

Understanding attitudes and perceptions of Cycling & Walking

NZTA

TRA

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Understanding overall travel behaviour

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Attitudes & Perceptions of cycling

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Unlocking the opportunity in walking

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Bringing it all together

The Background

The increase in New Zealand's population will put significant pressure on road capacity over the next 30 years.

A key priority for NZTA is to invest in and promote cycling and walking as a transport mode of choice. Increasing the number of people using these more active modes will help relieve pressure on key parts of the roading network, improve safety and ultimately improve the wellbeing of New Zealanders.

In order to make the right investment decisions and promote cycling and walking, NZTA are focused on measuring and understanding current travel behaviour, attitudes, perceptions and motivations to guide activity.

The overall insight objectives

The specific insight objectives are to:

1. Measure current behaviour of New Zealanders (frequency, journey, purpose) and compare against benchmark 2016 results.
2. Understand attitudes, drivers, barriers and motivations for cycling and walking with a regional view.
3. Determine the future adoption likelihood of cycling and walking.
4. Measure visibility, satisfaction and perceptions towards relevant cycling and walking infrastructure and NZTA promotion activity.

Bring it all together to form a clear understanding of cycling and walking and the opportunity spaces for influencing future behaviour.

What did we do?

To understand behaviours, attitudes and perceptions of different modes of travel

A 15 minute online survey of n=2,115 New Zealanders.

With a focus on key regions of:

Auckland n=507

Wellington n=500

Christchurch n=507

Hamilton n=201

Tauranga n=200

Dunedin n=200

Margin of error at a 95% confidence interval on sample of:

N=2,115 +/-2.19%

N~500 is +/-4.38%

N~200 is +/-6.93%

Fieldwork ran from May 21st – June 24th 2018.

Invitations were sent on a daily basis over the fieldwork period, to ensure there was no bias due to weather conditions.

Fieldwork was completed via an online survey using Research Now's panel.

Respondents on the panel were invited to participate in a survey, they were not told the subject of the survey prior to starting as per industry best practice, to avoid any self-selection bias.

Interlocking quotas were utilised for age and gender within each region, to ensure data is representative according to Stats NZ 2013 census.

Post fieldwork, the data was weighted according to age/gender.

Comparisons to 2016

Due to methodological differences between 2016 and 2018, whereby 2016 was conducted using CATI (telephone interviews) and 2018 was conducted online, any changes over time must be viewed as indicative shifts only.

The Urban Cycleway Fund is a large investment in infrastructure to encourage active modes across New Zealand

In August 2014, the government announced the \$100 million Urban Cycleways Fund (UCF).

This led to the \$333 million Urban Cycleways Programme (UCP) being implemented from late 2014 to June 2018. The programme provides increased investment to accelerate the delivery of cycling networks in our main urban centres, and incentivises partners to increase their investment in cycling and walking projects.

To date, around half of the Urban Cycleway Funds have been completed, with infrastructure underway in Auckland and Christchurch in particular, along with Hamilton and Dunedin.



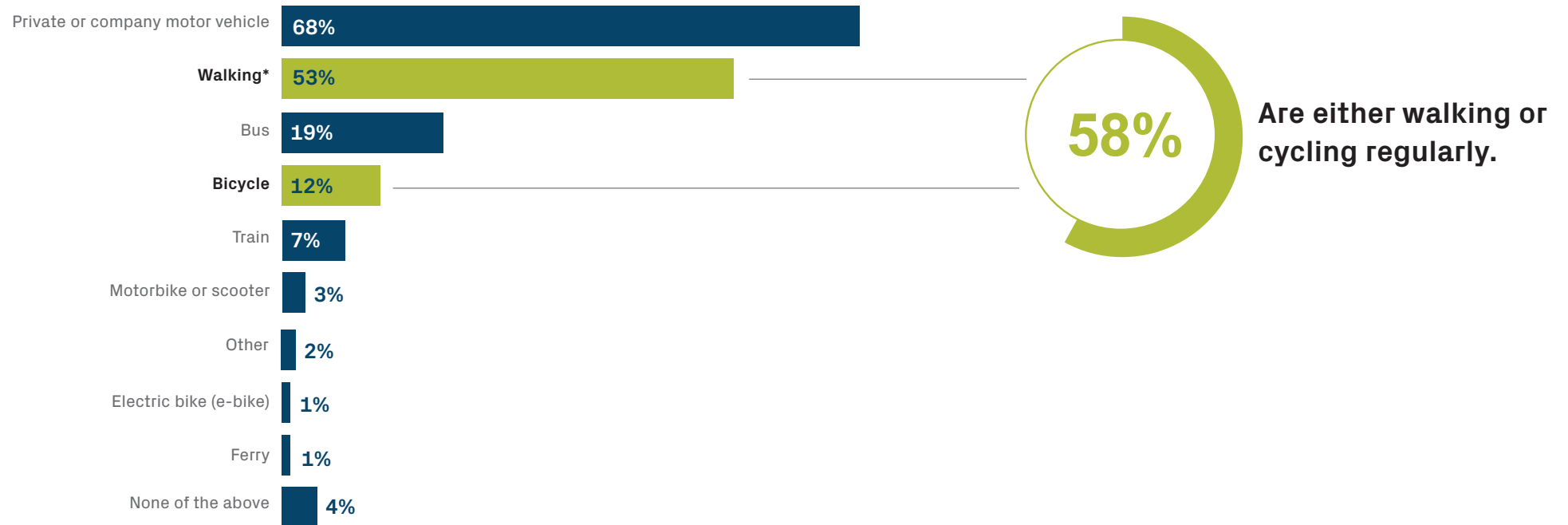


Understanding
overall travel
behaviour

TRA

The car is the dominant mode of transportation, but active modes play a significant role in travel choices

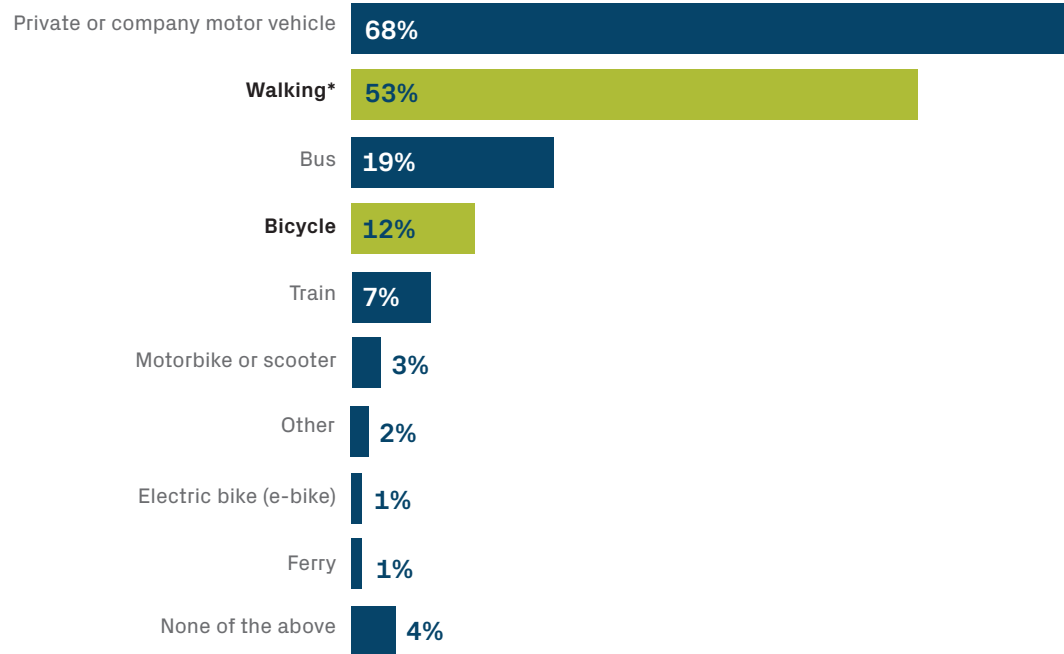
REGULAR MODES OF TRANSPORTATION



Q23b. And which of the following do you regularly use, e.g. once a week or more often? This can be for any reason, including work, sport or recreation.
 Base: Total sample, n=2115
 *Walking 100m or crossing a road

Transportation choices differ by region; active modes are more established in the south

REGULAR MODES OF TRANSPORTATION – BY REGION

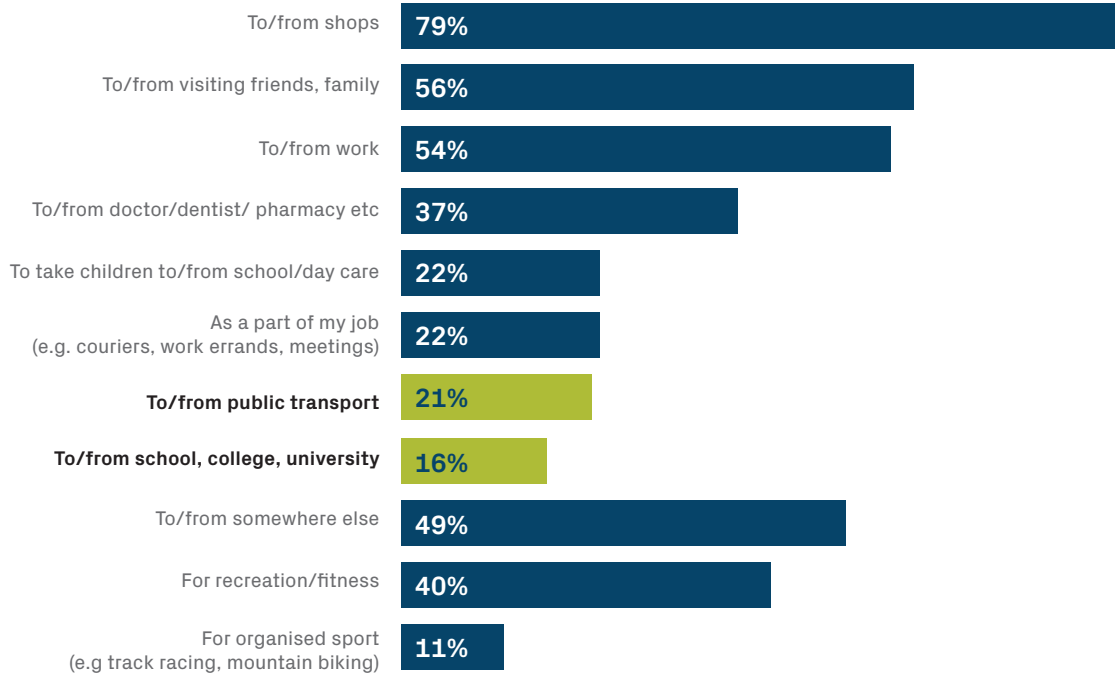


	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
Private or company motor vehicle	67%	72%	70%	60% ▼	75% ▲	69%
Walking*	46% ▼	54%	49%	57%	53%	69% ▲
Bus	26% ▲	13%	9% ▼	26% ▲	14% ▼	12% ▼
Bicycle	10%	12%	14%	8% ▼	17% ▲	9%
Train	12% ▲	-	-	18% ▲	-	-
Motorbike or scooter	3%	4%	3%	3%	3%	0%
Other	1%	2%	2%	2%	2%	3%
Electric bike (e-bike)	1%	1%	1%	2%	1%	1%
Ferry	3% ▲	-	-	-	-	-
None of the above	4%	6%	5%	4%	4%	3%

Q23b. And which of the following do you regularly use, e.g. once a week or more often? This can be for any reason, including work, sport or recreation
 Base: Total sample, n=2115. Auckland, n=507, Hamilton, n=201, Tauranga, n=200, Wellington, n=500, Christchurch, n=507, Dunedin, n=200.
 *Walking 100m or crossing the road

NZers travel for a myriad of reasons; there are regional differences for travel to and from public transport or study

