

# **NENAGH-LIMERICK COMMUTER RAIL LINK MARKET RESEARCH STUDY**



**Prepared for: Nenagh Rail Steering Committee in association  
with Nenagh Town Council and North Tipperary  
County Council.**

**Prepared by: Retail Research Services Ltd.**

**Date: July 5<sup>th</sup> 2005**

## TABLE OF CONTENTS

Introduction - purpose of the study .....	3
Executive summary .....	4
Research methodology .....	5
Households with commuters .....	7
Mode of transport and journey duration .....	8
Usual start time .....	9
Do drivers usually have to pay for parking? .....	10
Level of interest in the proposed service .....	11
Level of interest, by area .....	12
Likelihood of using the service .....	14
Reasons some people might not use the service.....	16
Distance of Limerick station from place of work .....	18
Would a 7 a.m. departure time be suitable?.....	19
Do the proposed return times suit? .....	20
Key factors that would influence use of the service .....	21
Importance of an integrated ticket service.....	23
Do people see the train as a more environmentally friendly option?.....	24
Would people use the rail link for shopping in Limerick? .....	25
Population growth in the survey area .....	26
Estimated usage levels of the proposed service .....	27
Conclusion .....	29
Appendix 1: Map of likely usage, by area.....	30
Appendix 2: Commuters' current morning start times by area .....	31

## **Introduction – purpose of the study**

Nenagh Town Council commissioned Retail Research Services Ltd. to conduct a market research study into the level of commuter interest in using a daily commuter rail service between Nenagh and Limerick. The purpose of this research study was to provide information to enable an assessment of the viability of the proposed service, which would also serve Birdhill and Castleconnell. In order to assess whether such a service would be viable, it was necessary to establish:

1. How many households there were in the hinterland of Nenagh, Birdhill and Castleconnell.
2. What percentage of these households had someone commuting daily to Limerick city?

It was also necessary to interview a sample of these commuters in order to establish their level of interest and likely use of a commuter rail service if one were available. Specifically, the study set out to establish:

3. How many people in each household travel to Limerick to work or study each day?
4. What mode of transport do they currently use?
5. If they travel by car, how long does their journey usually take?
6. What time do they normally start their journey?
7. Do they usually have to pay for parking?
8. How interested would commuters be in using a commuter rail service from Nenagh to Limerick?
9. How likely would they be to use the service on a regular basis?
10. What reasons would those unlikely to use the service have for not using it?
11. How far would likely users have to travel onward from Limerick Station to their place of work or study?
12. Would a departure time of 7 a.m. from Nenagh and an arrival time of 7.50 a.m. be suitable for them?
13. Would any other morning departure times be more suitable?
14. Would one of the Limerick return times of 4.30 or 6.30 be suitable for commuters?
15. Are there any other return times that would be more suitable?
16. What would be the key factors that would decide whether commuters would use the service or not?
17. If an integrated rail and bus ticket service were available for onward bus journeys from Limerick station, how important would this be to commuters?
18. Would commuters see the train as a more environmentally friendly option?
19. Bearing in mind the proposed 7 a.m. departure time from Nenagh, Do commuters think that anyone in their households would use the service for shopping in Limerick?

## **Executive summary**

Retail Research Services Ltd. conducted a survey into people's likely usage of a daily rail commuter service between Nenagh and Limerick. A total of 2,222 households in 36 district electoral divisions were contacted by telephone. 304 households (13.7%) had people commuting daily to Limerick. 265 interviews were achieved with those commuters. The average number of commuters per household was 1.35 persons.

91% of the commuters interviewed travelled in their own car, while 7% travelled by bus. Just 2% travelled with someone else. The average journey duration was about 36 minutes.

78% of the commuters surveyed start their journey from 7.30 onwards. Just 21% of drivers have to pay for parking. 37% of the commuters surveyed said they would be very interested in using the proposed service, while a further 17% said they would be somewhat interested.

29% of commuters said they would be very likely to use the proposed service on a regular basis, while a further 26% said they would be somewhat likely to use it. Most of the people who indicated that they would be likely to use the service work less than three miles from the station in Limerick.

Factors limiting uptake of the rail service would be the flexibility of travelling by car, a preference for travelling by car and workplace distance from Limerick train station.

For more than half of the likely users, a 7 a.m. departure time would be unsuitable. A range of other times was suggested. While 8 a.m. was the most common suggestion, no single start time suited everybody.

The two afternoon/evening return times of 4.30 and 6.30 suit most people. However, a quarter of the likely users indicated that these return times would not suit them. A range of other return times was suggested, but no single time was strongly preferred by most people.

The key factors that would affect whether people would use the train service are convenience, price, departure time, onward distance to destination, arrival time, availability of linking buses and reliability of the service.

A number of people working on the National Technological Park emphasised that they would only use the service if they could get off the train in Castleconnell and get a bus to the National Technological Park or to the University from there.

A total of 40% of commuters considered an integrated ticketing service to be important. 25% considered it very important. 93% of the commuters surveyed said they would see the train as a more environmentally friendly option. A quarter of commuters said that someone in their household would use the service for shopping in Limerick.

From responses obtained in the survey, it appears that just under 4% of households in the survey area would have someone who is very likely to use the proposed service. Based on 4% of an estimated 11,735 households in the survey area, this would be equivalent to 466 persons very likely to use the train. Allowing for different preferred morning departure times, the estimate for people likely to use the train at a departure time between 7.45 and 8.a.m. would be 168 people.

## **Research methodology**

Retail Research Services Ltd. conducted a telephone survey of households in an area representing the potential catchment area for users of the commuter rail service. The areas to be surveyed were agreed with representatives of Nenagh Town Council and Iarnrod Eireann. The survey area was then mapped and the district electoral divisions within it were identified. The population of these district electoral divisions at the 2002 census was used as the starting point for sampling purposes for this survey. An interview quota for each district electoral division was set based on its population. Households within the selected District Electoral Divisions were then surveyed at random.

The survey was conducted using computer-aided telephone interviewing (CATI). Scripted on-screen interviews were inputted directly into computers by telephone interviewers operating from a call centre in Limerick. CATI software was then used to analyse the commuter responses to each question and to create tables and charts of the research results.

A target of 500 completed interviews was set for the survey. In the event, this proved to be impracticable due to the sheer number of telephone calls that had to be made in order to secure each interview with an identified commuter. Ultimately, 265 interviews were achieved with commuters, having contacted 2,222 households in the target area. These 2,222 contacts were the result of almost 8,000 dialling attempts. The areas surveyed, their population, estimated households and interviews achieved are shown overleaf. The average household size was estimated at 3.4 persons.

