with the bus operator(s) providing the service.

Explanation of the farebox recovery policy (29(d))

Bus services in the two integrated networks are funded differently. Services in the Wakatipu Basin are funded by bus fares, where as those in Dunedin are funded by a combination of bus fares and public subsidy split between rates and the National Land Transport Fund (the latter funded by road users).

A farebox recovery target of 50% has been adopted by Council and is in line with the NZTA's national target. This means that approximately half the cost of operating a public transport service is funded from bus fares. ORC has had a target of 50% fare-box recovery for the Dunedin network since 2005, and it has been achieving this target since 2010/11.

ORC considers funding up to a 50% level of farebox recovery provides for equitable sharing of the costs of operating public transport between those who benefit directly – bus users – and those who benefit indirectly. The public subsidy, where it exists, reflects the indirect or 'spillover' benefits received by motorists, freight transporters, the wider community and the environment.

Each year, ORC takes into account its target farebox recovery for each network when reviewing budgets, projected transport rates and fare levels for each network.

This process requires attention to projected patronage and fare revenue, along with any likely changes in operating costs and any improvements to be funded. Actual fare-box recovery can only be calculated after the fact, at the end of each financial year. (See page 91 below for the formula used.) If services in a network receive no public subsidy, then the target of 50% farebox recovery is no longer appropriate. An operator needs to recover all operating costs, plus profit, from fares.

In providing for equitable funding of public transport, ORC's policy on farebox recovery contributes to the following statutory documents:

- the 2011 RLTS's desired output of viable public transport, which requires users to be willing to pay a sufficient share of operating costs through fares to ensure the network's viability, and the community to be willing to support the network through rates
- this Plan's goal of Otago's passenger transport being viable and meeting community needs the Government Policy Statement on Land Transport Funding 2012/13 – 2021/22's goal of increasing the value for money on the investment in public transport services through increased efficiency and patronage growth, ensuring public transport does not require increasing levels of subsidy in line with the purpose of the LTMA.

Standard for ticketing system

XIII	The ticketing system should: • be rapid and easy for customers and bus drivers to use • provide a robust administrative platform for operational control of the network • provide a network banking system for distributing fares amongst operators • provide a suitable platform for further improvements to the network and any new fare arrangements that ORC might decide from time to time • be capable of providing good understanding of passenger travel patterns, to aid planning and managing the public transport network • support use of an integrated fare structure.

Provisions for contracts

A	Entry to ORC's integrated ticketing system is open and equitable to all operators, including any new operators approved to enter a public transport network. Any operator providing network services in the Dunedin or Wakatipu Basin integrated networks must use the ORC's integrated ticketing system on all services which that operator provides on that network. All travel on these networks must be recorded through the integrated ticketing system.
B	For the Dunedin integrated network, the current fare structure, based on seven concentric zones (or less), must apply to all services until a new fare structure is implemented with the implementation of the new ticketing system. The current fare structure is based on a number of geographical zones covering the area in which the service is provided. Passengers pay the same fare for travel anywhere within the same zone and a higher fare for travel into another zone. The fare must be determined by the number of zone boundaries crossed. The new fare structure will apply to all contracted Units in the Dunedin integrated public transport network, including the norther services, which shall become part of the Dunedin network. The Wakatipu Basin integrated network is to be operated under the existing structure unless agreed by ORC.

Explanation regarding the SuperGold Card concession

The Government funds this concession, which provides free off-peak travel for SuperGold Card holders, on services in the integrated networks. This concession is only available through use of a GoCard. The Government may review this concession at any time.

ORC procedures on fare setting and farebox recovery calculation

C	ORC will review maximum bus fares annually, as part of its annual planning. ORC adopts, by resolution, a separate fare schedule for the Palmerston – Dunedin northern weekday service until implementation of the new ticketing system and network on 1 July 2016. ORC will review the fare structure for Palmerston before integration into the Dunedin integrated public transport network.
D	ORC will use NZTA's method for calculating farebox recovery.

The farebox recovery ratio (FRR) will be calculated using the formula below, separately for each network:

$$FRR = (F_T + S_3) / (F_N + S_T)$$

Definitions and data requirements

Item	Notes
Farebox revenues F_N Farebox revenues	Farebox revenues – net contract + commercial services
F_G Farebox revenues	Farebox revenues – gross contract services
F_T Total farebox revenue	$= F_N + F_G$
Operating subsidies	Cover total payments to operators, from whatever sources (apart from farebox)
S_1 Contract payments	Contract services
S_2 Concession fare payments	Contracted and commercial services (as applicable)
S_3 SuperGold Card payments	Contracted and commercial services
S_T Total subsidy payments	$= S_1 + S_2 + S_3$

7.6 Physical bus infrastructure on-street

These policies apply to the Dunedin and Wakatipu Basin integrated networks.

We will implement these policies through:

- ORC investigate, with DCC, suitable locations for public transport structures
- QLDC planning, funding the local share and installing bus infrastructure in the Wakatipu Basin network
- the installation of new shelters and other public transport infrastructure.

Policy 31

Public transport infrastructure;

(a) is accessible to those with different access and mobility requirements.
(b) is planned in consultation with the road controlling authority and the operators.
(c) provides for the safety of the network users.

Policy 32

ORC works with territorial local authorities and (for state highways) NZTA to provide infrastructure, street furniture and fixtures for public transport services.

7.7 Information, timetables and journey planning

Policies 33, and 35 apply to all of Otago: all contracted services, all commercially registered public transport services / exempt services, private hire, shuttle and taxi services. Remaining policies apply to contracted and registered exempt services integral to the Dunedin and Wakatipu Basin networks.

We will implement these policies through:

- contracts, and
- timetable information delivered through the web, on-street, the call centre and in hard copy, and a journey planner

Policy 33

The operator shall ensure information about exempt services is available to the public to assist their travel planning.

Policy 34

(a) Route, timetable and fare information for the integrated networks is available to the public in accessible, easy-to-use formats, including information on each route, on-street timetables at boarding stops where considered appropriate, and information about bus stop and shelter location.
(b) When there is more than one operator in an integrated network, ORC coordinates the production of consolidated route, timetable and fare information. Operators bear the costs of producing individual route timetables.
(c) Each operator of an exempt service (or one deemed to be exempt) is expected to produce and maintain on a public internet site, and to print and make available on their vehicles information on their routes, timetables and fares.

Policy 35

(a) To monitor the number of trips being made on public transport region-wide, ORC will require all registered exempt public transport services integral to the network to supply it with patronage data.
(b) ORC treats as confidential any commercially sensitive information that operators supply to it for planning purposes.

7.8 Procurement

These policies apply to the Dunedin and Wakatipu Basin integrated networks and to any contracts commenced as a PTOM unit.

We will implement these policies:

- in how we manage contracts in transition to PTOM
- in how we work with our operators to plan for service improvements and changes to the bus network
- in how we approve or decline applications for Exempt services.

Amendments to the LTMA in 2013 introduced a new policy and operating framework for the procurement and management of urban bus services. This new framework (PTOM) seeks to build a commercially based partnering approach between procuring authorities (ORC) and public transport operators. It is also designed to provide incentives to reduce reliance on subsidies by promoting increased commerciality of bus services, and providing a more transparent approach to service planning and procurement.

Under the new framework, we will procure all public transport units through performance-based contracts. This creates an environment where goals and objectives align through collaborative planning, joint investment, performance incentives and shared risks and rewards.

All public transport services in the two integrated public transport networks are required by law to be provided by contract to ORC in units with or without subsidy. This enables the implementation of the actions and policies in this plan.

There is a transition period between the adoption of this Plan and full implementation of the PTOM contracting environment.

Policy 36

Ensure the appropriate allocation of roles, responsibilities and risk between the ORC and operators, using PTOM.

Policy 37

Identify Exempt services not subject to PTOM contracts.

Policy 38

Implement a partnering approach to all network planning and service changes.

Policy 39

Manage the transition from existing contracts and commercial/deemed Exempt services to the future PTOM environment.

Policy 40

Ensure that the operation of Exempt services does not adversely affect the wider public transport network.

7.9 Monitoring

ORC will undertake monitoring of Otago's public transport services including:

- Monitoring of units
- Monitoring for achieving the objectives and targets of the Strategy
- Monitoring the effectiveness of public transport to Dunedin and Queenstown airports

The policies of the Plan are designed to help achieve the targets set out in Appendix 6.

Policy 41

Undertake regular monitoring and reporting of service, unit and system performance in Otago.

Policy 42

Comply with all unit and network monitoring requirements of the NZTA as technology allows.

How we will reduce reliance on government monies

As part of implementing PTOM in Otago and attaining successful partnering with our operators, we can use a financial incentive mechanism, on subsidised units, to:

- Ensure that both parties have a financial interest in unit performance
- Incentivise collaboration to improve unit performance

Any mechanism we adopt will apply to all subsidised unit contracts and be separate from any cost indexation and key performance indicator processes or payments. There are four principles of the financial incentive mechanisms:

- Incentivise both parties to collaborate to grow patronage and revenue
- Take account of unit and regional market characteristics
- Be simple to apply and administer
- Contribute to value for money.

ORC will apply a financial incentive mechanism to its Unit contracts. The incentive mechanism will be outlined in the Procurement Strategy.

8 Implementation plan

In this chapter

How we will transition our services to fit the national operating model

How we will transition our services to fit the national operating model

Wakatipu Basin

A complete review of the Wakatipu Basin Network is proposed in 2016. The Network review will determine the final network structure including routes, frequencies, extent of services, unit(s) composition and final transition plan.

Existing commercial and contracted services will continue to operate until a final transition Plan is determined.

Dunedin

To achieve an efficient, value for money transport system that takes people where they want to go, when they want to go, we must transition the Dunedin network from what it is now, to how we want it to be in the future. The improvements we propose aim to increase patronage by retaining and growing the customer market and reducing the reliance on government subsidy.

The Plan recognises that to meet the future needs of Dunedin there will need to be further investment in the public transport network to improve service levels. To achieve this, the Plan outlines a range of improvements to services and supporting infrastructure to retain and grow the regularity and number of bus users, as well as attracting new users.

The Plan has a ten-year view and incorporates the following planning approach:

- to simplify the network to create consistency in routes and certainty in timetables
- to provide information to users in a manner that is timely, clear and accessible
- to integrate public transport into the city land use
- to ensure that route and frequency improvements can be successful
- to identify changes needed to maximise the benefits a central city bus hub can provide for the city and its residents.

To achieve this view we must make the best use of our resources, in terms of funding, infrastructure and people. Our approach provides an integrated and simplified network and fare structure, which allows us to improve the levels of service through better use of what we have and realistic customer demand projections.

To achieve successful implementation of PTOM contracts from our existing contracted and deemed exempt services, we need to carefully plan our transition to ensure a seamless process for the travelling public. **Table 8.1** shows how we will transition the various elements of the bus network in Dunedin.

Table 8.1. The proposed transition to an effective public transport network in Dunedin

	Current (2014)	Transitional (2015-19)	Established (by 2020)
Route structure	Complex with numerous central city termini and routes that change throughout the day	Retain existing central city termini, have routes that are stable all day, identify and implement a bus hub and super stops, subject to funding	Develop central city interchange for buses, passenger information and services
City access	Good access to the central city, but limited access around the city without paying to change bus	Connect routes to enable through journeys to locations with high demand	Transfers enable wider city access for people travelling from locations outside the central city
Tickets and fares	Reviewing fare products/concessions and the complex fare zone structure	Implement new simple fare zone structure and products with an integrated ticketing system	Maintain fare products and integrated ticketing and enable online top-ups for GoCard
Infrastructure	Shelters, seating and timetables on-street at many stops	Shelters and seats where needed with timetables at all boarding stops Full network information at key passenger locations	Central city hub where passengers can access bus information
Service performance	Route timings not always accurate and route variations impact on timings	Reliable route timing and performance with no variations to routes	Buses arrive where they are meant to at the times they are meant to
Customer information	Complex because of route structure and timetables	Simple and clear information and work towards it becoming fully accessible	Implement information that is accessible for those with impairments
Service procurement	Commence development of PTOM compliant units of service	Tender for services and implement exclusive bus route packages for competitive pricing	Implement contracts and incentivise less reliability on government subsidy for services

9 Other information

In this chapter

Policy on significance

This chapter sets out ORC's policy on significance, which is required to determine whether any proposed variations to the Plan are significant for the purpose of Section 126(4) of the LTMA. The level of significance or a variation affects the level of consultation required before we can officially make any changes to the Plan. The following policies set out how ORC would determine whether a variation to the plan is deemed significant enough to require public consultation.

