

Horizon Research
Auckland Harbour
Bridge Pathway

4 February 2013



Contents

EXECUTIVE SUMMARY	1
1. Support for the Auckland Harbour Bridge Pathway concept.....	5
2. Trips and frequency of use.....	5
2.1 First year	5
2.2 Subsequent years.....	6
2.3 Trip type	7
2.4 Trip mode.....	8
3. Use of other services.....	9
3.1 Rental bicycle	9
3.2 Cafe	10
3.3 Bungy jump and bridge climb	11
4. Visitors to Auckland	12
5. Cycling over the Pathway to get to work or study.....	12
6. Value for money.....	13
6.1 Basic crossing for \$1.95 each way.....	13
6.2 Longer crossing for \$3.50 each way.....	14
7. Comments	14
8. Recreational user model	16
8.1 Assumptions.....	16
8.2 Estimates.....	20
APPENDIX 1 – SAMPLE	27

EXECUTIVE SUMMARY

This report outlines the findings of a survey of 1,083 Auckland residents into recreational use of a proposed walking and cycling pathway (“the Pathway”) attached to the Auckland Harbour Bridge from Westhaven to Northcote Point. The survey has an overall margin of error of $\pm 3.0\%$.

There is strong support for the pathway and qualitative results of the survey show the concept appears to have captured the imagination of Aucklanders. Overall the concept has 81% support (48% very supportive, 33% support it). Only 5% do not support it.

While the study was focused on recreational users, a question was included on cycle commuting. This found that 9% of respondents would use the Pathway to commute by cycle to work or study.

The bulk of users identified in this study were recreational users.

88% of respondents also said that they would use the Pathway in the first year and 84% in subsequent years. More than 80% of respondents expect to be walking, not cycling on the Pathway.

While it is to be expected that not everyone who says they will use the Pathway will actually do so in any given year, if the strong support and strong intention to use the Pathway can be translated into action at least once each year, then the Pathway could see approximately 1.3 million crossings of the Pathway per annum.

The modelling of the likely visitor volumes and potential toll revenue takes into account that people do not always act on their expressed intentions. Low, medium and high probability scenarios show that visits to the Pathway could range from 520,000 to 1.2 million in the first year, with a reduction in following years:

	Probability of acting on intention to visit the Pathway		
	Low 20% probability	Medium 33% probability	High 45% probability
First year:			
Total crossings (one way)	521,710	860,821	1,173,856
Toll Revenue excluding GST	\$1,426,300	\$2,353,386	\$3,209,185
Subsequent years:			
Total crossings (one way)	458,115	755,896	1,030,763
Toll Revenue excluding GST	1,262,103	2,082,493	2,839,748

Two-thirds of crossings are likely to be “longer” crossings, allowing people to take in the view, look at exhibits or just enjoy the experience. Indications are that 84% of Pathway users would also take visitors to Auckland to the Pathway.

Respondents were also prepared to use other services associated with the Pathway or available with a crossing. From a commercial point of view, and based on the low medium and high scenarios on the modelling, the potential volumes are:

Service	% Interested	Low	Medium	High
Bicycle rental	28%	146,000	241,000	329,000
Bungy jump	31%	162,000	267,000	364,000
Bridge Climb	52%	271,000	448,000	610,000
Cafe	71%	370,000	611,000	833,000

Respondents were presented with two toll rates: \$1.95 for a “quick” crossing and \$3.50 for a “longer” crossing. Both rate more as “fair value” than “excellent value”, but only 1 in 7 thinks that \$1.95 each way for a “quick” crossing is “poor value”. 1 in 5 thinks \$3.50 each way for a “longer” crossing is “poor value”.

The Pathway appears to have strong potential to attract visitors. Translating the intention to action is the challenge.

Key findings:

Support for the Pathway concept:

- 81% support the Pathway
- Only 5% do not support it

Trips and frequency of use:

- Aucklanders have a definite intention to use the Pathway at least once after it is built.
- 88% said that they would use it in the first year, 84% per annum in subsequent years.
- A third of respondents indicated that they would use the Pathway two or three times for recreation in the first year of operation.
- 12% would not use it at all in the first year and 16% in subsequent years.
- Overall user volumes in subsequent years are lower than in the first year.
- Just over 60% of respondents expected to make return trips, with 21% one-way. The rest were unsure.
- Two-thirds of respondents expected their trips to mostly be longer visits; 22% expected to mostly make “quick” crossings.
- 84% of recreational users of the Pathway are likely to be walking.
- 14% of recreational users are likely to be cycling

Use of other services:

- Of those who said they would use the Pathway:
 - 28% of Pathway users may rent a bicycle to cross.
 - 30% would not be interested in crossing by bicycle.
 - Over 70% would use a cafe if one was established on the Pathway. A quarter of users would use the cafe most times.
 - 30% were interested in combining a bungy jump with a Pathway trip.
 - 52% were interested in combining a Bridge Climb with a Pathway visit

Visitors to Auckland:

- 84% of those who would use the Pathway said that they would take out-of-town visitors over it.