TRIPS TRAVELLED IN THE LAST WEEK – BY REGION

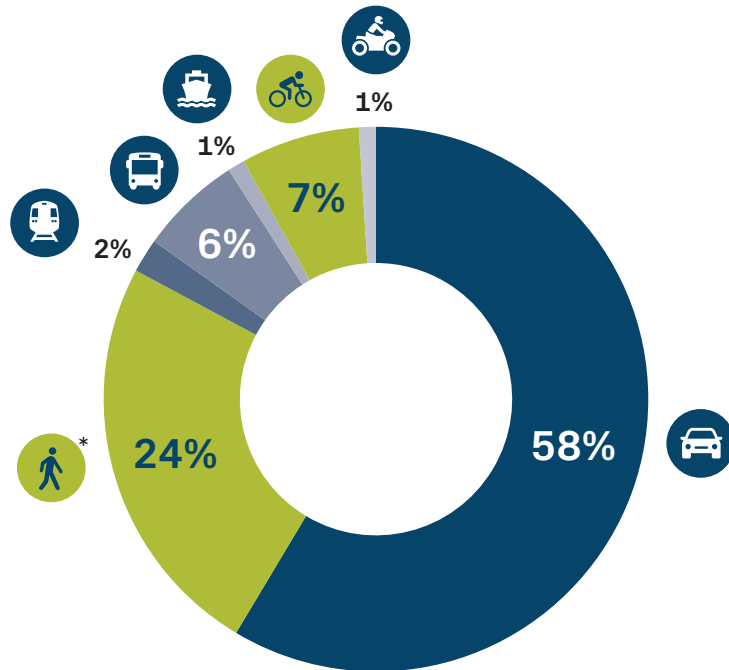


	Auckland	Hamilton	Tauranga	Wellington	Christchurch	Dunedin
To/from shops	74% ▼	82%	80%	80%	83%	81%
To/from visiting friends, family	54%	58%	58%	56%	58%	51%
To/from work	53%	56%	51%	58%	53%	49%
To/from doctor/dentist/ pharmacy etc	32%	40%	40%	36%	40%	36%
To take children to/from school/day care	21%	31% ▲	22%	21%	21%	20%
As a part of my job (e.g. couriers, work errands, meetings)	20%	25%	22%	22%	21%	24%
To/from public transport	29% ▲	12% ▼	8% ▼	37% ▲	12% ▼	9% ▼
To/from school, college, university	14%	13%	12%	20% ▲	14%	25% ▲
To/from somewhere else	42% ▼	52%	52%	50%	50%	53%
For recreation/fitness	40%	35%	42%	41%	38%	48%
For organised sport (e.g track racing, mountain biking)	10%	12%	13%	11%	10%	15%

Q25. Thinking about all of the travel you have done in the past week. What types of trips have you travelled for in the past week?
 Base: Total sample, n=2115. Auckland, n=507, Hamilton, n=201, Tauranga, n=200, Wellington, n=500, Christchurch, n=507, Dunedin, n=200.

Looking across all travel made over the course of a week, walking accounts for more than 1 in 5 trips

TRIPS TRAVELLED IN THE LAST WEEK – SHARE OF TOTAL TRIPS BY MODE



Overall, active modes of transportation account for nearly a third of all trips travelled in a given week.

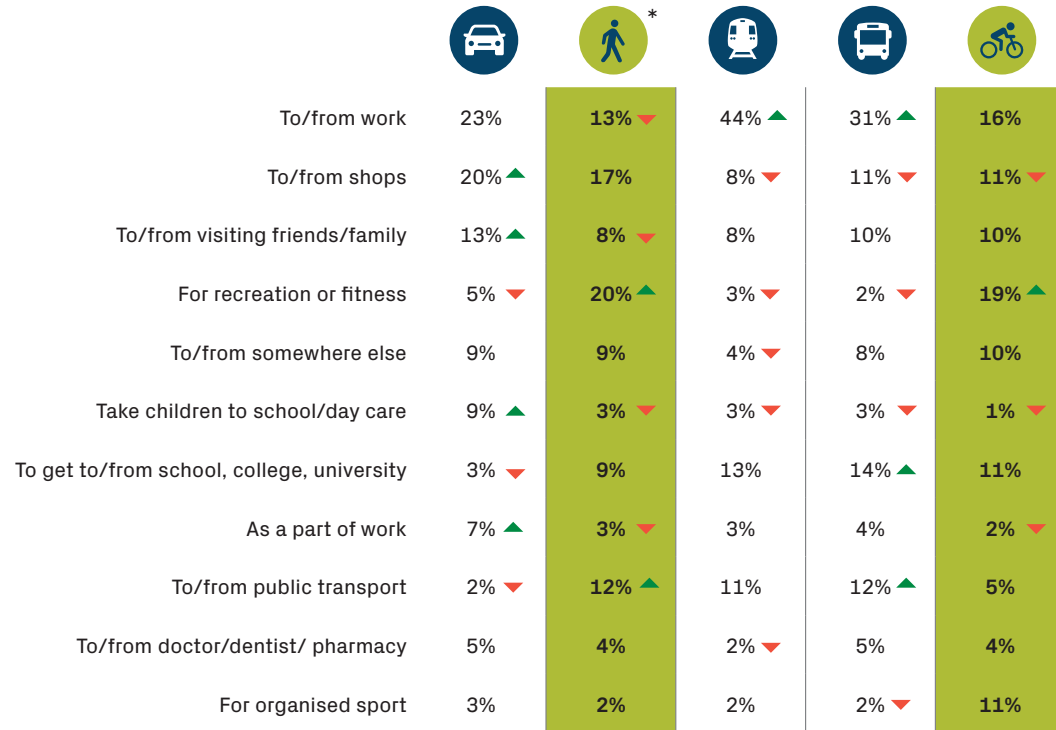
Kiwis overall are reliant on their cars, with car taking up the greatest share of trips across the last week.

The challenge is going to be in cutting through and disrupting habitual behaviour in order to encourage the usage of both active modes of travel and public transport as alternative methods of travel.

Q26. Thinking about the past week, how many times did you use each type of transport when travelling for these occasions?
 Base: Total trips travelled in last week across modes. Total sample, n=2115.
 *walking 100m or crossing the road

Each mode is used for various reasons; but different trips feature more strongly for each mode

TRIPS TRAVELLED IN THE LAST WEEK – SHARE OF TOTAL TRIPS BY MODE, BY REASON



Recreation and fitness are a key reason for travelling by either foot or bicycle.

Beyond this, the majority of **walking** is for the purpose of getting:

- To/from the shops
- To/from public transport or,
- To/from work

Cycling supports travel:

- To/from work
- To/from the shops
- To/from study
- With organised sport also accounting for around 1 in 10 trips on a bike.

Q26. Thinking about the past week, how many times did you use each type of transport when travelling for these occasions?
 Base: Total trips travelled in last week across modes. Total sample, n=2115.
 *walking 100m or crossing the road

Active modes are part of an overall travel repertoire

For many New Zealanders, the motor vehicle is the dominant mode of transportation.

However, people are not unimodal when it comes to travelling from A to B. Public transport and active modes are also used for travel; albeit to varying degrees.

People move about their cities and communities for a variety of reasons in any given week. Different factors come into play to determine the mode of transportation for each of these trips.

By further understanding what influences people and their current travel choices, we can identify where the opportunity is for growth in walking and cycling.

IMPLICATION



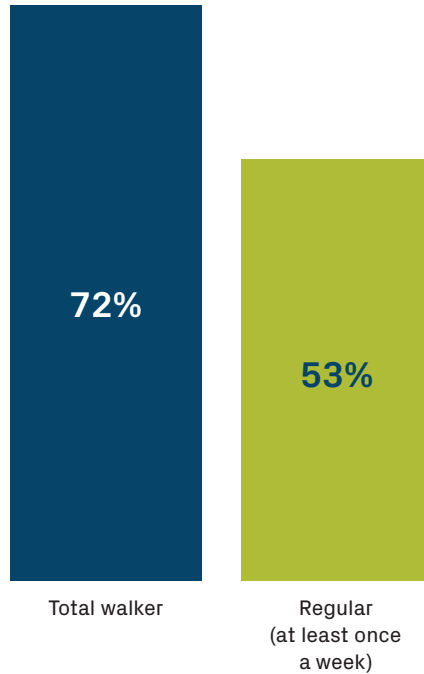
TRA

While nearly everyone is walking to some extent, there is opportunity to encourage specific walking trips

WALKED* IN THE LAST 12 MONTHS



2018 was the first time we asked about walking behaviour.



For those who are physically able to, walking is something that is done on a regular basis; **53% walk at least once a week.**

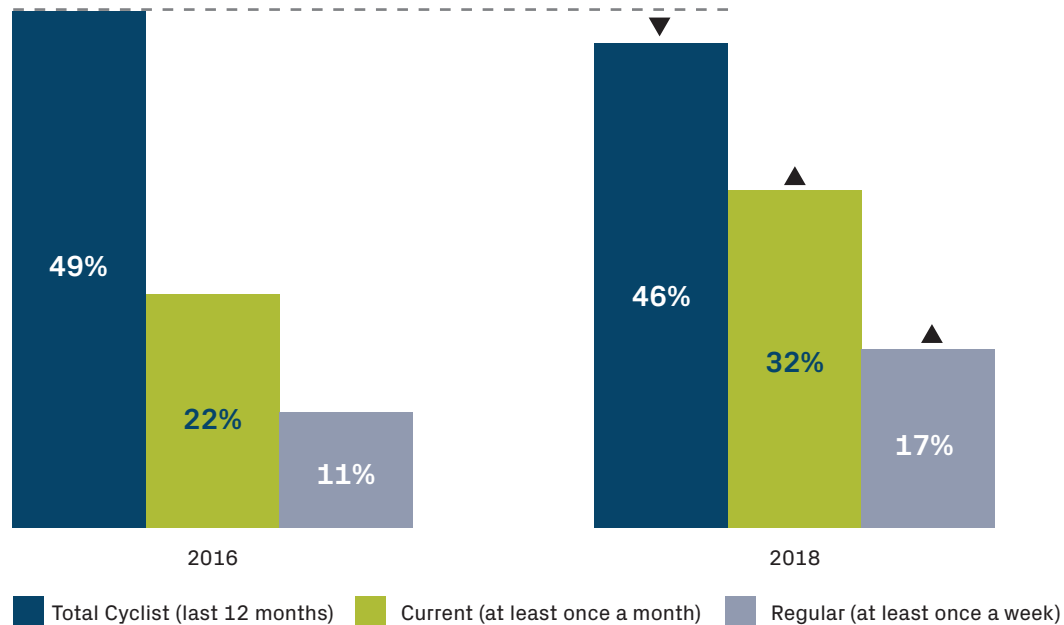
The challenge is not to get people into walking in general, but to encourage walking as a way of travelling between A and B.

It's about changing the way in which people engage with walking, and increasing the frequency by which walking is chosen as a way of travel for those urban trips.

Q23a. Which of the following have you used in the past 12 months?
 Q23b. And which of the following do you regularly use, e.g. once a week or more often? This can be for any reason, including work, sport or recreation
 Base: Total sample, n=2115. *walk 100m or cross the road

Overall, the level of cycling remains stable vs 2016; however there has been an indicative increase in the frequency of cycling

CYCLED IN THE LAST 12 MONTHS



46% have cycled within the past 12 months – a level that is fairly consistent when compared to 2016.

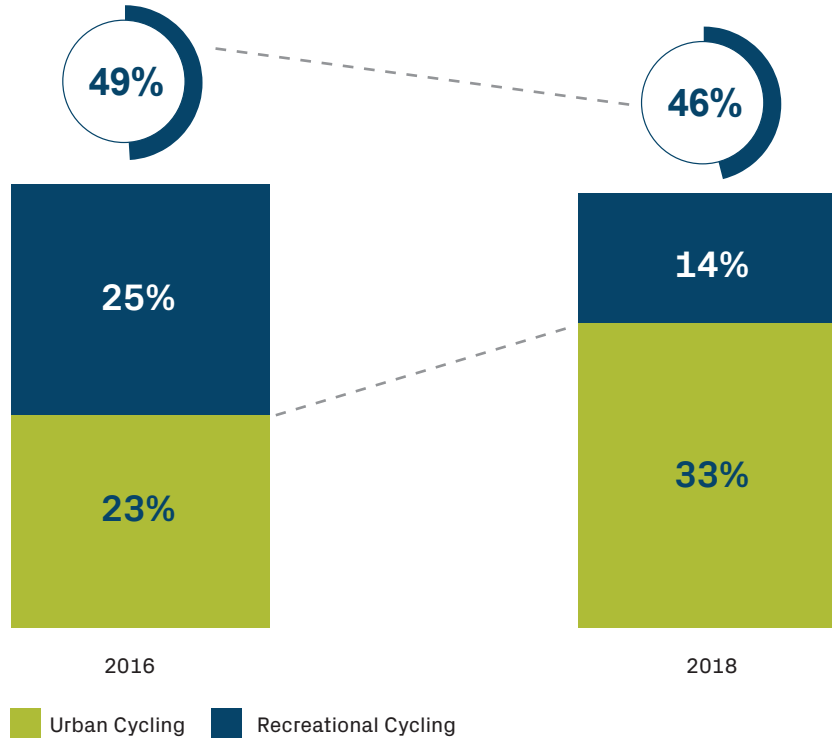
Although overall participation levels have not seen growth, there have been positive movements in the frequency with which people cycle – those who are getting on a bike, are doing so more often.

