

Waikato Regional Council
Hamilton to Auckland Public
Transport Travel Demand Scoping
Final Report

Research and Strategy Ltd.



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1: Executive Summary

1.1 Background and objectives

Mobius was asked to explore the likely demand level for a 'connection service' between Waikato and Auckland with people aged 16 years and older, who travel to Auckland once or more per month and who reside in the Hamilton City, Waikato District or Waipa District Council catchment areas. This was to inform a Strategic Business Case being lead by the Waikato Regional Council on behalf of a Working Party of wider stakeholders.

To date, possible patronage estimates have been based on existing data. However none of this data relates to regional (within the Waikato) residents' actual likely uptake of such a service or which service options (and on-board services) they would prefer. Furthermore, these estimates have mostly focused on commuters only, but other information indicates that a significant proportion of possible demand for such a service may come from non-commuters.

As part of the project, Mobius explored likely service demand levels across the wider Waikato area with both commuters and non-commuters i.e. people not travelling at peak times for work/business related reasons. Demand was also explored with regards to three potential Service Options – and for a range of ticket price levels.

1.2 Approach

This was a mixed method project comprising an online survey with a subset of the public who travel between Waikato and Auckland, and in-depth interviews with major Waikato-based employers. The people surveyed were a subset of people who live across the three geographical areas identified above and who travel between Waikato and Auckland at least once a year – although the Service Options were only explored with participants who make the journey once or more a month.

While N=1,104 commenced the survey (i.e. they make the trip at least once a year) approximately n=500 (depending on the question answered) participants make the journey once or more a month. The larger sample were asked general travel behaviour questions, while the specific Service Option questions including with regards to potential demand were only asked of those who make the journey at least once a month.

Interviews were also conducted with representatives of 18 Waikato-based organisations. The purpose of these interviews was to understand the extent to which staff at these organisations commute between Waikato and Auckland on a regular basis, and subsequently to identify the level of interest in a public transport commuter service. Interviews varied in length depending on the extent of staff commuting and the relevance of a public transport commuter service.

1.3 Summary of key findings

The key findings from the research are that:

1. There is demand for a public transport commuter service between Waikato and Auckland

Across the total sample of N=1,104 – 48.7% are travelling between Waikato and Auckland at least once a month

- Of those travelling at least once a month (N=537, NB: not everyone answered every question), 16.6% are making the journey at least 3 times a week and 34.7% are making the journey at least once a week
 - The number of journeys between Waikato and Auckland (among those who make the journey at least once a month) equates to approximately **646 journeys per week**
 - 61% of people making the journey at least once a month are willing to consider public transport as an alternative means of travelling between Waikato and Auckland (these people gave a willingness to consider score of 7 or higher out of 10)
 - 41% rated their willingness to consider a public transport commuter service at 9 or 10 out of 10
2. Most people travelling between Waikato and Auckland are not commuters but are travelling for other reasons (NB: participants could choose more than one reason)
 - 35% are travelling for meetings in the Auckland area and 19.1% live in the Waikato area but work or mainly work in the Auckland area
 - 57.6% are visiting friends and family
 - 42.4% are travelling to the airport
 - 39.4% are travelling for entertainment or other social activities
 3. Most people making the trip are not in single-occupancy vehicles – 47.2% often, and 30.4% sometimes travel with passengers. This may have some implications for the relative (to public transport) ‘per passenger’ cost of travel and therefore the potential uptake of a new public transport offer
 4. Demand is highest for Service Option 1, i.e. the option with the ‘higher’ specification levels – and quite a lot lower for the third Service Option (2A). Most people rejected the idea of bus travel (to Papakura) because they would still be on the road and were concerned about the travel time (which was presented as being **up to 2 hours and 45 minutes**)
 5. Demand for each of the service options is indicated to be quite price elastic
 6. While price is indicated to be important however, cost savings are not the main ‘driver’ of potential demand. Instead the key drivers are linked to reducing stress and ‘at the wheel’ time. This was supported by feedback from Fonterra who reported health and safety, and the well-being of commuters as key organisational concerns
 7. There is relatively low tolerance for variation in ‘arrival time’ of any offer i.e. it running late – especially beyond thirty minutes late
 8. There are some opportunities to secure large organisational partners to support the potential uptake of a new service offer.

The results of the survey indicate that there would be demand for a public transport connection service between Waikato and Auckland – especially for Service Option 1 and, to a lesser extent, Service Option 2. Indicative uptake for the third potential Service Option (Service Option 2A) is much lower than for the other two. Important to the actual level of demand will be the ticket pricing. However, the fact that most of the journeys made are not for ‘business’/work purposes but also that most vehicles have more than one occupant (and in many cases more than two passengers) needs to be taken into account in regards to both timing of any service(s) and also potential demand levels.

2: Project Background and Objectives

Waikato Regional Council is part of a Working Party (consisting of a range of public and private sector organisations) that is investigating the possibility of introducing a dedicated public transport connection between the Waikato and Auckland regions. To date, possible patronage estimates have been based on existing data. However none of this data relates to regional (within the Waikato) residents' actual likely uptake of such a service or which service options (and on-board services) they would prefer. Furthermore, these estimates have mostly focused on commuters only, but other information indicates that a significant proportion of possible demand for such a service may come from non-commuters.

To inform a Strategic Business Case for the possible transport connection, the Working Party tasked Waikato Regional Council with undertaking research to assess likely user demand as well as identify service option preferences. The Waikato Regional Council's project team contracted Mobius to undertake research to inform the demand analysis – around three potential Service Options.

Mobius explored the likely demand level for a 'connection service' with people aged 16 years and older who travel to Auckland once or more per month and who reside in the Hamilton City, Waikato District or Waipa District Council catchment areas. The specific objectives were to:

1. Identify what proportion of current commuters and also non-commuters surveyed who travel from Waikato to Auckland once or more per month (by privately owned or company vehicle) would make the trip on a public transport connection service – if it was available
2. Identify which on-board services are 'must haves', which are 'nice to haves' and which are not needed at all
3. Identify the highest price point/range they would be willing to pay that would have no negative impact on their likelihood to use the service or their frequency of use
4. Identify the barriers to uptake of the service
5. Explore perceptions around costs associated with their current Waikato-Auckland travel.

A secondary project component (and target audience) related to large Waikato organisations. The main project objective with regards to these organisations was to identify the level of interest in the overall offer as well as in the specific Service Options.

This report outlines the findings from this research.




3: Approach

This was a mixed method project comprising an online survey of a subset of the public who travel between Waikato and Auckland and interviews with major Waikato-based employers.

3.1 Online survey

The public survey was approximately 12 minutes in duration and conducted with N=537 participants who commute from Waikato to Auckland at least once a month. The initial travel-related questions were asked of a wider range of participants, being up to N=1,104 people for the first survey question. Participants were sourced from Mobius' online research panel and also via the Neighbourly Community panel (owned by Fairfax Media). It should be noted that participants from Mobius' panel did not initially know what the survey was about, while participants from Neighbourly knew that the survey was about a potential new public transport offer between Waikato and Auckland. This said, there were no statistically significant differences between the results of the two sample sub-sets.

Participants were from the following Council areas:

Council area	20%	40%	60%	80%	100%	Percentage	N=807
The Hamilton City Council area						64.6%	521
The Waikato District Council area						24.9%	201
The Waipa District Council area						10.5%	85

Those living in the Waikato District Council area live in the following town or urban areas:

Waikato District Council	N=197 %
Horotiu	5.1
Huntly	11.2
Ngaruawahia	7.6
Pokeno	6.1
Port Waikato	0
Raglan	2.0
Tamahere	10.7
Taupiri	2.5
Te Kauwhata	4.1
Tuakau	6.6
Somewhere else	44.2

Participants from the Waipa District Council area live in the following town or urban areas:

Waipa District Council	N=197 %
Cambridge	5.1
Ohaupo	11.2
Pirongia	7.6
Te Awamutu	6.1
Somewhere else	44.2

3.2 In-depth interviews

In-depth interviews were conducted with representatives of 18 Waikato-based organisations. The purpose of these interviews was to understand the extent to which staff at these organisations commute between Waikato and Auckland on a regular basis, and subsequently to identify the level of interest in a public transport commuter service. Interviews varied in length depending on the extent of staff commuting and the relevance of a public transport commuter service.

4: Current travel behaviour and interest in a commuter service – participants travelling at least once a year

Section Four provides an overview of the travel behaviour of, and interest in a public transport commuter service among participants who travel between Waikato and Auckland **at least once a year**.

4.1 Last 12 months – average travel between Waikato and Auckland

Participants in the Hamilton City Council, Waikato District Council and Waipa District Council areas who travel between Waikato and Auckland **at least once a year** were asked how often they have made the journey in the last 12 months.

- 16.9% have travelled between Waikato and Auckland at least once a week
- 26.9% are travelling at least once every two weeks
- 48.7% are travelling at least once a month.

Average travel between Waikato and Auckland last 12 months	20%	40%	60%	80%	100%	Percentage	N=1,104
At least 5 times a week						4.7%	52
At least 3-4 times a week						3.4%	37
At least 1-2 times a week						8.8%	97
At least once every 2 weeks						10.0%	110
At least once a month						21.8%	241
Once every 2-3 months						27.9%	308
Once every 4-12 months						23.5%	259

4.2 Main reasons for travel between Waikato and Auckland

More than half of participants (57.2%) make the trip to visit friends and family, while just under half (48.2%) are travelling to Auckland airport for either domestic or international travel. Just under one third travel to Auckland for meetings, although a relatively low proportion are working in Auckland:

- 30.1% are **travelling for meetings** in the Auckland area, and
- 13.2% **live in the Waikato area but work or mainly work in the Auckland area.**

Main reasons for travel	20%	40%	60%	80%	100%	Percentage	N=797
I work or mainly work in the Auckland area (but live in the Waikato area)						13.2%	105
I attend meetings in the Auckland area but am not based there						30.1%	240
I study in the Auckland area						2.1%	17
For entertainment/other social activities						39.5%	315
To visit friends and family						57.2%	456
To get to the airport for travel (domestic or international)						48.2%	384
For expert services provided in Auckland (e.g. professional services, healthcare etc.)						8.8%	70
To go shopping						23.5%	187
Other reasons						6.8%	54

Note that this was a multiple response question.

