

# **Integrated Fares and Ticketing (IFT)**

## **(Revised) Fare Media Transition Plan**

### Rail products

Amended with the fare changes to be implemented from 2018

25 October 2017

**Disclaimer**

This document is current as at the date on its cover and may be updated from time to time jointly by GWRC and Transdev, as required.

## CHANGE HISTORY AND APPROVAL

The following Change History log contains a record of changes made to this document.

PUBLISHED/ REVISED DATE	VERSION#	AUTHOR (OPTIONAL)	SECTION / NATURE OF CHANGE
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3 October 2017	06	Reza Chalabianlou	Amended with the final fare package for consideration by the Transition Group

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<b>Informed</b>	Those people <b>informed</b> on policy, service or procedure and who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication.

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# 1 Introduction

## Purpose

This Fare Media Transition Plan (FMTP) – Rail sets out requirements for changes to rail fares and ticketing under the partnering contracts between Greater Wellington Regional Council (GWRC) and the operator of rail services (Transdev) under the Public Transport Operating Model (PTOM).

The document provides the basis for GWRC to work with Transdev through the transition to an Integrated Fares and Ticketing (IFT) system over the next several years.

## Context

GWRC endorsed an IFT Fares and Products Transition Strategy on 24 February 2016. The transition strategy sets high level guidance on how to move from the existing set of fares and ticketing products to a simpler and more equitable system. The objective is to reduce gradually the number of fares and ticketing products to enable delivery of an IFT system across all modes (rail, bus and ferry).

Under the PTOM partnering contracts, GWRC is required to develop a FMTP. The Operator (Transdev) is required to comply with the FMTP and all its appendices including the Metlink fare schedule, Metlink Fare Rules Manual, Metlink Conditions of Carriage and any other operational terms and conditions relating to Metlink fares, ticketing and media.

The first version of the FMTP was provided to Transdev in April 2016 and was used to guide implementation of some initial changes to fares and products in July 2016.

GWRC has recently completed the Public Transport Fares review, resulting in some changes to the policy basis for fares transition for both bus and rail. The proposed fare changes are outlined in Section 2 of this plan.

This version of the FMTP for rail has been updated, taking account of the new fares environment expected to come into effect in July 2018; and provides the basis for GWRC and Transdev to implement the changes to fares and products on rail.

## Scope

Guided by the PTOM partnering contract, this Fare Media Transition Plan covers the following key matters:

- The transition approach, phases and milestones
- Fare products to be sold and accepted by the Operator through various stages of transition
- Fare rules and conditions applying to Metlink products
- Fare schedule and prices of fare products
- Ticket stock management
- Requirements for sales, validation, refund and ticket exchange
- Revenue protection requirements
- Changes to fares information including conditions of carriage
- Communication, marketing and customer service requirements
- Data recording and reporting requirements.

GWRC will work with Transdev to implement the fares and ticketing transition plan as set out in this document.

This plan is a “living document” and will be updated from time to time jointly by GWRC and Transdev, as required. Additional operational matters of concern to Transdev and GWRC not included in this plan will be covered in other operational documents, through the business planning process or in the next amendments to this plan and its appendices.

This plan does not cover the transitional arrangements for bus and ferry service fare products, which will be addressed in separate documents.

## **2 Changes to fare policies and fares**

### **Variation to Regional Public Transport Plan**

A variation to the fares policies in the Regional Public Transport Plan (PT Plan) was proposed following the fares review in 2016/17. The PT Plan variation is intended to retain a policy for off-peak fares, but also to provide a concession fare to improve access to affordable public transport for those most dependent on public transport. To do so, a variation to PT Plan was proposed to include the following two new policies:

- A new concession fares policy to provide concession fares to improve access to affordable public transport for those most dependent on public transport; and
- A new policy to encourage more frequent use of public transport, more off-peak travel and greater use of electronic ticketing.

The new concession fares were proposed for full-time tertiary students and customers with special accessibility needs (blind and disabled).

The new policy to reward target behaviours includes a fare capping in the future to encourage greater use by frequent users, off-peak fares to encourage travel when there is spare capacity and to ensure that cash fares are priced at a premium over other fares to encourage greater use of electronic ticketing.

The variation was adopted by Council on 31 October 2017, and is required to enable implementation of the fare changes from the start of bus PTOM contracts and IBTS in 2018.

### **Fare initiatives from PT Fares Review**

A new package of fare initiatives was endorsed by Council on 31 October 2017. The package includes the following key fare changes:

- Base fares will be increased by 3 percent resulting in variable fare increases for all other fares
- Transfers between Metlink buses will be free i.e. there will be no additional cost for journeys requiring one or more transfers, up to three transfers each within 30 minutes of the last tag-off
- The existing maximum 3 zones fare will be removed to enable free bus-to-bus transfers
- Child discounts and cash premiums will be standardised across the number of zones travelled
- A 25% off-peak discount off the base fares (adult smartcard fares) will be introduced
- Off-peak times will be aligned with SuperGold off-peak periods
- An all-time 25% discount off the base fares will be provided to full-time tertiary students
- An all-time 50% discount off the base fares will be provided to blind and disabled customers
- Bona fide carers accompanying the disabled and blind customers will be entitled for free travel
- All legacy day passes will be replaced with four new zone-based Metlink Explorer day passes
- Rail monthly passes with an origin or destination in Wellington will allow bus connections to trains within zones 4 to 14 – rail monthly passes will change from station-based to zone-based
- Fare zone boundaries will be adjusted in Porirua and at Ngauranga Station
- A Wellington 30 Day bus pass will be available on all Metlink buses within zones 1 to 3
- An Eastbourne 30 Day bus pass will be available on all Metlink buses within zones 1 to 3 and on direct bus routes between Eastbourne and Wellington (i.e. routes 81, 83, 84, 85, N88)
- All other operator-specific products will be discontinued (including GO Wellington, GetAbout and Hutt Commuter 30-day passes, school term passes and bus special event fares)

The aim of the fare package is to simplify and standardise fare products and to pave the way for network-wide integration of fares and ticketing.