Cycling over the Pathway to get to work or study:

- 9% of those who would use the Pathway said that they would use it to cycle to get to work or study.
- A majority of those people would cycle to work or study over the Pathway no more than twice a week.

Value for money:

- Just over 50% thought that the potential toll prices (\$1.95 each way for a “quick” crossing and \$3.50 each way for a “longer” crossing) were fair value.
- 27% overall thought that \$1.95 for a “quick” crossing was excellent value for money. 14% thought it was poor value for money.
- 20% overall thought that \$3.50 for a “longer” crossing was excellent value for money. 21% thought it was poor value for money.

REPORT

1. Support for the Auckland Harbour Bridge Pathway concept

Respondents were given some basic information about the Pathway, including potential toll pricing together with illustrations of what the Pathway could look like. They were asked whether they supported having such a Pathway across the Auckland Harbour Bridge.

There was 81% support for the Pathway. Only 5% said that they did not support it.

Support for Pathway	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Very supportive	48.4%	46.4%	44.6%	53.6%	48.6%	47.3%
Support	32.6%	29.9%	30.9%	32.4%	32.9%	33.7%
Neutral	12.1%	19.5%	16.3%	10.1%	9.9%	11.8%
Don't support	3.3%	2.3%	4.5%	1.1%	5.1%	2.9%
Very unsupportive	1.8%	1.9%	3.1%	1.0%	1.0%	1.8%
Not sure	1.9%	0.0%	0.5%	1.9%	2.5%	2.4%
Base	1095	98	192	170	389	90

Note that the level of people who do not support the Pathway is slightly higher in the areas that the Pathway links – Central Auckland/Isthmus and North Shore.

2. Trips and frequency of use

Respondents were asked how frequently they would use the Pathway for recreational trips (not to get to work or study, but a trip just for fun, fitness or sightseeing) in its first year of operation and in subsequent years. As noted in Section 1, they were given information about the Pathway including potential toll costs before these questions were asked.

The responses to the questions on frequency of use have been used in the model of likely usage levels and toll revenue, as discussed in Section 7 of this report.

2.1 First year

Aucklanders have a definite intention to use the Pathway at least once after it is built and a third of them indicated that they will use it two or three times for recreation in the first year of operation.

The most frequent users are likely to come from North Shore, Central Auckland/Isthmus and West Auckland.

Pathway use in first year	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Never	11.6%	22.1%	14.0%	7.7%	6.9%	14.5%
Once in the first year	31.3%	42.7%	28.4%	32.9%	31.7%	28.5%
Two or three times in the first year	32.6%	19.3%	31.3%	31.1%	39.4%	32.4%
At least four times in the first year	13.4%	8.0%	14.7%	18.6%	12.7%	10.3%
Not sure	11.1%	8.0%	11.6%	9.5%	9.3%	14.2%

2.2 Subsequent years

User volumes in subsequent years are lower than in the first year, with the level of respondents who said that they would not use it increasing from 11% in the first year to 16% in subsequent years. Virtually all of that reduction comes from those who will only use the Pathway once in the first year.

In addition, frequency is reduced in the second and subsequent years, although there is a large increase in those who are unsure how frequently they will use it.

Pathway use in subsequent years	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Never	16.1%	23.7%	17.7%	16.8%	10.4%	17.9%
Once in the first year	27.2%	26.6%	29.4%	22.3%	29.2%	28.7%
Two or three times in the first year	25.0%	10.4%	18.0%	21.8%	34.5%	26.1%
At least four times in the first year	11.4%	6.0%	15.1%	17.8%	8.5%	7.9%
Not sure	20.4%	33.4%	19.7%	21.2%	17.4%	19.4%

These changes have an effect on projected volumes in subsequent years, which are lower than in the first year.

2.3 Trip type

Respondents who had said that they would use the Pathway were asked whether their trips would mainly be return trips using the Pathway or one-way trips, returning using another way or method of transport.

Just over 60% of respondents expected to be making return trips, with 21% one-way. Those who are contemplating one way trips are likely to be people who visit the Pathway less frequently, on average.

One or two-way trips	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
A return trip using the Pathway both ways	60.6%	42.7%	52.7%	63.2%	70.2%	56.6%
One-way trip across the Pathway, returning using another way, such as ferry or bus	21.3%	25.5%	32.2%	16.2%	16.1%	23.9%
Not sure	18.0%	31.6%	15.0%	20.6%	13.8%	19.6%

Respondents who would use the Pathway were also asked whether their trips would be mostly quick trips or longer trips (taking in the Pathway experience, enjoying the views, watching bungy jumping, having a coffee or viewing the exhibits). Two-thirds of respondents expected their trips to be longer visits, but more of the people who have longer trips will come from areas other than the North Shore. North Shore users are significantly more likely than users from other Auckland areas to have quick trips across the Pathway.

