

Memo

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To: WRC Transport Committee
Katherine Simpson, Team Leader – Transport Planning

From: Vincent Kuo, Team Leader – Contracts and Insights

Subject: **2026.06.03 Regional Transport Connections PT Update re. the Fuel Situation**

Purpose of this memo

This memorandum provides the third fortnightly update to the WRC Transport Committee on the current fuel environment and its impacts on public transport service delivery. The update is intended to support Committee oversight by summarising key operational and financial indicators, and by highlighting emerging risks and responses associated with fuel cost volatility.

Scope of this update

This memo focuses primarily on recent trends in public transport patronage and fare revenue across bus and rail services. It also outlines any other relevant developments that are considered worth mentioning. Subsequent sections provide more detailed commentary on each of these matters.

It should also be noted that the patronage and fare revenue data (including the % of change between years) for the most recent week presented is provisional and may be subject to minor revision in subsequent reports. This reflects the timing of data extraction, as final figures depend on the capture of complete data for the last day of the reporting period.

New Zealand currently remains at “Phase 1: Watchful” in the national Fuel Response Plan where access to fuel remains steady and available but fuel prices are rising due to global market changes.

Public transport patronage (bus and rail)

The table below presents public transport (bus and rail) patronage data from February to the end of week 22 in both 2025 and 2026, to support year-on-year comparison. It is important to note that direct weekly comparisons between years do not always provide a like-for-like assessment due to variations in the timing of public and school holidays as discussed in detail the previous memos.

For this reason, data has been presented from the beginning of February rather than focusing solely on the most recent fortnight. Committee members will also note that comparative data for the Te Huia service has not been included for weeks 16 and 17, as the service did not operate during these weeks in 2025 due to line closures. Actual patronage figures for weeks 16 and 17 in 2026 are, however, included in the table below.

For clarity, while the below data presents public transport (bus and rail) patronage, the patronage information does not include data from the Thames Connector, 25-Taumarunui and Night Flex services.

Patronage Summary			
	Bus service	Train service	Grand Total
Before Fuel Price Increase			
Week 6			
(2025-02-03 - 2025-02-09)	74922	1185	76107
(2026-02-02 - 2026-02-08)	74774	1024	75798
Week 7			
(2025-02-10 - 2025-02-16)	93520	1636	95156
(2026-02-09 - 2026-02-15)	90577	1686	92263
Week 8			
(2025-02-17 - 2025-02-23)	98954	1562	100516
(2026-02-16 - 2026-02-22)	94027	1905	95932
Week 9			
(2025-02-24 - 2025-03-02)	101733	1599	103332
(2026-02-23 - 2026-03-01)	98105	1985	100090
Fuel Price Increased			
Week 10			
(2025-03-03 - 2025-03-09)	100516	1576	102092
(2026-03-02 - 2026-03-08)	101516	1666	103182
Week 11			
(2025-03-10 - 2025-03-16)	100599	1820	102419
(2026-03-09 - 2026-03-15)	99562	1844	101406
Week 12			
(2025-03-17 - 2025-03-23)	96464	1578	98042
(2026-03-16 - 2026-03-22)	101764	1973	103737
Week 13			
(2025-03-24 - 2025-03-30)	96902	1745	98647
(2026-03-23 - 2026-03-29)	97957	2169	100126
Week 14			
(2025-03-31 - 2025-04-06)	91286	1430	92716
(2026-03-30 - 2026-04-05)	84979	1311	86290
Week 15			
(2025-04-07 - 2025-04-13)	93601	1367	94968
(2026-04-06 - 2026-04-12)	54099	1908	56007
Week 16			
(2025-04-14 - 2025-04-20)	50656		50656
(2026-04-13 - 2026-04-19)	64960	2483	67443
Week 17			
(2025-04-21 - 2025-04-27)	47022		47022
(2026-04-20 - 2026-04-26)	98462	1543	100005
Week 18			
(2025-04-28 - 2025-05-04)	91303	1454	92757
(2026-04-27 - 2026-05-03)	87459	1813	89272
Week 19			
(2025-05-05 - 2025-05-11)	92680	1447	94127
(2026-05-04 - 2026-05-10)	97968	1914	99882
Week 20			
(2025-05-12 - 2025-05-18)	92981	1740	94721
(2026-05-11 - 2026-05-17)	97463	2226	99689
Week 21			

(2025-05-19 - 2025-05-25)	93795	1602	95397
(2026-05-18 - 2026-05-24)	98078	1820	99898
Week 22			
(2025-05-26 - 2025-06-01)	86363	936	87299
(2026-05-25 - 2026-05-31)	93157	1352	94509
Total Patronage: Week 10 - 22			
(2025-03-03 - 2025-06-01)	1134168	16695	1150863
(2026-03-02 - 2026-05-31)	1177424	24022	1201446

The following table presents the percentage change in public transport patronage on a week-by-week basis, comparing each week with the equivalent week in the previous year. This provides an indication of relative growth or decline in patronage over time, while accounting for seasonal patterns and variability across the reporting period.