IFT is expected to enable introduction of more innovative ticketing and fare products such as daily and weekly fare capping and an open multi-modal payment method such as credit cards, debit cards and smart phones. Making the suite of reduced fares and cash premiums available on a multi-modal payment method under IFT is expected to result in a higher proportion of electronic fare payment transactions, potentially phasing out cash payments over time.

### Fare schedule and prices of fare products

GWRC sets and regulates fares through its annual fare review process and other mechanisms. Current and new fares (from July 2018) and prices of rail products are provided in Appendix A.

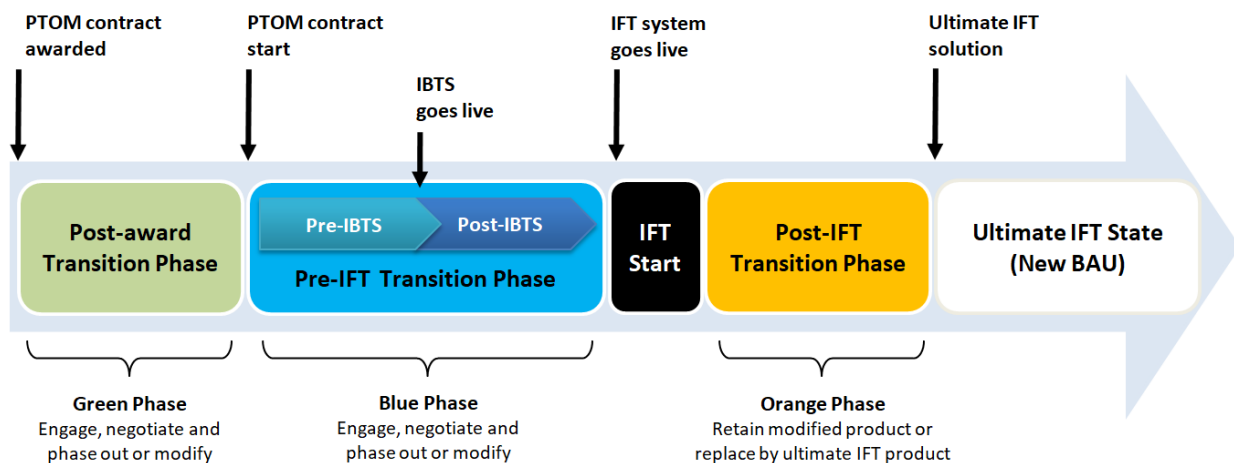
The new fares were endorsed by Council on 31 October 2017. Any future changes to fares and fare products will be communicated early with operators. GWRC will work with Transdev and other partners to manage communications and marketing matters.

## 3 Approach to transition

### Transition phases and milestones

Figure 1 illustrates the overall approach to transition that identifies the key phases and milestones.

**Figure 1. Overall approach to transition of fare fares products and media**

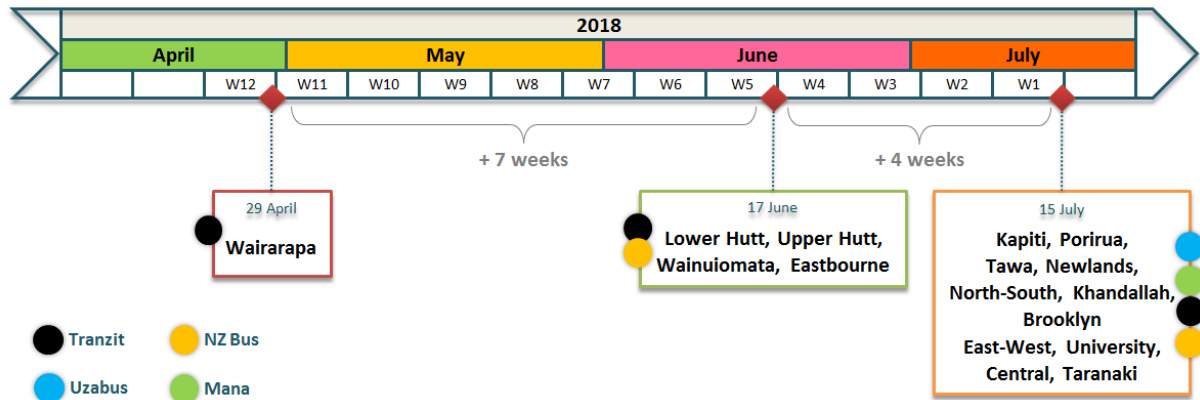


The green, blue and orange phases are distinguished by key events. The green phase for rail started with the award of the PTOM rail contract in February 2016; followed by the blue phase that started with the commencement of PTOM rail services in July 2016 and will continue until the orange phase will start with IFT electronic ticketing under the National Ticketing Programme (NTP) in about 2020.

Major changes to rail fare products in blue phase will happen from mid-2018 when the planned fare changes will be implemented and the PTOM bus contracts and IBTS will start, as shown in Figure 1.