## Survey areas

District Electoral Division	Persons 2002	Estimated households 2002	Survey quota (500 sample)	Interviews achieved
Ardcrony	451	133	8	6
Ballina	1715	504	30	23
Ballygibbon	490	144	8	4
Ballylusky	267	79	5	1
Ballymackey	505	149	9	3
Ballynaclogh	651	191	11	7
Birdhill	585	172	10	9
Borrisokane	1172	345	20	0
Burgesbeg	413	121	7	4
Carrigatogher	635	187	11	8
Castleconnell	2665	784	46	40
Castletown	1216	358	21	1
CloghJordan	739	217	13	1
Cloghprior	238	70	4	2
Derrycastle	349	103	6	4
Dolla	214	63	4	2
Finnoe	159	47	3	1
Greenhall	235	69	4	3
Kilbarron	576	169	10	0
Kilcomenty	580	171	10	10
Kilkeary	531	156	9	4
Killoscully	314	92	5	4
Kilmore	579	170	10	3
Kilnaneave	475	140	8	8
Kilnarath	302	89	5	5
Knigh	678	199	12	6
Lackagh	20	6	0	0
Latteragh	639	188	11	4
Mertonhall	169	50	3	2
Monsea	632	186	11	6
Nenagh Rural	1710	503	29	18
Nenagh Urban	6115	1799	105	38
Newport	1641	483	28	26
Terryglass	504	148	9	4
Uskane	195	57	3	0
Youghalarra	625	184	11	8
Total	28,984	8,525	500	265

Note: No interviews were achieved with commuters in four areas: Borrisokane, Kilbarron, Lackagh and Uskane. In these areas, no households with commuters to Limerick were identified from the phone numbers available.

A map of the survey area is shown in Appendix 1.

## Households with commuters

Table 1 shows the number of households with commuters identified from 2,222 connected calls.

**Table 1: Households with commuters**

Interview achieved	No. of respondents	% of respondents
Base	304	100%
Yes	265	87%
No	39	13%

Table 1 shows that 304 of the 2,222 households contacted had someone commuting to Limerick daily. In 39 of the 304 households no interview could be achieved because the commuter was either unavailable for interview or unwilling to participate in the survey.

304 households with commuters represent 13.7% of the 2,222 households contacted.

In each of these 304 households, the person who answered the phone was asked how many people in the household commute to Limerick daily. Table 2 summarises the answers.

**Table 2: Number of commuters per household**

Total households surveyed	Households with commuters	% of total households	Average number of commuters	Total commuters
2,222	304	13.7%	1.35	410

Table 2 shows that 13.7% of the households contacted had someone commuting to Limerick on a daily basis. The average number of people per household who were commuting was 1.35 persons. This gives a total of 410 commuters among the 304 households concerned.

The 2002 census of population gives a population of 28,984 in the area surveyed. Using an average household size of 3.4 persons (the national average) gives an estimated number of 8,525 households in the survey area (2002 figures).

Applying the figures from table 2 to the 8,525 households in the survey area yields an estimate of 1,575 people commuting daily to Limerick, from an estimated 1,167 households.

## Mode of transport and journey duration

Those commuters who took part in the survey were asked how they travelled to Limerick. The mode of transport used is shown in Figure 1.

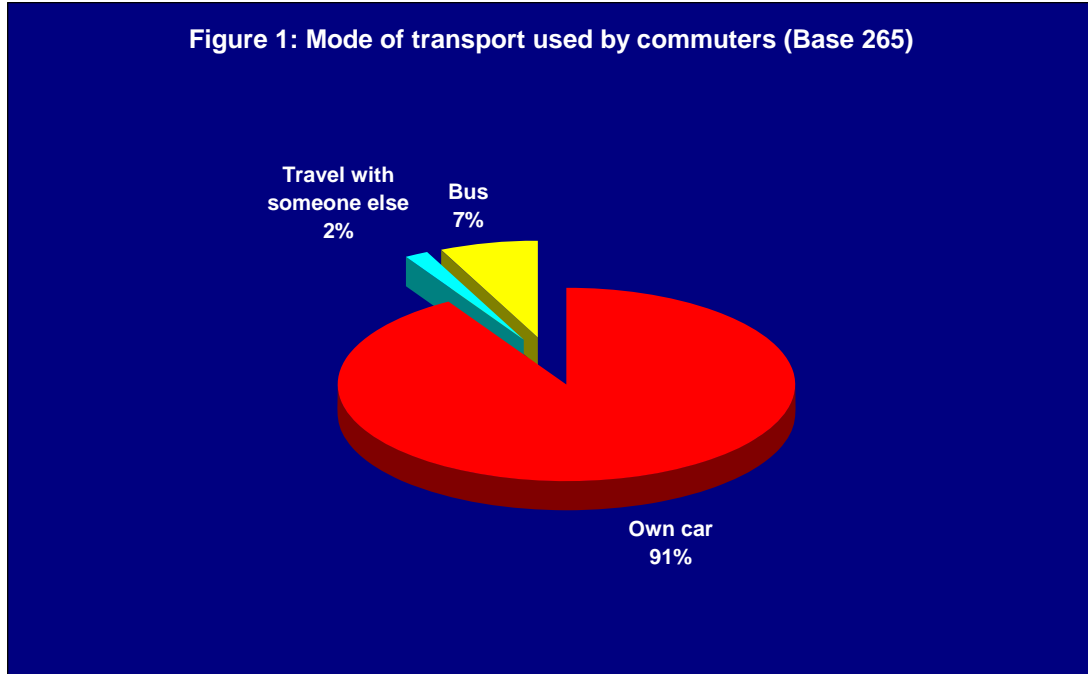


Figure 1 shows that, of the 265 commuters interviewed, 91% travelled in their own car. Just 7% of the commuters surveyed travelled by bus, while 2% got a lift.

Those 246 commuters who used their own cars were asked how long their journey typically took. Table 3 analyses the data gained from this question.

**Table 3: Journey duration**

Base	Count	Mean	Median	Minimum	Maximum
2,222	241	35.9	37.5	10	70

Table 3 shows that the average (mean) journey lasted just under 36 minutes. The shortest journey duration was 10 minutes while the longest was 70 minutes.

## Usual start time

Commuters were asked what their usual start time was in the morning. Table 4 summarises the responses.

**Table 4: Journey start time**

	No. of respondents	% of respondents
Base	265	100%
Before 5.30	1	0%
5.30		0%
5.45		0%
6.00		0%
6.15	2	1%
6.30	5	2%
6.45	11	4%
7.00	20	8%
7.15	21	8%
7.30	32	12%
7.45	40	15%
8.00	44	17%
8.15	27	10%
8.30	23	9%
8.45	8	3%
9.00	18	7%
After 9	13	5%

Table 4 shows that 78% of the commuters surveyed start their journey from 7.30 on.

A breakdown of start times by district electoral division is shown in Appendix 1.

## Do drivers usually have to pay for parking?

Those commuters who drive themselves each day were asked if they usually had to pay for parking. Figure 2 summarises the pattern of responses to this question.