Most recreational trips	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Quick trips across the Pathway, with few stops along the way	22.1%	18.0%	46.1%	12.0%	23.6%	15.0%
Longer visits to take in the Pathway Experience, enjoy the views, watch the bungy jumping, have a coffee or view the exhibits	66.0%	60.1%	44.8%	74.6%	64.3%	72.6%
Not sure	11.9%	21.9%	9.2%	13.3%	12.1%	12.5%

Excluding those who were not sure whether they would make return trips or one-way trips, the level of quick trips is around 26% regardless of whether the Pathway user is making a return trip or a one-way trip.

Most recreational trips	Total	One or two way trips		
		Return trip using the Pathway	One-way trip	Not sure
Quick trips across the Pathway, with few stops along the way	22.1%	25.8%	26.9%	4.0%
Longer visits to take in the Pathway Experience, enjoy the views, watch the bungy jumping, have a coffee or view the exhibits	66.0%	66.1%	68.3%	63.0%
Not sure	11.9%	8.1%	4.8%	33.0%

The responses to the questions on trip type and length of trip have been used in the model of likely usage levels and toll revenue, as discussed in Section 7 of this report.

2.4 Trip mode

The vast majority (84%) of respondents who had said that they would use the Pathway are likely to be walking, with only 14% of recreational users likely to be cycling. Indications from respondents in this survey with regard to cycling for commuting rather than recreation (see Section 5) indicate that volumes of users on the Pathway are likely to be predominantly pedestrian. This should be noted in planning Health and Safety requirements and adequate management of the shared Pathway space. Note that likely incidence of cycling is slightly higher among North Shore and Central Auckland users.

Recreational trip mode	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Walk	83.9%	92.0%	82.4%	84.4%	77.9%	90.0%
Cycle	14.4%	6.3%	16.2%	14.5%	18.6%	10.0%
Jogging	1.6%	1.5%	1.6%	1.1%	3.5%	0.0%

3. Use of other services

To gauge interest in other services that could be provided on the Pathway or in conjunction with it, respondents who had said that they would use the Pathway were asked to express their level of interest in renting a bicycle to cross the Pathway, in visiting a cafe on the Pathway, doing a bungy jump from the bridge or taking the Bridge Climb.

3.1 Rental bicycle

Respondents were asked whether, if they were to cycle over the Pathway, they would use their own bicycle or rent one if there was a convenient location for pick-up and drop-off.

Although 84% of respondents had already said that they would be pedestrians when they visited the Pathway, 28% said that if they were going to cycle, they would rent one. 30% said that they would neither rent nor use their own bicycle, suggesting that 30% is the core of Pathway users who would not be interested in cycling over the Pathway at any time.

Use own bicycle or rent	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Use own bicycle	31.0%	16.9%	32.2%	34.4%	33.4%	28.0%
Rent a bicycle if there was a convenient location for pick-up/drop-off	28.0%	43.0%	21.2%	23.8%	34.1%	25.6%
None of these	30.0%	28.8%	35.4%	33.6%	21.2%	34.5%
Not sure	10.9%	11.3%	11.2%	8.2%	11.2%	11.9%

Based on the scenarios in the volume modelling (see Section 8), the interest translates into the following volumes in the first year of the Pathway:

	Scenario		
	Low	Medium	High
Potential volumes	146,000	241,000	329,000

3.2 Cafe

Over 70% of those who would use the Pathway said that they would be prepared to use a cafe if one was established on the Pathway. A quarter of users would use the cafe most times.

Likely to stop at cafe	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Most times	25.1%	33.1%	23.1%	26.2%	22.4%	26.1%
Sometimes	46.4%	38.0%	41.8%	44.5%	52.9%	46.8%
Hardly ever	14.8%	14.0%	19.1%	16.2%	13.9%	11.6%
Never	4.4%	5.9%	4.2%	3.7%	3.7%	5.0%
Not sure	9.3%	8.8%	11.8%	9.4%	6.9%	10.5%

While 82% of users taking a longer trip over the Pathway would be likely to use the cafe sometimes or most times, 52% of those mostly making quick trips across the Pathway would also use it sometimes or most times (most times 17%). This has service/turnaround implications for a potential cafe operator.

Based on the scenarios in the volume modelling (see Section 8), the interest translates into the following volumes in the first year of the Pathway:

	Scenario		
	Low	Medium	High
Potential volumes	370,000	611,000	833,000

3.3 Bungy jump and bridge climb

30% of those who would use the Pathway said that they were interested in combining a bungy jump with a trip to the Pathway. Those who were interested were more likely to come from the North Shore or West Auckland.