In August 2017, GWRC and the incoming bus operators have agreed to start the contracted PTOM units in three tranches, as shown in Figure 2. The PTOM bus units in Wairarapa, Upper Hutt, Lower Hutt, Wainuiomata and Eastbourne are scheduled to commence in the first half of 2018, followed by all other PTOM bus units in July 2018. To ensure consistency between rail and bus, the changes to rail fare products will be aligned, where possible, with the changes to bus fare products through the three tranches of transition to PTOM bus units.

**Figure 2: Staggered commencements of PTOM bus units in three tranches by mid-July 2018**



Some trade-offs may be needed to identify when and how the changes to fare products should take place. For example, some multi-trip passes such as Metlink Explorer or Monthly Plus passes are available on more than one operator service or on services that will transition to more than one operator unit. Earlier start of PTOM units in areas where these products are available may undermine viability of the products for customers and for the incumbent and incoming operators. This may also have revenue impacts for GWRC and incumbent operators and require revenue apportionment and variations to contracts. To mitigate the impacts on customers, GWRC and incumbent operators, changes to these products would therefore need to be deferred until the last bus services are replaced with PTOM units and the rest of the fare package is implemented in areas where the products are currently available.

Major changes to rail fare products are hence planned to happen at the following three milestones:

- Commencement of the rail PTOM contract (at start of blue phase)
- Network-wide start of IBTS and implementation of the fare changes and (during blue phase)
- Start of IFT (at the end of blue phase)

The following fare products and special ticketing arrangements were discontinued at the start of PTOM rail services in July 2016 (start of blue phase):

- Group day passes (Wairarapa Group Day Excursion and Group Day Rover)
- Off-peak 10 trip tickets
- Pro rata sales of monthly passes
- Special event tickets (Trentham Race ticket and Wings Over Wairarapa tickets); and
- Passenger tax invoice

The remaining rail tickets were Metlink branded with the information on the back of tickets amended to comply with the Metlink conditions of carriage and fare rules. Transdev have been managing staff travel passes and covering the costs of providing free or subsidised travel, with the exception of free travel for Transdev staff in Metlink uniforms travelling to or from work that has been paid for by GWRC under the PTOM rail contract.

This Fares Media Transition Plan, therefore, focuses on the changes required in the blue phase. The date for IFT electronic ticketing (and thus the start of the orange phase) has yet to be confirmed, but is expected to commence in 2020.

### Transition pathways for rail fare products

Figure 3 outlines how existing rail products are planned to transition to their ultimate states. Colours in the diagram identify the green, blue and orange transition phases.

**Figure 3: Transition pathways for rail products**

25/10/2017			Rail PTOM start Jul-2016	Bus PTOM/IBTS start Jul-2018	IFTstart Possible date: Jul-2020
% Boardings	Fare Product or Concession	Transition			
0%	60,000	Group day passes	Discontinued at rail PTOM start		
N/A	Minimum fare Wairapa Line	Review options to discontinue surcharges	Changes to be determined	Discontinued	
3%	400,000	Occasional tickets (single, 10-trip and monthly)	Continue and manage to reduce usage	Continue with likely rule change and manage to reduce usage Plan to discontinue by start of IFT	Discontinued
0%	9,000	Wellington single event tickets	Continue in the interim and Manage to provide special event tickets in Wellington for large events as required		
1%	80,000	Wellington return event tickets	Plan to replace with a ticketing arrangement to include public transport in the prices of event tickets at or before the start of IFT		
0%	1,000	Other event tickets	Discontinued at rail PTOM start		
0%	20,000	Staff travel passes	Discontinued except for free operator staff travel to and from work in Metlink attire on Metlink rail services. Plan to include on IFT		
N/A	Pro rata monthly pass	Discontinues at rail PTOM start			Free rail staff travel included in IFT system
38%	4,700,000	Monthly pass	Plan to change to zone to zone and extend Wellington-anchored monthly passes to include free bus connections within zones 4 to 14	Continue and standardise discounts to accommodate capping Plan to replace with weekly cap	Weekly cap
1%	80,000	Monthly Plus passes	Plan to replace with standard Metlink Wellington-anchored monthly passes with free bus connections within zones 4 to 14 from mid-2018	Replaced by monthly passes with regional bus connections Plan to replace with weekly cap	Weekly cap
0%	600	Kapiti Combo return tickets	Plan to replace with weekly cap		
1%	70,000	School term pass	Plan to discontinue in mid-2018	Discontinued Plan to introduce weekly cap	Weekly cap
1%	150,000	Day Rover	Discontinue and replace with new Metlink Explorer tickets		
0%	20,000	Wairapa Day Excursion tickets (adult and child)	Plan to discontinue from mid-2018 and replace with new Metlink Explorers (1-3, 1-7, 1-10 and 1-14 zones)	Plan to replace new Metlink Explorer passes with daily cap	Daily cap
0%	20,000	Metlink Explorer	Plan to replace new Metlink Explorer passes with daily cap		
0%	40,000	3 Day Rover	Discontinued and replaced with Metlink targeted concessions Plan to include on IFT		
N/A	Legacy targeted concessions (blind, IHC)	Plan to replace with standard set of targeted concessions (including for tertiary student) from mid-2018 Introduce new 10-trip concession tickets	Discontinued and replaced with Metlink targeted concessions Plan to include on IFT		
4%	530,000	SuperGold concession	Continue accepting SuperGold cards during SuperGold off-peak hours in accordance with the terms and conditions set out in this Plan Plan to incorporate on IFT		
1%	90,000	Child under 5	Continue accepting child under 5 and plan to incorporate on IFT		
0%	40,000	Transfer products	Continue and review terms and conditions Rules may change to align with the changes to single and 10-trip tickets including the new off-peak and concession tickets - to be determined) Plan to replace with integrated fares across modes at IFT start		
15%	1,900,000	On-board cash strip tickets	Plan to change to zone-based tickets valid for single rail journey	Plan to discontinue at IFT start	Available on IFT
30%	3,700,000	10 trip tickets	Plan to change to multi-line zone to zone 10 trip tickets	Plan to discontinue at IFT start	Available on IFT
0%	60	Off-peak 10 trip tickets	Discontinued at rail PTOM start Plan to introduce new off-peak 10-trip tickets at bus PTOM start	Off-peak tickets discontinued New off-peak 10-trip tickets introduced	Off-peak fares for single journeys available on IFT
1%	170,000	Off-peak single trip cash tickets	Discontinue at bus PTOM start Plan to introduce new off-peak 10-trip tickets at bus PTOM start	Plan to discontinue at IFT start and include off-peak fares on IFT	Off-peak fares for single journeys available on IFT
4%	440,000	Off-board single trip cash tickets	Plan to change to zone to zone tickets valid on more than one line	Plan to replace with standard cash tickets and include on IFT	Standard cash single trip ticket available on IFT