- ▶ At a regional level, Auckland falls behind the other main centres, with just 40% having cycled within the last year.

2018 Q4. In the last 12 months have you used a bicycle to...?
 2018 Q6. How often do you currently ride a bicycle?
 Base: Total sample: 2016, n=414, 2018, n=2,115
 Due to methodological differences CATI in 2016 vs online in 2018, changes are to be viewed as indicative only.

Urban riders now make up a greater proportion of those who have cycled in the last 12 months

CYCLED IN THE LAST 12 MONTHS



Of those cycling, there has been a shift in the type of cycling behaviours. There has been a degree of conversion amongst recreational riders to urban cyclists. As a result, looking across our cycling segments, we see growth in our Urban Riders when compared to 2016.

2018 Q4. In the last 12 months have you used a bicycle to...?
2018 Q5. When you use your bike for recreational purposes, do you cycle...?
2018 Q6. How often do you currently ride a bicycle?
Base: Total sample: 2016, n=414, 2018, n=2,115

Due to methodological differences CATI in 2016 vs online in 2018, changes are to be viewed as indicative only.

There are two separate challenges for walking and cycling

The level of participation in walking and cycling is very different.

Travelling by foot is something that is done regularly by the majority, with 53% walking at least once a week. When it comes to travelling on two wheels however, this is something that only 12% of people do regularly. Positively, regular cycling has seen significant growth in the past 2 years.

There are two separate challenges to increase the amount of travel done by either walking or cycling:

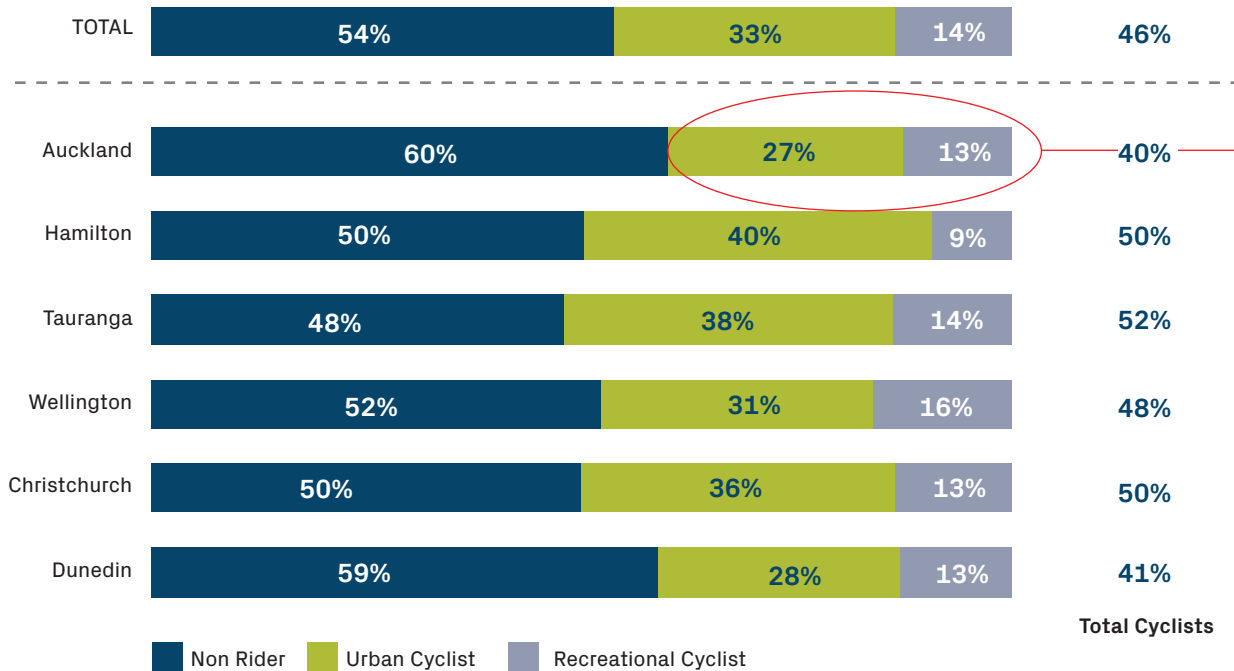
- For walking, it is less about encouraging new walkers, but increasing the frequency with which people choose to walk for certain trips.
- For cycling, there is still a job to do to encourage new riders to take up cycling, and to extend beyond fitness and recreation to using the bike in more urban settings, as a means of getting from A to B.

IMPLICATION



Auckland is yet to achieve the same levels of cycling as the other main centres

CYCLED IN THE LAST 12 MONTHS – BY REGION



Across the regions, while Auckland has a greater number of cyclists in terms of absolute numbers, it falls behind our other regional centres when taking account the population size.

Urban cycling shows some strength through Hamilton, Tauranga and Christchurch.

2018 Q4. In the last 12 months have you used a bicycle to...?
 2018 Q5. When you use your bike for recreational purposes, do you cycle...?
 2018 Q6. How often do you currently ride a bicycle?
 Base: Total sample, n=2115. Auckland, n=507, Hamilton, n=201, Tauranga, n=200, Wellington, n=500, Christchurch, n=507, Dunedin, n=200

Overall, there have been positive movements in cycling

When compared to 2016, there has not been a significant change in the overall number of people cycling.

There has been a shift in the frequency of cycling, which sees people riding a bike more often than they had previously. As such, there are now more urban cyclists than recreational cyclists – positive movements when looking at cycling in New Zealand overall.

The level of cycling differs at a regional level; Auckland has the lowest level of current cyclists, while urban cycling shows some strength through Hamilton, Tauranga and Christchurch.

We need to further understand what is driving the behaviour change we have seen to date, and better understand what has limited the overall growth in cycling throughout New Zealand.

IMPLICATION



Spotlight on Cycling

2

TRA



Cycling is an accessible activity that sees increasing participation across our communities

PROFILE OF CURRENT CYCLISTS

2016

Current cyclists are more likely to be:

- Male (29%)
Female (17%)
- Higher Income earners (32%, over \$100K)

2018

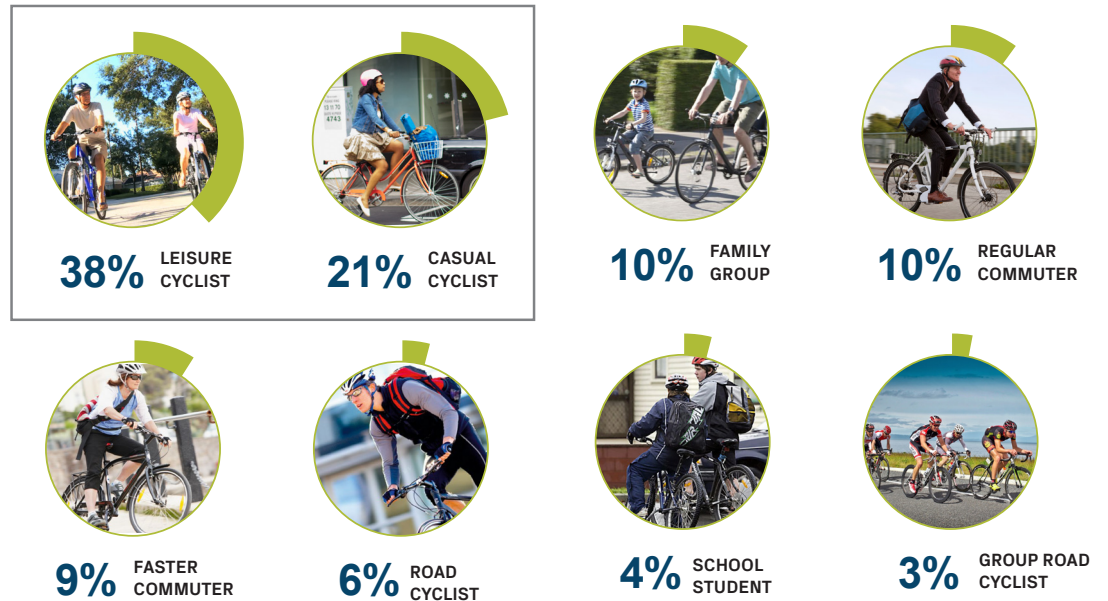
Current cyclists are more likely to be:

- Male (37%), though there has been a growth in Females cycling
- Under 35 (40%)
- Higher Income earners (37%, over \$100K)

The face of **urban cyclists** has also changed since 2016, as although still typically male dominated, there has been a rise in females (20% - 29%)

While regular cyclists are more likely to be younger, or male, there is an increasing normalisation of cycling behaviour.

Cyclists are more likely to identify as:



► Despite a commonly held belief that cyclists are your stereotypical MAMIL, this is becoming less of the norm.

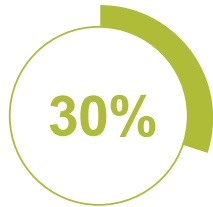
*Q18 Which of the following would best relate to the type of cyclist you are? Cyclists = 970
 2016 Current cyclists, n=98 compared to Total sample, n=414.
 2018 Current cyclists, n=665 compared to Total sample, n=2115.
 Due to methodological differences CATI in 2016 vs online in 2018, changes are to be viewed as indicative only.*



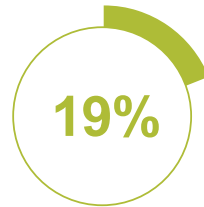
‘Cyclists’ are family members, friends and colleagues; there is an increasing social acceptance of cyclists

NORMALISATION - Total

I have lots of friends and family who cycle.

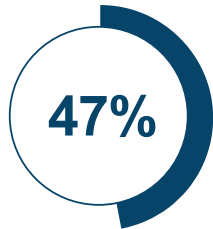


At work, lots of my colleagues cycle to work.

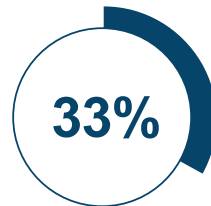


SOCIAL ACCEPTANCE - Cyclists

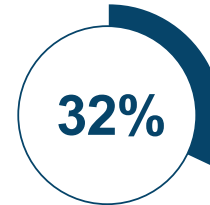
My family encourage and support that I cycle.



I believe that cycling improves my personal image to my peers.



My friends admire and encourage me to cycle.

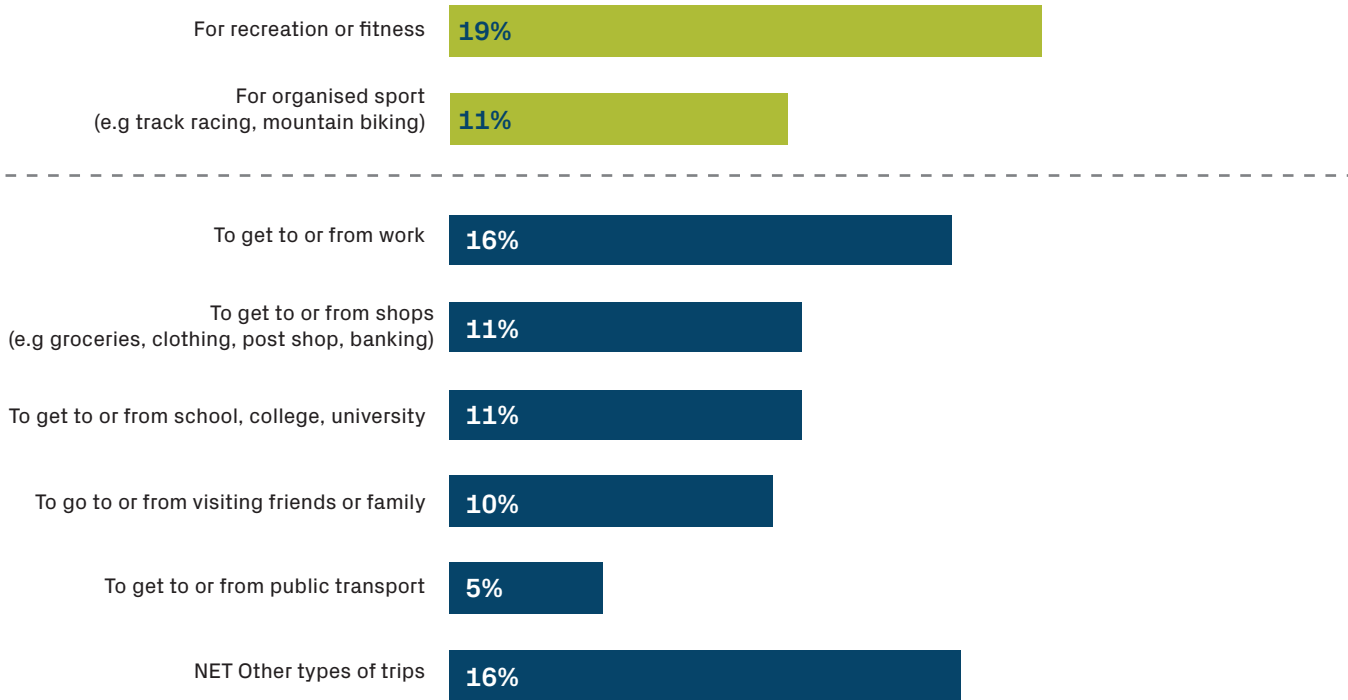


*Q8. Now please tell us how much you agree or disagree with the following statements about cycling.
Base: Total sample, n=2115, Total cyclist, n=970.*



Cycling is being integrated into everyday life and activities

VOLUME OF TRIPS TRAVELLED BY BIKE



Q.26. Thinking about the past week, how many times did you use each type of transport when travelling for these occasions? Base = 2115

Cycling for recreation and organised sport does account for around 4 in 10 trips made by bike.