4.3 Transport modes and extent of single occupancy vehicle usage

4.3.1 Main and other modes of transport used

The majority of participants (78.1%) make the trip by a private car, truck or van.

Main mode of transport	20%	40%	60%	80%	100%	Percentage	N=754
Private car, truck or van						78.1%	589
Company car, truck or van						11.0%	83
Passenger in a car, truck or van						4.2%	32
Company bus (bus provided by the company you work for)						0.4%	3
Commercial bus e.g. Intercity, Mana Bus						3.3%	25
Motorcycle or power cycle						0.8%	6
A combination of these each time e.g. car for part of the way, then bus or train etc.						1.2%	9
Other						0.9%	7

Of these, 46.2% use **no other mode of transport** when travelling between Waikato and Auckland. Those that do use another (second) mode of transport at least sometimes (n=388) also travel, at times, via the following:

- 45.4% are using a private car, truck or van
- 35.8% are a passenger in a car, truck or van
- 25% are using a commercial bus (e.g. Intercity, Mana Bus)
- 17.8% are using a company car, truck or van
- 5.4% are using a combination of different modes
- 5.2% are using a motorcycle or powercycle
- 2.5% are using a company bus.

4.3.2 Frequency of travel with passengers vs. single occupancy vehicles

Participants travelling in a **private or company car, truck or van** were asked if they ever travel with passengers.

80.8% are either 'often' or 'sometimes' travelling with passengers with half (50.4%) stating that they often travel with passengers.

Frequency of travelling with passengers	20%	40%	60%	80%	100%	Percentage	N=670
Often						50.4%	338
Sometimes						30.4%	204
Rarely/never						19.1%	128

4.3.3 Number of passengers

Of the 80.8% who often or sometimes travel with passengers:

- 46.8% are mainly travelling with one passenger
- 72.9% are travelling with one or two passengers
- 19.8% are travelling with three or more passengers.

Number of passengers	20%	40%	60%	80%	100%	Percentage	N=541
1 passenger						46.8%	253
2						26.1%	141
3						15.7%	85
4 or more passengers						4.1%	22
It varies						7.4%	40

4.4 Estimated cost of travel between Waikato and Auckland

Participants were asked to estimate the cost of travel one-way between Waikato and Auckland. It should be noted that most people underestimated the cost. This may have an impact on potential demand for a public transport service and what participants are prepared to pay for it – unless they are made aware of the actual cost of travel by private vehicle that is.

Estimated cost of one-way travel	20%	40%	60%	80%	100%	Percentage	N=718
Under \$10 each way						2.4%	17
Between \$10 and \$15 each way						8.9%	64
Between \$16 and \$20 each way						15.5%	111
Between \$21 and \$25 each way						17.1%	123
Between \$26 and \$30 each way						14.3%	103
Between \$31 and \$35 each way						8.5%	61
Between \$36 and \$40 each way						9.3%	67
More than \$40 each way						12.3%	88
I am unsure						11.7%	84

4.5 Extent of public transport use in Waikato

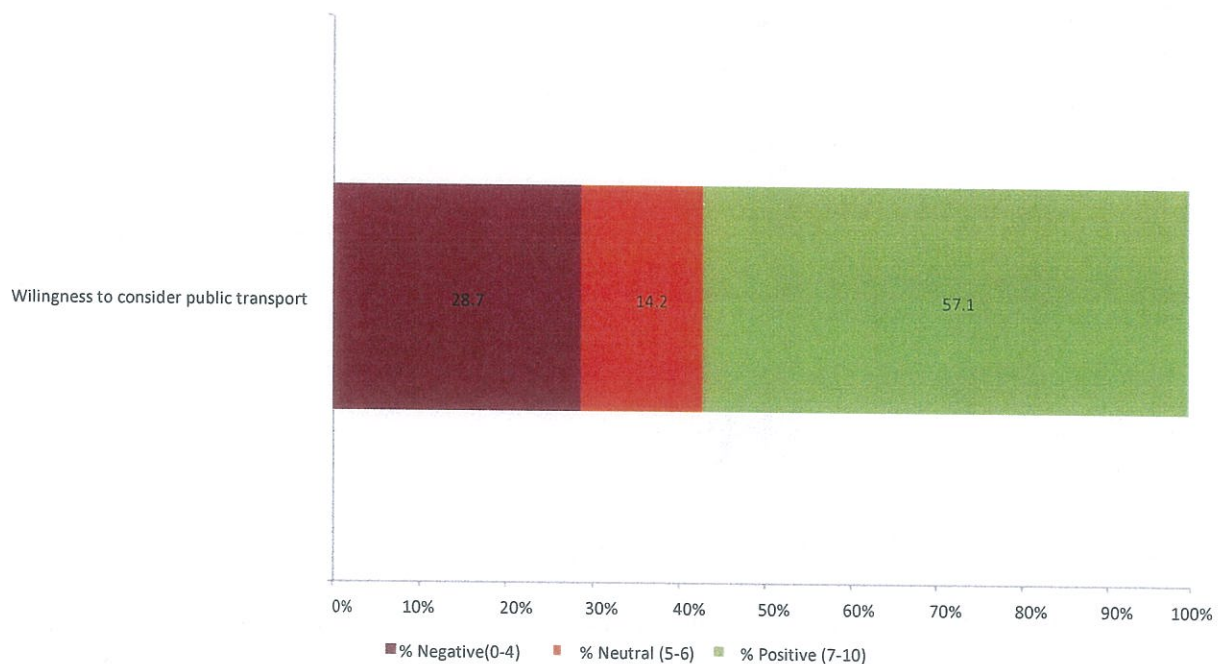
Participants who travel at least once a year between Waikato and Auckland were asked about the extent of their public transport usage in (and around) Waikato. Most (79.8%) are **not using public transport** either 'regularly' or 'sometimes' within the Waikato area at the moment.

Use of public transport in and around Waikato	20%	40%	60%	80%	100%	Percentage	N=718
Often/regularly						6.5%	47
Sometimes						13.6%	98
Not often						18.5%	133
Never/rarely						61.3%	440

4.6 Willingness to consider public transport as an alternative means of travelling between Waikato and Auckland

Participants who travel between Waikato and Auckland **at least once a year** were then asked how willing they would be to consider public transport as an alternative means of travelling between Waikato and Auckland, if the travel timetable was good, the quality of the service high and the price was acceptable to them.

57.1% of participants rated the likelihood that they would use the service at 70% or higher while almost half (47.6%) rated this as 80% or higher – and over one third of participants rated their likelihood of utilising the service at 90% or higher.



Participants were also asked to provide a reason for their answer – in regards to the likelihood that they would utilise the service.

Examples of reasons for scores of 40% or below (low willingness to consider):

Key themes:

- People needing a car while they are in Auckland – travelling to different destinations in Auckland
- None of the arrival destinations in Auckland being convenient e.g. people needing to travel to the North Shore
- People travelling with children, or needing their own vehicle to transport specific items
- Departure times (at either end) not being suitable
- Having to use public transport while in Auckland.

- Because I still need to travel around once I get there
- Because I mainly travel to the North Shore and as a recent refugee I know public transport to the North Shore would not be suitable for us. However I do believe public transport between Waikato and Auckland could be greatly improved and who knows in the future we may need to use it
- I travel for work and am on a roster, which changes each time I work. I cannot be late as I am a pilot and this would cause big problems for many people
- I often have appointments within other areas of Auckland during the day
- I do not believe public transport will ever get me direct to my destinations, I would be reliant on further transport such as taxi or family to pick up and drop off from bus depot etc.
- Convenience and efficiency. There is no way that my type of travel would ever fit into 'usual' commuter travel services
- I have two children and it's difficult to transport car seats for use while I am in Auckland if I haven't come in my car
- Because with the public transport in Auckland I would not be able to tow a trailer or transport items required to and from Auckland to Hamilton. Also it is not as convenient as a car and you would have to mix with people
- Only my ute can carry the large heavy range of tools I need to do my job and need them with me where-ever I go
- Prefer to travel in car
- Because there is no direct public transport links to where my family lives and it would take longer to get a train/bus, then another bus, and in the case of my sister, she would then need to collect me from the bus stop which is a 30 minute drive from her house with no public transport link
- I take my two dogs with me
- Recreation and shopping so need car to move venue to venue. Would be different if working in Auckland and a single destination
- Not door to door. Would need to drive to Frankton and then get to where I want to go in Auckland and all in reverse
- My work and home are both at least 30 minutes walk from the nearest public transport hubs. The only way around that would be buying a second car so I could keep at each end
- Normally come back late, trains not likely to have a wide flexible schedule. Also tend to go to multiple places when in Auckland
- Because I would have to get off at a station/ stop, then get more public transport to where I would want to go, this would be too time consuming
- If just for work then 10, but the amount of time I have after work and going to training will not be enough without own vehicle
- I want to be independent when I arrive in Auckland not waiting for more public transport
- I'd prefer to go straight to my destination and have the privacy of being in my car. Plus I can stop at places on the way up and I'd need a car for getting around
- I don't mind driving and also I have a company car so it costs me nothing
- I quite often need to be flexible with times arriving and leaving Auckland, with limited notice. I would prefer to drive myself, but can definitely see the benefit of a quality rail link

Examples of reasons for scores of 70% or higher (high to very high willingness to consider):

Key themes:

- Wasting time/feeling frustrated sitting in traffic jams
- Not having to depart so early from Waikato
- Feeling more relaxed/less stressed.