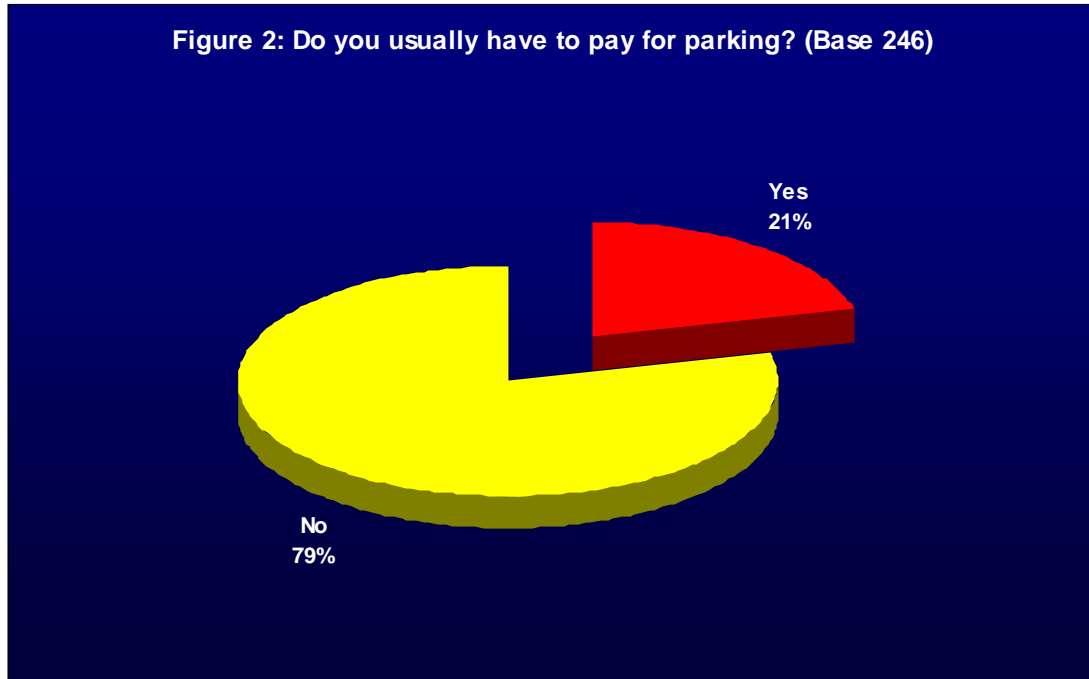


Figure 2 shows that 21% of those who drive to work or study in Limerick usually have to pay for parking while 79% do not.

## **Level of interest in the proposed service**

All of the commuters interviewed were asked how interested they would be in using a daily service from Nenagh to Limerick, also serving Birdhill and Castleconnell. An indicative price of €6 return was used in this question. Table 5 summarises the responses.

**Table 5: Interest in using the proposed service**

	No. of respondents	%
Base	265	100%
Very interested	97	37%
Somewhat interested	46	17%
Slight interest	32	12%
No interest	89	34%
Don't know/depends	1	0%

Table 5 shows that 37% of the commuters surveyed said they would be very interested in using the proposed service, while a further 17% said they would be somewhat interested. 34% of those surveyed said they had no interest in using the service.

These figures indicate that there was a good level of interest in using the service. Figure 3 on the next page gives a visual representation of the level of interest, by district electoral division.

## Level of interest, by area

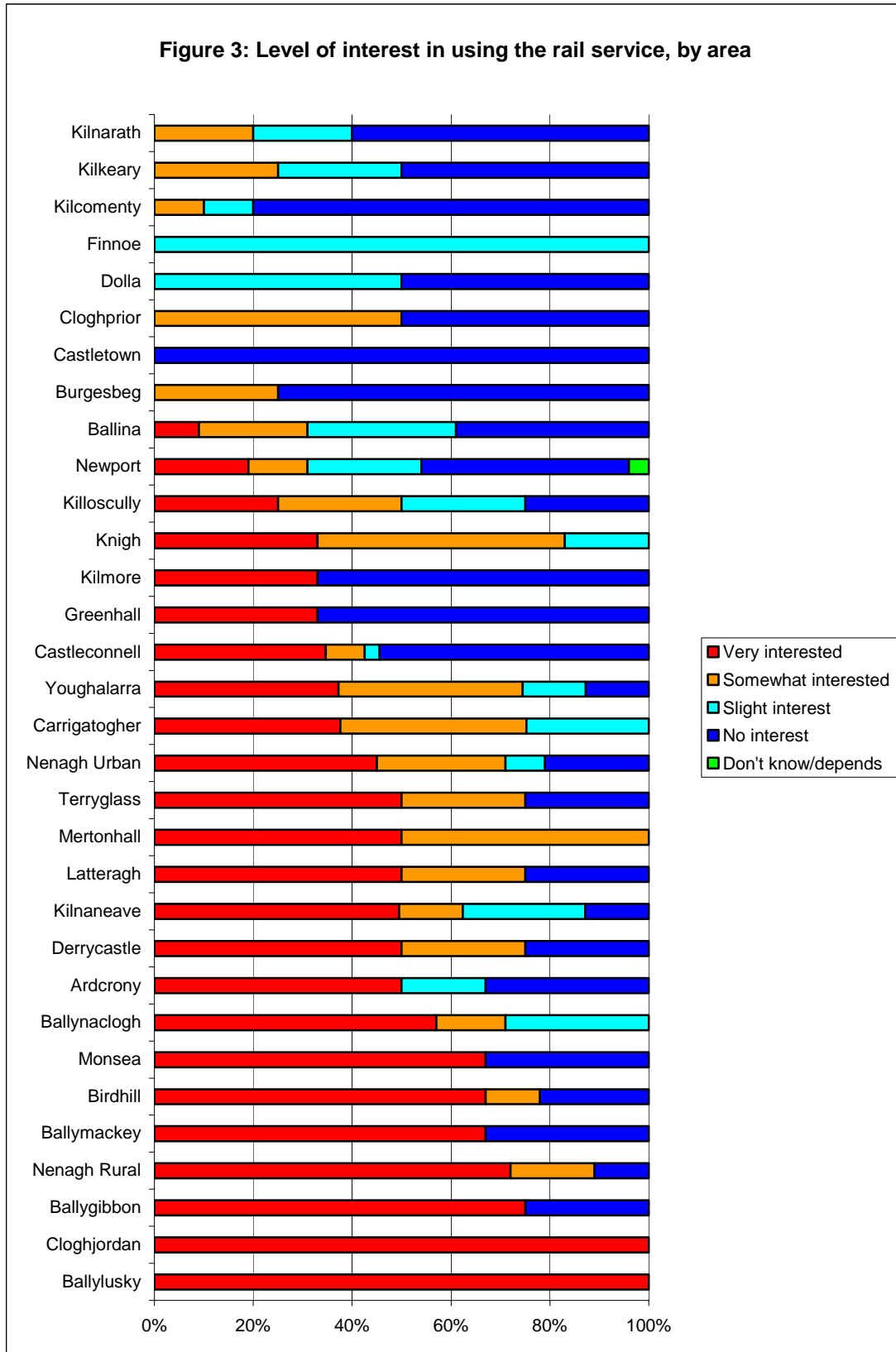


Figure 3 shows that the areas where commuters had the greatest level of interest in using the proposed service were:

- Ballylusky
- CloghJordan
- Ballygibbon
- Nenagh Rural
- Ballymackey
- Birdhill
- Monsea
- Ballynaclogh
- Ardcrony
- Derrycastle
- Kilnaneave
- Mertonhall
- Terryglass
- Nenagh Urban
- Carrigatogher
- Youghalarra
- Castleconnell
- Greenhall
- Kilmore
- Knigh

This analysis shows that there was a good spread of areas where people were interested in using the rail service.

## Likelihood of using the service

All of the commuters surveyed were asked how likely they would be to use the rail commuter service on a regular basis. Table 6 shows the pattern of responses to this question.

**Table 6: Likelihood of using the service regularly**

	No. of respondents	% of respondents
Base	265	100%
Very likely	76	29%
Somewhat likely	70	26%
Somewhat unlikely	40	15%
Very unlikely	75	28%
Don't know/depends	4	2%

Table 6 shows that 29% of the commuters surveyed said they would be very likely to use the service on a regular basis, while a further 26% would be somewhat likely to use it.

Likelihood of using the service is probably a more direct and accurate predictor of consumer behaviour than their level of interest. While consumers may be interested in the service, some may still not use it due to other factors. However, a direct question on how likely they would personally be to use it is more useful.