Interested in bungy jump	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Very interested	10.5%	1.8%	13.8%	15.6%	9.8%	7.0%
Interested	20.4%	14.0%	13.2%	26.4%	22.8%	17.9%
Not very interested	26.1%	24.6%	29.6%	21.9%	27.4%	26.7%
Not interested at all	43.0%	59.5%	43.3%	36.1%	40.0%	48.4%

52% were also interested in combining a Bridge Climb with a Pathway visit. Most interest was from West Auckland residents.

Interested in Bridge climb	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Very interested	14.7%	11.3%	14.3%	22.3%	11.6%	12.6%
Interested	38.1%	36.5%	35.0%	34.9%	45.1%	35.5%
Not very interested	22.9%	32.6%	28.3%	20.6%	20.3%	22.4%
Not interested at all	24.3%	19.7%	22.4%	22.0%	23.0%	29.5%

Based on the scenarios in the volume modelling (see Section 8), the interest translates into the following volumes in the first year of the Pathway:

	Scenario		
	Low	Medium	High
Bungy jump	162,000	267,000	364,000
Bridge climb	271,000	448,000	610,000

4. Visitors to Auckland

Respondents who would use the Pathway were asked if they would be likely to take visitors from out of town over the Pathway. 84% said that they would, which suggests that the Pathway has the potential to become a common visitor venue. The most interest in doing this was from West Auckland and Central Auckland residents.

Take out-of-town visitors	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Yes	84.1%	80.9%	79.3%	87.5%	86.8%	81.7%
No	1.0%	3.0%	0.0%	0.8%	1.1%	0.7%
Not sure	14.8%	16.1%	20.1%	11.8%	12.0%	17.5%

5. Cycling over the Pathway to get to work or study

Although the primary thrust of this survey was to establish recreational use of the Auckland Harbour Bridge Pathway, respondents who said that they would use it were also asked if they would be likely to cycle over the Pathway to get to work or study. Note that this is a measure of cycling only; respondents were not asked a comparable question about walking across the bridge to get to work or study.

9% of those who would use the Pathway said that they would use it to cycle to get to work or study. The bulk of these people were resident in Central Auckland, the North Shore and West Auckland.

Likely to cycle over Pathway to get to work or study	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Yes	9.2%	1.5%	9.5%	15.1%	9.1%	5.5%
No, the distances are too great	10.6%	34.5%	17.8%	8.1%	9.3%	4.0%
No, it is not the direction I go to work or study	49.8%	33.6%	29.4%	52.2%	56.4%	58.9%
No, the roads are not suitable for cycling	3.1%	6.8%	6.5%	2.1%	3.3%	0.9%
No, for another reason	23.3%	21.8%	34.2%	18.5%	18.7%	25.0%
Not sure	4.0%	1.7%	2.6%	3.9%	3.3%	5.5%

Those who said that they would cycle to work or study were asked how frequently they would do that. Because only 9% would use it for this purpose, bases are small, but it is evident that a majority would use it no more than twice a week.

Frequency of cycle commute	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
4 or 5 times a week	37.9%	100.0%	28.2%	61.2%	30.0%	0.0%
1 or 2 times a week	42.6%	0.0%	58.8%	23.7%	43.8%	74.3%
Less than that	19.5%	0.0%	12.9%	15.8%	25.0%	20.2%

Avg number of times	2.4	4.5	2.2	3.2	2.1	1.2
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Base - would cycle over Pathway	73	1	16	24	31	11
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6. Value for money

All respondents were asked their opinion of the proposed tolls for crossing the Pathway – \$1.95 each way for a basic (quick) crossing and \$3.50 for an extended (longer) crossing time. With both scenarios, 50% of respondents indicated that the prices were fair value for money. However, comments made by respondents at the close of the survey indicated concerns with pricing and with the principle of tolling to cross the Pathway.

The effect of price has been taken into account in developing the volume models (see Section 7) by using the data from the value for money questions in the survey. It is recommended that this effect should be taken into account in using the model to inform the business case, as comments indicate that there is a risk of greater underlying resistance to price than is evident in respondents' answers to the pricing questions.

All comments are available from the Horizon Research online results system and it is recommended that these be read in conjunction with this report, particularly in relation to pricing.

6.1 Basic crossing for \$1.95 each way

27% overall thought that \$1.95 was excellent value for money, and it is evident that the further away from the bridge the respondent resided, the more they thought the price was excellent value (e.g. 32% of Manukau residents thought this). Similarly, the more frequently they were likely to use the Pathway, the more respondents thought that \$1.95 was excellent value for money.

14% thought that \$1.95 was poor value for money. 52% overall thought it was fair value for money.

Basic crossing for \$1.95 each way	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Excellent value for money	26.6%	29.8%	21.4%	23.1%	26.7%	31.6%
Fair value for money	52.3%	38.7%	60.1%	59.5%	50.2%	47.2%
Poor value for money	13.9%	27.4%	11.3%	9.0%	18.5%	11.9%
Don't know	7.1%	4.2%	7.2%	8.3%	4.4%	9.5%

6.2 Longer crossing for \$3.50 each way

The rating of excellent value for money was lower for the \$3.50 price for the longer trip. However, 51% overall still said that it was fair value for money.