However, cycling around town as a means from getting from A to B is also a significant contributor to the total number of rides on a bicycle.

As urban cyclists travel by bike as part of their daily commute, or to the local shops, this also increases the visibility of cycling amongst less regular riders and non-riders; all in all, normalising this type of travel behaviour.



Role of normalisation in behaviour change

Existing perceptions of certain types of riders can conjure up some negative ideas that cycling 'isn't for me'. An activity for the hard-core, the brave, the fit.

But this isn't the reality.

Although current riders are still more likely to be younger and/or male, there are a range of riders (male and female, young and old) now taking to the bike.

Social norming is an important aspect influencing behaviour change. As we see more people 'like me' engaging with brands, using services, or doing certain activities, we may be more open to the idea of giving it a go ourselves.

As we see more casual and leisure cyclists taking to the roads this helps to normalise cycling as a valid mode of transportation; encouraging greater social acceptance and empathy when sharing the road.

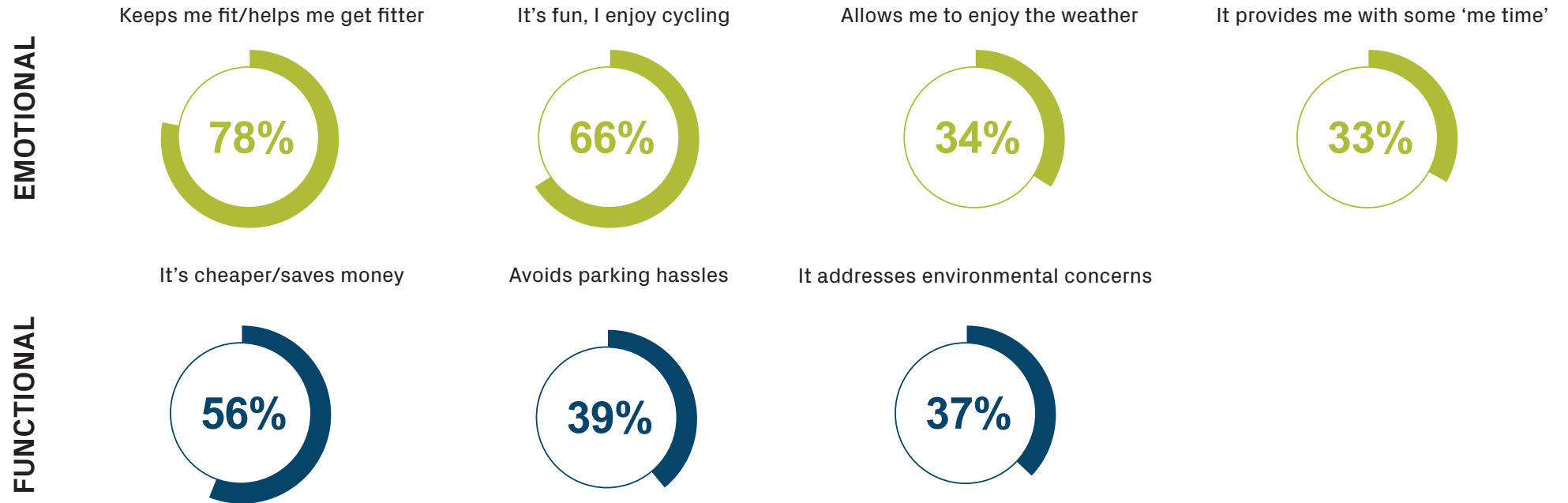
IMPLICATION





Cycling promotes fitness and well-being, it also delivers on functional benefits such as time and money savings

REASONS FOR CYCLING



Q11a. From the list below, what are the key reasons you choose to cycle?
 Base: Total cyclists, n=970

The top reasons for cycling were similar in 2016



But there are various emotional and functional barriers to overcome to encourage greater levels of cycling

BARRIERS TO CYCLING



*Q11b Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling in [pipe:S3a], which of these statements, if any, apply to you?
Base: Physically able to cycle n=1,814.*

The top barriers for cycling were similar in 2016. They are also similar between cyclists & non-cyclists.



This is a consistent picture across New Zealand; although slight regional differences do exist

DRIVERS AND BARRIERS TO CYCLING – BY REGION

AUCKLAND

Less likely to consider enjoyment and money savings as reasons for cycling.
 More likely to see infrastructure and travel time as barriers along with the geography of the area (hills).

TAURANGA

More likely to consider the availability of separated cycle ways as a reason for cycling.
 Weather and hills are less of a barrier to cycling more.

HAMILTON

More likely to consider improved routes as reasons for cycling.

WELLINGTON

Less likely to consider availability of cycle paths or ways as a reason for cycling.
 Hills are more likely to take out the enjoyment and be a barrier to cycling more often.

CHRISTCHURCH

Bike ownership, and the hills are less of a concern in Christchurch.

DUNEDIN

Bike ownership, and the hills are more likely to be considered a barrier to cycling more often.

*Q11a. From the list below, what are the key reasons you choose to cycle?
 Base: Total cyclists, n=970
 Q11b Sometimes people tell us there are things that stop them from cycling as much as they otherwise would. When it comes to cycling in [pipe:S3a], which of these statements, if any, apply to you? Base: Physically able to cycle n=1,814.*



A holistic approach is needed to influence cycling behaviour

Increasing cycling in New Zealand can lead to a number of individual and social benefits; health, economic and environmental.

But to influence people to give the bike a go, or to increase the frequency with which current cyclists ride, will take a multi-faceted approach.

There is an opportunity to encourage urban cycling up-take by promoting the initiatives and programmes in place to address the safety and practical barriers associated with cycling. Cyclists experience a range of emotional and functional benefits, and this can inspire people into giving it a go.

The concerns with safety also extend to current cyclists. By improving cyclist safety, and the overall experience when riding a bike, NZTA has the ability to positively reinforce cycling behaviours and encourage people to ride more often.

IMPLICATION



TRA

A large, stylized white number '3' is centered on a green background. The background is split diagonally from the top-left to the bottom-right, with a yellow-green gradient on the left and a teal gradient on the right. The number '3' is composed of thick, rounded strokes.

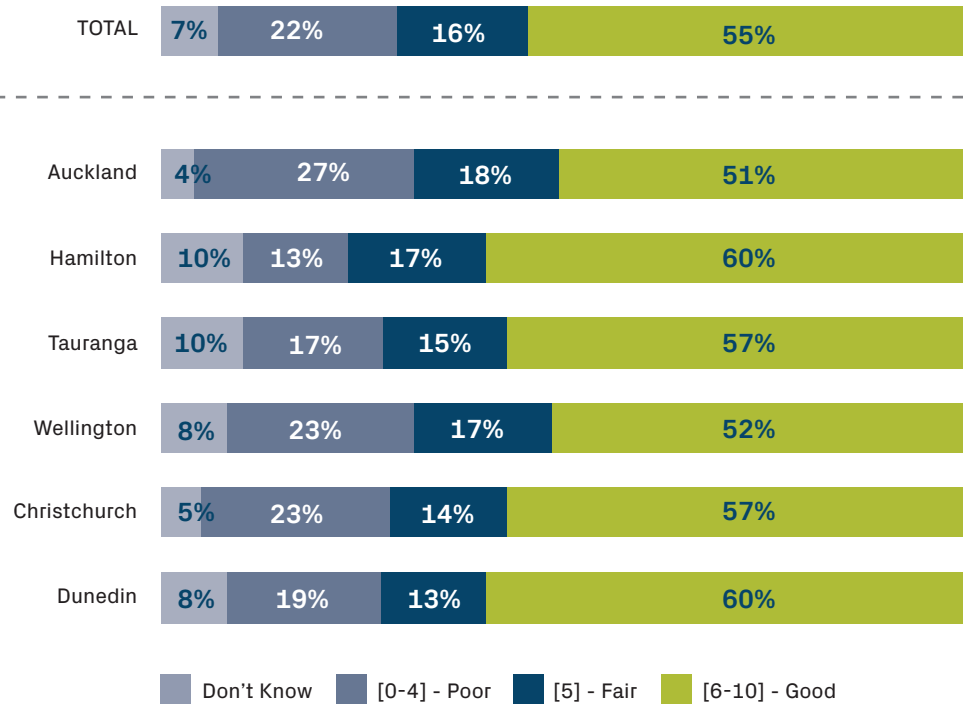
Perceptions
of cycling

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Overall, perceptions of cycling are strong, with more than half viewing it positively

OVERALL STATE OF CYCLING



55% perceive the overall state of cycling in their region to be good; a perception which is even stronger amongst current cyclists (64%).

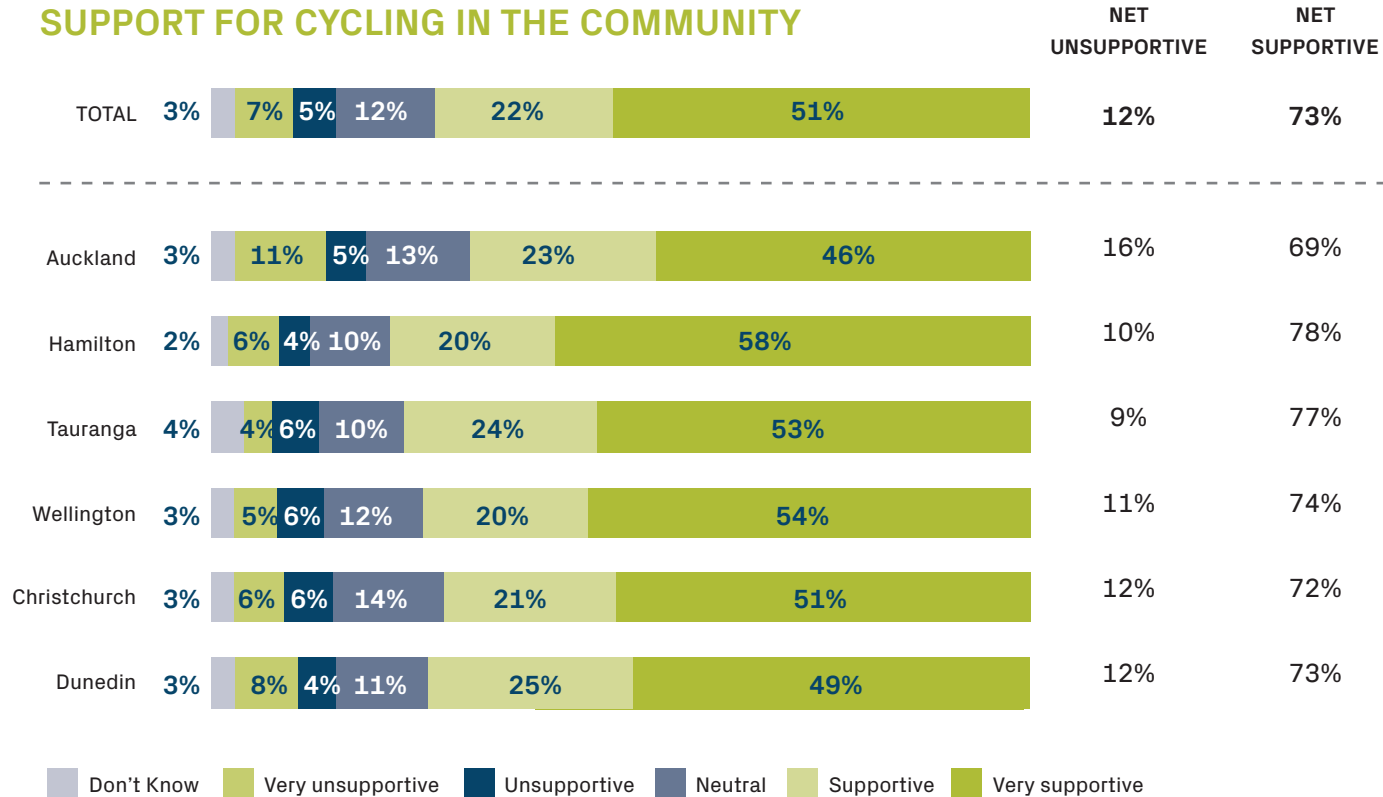
Perceptions of cycling are stronger outside of the main centres, with a more positive response in Hamilton, Tauranga and Dunedin.