9.1 Significant variations – requires full public consultation

The following variations are significant and require full public consultation:

- any change to this significance policy
- any change with a more than minor impact on the ORC's ability to
    - achieve its public transport goals
    - achieve the strategic direction and guiding principles of the Plan
    - achieve the objectives of the Plan, or the Regional Land Transport Plan

When assessing the significance of any proposed variation, ORC will consider:

- the reasons for the variation
- consistency with, or effect upon, the overall strategic direction, affordability and integrity of this plan, including how the variation might affect the overall strategic direction, affordability and integrity of the RLTS, the RLTP or ORC's LTP (whether proposed or adopted)
- whether the matter has already been publicly consulted upon by ORC
- those persons likely to be affected by the variation
- options available to ORC, their costs and benefits.

9.2 Non-significant variations – without full public consultation

The following changes are not deemed significant and thus do not require full public consultation. They may instead involve targeted community consultation:

- **Service reviews**
  As a service review may only affect a small portion of the region, or a city, full consultation is not required. Key stakeholders may be included in discussions and targeted public engagement is likely when preferred options are available.
- **Minor changes in delivery of services**
  Minor changes in delivery of services to improve efficiency have only a local impact. In these cases, any engagement will be targeted to the affected community, and with operators and district/city councils involved.

- **Trial services**
  Implementing bus services as a trial service may only affect a small portion of users. Targetted public engagement is suitable for this purpose.
- **Other variations**
  Any proposals for changes that affect a small sector of the community or the industry (i.e. Total Mobility or a vehicle quality standard) may be worked through with those most likely to be affected and relevant stakeholders.

This policy does not prevent ORC from undertaking more comprehensive consultation for any variation to this Plan.

Review of the Plan

The LTMA requires ORC to ensure that the Plan is kept current for a period of not less that three years in advance, but not more than ten years in advance. The Plan may be reviewed or varied from time to time, but it must be reviewed, and varied if necessary, when the public transport components of the RLTP are approved or varied, or on completion of QLDCs transport strategy review.

Policy 43

Regularly review and update the Plan to take account of changing circumstances.

Policy 44

Ensure appropriate public consultation on future Plan variations.

Provision of information

This section sets out the information ORC is likely to request from operators of public transport units in Otago. The information we seek assists with public transport planning, contracting, monitoring, and benchmarking services. It also assists the NZTA develop a national overview of public transport. This provision does not enable ORC to require information from operators of exempt services, but it does not prevent us requesting it. These provisions for information are in accordance with section 127 of the LTMA.

ORC can require operators of units under PTOM to provide for each unit:

- Patronage data
- Revenue data

Once requested, ORC must publish the patronage data, and data indicating the extent of subsidy on each unit.

Commercially sensitive information

The LTMA restricts the disclosure of fare revenue information provided to ORC about units.

ORC will administer the information held in accordance with the LTMA and the local Government Official Information and meetings Act (1987).

Customer care and quality management of public transport

Implementing the principles of managing quality and customer care, and policies 11 and 12, requires a system for managing customer care and quality across both integrated networks. The table below outlines the approach that ORC will take to enhance the quality of the integrated networks. ORC's LTP provides for funding of this work, all of it being 'business as usual'. **Table 9.1**, below, describes methods of implementation.

Table 9.1 Definitions and data requirements

Component of quality management	ORC's approach
Define and communicate quality standards – inform customers about the level of service they can expect	• Performance and quality standards are included in this Plan, covering both contract and commercial services, and published on ORC's website and in timetable booklet. • During the period of each contract (before any retendering), ORC reviews all bus timetables with operators to ensure each is achievable operationally.
Provide, and be publicly accountable for, matters needed for services to operate: adequate road layout, bus stop space, layout and shelter, and acceptable traffic conditions	• ORC will work with DCC and QLDC to provide these matters. • When road conditions affect the punctuality of bus timetables, ORC will request DCC and QLDC to undertake and report on measures taken to rectify the situation. • ORC will work with DCC and QLDC to improve the notification period for road closures and to ensure bus users have adequate information about temporary bus stops.
Operate bus services in a way that meets target level of quality in the most efficient way	• Future contracts with operators may specify penalties for failing to meet standards (unless unavoidable), and may also provide incentives for delivering target standards
Monitor achievement of performance and quality standards	• ORC will monitor punctuality and reliability of trips through the electronic ticketing system
Handle complaints with appropriate responses designed to retain customers	• ORC will take customers' complaints seriously, expect operators to do the same and ensure customers receive responses to all issues raised. • ORC will work with operators to set common standards for form of response and response time.

Appendix 1

Assessment of the transport disadvantaged

Section 5 of the Land Transport Management Act contains the following definition of the transport-disadvantaged:'people whom (ORC) has reasonable grounds to believe are the least able to travel to basic community activities and services (for example, work, education, healthcare, welfare, and shopping'

This assessment outlines the legal obligations of ORC for consideration of the transport disadvantaged. According to the Act, we must consider the needs of persons who are transport disadvantaged, and the Plan must detail how the network of public transport services, and any taxi or shuttle services for which ORC will provide financial assistance, will assist the transport disadvantaged.

We used the definition of transport-disadvantaged to identify people, or groups of people, within Otago who are likely to be transport-disadvantaged. Then, we consulted with various groups who support those we consider may be transport-disadvantaged and sought their opinions. We wanted to know:

1. which access is most important to the various groups
2. how their access is disadvantaged
3. how well the current system provides for their needs, and
4. gaps in public services that we can address, or that need investigation.

To determine with whom we should consult to develop our assessment, we explored elements that prevent people from accessing transport. These elements are:

- age
- income
- physical, sensory or cognitive abilities
- residential location
- access to a private motor vehicle or ability to drive.

To determine the needs of those who are transport disadvantaged, we held two workshops to answer the four key questions. The workshop opened discussions with support groups relating to people who may be transport-disadvantaged and enabled us to determine (broadly) the needs of transport-disadvantaged people in Otago.

We developed this assessment in consultation with the following organisations:

- Disability Information Service
- Disabled Persons Assembly
- Royal New Zealand Foundation of the Blind
- IDEA Services
- Otago Polytechnic and University Students Associations
- Bus Go Dunedin - Bus Users Support Group Otepoti Dunedin
- Youth Action
- Visual Impairment Charitable Trust Aotearoa
- People First
- DCC
- NZTA.

Because someone relates to a group that we identify as supporting those who are transport-disadvantaged, it does not mean that everyone connected with that group is disadvantaged; nor does it suggest that people outside these groups, are not disadvantaged. We have simply identified groups that support people who are likely to fall into this category.

The outcome of the workshops

The first workshop sought to determine broad groups of people who could be transport disadvantaged. As a group, we then explored essential places or services that those people need to access to be able to live like those who are not disadvantaged.

Our collaborative opinion of general groups of people who are more likely to be transport disadvantaged are those who:

- have physical disabilities
- have sensory disabilities
- have cognitive disabilities
- have no driving license
- are elderly 65+
- are children
- are students
- are on a low income
- are a beneficiary
- live in a rural / isolated situation
- are immigrants
- are tourists
- have no vehicle
- are shift workers.

In developing this list, we assumed that people only belong to one group, but in reality, many people will be in several groups (e.g. a student, on a low income with a physical disability and no access to a vehicle or driving license). People who belong to more than one of these groups are potentially more disadvantaged than people who do not.

For many people who are transport disadvantaged, accessing places they need to go is extremely important; without access, they become socially excluded

and unable to obtain/partake in essential life functions such as employment, education, health services, shopping and support services. All parties involved in the workshop agreed that having good access to health services is the most important form of access for everyone.

Access to employment, education, support services, shops, religious activities, social activities, sporting and recreational events are those that are more flexible and have more alternatives such as online shopping, working from home, car-pooling and relying on friends and family. Being able to access health care facilities when needed is critical for personal welfare.

The second workshop set to explore how well Otago's current public transport services provide for people in those transport-disadvantaged groups. This enables us to identify gaps in the system to which we may need to attend. We chose some specific types of services and set out to determine the current general opinion on how well we provide services for each group.

Of the services provided by public transport, school-bus services and Total Mobility, access to public buses and information about them received the worst ratings. Complexity of routes with many variations and timetables that are difficult to understand and remember are just some of the barriers faced for the Dunedin network specifically. These aspects are also applicable to many who are not transport disadvantaged in any way. The agencies look upon the Total Mobility service favourably, but seek more financial assistance for those users who are entirely dependent on the service.

Discussions in the workshop also explored the good and valuable aspects of the current passenger transport networks in Otago. Here is a list of the items considered good and valuable in Otago:

- general services
- that public transport services exist
- the aspirations and ideals they seek to achieve are good
- there is a good variety of companies giving a good range of services with competitive pricing
- taxis arrive on time, more often than not, compared with other cities
- health shuttles essential
- bus services
- SuperGold Free travel
- GoCard Extra concessions
- student concessions
- recent consultation and engagement from ORC and DCC
- bus shelters with seating and wheel chair spaces
- reliable public transport (in general bus services are on time)
- bike racks on buses
- kneeling/wheelchair accessible buses (in Dunedin)
- specific working party group for timetable booklet development
- call centre service good, during working hours
- complaints process much improved at ORC
- GoCard and top ups on buses improves access
- bus drivers in general are supportive and considerate for most patrons

Publicly funded transport assistance for the transport-disadvantaged

There is a variety of publicly funded assistance available to the transport disadvantaged in Otago to help them meet their transport needs. These services and forms of assistance are aimed at improving the affordability of services and ensuring those with disabilities can use either public transport or taxis; they are funded by either ORC or by the Government.

Delivery of government assistance for the transport disadvantaged is fragmented among different agencies, and entitlements have been added over time for different types of mobility impairment and disability, with no overall consistency.

There is a possibility that the Government may rationalise how it delivers assistance to the transport disadvantaged. Should the number of transport disadvantaged increase and should fiscal costs need to be contained, future governments might choose to ration the assistance available to individuals. These matters are beyond the scope of this Plan.

Appendix 2

Matters to take into account in the Plan preparation

Section 124 of the Land Transport Management Act states that ORC must take into account the following matters when preparing the Plan. Table A2.1 lists those matters and explains how we have addressed them.

Table A2.1. Legislative matters we address in the Plan.

Matters we must address	How we have addressed them
How the Plan contributes to the purpose of the Act	The Plan introduces a new bus network for Dunedin and a new contracting model for bus contracts. It enables the public to comment on the proposed new network structure and fares These elements contribute to Otago having an effective, efficient and safe land transport system that operates in the public interest.
Preparation of the Plan in accordance with NZTA guidelines?	NZTA's guidelines were used to develop the Plan.
Applied the principles of section 115A(1) of the Act	ORC has applied the principles of section 115(1) as the principles we seek for the region.
Takes into account any national energy efficiency and conservation strategy	Table 2.2 shows how the strategy is relevant to the Plan.
Takes into account any relevant regional policy statement, regional plan, district plan	Table 2.2 shows how the policy statement, regional strategy and district plans are relevant to the Plan.
Takes into account the public transport funding likely to be available in the region	We discuss the funding likely to be available in chapter 2.
Takes into account the need to obtain best value for money, having regard to the desirability of encouraging a competitive and efficient market for public transport services	We discuss these matters throughout the entire Plan as they relate to the development of units and the use of financial incentive mechanisms.
The views of public transport operators in the region	Our operators are involved in the development of the units for PTOM and the transition process. We also collaborated closely with our operators on the design of the new Dunedin network and in the review of the fare structure.
Considers the needs of persons who are transport disadvantaged	We held several workshops with representatives of transport-disadvantaged groups. The results of these workshops are in Appendix 2.