Crossing plus access to viewing decks and exhibition areas for \$3.50 each way	Total	Auckland area				
		Rodney	North Shore	West Auckland	Central Auckland/Isthmus	Manukau/ East Auckland/ Papakura/ Franklin
Excellent value for money	19.8%	12.7%	13.5%	16.9%	22.2%	25.0%
Fair value for money	50.7%	50.7%	59.5%	58.9%	44.9%	45.1%
Poor value for money	21.0%	30.6%	18.7%	19.0%	25.4%	17.3%
Don't know	8.6%	6.0%	8.4%	5.1%	7.5%	12.7%

7. Comments

At the close of the survey, respondents were offered the opportunity to provide comments and 43% of them did so. 11% of the comments came from people who did not support the building of the Pathway, 10% from people who were neutral about it, and 79% from people who supported the Pathway.

Some themes emerging from the comments were:

- General support for the project.
- Suggestions that the pricing be simplified (e.g. charge \$1.50 or \$2 for a crossing, not \$1.95).
- Concern that the capital cost of the Pathway and on-going operating costs would become a burden on ratepayers.

- Concern that the capital would be better spent on other options, including as improving public transport or an alternative crossing.
- Support for the Pathway, but irritation that there would have to be a toll when a Pathway should have been part of the original bridge development.
- Support for the Pathway as another attraction for Auckland.

A sample of comments follows:

"I expect the majority of users will be tourists. The question is, compared with other things they can do while visiting Auckland, is this good value for money? Having cycled the Golden Gate bridge, and I think paid \$28 to rent a bicycle to do so, (though there was no toll for being on the bridge) I can say that I think some would do it in Auckland. I think your survey should have tested a range of prices in order to understand the likely elasticity. I will take visitors if the experience is brilliant, but not otherwise. Please don't make the price \$1.95. Make it a \$2 coin. Have a family pass that makes it easy for people to take this as a Sunday stroll. Have a frequent users pass for those who might use it many times a year. Don't let people with engineering backgrounds make the key decisions about how to price, to choose the colour scheme, or appoint the coffee vendor. An incredible coffee shop out in the middle could attract a line-up of people. A crap coffee shop will be of no value."

"I wonder how many people will actually use it regularly if it is built. It is a lot of money for what might end up to be another millstone round the ratepayer's neck if it doesn't pay for itself, which is what many of us feel will happen."

"I think the pathway is long overdue; I live in West Auckland now, but have lived the vast majority of my 46 years on the shore and is a pity this wasn't a reality years ago."

"I would far rather have a railway crossing the bridge and linking the Shore with the city than this. It is an idea but to me a railway is a more important issue. To me this is putting the railway on hold."

"I think it's a great idea and I would definitely take my children over and maybe ferry back to the city."

"I think this is a great investment for Auckland especially for our tourists that come and visit."

"Need to have good bus return for people who can only manage to walk one way. Car parking either end. Ability to buy just a drink or ice cream especially for children. Good wheelchair access."

"Re Experience charge. Vendors should be paying from profits. It is double dipping to ask for higher crossing fee when profit will be made from the experiences. Stopping to

view exhibitions/ Bungy / cafe etc would all add to the reasons for doing the crossing and hence increase traffic doing it. People more likely to go in groups as an outing, however \$7 per person for a family is a bit too rich. Maybe family concession should be considered.”

“Round it up to \$2”

“RULES: Cyclists (especially, the Lycra crowd) to give way to pedestrians. Also, will it be wide enough for all to use at the same time i.e. runners, walkers, cyclists? COST: How long would the cost be imposed - would it eventually be withdrawn once walkway paid for?”

“What an awesome idea: this is the first I have heard of this idea but I think it is fantastic.”

“I think adding a pathway would make the harbour bridge even more of an attraction. Most of our family live out of Auckland so this would be an awesome thing to take visitors to see - we'd bus or drive to the start and then walk into the city afterwards. But it would be an attraction in and of itself - we'd possibly just go up and back, stopping for a coffee or drink.”

8. Recreational user model

Based on the answers provided by respondents to the survey, a model has been built to calculate volumes of crossings of the Pathway and the expected toll revenue.

In the model:

- A crossing is defined as a trip from one side of the harbour to the other using the Pathway.
- A toll is charged for each crossing.
- A one-way trip is one crossing in the model; a two-way trip is two crossings.
- "longer" crossings are ones in which people take their time to take in the view and experience, as opposed to "quick" crossings where they just cross the bridge.

8.1 Assumptions

8.1.1. Estimates are modelled from the responses provided by respondents to the Auckland Harbour Bridge Pathway survey. Volumes are estimated from the Statistics NZ figures for the Auckland population 18+ years.