O1. Overall, how do you view the current state of cycling in [your region]?
 Base: Total sample, n=2115. Auckland, n=507, Hamilton, n=201, Tauranga, n=200, Wellington, n=500, Christchurch, n=507, Dunedin, n=200.



And most members of the public are supportive of cycling within their community

SUPPORT FOR CYCLING IN THE COMMUNITY



Overall, there is a high level of support for cyclists and cycling in the community (73%). This does not differ by region.

Fostering positive perceptions of cycling is important to encourage growth and increased frequency of cycling, and helping creating safe cycling communities where users can share the road.

Q6c There are varying levels of support in the community for people who choose to cycle for journeys such as travelling to work, going to shops or other activities. To what degree do you support cycling in your community?
 Base: Total sample, n=2115. Auckland, n=507, Hamilton, n=201, Tauranga, n=200, Wellington, n=500, Christchurch, n=507, Dunedin, n=200.



Cycling may not be for everyone, but maintaining support in the wider community is important

SUPPORT FOR CYCLING IS DRIVEN BY:



“Bicycle is environment-friendly and can keep healthy.”

“It is better for the environment than cars and provides good exercise.”



“Good fitness and it helps get cars off the roads.”

“It’s important to encourage healthy lifestyles.”



“Helps people get around. Also good for exercise and fun for families.”

“Good exercise and good environment.”

Q6d. Why do you say that? Base n = 2115

BUT SOME FACTORS CONSTRAIN THAT SUPPORT:



“Good exercise, but roads unsafe.”

“Whilst I am supportive I consider it unsafe to cycle due to unsafe practices of motorists.”



“Cycling lanes are a nuisance.”



“Some cyclists are cocky and ride three abreast when they shouldn’t. Hate them!”



Progress in cycling is not limited to influencing people on their bikes

Although most members of the public look towards cycling in a positive light, there can be some tension when it comes to road sharing, investment, or the impact of infrastructure development.

An 'us versus them' mentality when it comes to riders and drivers, or cyclists and non-cyclists seeks to limit the positive impact cycling could have on the lives of individuals and our communities.

While programmes to encourage cycling will be developed with the 'future rider' in mind, it is also important that they continue to engage with non-cyclists. By engaging with non-cyclists, those who share the roads with our urban and recreational cyclists, we can help encourage acceptance of cycling, and safe road use behaviours.

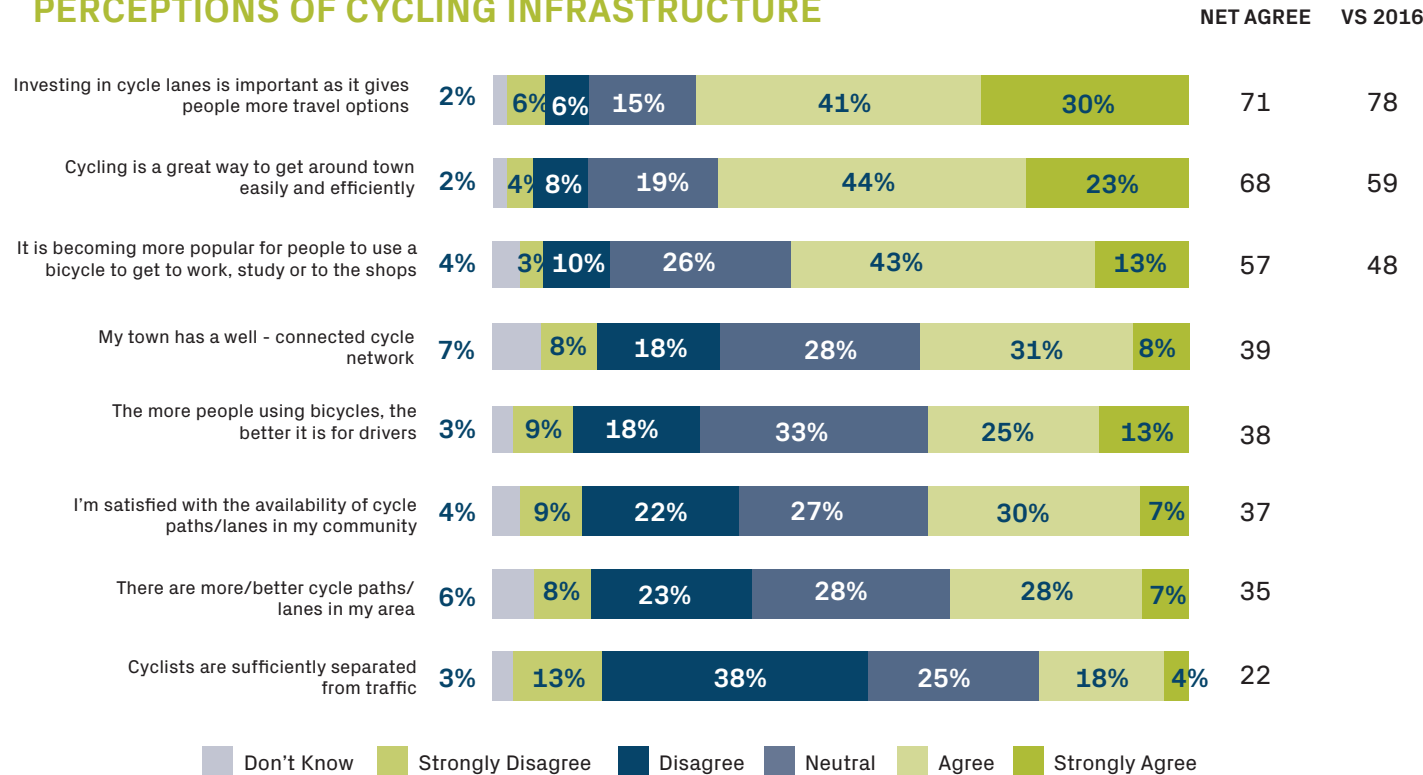
IMPLICATION





Community engagement helps to maintain the support for investment in cycling infrastructure

PERCEPTIONS OF CYCLING INFRASTRUCTURE



“Unlike many places our cycling model and cycle ways seem to be built for the lycra brigade rather than the basket on the front sort of bike.”

“I deal with cyclists most days while working and am not sure our roads are built for more bikes on the road.”

“I wouldn't cycle on roads at this time but would on purpose built cycle ways.”

“Cycles should not share a road designed and built for motor vehicles unless there is a very clear delineation. They should have their own separate infrastructure if there are that many who do want to cycle to work.”

In light of recent developments, perceptions of infrastructure are more positive in Christchurch with residents more likely to agree that:

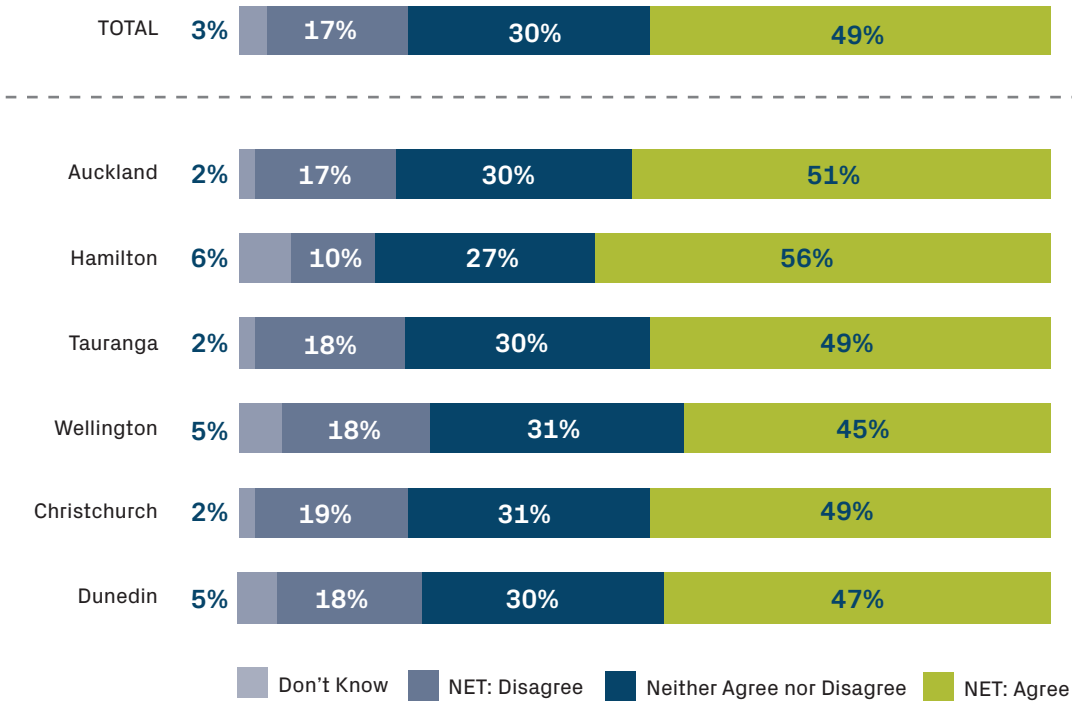
- My town has a well-connected network
- Satisfied with availability of paths/lanes
- There are more/better paths in my area

Q7. How much do you agree or disagree with the following statements other people have made about cycling?
 Base: Total sample 2018, n=2115, 2016, n=414.
 Due to methodological differences CATI in 2016 vs online in 2018, changes are to be viewed as indicative only.



The development of infrastructure continues to play a vital role in encouraging cycling behaviours

INFLUENCE OF INFRASTRUCTURE ON CYCLING



Around 1 in 2 cyclists state that the opening of new cycle ways and paths in their area have encouraged them to either start cycling, or to cycle more often.

This view is consistent across our regions.

"I would cycle more if there were more off road cycle pathways in my area."

"If the infrastructure is there, go nuts, if it isn't, use a car."

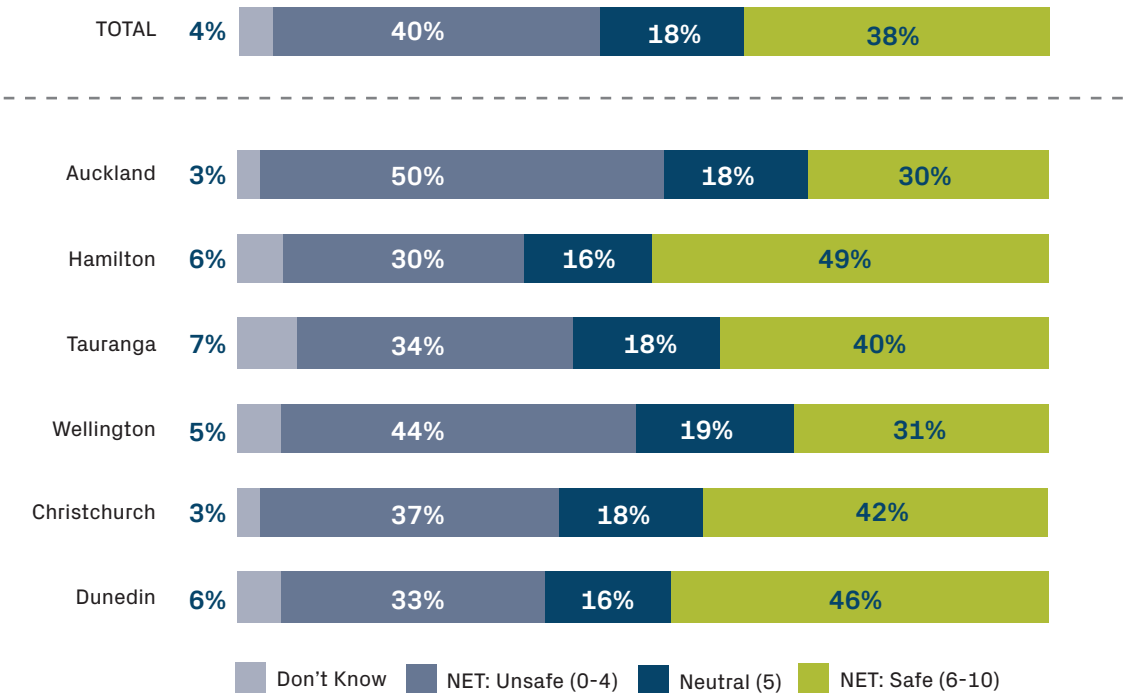
"Cycling on roads without cycle lanes can be dangerous, the correct infrastructure to support a large number of cyclists is not in place."