## **4 Changes from start of Interim Bus Ticketing Solution**

### **Changes to ticketing systems and fare media**

The rail ticketing system will remain unchanged in the interim and will likely continue to be paper-based until start of the IFT electronic ticketing. However, an interim bus ticketing solution (IBTS) will be introduced for all PTOM bus operators and across the entire bus network at the commencement of the new PTOM bus contracts from late April 2018. All Metlink buses will be equipped with Snapper devices and systems configured to accommodate the new package of fare products.

The Snapper system will be configured to record usage of the Metlink rail tickets that will also be valid on designated bus services, including the monthly passes with bus connections and Metlink Explorer tickets, as described in the following sections. These types of tickets will require special design (e.g. using identifiable signs or colour coding) or sales arrangements to enable bus drivers to easily identify the tickets and therefore minimise the validation time and amount of interaction with customers.

### **Changes to fare products and concessions**

The following fare products and special ticketing arrangements will either be discontinued or replaced with new Metlink products in mid-2018. Some changes to tickets (so long as they require no fare changes) may be brought in earlier aligned with the start of IBTS and new PTOM bus services. However the tickets that are planned to be replaced will be retained until the alternative products are made available. The key activities required to implement the transitions are described in Section 6.

#### **4.1 Legacy fare products to be discontinued in mid-July 2018**

The following tickets will be discontinued in mid-July 2018 when the new package of fare changes will be implemented:

- Single trip off-peak cash tickets (both on-board sale and at ticket offices)
- School term passes
- Cash fare concessions for blind and IHC

#### **4.2 Legacy fare products to be replaced with alternative Metlink products**

The following tickets will either be replaced with alternative fare products or will be reprinted with new terms and conditions from mid-July 2018 when the new package of fare changes will be implemented. Some changes may come into effect earlier from the start of IBTS, such as modifying tickets to show origin and destination zones rather than stations:

- Single trip cash tickets will be replaced with zone-to-zone cash tickets
- Strip tickets will be replaced with on-board single trip tickets for number of zones travelled
- Legacy 10-trip targeted concession tickets (blind and IHC) will be replaced with a standard concession for blind and disabled (including IHC) on 'Accessible' 10-trip tickets.
- 10-trip tickets will be replaced with multi-line zone-to-zone 10-trip tickets
- Transfer tickets will be reprinted with new terms and conditions
- All day passes (including 3 Day Rover) will be replaced with four Metlink Explorer tickets
- Rail monthly passes will be replaced with multi-line zone-to-zone monthly passes
- Rail monthly passes with bus connections will be replaced with standard zone-to-zone rail monthly tickets with bus connections within zones 4 to 14
- The zone boundary changes in Porirua and Ngauranga Station will require new fare charts
- A new set of multi-line zone-to-zone off-peak 10-trip tickets will be introduced
- A new set of multi-line zone-to-zone 10-trip tickets for tertiary students will be introduced
- Bona fide carers who will be accompanying the eligible disabled and blind customers will be entitled for free travel

GWRC will work with Transdev and other partners (including tertiary institutions, NZ Foundation of Blind, CCS and IHC) to establish appropriate concession schemes including eligibility criteria and registration requirements and processes to design and administer the 10-trip concession tickets.

### 4.3 Legacy fare products to be continued

The following fare products will continue with likely minor changes to terms and conditions. Any changes to terms and conditions will be communicated early with Transdev.

- Wellington single and return event tickets
- Minimum cash fare of 8 zones and surcharges on Wairarapa afternoon peak services
- Occasional tickets will continue to be issued in limited numbers where necessary

A separate review will consider options to remove the surcharges on Wairarapa services.

GWRC will work with Transdev to include travel on rail services in the price of event tickets.

### 4.4 Metlink fare products and concessions to be sold and validated from 2018

The rail fare products and concessions that need to be sold and administered by Transdev from the start of IBTS in 2018 are listed in Table 1. Rules for each product are defined in Appendix B.