- I'm assuming I wouldn't have to run to work when I get there and it's cheaper than my car approx. \$90. Even better, if it's one single transport only from home to work - single route. Would defeat the purpose if I have to catch 2 transports (buses) to and from work
- Sitting in a traffic jam in Auckland is a waste of life. We need multiple transport options to remove congestion. Railway is a no-brainer, but it needs to be clean, reliable and affordable. Having used the Wellington trains, I have to say they had reliability issues, and became unaffordable with the lack of sufficient state involvement. I left Wellington because of their transport and infrastructure issues
- Parking in Auckland is a nightmare. However the places we go would not have public transport connections so getting around once in Auckland could be challenging. Also if we are collecting supplies it would be difficult to carry them with us
- We don't have to drive and get tired instead just relax by travelling in train
- Cost of petrol
- Hate sitting in traffic jam
- Depending which part of Auckland I am going to. If CBD yes, if North Shore maybe not
- If it was regular and comfortable I would love to take the stress out of the trip
- So I can be productive during the trip and save on parking
- Using public transport allows me to use the time to do some work or to relax. I occasionally use the InterCity bus from Waihi to Auckland and while in Auckland I use public transport as often as possible as I find it more relaxing but this is not always possible if the area I need to go isn't well served by buses/trains
- If I could do work during the trip (wireless was available) then I could make better use of the time
- If there was a train service from central Hamilton to central Auckland that went at appropriate times and didn't take too long I would definitely consider this as an alternative to driving
- It would be great to have a train running into the Auckland central city regularly and at times that enabled a person to arrive in the city say 9.00 am and spend the day in Auckland returning to the Waikato late afternoon
- I have travelled to Auckland CBD by driving to Papakura train station and then hoping on the train. I have always enjoyed this journey and find it fairly convenient, Unfortunately, I usually travel up in a group and for 4/5 people it is quite expensive to do this
- I commuted to Auckland every day for 4 months and it nearly killed me. Driving to Papakura to get the train would not get me to work on time and would double my travel time. Instead, I woke at 5am, left home at 5.30 to beat the traffic to get to downtown Auckland viaduct by 9am. I spent 5 hours in the car every day. I hated it. I quit my job after 4 months it was THAT insufferable. A train would have been great. Now, if I'm travelling it's with the kids and a train would work for some trips, but not all of them. I'd still give it a go though. And it would open up my work opportunities into Auckland again
- You have to leave so early in the morning from Hamilton for a 9am meeting! Would much prefer to use a train, they would have to run on a regular basis not just once a day in each direction
- Driving at peak times is very frustrating and a waste of time. It would be great to travel by train. It would be a lot more relaxing
- Don't like sitting in traffic for long periods. I like the fact you know what your time frame is when using public transport. Less stress

-
- To make meetings, training say by 8:30am means getting up at 5am anticipating the worst travel time. This makes for a very long day and driving back in peak hour traffic means I would get home anywhere between 6.30 and 8pm. At times I have to pull over to briefly rest. To be able to catch the train and snooze or relax would be great and no parking issues on the other end. Also reduce wear and tear and mileage on the car. Would have to have more than one departure and return both ways unlike Capital Connection, which is too inflexible especially when wanting to travel Wgtn to PN
 - I spend an average of 3 hours plus a day driving to and fro. If there was a train e.g. I could use this time more productively by catching up on calls or emails, thus reducing working hours in the office. I wouldn't suffer from drive fatigue so much. I believe fewer road accidents would be a factor too. Especially on the Southern motorway
 - Absolutely hate sitting on the motorway crawling through traffic for a trip that should only take 1.5hrs for the distance covered. I also regularly travel to Tauranga and Rotorua and virtually every trip is less than 1.5hours. It's so frustrating to have so much dead time wasted in the traffic and often becomes a wellbeing issue due to fatigue because of long days related to the travel either side of work days in Auckland
 - Getting to Auckland for a 9am meeting is a nightmare. I use buses when I can but it's not always the most practicable option and I have had variable experience with them. 5 years ago I was travelling to Auckland CBD weekly and I had experiences of the bus taking 4 hours, being very late or not turning up at all. I would DEFINITELY use a train to go to the Auckland CBD
 - My husband is looking for work in Auckland and the convenience of a train would mean that both he and I, when I go, can get a head start on work, it will be quicker also as not delays due to traffic issues

4.7 Main benefits of using public transport to travel between Waikato and Auckland

Of the participants who travel between Waikato and Auckland at least once a year, **12.9% did not think there**

would be any benefits to them personally using public transport to make the trip. Among those that thought

there would be a benefit, they see the benefits (prompted) as being:

Benefits of using public transport to travel between Waikato and Auckland	Percentage
It would be less stressful than driving	23.0%
I would not be sitting in traffic	17.5%
It would be cheaper than using a car	14.5%
I could do other things on the journey	13.6%
I would not have to worry about parking	11.6%
It would be better for the environment	10.1%
It would be safer	9.8%

5: Current travel behaviour and interest in a commuter service – participants travelling at least once a month

Section Five provides an overview of the travel behaviour of, and interest in a public transport commuter service amongst participants who travel between the Waikato and Auckland at least once a month.

5.1 Last 12 months travel between Waikato and Auckland

Participants in the Hamilton City Council, Waikato District Council and Waipa District Council areas who travel between Waikato and Auckland at least once a month were asked how often they have made the journey in the last 12 months. **16.6% stated that they are travelling between Waikato and Auckland at least three times a week and 34.7% are making the trip at least weekly.**

The number of trips between Waikato and Auckland by the participants who make the trip at least once per month translates into approximately n=646 journeys per week.

Average travel between Waikato and Auckland each month	20%	40%	60%	80%	100%	Percentage	N=537
At least 5 times a week						9.7%	52
At least 3-4 times a week						6.9%	37
At least 1-2 times a week						18.1%	97
At least once every 2 weeks						20.5%	110
At least once a month						44.9%	241

5.2 Main reasons for travel between Waikato and Auckland

More than half (57.6%) of the participants who make the trip at least once a month are travelling to visit friends and family, while just under half (42.4%) are travelling to Auckland airport for either domestic or international travel.

- 35% are travelling for meetings in the Auckland area, and
- 19.1% live in the Waikato area but work or mainly work in the Auckland area.

Main reasons for travel	20%	40%	60%	80%	100%	Percentage	N=528
I work or mainly work in the Auckland area (but live in the Waikato area)						19.1%	101
I attend meetings in the Auckland area but am not based there						35.0%	185
I study in the Auckland area						3.0%	16
For entertainment/other social activities						39.4%	208
To visit friends and family						57.6%	304
To get to the airport for travel (domestic or international)						42.4%	224
For expert services provided in Auckland (e.g. professional services, healthcare etc.)						10.2%	54
To go shopping						24.1%	127
Other reasons						7.2%	38

5.3 Transport modes and extent of single occupancy vehicle usage

5.3.1 Main and other modes of transport used

The majority of participants (77.8%) who make the trip at least once a month are travelling by private car, truck or van.

Main mode of transport	20 %	40%	60%	80%	100%	Frequency	N=499
Private car, truck or van						77.8%	388
Company car, truck or van						12.6%	63
Passenger in a car, truck or van						4.0%	20
Company bus (bus provided by the company you work for)						0.2%	1
Commercial bus e.g. Intercity, Mana Bus						2.6%	13
Motorcycle or power cycle						0.6%	3
A combination of these each time e.g. car for part of the way, then bus or train etc. – please tell us what you do						1.6%	8
Other						0.6%	3

Of these, 44.9% use **no other mode of transport** when travelling between the Waikato and Auckland. Those that do use another (second) mode of transport at least sometimes (n=267) also travel, at times, via the following:

- 46.8% are using a private car, truck or van
- 34.4% are a passenger in a car, truck or van
- 28.8% are using a commercial bus (e.g. Intercity, Mana Bus)
- 18.3% are using a company car, truck or van
- 7.1% are using a combination of different modes
- 6.0% are using a motorcycle or powercycle
- 1.9% are using a company bus.

5.3.2 Extent of travel with passengers vs. single occupancy vehicles

Participants travelling between Waikato and Auckland by either **private or company** car, truck or van were asked if they ever make the journey with passengers. **77.6%** are ‘often’ or ‘sometimes’ travelling with passengers, with just under half (**47.2%**) ‘often’ travelling with passengers.

It should be noted that a relatively low proportion of participants travelling from Waikato to Auckland are travelling in single occupancy vehicles. This may have some implications for the relative (to public transport) ‘per passenger’ cost of travel and therefore potential uptake of a new public transport offer.

Frequency of travelling with passengers	20%	40%	60%	80%	100%	Percentage	N=451
Often						47.2%	213
Sometimes						30.4%	137
Rarely/never						22.4%	101

5.3.3 Number of passengers in a vehicle

Of the 77.6% of participants who make the trip often or sometimes travel with passengers:










- 49% are mainly travelling with one passenger
- 73.4% are travelling with one or two passengers
- 21.2% are travelling with three or more passengers.

Number of passengers	20%	40%	60%	80%	100%	Frequency	N=349
1 passenger						49.0%	171
2						24.4%	85
3						16.9%	59
4 or more passengers						4.3%	15
It varies						5.4%	19

Note that the potential impact of most trips being made as multiple -occupant journeys (including where there are more than two people per vehicle) should be taken into account when considering potential demand for a public transport option – and also when considering the pricing for such an option.

5.4 Estimated cost of travel between Waikato and Auckland

Participants who make the journey once or more per month were asked to estimate the cost of travel one-way between Waikato and Auckland. Once again, **it should be noted that they underestimated the cost. This may have an impact on potential demand for a public transport service and what people are prepared to pay for it – unless they are made aware of the actual cost of travel by private vehicle that is. This is especially so when combined with the fact that a large proportion of trips are not made in single-occupancy vehicles.**

Estimated cost of one-way travel	20%	40%	60%	80%	100%	Frequency	N=484
Under \$10 each way						2.1%	10
Between \$10 and \$15 each way						11.0%	53
Between \$16 and \$20 each way						13.4%	65
Between \$21 and \$25 each way						17.6%	85
Between \$26 and \$30 each way						14.7%	71
Between \$31 and \$35 each way						7.6%	37
Between \$36 and \$40 each way						10.3%	50
More than \$40 each way						12.8%	62
I am unsure						10.5%	51