Section 120 of the Act states the mandatory contents of the Plan. In Table A2.2 below, we list each required item, and note whether that content is included in the Plan.

Table A2.2. Legislative matters we address in the Plan.

Items we must include	Are they included?	Where in the Plan are they?
Identify the public transport services integral to the public transport network that the rORC proposes to provide	Yes	Chapters 5 and 6 of the Plan
Provide an outline of the routes, frequency, and hours of operation of the services that are integral to the network	Yes	Current routes are in Appendix 5, new routes are in Chapter 5.
Arrange all of the public transport services into units	Yes	These Units are tabled in Chapter 7 with maps in Appendix 6.
Indicate the date each unit commences	Yes	Chapter 7
Indicate the date by which any exempt services, to be replaced by a unit, are to be deregistered	Yes	Chapter 7.4
Identify units for which ORC intends to provide financial assistance	Yes	Chapter 7.2
Identify any taxi or shuttle services for which ORC intends to provide financial assistance	Yes	Chapter 7.3
Describe how the network will assist the transport disadvantaged	Yes	Chapter 3 and Appendix 2
Specify any objectives and policies that apply to any unit, and any taxi or shuttles services for which ORC provides financial assistance	Yes	Chapter 7
May describe exempt services, but may not make them subject to the objectives and policies applying to units	Yes	Chapter 7.4
May describe other matters ORC deems relevant	Yes	Chapter 8

Items we must include	Are they included?	Where in the Plan are they?
For units, ORC must include policies on: accessibility, quality and performance • fares and the method or formula or other basis for setting and reviewing those fares • the process for establishing units • the approach that will be taken to procuring the delivery of the services in a unit • how the procurement of services will be phased in over time • managing, monitoring, and evaluating the performance of units	Yes	Chapter 7
Any procurement of units that ORC does not intend to provide financial assistance for must be approved by NZTA	Yes	Wakatipu Basin. We will seek approval through our procurement strategy.
Must contain a policy on significance for reviews	Yes	Chapter 8

Appendix 3

Roles and responsibilities

ORC's roles and responsibilities are to:

- register exempt services and maintain a public register of those public-transport services approved to operate in Otago
- prepare, deliver and monitor the implementation of this regional public-transport plan
- manage the integrated networks, including integrated ticketing system, fare structure and timetable information
- procure (contract) and fund public-transport services integral to the defined networks; form performance-based contracts with bus operators
- with local authorities, plan the location of bus stops and shelters for the integrated networks (and other contracted routes); fund bus stop and shelter installation
- coordinate timetable information for the integrated networks and make the information publicly available when there is more than one operator
- administer the Total Mobility Scheme in Otago, which provides subsidies for the use of taxis and taxi vans by those unable to use scheduled services due to disability.

The roles and responsibilities of the territorial local authorities (and NZTA on state highways) are to:

- manage and allocate the public space used by public transport
- procure, own and maintain footpaths, traffic control devices, including road markings, signage
- work with ORC, plan the location of bus stops; install and mark bus stops and termini.

The roles and responsibilities of transport operators' roles are to:

- operate public transport services; maintain passenger transport vehicles
- promote the use of public transport services.

The roles and responsibilities of NZTA are to:

- develop and provide operational policy advice to Government; advocate, assist and advise local government to try and ensure the latter's policies and plans align with government policy and expectations
- invest in public transport, and seek value for money: part-funding services, infrastructure and timetable information and set standards (e.g. for buses) to be met by local government
- monitor performance of public transport networks nationally
- regulate and licence buses and rail operation; issue passenger service licences
- manage the state highway network.
- to approve procurement procedures for crown subsidised services and facilities

The roles and responsibilities of the Ministry of Transport are to:

- provide policy advice and support to ministers on passenger transport
- help the Government give effect to its policy by supporting the development of legislation, regulations and rules.

The roles and responsibilities of the Ministry of Social Development are to:

- fund the SuperGold Card concession of free off-peak travel on public transport.

The roles and responsibilities of the Ministry of Education are to:

- provide transport assistance to eligible schools and school children
- administer the Ministry-funded school transport network.

Appendix 4

Schedule of current services (post 1 August 2014)

The following schedule lists services provided by the ORC. These services will continue until replaced by services within the new unit contracts.

The services we outline in **Table A4.1**, operate between 6am – midnight every day except Good Friday and Christmas Day.

Table A4.1. Routes and frequencies in the Dunedin integrated public transport network (including Northern services)

Route description	Peak frequency
Northern service (and return) – Dunedin, Waitati, Karitane, Waikouaiti and Palmerston	Irregular
Ross Creek to Ocean Grove and return	30 minutes
Pine Hill to Lookout Point and return; includes variations via: • Liberton • Dalmore • Liberton and Dalmore • South Dunedin	20 minutes
Pine Hill/Opoho evenings and weekends loop	60 minutes
Normanby to St Clair and return; includes variations via: • Macandrew Road	15 minutes
Normanby to St Clair Sundays and public holidays	60 minutes
Opoho to Shiel Hill and return	20 minutes

Port Chalmers to City and return; includes variations via: • George Street • Castle Street • Careys Bay • Sawyers Bay (Saturdays) • Totara Street • Ravensbourne hill streets	Irregular
Portobello to City and return; includes extensions and variations via: • Harwood • Harington Point • Marion Street	Irregular
Waverley to City and return	Irregular
Shiel Hill to City; includes variations via: • South Dunedin	20 minutes
• St Kilda to Halfway Bush and Brockville and return; includes variations via: • Bay View Road • Macandrew Road • Prince Albert Road • Bradford • Ashmore Street	20 minutes/ 40 minutes
St Kilda/Shiel Hill evenings and weekends loop; includes variation via: • Waverley	60 minutes
Corstorphine to City and return; includes variations via: • St Clair Park and Middleton Road and return • Corstorphine Road and Caversham • Middleton Road and Hillside Road	30 minutes
Corstorphine/Lookout Point evenings/weekends	60 minutes
Concord/Kaikorai/University and return	30 minutes
Wakari/Helensburgh to City and return	Irregular
Wakari/Helensburgh/Gardens/University Evenings/Weekends/Public Holidays	60 minutes

Bradford/Belleknowes/City Rise/University and return	30 minutes
Kenmure to University and return	30 minutes
Balaclava to University	20 minutes
Balaclava/Kenmure evenings/weekends loop	60 minutes
Roslyn/Maori Hill/Prospect Park/University/Octagon and return; includes a variation that does not extend to Prospect Park	30 minutes
Brighton to City and return; includes variations via: • Green Island • Ceasing at Green Island • Abbotsford • Stevenson Road	Irregular
Abbotsford-Green Island to City and return	Irregular
Green Island to City and return	Irregular
Mosgiel to City and return; includes variations: • from Centre Street • from Wingatui via Reid Avenue • Green Island • from Tyne Street to the Gordon Road railway • from Doon Street • Abbotsford • Fairfield • State Highway 1 • Express service to Mosgiel	Irregular
Mosgiel loop - East and West circuits	20 minutes

Table 4.2. Schedule of current contracted school bus services (after 1 August 2014)

Service description	Time period
Pine Hill to Logan Park High School	Morning
Port Chalmers to Logan Park High School	Morning
Dunedin North Intermediate to Pine Hill	Afternoon
Kings and Queens High School, Tahuna Intermediate, and Bayfield High School to Waverley	Afternoon
Logan Park High School to Pine Hill	Afternoon
Logan Park High School to Roslyn/Maori Hill	Afternoon
Logan Park High School to Wakari/Helensburgh	Afternoon
Macandrew Intermediate, and Kings and Queens High School to Lookout Point	Afternoon

Table 4.2: Bus routes in the Wakatipu Basin public transport network (at the time the Plan was prepared)

Route description	Peak frequency
Remarkables Park/airport to Frankton / to Queenstown (and return)	15 minutes
Frankton to Arrowtown (including Glenda Drive and Quail Rise) (and return)	Irregular
Frankton to Lake Hayes Estate / Shotover Country (and return)	Irregular
Frankton to Lake Hayes / Shotover Country	Irregular
Queenstown to Fernhill and Sunshine Bay (and return)	Irregular
Frankton to Kelvin Heights (and return)	Irregular
Queenstown to Arthurs Point to Arrowtown (and return)	Irregular

Appendix 5

PTOM units

This Appendix contains the route maps of each PTOM unit in the Otago region.

