Understanding attitudes and perceptions of Cycling & Walking

NZTA
Agenda

1. Understanding overall travel behaviour
2. Spotlight on cycling behaviour
3. Attitudes & Perceptions of cycling
4. Unlocking the opportunity in walking
5. Bringing it all together
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 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
The car is the dominant mode of transportation, but active modes play a significant role in travel choices.

REGULAR MODES OF TRANSPORTATION

- Private or company motor vehicle: 68%
- Walking*: 53%
- Bus: 19%
- Bicycle: 12%
- Train: 7%
- Motorbike or scooter: 3%
- Other: 2%
- Electric bike (e-bike): 1%
- Ferry: 1%
- None of the above: 4%

*Walking 100m or crossing a road

58% are either walking or cycling regularly.
Transportation choices differ by region; active modes are more established in the south

**REGULAR MODES OF TRANSPORTATION – BY REGION**

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

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


*Walking 100m or crossing the road

Approved for public release © TRA 2018
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

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

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

24% Walking
58% Car
7% Bicycle
6% Bus or Train
1% Motorcycle
2% Taxi or other
1% Other
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

- **To/from work**: 23% (by car), 13% (on foot), 44% (by bike), 31% (by public transport), 16% (by other).
- **To/from shops**: 20% (by car), 17% (on foot), 8% (by bike), 11% (by public transport), 11% (by other).
- **To/from visiting friends/family**: 13% (by car), 8% (on foot), 8% (by bike), 10% (by public transport), 10% (by other).
- **For recreation or fitness**: 5% (by car), 20% (on foot), 3% (by bike), 2% (by public transport), 19% (by other).
- **To/from somewhere else**: 9% (by car), 9% (on foot), 4% (by bike), 8% (by public transport), 10% (by other).
- **Take children to school/day care**: 9% (by car), 3% (on foot), 3% (by bike), 3% (by public transport), 1% (by other).
- **To get to/from school, college, university**: 3% (by car), 9% (on foot), 13% (by bike), 14% (by public transport), 11% (by other).
- **As a part of work**: 7% (by car), 3% (on foot), 3% (by bike), 4% (by public transport), 2% (by other).
- **To/from public transport**: 2% (by car), 12% (on foot), 11% (by bike), 12% (by public transport), 5% (by other).
- **To/from doctor/dentist/ pharmacy**: 5% (by car), 4% (on foot), 2% (by bike), 5% (by public transport), 4% (by other).
- **For organised sport**: 3% (by car), 2% (on foot), 2% (by bike), 2% (by public transport), 11% (by other).

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.
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

2018 was the first time we asked about walking behaviour.

Total walker 72%
Regular (at least once a week) 53%
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.
Urban riders now make up a greater proportion of those who have 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.

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

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
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.
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

**TABLE**

<table>
<thead>
<tr>
<th>Region</th>
<th>Non Rider</th>
<th>Urban Cyclist</th>
<th>Recreational Cyclist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auckland</td>
<td>46%</td>
<td>54%</td>
<td>14%</td>
</tr>
<tr>
<td>Hamilton</td>
<td>50%</td>
<td>40%</td>
<td>9%</td>
</tr>
<tr>
<td>Tauranga</td>
<td>52%</td>
<td>38%</td>
<td>14%</td>
</tr>
<tr>
<td>Wellington</td>
<td>50%</td>
<td>31%</td>
<td>16%</td>
</tr>
<tr>
<td>Christchurch</td>
<td>41%</td>
<td>50%</td>
<td>13%</td>
</tr>
<tr>
<td>Dunedin</td>
<td>59%</td>
<td>28%</td>
<td>13%</td>
</tr>
</tbody>
</table>
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.
Spotlight on Cycling
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:

- **38% LEISURE CYCLIST**
- **21% CASUAL CYCLIST**
- **10% FAMILY GROUP**
- **10% REGULAR COMMUTER**
- **9% FASTER COMMUTER**
- **6% ROAD CYCLIST**
- **4% SCHOOL STUDENT**
- **3% GROUP ROAD CYCLIST**

► 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.

30%

At work, lots of my colleagues cycle to work.

19%

SOCIAL ACCEPTANCE - Cyclists
My family encourage and support that I cycle.