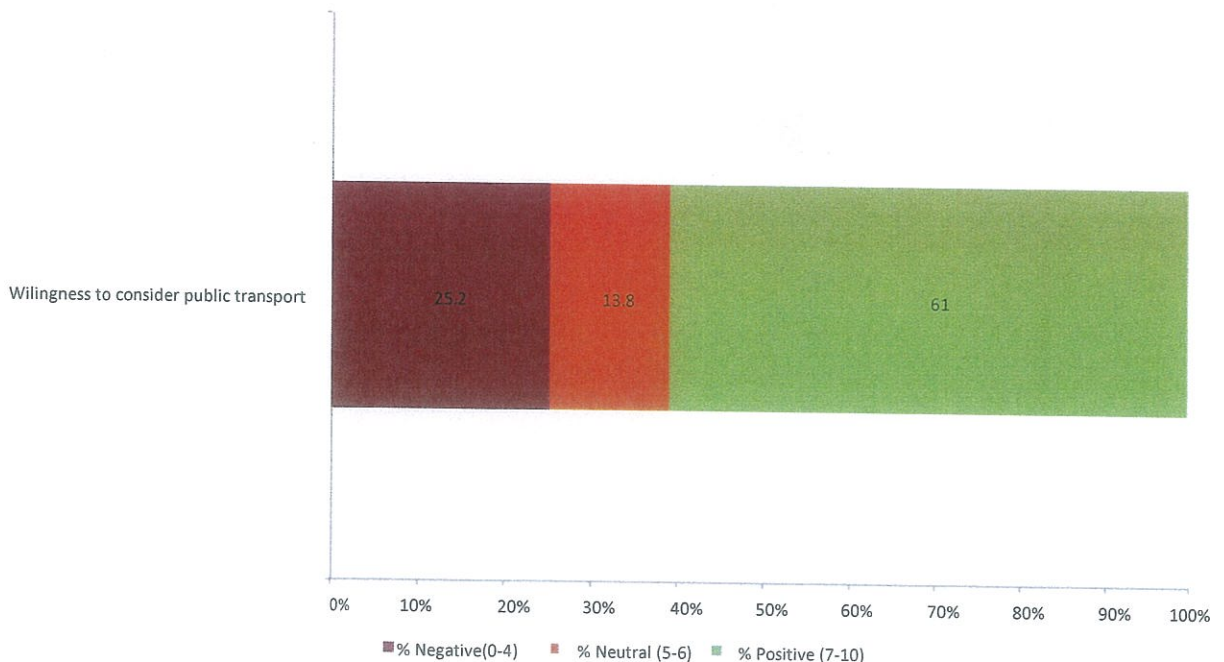
5.5 Extent of public transport use in Waikato

Participants who travel at least once a month between Waikato and Auckland were also asked about the extent of their public transport usage in (and around) Waikato. Most (77.1 %) are **not using public transport** either 'regularly' or 'sometimes within the Waikato area.

Response	20%	40%	60%	80%	100%	Frequency	N=484
Often/regularly						7.0%	34
Sometimes						15.9%	77
Not often						20.5%	99
Never/rarely						56.6%	274

5.6 Willingness to consider public transport as an alternative means of travelling between Waikato and Auckland

Participants who travel between Waikato and Auckland **at least once a month** were asked how willing they would be to consider public transport as an alternative means of making the trip if the travel timetable was good, the quality of the service high and the price was acceptable to them. **61% of participants rated the likelihood that they would use the service at 70% or higher while just over half (51.7%) rated this as 80% or higher – and 41% of participants rated their likelihood of utilising the service at 90% or higher.** Note that this is without them having any other information such as departure or arrival times and locations or fares.



5.7 Main benefits of using public transport to travel between Waikato and Auckland

Of the participants who travel between Waikato and Auckland at least once a year, **would be any benefits to them personally using public transport to make the trip.** there would be a benefit, they see the benefits (prompted) as being: **10.4% did not think there** Among those that thought

Benefit	Percentage
It would be less stressful than driving	22.7%
I would not be sitting in traffic	16.7%
It would be cheaper than using a car	14.8%
I could do other things on the journey	14.8%
I would not have to worry about parking	11.4%
It would be better for the environment	10.0%
It would be safer	9.6%

Saving personal energy, being less stressed and being able to make better use of time (in addition to potential cost savings) are some of the 'hot buttons' that could be used for promoting a public transport offer. Additional unprompted benefits that participants identified are outlined in Sections 4.6 (above) and 6.1.1 (below) of this report via some of the exemplar verbatim comments they made.

6: Service options

6.1 Option 1: A limited stops express rail service from Hamilton to Auckland

Option 1:

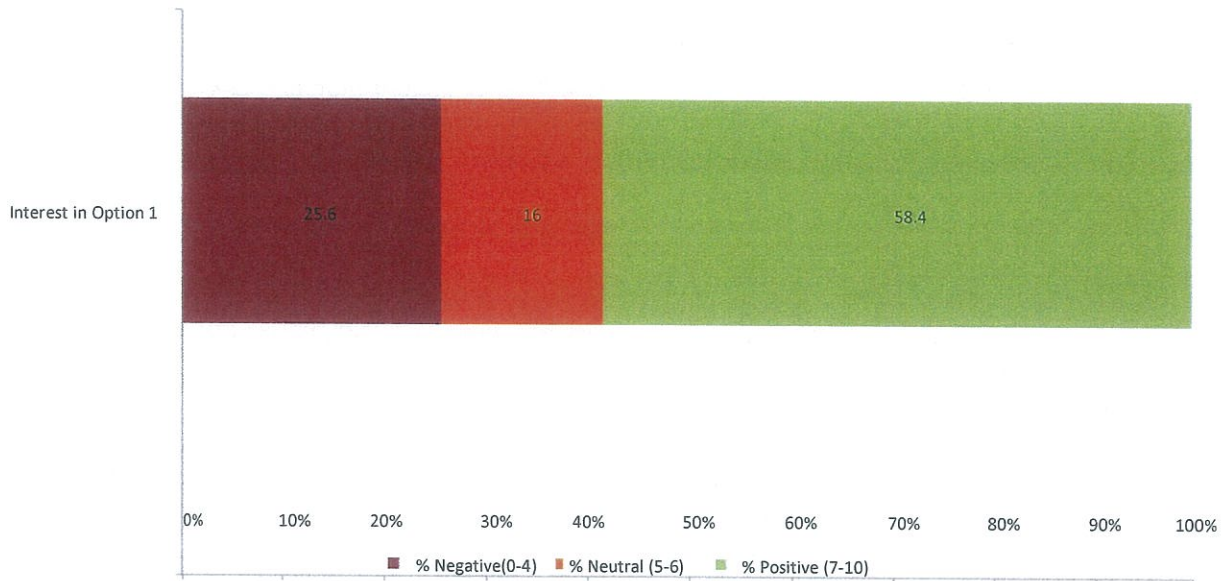
- A limited stops rail express service between Hamilton and Auckland
- This service would depart from the Frankton train station and would arrive at Britomart in Central Auckland
- This service would take approximately **1 hour and 40 minutes including** a number of stops along the way (The Base, Ngaruwahia, Huntly, Te Kauwhata, Pokeno, Tuakau, Pukekohe, Papakura, Otahuhu, Ellerslie and Newmarket)
- There would be two morning departure times from Frankton (between 6am and 7am) and another departure time between 10am and 11am
- At the end of the day there would be two return times from Britomart between (5.30pm and 6.30pm)
- This service would be available every day including weekends (although weekend times may differ)
- On-board services would include toilets, WIFI, heating/air-conditioning etc.

6.1.1 Level of interest in Service Option 1 - overall

In regards to the n=477 participants who make the journey at least once a month – when presented with the above information:

- 37.4% rated their interest as 90% or higher
- Just under half (48.3%) rated their level of interest as 80% or higher
- 58.4% rated their level of interest as 70% or higher.

There was a small decrease in the indicated likelihood to use the service between when participants were asked about 'willingness to consider' without any service option description, compared to when they were provided with a description – as outlined above for Service Option 1. As an example, participants who rated their willingness to consider the service as 70% or higher, reduced from 61% (with the specific service description) to 58.4 % with the Service Option 1 description provided.



Participants provided the below reasons for their level of interest in Option 1.

Examples of reasons for scores of 40% or lower (lower level of interest):

- Because I still need to travel once I arrive/trains are not suitable for shopping
- I start work at 7 finish at 3.15 in Mt Wellington like everyone else
- Not traveling at time that would work for me
- How am I expected to get from Britomart to the airport or any other destination? Most of the day would be gone travelling
- Would still then have to get from Britomart to destination.
- Return time is too late.
- Can't carry heavy tools
- I don't believe your time if 1hr 40min would be accurate given all the stops
- I would not have the use of my vehicle to do what I want and I do not like to be restricted to timetables
- I work at Auckland Airport and would only consider a service that connects with the airport precinct without a number of service changes (i.e. train to bus to bus etc.)
- I would then have to rely on public transport to get anywhere else. I don't go to Auckland to shop, I go to visit people or go to the airport
- Not going to a single destination in Auckland
- Where do I leave my car at Frankton?
- After accounting for how long it would take me to get to/from train stations to/from work and the associated cost I'm better off driving
- I understand parking is a pain in the backside at the train stations and there have been a lot of break-ins/ damages. Also you then have to get from the train station to your destination and buses don't run that regularly and it is a pain to have to take more than one mode of transport
- Travel times too restrictive e.g. for a breakfast meeting in Auckland, arrive back in Hamilton too late in the day.

- I usually need to be back in Hamilton for school pick ups etc. so this option would not suit for timings
- As I travel mostly to the airport this would be of no use to me. I also don't believe the trip can be done in 1hr 40 with all the stops
- I very rarely travel to Auckland for a whole day for business and rarely travel to Auckland CBD.
- I would still need a private vehicle to get to Hamilton as there is no bus service from Pirongia, then I would need to have day parking facilities. Once in Auckland I would need a vehicle to get about then an overnight park to leave the car in order to go home

Examples of reasons for scores of 70% or higher (high level of interest):

- The links to Britomart sound excellent, but I would like an airport option
- Sounds good but I feel there is too many stops a long the way, especially if you are trying to get to work in the city
- Interested, however again it will be a matter of how far away the train station would be from my destination - i.e. how would I then commute to my destination?
- It would work with my work hours when travelling to the Auckland and, but an earlier departure time from Auckland would be great
- Fantastic idea! My family would go up often to visit other family members
- If I could leave my car at The Base without a fee and get off at Newmarket it would be hugely convenient.
- The ability to work a day in Auckland and be able to work both ends of the trip is great. The departure times from Hamilton may need further consideration - perhaps 6am-7am and 9am - 10am would be more suitable (e.g. arriving for 8am and arriving for late morning)
- Trains are generally more accessible for wheelchairs, less cramped and more comfortable. They're also generally faster and no traffic jams to contend with
- Partner travels to work everyday in Auckland ... he could sleep
- No traffic jam. Locations are convenient. Sounds like the ride will be fairly comfortable
- Ticks all the boxes of what I'd need. A coffee / refreshment cart would be the icing on the cake. And an ability to reserve seats, buy season tickets, book seats in advance and book into 'quiet carriages' with tables for working on laptops would be perfect. Just do like they do in London and you can't go far wrong
- The later Hamilton departure time is good (11am). However during the week a later departure time from Auckland would also be good
- Those times would suit me to go to the company I work for. I would also think about visiting Auckland for the day in the weekends.
- As have a clear personal preference to use a commuter train if available
- Less stress, more environmentally friendly, I could do other things on the train, comfortable, feel like I'm being more productive with my time than sitting in traffic jams
- Won't have to worry about parking, driving, traffic jams. I know the companies I want to work for are in the CBD and I could walk there from Britomart. The running times are very good too
- The in train experience seems very accommodating and comfortable whilst the train timetables seem very convenient. It will also mean I am able to avoid daily early morning traffic is absolutely terrible hurdle for me
- So much less stressful than driving. Can do other activities on the train. It's faster than being stuck in traffic. No parking worries. Toilets on the train

6.1.2 Likely usage frequency

Participants (N=473) were asked **how often** they would be likely to use **Service Option 1** if the timetable and the service suited them and they were comfortable with the ticket price:

- 6.1% stated that they would use the service 5 times a week
- 12% would use the service at least 3 times a week
- 22.8% would use the service at least once a week
- 41.2% would use the service at least once a fortnight
- 65.9% would use the service at least once a month.