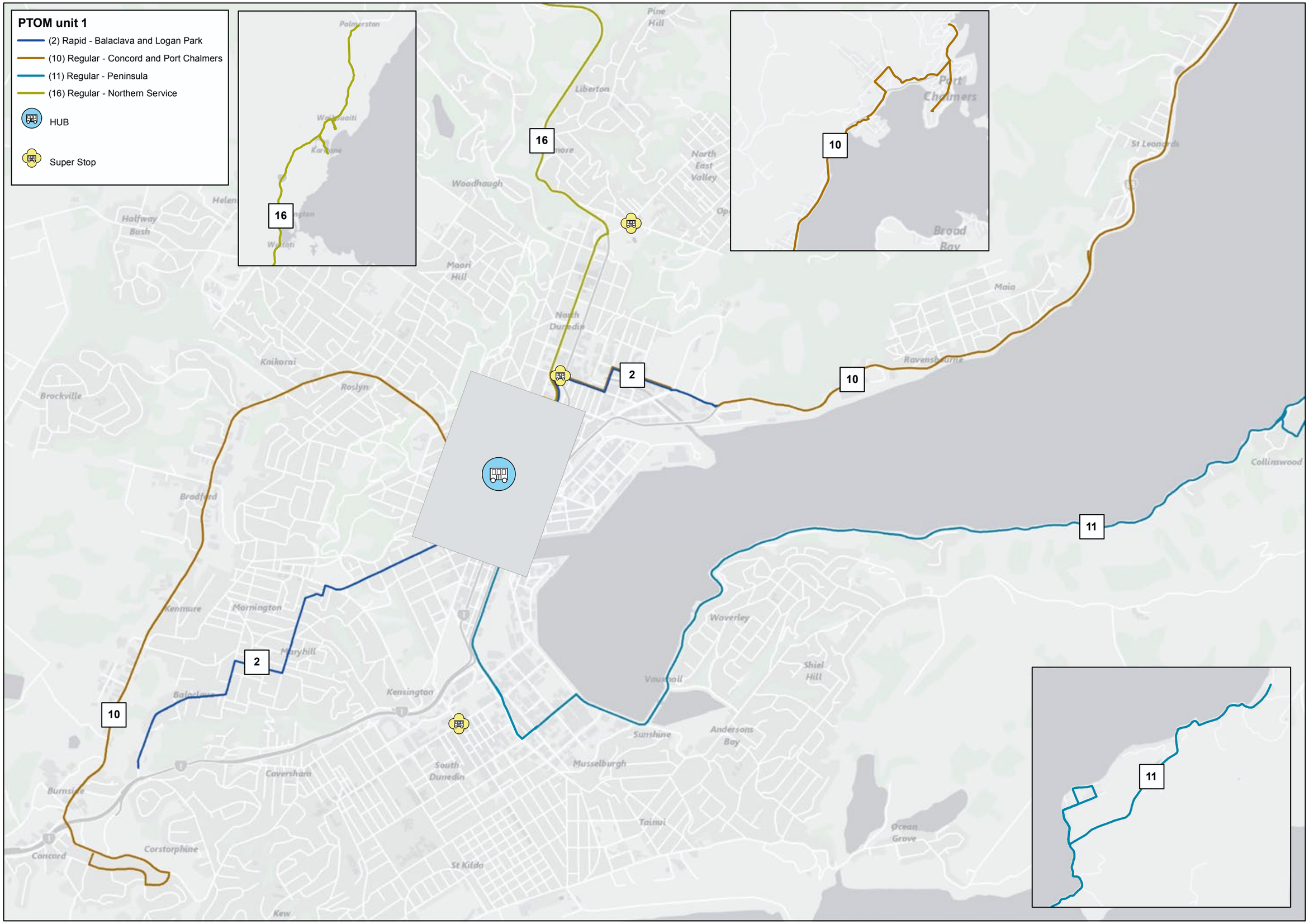


Figure 13. Dunedin - unit 1

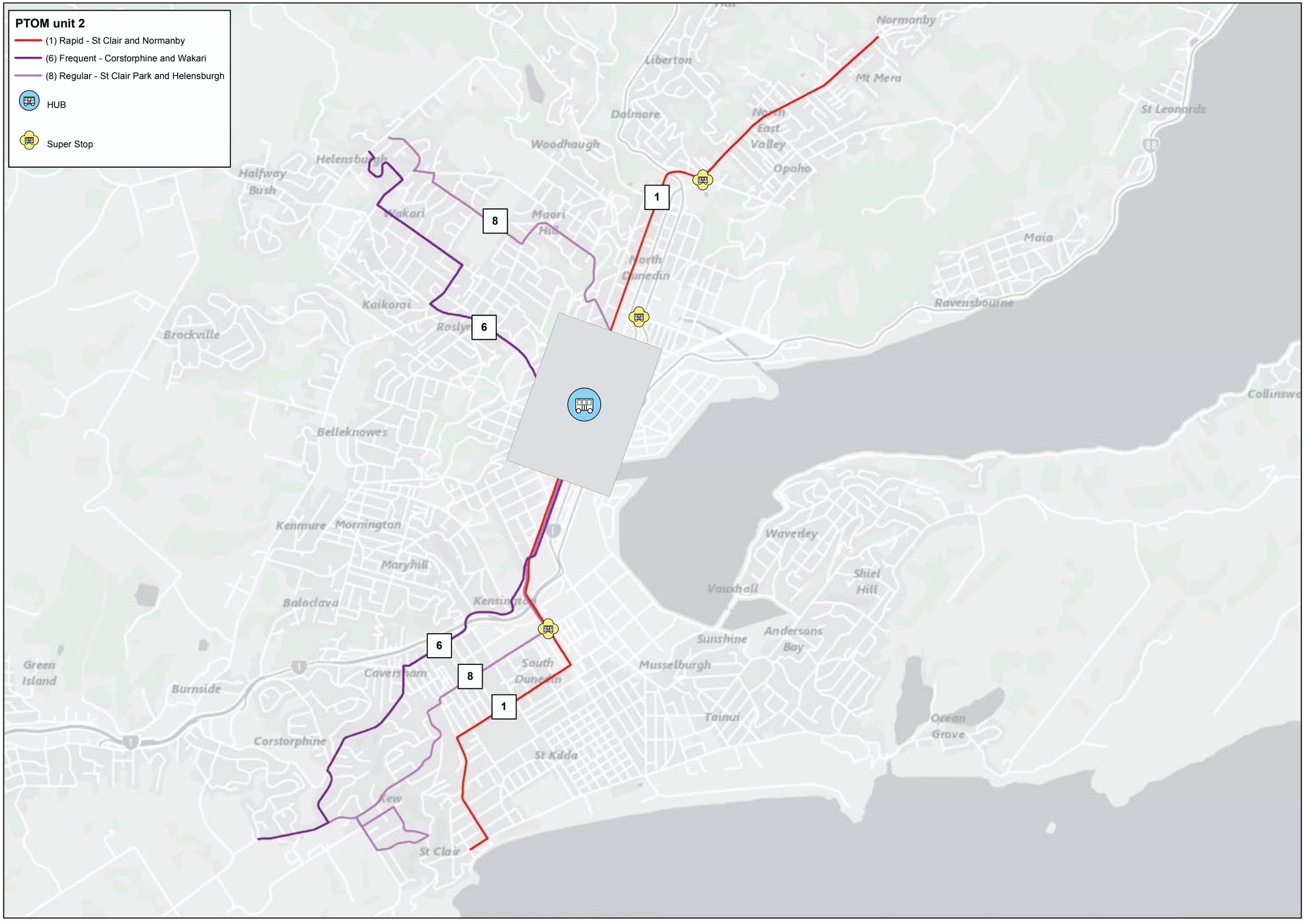


Figure 14. Dunedin unit 2

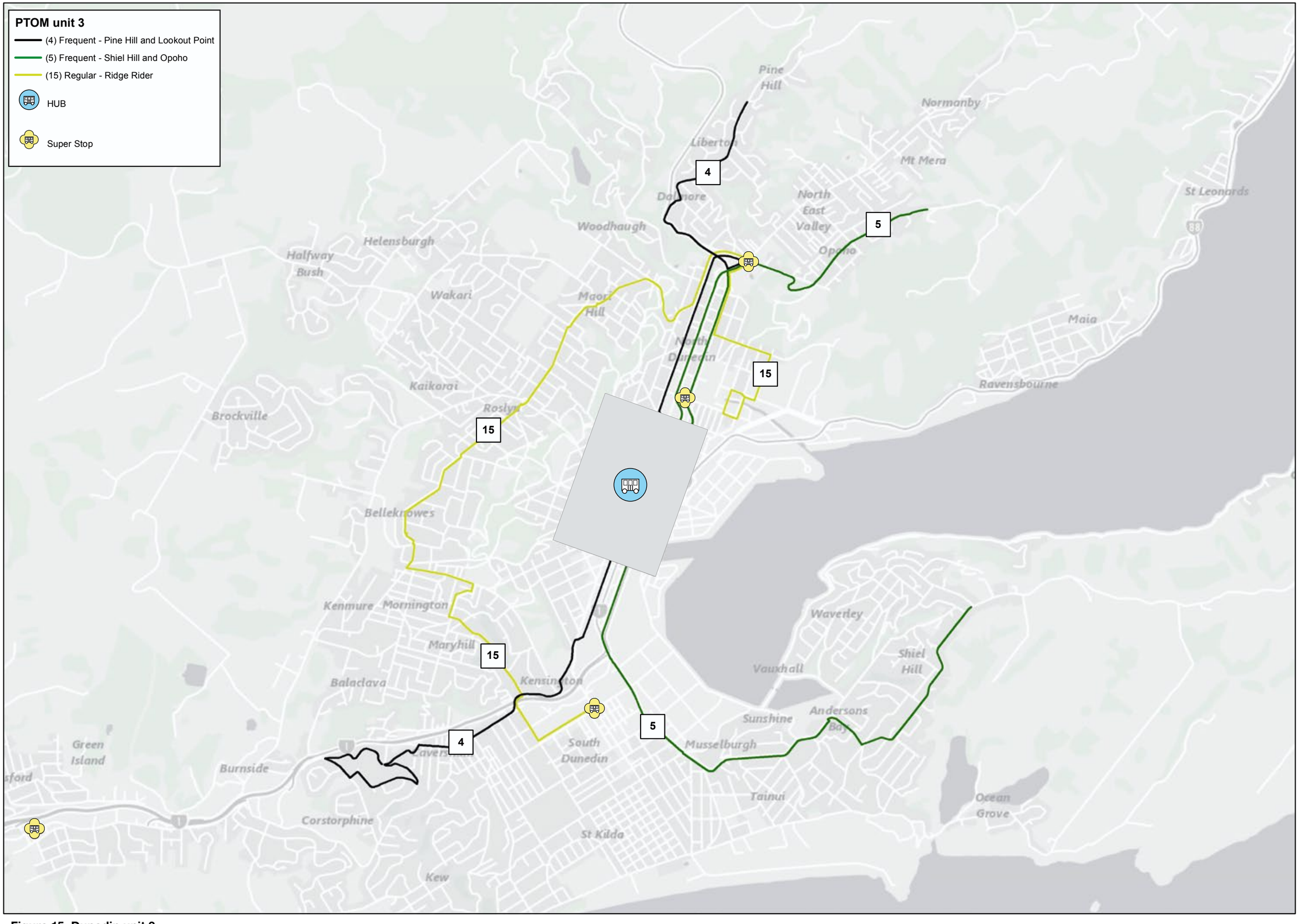


Figure 15. Dunedin unit 3

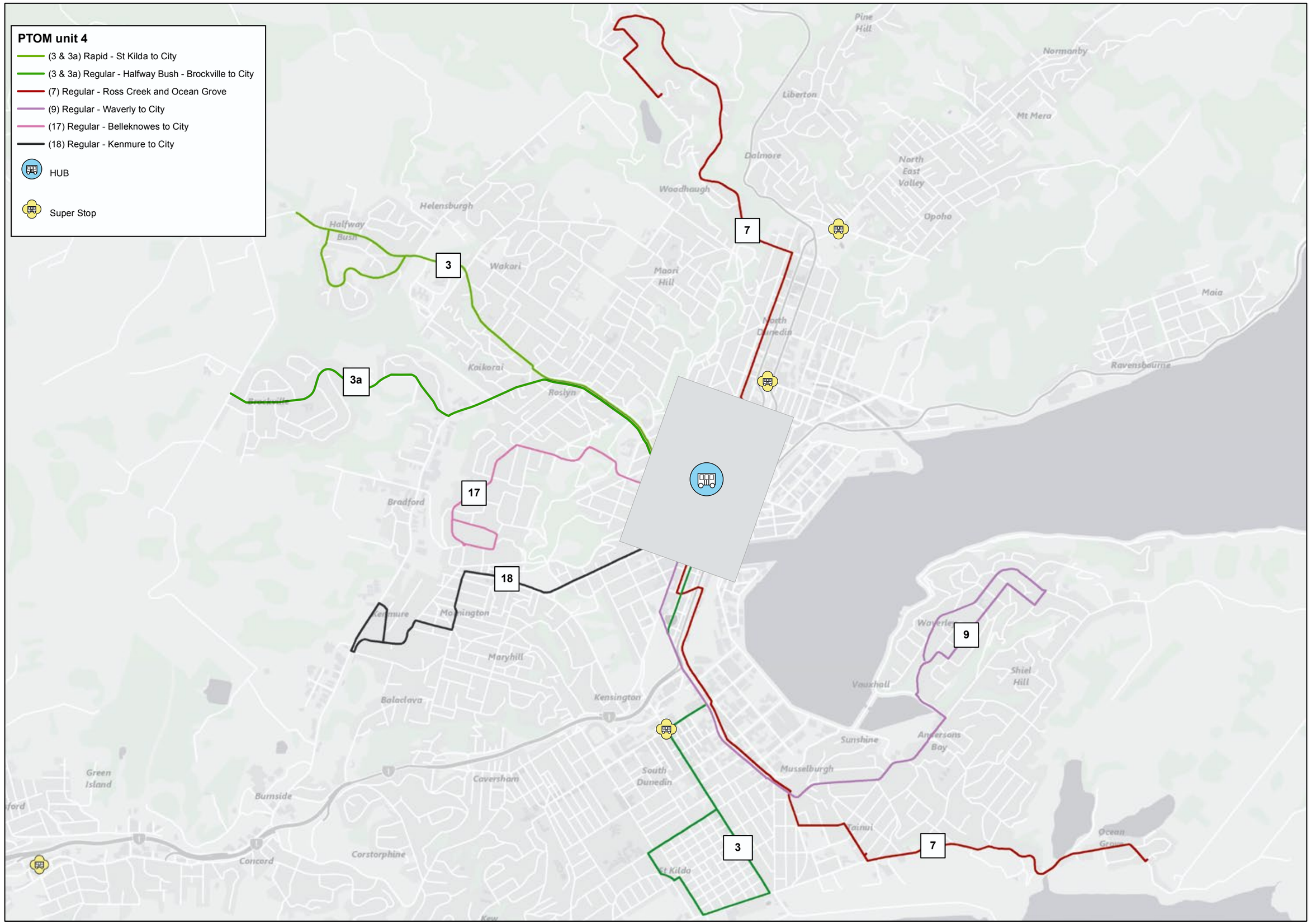


Figure 16. Dunedin unit 4

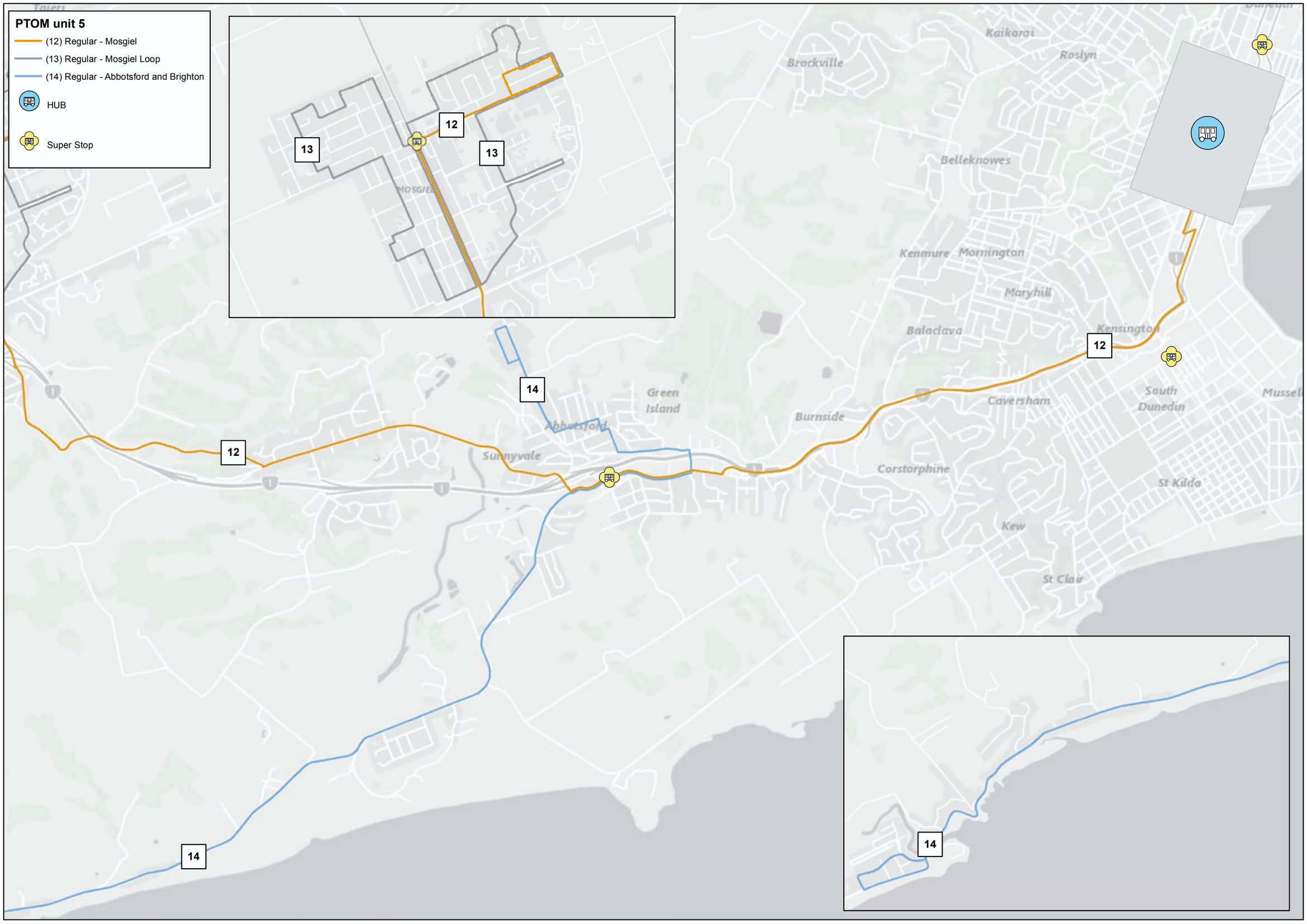


Figure 17. Dunedin unit 5

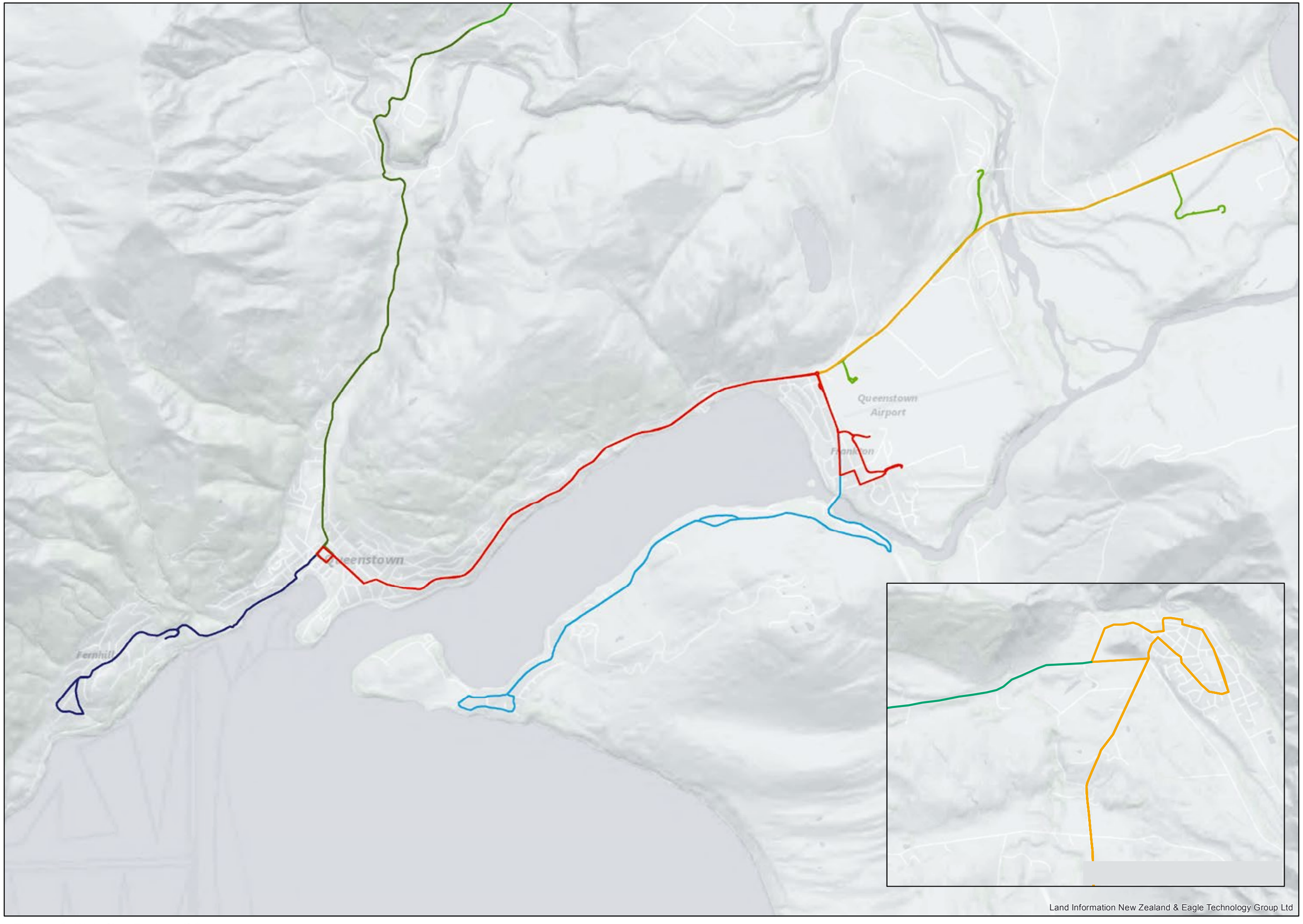


Figure 18. Wakatipu Basin unit 6

Appendix 6

Targets and indicators of success

ORC will monitor the following indicators and targets to measure progress in achieving the goals and objectives of the Plan. These come from the 2011 Strategy.

Table A6.1: Targets and indicators for tracking progress in reaching the objectives of the Plan and the Strategy

Target/indicator	Source of data
Target: Steady increase in the number of trips being made on public transport in each of the integrated networks and region-wide	Otago-wide: Patronage data requested from all commercially registered public transport services
	Dunedin and Wakatipu Basin: ORC monitoring, through electronic ticketing system
Target: Steady increase in the proportion of bus users that are frequent users	Dunedin: Two-yearly quality of life survey (DCC)
	Wakatipu Basin: Start Undertake an annual users survey
Public satisfaction with the standard of service in each integrated network	Dunedin: ORC's annual users' survey, for all residents. Potential for inclusion into DCC resident's survey
	Wakatipu Basin: Start Undertake an annual users survey
Fleet profile (based on age of bus)	ORC data
Proportion of super low floor vehicles in the public transport network	ORC data
Indicator of reduced emissions from buses	ORC data on fleet profile, plus data obtained from bus operators on engine types in the bus fleet
Public transport access services: Target is a basic level of service (at least one day a week) linking all communities on Otago arterial roads with shopping, medical and recreational facilities	ORC data
Relative cost of running a car versus taking a bus	AA data for cars; ORC data for bus fares-by- fare zone for specified origins/destinations
Target: Retention of the school bus network funded by Ministry of Education to service rural areas	Ministry of Education data

Glossary

Exempt service	A public transport service that is exempt under Section 130(2) of the Act or deemed exempt under section 153(2) of the Act. Exempt services are not provided under contract to ORC and, unless specified otherwise, are not subject to the policies in this Plan.
Farebox recovery	A policy that provides for public transport operating costs to be shared equitably between users and funders, to reflect the private and public benefits received, having regard to the objectives and circumstances of the region.
Farebox recovery ratio	The proportion of the total operating costs recovered from users through fares and SuperGold car payments.
Government Policy Statement	A document that highlights the Government's outcomes and priorities for the land transport sector, and sets out irs broad transport funding allocations over the next decade.
Land Transport Management Act	Land Transport Management Act 2003, including the 2008 and 2013 amedments.
National Energy Efficiency and Conservation Strategy	A strategy to promote energy efficiency, energy conservation and renewable energy in New Zealand.