8.1.2. The estimates are constructed by Auckland area. We believe that the responses for frequency of use of the Pathway by West Auckland/Waitakere and Manukau/East Auckland/Papakura/Franklin residents are optimistic. We have not scaled area figures in the model, but we advise caution in interpreting the West Auckland/Waitakere and Manukau/East Auckland/Papakura/Franklin results.

8.1.3. When asked in surveys whether they will do something (for example, travel somewhere or change brands), people consistently overestimate their behaviour. Based on previous research on estimating event attendance in Auckland, we would expect between 20% and 45% of those who say they will attend an event to actually do so. Discussion with other marketing research professionals has indicated similar behaviour versus intention ratios of 20% for brand switching. In other words, even if a respondent says that they will definitely change; there is only a 20% probability of them doing so.

In this survey, however, there is strong support for the Pathway and no actual event date (i.e. people can cross in a time frame of their choice). It is therefore possible that, in the first year at least, the number of crossings could be at the high end of the 20% to 45% range. We have therefore presented the estimates figures as a range of 20% to 45%.

8.1.4. The model combines the answers to the following questions in deriving trip estimates:

Q2:	Strength of support for the Pathway
Q3 and Q4:	Frequency of intended use
Q1:	Respondent's Auckland area
Q5:	Intended main type of trip (quick v longer)
Q6:	Intended 2 way or one way crossing
Q14.1 and Q14.2:	Toll value for money for quick crossings (\$1.95) and longer crossings (\$3.50)

8.1.5. Strength of support for the Pathway has been built into the model as a potential proxy for strength of intention to cross. The relative levels of support for the Pathway, as a % of respondents, are:

- Very supportive: 48%
- Support: 33%
- Neutral: 12%
- Don't Support: 3%
- Very unsupportive: 2%
- Not sure: 2%

8.1.6. The model has been built to allow each level of support for the Pathway to be allocated an individual probability of following through on intention to use the Pathway. However, for the purposes of these initial estimates, the probability of acting on the intention to use the Pathway from Q3 and Q4 from the survey has been set as follows:

Support for Pathway	Low	Medium	High
Very supportive	20%	33%	45%
Support:	20%	33%	45%
Neutral	20%	33%	45%
Don't Support	20%	33%	45%
Very unsupportive	20%	33%	45%
Not sure	20%	33%	45%

8.1.7. In the model the following average number of trips (single or return crossings) has been used when calculating the effect of Q3 and Q4:

How likely would you be to use the Pathway for recreational visits?	Avg used
Never	0.0
Once in the first year	1.0
Two or three times in the first year	2.5
At least four times in the first year	4.0
Not sure	0.0

8.1.8. In the model the following number of crossings (i.e. one-way) has been used when calculating the effect of Q6:

Would your recreational trips mainly be:	No. crossings used in model
A return trip using the Pathway both ways	2
One-way trip across the Pathway, returning using another way, such as ferry or bus	1
Not sure	1

8.1.9. In the model the percentages of those who say they would take a “quick” trip as opposed to a “longer” trip are used to separate trip type and calculate toll revenue

8.1.10. Responses from people who say they would never use the Pathway have no negative effect on volumes in the model.

8.1.11. The survey cannot determine the reaction of people to the experience of crossing the Pathway once it is built. We have therefore also provided an estimate (Estimate C) of volumes if people who said they would cross the Pathway multiple times only went to the Pathway once.

8.2 Estimates

Use of these estimates A, B or C for business case purposes is at the discretion of the client. These are best estimates for which no warranty is provided nor implied.

Estimate A - Complete model including effect of Price

Estimate A1: 20% probability of action (all “crossings” are one-way)

	Total	Rodney	North Shore	West Auckland/ Waitakere	Auckland	Manukau/ East Auckland/ Papakura/ Franklin
Number of Trips - First year						
Estimated quick crossings	119832	3887	36744	12536	45173	21492
Toll value quick crossings @\$1.95 including GST	\$233,672	\$7,580	\$71,651	\$24,445	\$88,087	\$41,909
Estimated longer crossings	401878	20091	56359	86101	139354	99973
Toll value longer crossings @\$3.50 including GST	\$1,406,573	\$70,319	\$197,257	\$301,354	\$487,739	\$349,906
Crossings Per day (assumes 365 days per year operation)	1430	66	255	270	506	333
Crossings per hour (assumes 17 hours per day operation)	85	4	15	16	30	20

Number of Trips - Subsequent years

Estimated quick crossings	98054	2381	30196	10374	36249	18854
Toll value quick crossings @\$1.95 including GST	\$191,205	\$4,643	\$58,882	\$20,229	\$70,686	\$36,765
Estimated longer crossings	360061	12715	47001	69355	113360	117630
Toll value longer crossings @\$3.50 including GST	\$1,260,214	\$44,503	\$164,504	\$242,743	\$396,760	\$411,705
Crossings Per day (assumes 365 days per year operation)	1254	41	211	218	410	374
Crossings per hour (assumes 17 hours per day operation)	73	2	12	13	24	22