Figure 4 overleaf shows how likely people would be to use the service, broken down by area.

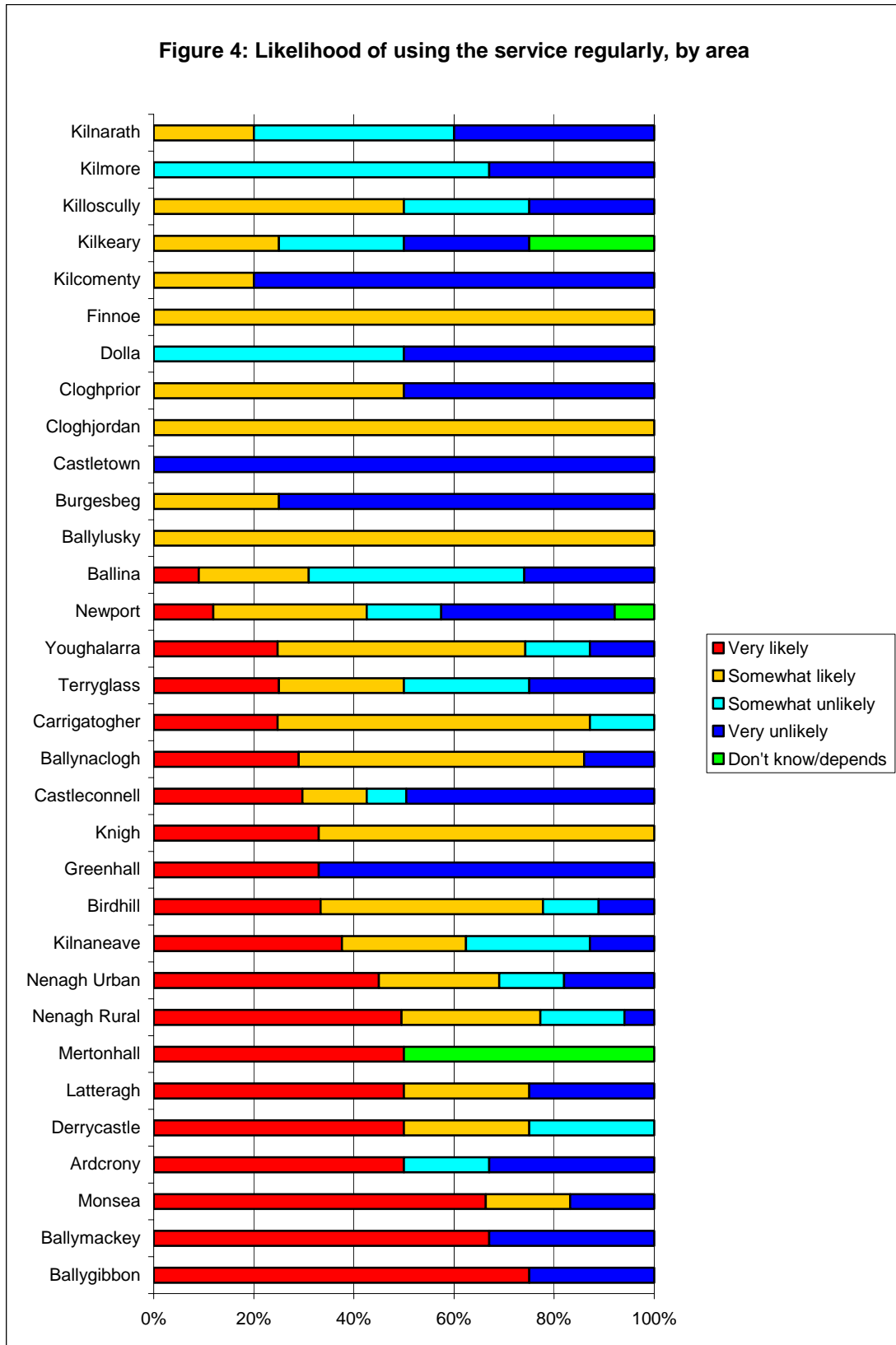


Figure 4 shows that the areas with the highest probability of using the service regularly are the same areas where interest was highest.

## Reasons some people might not use the service

Those commuters who indicated that they would not be likely to use the service were asked why not. 119 commuters fell into this category. Table 7 shows the main reasons given.

**Table 7: Reasons for not using the service**

	No. of respondents	% of respondents
Base	119	100%
No reply	22	18%
Travelling by car is more flexible	62	52%
Prefer travelling by car	27	23%
Need to use car during work anyway	18	15%

### Other comments

- Only work half days, so can't see it suiting and work a bit outside town
- Children
- Children
- Do shift work, one time one week, and another the next
- Doesn't seem cheaper than petrol, has to travel on to work
- Don't work near city
- Drop kids to school in car. Travelling in car anyhow. Got to get to Raheen
- Finishing college this week and plan to work in the Nenagh area from then on
- Going on to work where there's no bus route. Would have to get cab from station
- Has to bring daughter to school
- Have children to drop off at school along the way
- Have to bring baby to a crèche and work on Nenagh side of Limerick
- Have to bring children to school
- Have to drop off a child at nursery so it wouldn't be convenient
- Heading to Birdhill is going in the wrong direction for him
- It's easier to travel from Ballina to limerick rather than going to Nenagh
- Just bought a car to drive to work as it is more reliable
- Lives in Newport so it's of no benefit to her
- Need to drive from Ballina, if there was a bus service provided to Birdhill he would use it
- Need your car for going shopping. Thinks a good idea for college
- No advantage, as I work in Raheen
- Not convenient to where I work
- Not convenient to where I work now, would be too far away from my place of work
- Not suitable for where I work
- Not suited. Would be too far away from place of work
- Only travel to Castletroy
- Outside the city. Too far
- Place of work is too far away from the station
- The train service needs to be run efficiently i.e. On time and clean
- There is not as much traffic at nine in the morning so car is quick and easy
- Time is too long
- Too far away from the nearest train station
- Travel by Kavanagh's bus at the moment. From Daly's cross is only two euro
- Travelling by bus is handier
- Usually gets a bus. Has no transportation to train station in Birdhill
- When come off the train, my place of work would be too far away, out the Shelbourne road
- Work at different times, different weeks

- Work evening shifts, so the time would have to suit.
- Work halfway between Castleconnell and limerick. Train would not stop where I want it to
- Work in Raheen, so it would not be convenient for me
- Work in Raheen. Travelling by public transport would take longer than in own car
- Work on Castletroy side of limerick so faster by car
- Work shift work, mainly at night
- Work too far from station
- Works on the Nenagh side of Limerick. Departure time is too early.
- Would be no use, as I am only about six miles from work, and the train wouldn't stop there
- Would be no use, because I work shift hours, different weeks
- Would be not suitable to where I work
- Would have to drive 2 and a half miles to get to the train station
- Would not be convenient, train station is too far away. Easier to go by car
- Would not be convenient to where I work, would have to get a bus, after getting off.
- Would not be convenient when I got off train, would have to take a bus or taxi

Table 7 and the additional comments listed indicate that the flexibility of travelling by car, a preference for travelling by car and workplace distance from the train station would be key factors limiting uptake of the service.

## Distance of Limerick station from place of work

Those commuters who indicated that they would be likely to use the commuter rail service were asked how far they would have to travel onwards from the train station. Figure 4 summarises the responses to this question.