Public Transport Operating Model	A framework for building a long-term public-private partnership between regional councils and public transport operators with two overarching objectives: to grow the commerciality of public transport services and create incentives for services to become fully commercial, and to grow confidence that services are prices efficiently and that competitors have access to public transport markets.
Regional Land Transport Plan	A statutory plan that ORC will prepare under the Act, which sets out the region's land transport objectives, policies and measures for at least ten year; includes a statement of priorities and provides a financial forecast of anticipated revenue and expenditure on activities. The plan forms the basis of Otago's request for funding from the National Land Transport Fund. It replaces the 2012-15 Regional Land Transport programme and the 2011 Regional Land Transport Strategy.
Regional Land Transport Strategy	A statutory document that sets regional objectives and policies for the region's transport system from 2011 for a 30-year period. Following the 2013 amendment to the Act, the Strategy will become incorporated into the Regional Land Transport Plan.
Regional Public Transport Plan	A statutory document describing how ORC will give effect to the public transport components of the Strategy. It also specifies the public transport services for the region, and the policies that apply to those services.
Requirements for Urban Buses	New Zealand's common standard for urban bus quality. It sets out the common dimensions and features of an urban bus and is used by ORC in all new bus contracts.
SuperGold card	A national identification card that provides free off-peak travel services to people aged 65 or older.
Total Mobility	A subsidised transport scheme for those with impaired mobility who are unable to use scheduled public transport services.

Unit	As defined in section 5 of the Act, a public transport service, or group of transport services: • that ORC identifies as integral to the region's public transport networks and • that operates, or will operate, on the entire length of one or more routes specified in the Plan • that includes all of the public transport services operating to a timetable that applies to the entire route or routes specified for the unit.

Acronyms

DCC	Dunedin City Council
FAR	Funding Assistance Rate
LTMA	Land Transport Management Agency Act 2003, as amended
NZTA	New Zealand Transport Agency
ORC	Otago Regional Council
QLDC	Queenstown Lakes District Council
RLTP	Regional Land Transport Plan
RLTS	Regional Land Transport Strategy

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Otago Regional Council

The Otago Regional Council Public Transport Plan 2014

Addendum: Wakatipu Basin

MAY 2017

Otago Regional Council
Regional Public Transport Plan Otago 2014
Addendum Wakatipu Basin Public Transport May 2017

Table of Contents

1.0 About This Addendum

The Otago Regional Public Transport Plan 2014 (RPTP) sets out the priorities and needs for public transport services and infrastructure in Otago. When adopting the plan in December 2014 Council signalled a review of the public transport services in the Wakatipu Basin. This review also aligns with the legislative need to put in place a public transport contract/s under NZ Transport Agency's Public Transport Operating Model (PTOM).