Period Type	Weeks	Bus service	Train service
Before Fuel Price Increase			
	Week 6 ▼	-0.2%	▼ -13.6%
	Week 7 ▼	-3.1%	▲ 3.1%
	Week 8 ▼	-5.0%	▲ 22.0%
	Week 9 ▼	-3.6%	▲ 24.1%
Fuel Price Increased			
	Week 10 ▲	1.0%	▲ 5.7%
	Week 11 ▼	-1.0%	▲ 1.3%
	Week 12 ▲	5.5%	▲ 25.0%
	Week 13 ▲	1.1%	▲ 24.3%
	Week 14 ▼	-6.9%	▼ -8.3%
	Week 15 ▼	-42.2%	▲ 39.6%
	Week 16 ▲	28.2%	
	Week 17 ▲	109.4%	
	Week 18 ▼	-4.2%	▲ 24.7%
	Week 19 ▲	5.7%	▲ 32.3%
	Week 20 ▲	4.8%	▲ 27.9%
	Week 21 ▲	4.6%	▲ 13.6%
	Week 22 ▲	7.9%	▲ 44.4%

The following key observations summarise week-by-week changes in public transport patronage for 2026 compared with the same period in 2025.

- Early divergence between modes pre-fuel increase: Prior to the fuel price increase, bus patronage remained slightly below 2025 levels, while rail patronage showed strong and increasing growth from Week 8 onward.
- Gradual bus recovery following fuel price increase: From Week 10 onwards, bus patronage begins to stabilise and show modest growth, suggesting a gradual return to previous levels and a possible early behavioural response to increased fuel costs.

- Clear post-holiday strengthening trend, particularly for rail: From Week 18 to Weeks 22, both modes show more stable growth. Bus patronage records moderate increases (around 5%), while rail continues to demonstrate strong and sustained growth (approximately 25–44%), suggesting strengthening demand and a potential ongoing shift toward public transport following fuel price increases.

Public transport fare revenue (bus and rail)

The table below presents public transport (bus and rail) fare revenue from February to the end of May for 2025 and 2026 to support year-on-year comparison. Figures reflect farebox revenue only (excluding GST) collected from customers and exclude subsidies, café sales, and bus-back advertising income. Fare revenue from the Thames Connector, 25-Taumarunui, and Night Flex services is also not included.

Comparisons between weeks should be interpreted with caution due to differences in the timing of public and school holidays between years, as well as the impact of Te Huia service disruptions in 2025.

The accompanying table shows the weekly percentage change in fare revenue compared with the same week in the previous year, providing an indication of relative trends over time alongside patronage patterns and seasonal influences.

Revenue collect from customer summary	Bus service	Train service	Grand Total
Before Fuel Price Increase			
Week 6			
(2025-02-03 - 2025-02-09)	\$ 112,528.61	\$ 12,954.26	\$ 125,482.87
(2026-02-02 - 2026-02-08)	\$ 119,337.47	\$ 12,547.66	\$ 131,885.13
Week 7			
(2025-02-10 - 2025-02-16)	\$ 138,497.39	\$ 17,483.30	\$ 155,980.70
(2026-02-09 - 2026-02-15)	\$ 142,265.96	\$ 20,886.02	\$ 163,151.97
Week 8			
(2025-02-17 - 2025-02-23)	\$ 147,854.87	\$ 18,163.83	\$ 166,018.70
(2026-02-16 - 2026-02-22)	\$ 148,088.64	\$ 21,183.26	\$ 169,271.90
Week 9			
(2025-02-24 - 2025-03-02)	\$ 147,817.30	\$ 18,070.70	\$ 165,888.00
(2026-02-23 - 2026-03-01)	\$ 152,905.53	\$ 22,825.10	\$ 175,730.63
Fuel Price Increased			
Week 10			
(2025-03-03 - 2025-03-09)	\$ 145,827.39	\$ 17,099.48	\$ 162,926.87
(2026-03-02 - 2026-03-08)	\$ 156,273.58	\$ 19,066.38	\$ 175,339.97
Week 11			
(2025-03-10 - 2025-03-16)	\$ 145,507.22	\$ 20,275.83	\$ 165,783.04
(2026-03-09 - 2026-03-15)	\$ 153,134.34	\$ 21,869.06	\$ 175,003.40
Week 12			
(2025-03-17 - 2025-03-23)	\$ 141,000.52	\$ 16,913.04	\$ 157,913.57
(2026-03-16 - 2026-03-22)	\$ 156,206.99	\$ 22,728.15	\$ 178,935.14
Week 13			
(2025-03-24 - 2025-03-30)	\$ 139,218.87	\$ 17,645.74	\$ 156,864.61
(2026-03-23 - 2026-03-29)	\$ 149,447.66	\$ 21,451.23	\$ 170,898.90
Week 14			
(2025-03-31 - 2025-04-06)	\$ 134,175.83	\$ 16,122.09	\$ 150,297.91