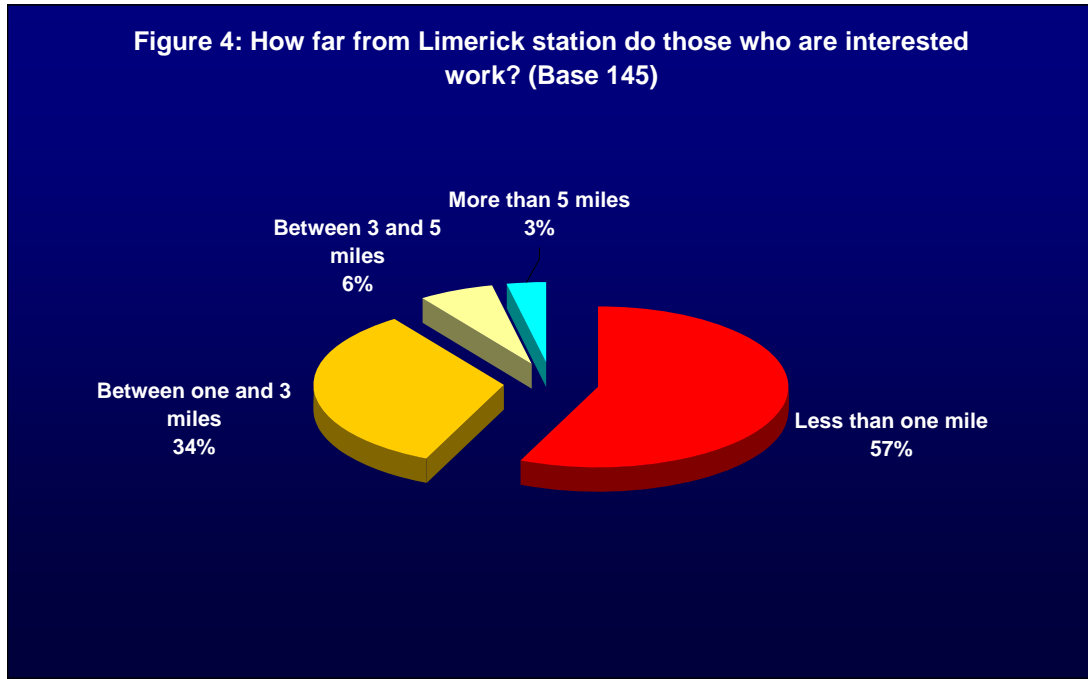


Figure 4 shows that most of the people who indicated that they would be likely to use the service work less than three miles from the station in Limerick.

## Would a 7 a.m. departure time be suitable?

All of the people who indicated that they would be likely to use the train service were asked if the 7 a.m. departure time from Nenagh station would be suitable. Figure 5 shows the responses.

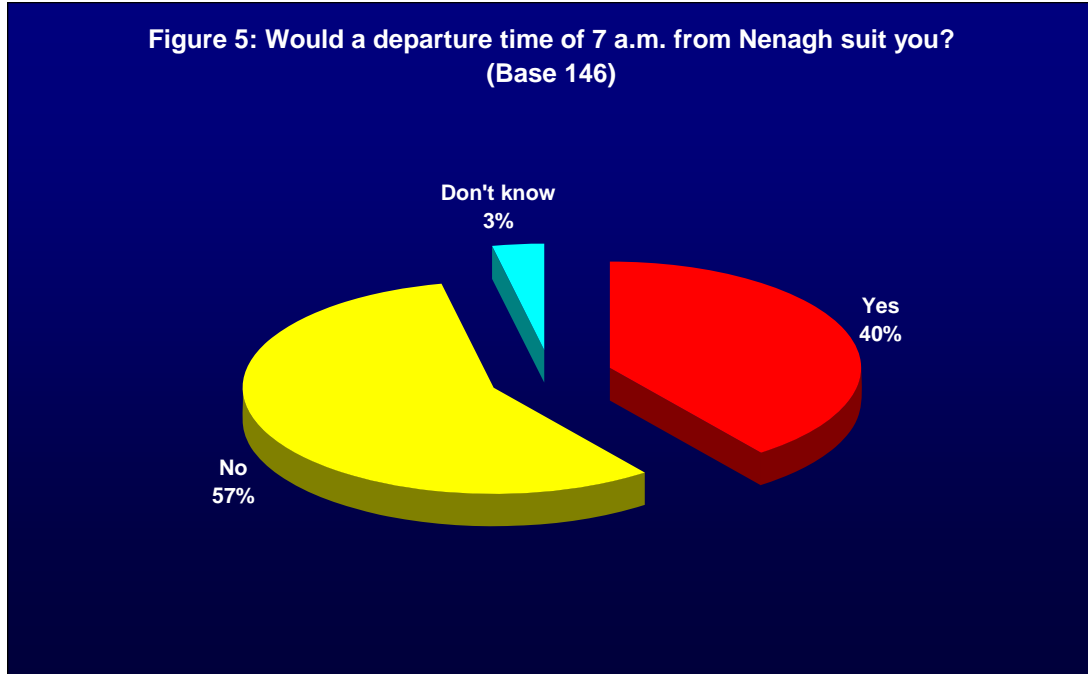


Figure 5 shows that, for the majority of likely users, a 7 a.m. departure time would be unsuitable. All 146 likely users were asked if any other times would be more suitable.

Table 8 shows the suggestions made.

### Table 8: Are there any other times that would be more suitable?

	No. of respondents	% of respondents
Base	146	100%
No reply	24	16%
Before 6.30	6	4%
6.45	10	7%
7	12	8%
7.15	6	4%
7.30	16	11%
7.45	19	13%
8.00	33	23%
8.15	8	5%
8.30	7	5%
8.45	1	1%
9.00	1	1%
After 9	3	2%

Table 8 shows that between 7.30 and 8 would be the most popular time, but no single time was preferred by all.

## Do the proposed return times suit?

All of the likely users were asked if the return times of 4.30 and 6.30 would be suitable. Figure 6 shows the pattern of responses to this question.