Q17 Now please think about the cycle ways and paths in your area. How strongly do you agree or disagree that the opening of cycle ways/paths in your area have encouraged you to cycle or cycle more?
 Base: Total cyclists, n=970. Auckland, n=202, Hamilton, n=97, Tauranga, n=103, Wellington, n=235, Christchurch, n=252, Dunedin, n=81.



Perceptions of safety present a key challenge to overcome in order to address cycling uptake

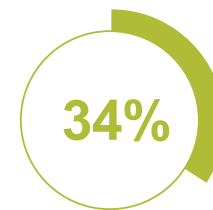
OVERALL SAFETY OF CYCLING



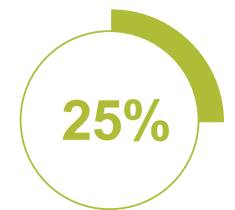
Only 4 in 10 consider cycling to be safe.
 An equal number deem it unsafe, although this is greater in Auckland and Wellington.

Perceptions are changing over time, but the response is mixed.

Compared to 2-3 years ago, more are likely to think it is less safe now than it was; a response that is again heightened amongst Aucklanders.



LESS SAFE



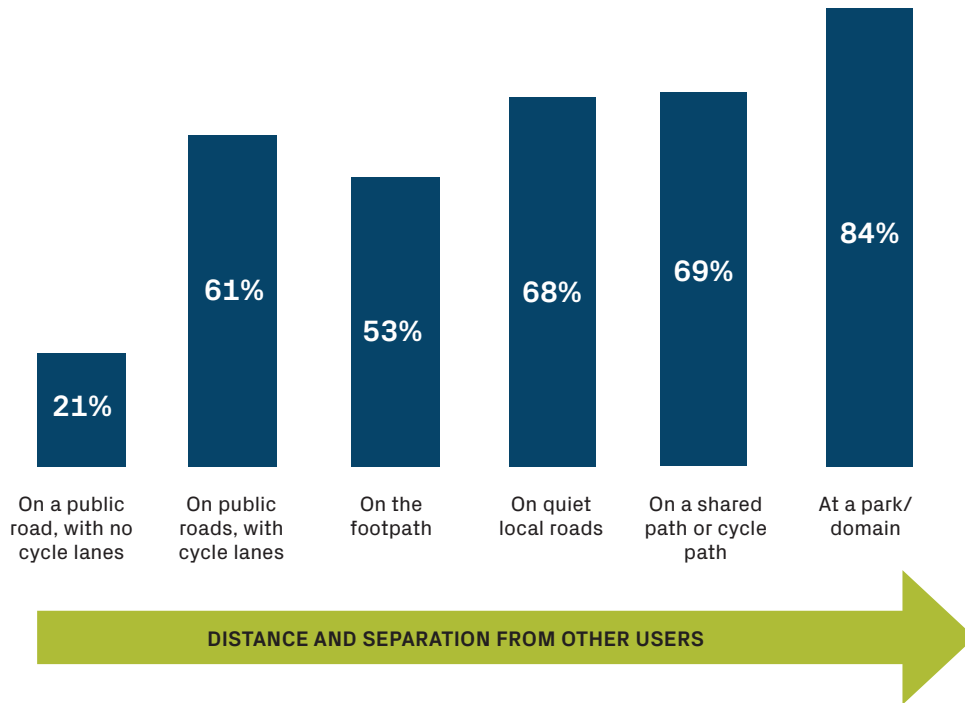
MORE SAFE

QA5a. In general, how safe are you/would you be, riding a bicycle in the [region] area? Base: Physically able to cycle n=1841
 Q10 Do you feel it has become more or less safe to cycle on the road than it was 2-3 years ago? Total sample, n=2,115



As the separation between cyclists and vehicles increases, so too do perceptions of cycling safety

PERCEPTIONS OF SAFETY – NET SAFE



While only 1 in 5 think it is safe to cycle on a road with no cycle lanes, perceptions of safety increase significantly when a road has dedicated cycle lanes.

The greater the separation between vehicle and cyclist, the greater the sense of safety.

Regionally, this pattern is also consistent. However, Aucklanders are more likely to see cycling on a public road as unsafe (both with or without cycle lanes).

QA5a. In general, how safe are you/would you be, riding a bicycle in the [region] area?
 Base: Physically able to cycle n=1841



Development and promotion of cycling infrastructure is key

The availability and accessibility of cycling infrastructure is both a driver, and barrier, to increasing the amount of cycling across the country.

The visibility of infrastructure increases the normalisation of cycling. It creates a safer environment for cyclists and other road users to travel. It can make a journey more efficient, and improves the overall cycling experience, thus encouraging cyclists to ride that way again.

Non-cyclists may be less attuned to the developments that are occurring across the country. There's an opportunity to educate non-cyclists of the improvements in infrastructure to help give them confidence in what has been done to address the barrier of safety.

IMPLICATION



Unlocking the opportunity in walking

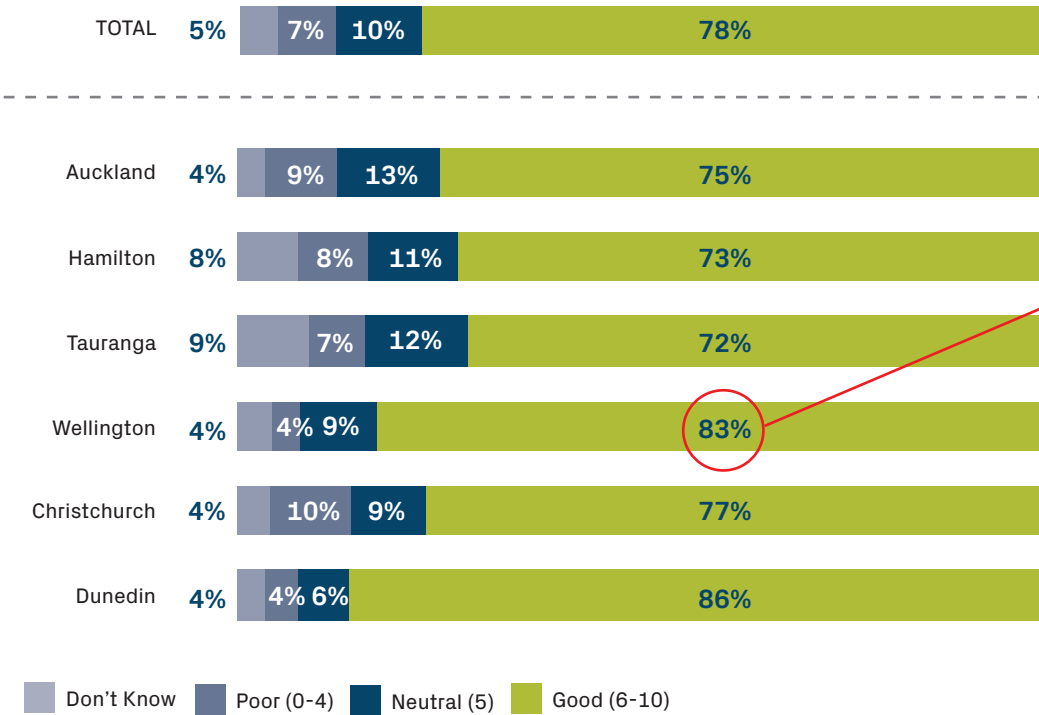
4

TRA



Public perception of walking is positive with 8 in 10 considering walking to be in a good position

OVERALL STATE OF WALKING



Across the regions, public perception in Wellington is even stronger.

This view is much more positive for walking, than is seen for cycling, across all regions.

This is positive, but the challenge will be to ensure that we do not accept the status quo, but we look for opportunities to improve the adoption of walking as a mode of transportation.

O2. Overall, how do you view the current state of walking in [your region]?
 Base: Total sample, n=2115. Auckland, n=507, Hamilton, n=201, Tauranga, n=200, Wellington, n=500, Christchurch, n=507, Dunedin, n=200

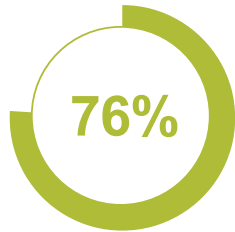


Walking presents many of the emotional and functional benefits that cycling can bring to people

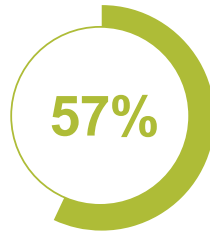
REASONS FOR WALKING

EMOTIONAL

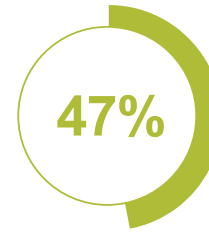
Keeps me fit/helps me get fitter



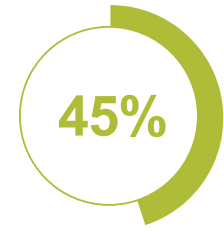
It's fun, I enjoy walking



Allows me to enjoy the weather

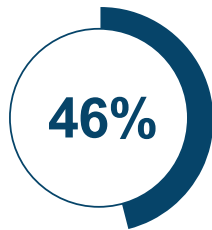


It provides me with some 'me time'

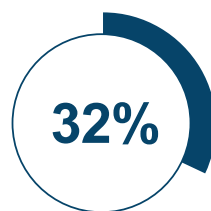


FUNCTIONAL

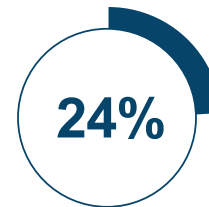
It's cheaper/saves money



Avoids parking hassles



More convenient than driving or public transport



▶ Wellington walkers are even more likely to cite the functional benefits of money savings, convenience and avoiding parking hassles as reasons for their walking choices.

Q33. Looking at the list below, what are the main reasons you choose to walk?
Base: Total walkers, n=1533.

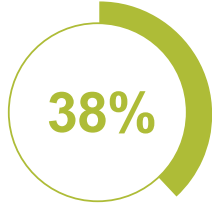


Safety is less of a barrier to increased walking; a range of practicalities may need to be overcome

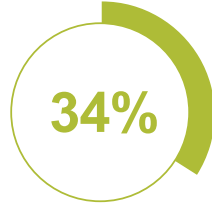
BARRIERS TO WALKING MORE OFTEN

EMOTIONAL

It's not enjoyable because of the weather



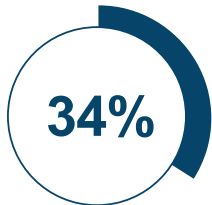
I don't feel safe walking in the dark



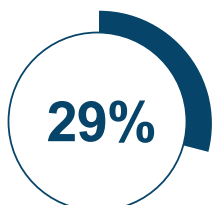
- ▶ Safety at night is a greater concern in the Hamilton area.
- ▶ The hilly terrain of Auckland and Dunedin are a barrier for some, though this doesn't come through for Wellington.

FUNCTIONAL

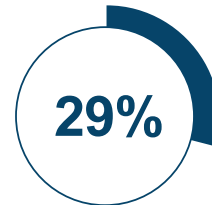
It's not a quick way for me to get where I need to go



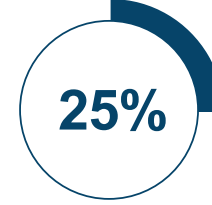
I always have too much stuff to carry



I live too far away for it to be practical



Walking adds too much time to my journey



Q34 Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
 Base: Physically able to walk n = 1,808

Walking is accessible, enjoyable and viewed positively in the community

In this benchmark measure, we see that public perception of walking in their local area is currently in a good stage. This can be compared to cycling, which demonstrates there is room for improvement.

Overall, people experience fewer barriers to walking. This enables higher levels of participation. And while there could be some functional barriers to walking for certain trips, we understand that ingrained and habitual travel behaviours also come in to play here.

The challenge will be to encourage incremental walking trips in our communities; challenging the status quo and demonstrating that we can, and need, to do more.

IMPLICATION

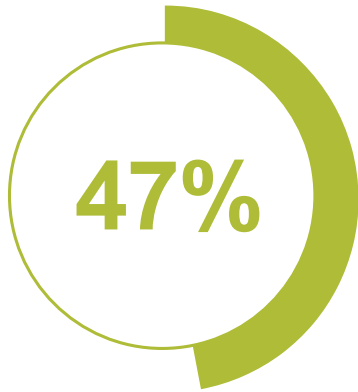




Although walking is a mode used by most, it isn't quite for everyone

WHO ISN'T WALKING?