Estimate A2: 33% probability of action (all “crossings” are one-way)

	Total	Rodney	North Shore	West Auckland/ Waitakere	Auckland	Manukau/ East Auckland/ Papakura/ Franklin
Number of Trips - First year						
Estimated quick crossings	197729	6414	60631	20684	74537	35463
Toll value quick crossings @\$1.95 including GST	\$385,572	\$12,507	\$118,230	\$40,334	\$145,347	\$69,153
Estimated longer crossings	663092	33147	92990	142065	229934	164956
Toll value longer crossings @\$3.50 including GST	\$2,320,822	\$116,015	\$325,465	\$497,228	\$804,769	\$577,346
Crossings Per day (assumes 365 days per year operation)	2358	108	421	446	834	549
Crossings per hour (assumes 17 hours per day operation)	138	6	25	26	49	32

Number of Trips - Subsequent years

Estimated quick crossings	161787	3928	49825	17117	59808	31109
Toll value quick crossings @\$1.95 including GST	\$315,485	\$7,660	\$97,159	\$33,378	\$116,626	\$60,663
Estimated longer crossings	594109	20984	77552	114433	187049	194091
Toll value longer crossings @\$3.50 including GST	\$2,079,382	\$73,444	\$271,432	\$400,516	\$654,672	\$679,319
Crossings Per day (assumes 365 days per year operation)	2070	68	349	360	676	617
Crossings per hour (assumes 17 hours per day operation)	112	4	21	21	40	36

Estimate A3: 45% probability of action (all “crossings” are one-way)

	Total	Rodney	North Shore	West Auckland/ Waitakere	Auckland	Manukau/ East Auckland/ Papakura/ Franklin
Number of Trips - First year						
Estimated quick crossings	269634	8746	82679	28207	101642	48360
Toll value quick crossings @\$1.95 including GST	\$525,786	\$17,055	\$161,224	\$55,004	\$198,202	\$94,302
Estimated longer crossings	904222	45199	126806	193725	313549	224943
Toll value longer crossings @\$3.50 including GST	\$3,164,777	\$158,197	\$443,821	\$678,038	\$1,097,422	\$787,301
Crossings Per day (assumes 365 days per year operation)	3217	148	574	608	1138	749
Crossings per hour (assumes 17 hours per day operation)	190	9	34	36	67	44

Number of Trips - Subsequent years

Estimated quick crossings	220620	5357	67941	23341	81559	42422
Toll value quick crossings @\$1.95 including GST	\$430,209	\$10,446	\$132,485	\$45,515	\$159,040	\$82,723
Estimated longer crossings	810143	28615	105753	156047	255060	264668
Toll value longer crossings @\$3.50 including GST	\$2,835,501	\$100,153	\$370,136	\$546,165	\$892,710	\$926,338
Crossings Per day (assumes 365 days per year operation)	2823	93	476	491	922	841
Crossings per hour (assumes 17 hours per day operation)	165	5	28	29	54	49

Estimate B - Complete model excluding effect of Price (assumes that tolls are acceptable to all)

Estimate B1: 20% probability of action (all “crossings” are one-way)

	Total	Rodney	North Shore	West Auckland/ Waitakere	Auckland	Manukau/ East Auckland/ Papakura/ Franklin
Number of Trips - First year						
Estimated quick crossings	138965	5381	40423	13496	55520	24145
Toll value quick crossings @\$1.95 including GST	\$270,982	\$10,493	\$78,825	\$26,317	\$108,264	\$47,083
Estimated longer crossings	448062	26862	61029	93213	170090	96868
Toll value longer crossings @\$3.50 including GST	\$1,568,217	\$94,017	\$213,602	\$326,246	\$595,315	\$339,038
Crossings Per day (assumes 365 days per year operation)	1608	88	278	292	618	332
Crossings per hour (assumes 17 hours per day operation)	94	5	16	17	36	20

Number of Trips - Subsequent years

Estimated quick crossings	103999	3264	32748	11111	44103	12773
Toll value quick crossings @\$1.95 including GST	\$202,798	\$6,365	\$63,859	\$21,666	\$86,001	\$24,907
Estimated longer crossings	375443	16890	50602	74606	137881	95464
Toll value longer crossings @\$3.50 including GST	\$1,314,051	\$59,115	\$177,107	\$261,121	\$482,584	\$334,124
Crossings Per day (assumes 365 days per year operation)	1314	55	228	235	499	297
Crossings per hour (assumes 17 hours per day operation)	76	3	13	14	29	17

Estimate B2: 33% probability of action (all “crossings” are one-way)