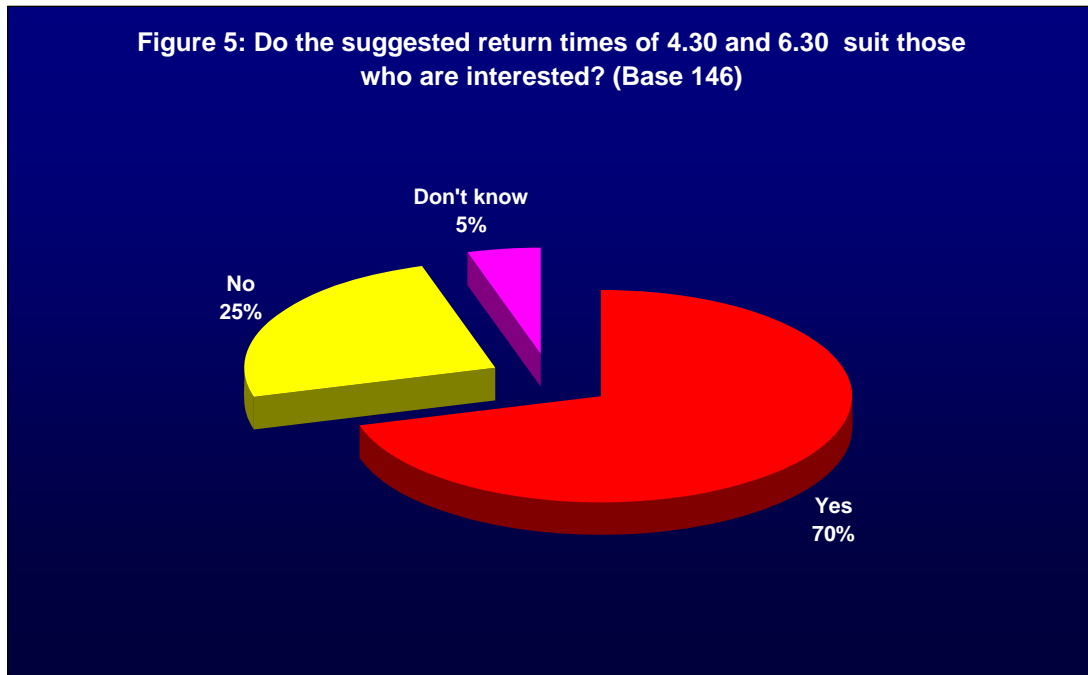


Figure 6 shows that the two afternoon/evening return times suit most people. However, a quarter of the likely users indicated that these return times would not suit them. All 146 likely users were asked if there were any other return times that would be more suitable. Table 9 shows the responses.

**Table 9: Are there any other return times that would be more suitable?**

	No. of respondents	% of respondents
Base	146	100%
No reply	43	29%
Before 4.15	4	3%
4.15	2	1%
4.30	6	4%
4.45	7	5%
5.00	11	8%
5.15	8	5%
5.30	16	11%
5.45	10	7%
6.00	8	5%
6.15	14	10%
6.30	6	4%
After 6.30	11	8%

Table 9 shows that a range of other return times was suggested, but no single time was strongly preferred by most people.

## Key factors that would influence use of the service

All 265 commuters were asked what would be the key factors that would influence whether they would use the service or not. Table 10 shows the main factors mentioned.

**Table 10: Key factors influencing use of the service**

	No. of respondents	% of respondents
Base	265	100%
Convenience	111	42%
Price	52	20%
Departure time	52	20%
Onward distance to my destination	45	17%
Arrival time	37	14%
Availability of linking buses	30	11%
Reliability	15	6%
Parking at station	4	2%

### Other factors mentioned

- Also would be better for the environment
- Breakfast. Tea coffee
- Castleconnell to Annacotty and on to Castletroy bus
- Catering service
- Closeness of station to work
- Customer awareness & timing
- Daughter has to go to school
- Depends on working overtime
- Don't leave for work until nine so seven is much too early
- Efficiency
- Efficiency
- Efficiency
- Environmental impact
- Evening trains
- Family ticket
- Frequency of service
- Frequency of service
- Frequency of train. In September daughter is starting school and would avail of service
- Going to university so station is too far
- Have to carry work tools and get to specific sites, so I need my car
- If based in the office for the day
- If it goes to UL
- If there was a station near UL then I would definitely use it
- In college so leaves later and also would have to make way from station back to UL
- Light train lines to all suburbs
- Linking buses into Nenagh for the train
- More frequency of trains up and down
- Nothing. I need my car for work
- Quality
- Regularity. Availability
- Seating
- Safety of car in car park
- Saturdays
- Scheduling

- Secure free parking in Nenagh station
- Security around Limerick station
- Time leaving as children have to be dropped to child minder
- Time of journey
- Times
- Too far from Nenagh
- Traffic
- Traffic
- Working in Castletroy and have to drop baby to a crèche, not practical
- Working in Raheen so station is too far away. Would take longer than it takes to drive
- Would use because of road blocks or bad traffic

Table 10 shows that the key factors that would affect whether people would use the train service are convenience, price, departure time, onward distance to destination, arrival time, availability of linking buses and reliability.

A number of people working on the National Technological Park emphasised that they would only use the service if they could get off the train in Castleconnell and get a bus to the National Technological park or to the University from there. There are over 3,000 people working on the National Technological Park at present and there are 9,500 students studying at the University of Limerick. The NTP represents a substantial area of economic activity on that side of Limerick. While no information is available on how many people travel to the NTP and the University each day from the Nenagh direction, it is likely to be a significant number. This may represent additional potential for a rail service from Nenagh/Birdhill if a bus service ran from Castleconnell station.

## Importance of an integrated ticket service

All of the commuters interviewed were asked how important it would be to have an integrated ticketing service for trains and buses. Figure 6 shows the pattern of responses.

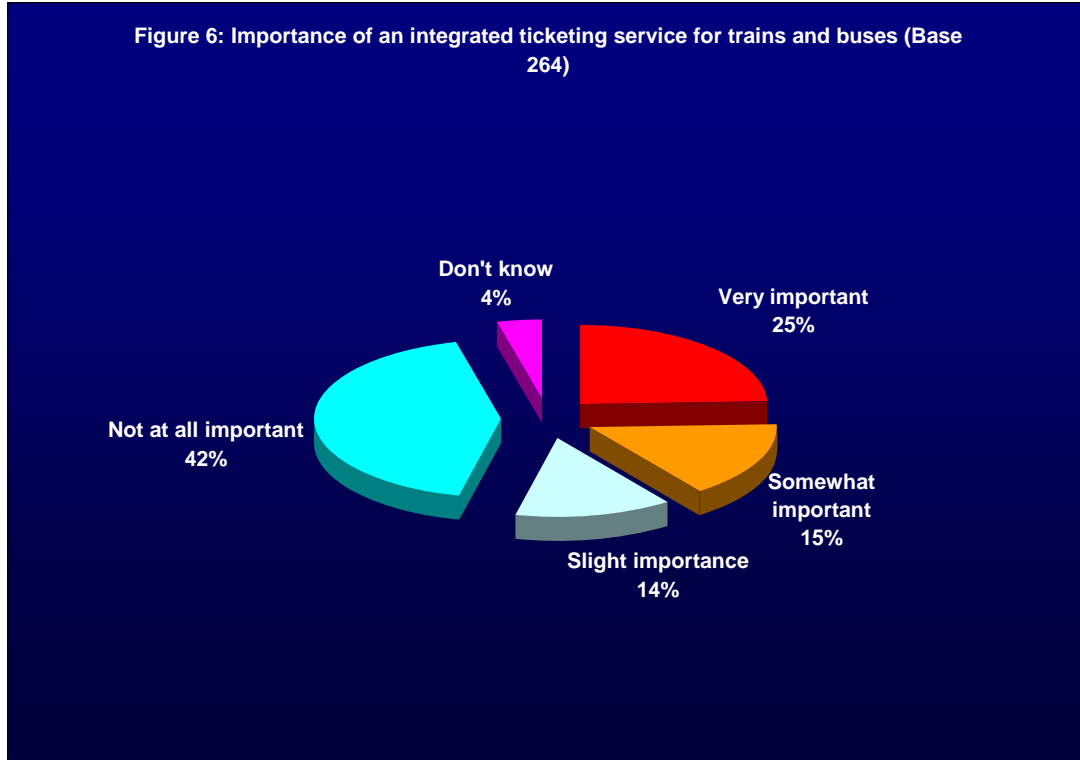


Figure 6 shows that a total of 40% of commuters considered an integrated ticketing service to be important. 25% considered it very important.