This translates into approximately n=395 journeys per week – for those participants who indicated that they would utilise the service at least once a month.

Option 1: Likely usage frequency	20 %	40 %	60 %	80 %	100 %	Frequency	N=473
At least 5 times a week						6.1%	29
At least 3-4 times a week						5.9%	28
At least 1-2 times a week						10.8%	51
At least once every 2 weeks						18.4%	87
At least once a month						24.7%	117
Once every 2-3 months						12.5%	59
Once every 4-12 months						6.3%	30
Rarely/never						15.2%	72

6.1.3 Barriers to using the service

Participants who said they were only likely to use this service once every 4-12 months or less often were asked to identify what the barriers to using this service would be for them. The following barriers were identified:









Barrier	N=102
I need my vehicle while I am in Auckland	66.7%
I travel at different times of the day (no one fixed time between Waikato and Auckland)	49.0%
Arriving at Britomart (or any of the other Auckland stops) would be inconvenient for me	47.1%
There is no train station close to where I live	38.2%
I prefer to drive my own vehicle	32.4%
I don't travel to Auckland frequently so am happy with my current mode of transport	25.5%
I would be concerned about the reliability of the service	16.7%
The travel time (of 1 hour 40 minutes) is too long	14.7%
I have a disability or physical impairment that prevents me from using public transport	3.9%
I already carpool and am happy with that	1.0%
Other	11.8%

Note that this was a multiple response question.

The main barriers to utilising this service are related to the need to have a vehicle when in Auckland, travel timing along with the departure and/or arrival points, although there are also a number of other relatively significant barriers.

6.1.4 Preferred weekday (Monday-Friday) morning departure times from Frankton

When answering this question participants were asked to consider their preferred arrival time if joining or exiting the service from one of the other stops along the way (e.g. The Base, Ngaruwahia, Huntly, Te Kauwhata, Pokeno, Tuakau or Pukekohe). Note that these questions were only asked of people who said they would use this service at least once every 2-3 months.

Preferred weekday morning departure times	20%	40%	60%	80%	100%	Percentage	N=370
Weekday travel is not relevant to me						14.9%	55
6.30am departure from Frankton – arriving 8.10am Britomart						22.2%	82
7.00am departure – arriving 8.40am						20.0%	74
7.30am departure – arriving 9.10am						20.5%	76
10.00am departure						11.6%	43
10.30am departure						2.2%	8
11.00am departure						2.4%	9
Another time						6.2%	23

6.1.5 Preferred weekday (Monday-Friday) evening departure times from Britomart

Preferred weekday evening departure times	20%	40%	60%	80%	100%	Frequency	N=313
5.00pm departure from Britomart – arriving 6.40pm Frankton						35.8%	112
5.30pm departure – arriving 7.10pm						30.7%	96
6.00pm departure – arriving 7.40pm						20.4%	64
Another time						13.1%	41

6.1.6 Preferred weekend (Saturday-Sunday) morning departure times from Frankton

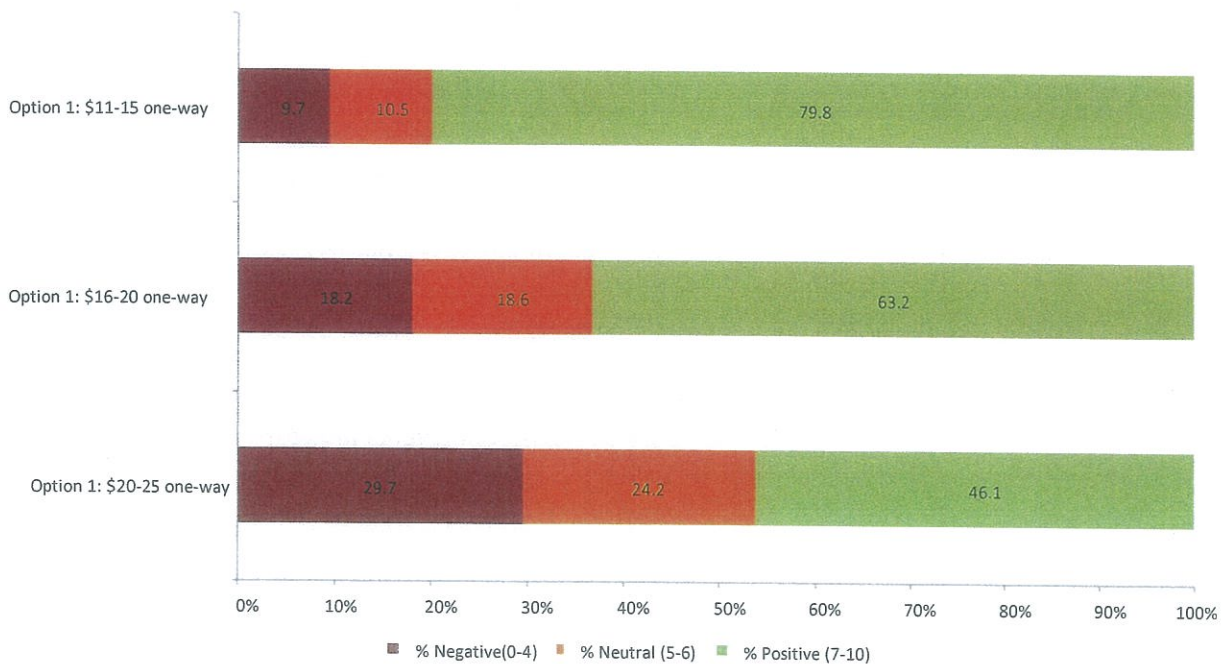
Preferred weekend morning departure times	20%	40%	60%	80%	100%	Percentage	N=368
Weekend travel is not relevant to me						22.8%	84
8.00am departure from Frankton – arriving 9.40am Britomart						29.6%	109
9.00am departure – arriving 10.40am						29.3%	108
10.00am departure – arriving 11.40am						12.5%	46
Another time						5.7%	21

6.1.7 Preferred weekend (Saturday-Sunday) evening departure times from Britomart

Preferred weekend departure times from Britomart	20 %	40 %	60%	80%	100 %	Percentage	N=284
4.00pm departure from Britomart – arriving 5.40pm Frankton						24.6%	70
5.00pm departure – arriving 6.40am						28.9%	82
6.00pm departure – arriving 7.40pm						37.0%	105
Another time						9.5%	27

6.1.8 Pricing

The pricing results (n=480 participants) for Service Option 1 indicates that while almost half (46.1%) stated their likelihood to utilise the service as 70% or higher at a \$20-\$25 price point, that there is quite a high degree of price elasticity i.e. as the ticket price reduces there is quite a significant increase in indicative demand.



6.2 Option 2: A standard passenger rail service from Hamilton to Papakura – and changing to the Auckland metro rail line from Papakura to Britomart

Option 2:

- A standard passenger rail service from Frankton train station to Papakura and then changing onto the Auckland rail metro line from Papakura to Britomart
- This service would take approximately **2 hours and 20 minutes including** a number of stops along the way (The Base, Huntly, Te Kauwhata, Tuakau) as well as the Auckland metro stops from Papakura
- On Mondays to Fridays there would be two morning departure times from Frankton (between 6am and 7am) - and at the end of the day, two return times from Britomart between (5.00pm and 6.00pm)
- The return service would involve the Auckland rail metro line to Papakura and then a train service through to Frankton train station (with a number of stops along the way)
- This service would be available every day including weekends (although weekend times may differ)
- On-board services would include toilets, WIFI, heating/air-conditioning etc.
- On Mondays to Fridays this service would **NOT** have an additional morning departure time of between 10am and 11am

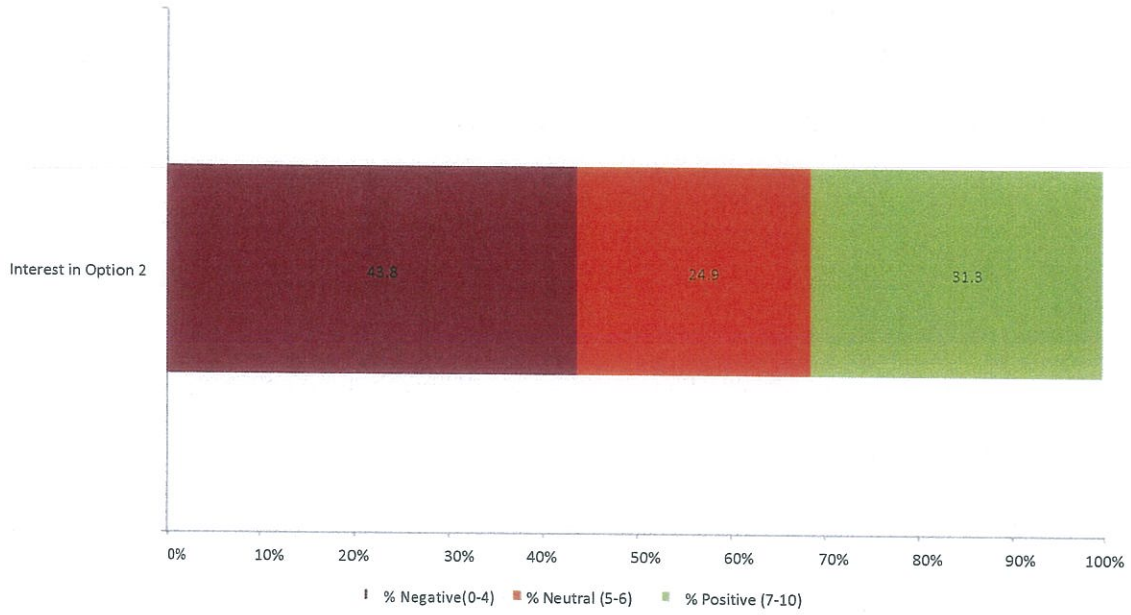
Note that only those participants who indicated that they were interested in Service Option 1 were asked about Service Option 2. This was because if they were not interested in the first Option then they would not be interested in the second (or subsequent third) Option.