47%

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

33%

My friends admire and encourage me to cycle.

32%

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**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>For recreation or fitness</td>
<td>19%</td>
</tr>
<tr>
<td>For organised sport (e.g. track racing, mountain biking)</td>
<td>11%</td>
</tr>
<tr>
<td>To get to or from work</td>
<td>16%</td>
</tr>
<tr>
<td>To get to or from shops (e.g. groceries, clothing, post shop, banking)</td>
<td>11%</td>
</tr>
<tr>
<td>To get to or from school, college, university</td>
<td>11%</td>
</tr>
<tr>
<td>To go to or from visiting friends or family</td>
<td>10%</td>
</tr>
<tr>
<td>To get to or from public transport</td>
<td>5%</td>
</tr>
<tr>
<td>NET Other types of trips</td>
<td>16%</td>
</tr>
</tbody>
</table>

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

**REASONS FOR CYCLING**

**EMOTIONAL**
- Keeps me fit/helps me get fitter: 78%
- It’s fun, I enjoy cycling: 66%
- Allows me to enjoy the weather: 34%
- It provides me with some ‘me time’: 33%

**FUNCTIONAL**
- It’s cheaper/saves money: 56%
- Avoids parking hassles: 39%
- It addresses environmental concerns: 37%

G11a. 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

**EMOTIONAL**
- I don’t feel safe because of how people drive: 52%
- I don’t feel safe cycling in the dark: 44%
- It’s not enjoyable because of the weather: 38%

**FUNCTIONAL**
- There’s not enough cycle lanes or routes that are physically separated from drivers: 35%
- I always have too much stuff to carry: 34%
- I live too far away for it to be practical: 30%
- Cycling is not a quick way for me to get where I need to go: 30%

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).

- **HAMILTON**: More likely to consider improved routes as reasons for cycling.

- **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.

- **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.

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

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

<table>
<thead>
<tr>
<th>SUPPORT FOR CYCLING IN THE COMMUNITY</th>
<th>NET UNSUPPORTIVE</th>
<th>NET SUPPORTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>3%</td>
<td>51%</td>
</tr>
<tr>
<td>Auckland</td>
<td>11%</td>
<td>46%</td>
</tr>
<tr>
<td>Hamilton</td>
<td>4%</td>
<td>53%</td>
</tr>
<tr>
<td>Tauranga</td>
<td>6%</td>
<td>54%</td>
</tr>
<tr>
<td>Wellington</td>
<td>6%</td>
<td>51%</td>
</tr>
<tr>
<td>Christchurch</td>
<td>8%</td>
<td>49%</td>
</tr>
<tr>
<td>Dunedin</td>
<td>4%</td>
<td>48%</td>
</tr>
</tbody>
</table>

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.”

“Good for the environment”

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

“Good for the environment than cars and provides good exercise.”

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

“Promotes a healthy lifestyle”

“Good exercise and good environment.”

BUT SOME FACTORS CONSTRAIN THAT SUPPORT:

“Good exercise, but roads unsafe.”

“Unsafe/dangerous”

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

“A nuisance”

“Cycling lanes are a nuisance.”

“Cyclists thought of negatively”

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

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

APPROVED FOR PUBLIC RELEASE © TRA 2018
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.
Community engagement helps to maintain the support for investment in cycling infrastructure

PERCEPTIONS OF CYCLING INFRASTRUCTURE

<table>
<thead>
<tr>
<th>Statement</th>
<th>NET AGREE 2018</th>
<th>NET AGREE VS 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investing in cycle lanes is important as it gives people more travel options</td>
<td>2%</td>
<td>71</td>
</tr>
<tr>
<td>Cycling is a great way to get around town easily and efficiently</td>
<td>2%</td>
<td>68</td>
</tr>
<tr>
<td>It is becoming more popular for people to use a bicycle to get to work, study or to the shops</td>
<td>4%</td>
<td>57</td>
</tr>
<tr>
<td>My town has a well-connected cycle network</td>
<td>7%</td>
<td>39</td>
</tr>
<tr>
<td>The more people using bicycles, the better it is for drivers</td>
<td>3%</td>
<td>38</td>
</tr>
<tr>
<td>I'm satisfied with the availability of cycle paths/lanes in my community</td>
<td>4%</td>
<td>37</td>
</tr>
<tr>
<td>There are more/better cycle paths/lanes in my area</td>
<td>6%</td>
<td>35</td>
</tr>
<tr>
<td>Cyclists are sufficiently separated from traffic</td>
<td>3%</td>
<td>22</td>
</tr>
</tbody>
</table>

“In 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.”