The amendments set out in this Addendum address:

- A new network structure for Wakatipu Basin public transport, reflecting the outcomes of the Wakatipu Basin Public Transport Network Review and subsequent feedback from key strategic partners: the Queenstown Lakes District Council (QLDC), the NZ Transport Agency and Queenstown Airport

Table 1: Amendments to the Regional Public Transport Plan

Amendment	Heading	Refer to RPTP
1	Executive Summary	Page 7
2	How we developed the Plan	Pages 13-14
3	Public Transport Funding	Pages 19-20
4	Network Boundary Map	Page 26
5	What recent investments and changes have we made	Page 39
6	What challenges do we face	Pages 41
7	What do we want to achieve	Pages 44
8	Wakatipu Basin Public Transport	Page 67
9	Units for Public Transport Services	Page 71
10	Implementation of Units	Page 72
11	Fares and Ticketing	Page 81
12	Policy 30	Page 83
13	Explanation of the Farebox Recovery Policy	Page 83
14	Wakatipu Basin Indicative Route map	Page 122-123

2.0. A new network structure for Wakatipu Basin public transport

The amendments to the RPTP are structured to show the necessary policy changes and detail for Council to implement a new network structure for Wakatipu Basin public transport that will enable:

- The introduction of a new fare zone structure and a flat fare structure
- A Unit structure that will allow the procurement of the necessary service contracts
- Collaboration with the Ministry of Education to provide a coordinated and shared approach to school services in the Wakatipu basin
- Public transport Services that are responsive to the communities' needs and desires.

2.1. Amendment 1

RPTP Reference: Executive Summary, Page 6- 7

ADDITIONAL CONTENT

In the Wakatipu Basin

Subject to the funding assistance of Council's strategic partners, NZ Transport Agency and QLDC:

10. A new subsidised network of bus routes and frequencies that will form the platform for future network changes and be able to respond to changing community needs will be introduced.

This means:

(a) There will be changes to current bus routes and frequency of services
(b) Services will operate with public subsidy
(c) Services will complement and assist with the future requirements of the wider integrated programme of network improvements being developed with our strategic partners QLDC and NZTA

11. A zonal fare structure will be introduced. The current fare structure will change to a flat fare structure for Go-Card customers and a three-zone fare structure for cash fares.

This means:

(a) Public transport will become more affordable for all passengers as fares across the network will decrease
(b) Frequencies will become regular and some frequencies may change.

12. Council will work collaboratively with the Ministry of Education to enable a coordinated approach to investment in transport services between the two agencies.

This means:

(a) Some school pupils may use the public transport network for their journey to and from school.

(b) A more efficient use of public investment.

13 Council will work collaboratively with the Queenstown Airport Corporation (QAC) to enable a coordinated approach to the delivery of public transport services to and from the airport.

This Means:

(a) Working with QAC to understand, plan for, and manage the impacts of flight scheduling on network services."

2.2. Amendment 2

RPTP Reference: Chapter 1, Page 13 - 14

How we developed the Plan

ADDITIONAL CONTENT

As a result of the 2016/17 Wakatipu Public Transport Network Review, three additional work-streams have been added. The work-streams consist of:

- A full review of the Wakatipu Public Transport Network to enable optimisation of public bus services and implementation of PTOM units
- A full review of the fare structure and fare levels for the Wakatipu Public Transport Network
- The NZTA's Business Case approach process for proposed improvements to the Wakatipu Public Transport Network.

A fourth work stream is being undertaken collectively with our strategic partners to ensure an integrated and collaborative approach to the partners' responses to the fast-changing needs of the wider Wakatipu transport network. This work will result in further changes over the medium to long term. The strategic partners are:

- Otago Regional Council
- Queenstown-Lakes District Council
- New Zealand Transport Agency (NZTA)
- Queenstown Airport Corporation (QAC)

2.3. Amendment 3

RPTP Reference: Chapter 2, Page 19 - 20

Public Transport Funding

ADDITIONAL CONTENT

As a result of a review of the Wakatipu Basin network in 2015/16, a change to the delivery of public transport in the Wakatipu Network is considered necessary. Changes to the network will be carried out in a number of phases, the first of which focuses on the improvements contained within this Plan which prioritise everyday trips made by locals that could contribute to reducing congestion. We will implement the first phase of changes in 2017 by establishing a new base public transport network operating under the PTOM framework. Details of the proposed changes to the network are set out in **chapter 6.1**. The success of these changes relies on QLDC addressing the availability of low cost parking in the Wakatipu Basin which is a direct inhibitor to the increased use of public transport. It has been assumed in the development of this programme that to ensure a strategic alignment a financial contribution towards the provision of Public Transport will be provided by QLDC.

2.4. Amendment 4

RPTP Reference: Chapter 3, Page 26

Replace Map Figure 3 with

New Figure 3 - The outer boundaries of the Wakatipu Basin integrated public transport network

2.5. Amendment 6

RPTP Reference: Chapter 3, Page 38 - 39

Future Investments and changes

ADDITIONAL CONTENT

We have a number of projects under development in the Wakatipu Basin which we have detailed in Chapter 6 of the Plan. In addition, Council is working with its strategic partners to develop an integrated programme of work to meet the medium to long term transport needs of the Wakatipu basin. This is likely to result in the need for further changes to this plan.

2.6. Amendment 7

RPTP Reference: Chapter 3, Page 41-42

ADDITIONAL CONTENT

Table 3.4 Major challenges facing public transport in the Wakatipu Basin

Challenge	Current situation	Proposed response
Mode shift	Public Transport services in the Wakatipu Basin are currently experiencing declining patronage. Significant barriers to travel exist because of complexities in the network, lack of integration with other transport modes and the cost of using the service, as well as an over-supply of relatively cheap short and long-stay car parking and a dominant car culture for both short and long trips.	The new network structure aims to provide a simple consistent network with better frequencies and routes. It will enable people to rely on bus services, improving their understanding of how they can use the bus, and how to work out where it will take them. Improved fares and transfers will make use of the public transport network more affordable.
Integration with land use planning	Poor integration and consideration of public transport services with land use creates barriers to public transport use.	Integrating land use planning with the new network will enable the QLDC to achieve compact centres with good transport networks for all modes of travel.
Meeting diverse travel needs	Travel patterns in the Wakatipu basin are diverse, with many origins to many destinations. The current network struggles to provide services that meet the desired travel needs.	The new network will allow greater ease of transferring buses, thereby creating a network that enables diverse travel patterns. The further work being undertaken with our strategic partners will ensure an alignment of response and investment to community needs.

Farebox recovery	The national farebox recovery target is an aggregated 50%. ORC want to target this level of farebox recovery over the long term to ensure equity between the users and public funding.	It is expected that there will be a drop in farebox recovery in the short term. However, providing our strategic partners implement strategies that are sympathetic to growing patronage on the network, existing trends will be reversed.
Uncompetitive travel times	For most public transport journeys, travel is far slower than private motor vehicle travel, due to congestion on the network, stop-start travel and a network of meandering routes and low travel frequencies.	The new network proposes more direct services on better frequencies as well as better ticketing options. These will all work to reduce boarding times, and the travel time to and from the city. The new network is part of an integrated investment approach addressing wider roading and infrastructure issues in the network caused by rapid growth in population and visitor numbers. Future investment in priority measures will be critical to the long term success of the Wakatipu Public Transport Network
Improving energy efficiency	Public transport offers the potential for more energy-efficient travel by carrying more people in fewer vehicles.	The Plan proposes a network that will supply an increased level of service thereby enabling more users to travel by bus and reduce the volume of fuel used for regular travel.
Social perception	Members of the general public currently have a negative perception of public transport in the Wakatipu Basin, in particular around reliability and the cost to use the service	The Plan will provide residents and visitors in the Wakatipu Basin with a network that is affordable. The other work streams being developed in conjunction with our strategic partners will improve the reliability and accessibility of the service.

2.7. Amendment 8

RPTP Reference: Chapter 4, Page 44

What we want to achieve

REPLACEMENT CONTENT

The Otago Southland Regional Land Transport Plans 2015-21 sets out the strategic context for public passenger transport in Otago

Public passenger transport (scheduled/unscheduled services, taxis, shuttles, private hire)
Delivering on priorities: Users are able to access the network, in a manner that is convenient and affordable to users and funders. The network is reliable and resilient, helps community resilience and provides value for money.

The Plans envisage public passenger transport continuing to play a vital role in supporting community well-being by providing a means for those without cars, and those who choose not to travel by car, to travel longer distances. Public passenger transport will also remain important for those for whom active transport poses a physical challenge. As the regions' population ages, with younger generations being less reliant on the private motor vehicle, and as changes in the price and supply of petroleum oil fuel affect people's ability to travel by private vehicle, the role of public passenger transport (and shared transport) will grow. In busy areas such as SH6A between Queenstown and Frankton, public transport – scheduled bus services – will play an important role in easing the current and projected congestion. Gradually reducing reliance on private motor vehicles will require significant investment over time in public transport services and infrastructure, from both the public and the private sectors.

Public transport networks operate in Dunedin, Invercargill and the Wakatipu Basin. Outside these three areas, existing bus services are largely orientated to the visitor market (both domestic and international), and priced accordingly. The services on arterial routes across/through Otago and Southland are either shuttle services or scheduled inter-regional bus services. Shuttle bus services also support the operation of off-road cycle networks such as the Great Rides in the two regions. The Plans envisage these visitor-oriented services continuing to be an important mode of travel in coming decades. The Plans also envisage steady improvements to the two public transport networks operating in Dunedin and the Wakatipu Basin. These improvements are intended to build patronage while maintaining the viability of these networks. The Plans anticipate shuttle services, taxis and the Ministry of Education-funded school bus network and special education travel assistance continuing to fill the roles they currently play. The public transport network in Invercargill will be operated to meet the basic needs of the community.

Passenger rail for commuting is unlikely to be viable within the term of this plan, but rail could be increasingly used for transport to special events and for visitor excursions.

For any public transport service, whether existing or new, to be viable, the community must be prepared to support it (e.g. through rates, if necessary), and users must be willing to pay a sufficient share of the operating costs.

If public transport is to be viable outside of regions' urban areas, even at the basic level of service currently available between many towns, then it must be supported by land use planning that concentrates housing within walking and cycling distance of the key roading corridors used by buses.

In order for usage of public transport to increase, services need to accessible for those with disabilities and for older people. This requires attention to roading design and layout, bus infrastructure including bus stops, plus a greater proportion of the regions' buses and shuttles being accessible.

2.8. Amendment 9

RPTP Reference: Chapter 6, Page 67

Wakatipu Basin Public Transport

REPLACEMENT CONTENT

Objective of the new network structure in Wakatipu Basin public transport

The objective of improving the Wakatipu Basin public transport network is to provide the core of a public transport network that contributes to addressing congestion issues on key corridors in the Wakatipu Basin as well as meeting the needs of local communities and visitors by providing;

- Affordable and direct services connecting key destinations, that operate at regular frequencies and for sufficient hours to provide a realistic alternative to private car use
- An easy to understand public transport network with a simple fare structure that is attractive to both residents and visitors to the area
- Contribute to the wider objectives of a 20 percent mode[1]share for public transport, walking and cycling in Queenstown.