6.2.1 Level of interest in Service Option 2 - overall

Of the n=359 participants who were asked about their level of interest in Service Option 2:

- 14.5% who make the journey at least once a month rated their interest at as 90% or higher
- 22.9 rated their level of interest as 80% or higher
- 31.3% rated their level of interest as 70% or higher.

It should be noted that these are significantly lower levels of interest than for Service Option 1 and that, as indicated in the graph below, far more participants rated their level of interest in Service Option 2 at or below 40% than was the case for Service Option 1.



Participants provided the following reasons for their level of interest in Service Option 2.

Examples of reasons for scores of 40% or lower (low level of interest):

- Never get to work on time
- Longer travel than by car and inconvenient times
- Car can be about the same and wouldn't have to transfer
- Travel time is too long, and then I would still have to get to the ultimate destination by public transport so probably looking at 3 hours each way.
- Time is money and sitting two hours is slower than a car and charging stations and trains is frustrating and looks bad for tourists also this is not a good incentive
- Heck of a long day! I still have the second journey to factor in too. This could mean 6 hrs travel a day!
- It doesn't save a lot of time
- Need to do it properly from the get go. If you don't people won't use it and the told you so brigade will have a field day
- Too much of a mess to transfer trains rather than a straight trip
- Option 1 is better. Offering this as an interim is high risk as there's a good chance people will change their minds or the government will change, and we'll be stuck with this service. Offer the preferred service from the get go, and make it high quality, regardless of the wait
- Changing to the Auckland metro services is a real time-waster and probably means I wouldn't bother. The return journey could easily be missed due to unforeseen problems on the Auckland metro services, which is an unacceptable risk
- Depends how long the wait time is at Papakura. No one likes sitting on a cold wet train platform with 3 young sprogs for more than 5 mins. And it's a longer end to end journey, which means getting to an appointment or work by 9am would be impossible
- Changing trains means becoming part of the Auckland suburb crowd and at busy times especially coming back to Hamilton could be come an issue if train are full

Examples of reasons for scores of 70% or higher (higher level of interest):

- It's still better than driving if you can't arrange to drive during off-peak times.
- Easy option to get to Auckland
- As an interim option I would use it but would prefer and express option. If the cost of transport was the same as driving but it took longer to take the train I would probably be more inclined to take the car
- Would still be a lot better than driving
- Interim only! Too long a trip to be realistic for an ongoing commute basis
- Option 1 is preferred but as long as it was short term option 2 would be ok - less desirable as have to change trains
- The length of the overall travel is quite lengthy and time consuming, however, the facilities sound very accommodating and comfortable
- It is not as good as the first option because I would rather be able to go all the way to Auckland where I will stay, but it is still much better than taking the car or bus in which you most of the time have to wait for traffic.
- While longer than option one it is still comparable to current road travel times without the cost of parking and having to sit in traffic
- I'd much prefer sitting down using wifi that driving

6.2.2 Likely usage frequency

Participants were asked how often they would be likely to use this service if the timetable and the service suited them and they were comfortable with the ticket price:

- 8.2% would use the service at least 3 times a week
- 19.1% would use the service at least once a week
- 32.5% would use the service at least once a fortnight
- 56% would use the service at least once a month.

This translates into approximately n=231 journeys per week – for those participants who indicated that they would utilise the service at least once a month.

Option 2: Likely usage frequency	20 %	40 %	60 %	80 %	100 %	Percentage	N=357
At least 5 times a week						4.8%	17
At least 3-4 times a week						3.4%	12
At least 1-2 times a week						10.9%	39
At least once every 2 weeks						13.4%	48
At least once a month						23.5%	84
Once every 2-3 months						12.3%	44
Once every 4-12 months						5.9%	21
Rarely/never						25.8%	92






6.2.3 Preferred weekday (Monday-Friday) morning departure times from Frankton

Preferred weekday morning departure times	20%	40%	60%	80%	100%	Percentage	N=242
Weekday travel is not relevant to me						16.9%	41
6.00am departure from Frankton – arriving 8.20am Britomart						29.8%	72
6.30am departure – arriving 8.50am						16.1%	39
7.00am departure – arriving 9.20am						27.7%	67
Another time – please tell us what that would be						9.5%	23

6.2.4 Preferred weekday (Monday-Friday) evening departure times from Britomart

Preferred weekday evening departure times	20%	40%	60%	80%	100%	Percentage	N=198
4.30pm departure from Britomart – arriving 6.50pm Frankton						31.3%	62
5.00pm departure – arriving 7.20pm						26.8%	53
5.30pm departure – arriving 7.50pm						32.8%	65
Another time						9.1%	18

6.2.5 Preferred weekend (Saturday-Sunday) morning departure times from Frankton

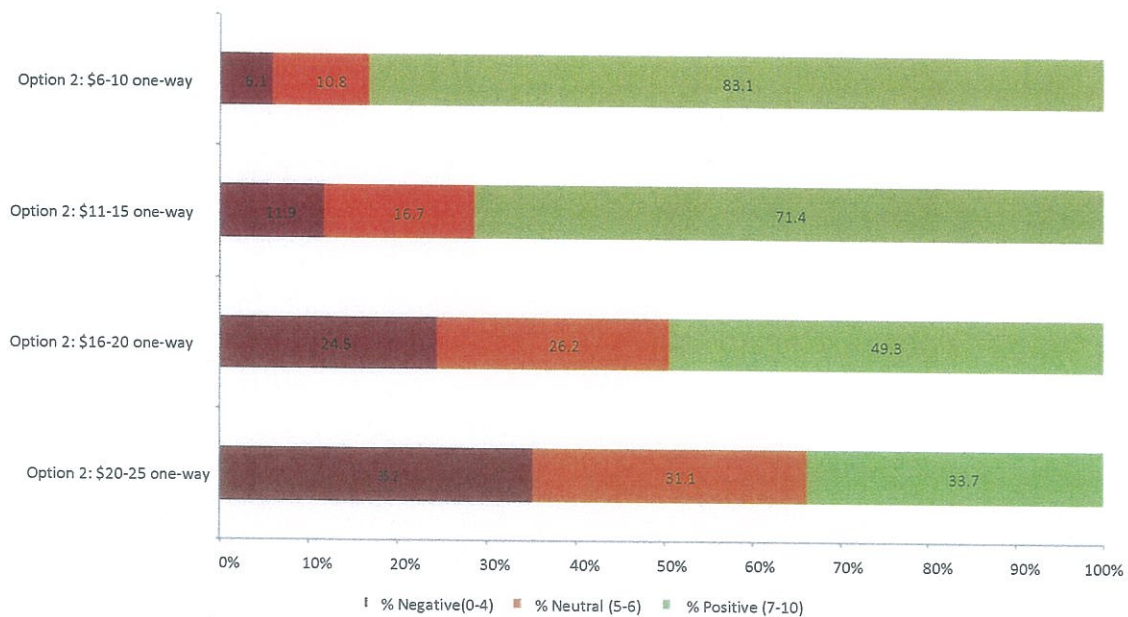
Preferred weekend morning departure times	20 %	40 %	60 %	80 %	100 %	Percentage	N=241
Weekend travel is not relevant to me						23.2%	56
8.00am departure from Frankton – arriving 10.20am Britomart						40.7%	98
9.00am departure – arriving 11.20am						19.5%	47
10.00am departure – arriving 12.20pm						12.9%	31
Another time – please tell us what that would be						3.7%	9

6.2.6 Preferred weekend (Saturday-Sunday) evening departure times from Britomart

Preferred weekend departure times	20 %	40 %	60 %	80 %	100 %	Frequency	N=180
4.00pm departure from Britomart – arriving 6.20pm Frankton	[Progress bar]					29.4%	53
5.00pm departure – arriving 7.20am	[Progress bar]					33.9%	61
6.00pm departure – arriving 8.20pm	[Progress bar]					30.0%	54
Another time – please tell us what that would be	[Progress bar]					6.7%	12

6.2.7 Pricing

The pricing results (n=359 participants) for Service Option 2 indicates that while almost half (33.7%) stated their likelihood to utilise the service as 70% or higher at a \$20-\$25 price point, that there is quite a high degree of price elasticity i.e. as the ticket price reduces there is quite a significant increase in indicative demand. In addition, the, the ‘lesser’ service specification between Service Options 1 and 2 impacts negatively on the indicative demand at each price level, for example, there is a 12.4% reduction in the percentage of people that indicate their interest level as being 70% or higher at a \$20 to \$25 ticket price.