**Table 1 Rail fare products to be administered by PTOM rail operator from 2018**

Fare product		Eligible groups	Valid time of day	Valid lines/services		
<b>Single trip tickets</b>						
1	Adult cash tickets	off-board	All fare paying passengers	All times	All rail lines within the zones of validity	
2		on-board				
3	Child cash tickets	off-board				School children <sup>(a)</sup>
4		on-board				
5	Transfer ticket (one transfer per ticket)		All fare paying passengers	All times	To be determined	
6	Adult event tickets – Single		School children	Event days only	Designated special event services to be allocated as required	
7	Child event tickets – Single					
<b>Multi-trip passes<sup>(b)</sup></b>						
8	Adult 10-trip tickets		All fare paying passengers	All times	All rail lines within the zones of validity	
9	Child 10-trip tickets		School children			
10	Accessible 10-trip tickets		Blind, people with a permanent disability, IHC (eligibility to be determined)			
11	Tertiary student 10-trip tickets		Full time tertiary students (eligibility to be determined)			
12	Off-peak 10-trip tickets		Adults not entitled to other concessions	Off-peak period <sup>(c)</sup>	All rail lines within the zones of validity	
13	Metlink Explorer day passes	Zones 1-3	All fare paying passengers with an accompanying child aged 15 and under	After 9.00am on weekdays and all day on weekends and public holidays		
14		Zones 1-7				
15		Zones 1-10				
16		Zones 1-14				
17	Adult monthly passes <sup>(d)</sup>		All fare paying passengers	All times	Kapiti Line services within zones 9 and 10	
18	Child monthly passes		School children			
19	Kapiti Combo tickets	Waikanae	All fare paying passengers			
20		Otaki				
21	Adult event tickets – Return		School children	Event days only	Designated special event services	
22	Child event tickets – Return					
<b>Free travel concessions</b>						
23	Free travel for children under five years		Children under five years of age	All times	All rail lines	
24	Free travel for carers		Bona fide carers accompanying eligible disabled and blind customers			
25	Free travel for SuperGold card holders		Holders of SuperGold/Veteran SG card			Off-peak period
<b>Special ticketing arrangements</b>						
26	Minimum fare and surcharges		All fare paying passengers	Afternoon peak <sup>(e)</sup>	Outbound Wairarapa services within zones 1 to 7	
27	Occasional tickets		Variable depending on tickets	All times	All rail lines within the zones of validity	
28	Special event tickets		Variable depending on tickets	Event days only	Designated special event services	

<sup>(a)</sup> Children aged 5 to 18 (or older if still at school) must be in school uniform or present a valid secondary school photo identification

<sup>(b)</sup> Existing pass products may temporarily continue on PTOM buses, if required due to e.g. staggered deployment of PTOM units

<sup>(c)</sup> Times identified as off-peak are aligned with off-peak times for SuperGold scheme covering a period from 9:00am to 3:00pm and after 6:30pm Monday to Friday; and all day on Saturday, Sunday and public holidays

<sup>(d)</sup> Rail monthly passes with an origin or destination in zone 1 (Wellington city) allow bus connections within zones 4 to 14.

<sup>(e)</sup> Afternoon peak is defined as a period between 3:00pm to 6:30pm Monday to Friday.

## 5 Changes from start of IFT

### Changes to ticketing system and fare media

Phased delivery of a fully integrated national electronic fares and ticketing system (IFT), referred to as the National Ticketing Programme (NTP), is currently planned for 2020 commencing with rail followed by bus services.

### Changes to fare products and concessions

GWRC will continue working with operators to further simplify and standardise the fares and ticketing system in the lead-up to IFT. The primary purpose of simplification is to:

- Integrate fares across all Metlink bus, rail and ferry services
- Significantly reduce on-board cash payments over time; and
- Replace all multi-trip and period pass products with daily and weekly capped fares at the start of IFT or in stages within a few years after start of IFT.

The product transitions, as shown in Figure 3, are grouped by the trajectory of changes from their existing form to an end state.

GWRC will review the Metlink fares and fare policies prior to start of IFT. The review may result in further changes to the fare structure or fare levels. It is envisaged that the ultimate package of fare products and concessions at the start of IFT will have the following make up:

- **Single journey fares using IFT payment method** – base fares with various concessions:
  - Adult (base fares)
  - Child (50% concession off the adult fares)
  - Tertiary student (25% concession off the adult fares)
  - Accessible (50% concession off the adult fares)
  - Off-peak (25% concession off the adult fares)
- **Free travel concessions** – for the following groups:
  - Accompanied child under 5 on all Metlink services at all times
  - SuperGold card holders during SuperGold off-peak periods
  - Bona fide carers who will be accompanying the eligible disabled and blind customers will be entitled for free travel
- **Capping scheme** – to reward frequent and regular users
  - Daily caps
  - Weekly caps
- **Integrated public transport and event fares** – to encourage PT use during special events
- **Penalty fares** – to discourage fare evasion and protect revenue

## 6 Transition activities

Implementation of the changes will involve the following activities:

- Changes to fare rules and conditions of carriage
- Ticket stock management
- Sales and validation
- Refund and ticket exchange
- Communication and marketing
- Data collection and reporting

These activities are described further below.

## **Rules and conditions for fare products**

Rules and conditions applying to fare products and tickets are provided in the attached documents including the Metlink 'Fare Rules Manual' (Appendix B) and 'Refund and Exchange Policy' (Appendix C). Any remaining minor operational issues will be managed on an ad hoc basis by direct communication and agreement with Transdev.

The Metlink fare rules manual will be updated to include the eligibility requirements, rules and other necessary terms and conditions for the new or modified fare products and concessions and will be communicated to Transdev in due course.