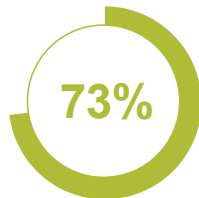
DO NOT WALK REGULARLY
(e.g. at least once a week).



While most New Zealanders do walk at least occasionally, it's not a regular activity for all.



In fact, 1 in 4 have not used it as a way of travelling in the past year.



For most non-walkers (73%), it is something that they would consider in the future.



For 15%, a disability or impairment may stop them from being able to walk 100m or cross a road.

There can also be difficulties that are experienced when using footpaths in their local areas. While it may only impact a small number, they may experience difficulties in:

- Getting out and about
- Using the footpaths in their area
- Crossing the road in their area

► **Generally, this impacts the older members of our communities**

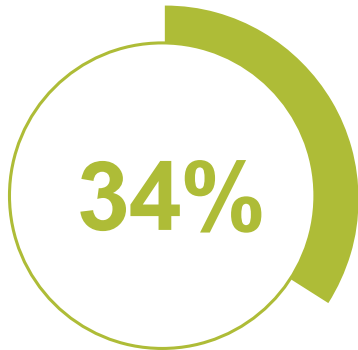
Q23b. And which of the following do you regularly use, e.g. once a week or more often? This can be for any reason, including work, sport or recreation.
Q1. Do you have any disability or impairment that affects your ability to walk?
Base: Total sample, n=2115



Walking is an activity which is undertaken by the majority; but it can be underutilised as a mode of transportation

THE OPPORTUNITY TO WALK MORE OFTEN

WALKING VS YEAR AGO



Although some are walking less (18%), it is positive to see that 1 in 3 are walking more than a year ago.

Within existing travel patterns, some do recognise that there is an opportunity to walk for trips that currently use an alternative mode.

This is around 10-20% of travellers for any given trip type.



What could motivate people to walk more often?

*Q32. And thinking about the walking that you do, would you say you are walking more often, less often or the same amount than a year ago?
Q35. And thinking about these trips you made in the last week. Would it be reasonable to walk for any of these?
Base Total Walker n=1,533. Those who travelled for a certain trip in the last week, but did not walk it, n=200 to n=1244.*



A more targeted approach is required to increase walking

Walking is not the challenge. Walking for certain types of urban trips is.

There is some opportunity to introduce people to walking as a regular activity. However, the greater opportunity is in switching travel modes for certain types of trips.

Not all travel is suitable for walking; travel over motorways, distance, with others. But what can we do to encourage 1-2 incremental walks each week?

There can be a range of practical barriers to walking, which may not be able to be overcome. But sometimes these barriers are perceptual, rather than real (e.g. perceived distance of travel).

Helping potential walkers realise the benefits of their change in travel choices can also encourage such behaviour.

IMPLICATION



TRA

5

Bringing it
all together

TRA

Bringing it all together



CYCLING

With the infrastructure build from the Urban Cycleway Programme, we are seeing more people beginning to cycle, not only overall but in urban settings and for car replacement trips.

As more and wider varieties of people cycle, especially in urban settings we are seeing a normalisation of behaviour. As support for cycling across the country is strong, it's important to continue with the engagement with communities as more infrastructure is built to promote cycling by all types of people.

With there being different push and pull factors for cycling across the regions, it is important to utilise a multi-faceted approach to encourage behaviour change.



WALKING

Most people walk, the challenge is to encourage walking for utility trips.

Key groups to target is under 35s who are likely to walk to work/town or to get around town and are less likely to feel it's not reasonable to walk for urban trips. If we can get these groups in the habit of using active modes for common urban trips, then when the behaviour is ingrained it will be more likely to continue as they pass through the different life stages.

Appendix

Motivators to Cycling...

REASON	TOTAL	Auckland	Wellington	Christchurch	Hamilton	Tauranga	Dunedin
Keeps me fit/helps me get fitter	78%	70%	78%	79%	80%	84%	86%
It's fun, I enjoy cycling	66%	71%	63%	65%	61%	74%	63%
It's cheaper/saves money	56%	47%	56%	60%	61%	56%	57%
Avoids parking hassles	39%	35%	40%	39%	38%	43%	42%
Helps address environmental concerns	37%	32%	41%	38%	41%	38%	33%
Allows me to enjoy the weather	34%	34%	34%	34%	35%	38%	30%
Provides me with some 'me time'	33%	32%	29%	32%	38%	40%	38%
Saves time - I can get there faster by bike	22%	19%	22%	24%	20%	16%	31%
Too much traffic to drive - helps reduce traffic congestion	21%	23%	19%	22%	17%	25%	16%
Availability of cycle ways or cycle paths	20%	17%	13%	22%	30%	23%	24%
Separate off-road paths make it safer to cycle	19%	17%	16%	18%	21%	30%	22%
More convenient than driving/public transport	18%	15%	17%	20%	22%	17%	17%
Painted cycle lanes make it safer to cycle	17%	12%	15%	17%	20%	23%	20%
Better routes are available than previously	11%	8%	9%	9%	20%	17%	12%
Want to make the most of a new bike	9%	9%	11%	8%	7%	11%	9%
Availability of cycle parking at public transport interchanges/stations	8%	8%	7%	7%	8%	10%	8%
There's physical barriers between motorists & cyclists	7%	7%	5%	8%	7%	7%	11%
Other	4%	3%	5%	4%	2%	5%	3%

Q11a. From the list below, what are the key reasons you choose to cycle?
 Total = 970. Auckland = 202, Wellington = 235, Christchurch = 252, Hamilton = 97, Tauranga = 103, Dunedin = 81

Barriers to Cycling...

REASON	TOTAL	Auckland	Wellington	Christchurch	Hamilton	Tauranga	Dunedin
I don't feel safe because of how people drive	52%	57%	51%	51%	56%	50%	46%
I don't feel safe cycling in the dark	44%	46%	44%	43%	47%	40%	42%
It's not enjoyable because of the weather	38%	38%	42%	43%	29%	20%	41%
There's not enough cycle lanes or routes that are physically separated from drivers	35%	42%	38%	31%	31%	30%	30%
I always have too much stuff to carry	34%	35%	33%	37%	30%	29%	35%
I live too far away for it to be practical	30%	36%	29%	28%	28%	31%	29%
Cycling is not a quick way for me to get where I need to go	30%	36%	26%	32%	31%	28%	23%
I don't have access to a bike	28%	33%	30%	16%	30%	28%	38%
Having to shower and/or change after cycling is inconvenient	27%	29%	30%	27%	22%	22%	30%
There's no secure place to leave a bike when out and about	27%	32%	28%	22%	34%	23%	22%
There's not enough painted cycle lanes on roads in my area	25%	32%	26%	17%	27%	23%	21%
It's not enjoyable because of the hills	23%	29%	32%	7%	14%	12%	44%
I have to think about transporting other people	21%	23%	18%	23%	25%	20%	14%
I can't be bothered/too much effort	18%	19%	17%	17%	17%	18%	20%
I don't like wearing a helmet	15%	16%	14%	14%	14%	12%	17%
I don't know enough about cycling or where to get information	7%	6%	8%	4%	8%	6%	11%
Some other reason	7%	6%	5%	8%	7%	9%	9%

Q11b Sometimes people tell us there are things that stop them from cycling as much as they otherwise would...which of these statements, if any, apply to you?
 Total = 1814. Auckland = 427, Wellington = 435, Christchurch = 434, Hamilton = 174, Tauranga = 169, Dunedin = 175

Motivators to Walking...

REASON	TOTAL	Auckland	Wellington	Christchurch	Hamilton	Tauranga	Dunedin
Keeps me fit/helps me get fitter	76%	75%	77%	76%	74%	79%	77%
It's fun, I enjoy walking	57%	56%	60%	57%	53%	55%	53%
Allows me to enjoy the weather	47%	49%	46%	53%	46%	47%	39%
It's cheaper/saves money	46%	41%	53%	43%	43%	39%	49%
Provides me with some 'me time'	45%	43%	47%	46%	45%	47%	45%
Avoids parking hassles	32%	32%	39%	29%	23%	25%	35%
Availability of paths/walking routes	30%	30%	33%	24%	29%	34%	34%
More convenient than driving/public transport	24%	19%	36%	21%	14%	15%	30%
Helps address environmental concerns	20%	19%	26%	20%	18%	14%	19%
Saves time - I can get there faster by walking	18%	17%	23%	13%	19%	17%	23%
There is no other way to get where I want to go	15%	13%	21%	11%	10%	11%	18%
Too much traffic to drive - helps reduce traffic congestion	14%	17%	18%	10%	9%	11%	15%
Better walking routes are available now	11%	11%	12%	9%	12%	12%	10%
Other	7%	5%	7%	9%	7%	6%	9%

Q33 Looking at the list below, what are the main reasons you choose to walk?
 Total = 1533. Auckland = 336, Wellington = 379, Christchurch = 368, Hamilton = 145, Tauranga = 142, Dunedin = 163

Barriers to Walking...

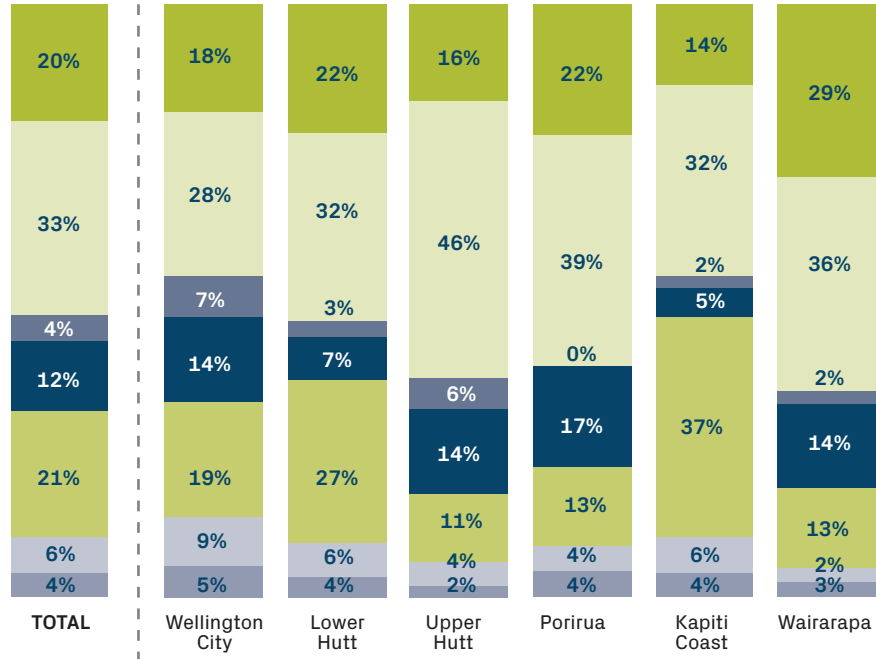
REASON	TOTAL	Auckland	Wellington	Christchurch	Hamilton	Tauranga	Dunedin
It's not enjoyable because of the weather	38%	39%	43%	36%	40%	32%	38%
Walking is not a quick way for me to get where I need to go	34%	36%	34%	34%	37%	33%	29%
I don't feel safe walking in the dark	34%	38%	31%	33%	45%	27%	28%
I always have too much stuff to carry	29%	34%	26%	31%	30%	26%	25%
I live too far away for it to be practical	29%	31%	27%	30%	34%	29%	23%
Walking adds too much time to my journey	25%	29%	26%	25%	25%	19%	23%
I have to think about transporting other people	19%	23%	18%	21%	26%	12%	10%
I can't be bothered/too much effort	16%	20%	17%	17%	16%	12%	10%
I don't know how long walking will take	12%	13%	12%	11%	16%	13%	10%
It's not enjoyable because of the hills	12%	17%	15%	3%	8%	9%	23%
Having to shower and/or change after walking is inconvenient	10%	12%	12%	8%	10%	8%	9%
The pavements/footpaths are not in good condition in my area	9%	10%	6%	11%	10%	10%	9%
I don't feel safe because of how people drive	8%	10%	8%	7%	12%	7%	5%
Some other reason	5%	4%	6%	7%	4%	5%	8%
I don't feel safe walking in the day	5%	5%	4%	4%	6%	6%	2%
None of these	14%	10%	17%	11%	15%	18%	18%

Q34 Sometimes people tell us there are things that stop them walking as much as they otherwise would. Which of these statements, if any, apply to you?
 Total = 1808. Auckland = 420, Wellington = 439, Christchurch = 439, Hamilton = 169, Tauranga = 170, Dunedin = 171

A snapshot of the Wellington Region

Wellington region in more detail...