[1] Set through the Wakatipu Transport Strategy 2007

The principles for the new network structure

Bus routes, frequencies and fares for the Wakatipu Basin will be based on the following key design principles adopted for the Dunedin network design which seek to:

- Eliminate or minimise route variations
- Coordinate timetables to enable easy transferring between services
- Implement a simple route structure
- Use a fare structure and products to encourage patronage and revenue growth by designing them to appeal to market segments with the most potential for growth
- Integrate and connect with other transport modes

Network design principles

- Routes that are direct as possible using common corridors, without unnecessary deviation or variation
- Schedules that provide for easy transfers between services where routes cross or join
- A small number of transfer points, with most transfers happening at a Frankton and Queenstown bus stops that are easy-to-see for both customers and bus drivers
- Is flexible to meet changing demands and is responsive to community needs
- Investigate the feasibility of integrating Water Ferry/Taxi Services into the Public Transport Network for the Wakatipu Basin

Patronage principles

- The network design principles recognise the needs of local communities as well as visitors and ensure a good match between:
    - The route, number and timing of the services
    - Operating hours and the desire to travel (based on minimum loadings)
    - Bus capacity and demand
- The majority of services are concentrated on localities likely to generate the bulk of the demand
- The ability to increase service capacity on a route when needed.

Access and mobility principles

Working with NZTA and QLDC to ensure

- Other transport users such as cyclists, pedestrians and car users have integrated access to the public transport network so that it can form all or part of their journey.
- Optimal spacing of bus stops so walking times to/from stops are reasonable
- Safe access to/from bus stops, particularly for stops with greater demand
- People walk further to take a higher frequency service

Efficiency principles

- Routes designed to provide acceptable travel times (compared to other common transport modes) as the wider Wakatipu Basin transport network evolves with the introduction of bus priority measures and roading infrastructure designed to alleviate congestion
- Priority allocation to buses for key space, particularly at Frankton and Queenstown where interchange between services may occur

- Different peak and off-peak frequencies, if needed, to match capacity and demand
- scheduling that make good use of the bus fleet
- Scheduling that avoids, as far as possible, clustering of buses in common corridors
- A good match between the size of the bus, the topography of the area, and the demand for services
- For new growth areas, transport planning considers all travel options, with services to these areas to be considered only if the stability of the network bus routes is not compromised and where average service loading and farebox recovery are sufficient to ensure service viability

Structure of the proposed public transport network

The ORC propose a changed approach to providing public transport in the Wakatipu Basin, based on a simplified route and timetable structure. The proposed new network structure is the first stage of what we anticipate being a number of structure reviews and amendments to enhance and improve the Wakatipu Basin public transport network over the medium to long term. These further measures are currently being developed with our Strategic Partners.

Stage one focuses on:

- Simplifying the network by reducing route variations
- Reducing fares to a more affordable level
- Working with Ministry of Education to ensure a collaborative and coordinated approach to providing transport for school children

The new network will be flexible and responsive to both future population and visitor growth. It will be a scalable, simple network which will enable future stages of the new network structure to focus on network expansion and greater provision of services targeted at visitors.

The proposed network consists of four routes. These operate predominantly on the same roads as the current routes.

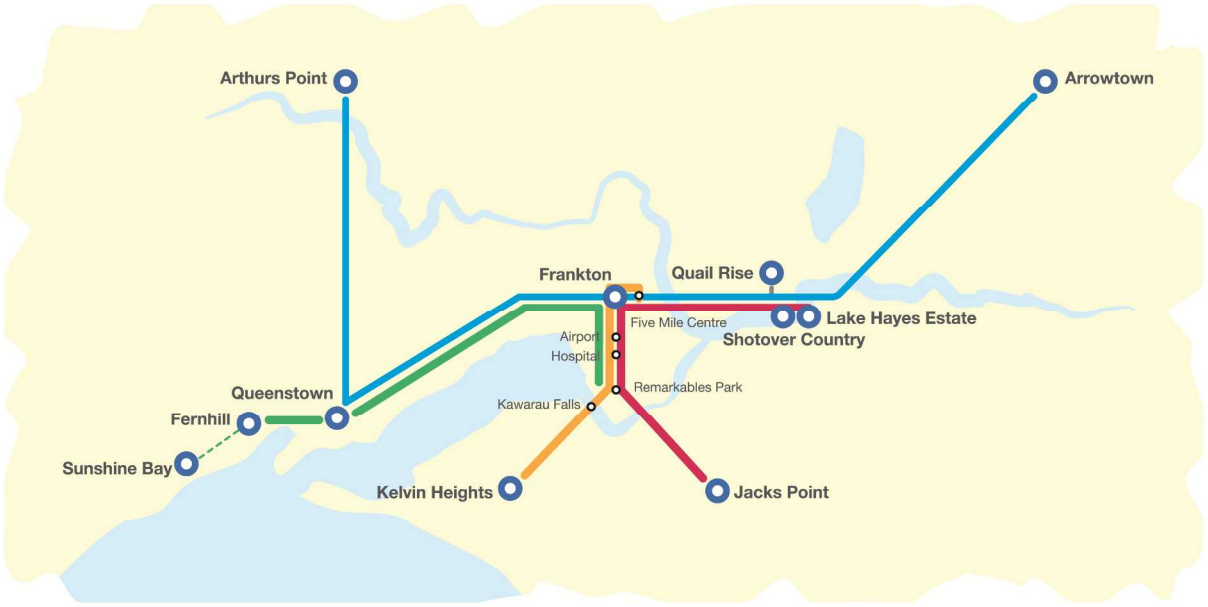
The routes are:

- Arrowtown: Frankton – Queenstown - Arthurs Point
- Sunshine Bay: Fernhill – Queenstown – Airport - Remarkables Park
- Kelvin Heights: Frankton -Five Mile
- Jacks Point: Frankton - Shotover Country - Lake Hayes Estate

Figure 6.1 illustrates the simplified route structure. We anticipate the new network structure to commence within the third quarter of 2017.

A key element of the network is the stability of routes. The new network will use main corridors and will avoid using small residential streets, except where they will form a safe route to turn the bus at the end of a journey, or in denser housing areas.

Figure 6.1 - Stage One Preferred Network (schematic)



The new network will be supported by investment in roading infrastructure, including bus priority measures at key points on the network. Investment in this infrastructure will assist in making the public network visible and will increase its status; it will also increase the reliability of services. Increased investment in the following areas is also key to the new network:

- Encouraging and supporting QLDC to reduce the availability of low cost parking
- Introduction of a new ticketing system
- Journey Planner
- New timetable information including on street and web
- Consistent route displays on the buses (head signs)
- Improved website
- Simplified concessions
- Online top-ups for GoCard
- Bike-racks on all buses

Working with QLDC and NZTA to ensure;

- the installation of bus shelters and seating where appropriate
- Consistent bus stop signage and flags
- Installation of tactile guides from shelters and seating where appropriate
- Ensure all bus stops have pavement access to boarding and alighting areas of the bus
- Other supporting infrastructure as necessary

Services integral to the new network

Table 6.2 details routes, targeted frequencies and intended hours of operation for the proposed new services.

Table 6.2: Proposed routes and frequencies

Route	Description	Initial Hours of Operation between	Desirable hours of operation between	Initial Frequency	Desirable Minimum Frequency	Contract Unit
1	Sunshine Bay (peak only) Fernhill to Queenstown-Frankton Flats-Airport-Remarkables Park-Airport	6am to 12am	6am to 1 am	15 minutes 30 minutes (evening off-peak)	15 Minutes	6
2	Arrowtown-Frankton Flats-Queenstown Town Centre-Arthurs Point	6am to 10pm	6am to 12pm	30 minutes (peak) 60 minutes (off-peak)	30 Minutes	7
3	Five Mile-Frankton Flats-Airport-Remarkables Park-Kelvin Heights	6am to 10pm	6am to 12pm	60 minutes	30 Minutes	7
4	Lake Hayes to Jacks Point	6am to 10pm	6am to 12pm	30 minutes (peak) 60 minutes (off-peak)	30 Minutes	6

Timetables will be coordinated to enable transfer between services in Queenstown and Frankton.

Services will operate at the same frequency irrespective of the day of the week and on all days of the year except for Christmas day. The extent of services, service hours, and service frequency may be extended/changed during special events, occasions such as New Year's eve, and depending on demand

Council will work with the Ministry of Education to enable a coordinated approach in providing access to schools. This may result in children using the public transport network as their primary means of transport.

Fare-zone structure and concessions

We have reviewed the fare structure and fare levels for Wakatipu Basin services. The aim of the fare review is to simplify the Wakatipu Basin fare-zone system and break down barriers to bus usage, including the cost of services.

Due to the fare review and proposed flat fares, it is suggested that only the following concessions will apply in the Wakatipu basin;

- GoCard concession against cash fare
- Child concession
- Super Gold off-peak
- Any other fare concessions and fare products will only be available through the GoCard.

Fares will be defined in Council's Annual Plan process for 2017/18. We propose to implement the final fare products and concessions in line with the introduction of the new network. Table 6.3 reflects the fares to be consulted on through the draft Annual Plan 2017/18.

Table 6.3 - Proposed fare-zone structure

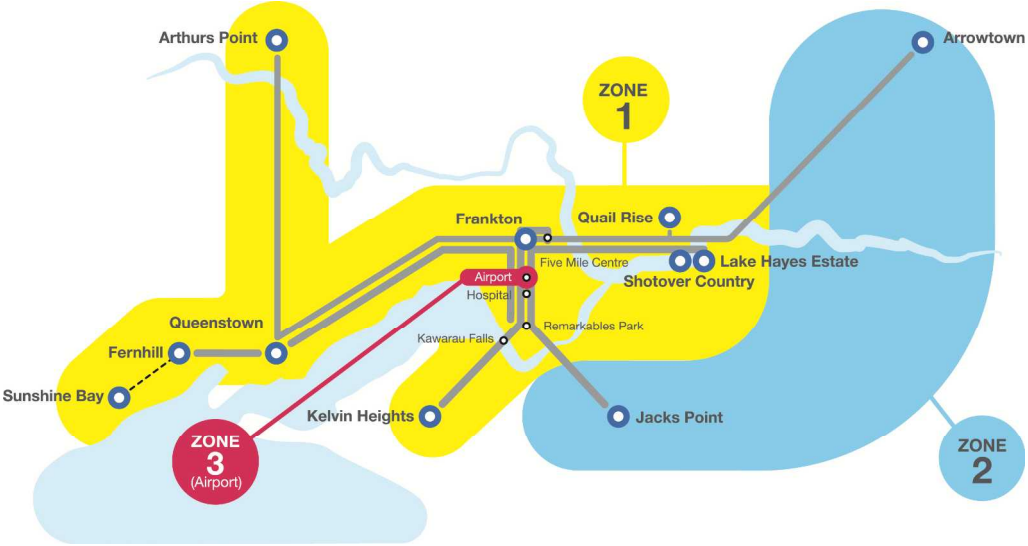
Zone	Cash		Go Card	
	Child	Adult	Child	Adult
Zone 1 and 2	$4.00	$5.00	$1.50	$2.00
Zone 3 (Airport)	$8.00	$10.00	$1.50	$2.00

As with Dunedin, we acknowledge that there is a need to ensure that the public get the best outcome by keeping fares as low as possible, while also taking into account the constraints we face as an agency contracting bus services. The ORC will target a long term farebox recovery level of 50%. It is acknowledged over the short to medium term that this may not be achievable.

Fare-zone structure

The zone structure for the Wakatipu Basin network is provided in Figure 6.4.

Figure 6.4 - Proposed fare-zone structure



The business case approach

To obtain funding from Central Government to assist us in developing the Wakatipu Basin public transport network, we need to adhere to 'business case' process requirements required by the New Zealand Treasury and administered by the NZ Transport Agency. The business case process provides the information required by the NZ Transport Agency to facilitate investment decisions. The 'business case' approach is outlined in more detail on page 63.

A business case is being developed for the proposed improvements identified in the amendment to the plan based on the following investment objectives;

- Increased appeal to businesses and visitors
- Increased customer satisfaction
- Reducing the proportion of trips by car
- Travel time reliability
- Value for money

The business case focuses on the short-term requirements of the community.

The medium to long term investment programme is being developed as part of the wider Queenstown-Integrated Transport Programme Business Case (QITPBC). The QITPBC has developed a long list of potential transport interventions for an integrated transport network. It provides an umbrella approach for bringing together all transport interventions and provides strategic alignment for the strategic transport business cases being developed in the Wakatipu basin by the ORC, NZ Transport Agency and the QLDC. This process ensures investment is focused on a travel demand management approach to responding to traffic congestion in the Wakatipu Basin. The Wakatipu Basin Public Transport Network review is the first step of the wider work programme to transform the Wakatipu Basin public transport and roading network and is being advanced ahead of the completion of the wider programme.