Any changes to the terms and conditions should be amended in the information on the back of the reprinted tickets and on the Metlink websites. Likewise, any changes to terms and conditions of the cash and 10-trip tickets would require consequential changes to terms and conditions of transfer ticket. The key changes to terms and conditions of rail products are outlined below:

### **Single trip cash tickets (sold at ticket offices)**

- Tickets will change to show the origin and destination zones rather than stations
- Tickets will be valid on more than one line

### **Single trip cash tickets (sold on-board the trains)**

- Strip tickets will change to tickets showing number of zones
- Tickets will be valid for use only on the train it is sold unless with a transfer ticket

### **10-trip tickets**

- Tickets will change to show the origin and destination zones rather than stations
- Tickets will be valid on more than one line
- New multi-line zone-to-zone 10-trip tickets will be designed for off-peak travel, tertiary student and accessible concessions (to reduce the number of tickets, child and accessible 10-trip tickets may be consolidated into a concession 10-trip ticket Tertiary students may be allowed to use 10-trip off-peak tickets out of off-peak hours subject to certain conditions)
- Off-peak times will be aligned with the SuperGold off-peak hours defined as between 9:00am and 3:00pm and after 6.30pm weekdays and all day weekends and public holidays.

### **Monthly passes**

- Tickets will change to show the origin and destination zones rather than stations
- Tickets will be valid on more than one line
- Tickets with an origin or destination in zone 1 (Wellington Station) will allow free bus connections within zones 4 to 14 as shown on tickets
- The free bus connection rule will apply to child passes

### **Transfer ticket**

- Transfer tickets will be issued in conjunction with modified single trip and 10-trip tickets including the new 10-trip tickets for off-peak travel, tertiary students and blind and accessible concession
- In certain circumstances, and where necessary, the tickets may be issued in conjunction with occasional single or 10 trip tickets. However, this will need to be minimised by proper stock management
- Tickets will be valid for one transfer only on the same line and direction and for connection to the next available service, as current

### **Metlink Explorer tickets**

- The new Metlink Explorer passes will allow unlimited travel for one day after 9.00am on weekdays and all day on weekends and public holidays on all Metlink bus (including after midnight services) and Metlink rail services.

- The Metlink Explorer passes will not be valid on Ferry services.
- The day passes will allow the holder to take a child aged 5-15 for free.

GWRC will work with Transdev to confirm the changes to terms and conditions and develop detailed plan for implementation of the changes in time for their introduction in 2018.

### **Ticket stock management**

Stock management includes renewal, supply, administration and disposal (recycling) of tickets. The current conventional paper based ticketing system is expected to continue until start of IFT. Therefore, proper stock management will be required through various stages of transition.

Adequate quantities of the current tickets should be provided until mid-2018. Once a ticket is discontinued or replaced with a new or modified product, any surplus stock should be collected and disposed of from ticket offices and the retail network to minimise the potential for misuse.

Stock management of rail tickets should minimise the reliance and usage of occasional tickets.

GWRC will work with Transdev to design and print the modified and new tickets.

Some tickets such as the monthly passes with bus connections will require special design and colour coding to make it easier for both bus drivers and train staff to identify the tickets from other rail monthly passes, in order to reduce inspection time and the amount of interaction with customers.

### **Sales and validation of tickets**

The sales and validation involve selling tickets at ticket offices by Transdev staff or on-board the trains or by retailer across the retail network; checking passenger's eligibility and travel entitlements; and sighting, inspection and clipping of tickets. The rail staffs currently follow various instructions and operational guidelines and procedures (such as Transdev's ticketing sales manual) and sales aides (such as fare charts, zone charts, timetables etc.) for day to day administration of tickets and transactions at the point of sale, validate tickets and manage customer enquiries.

The change to products are expected to affect the sales and validation processes and will therefore require retraining of the staff at ticket offices and on-board the trains and communication of the changes to retail agents. Transdev will need to make sure the changes are updated in their ticketing sales and operational guidelines and the staff are trained to apply the new tickets.

GWRC needs to ensure network-wide consistency under the PTOM contracting environment. This consistency is expected to be partly achieved by standardisation of business rules and processes as well as operational tools. It is therefore important that the ticketing guides and manuals developed by PTOM operators under the partnering contracts conform to the industry best practice and business standards.

Changes to fare products will require the following changes to sales and validation of tickets:

- **For products to be discontinued**

The single-trip off-peak tickets will continue to be sold at ticket offices and on-board (using strip tickets) until the day when the new 10-trip off-peak tickets are introduced. After that, no single trip off-peak ticket should be sold or accepted.

If any discontinued ticket is presented on board the trains after the date on which the product is discontinued, the tickets will be accepted for a limited period of time after that date. Further details will be provided in an 'implementation plan'. Any claim for refund or exchange of a legacy ticket will need to be managed in accordance with the Metlink conditions for refund and exchange.

For school term passes and other repurchased period passes, Transdev should manage to stop selling the passes well in advance of the date on which they will be discontinued or replaced with a modified or new product (including monthly passes, school term passes and combined bus and rail passes). GWRC will work with Transdev to make appropriate changes to online sale of the monthly passes.

- **For products to be replaced with alternative products**

Current single-trip or return products and day passes will need to be issued (sold) and accepted until the day on which the product will be replaced with an alternative (or modified) product.

Transdev should manage to stop selling the 3-Day Weekend Rover tickets one week prior to introduction of the new Metlink Explorer tickets. Any residual tickets to be presented afterwards will be accepted for up to six months until they are completely run down.

After the 10-trip tickets are changed to zone-to-zone tickets, the station-based tickets will be accepted and may be exchanged with an equivalent zone-based ticket at ticket offices or on-board the trains for up to six months until they are completely run down.