Don’t Know Strongly Disagree Disagree Neutral Agree Strongly Agree

4% 6% 15% 41% 30% 71

3% 8% 19% 44% 23% 68

4% 31% 26% 43% 13% 57

7% 8% 18% 28% 31% 8% 39

3% 9% 18% 33% 25% 13% 38

4% 9% 22% 27% 30% 7% 37

6% 8% 23% 28% 28% 7% 35

3% 13% 38% 25% 18% 4% 22

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

07. How much do you agree or disagree with the following statements other people have made about cycling?


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**

<table>
<thead>
<tr>
<th>Location</th>
<th>Don't Know</th>
<th>NET: Disagree</th>
<th>Neither Agree nor Disagree</th>
<th>NET: Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>3%</td>
<td>17%</td>
<td>30%</td>
<td>49%</td>
</tr>
<tr>
<td>Auckland</td>
<td>2%</td>
<td>17%</td>
<td>30%</td>
<td>51%</td>
</tr>
<tr>
<td>Hamilton</td>
<td>6%</td>
<td>10%</td>
<td>27%</td>
<td>56%</td>
</tr>
<tr>
<td>Tauranga</td>
<td>2%</td>
<td>18%</td>
<td>30%</td>
<td>49%</td>
</tr>
<tr>
<td>Wellington</td>
<td>5%</td>
<td>18%</td>
<td>31%</td>
<td>45%</td>
</tr>
<tr>
<td>Christchurch</td>
<td>2%</td>
<td>19%</td>
<td>31%</td>
<td>49%</td>
</tr>
<tr>
<td>Dunedin</td>
<td>5%</td>
<td>18%</td>
<td>30%</td>
<td>47%</td>
</tr>
</tbody>
</table>

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?


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

OVERALL SAFETY OF CYCLING

TOTAL 4% Don't Know | NET: Unsafe (0-4) | Neutral (5) | NET: Safe (6-10)

Auckland 3% Don't Know | NET: Unsafe (0-4) | Neutral (5) | NET: Safe (6-10)

Hamilton 6% Don't Know | NET: Unsafe (0-4) | Neutral (5) | NET: Safe (6-10)

Tauranga 7% Don't Know | NET: Unsafe (0-4) | Neutral (5) | NET: Safe (6-10)

Wellington 5% Don't Know | NET: Unsafe (0-4) | Neutral (5) | NET: Safe (6-10)

Christchurch 3% Don't Know | NET: Unsafe (0-4) | Neutral (5) | NET: Safe (6-10)

Dunedin 6% Don't Know | NET: Unsafe (0-4) | Neutral (5) | NET: Safe (6-10)

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.
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).

Q05a. 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.
Unlocking the opportunity in walking
Public perception of walking is positive with 8 in 10 considering walking to be in a good position

OVERALL STATE OF WALKING

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

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.
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: 76%
- It’s fun, I enjoy walking: 57%
- Allows me to enjoy the weather: 47%
- It provides me with some ‘me time’: 45%

**FUNCTIONAL**
- It’s cheaper/saves money: 46%
- Avoids parking hassles: 32%
- More convenient than driving or public transport: 24%

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

- It's not enjoyable because of the weather (38%)
- I don't feel safe walking in the dark (34%)
- It's not a quick way for me to get where I need to go (34%)
- I always have too much stuff to carry (29%)
- I live too far away for it to be practical (29%)
- Walking adds too much time to my journey (25%)
- 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.
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.
Although walking is a mode used by most, it isn’t quite for everyone

WHO ISN’T WALKING?

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.

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

47%

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?

G32. 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?
G35. 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.
Bringing it all together
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.
## Motivators to Cycling…

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

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...

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

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...