Future projects for better public transport

Future projects for the public transport network are being developed as part of the Queenstown-Integrated Transport Programme Business Case.

2.9. Amendment 9

RPTP Reference: Chapter 7, Page 71

Wakatipu Basin

REPLACEMENT CONTENT

Table 7.6 - Unit 6

Route
Sunshine Bay - Fernhill – Queenstown - Airport - Remarkables Park
Jacks Point - Frankton - Shotover Country - Lake Hayes Estate

Table 7.7 - Unit 7

Route
Arrowtown – Frankton - Queenstown - Arthurs Point
Kelvin Heights - Frankton - Five Mile

2.10. Amendment 10

RPTP Reference: Chapter 7, Page 72

Implementation of units

Common Corridors

ADDITIONAL CONTENT

The following corridors are common for the Wakatipu Basin bus network:

- Shotover Street
- Stanley Street
- Ballarat Street
- Frankton Road/State Highway 6A
- Frankton Ladies Mile Highway
- Kawarau Road/ State Highway 6

2.11. Amendment 11

RPTP Reference: Chapter 7, Page 81

Fares and Ticketing

REPLACEMENT CONTENT

These policies apply to contracted bus services in the Dunedin and Wakatipu Basin networks.
We will implement these policies through:

- Contracts: See standards and provisions for fares/ticketing (business as usual)
- Management of ORC's integrated ticketing system (business as usual)
- ORC seeking a common fare structure in each network
- ORC promoting GoCard as its preferred method of collecting fares, through considering:
    (a) New fare products able to be introduced under a new ticketing system
    (b) A more appropriate fare zone structure for the Dunedin and Wakatipu Basin networks
    (c) An integrated fare system in Dunedin and the Wakatipu Basin with apportionment of fares between Units

2.12. Amendment 12

RPTP Reference: Chapter 7, Page 83

Policy 30

REPLACEMENT CONTENT

Fare levels will be set through the ORC's Annual Plan process.

2.13. Amendment 13

RPTP Reference: Chapter 7, Page 83, first paragraph

Explanation of the fare-box recovery policy (29 (d))

REPLACEMENT CONTENT

Bus services in the two integrated networks are funded by a combination of bus fares and public subsidy split between rates and the National Land Transport Fund (the latter funded by road users).

2.14. Amendment 14

RPTP Reference: Appendix 5, Figure 18

REPLACEMENT MAP

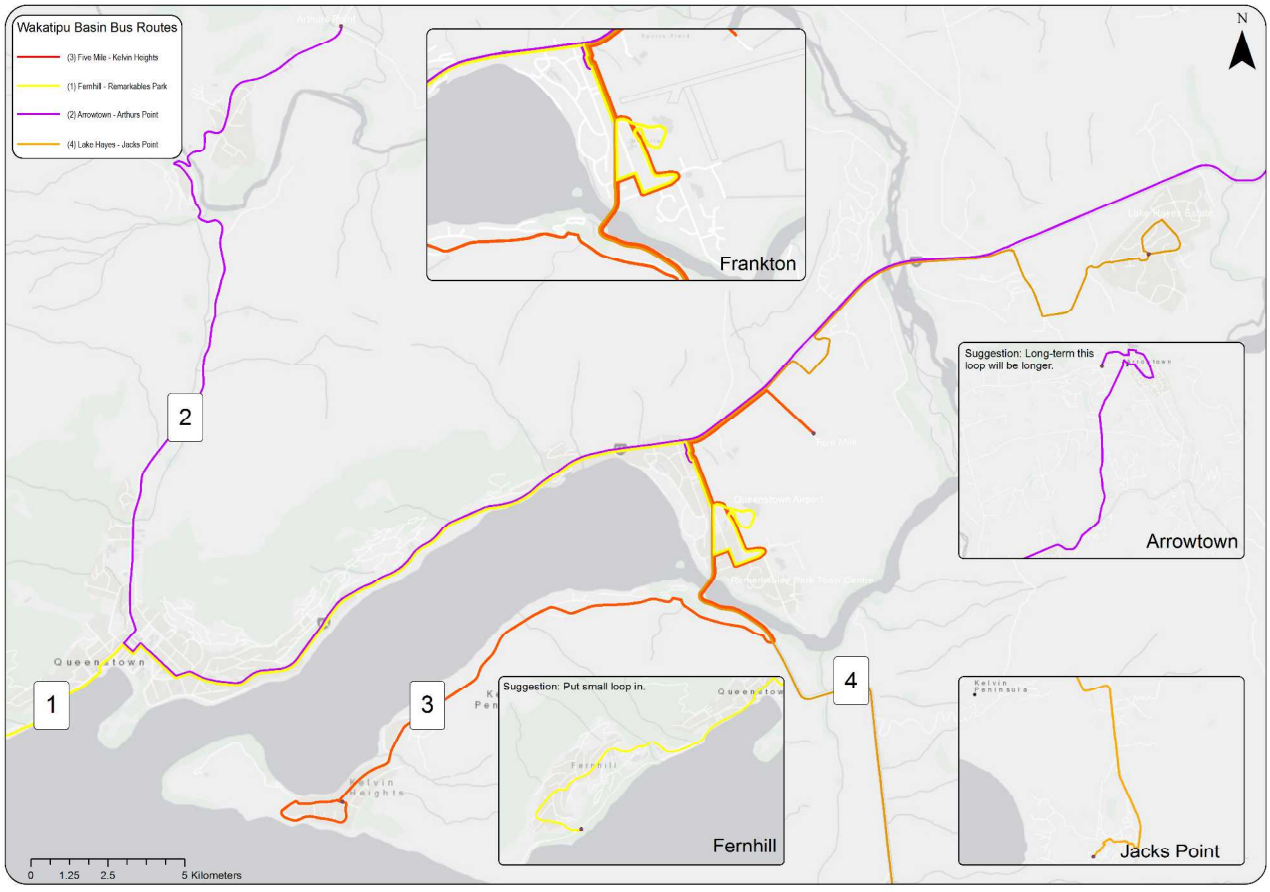


Figure 18 - Wakatipu Basin Indicative Route Map (note indicative only subject to detailed network design)

3.0 Conclusion

The amendments as outlined in this addendum will enable a new public transport network and service structure for the Wakatipu Basin.

The amendments will target the communities immediately impacted by the changes proposed in this addendum. The changes outlined in this addendum for the Wakatipu Basin will require funding approval to be obtained from the NZ Transport Agency and the Otago Regional Council and the Queenstown-Lakes District Council Annual Plans 2017/18.

Otago Regional Council

The Otago Regional Council Public Transport Plan 2014

Addendum: Concord - Green Island Community Link

JUNE 2017

Table of Contents

1.0 About This Addendum

The Otago Regional Public Transport Plan 2014 (RPTP) sets out the priorities and needs for public transport services and infrastructure in Otago.

The amendments set out in this Addendum address:

- An extension of Unit 5 Southern Route services to reinstate the community link between Concord and Green Island.

Table 1: Amendments to the Regional Public Transport Plan

Amendment	Heading	Refer to RPTP
1	Unit 5 Route Map	Page 120 - 121

2.0 An extension of Unit 5 Southern Route Services

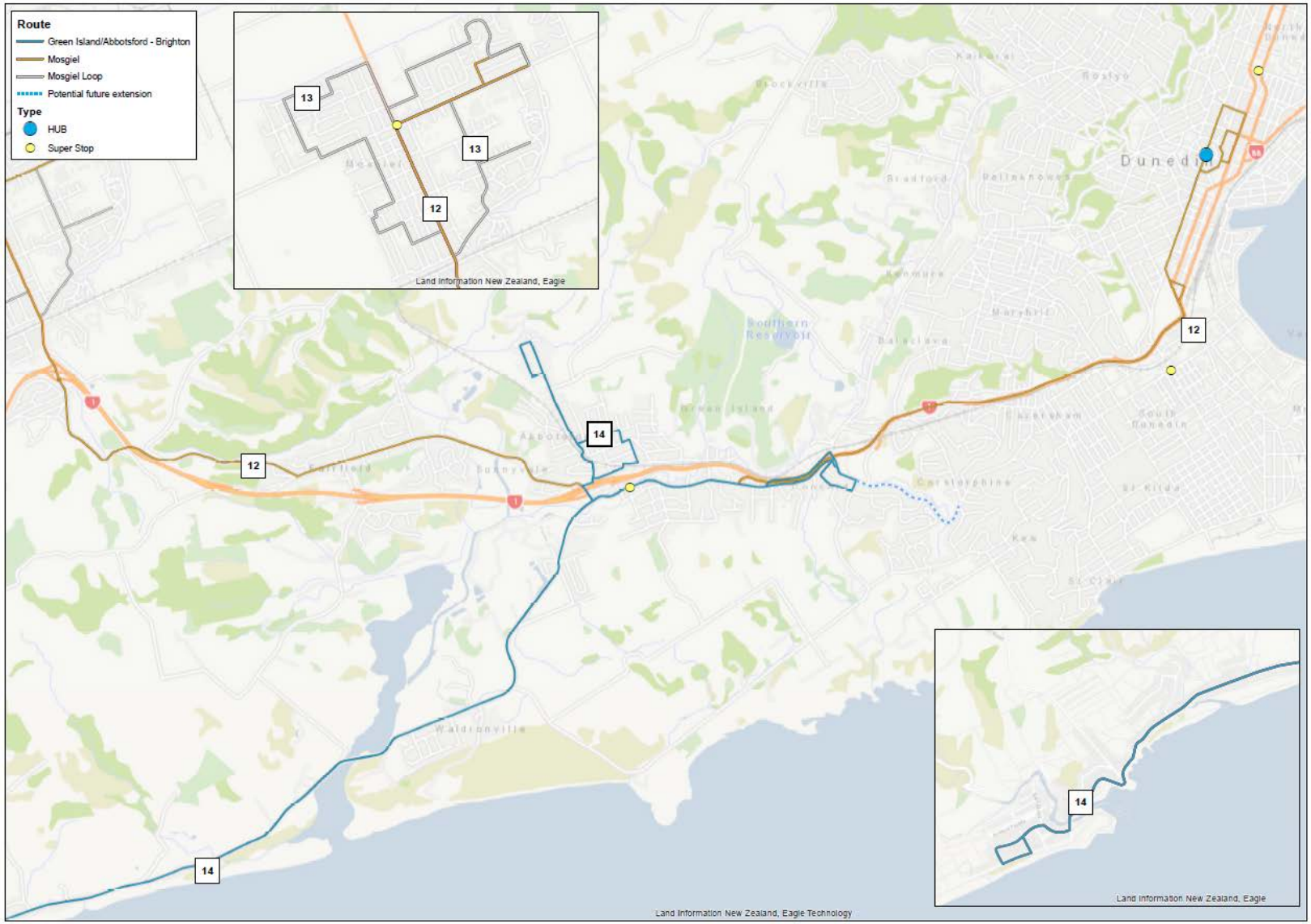
The following amendment to the Regional Public Transport Plan provides the necessary detail to enable the Number 70 Brighton-Abbotsford bus service, Unit 5 to be extended to include a community link between Concord and Green Island initially during off-peak hours.

2.1 Amendment 1

RPTP Reference: Appendix 5, Figure 17

REPLACEMENT MAP

See Page 2


Route
Green Island/Abbotsford - Brighton
Mosgiel
Mosgiel Loop
Potential future extension
Type
HUB
Super Stop
13
13
12
Land Information New Zealand, Eagle
12
14
12
14
14
Land Information New Zealand, Eagle
Land Information New Zealand, Eagle Technology

3.0 Conclusion

The amendments as outlined in this Addendum will allow an extension to the Brighton – Abbotsford bus service to Concord initially during the off-peak. The amendment responds to the Community's desire to reinstate a public transport service link between Green Island and Concord.