(2026-03-30 - 2026-04-05)	\$ 130,487.68	\$ 14,329.04	\$ 144,816.72
Week 15			
(2025-04-07 - 2025-04-13)	\$ 134,254.61	\$ 14,057.39	\$ 148,312.00
(2026-04-06 - 2026-04-12)	\$ 69,491.08	\$ 23,711.17	\$ 93,202.25
Week 16			
(2025-04-14 - 2025-04-20)	\$ 64,655.48		\$ 64,655.48
(2026-04-13 - 2026-04-19)	\$ 83,965.93	\$ 30,695.99	\$ 114,661.92
Week 17			
(2025-04-21 - 2025-04-27)	\$ 58,018.87		\$ 58,018.87
(2026-04-20 - 2026-04-26)	\$ 147,736.32	\$ 18,052.80	\$ 165,789.12
Week 18			
(2025-04-28 - 2025-05-04)	\$ 132,905.65	\$ 15,094.87	\$ 148,000.52
(2026-04-27 - 2026-05-03)	\$ 133,101.45	\$ 17,480.01	\$ 150,581.46
Week 19			
(2025-05-05 - 2025-05-11)	\$ 133,391.04	\$ 15,611.22	\$ 149,002.26
(2026-05-04 - 2026-05-10)	\$ 148,303.30	\$ 20,821.52	\$ 169,124.82
Week 20			
(2025-05-12 - 2025-05-18)	\$ 133,700.78	\$ 17,544.52	\$ 151,245.30
(2026-05-11 - 2026-05-17)	\$ 146,764.37	\$ 23,057.70	\$ 169,822.08
Week 21			
(2025-05-19 - 2025-05-25)	\$ 132,802.70	\$ 16,690.09	\$ 149,492.78
(2026-05-18 - 2026-05-24)	\$ 146,311.51	\$ 20,011.61	\$ 166,323.12
Week 22			
(2025-05-26 - 2025-06-01)	\$ 125,202.96	\$ 10,553.83	\$ 135,756.78
(2026-05-25 - 2026-05-31)	\$ 139,755.17	\$ 14,824.32	\$ 154,579.50
Total Fare Revenue: Week 10 - 22			
(2025-03-03 - 2025-06-01)	\$1,620,661.91	\$177,608.09	\$1,798,270.00
(2026-03-02 - 2026-05-31)	\$1,760,979.39	\$268,099.00	\$2,029,078.39

The following table presents the percentage change in public transport fare revenue on a week-by-week basis, comparing each week with the equivalent week in the previous year. This provides an indication of relative growth or decline in revenue over time, while accounting for seasonal patterns and variability across the reporting period.

Period Type	Weeks	Bus service	Train service
Before Fuel Price Increase			
	Week 6 ▲	6.1%	▼ -3.1%
	Week 7 ▲	2.7%	▲ 19.5%
	Week 8 ▲	0.2%	▲ 16.6%
	Week 9 ▲	3.4%	▲ 26.3%
Fuel Price Increased			
	Week 10 ▲	7.2%	▲ 11.5%
	Week 11 ▲	5.2%	▲ 7.9%
	Week 12 ▲	10.8%	▲ 34.4%
	Week 13 ▲	7.3%	▲ 21.6%
	Week 14 ▼	-2.7%	▼ -11.1%
	Week 15 ▼	-48.2%	▲ 68.7%
	Week 16 ▲	29.9%	
	Week 17 ▲	154.6%	
	Week 18 ▲	0.1%	▲ 15.8%
	Week 19 ▲	11.2%	▲ 33.4%
	Week 20 ▲	9.8%	▲ 31.4%
	Week 21 ▲	10.2%	▲ 19.9%
	Week 22 ▲	11.6%	▲ 40.5%

Key observations are as follows:

- Early revenue growth, led by rail: Prior to the fuel price increase, bus fare revenue shows consistent modest growth, while rail revenue demonstrates strong increases from Week 7 onward, indicating stronger underlying demand and recovery in rail services.
- Sustained growth following fuel price increase: In the period immediately following the fuel price increase (Weeks 10–13), both bus and rail revenue continue to grow, with particularly strong gains in rail, suggesting increased public transport usage and/or improved yield during this period.
- Strong recovery and stabilisation in later weeks: Following the holiday period, bus revenue rebounds strongly before stabilising, while rail revenue maintains consistent and strong growth through Weeks 18–22 (approximately 28%). This indicates a return to more stable demand and sustained strength in rail revenue performance.

Operator feedback

Council has sought feedback from contracted operators regarding the impact of current fuel conditions on service delivery. At this stage, no operators have raised concerns or reported any issues affecting the delivery of services.

Customer Focus update

Public transport promotional activities are encouraging public transport as a cost-effective alternative to driving; we are working in a broader regional focus. Two media schedules are live, “Take the bus” and a Te Huia rolling campaign. Additionally, the “Pass it on campaign” across WRC channels has a built-in promotion of a weekly cap to build general awareness, while BUSIT and Te Huia platforms deliver more targeted communications.