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

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

APPROVED FOR PUBLIC RELEASE © TRA 2018
## Barriers to Walking...

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

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

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A snapshot of the Wellington Region
Wellington region in more detail…

**Cycling Segments**

<table>
<thead>
<tr>
<th></th>
<th>Wellington City</th>
<th>Lower Hutt</th>
<th>Upper Hutt</th>
<th>Porirua</th>
<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>20%</td>
<td>18%</td>
<td>22%</td>
<td>16%</td>
<td>22%</td>
<td>29%</td>
</tr>
<tr>
<td>Committed</td>
<td>33%</td>
<td>28%</td>
<td>32%</td>
<td>46%</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>Regular</td>
<td>4%</td>
<td>7%</td>
<td>3%</td>
<td>6%</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Commuter</td>
<td>12%</td>
<td>14%</td>
<td>7%</td>
<td>6%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Occasional</td>
<td>21%</td>
<td>19%</td>
<td>27%</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Urban</td>
<td>6%</td>
<td>9%</td>
<td>6%</td>
<td>11%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Non rider</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Current Walkers**

<table>
<thead>
<tr>
<th></th>
<th>Wellington City</th>
<th>Lower Hutt</th>
<th>Upper Hutt</th>
<th>Porirua</th>
<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>75%</td>
<td>80%</td>
<td>75%</td>
<td>70%</td>
<td>67%</td>
<td>74%</td>
</tr>
<tr>
<td>Supported</td>
<td>74%</td>
<td>78%</td>
<td>68%</td>
<td>78%</td>
<td>74%</td>
<td>79%</td>
</tr>
<tr>
<td>State</td>
<td>52%</td>
<td>56%</td>
<td>50%</td>
<td>64%</td>
<td>51%</td>
<td>52%</td>
</tr>
<tr>
<td>Good</td>
<td>83%</td>
<td>86%</td>
<td>85%</td>
<td>80%</td>
<td>85%</td>
<td>74%</td>
</tr>
</tbody>
</table>

**Support for Cycling**

<table>
<thead>
<tr>
<th></th>
<th>Wellington City</th>
<th>Lower Hutt</th>
<th>Upper Hutt</th>
<th>Porirua</th>
<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>74%</td>
<td>78%</td>
<td>68%</td>
<td>78%</td>
<td>74%</td>
<td>79%</td>
</tr>
<tr>
<td>Supported</td>
<td>72%</td>
<td>75%</td>
<td>69%</td>
<td>74%</td>
<td>67%</td>
<td>75%</td>
</tr>
<tr>
<td>State</td>
<td>52%</td>
<td>56%</td>
<td>50%</td>
<td>64%</td>
<td>51%</td>
<td>52%</td>
</tr>
<tr>
<td>Good</td>
<td>31%</td>
<td>41%</td>
<td>27%</td>
<td>34%</td>
<td>26%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**Safety Perceptions**

<table>
<thead>
<tr>
<th></th>
<th>Wellington City</th>
<th>Lower Hutt</th>
<th>Upper Hutt</th>
<th>Porirua</th>
<th>Kapiti Coast</th>
<th>Wairarapa</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>75%</td>
<td>80%</td>
<td>75%</td>
<td>70%</td>
<td>67%</td>
<td>74%</td>
</tr>
<tr>
<td>Supported</td>
<td>74%</td>
<td>78%</td>
<td>68%</td>
<td>78%</td>
<td>74%</td>
<td>79%</td>
</tr>
<tr>
<td>State</td>
<td>52%</td>
<td>56%</td>
<td>50%</td>
<td>64%</td>
<td>51%</td>
<td>52%</td>
</tr>
<tr>
<td>Good</td>
<td>83%</td>
<td>86%</td>
<td>85%</td>
<td>80%</td>
<td>85%</td>
<td>74%</td>
</tr>
</tbody>
</table>

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

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

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...

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

NOTE: numbers are rounded to the nearest whole
2016 Total CATI = 414
2018 Total = 2155. 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.

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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

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

8%

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
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

WALKING BEHAVIOIRS

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

AGREE THAT

• I have lots of friends and family who cycle
Recreational On Road Riders

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

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
Recreational Off Road Riders

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

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
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