## Do people see the train as a more environmentally friendly option?

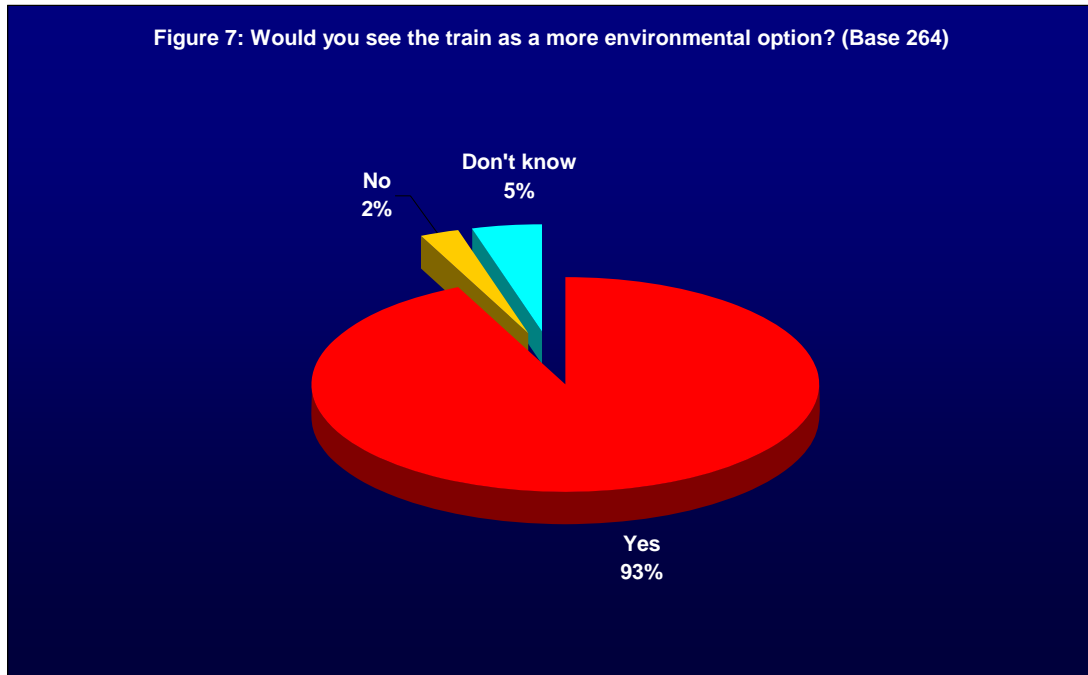


Figure 7 shows that 93% of the commuters surveyed said they would see the train as a more environmentally friendly option.

## Would people use the rail link for shopping in Limerick?

All of the commuters interviewed were asked: "Bearing in mind the proposed 7 a.m. departure time from Nenagh, would anyone in your household use the service to shop in Limerick?" Figure 8 shows the pattern of responses to this question.

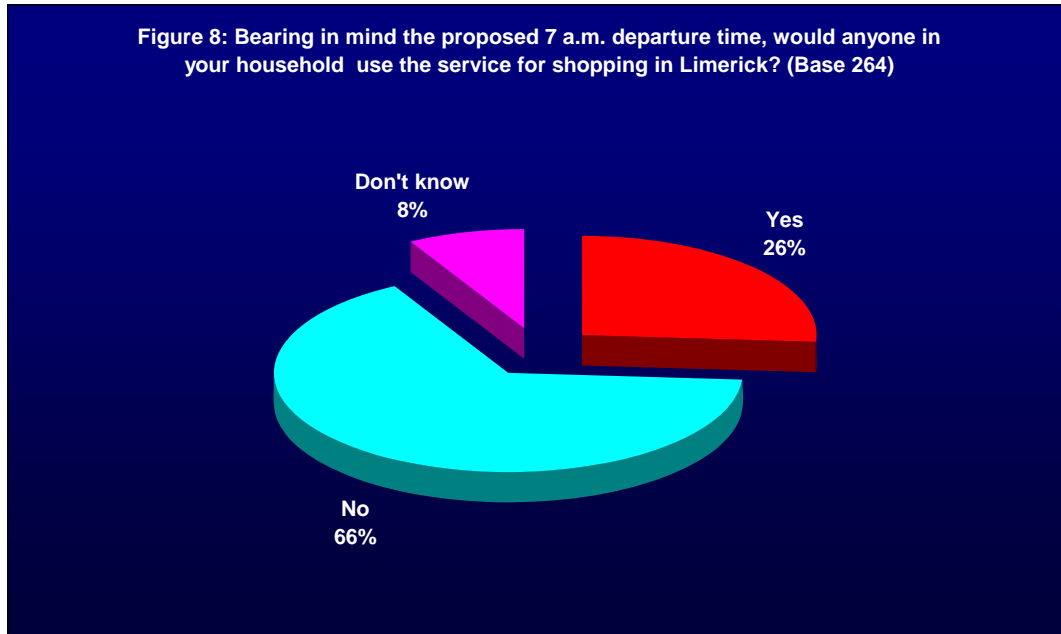


Figure 8 shows that approximately a quarter of commuters said that someone in their household would use the service for shopping in Limerick.

## **Population growth in the survey area**

An investigation into the numbers of new houses built in Nenagh Urban and in the rural areas covered by the survey since 2002 revealed the following:

- 1,676 new houses have been built in Nenagh Urban (Source: Nenagh Town Council)
- 1,534 new houses have been built in the rural survey areas (Source: Tipperary North Riding County Council).

Therefore, a total of 3,210 new houses have been built in the survey area since 2002. This represents a 37% increase in the number of households over the estimated 8,525 in the area at the time of the last Census of Population. This is a dramatic level of population growth in three years.

Allowing for this increase, the estimated number of households in the survey area in 2005 is 11,735, amounting to almost 40,000 people.

## Estimated usage levels of the proposed service

Table 11 contains an analysis of likely usage levels of the proposed service based on the following information from the survey of 2,222 households:

1. Number of households in the survey area
2. Percentage of households that have people commuting to Limerick
3. Percentage of those households that are very likely to use the service

**Table 11: Projected usage levels of commuter rail service**

A. No. of households in survey area*	11,735
B. Percentage of households that have commuters	13.7%
C. % of commuters that are very likely to use rail service	29%
D. Likely number of users (A x B x C)	466

\*Based on 2002 Census figures and updated for new houses built since then.

While the average number of commuters per household is 1.35 persons, it could be argued that households with more than one commuter are less likely to use the train, because of the potential savings on petrol and the additional flexibility involved in travelling by car. Therefore, it has been assumed that only one person per household would travel by train.

In practice, because of different start time requirements and other factors, the actual number of users may fall short of the figures shown above. The number of commuters who would be prepared to take the train at any given departure time is less than the total number who are interested. Those who would use the service at 7 a.m. might not be prepared to use it at 7.30 and vice versa. Assuming the service departed Nenagh station some time between 7.45 and 8 a.m. - based on Table 8 this time would suit some 36% of the people who said they would be very likely to use the train. Applying a figure of 36% to the likely number of users shown in Table 11 means that 168 people would use the service at that departure time. Indeed, this may be a conservative figure. Some households with more than one commuter may use the service and other people may also use it for shopping. Another consideration is that once a service like this is up and running, it can generate its own momentum when people become accustomed to it.

It must be emphasised that a very conservative approach has been taken to preparing the above estimates. Only commuters who said they would be very likely to use the service have been included in the above analysis. Those who said they would be somewhat likely to use it have been omitted.