6.3 Option 2A: A double decker bus service from Waikato to Papakura – and changing to the Auckland metro rail line from Papakura to Britomart

Option 2A:

- A **double decker bus service** from the Hamilton Transport Centre to Papakura and then changing onto the Auckland rail metro line from Papakura to Britomart
- This service would take approximately between **2 hours and 15 minutes and 2 hours and 45 minutes including** a number of stops along the way (The Base, Huntly and Pokeno)
- There would be two morning departure times from the Hamilton Transport Centre (between 6am and 7am) - and at the end of the day, two return times from Britomart between (4.30pm and 5.30pm)
- The return service would involve the Auckland rail metro line to Papakura and then a double decker bus service through to the Hamilton Transport Centre (with a number of stops along the way)
- This service would be available every day including weekends (although weekend times may differ) There would be park and ride facilities available at the different bus stops

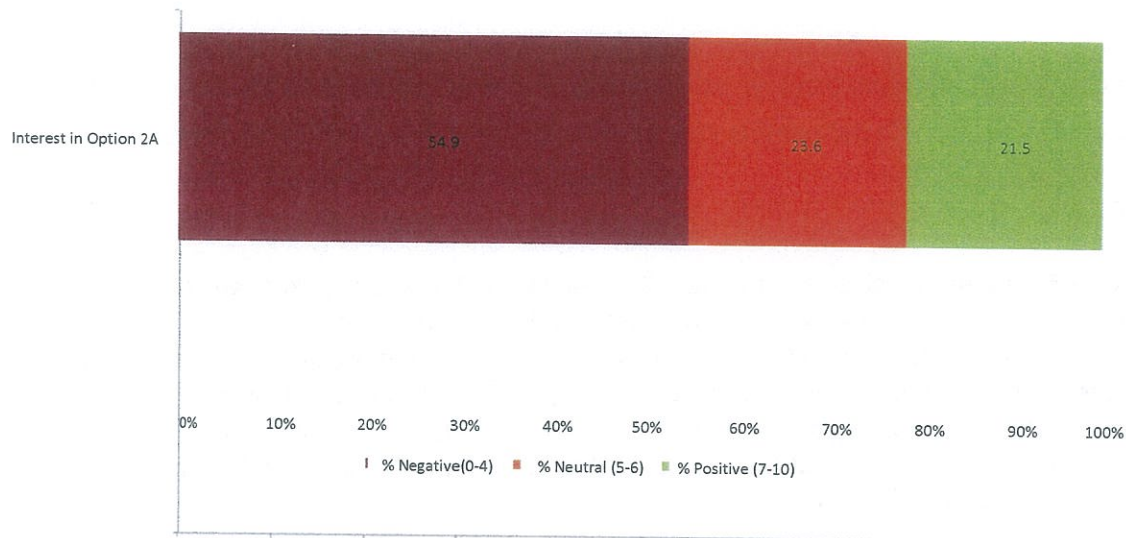
The only participants that were asked about their level of interest in Service Option 2a were those that indicated interest in Service Option 2 – for the same reason as outlined above in regards to Service Option 2's sampling approach.

6.3.1 Level of interest in Service Option 2A - overall

Of the n=237 participants who were asked about their level of interest in Service Option 2a:

- 9.3% of participants rated their interest as 90% or higher
- 15.2% rated their level of interest as 80% or higher
- 21.5% rated their level of interest as 70% or higher.

It should be noted that these are significantly lower levels of interest than for Service Options 1 or 2 and that, as indicated in the graph below, far more participants rated their level of interest in Service Option 2a at or below 40% than was the case for Service Options 1 or 2.



Participants provided the following reasons for their level of interest in Service Option 2a.

Examples of reasons for scores of 40% or lower (low level of interest):

- A bus option is not appealing and the length of travel is too long (for a less comfortable ride than a car)
- Not interested in catching buses
- I would rather drive than use the bus
- Don't really like buses and don't like double deckers at all
- The travel time is unacceptably long and just as fraught with delays and accident blockages as private car travel is
- Motorway issues from Drury to Papakura even if you go down the Great South Road its jammed at that time early mornings
- I do not like public bus travel and only use it as a last resort
- Still travelling on road for most of the way
- Buses are unreliable
- The bus would have a lot of the drawbacks of a car- the potential for hold ups, to be caught in the inevitable and frequent traffic issues, and even on a "good" day there is a lot of stopping and starting, which is not conducive to usually the travel time effectively
- Would get stuck in traffic. Hard to work on a bus
- Still has the problem of being stuck in traffic - at Drury - the unpredictability because of being held up. It is not as easy to work on a bus as a train
- Transit from bus to train is confusing and stressful e.g. if your bus is late and misses the next train. Also lugging baggage from transit to transit is awkward
- Too long to commute and still would be dealing with regular traffic so may as well have the convenience of a private car
- I feel that a bus is going to get caught up in traffic (much like driving). This option would be better if bus lanes were also installed along the whole route (similar to Auckland's north shore service)
- What's the real benefit? Unless it is really cheaper, the only benefit is not parking. You still sit in traffic, can't

really work on a bus

- Will be subjected to road traffic conditions

Examples of reasons for scores of 70% or higher (higher level of interest):

- I'd still use it but I hate changing buses etc. while traveling
- Only on the proviso that it was wheelchair accessible and bookings could be made online for wheelchair users rather than them having to ring up and book (i.e. there is designated spaces on the bus for wheelchairs AT ALL TIMES).
- It would be cheaper than a car
- It would be a different way to travel
- Public transport is a must to me

6.3.2 Likely usage frequency

Participants were asked how often they would be likely to use this service if the timetable and the service suited them and they were comfortable with the ticket price:

- 8.5% would use the service at least 3 times a week
- 17.8% would use the service at least once a week
- 31.3% would use the service at least once a fortnight
- 48.2% would use the service at least once a month.

This translates into approximately n=147 journeys per week – for those participants who indicated that they would utilise the service at least once a month.

Option 2A: Likely usage frequency	20 %	40%	60%	80%	100%	Percentage	N=237
At least 5 times a week						5.1%	12
At least 3-4 times a week						3.4%	8
At least 1-2 times a week						9.3%	22
At least once every 2 weeks						13.5%	32
At least once a month						16.9%	40
Once every 2-3 months						11.0%	26
Once every 4-12 months						2.5%	6
Rarely/never						38.4%	91

6.3.3 Preferred weekday (Monday-Friday) morning departure times from Hamilton

Preferred weekday morning departure times	20%	40%	60%	80%	100%	Percentage	N=140
Weekday travel is not relevant to me						12.1%	17
6.00am departure from the Hamilton Service Centre – arriving Britomart approx. 8.30am						29.3%	41
6.30am departure – arriving approx. 9am						18.6%	26
7.00am departure – arriving approx. 9.30am						20.0%	28
10am departure						10.0%	14
10.30am departure						4.3%	6
11am departure						2.9%	4
Another time – please tell us what that would be						2.9%	4

6.3.4 Preferred weekday (Monday-Friday) evening departure times from Britomart

Preferred weekday evening departure times	20%	40%	60%	80%	100%	Percentage	N=123
4.30pm departure from Britomart – arriving Hamilton Service Centre approx. 7.00pm						23.6%	29
5.00pm departure – arriving approx. 7.30pm						34.1%	42
5.30pm departure – arriving approx. 8.00pm						35.8%	44
Another time – please tell us what that would be						6.5%	8

6.3.5 Preferred weekend (Saturday-Sunday) morning departure times from Hamilton

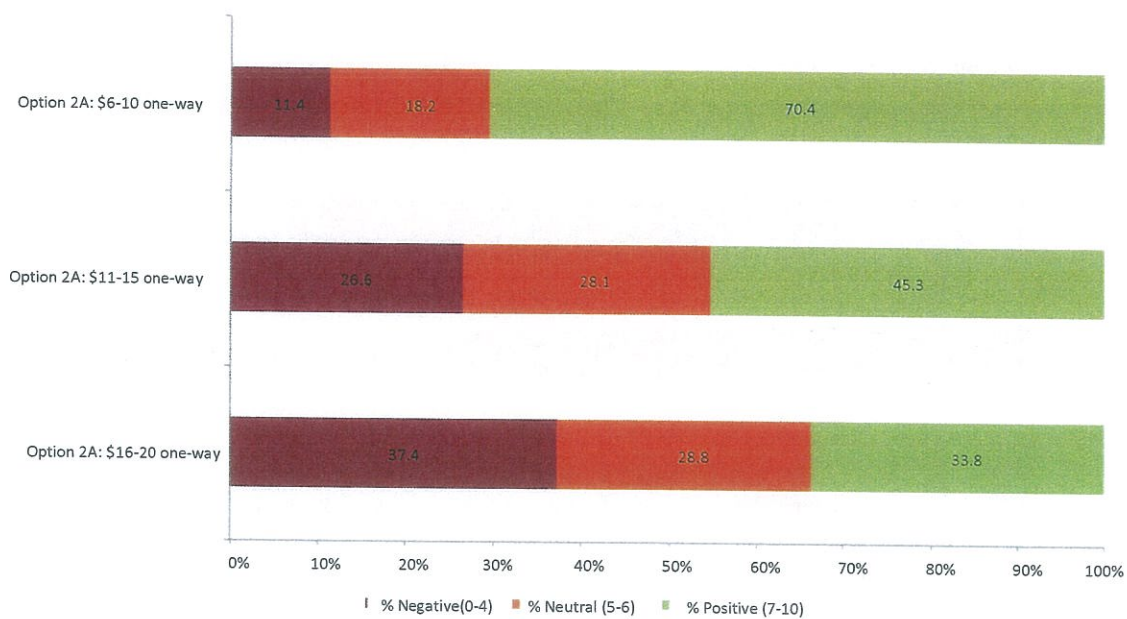
Preferred weekend morning departure times	20 %	40 %	60 %	80 %	100 %	Percentage	N=139
Weekend travel is not relevant to me						22.3%	31
8.00am departure from Hamilton Service Centre – arriving approx. 10.30am Britomart						43.2%	60
9.00am departure – arriving approx. 11.30am						25.2%	35
10.00am departure – arriving approx. 12.30pm						8.6%	12
Another time – please tell us what that would be						0.7%	1

6.3.6 Preferred weekend (Saturday-Sunday) evening departure times from Britomart

Response	20 %	40 %	60 %	80 %	100 %	Frequency	Count
4.00pm departure from Britomart – arriving approx. 6.30pm Hamilton Service Centre						25.9%	28
5.00pm departure – arriving 7.30am						35.2%	38
6.00pm departure – arriving 8.30pm						32.4%	35
Another time – please tell us what that would be						6.5%	7