The transition from current to new monthly passes should be managed in a way to reduce the overlap between administration (validation) of the old and new passes. The old monthly passes will be accepted for the months they are purchased for until completely run down after they are discontinued and replaced with the new passes.

The Monthly Plus tickets will need to continue until the last PTOM bus services commences in the areas where they are valid for.

## **Communication, marketing and customer service**

Communication is a critical element of the transition. All customers should be appropriately informed of the changes to products and fares prior to and in time for the changes. Appropriate timing for communication and the information content will vary depending on the product and availability of the substitutes or alternatives, the audience (market segment that will benefit or be disadvantaged by the changes), and their dependency on the affected products.

GWRC, in partnership with the PTOM operators including Transdev will develop and implement a fares and ticketing communication plan to ensure that customers will be informed of the changes in a timely manner prior to and through the course of the new fares initiatives such as new peak/off-peak, and concession fares, and changes to fare products and current ticketing systems.

A detailed implementation plan will identify requirements and actions for communication and marketing activities, including timing, resources, deliverables, roles and responsibilities, risks and mitigation measures.

New fares, concessions and products will generally require more time and resources to effectively communicate to customers. It may take some time for customers to be fully accustomed to the new fares and products and accept the changes. Therefore, communication may require marketing ambassadors in some areas or on some services to provide assistance to customers where needed.

To enable a consistent customer experience, the Metlink brand will appear on all Metlink fleet, front-line operator uniforms, signage, timetables, tickets and any other customer information material.

## **Refund and ticket exchange**

GWRC's refund and fare media exchange policy is provided in Appendix C. The PTOM operators will need to administer the policy as appropriate and will to make sure their staff will be sufficiently trained to apply the policies.

## **Data recording and reporting**

Transdev has obligations under the partnering contract to collect and report a variety of data, including patronage, revenue and fare evasions. GWRC is currently developing requirements for data management and analytics under PTOM contract through the interim bus ticketing solution and other Business Information Management Platforms. Any further changes to data collection, management and reporting will be communicated to Transdev and other PTOM operators.

Transdev will be required to review and update their data management system to incorporate the new fare products and other changes in their regular sales, transaction and revenue reports.

## **Revenue protection**

GWRC is currently developing a Revenue Protection Strategy – to help guide revenue protection activities for all modes. This will be appended to the FMTP once completed.

In the meantime, GWRC will continue to work with Transdev to develop appropriate procedures for managing miscellaneous products such as payment notices, complimentary tickets or vouchers, and administering refund and ticket exchange, revenue protection and conditions of carriage.

## Appendix A. Current and proposed fares

(to be applied from July 2018)

Number of zones	Current fares			Fares applicable from mid-2018				
	Adult	Child	Off-peak	Adult	Child	Off-peak	Tertiary student concession <sup>(a)</sup>	Accessible concession <sup>(b)</sup>
<b>Smartcard and 10-trip fares (per trip)</b>								
1	\$1.66	\$1.24	NA	\$1.71	\$0.86	\$1.28	\$1.28	\$0.86
2	\$2.73	\$1.59	NA	\$2.81	\$1.41	\$2.11	\$2.11	\$1.41
3	\$3.63	\$1.90	NA	\$3.74	\$1.87	\$2.81	\$2.81	\$1.87
4	\$4.08	\$2.33	NA	\$4.20	\$2.10	\$3.15	\$3.15	\$2.10
5	\$4.98	\$2.75	NA	\$5.13	\$2.57	\$3.85	\$3.85	\$2.57
6	\$6.33	\$3.17	NA	\$6.52	\$3.26	\$4.89	\$4.89	\$3.26
7	\$7.18	\$3.64	NA	\$7.40	\$3.70	\$5.55	\$5.55	\$3.70
8	\$8.03	\$4.08	NA	\$8.27	\$4.14	\$6.20	\$6.20	\$4.14
9	\$9.06	\$4.53	NA	\$9.33	\$4.67	\$7.00	\$7.00	\$4.67
10	\$9.96	\$4.98	NA	\$10.26	\$5.13	\$7.70	\$7.70	\$5.13
11	\$11.40	\$5.75	NA	\$11.74	\$5.87	\$8.81	\$8.81	\$5.87
12	\$12.25	\$6.15	NA	\$12.62	\$6.31	\$9.47	\$9.47	\$6.31
13	\$13.51	\$6.75	NA	\$13.92	\$6.96	\$10.44	\$10.44	\$6.96
14	\$14.40	\$7.20	NA	\$14.83	\$7.42	\$11.12	\$11.12	\$7.42
<b>Cash fares</b>								
1	\$2.00	\$1.50	\$2.00	\$2.50	\$1.50	NA	NA	NA
2	\$3.50	\$2.00	\$3.00	\$4.00	\$2.00	NA	NA	NA
3	\$5.00	\$2.50	\$4.00	\$5.00	\$2.50	NA	NA	NA
4	\$5.50	\$3.00	\$4.50	\$5.50	\$3.00	NA	NA	NA
5	\$6.50	\$3.50	\$5.00	\$6.50	\$3.50	NA	NA	NA
6	\$8.00	\$4.00	\$6.50	\$8.50	\$4.50	NA	NA	NA
7	\$9.00	\$5.00	\$7.50	\$9.50	\$5.00	NA	NA	NA
8	\$10.50	\$5.50	\$8.50	\$10.50	\$5.50	NA	NA	NA
9	\$11.50	\$6.00	\$9.50	\$12.00	\$6.00	NA	NA	NA
10	\$12.50	\$6.50	\$10.00	\$13.00	\$6.50	NA	NA	NA
11	\$14.50	\$7.50	\$14.50	\$15.00	\$7.50	NA	NA	NA
12	\$15.50	\$8.00	\$15.50	\$16.00	\$8.00	NA	NA	NA
13	\$17.00	\$9.00	\$17.00	\$17.50	\$9.00	NA	NA	NA
14	\$18.00	\$9.50	\$18.00	\$19.00	\$9.50	NA	NA	NA