An analysis of the average journey duration for drivers from Nenagh, Birdhill and Castleconnell to their places of work showed the following:

- The average commuter journey duration for people living in Nenagh Urban was 44 minutes
- The average commuter journey duration for those living in Birdhill was 32 minutes
- The average commuter journey duration for those living in Castleconnell was 19 minutes.

Journey durations for commuters travelling by car are increasing every year, due to the growing numbers of cars on the roads. This trend is likely to continue and road

journey times are likely to lengthen in the next few years. In this context, the duration of the train journey from Nenagh to Limerick may begin to look quite competitive and might even be superior to road journeys in years to come. It can safely be assumed that future housing and population growth in the Nenagh area is likely to add to:

- The number of people commuting to work in Limerick
- Traffic congestion
- Road journey duration; and
- The demand for a rail commuter service.

## **Conclusion**

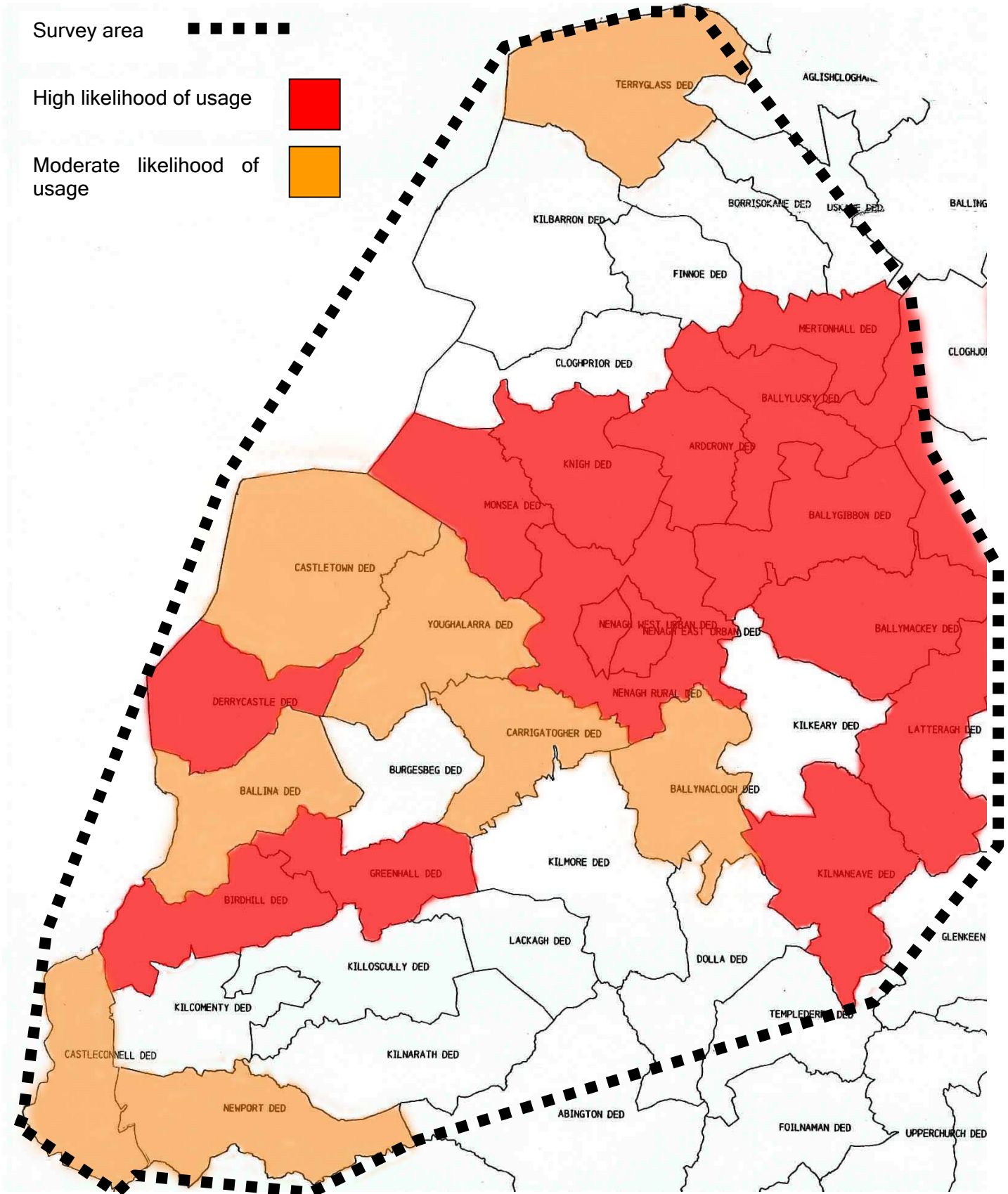
The actual number of people who use the service in practice will be influenced by:

- The reliability of the service
- The price charged
- Availability of buses at Limerick Station
- Availability of buses at Castleconnell Station
- Availability of secure car parking at Nenagh station
- The exact start time from Nenagh station. This could largely determine who uses the service and who does not. There are two main groups of people commuting to Limerick: those working in factories and those working in offices. Factory workers start at 8 or 8.30 in the morning, whereas office workers start at 9 or 9.30. It is difficult to meet the needs of both groups with a single start time from Nenagh. However, it seems that a start time of around 7.45 might be the best compromise.

Overall, the prospect of people using the service looks very positive. Whatever analysis is used in assessing the viability of the service, based on the responses of the people surveyed, the number of commuters who would use the service is likely to be quite significant.

A map of the most likely usage areas is shown in Appendix 1.

# Appendix 1: Map of likely usage, by area



## Appendix 2: Commuters' current morning start times by area

Area	Base	Before 5.30	6.15	6.30	6.45	7.00	7.15	7.30	7.45	8.00	8.15	8.30	8.45	9.00	After 9
Ardcrony	6		17%		17%		17%		17%	33%					
Ballina	23				4%				17%	22%		17%	4%	22%	13%
Ballygibbon	4				50%	25%			25%						
Ballylusky	1					100%									
Ballymackey	3									67%		33%			
Ballynaclogh	7					14%		14%	29%	14%	14%				14%
Birdhill	9							11%		22%	33%		11%	22%	
Burgesbeg	4					25%	50%		25%						
Carrigatogher	8				13%		13%	13%	38%		25%				
Castleconnell	40					10%	3%	35%	5%	20%	5%	13%	3%	8%	
Castletown	1						100%								
CloghJordan	1			100%											
Cloghprior	2							50%			50%				
Derrycastle	4			25%					25%	25%	25%				
Dolla	2					50%				50%					
Finnoe	1										100%				
Greenhall	3			33%							33%	33%			
Kilcomenty	10						10%	10%	10%		40%	20%		10%	
Kilkeary	4				50%	50%									
Killoscully	4						25%			25%				50%	
Kilmore	3						33%	33%							33%
Kilnaneave	8					13%		50%		25%		13%			
Kilnarath	5									20%	40%		20%	20%	
Knigh	6		17%						33%	33%	17%				
Latteragh	4					25%		25%	25%	25%					
Mertonhall	2				50%								50%		
Monsea	6								33%	50%				17%	
Nenagh Urban	38			3%	3%	3%	16%	5%	32%	11%	11%	5%	3%		11%
Nenagh Rural	18			6%		11%	6%	11%	28%	6%		17%	6%	11%	
Newport	26	4%			8%	4%	12%	12%		19%	15%	12%	4%	4%	8%
Terryglass	4					25%			50%	25%					
Youghalarra	8					25%	25%			13%		13%			25%