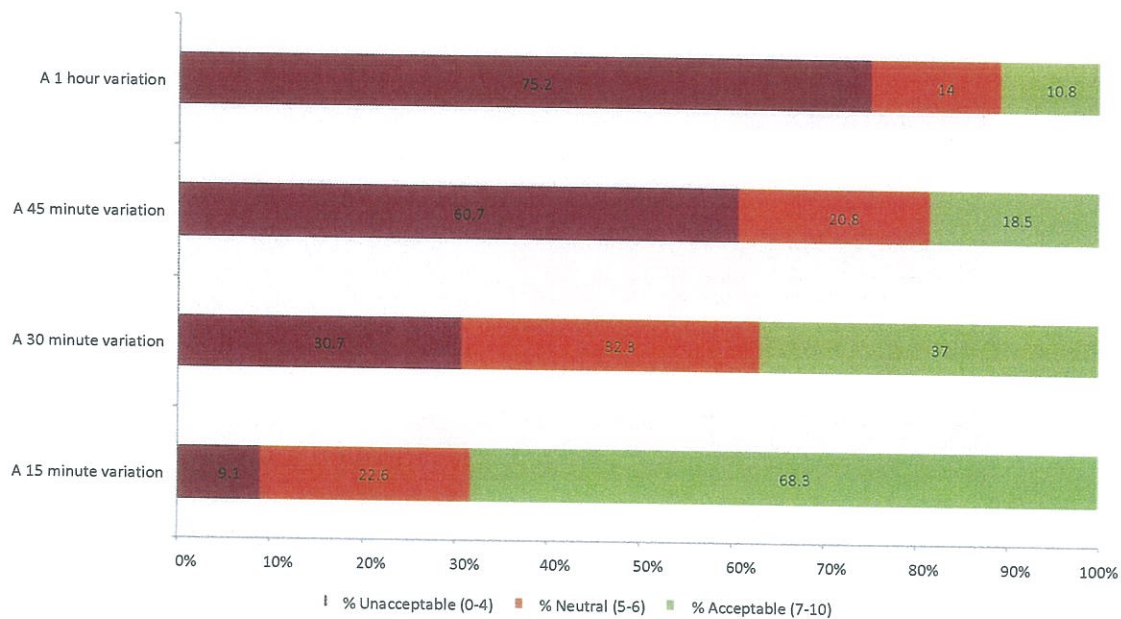
6.3.7 Pricing

The pricing results (n=237 participants) for Service Option 2A indicates that one-third (22.3%) stated their likelihood to utilise the service as 70% or higher at a \$16-\$20 price point, that there is quite a high degree of price elasticity i.e. as the ticket price reduces there is quite a significant increase in indicative demand. In addition, the, the 'lesser' service specification between Service Options 2 and 2A impacts negatively on the indicative demand at each price level, for example, there is a 15.5% reduction in the percentage of people that indicate their interest level as being 70% or higher at a \$16 to \$20 ticket price.



6.4 Acceptability of timeframe variations

Between n=152 and n=156 participants answered a question about the acceptability of journey time variations (the sample size varied between the time options slightly). A 15 minute journey time is acceptable to most of these participants (it is unacceptable to 9.1% of them) while a 30 minute variation becomes unacceptable for almost one third (30.7%) of these participants. A variation of more than 30 minutes is unacceptable for the majority of these participants.



6.5 Importance of on-board facilities

N=150 participants also answered a question as to what on-board facilities and services they would like. The facilities and that one-third or more of these participants rated as being important to very important were:

On-board facilities	Percentage 7-10 importance
Air-conditioning/heating	91.2%
Toilet facilities	78.4%
Free wifi	77.0%
Power connections (for charging phones/laptops)	69.7%
Workspace (space for laptop/writing)	58.6%
Seats that recline	53.0%
A food and beverage service (drinks/snacks)	38.7%

7: Demographics

7.1 Gender of participants

Gender	20%	40%	60%	80%	100%	Percentage	N=660
Male						44.5%	294
Female						53.9%	356
I would rather not say						1.5%	10

7.2 Age of participants

Age	20%	40%	60%	80%	100%	Percentage	N=661
18-19 years of age						1.7%	11
20-29						10.3%	68
30-39						16.8%	111
40-49						21.3%	141
50-59						18.0%	119
60-69						19.7%	130
70+						9.5%	63
I would rather not say						2.7%	18

8: Interviews with Waikato-based organisations

8.1 Background

This section presents the findings from interviews conducted with representatives of 18 Waikato-based organisations. The purpose of these interviews was to understand the extent to which staff at these organisations commute between Waikato and Auckland on a regular basis, and subsequently to identify the level on interest in a public transport commuter service.

The following organisations were identified by Waikato Regional Council to be interviewed for this component of the project:

Fonterra	Porter Group	Greenlea
The University of Waikato	Gallagher	Dairy Goat Cooperative
Wintec	The Warehouse Group	Datacom
Waikato DHB	APL	Chowhill
Deloitte	NDA Engineering	Waikato Innovation Park
Perry	Profile Foods	Wises

8.2 Findings

The key findings here are that:

1. Of the organisations interviewed, Fonterra had the largest number of staff commuting between Waikato and Auckland on a regular basis (by a considerable margin), and expressed significant interest in, and a willingness to support a public transport commuter service
2. Staff in many of the other organisations are not commuting between Waikato and Auckland on a regular basis. Their travel tends to be more ad hoc. Waikato University for example reported that there are between 1-3 fleet cars travelling between Waikato and Auckland most (but not all) days of the week but that there are no regular 'commuters' (i.e. no individual staff members regularly making the journey)
3. Staff in some of these organisations are more likely to commute South (to other provincial areas) rather than North to Auckland (i.e. in some organisations Waikato-based staff 'service' areas to the South of Waikato, while Auckland-based staff service areas South of Auckland and through to Waikato). This includes Waikato-based staff at both Deloitte and Datacom who are more likely to travel to Tauranga than they are to Auckland
4. Where staff are commuting on a more regular basis between Waikato and Auckland, numbers are **low overall**
 - usually 1-2 people or in some cases up to 6 people commuting each week
5. In many instances staff require a vehicle while in Auckland. This is because staff try to arrange multiple meetings while in Auckland in order to maximise the value of each trip

6. Meetings in Auckland are not necessarily in the CBD so arriving at Britomart would not always be convenient. Perry Group reported that even though there are 6-7 people commuting each week, it is often to Auckland airport and that staff will often arrange multiple meetings while in Auckland at a range of different locations. Waikato DHB reported that approximately 6-7 staff members commute to Auckland each week but that half of those are travelling for education purposes and require a vehicle in Auckland to travel between multiple sites. The other half are travelling for clinics – not all of which are located at Auckland DHB (the closest DHB to Britomart)
7. Where possible, Auckland meetings are coordinated so multiple staff members can travel in one vehicle
8. There is very little data collected by these organisations in terms of frequency of commuting or the cost of commuting.

All of the organisations interviewed with staff commuting between Waikato and Auckland (either regularly or on an ad hoc basis) expressed an interest in Service Option 1 (provided it met staff needs 'on the day' in terms of departure and arrival times, location of meetings etc.) . Option 1 was considered the most attractive option primarily because of the shorter commuting time of one hour and 40 minutes and the fact that it was an express service through to Auckland. There was less interest in Service Option 2 and very limited interest in Service Option 2A (which has a longer commuting time, requires an earlier departure and is 'on road' i.e. bus rather than train travel). Most of the organisations interviewed indicated that for a commuter service to be of interest and for there to be uptake, the commuting time would need to be two hours or shorter.

The organisation with the largest number of staff commuting between Waikato and Auckland on a regular basis was Fonterra. Fonterra have estimated that approximately 657 staff members are travelling between Waikato and Auckland on a regular basis (although note here that they were unable to provide any data on 'regularity'). Fonterra were able to identify however that approximately 40 staff members are travelling five times each week. These are staff members who choose to live in Waikato but work in Auckland. Other staff members are travelling to Auckland for meetings and workshops. Fonterra reported that although they make use of videoconferences or Skype for staff meetings, workshops are more effective when they are conducted in person.

Fonterra report that they have been looking at this issue for quite some time, with their main concerns being around:

- Health and safety issues – the length of time people are 'at work' including commuting time (which is often 3 hours each way or a 6 hour return journey on top of their working day)
- Commuting time being unproductive time
- Staff well-being – having long workdays, being away from families, feeling tired etc.
- Staff arriving late and often 'angry' because of congestion hold ups
- The cost (to Fonterra) where company cars or pool cars are being used
- The cost of parking in Auckland – under the proposed District Plan they would only be able to allocate a car park for 25% of staff in their Fanshawe Street building (i.e. there would be very limited on-site parking). They estimate the cost of parking in the Auckland CBD to be between \$29 and \$45 (with most more towards the upper end)
- The cost of Fonterra of having their trucks, milk tankers and other vehicles held up because of congestion on the road which can impact on delivery times
- A belief that congestion will only get worse – especially now that the Mill Road Corridor is not going ahead.

Fonterra estimate that the cost of travel per person (to Fonterra) is \$200 each trip. While staff who choose to live in Hamilton but work in Auckland are not reimbursed for their travel time, there are still health and safety, and well-being issues which impact them.

Fonterra have already considered alternatives to SOV commuting – a Fonterra bus and carpooling. However, neither were seen as viable. The staff bus idea was rejected by staff because staff would still be on the road (and so travel times wouldn't be impacted) and work is not possible on a bus (so this would not address issues around unproductive time) . Carpooling was also not considered a possibility given that it is difficult to organise and there are barriers to staff interest.

Fonterra are committed to continuing to consider alternative options or incentives for their commuting staff such as electric vehicles being offered to train commuters (as a first priority) as a means of traveling around Auckland and half days for long commuting times. Fonterra would also be prepared to change their travel policy e.g. require that all people travelling from Hamilton to Auckland must use the train.

In terms of the three options, there was a high level of interest in Service Option 1, some interest in Service Option 2 and no interest in Service Option 2A. Fonterra suggested however that a mid-afternoon return from Britomart would be desirable.

9: Conclusion

The results of the survey indicate that there would be demand for a connection service between Waikato and Auckland – especially for Service Option 1 and, to a lesser extent, Service Option 2. Important to the actual level of demand will be the ticket pricing – as is highlighted by the above results. In addition, the fact that most of the journeys made are not for ‘business’/work purposes but also that most vehicles have more than one occupant (and in many cases more than two passengers) need to be taken into account in regards to both timing of any service(s) and also potential demand levels.

While the results indicate that the potential demand levels are highly elastic with regards to ticket pricing (as well as the ‘service level’), they also suggest that a key attractor to a potential service is being able to ‘get back time’ (in regards to time ‘at the wheel’) and also reduce stress (amongst other things). Yes pricing is important but there are also other strong benefits of such a service that are not only creating potential demand but that should also be used as part of any promotional activity if a service is introduced.

Finally, one way that demand levels could be, at least to some extent, guaranteed is if the providers of the potential service are able to partner with organisations such as Fonterra. While this project has found that many large Waikato organisations do not have many if any staff who commute up to Auckland on a regular basis others do – and especially Fonterra who is extremely keen to explore the possibility of the potential service offer further.