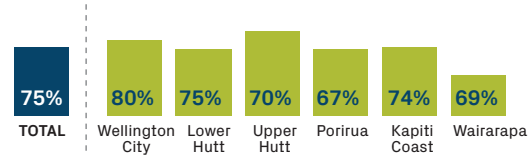
CYCLING SEGMENTS



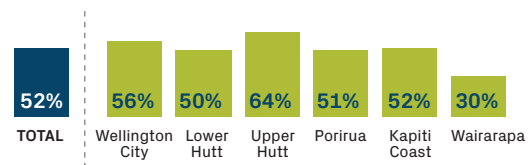
Committed commuter
 Regular urban riders
 Occasional urban rider
 Recreational on road
 Recreational off road
 Supportive non rider
 Less supportive non rider

Total base: Wellington = 500. Wellington City = 197, Upper Hutt = 52, Lower Hutt = 115, Kapiti Coast = 48, Porirua = 46, Wairarapa = 42

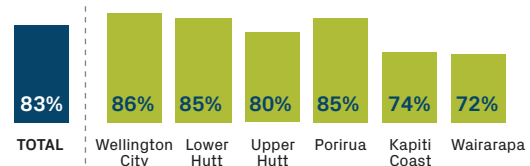
CURRENT WALKERS



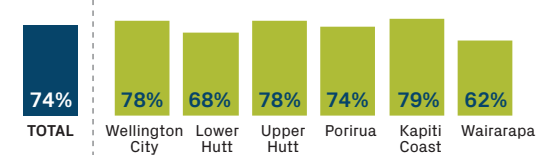
STATE OF CYCLING - GOOD



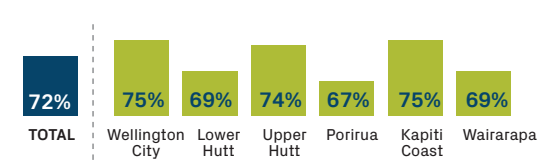
STATE OF WALKING - GOOD



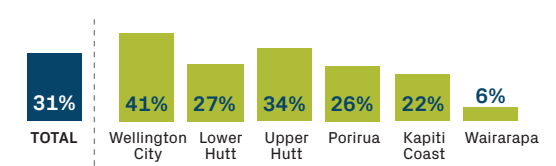
SUPPORT FOR CYCLING



SUPPORT FOR CYCLING IF PARKING NOT IMPACTED



SAFETY PERCEPTIONS



Wellington region in more detail...

STATEMENTS	WELLINGTON TOTAL	WELLINGTON CITY	LOWER HUTT	UPPER HUTT	PORIRUA	KAPITI COAST	WAIRARAPA
It is becoming more popular for people to use a bicycle to get to work, study or to the shops	58%	60%	52%	62%	52%	73%	47%
Investing in cycle lanes is important because it gives people more travel options	69%	71%	67%	68%	70%	73%	60%
The more people using bicycles, the better it is for drivers	36%	34%	40%	40%	33%	42%	24%
Cycling is a great way to get around town easily and efficiently	67%	66%	66%	72%	65%	78%	61%
My town has a well - connected cycle network	31%	30%	28%	34%	31%	51%	18%
Cyclists are sufficiently separated from traffic	17%	21%	11%	19%	16%	14%	17%
I'm satisfied with the availability of cycle paths/lanes in my community	30%	28%	30%	38%	30%	40%	19%
There are more/better cycle paths/lanes in my area	27%	28%	18%	34%	30%	44%	13%

Total base: Wellington = 500, Wellington City = 197, Upper Hutt = 52, Lower Hutt = 115, Kapiti Coast = 48, Porirua = 46, Wairarapa = 42

Details of the cycling segments

Segments in 2018...

SEGMENT	TOTAL (change since 2016)	Auckland	Wellington	Christchurch	Hamilton	Tauranga	Dunedin
Committed commuter	4% (+2)	2%	4%	5%	5%	5%	4%
Regular urban riders	8% (+3)	10%	6%	7%	12%	12%	4%
Occasional urban rider	21% (+5)	16%	21%	24%	23%	22%	20%
Recreational on road	10% (-7)	9%	12%	10%	8%	10%	10%
Recreational off road	4% (-5)	4%	4%	4%	2%	4%	3%
Supportive non rider	33% (+5)	32%	33%	30%	36%	35%	38%
Less supportive non rider	21% (-3)	28%	20%	20%	15%	13%	21%
Urban riders	33% (+10)	27%	31%	36%	40%	38%	28%
Recreational riders	14% (-12)	13%	16%	13%	9%	14%	13%
Non riders	54% (+2)	60%	52%	50%	50%	48%	59%

NOTE: numbers are rounded to the nearest whole

2016 Total CATI = 414

2018 Total = 2115. Auckland = 507, Wellington = 500, Christchurch = 507, Hamilton = 201, Tauranga = 200, Dunedin = 200

Due to methodological differences between 2016 and 2018, whereby 2016 was conducted using CATI (telephone interviews) and 2018 was conducted online, any changes over time must be viewed as indicative shifts only.

Committed Commuters



PROFILE:

Age: 18-34 years
Gender: Male
Region: Christchurch
HH Income: \$100k and over
HH Structure: Single income no kids
No. of people in HH: 3 – 4 people
Self identification: Regular commuter, FASTER commuter

OVERALL PERCEPTIONS

State of Cycling: Very good
State of Walking: Very good
Of Cyclists: Positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Safe
Areas safe: Public roads, shared path of cycle path, quiet local roads, footpath
Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

Mixed opinion - similar skew towards more safe and less safe

LEVEL OF CYCLING SUPPORT

In community: Very supportive
If parking not impacted: Very supportive

AGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work
- My family encourage and support that I cycle
- My friends admire and encourage me to cycle
- I believe that cycling improves my personal image to my peers
- Cycle ways/paths in area have encouraged you to cycle / cycle more

WALKING BEHAVIOURS

Walking more often than a year ago
 Already walk often for family outings
 In next 12 months, likely to walk to:

- Commute to and from work / study
- To get around town

GENERAL BEHAVIOURS

Regularly use bicycle, electric bike
 In the last week, travelled for:

- Work, study, public transport, organised sport, recreation or fitness

Consider it easy to:

- Use the footpaths in your area

Regular Urban Riders

8%



PROFILE:

Age: 25-34 years

Gender: Male

Region: Auckland, Hamilton, Tauranga

HH Income: No skew

HH Structure: Single income no kids, Double income no kids

No. of people in HH: 3– 4 people

Self identification: Casual cyclist, Regular commuter, Faster commuter

OVERALL PERCEPTIONS

Overall state of Cycling: Very good

Overall state of Walking: No skew

Of Cyclists: Positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Safe

Areas safe: Public roads, shared path of cycle path, quiet local roads, footpath

Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

More safe

LEVEL OF CYCLING SUPPORT

In community: Very supportive

If parking not impacted: Very supportive

AGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work
- My family encourage and support that I cycle
- My friends admire and encourage me to cycle
- I believe that cycling improves my personal image to my peers
- Cycle ways/paths in area have encouraged you to cycle / cycle more

WALKING BEHAVIOURS

Walking more often than a year ago

Already walk often for family outings

In next 12 months, likely to walk to:

- Commute to and from work / study
- To get around town

GENERAL BEHAVIOURS

Regularly use bus, bicycle

In the last week, travelled for:

Public transport, organised sport, recreation or fitness

Occasional Urban Riders



PROFILE:

Age: 18-24 years, 35-44 years

Gender: No skew

Region: Christchurch

HH Income: \$100k and over

HH Structure: Families

No. of people in HH: 5 or more

Self identification: Casual cyclist

OVERALL PERCEPTIONS

Overall state of Cycling: Very good

Overall state of Walking: No skew

Of Cyclists: Positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Safe

Areas safe: Public roads with cycle lanes, shared path of cycle path, quiet local roads, footpath, park / domain

Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

More safe

LEVEL OF CYCLING SUPPORT

In community: Very supportive

If parking not impacted: Very supportive

AGREE THAT

- I have lots of friends and family who cycle

WALKING BEHAVIOURS

Walking more often than a year ago

Already walk often for family outings

In next 12 months, likely to walk to:

- Commute to and from work / study
- To get around town
- For recreational purposes

GENERAL BEHAVIOURS

Regularly walk

In the last week, travelled for:

- Study, as part of job, organised sport, recreation or fitness

Consider it easy to:

- Get out and about outside
- Use the footpaths in your area
- Cross the road in your area

Recreational On Road Riders



PROFILE:

Age: 18-24 years
Gender: Female
Region: Wellington
HH Income: \$50k and over
HH Structure: No skew
No. of people in HH: No skew
Self identification: Leisure cyclist

OVERALL PERCEPTIONS

Overall state of Cycling: Good
Overall state of Walking: No skew
Of Cyclists: Slightly positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Unsafe
Areas safe: Park / domain
Areas unsafe: Public roads especially if there are no cycle lanes

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

Less safe

LEVEL OF CYCLING SUPPORT

In community: Very supportive
If parking not impacted: Very supportive

DISAGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work
- My family encourage and support that I cycle
- My friends admire and encourage me to cycle
- I believe that cycling improves my personal image to my peers
- Cycle ways/paths in area have encouraged you to cycle / cycle more

WALKING BEHAVIOURS

Walking the same as a year ago

In next 12 months, likely to walk to:

- For recreational purposes

GENERAL BEHAVIOURS

Regularly use private vehicle, walk

In the last week, travelled for:

- Work, shopping, as part of job, recreation or fitness

Consider it easy to:

- Get out and about outside
- Use the footpaths in your area
- Cross the road in your area

Recreational Off Road Riders



PROFILE:

Age: 18-24 years, 35-44 years

Gender: Female

Region: Wellington

HH Income: No skew

HH Structure: Double income no kids, Families

No. of people in HH: 3 – 4 people

Self identification: Leisure cyclist

OVERALL PERCEPTIONS

Overall state of Cycling: Very Poor

Overall state of Walking: Good

Of Cyclists: Neutral, slightly negative

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Lean towards unsafe

Areas safe: No skew

Areas unsafe: Public roads, shared path of cycle path, quiet local roads, footpath

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

More safe

LEVEL OF CYCLING SUPPORT

In community: Very unsupportive

If parking not impacted: Very unsupportive

DISAGREE THAT

- At work, lots of my colleagues cycle to work
- My family encourage and support that I cycle
- My friends admire and encourage me to cycle
- I believe that cycling improves my personal image to my peers
- Cycle ways/paths in area have encouraged you to cycle / cycle more

WALKING BEHAVIOURS

Walking the same as a year ago

Already walk for family outings

In next 12 months, likely to walk to:

- For recreational purposes

GENERAL BEHAVIOURS

Regularly walk

In the last week, travelled for:

- Work, visit friends or family

Supportive Non Riders



33%



PROFILE:

Age: 65 years and over

Gender: Female

Region: No skew

HH Income: Less than \$50k

HH Structure: Older (no kids at home or living alone)

No. of people in HH: 1 – 2 people

Future cycling consideration: Would consider

OVERALL PERCEPTIONS

Overall state of Cycling: No skew

Overall state of Walking: Very good

Of Cyclists: Slightly positive

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: No skew

Areas safe: Public roads with cycle lanes, quiet local roads

Areas unsafe: No skew

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

No skew towards safe or unsafe

LEVEL OF CYCLING SUPPORT

In community: Very supportive

If parking not impacted: Very supportive

WALKING BEHAVIOURS

Walking less than a year ago

GENERAL BEHAVIOURS

In the last week, travelled for:

- Doctor / dentist / pharmacy

Less Supportive Non Riders

21%



PROFILE:

Age: 65 years and over

Gender: No skew

Region: Auckland

HH Income: No skew

HH Structure: Older (no kids at home or living alone)

No. of people in HH: 1 - 2 people

Future cycling consideration:
Would not consider

OVERALL PERCEPTIONS

Overall state of Cycling: Very poor

Overall state of Walking: Neutral

Of Cyclists: Negative

SAFETY PERCEPTIONS

RIDING A BICYCLE IN AREA

Overall perception: Unsafe

Areas safe: No skew

Areas unsafe: Public roads, shared path of cycle path, quiet local roads, footpath, park / domain

ON ROAD CYCLING RELATIVE TO 2-3 YEARS AGO

Less safe

LEVEL OF CYCLING SUPPORT

In community: Very supportive

If parking not impacted: Very unsupportive

DISAGREE THAT

- I have lots of friends and family who cycle
- At work, lots of my colleagues cycle to work

WALKING BEHAVIOURS

Walking the same or less than a year ago

Not reasonable to walk for family outings

GENERAL BEHAVIOURS

Regularly use private vehicle

Let's talk

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