	Total	Rodney	North Shore	West Auckland/ Waitakere	Auckland	Manukau/ East Auckland/ Papakura/ Franklin
Number of Trips - First year						
Estimated quick crossings	229292	8879	66695	22267	91611	39840
Toll value quick crossings @\$1.95 including GST	\$447,119	\$17,314	\$130,055	\$43,421	\$178,641	\$77,688
Estimated longer crossings	739300	44321	100697	153802	280647	159833
Toll value longer crossings @\$3.50 including GST	\$2,587,550	\$155,124	\$352,440	\$538,307	\$982,265	\$559,416
Crossings Per day (assumes 365 days per year operation)	2654	146	459	482	1020	547
Crossings per hour (assumes 17 hours per day operation)	156	9	27	28	60	32

Number of Trips - Subsequent years

Estimated quick crossings	171599	5385	54035	18333	72771	21075
Toll value quick crossings @\$1.95 including GST	\$334,618	\$10,501	\$105,368	\$35,749	\$141,903	\$41,096
Estimated longer crossings	619487	27873	83496	123097	227504	157517
Toll value longer crossings @\$3.50 including GST	\$2,168,205	\$97,556	\$292,236	\$430,840	\$796,264	\$551,310
Crossings Per day (assumes 365 days per year operation)	2167	91	377	387	823	489
Crossings per hour (assumes 17 hours per day operation)	127	5	22	23	48	29

Estimate B3: 45% probability of action (all “crossings” are one-way)

	Total	Rodney	North Shore	West Auckland/ Waitakere	Auckland	Manukau/ East Auckland/ Papakura/ Franklin
Number of Trips - First year						
Estimated quick crossings	269634	8746	82679	28207	101642	48360
Toll value quick crossings @\$1.95 including GST	\$525,786	\$17,055	\$161,224	\$55,004	\$198,202	\$94,302
Estimated longer crossings	904222	45199	126806	193725	313549	224943
Toll value longer crossings @\$3.50 including GST	\$3,164,777	\$158,197	\$443,821	\$678,038	\$1,097,422	\$787,301
Crossings Per day (assumes 365 days per year operation)	3217	148	574	608	1138	749
Crossings per hour (assumes 17 hours per day operation)	190	9	34	36	67	44

Number of Trips - Subsequent years

Estimated quick crossings	220620	5357	67941	23341	81559	42422
Toll value quick crossings @\$1.95 including GST	\$430,209	\$10,446	\$132,485	\$45,515	\$159,040	\$82,723
Estimated longer crossings	810143	28615	105753	156047	255060	264668
Toll value longer crossings @\$3.50 including GST	\$2,835,501	\$100,153	\$370,136	\$546,165	\$892,710	\$926,338
Crossings Per day (assumes 365 days per year operation)	2823	93	476	491	922	841
Crossings per hour (assumes 17 hours per day operation)	165	5	28	29	54	49

Estimate C – Assumes that everyone who says they will cross at least once will do so once

(All “crossings” are one-way)

	Total	Rodney	North Shore	West Auckland/ Waitakere	Auckland	Manukau/ East Auckland/ Papakura/ Franklin
<u>Number of Trips - First year</u>						
Estimated quick crossings	309258	13233	99066	29187	109290	58482
Toll value quick crossings @\$1.95 including GST	\$603,053	\$25,804	\$193,179	\$56,915	\$213,116	\$114,040
Estimated longer crossings	1011167	61731	133889	209628	356527	249392
Toll value longer crossings @\$3.50 including GST	\$3,539,085	\$216,059	\$468,612	\$733,698	\$1,247,845	\$872,872
Crossings Per day (assumes 365 days per year operation)	3616	205	638	654	1276	843
Crossings per hour (assumes 17 hours per day operation)	213	12	38	38	75	50
<u>Number of Trips - Subsequent years</u>						
Estimated quick crossings	311474	12842	100465	27013	103366	67788
Toll value quick crossings @\$1.95 including GST	\$607,374	\$25,042	\$195,907	\$52,675	\$201,564	\$132,187
Estimated longer crossings	1096292	61154	126516	189201	340696	378725
Toll value longer crossings @\$3.50 including GST	\$3,837,022	\$214,039	\$442,806	\$662,204	\$1,192,436	\$1,325,538
Crossings Per day (assumes 365 days per year operation)	3857	203	622	592	1217	1223
Crossings per hour (assumes 17 hours per day operation)	228	12	37	35	72	72

APPENDIX 1 – SAMPLE

Sample

1083 people who are members of the Horizon Research HorizonPoll panel (which is representative of the New Zealand population aged 18+ at the 2006 census), live within the Auckland Council area and responded to the survey between 28 September and 3 October 2012.

The sample is weighted on age, gender, ethnicity, personal income, and employment status and education level to reflect Auckland population demographics. It has a maximum margin of error at a 95% confidence level of $\pm 3.0\%$ overall.

Respondent comments

All comments from respondents are captured as entered by respondents and are available from the Horizon Research system online.

Contact

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