<sup>(a)</sup> No current concession fare for tertiary student

<sup>(b)</sup> Current concession fares for blind and IHC on rail network are variable as shown in the following table:

Current targeted concession fares (Rail)	Number of zones													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
<b>Blind person (single)</b>														
Blind person travelling alone or accompanied by guide dog	\$1.00	\$2.00	\$2.50	\$3.00	\$3.50	\$4.00	\$4.50	\$5.50	\$6.00	\$6.50	\$7.50	\$8.00	\$8.50	\$9.00
Blind person with an accompanying attendant (adult or child)	\$2.00	\$3.50	\$5.00	\$5.50	\$6.50	\$8.00	\$9.00	\$10.50	\$11.50	\$12.50	\$14.50	\$15.50	\$17.00	\$18.00
Blind person with an accompanying attendant and guide dog	\$3.00	\$5.50	\$7.50	\$8.50	\$10.00	\$12.00	\$13.50	\$16.00	\$17.50	\$19.00	\$22.00	\$23.50	\$25.50	\$27.00
<b>Blind person (10-trip)</b>														
Blind person travelling alone or accompanied by a guide dog only	\$8.30	\$13.70	\$18.20	\$20.40	\$24.90	\$31.70	\$35.90	\$40.20	\$45.30	\$49.80	\$57.00	\$61.30	\$67.60	\$72.00
<b>IHC person (single)</b>														
IHC person (10-trip)	\$15.00	\$20.00	\$25.00	\$30.00	\$35.00	\$40.00	\$50.00	\$55.00	\$60.00	\$65.00	\$75.00	\$80.00	\$90.00	\$95.00



## Monthly passes

Number of zones	Current fares		Fares to be applied from mid-2018	
	Adult	Child	Adult	Child
1	\$49.80	\$37.20	\$51.30	\$25.80
2	\$81.90	\$47.70	\$84.30	\$42.30
3	\$108.90	\$57.00	\$112.20	\$56.10
4	\$122.40	\$69.90	\$126.00	\$63.00
5	\$149.40	\$82.50	\$153.90	\$77.10
6	\$189.90	\$95.10	\$195.60	\$97.80
7	\$215.40	\$109.20	\$222.00	\$111.00
8	\$240.90	\$122.40	\$248.10	\$124.20
9	\$271.80	\$135.90	\$279.90	\$140.10
10	\$298.80	\$149.40	\$307.80	\$153.90
11	\$342.00	\$172.50	\$352.20	\$176.10
12	\$367.50	\$184.50	\$378.60	\$189.30
13	\$405.30	\$202.50	\$417.60	\$208.80
14	\$432.00	\$216.00	\$444.90	\$222.60

## Day passes

Fare product	Fare
<b>Current products</b>	
Day Rover	\$14.00
Adult Wairarapa Day Excursion	\$22.00
Child Wairarapa Day Excursion	\$11.00
3 Day Weekend Rover	\$21.00
Metlink Explorer	\$21.00
<b>Products to replace the current day passes from start of IBTS or mid-2018</b>	
Metlink Explorer day pass - zones 1-3	\$10.00
Metlink Explorer day pass - zones 1-7	\$15.00
Metlink Explorer day pass - zones 1-10	\$20.00
Metlink Explorer day pass - zones 1-14	\$25.00

## Kapiti combo tickets

Fare product	Current fare	Fares from mid-2018
Waikanae bus/train combo – 2 zones	\$7.00	\$7.00
Otaki bus/train combo – 5 zones	\$12.00	\$12.00

## Rail event tickets

Fare product	Current fare	Fares from mid-2018
Wellington Event Ticket – Hutt/Kapiti Adult Single	\$6.00	\$8.00
Wellington Event Ticket – Hutt/Kapiti Child Single (half adult fare)	\$3.00	\$4.00
Wellington Event Ticket – Johnsonville Adult Single	\$4.00	\$4.00
Wellington Event Ticket – Johnsonville Child Single (half adult fare)	\$2.00	\$2.00
Wellington Event Ticket – Hutt/Kapiti Adult Return	\$12.00	\$16.00
Wellington Event Ticket – Hutt/Kapiti Child Return (half adult fare)	\$6.00	\$8.00
Wellington Event Ticket – Johnsonville Adult Return	\$8.00	\$8.00
Wellington Event Ticket – Johnsonville Child Return (half adult fare)	\$4.00	\$4.00

## Wairarapa Line minimum fares

Fare product	Current fare	Fares from mid-2018
Minimum fare – 8 zones	Varies	Varies
Surcharge on peak outbound services for 4-6 zones 10-trip tickets and monthly passes	\$5.00	\$5.00
Surcharge on peak outbound services for 7 zones 10-trip tickets and monthly passes	\$1.00	\$1.00

**Appendix B. Metlink Fare Rules Manual**

**Appendix C. Metlink Conditions of Carriage**

**Appendix D. Implementation of SuperGold scheme**

**Appendix E. Metlink refund and exchange policy**

**Appendix F. Revenue Protection Strategy**